

Union County, NC

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



Meeting Agenda

Monday, October 6, 2025

6:00 PM

Board Room, First Floor

Board of Commissioners

*Chair Melissa Merrell
Vice Chair Brian Helms
Commissioner Clancy Baucom
Commissioner Christina Helms
Commissioner Gary Sides*

Visitor Advisory

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

Closed Session - 5:15 PM

[25-620](#)

Closed Session

INFORMATION CONTACT:

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

ACTION REQUESTED:

Enter into Closed Session pursuant to NCGS 143-318.11.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

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

FINANCIAL IMPACT:

None.

Opening of Meeting - 6:00 PM

Invocation - Commissioner Gary Sides

Pledge of Allegiance

Informal Comments

Public Hearing(s)

[25-593](#)

Public Hearing - Rezoning Petition CZ-2025-007 Rodriguez

INFORMATION CONTACT:

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

ACTION REQUESTED:

Conduct public hearing for proposed rezoning

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This petition is requesting to rezone one parcel totaling two acres appearing on the tax map as tax parcel 09-128-014R located on

Pageland Highway from RA-40 to Light Industrial (LI) with Conditions in order to build a warehouse and storage yard for a telecommunications business. The rezoning will include the following conditions:

- 1) Limited to site plan dated July 21, 2025
- 2) Uses limited to office and warehouse
- 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

The Land Use Board unanimously recommended approval of this petition at its September 16, 2025, meeting. One person spoke against the rezoning, noting industrial uses adjacent to residential.

If the Board wishes to vote on this rezoning, 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-2025-007 from David Rodriguez; and (ii) adopt the consistency and reasonableness statement for denial.

FINANCIAL IMPACT:

None.

25-595

Public Hearing - Rezoning Petition CZ-2025-008 Union Power

INFORMATION CONTACT:

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

ACTION REQUESTED:

Conduct public hearing for proposed rezoning

PRIOR BOARD ACTIONS:

January 22, 2019, rezoning of site to RA-200 with Conditions

BACKGROUND:

This case is requesting to rezone one parcel totaling 161.1 acres appearing on the tax map as tax parcel 02-202-008 along Mills Harris Road from RA-200 CZ to RA-200 CZ with Amended Conditions in order to construct an electrical substation. This property is the Sheriff's Department Training Facility, and the land for the substation will be leased from Union County. The rezoning will include the following conditions:

- 1) Limited to approved site plan

- 2) Uses limited to electrical substation
- 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

The Land Use Board unanimously recommended approval of the rezoning petition, citing lack of impacts on rural character and meeting requirements for a special use permit.

No one spoke against the petition at the Land Use Board meeting.

FINANCIAL IMPACT:

None.

25-604

Public Hearing - Step 2 Economic Development Incentive Grant Request to Safe Fire Detection, Inc. (Project Smokey)

INFORMATION CONTACT:

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

ACTION REQUESTED:

Hold Public Hearing.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Economic Development Department started conversations with Safe Fire Detection, Inc under codename Project Smokey in 2023 about the potential relocation of their manufacturing operation from Indian Trail, NC, to a 10-acre parcel located within the Piedmont Innovation Industrial Park off Goldmine Road or a 14-acre parcel located in the Monroe Corporate Center. The company is considering the purchase of either the 10-acre parcel or the 14-acre parcel, the construction of a 40,000 square foot manufacturing facility, and the purchase and installation of new production equipment. Total capital investment is approximately \$10,000,000.

Safe Fire Detection, Inc. is a manufacturer of advanced fire detection systems for several key industry sectors including nuclear power, electric utilities, Petro-chemical, and space exploration. The company opened its doors in 1985 in Indian Trail. They have grown to employ 25 people, of whom 16 are Union County residents.

The company is at capacity at its current location and needs a building and land large enough to accommodate future business growth. The purchase of either parcel and the construction of a 40,000 SF facility would satisfy growth needs for years to come.

Based on the anticipated capital investment, it is proposed that the Board award a STEP 2 Economic Development Incentive Grant in an

amount-not-to-exceed \$141,000 paid over a 5-year period beginning in FY 2028. The value of the incentive grant will be based upon appraised value each year as appraised by the Union County Tax Administration Office. This grant is based on the company's projected investment of approximately \$10,000,000 in land, new building construction, and purchase and installation of new manufacturing equipment over the grant period, but not less than \$2,000,000. Based on its projected investment in Union County, the current tax rate, and assuming a consistent assessed value with no depreciation, the company will pay estimated ad valorem taxes on the new taxable investment in the amount of \$217,000 over the grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.

The grant is also contingent upon the company retaining its current number of employees located within Union County and creating a minimum of 10 new full-time jobs.

FINANCIAL IMPACT:

The project, if brought to Union County, would have an economic development incentive grant in an amount-not-to-exceed \$141,000 but would generate approximately \$217,000 in ad valorem taxes over the 5-year grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.

Staff Recognition

[25-600](#)

Popular Annual Financial Report Award

INFORMATION CONTACT:

Beverly Liles, Finance Director, 704-283-3675

ACTION REQUESTED:

Recognize Finance Staff for this Award.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Government Finance Officers Association is pleased to announce that Union County has received GFOA's Award for Outstanding Achievement in Popular Annual Financial Reporting (PAFR Award) for its Popular Annual Financial Report for the fiscal year ended June 30, 2024.

The Award represents a significant achievement by the entity. In order to be eligible for the PAFR Award, a government must also submit its annual comprehensive financial report to GFOA's Certificate of Achievement for Excellence in Financial Reporting Program and receive the Certificate for the current fiscal year. Each eligible report is reviewed by judges who

evaluate the report based on the following categories: reader appeal, understandability, distribution methods, creativity and other elements.

Government Finance Officers Association (GFOA) advances excellence in government finance by providing best practices, professional development, resources, and practical research for more than 25,000 members and the communities they serve.

FINANCIAL IMPACT:

None.

25-603

Service Award Recognition

INFORMATION CONTACT:

Jennifer Davis, Human Resources, Assistant Director, 704-283-3803

ACTION REQUESTED:

Short video will play to recognize employee service award recipients for Q3 including July, August & September.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

None.

Consent Agenda

25-596

Purchase - Intercom/Door Controls

INFORMATION CONTACT:

Dorothy Thomas, Union County Sheriff's Office, Business Manager, 704-283-3578

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Detention Center contracts with Black Creek Integrated Systems Corp. to service intercom and door control services within the facility. This contract has been in existence since 2011 when the system was initially installed. Since that time, there have been no

hardware/software upgrades to the system. The current system is severely outdated and has begun to see critical failures that pose serious safety and security concerns for the facility. Inability to utilize intercoms and/or door controls would not allow for contact with inmates and staff in the event of an emergency. The Union County Sheriff's Office is requesting \$665,063.87 in funds to acquire the software/hardware needed to update the current system, allowing it to perform to the ability needed.

N.C.G.S 143-129(e)(3) and N.C.G.S 143-129(e)(9) allow local governments to make purchases through a competitively bid North Carolina Statewide Term Contract or a Group Purchasing Program. The purchase of the Intercom/Door Control Services will be made using Group Purchasing Program OMNIA Partner IT Products and Services contract #23-6692-03 as quoted by Insight Public Sector, Inc.

FINANCIAL IMPACT:

The anticipated cost for the Intercom/Door Control Services is \$665,063.87 and is budgeted accordingly for FY2026.

25-609

Contract - Landscape Restoration Services

INFORMATION CONTACT:

Christopher Clark, UC Water - Water & 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' maintains and operates over 1,000 miles of water system infrastructure and over 700 miles of wastewater infrastructure. A large portion of the combined 1700+ miles of piping is located near roadway shoulders, and both residential and commercial areas. Once water/sewer lines are repaired due to age, material, pressure, third-party damage, etc., numerous restoration activities may be required to take place. The activities include compaction, landscaping, and sod repairs, among others. Due to this service requiring a very specific skill set and potential scheduling implications, this restoration service has been conducted by industry professionals. This effort has shown a great improvement in customer service by reducing the time required to restore yards, roadway areas, and commercial property.

The Procurement Department partnered with Union County Water to issue a Request for Proposals RFP 2025-024 Landscape Restoration Services. On June 5, 2025, one proposal was 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, Locust Property Management, LLC , to provide landscape restoration services. This contract has an initial term of three years with two one-year renewal options at the sole discretion of the County and is subject to annual budget appropriation.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$300,000. Since this contract contains an initial term of three years, with two one-year renewal options, a total of \$1,500,000 is estimated to be spent. Funding is available in the adopted FY26 budget with future expenditures subject to annual BOCC budget appropriation.

25-578

Public Health Clinical Service Fee Recommendations

INFORMATION CONTACT:

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

ACTION REQUESTED:

Review and approve requested fees to be added to the Human Services Agency's Department of Public Health Fee Schedule.

BACKGROUND:

In accordance with G.S. 130A-39(g), which allows local public health departments to implement fees for services rendered, the Union County Human Services Agency's Department of Public Health, with the approval of the Union County Consolidated Human Services Agency Board and the Board of County Commissioners, may implement specific fees for services. Medical clinic fees are established at the standard Medicaid rate plus 30%. Any fee without a standard Medicaid rate is established at the commercial rate plus 30%.

Approval to adopt fees the following CPT Code(s) is requested:

Local Use Tuberculosis Questionnaire (LUTBQ) - Tuberculosis Risk and Screening Questionnaire: \$10.00

Fee for nurses' evaluation and screening of patients to certify the absence of tuberculosis risk or symptoms. Used when skin testing is deferred due to patients' positive test history or shortage of PPD solution. This is a new flat fee to be paid by patients. It is not a "sliding" fee.

88305 - Biopsy of tissue pathological examination: \$109.43

Laboratory examination of biopsied specimens to identify abnormal cellular changes including precancerous or cancerous lesions collected during colposcopy procedures. This is a new fee. The current Medicaid rate for this service is \$84.15.

J0561- Penicillin G benzathine, per 100,000 units, injection (Bicillin L-A):

\$38.09

Intramuscular antibiotic injection for treatment of specified infections. This is an increase to an existing fee due to a change in the Medicaid rate. The current Medicaid rate for this service is \$29.30.

The Public Health Management team reviewed the fees and approved recommendation of this requested BOCC action at its September 3, 2025 meeting and the Consolidated Human Services Agency Board (CHSB) approved recommendation of this requested BOCC action at its September 8, 2025 meeting.

FINANCIAL IMPACT:

The revenue generated by the requested fee(s) will assist the Human Services Agency's Department of Public Health in covering associated clinical costs.

25-592

Budget Amendment - Social Services Emergency Placement Funds

INFORMATION CONTACT:

Ashley Lantz, Human Services Agency - Social Services, Director,
704-296-4380

ACTION REQUESTED:

1) Recognize, receive, and appropriate \$13,457 in additional funding from the NCDHHS Division of Social Services and 2) approve Budget Amendment #7.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

To help address ongoing challenges in securing treatment placements for children in DSS custody with complex behavioral health needs, NCDHHS DSS reallocated \$1,237,010 in unused Emergency Placement Funds associated with the behavioral health investment from the 2023 Appropriations Act to the DSS Emergency Placement Fund.

Each county will receive a base amount of \$10,000 and the remainder of the funds will be allocated based on each county's percentage of the foster care census. Union County will receive \$13,457. If county expenditures exceed the county's allocation, any excess payments will be county funded.

Emergency Placement Funds are intended to temporarily assist county departments of social services in addressing identified placement needs for children in the custody of the agencies who are awaiting a Medicaid leveled treatment placement. While children await the location of the placement, these funds can be used to prevent them from staying in a DSS office and enable local agencies to temporarily provide and arrange for essential needs of the individual to establish or maintain a placement.

Funds may be used only for youth opened for 109 Foster Care Case

Management Services on a DSS-5027 or in the Child Welfare Information System to cover client specific costs claimed for purposes of the following:

- 1) Maintaining a crisis placement through a contract that pays a retainer to an identified placement provider who will accept a temporary emergency placement until the appropriate behavioral health treatment placement is located.
- 2) Paying a short-term temporary enhanced rate to an identified placement provider who is currently or will provide care and supervision to youth who have behaviors that require an exceptional level of supervision. For children who are awaiting a Medicaid leveled treatment placement, these funds can be used to pay for a placement that will aid in meeting the child's immediate needs. The amount above the board rate will be reimbursed by submitting the DSS-1571 Part II.
- 3) Another local solution approved by DHHS as an Approved Alternative Option, that prevents a child in DSS custody from spending a night in the DSS office while waiting on the appropriate treatment placement as approved by NCDSS.

The Emergency Placement Funds are available for use immediately, and no prior approval is required except for purposes associated with a local alternative solution.

FINANCIAL IMPACT:

\$13,457 is allocated to the County with no additional County match required. If County expenditures exceed the allocation, any excess expenses / payments will be County funded.

25-608

Contract - Language Interpretation and Translation Services

INFORMATION CONTACT:

Jackie Morgan, Human Services Agency - Business Operations, Director, 704-296-4825

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Procurement Department partnered with Human Services to issue Request for Proposals 2025-021 Language Interpretation and Translation Services. The translation services will be utilized by both the Health and Social Services Divisions of Human Services. Previously, each division had its own separate agreement. On April 29, 2025, twenty-eight proposals were received and reviewed by an evaluation team in

accordance with applicable evaluation criteria for this project. The top ranked four firms/vendors were invited to shortlist interview/presentations. As a result, the team requests approval to enter into a contract with the top scoring/ranked preferred offeror, MasterWord Services Inc., to provide language interpreting and translation services.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$200,000. Since this contract contains a two-year initial term with three one-year renewal options, a total of \$1,000,000 is estimated to be spent. Funding is available in the adopted FY26 budget with future expenditures subject to annual BOCC budget appropriation.

25-614

Budget Amendment - Environmental Health

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Recognize, receive, and appropriate \$27,255 in additional state funding from the North Carolina Division of Public Health for Environmental Health Division staff to address lead in water and lead-based paint in public schools and childcare facilities and 2) adopt Special Revenue Ordinance #92A.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Lead and asbestos are well known to be hazardous to human health and particularly the health of children, whose bodies are still developing and who are therefore uniquely vulnerable to the risks posed by lead and asbestos. Although the use of certain materials containing lead and asbestos has been banned in the United States, exposure to both lead and asbestos hazards can still occur in the built environment through things like deteriorating lead-based paint, lead containing pipes, plumbing fixtures, and solder that are used to carry drinking water, asbestos ceiling and floor tiles, asbestos insulation, and other products and materials containing lead or asbestos. Exposure to lead and asbestos hazards can be prevented by inspecting facilities and then restricting access to, remediating, or abating any hazards that are identified through the inspection process.

This Agreement Addendum (AA914 - ARPA Addressing Lead in Water and Lead-Based Paint in Public Schools and Child Care Facilities) provides funds for Union County Public Health to (1) conduct first draw, post-remediation water lead samples at schools and childcare facilities according to proposed administrative rules 10ANCAC 41C .1005; (2). Conduct follow-up and environmental lead investigations for those schools and facilities where lead-based paint hazards are identified and remain unaddressed; (3) documenting all site visits in the North Carolina

Lead Surveillance System (NC LEAD); and (4) document compliance by the schools and facilities with the inspection requirements in 10A NCAC 41C .1004 during local health department routine visits.

FINANCIAL IMPACT:

The County will receive \$27,255 in FY26 funding from the North Carolina Division of Public Health for the Environmental Health Division of the Union County Public Health Department to address lead in water and lead-based paint in public schools and childcare facilities. No County match is required

25-579

Tax Bill Correction Report for August 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve Tax Bill Correction Reports for August 2025.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

August Refund amount = \$10,249.90

25-597

August 2025 NCVTS Motor Vehicle Tax Report

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve the August 2025 NCVTS Motor Vehicle Tax Refund Report.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

\$1,387.65

[25-589](#)**Resolution - Surplus Vehicle Sale****INFORMATION CONTACT:**

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

ACTION REQUESTED:

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

BACKGROUND:

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

The sale will begin October 8, 2025, at 9:00 AM and end October 21, 2025, with incremental closings as indicated on Attachment A. A summary of the vehicle information is listed below. Additional vehicle information can be found on Attachment A.

Facilities and Fleet Management

- (1) 2007 CHEVROLET COLORADO

Union County Water

- (1) 2004 CHEVROLET EXPRESS
- (1) 2004 CHEVROLET C8500

UCSO

- (1) 2002 CHEVROLET SILVERADO 2500
- (1) 2012 DODGE CHARGER
- (1) 2012 FORD F150

Solid Waste

- (1) FORD F150 4X4

Building Code Enforcement

- (1) 2013 FORD F150

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

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

FINANCIAL IMPACT:

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

25-613

Resolutions - Donation of Surplus Property to Town of Fairview & Union County Public Schools

INFORMATION CONTACT:

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

ACTION REQUESTED:

Adopt Resolutions Authorizing Conveyance of Certain Surplus Property to Town of Fairview and Union County Public Schools.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County desires to declare surplus and donate one mower and one truck to Town of Fairview and two trucks to Forest Hills High School's Automotive and Agriculture programs.

Town of Fairview:

- 1) Union County Hustler Mower 60" Mowing Deck
- 2) Union County Vehicle # 30-07: 2007 Ford F150

Union County Public Schools - Forest Hills High School:

- 1) Union County Vehicle # 36-02: 2002 Ford F250 4x4
- 2) Union County Vehicle # 04-14: 2014 Ford F250 4x4

FINANCIAL IMPACT:

None.

25-601

Travel Policy Revision for International Travel

INFORMATION CONTACT:

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

ACTION REQUESTED:

Adopt Revised Travel Policy to include language for international travel.

PRIOR BOARD ACTIONS:

Travel Policy was adopted February 17, 2014, and revised on August 14, 2023.

BACKGROUND:

The currently adopted Travel Policy does not include any parameters or guidelines for international travel. Over the past year Union County has hired Economic Development employees that travel internationally for trade shows and other economic development opportunities. Based on this need Management and Staff are recommending revising the Travel Policy to include parameters and guidelines for international travel.

FINANCIAL IMPACT:

None.

25-606**Contract - Janitorial Services****INFORMATION CONTACT:**

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Facilities and Fleet Management completed an assessment of our Janitorial Services Contract in FY2025 and concluded that a two-contract structure would potentially pose a lower risk to the County given the current state of the janitorial market. A common issue that contractors face in the market is finding, hiring and retaining quality staff. That issue has contributed to lower quality of work and inconsistent service delivery.

This request is to approve the second of two janitorial contracts that will service all general government and UC Water facilities. The Board previously approved the first of the two contracts at the May 19, 2025, meeting and the contract went into effect on July 1, 2025. This contract will include custodial services for approximately 66% of the county's general government and UC Water facilities and will go into effect on November 1, 2025.

The breakdown of the buildings serviced by each of the two custodial contracts is below:

Contract #1 previously awarded by Board on May 19, 2025, to Citywide: Buildings serviced include Jefferson Street (leased), Agriculture Center,

Emergency Services, Simpson Event Center, Judicial Center, UCSO Animal Shelter, UCSO Firing Range, UCSO Administration Building, and Old UCSO Administration Building.

Contract #2 (REQUESTED TO BE APPROVED IN THIS AGENDA ITEM)

- Recommendation to award to Integrity:

Buildings to be serviced include Adult Probation (leased), Farmers Market, Government Center, Historic Courthouse, Historic Post Office, Human Services, Juvenile Probation (leased), Main Library/Board of Elections, Marshville Library, Patton Ave, Progress Building, Southwest Regional Library, UCPS Administration, Union West Library, 12 Mile Creek, Crooked Creek, Public Works Operations Center, and Yadkin Water Plant.

The Procurement Department partnered with Facilities & Fleet Management to issue Request for Proposals RFP#2025-056 Janitorial Services. On July 1, 2025, twenty-six proposals were received and reviewed by an evaluation team in accordance with applicable evaluation criteria for this project. The top ranked three firms/vendors were invited to shortlist interview/presentations. As a result, the team requests approval to enter into a contract with the top scoring/ranked preferred offeror, Integrity National Corporation, to provide janitorial services.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$1,100,558. Since this contract contains an initial term of two years with three one-year renewal options, a total of \$5,502,790 is estimated to be spent. Funding is available in the adopted FY26 budget with future expenditures subject to annual BOCC budget appropriation.

25-607

Contract Amendment - Landscaping Services

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

- 1) November 1, 2021, Regular Meeting, Agenda Item #21-346, Approved initial contract
- 2) June 6, 2022, Regular Meeting, Agenda Item #22-318, Approved amendment to add Emergency Services and Sheriff's Office
- 3) November 1, 2024, Regular Meeting, Agenda Item #24-593, Approved one-year contract renewal

BACKGROUND:

The Facilities & Fleet Management department has utilized the contractual services of Lawrence Companies, LLC D/B/A Providence Landscape Group for landscape services since November 1, 2021. The company has been effective and efficient in meeting our service needs, and we are requesting to continue this service for an additional one year and adding the Union County Cemetery on Cresthaven Drive, Monroe, NC to the service locations.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$494,495.00 and is budgeted accordingly for FY26.

25-610

Contract Renewal - Managed Print Services

INFORMATION CONTACT:

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

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:

September 19, 2022, Regular Meeting, Agenda Item #22-648 - Approved initial agreement

BACKGROUND:

The Information Technology Department has utilized the contractual services of Sharp Leasing USA Corporation for Managed Print Services since October 2022. The company has been effective and efficient in meeting our service needs, and we are requesting to continue this service for an additional twenty-four months.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$235,749. Since this contract renewal contains a two-year term, a total of \$471,498 is anticipated to be spent. Funding is available in the adopted FY26 budget with future expenditures subject to annual BOCC budget appropriation.

25-612

Budget Amendment - Property & Casualty Internal Service Fund

INFORMATION CONTACT:

Jeff Morgan, Security & Risk Management, Director, 704-292-2679

ACTION REQUESTED:

Approve Budget Amendment #8 to cover the cost to add five locations to the Pollution Policy.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Staff recently investigated the process, policies, and procedures in the event of spills related to county business such as fuel, chemicals from

UCW plants, or other hazardous materials.

During the investigation, it was determined that Union County has a pollution policy issued by Chubb environmental insurance, which covers against damages from unintended release of pollutants not normally covered by liability and property policies. The locations currently covered by the Chubb policy include Water Treatment Facilities, Wastewater Treatment Facilities, over 50 wastewater lift stations, hundreds of miles of wastewater lines, and several water booster stations. This policy offers coverage in the event of a hazardous spill and offers 24-hour access to an Environmental Spill Center which will be able to dispatch an environmental contractor to assist with spill remediation.

Additionally, it was determined that eight sites housing bulk chemicals (diesel, treatment chemicals, fluids, motor oil, etc.) were not included in the pollution policy that was put in place July 2023. Three of the locations, UCW Operations Center, Norwood Intake, and Yadkin WTP were added at no cost as they were associated with the existing policy. The other five locations are listed below:

- 1) Emergency Services - 2330 Concord Avenue
- 2) Fleet Services - 610 Patton Avenue
- 3) Cane Creek Park - 5213 Harkey Road
- 4) Jesse Helms Park - 1505 Summerlin Dairy Road
- 5) Sheriff's Office - 3344 Presson Road

The cost to add the five locations through the remainder of the policy (July 2026) is \$10,619. Budget Amendment #8 appropriates funds from the fund balance of the Property & Casualty Internal Service Fund to cover the cost to add these five locations to the Pollution Policy.

FINANCIAL IMPACT:

The cost to add the five locations through the remainder of the policy (July 2026) is \$10,619. Funding is available in the fund balance of the Property & Casualty Internal Service Fund.

25-602

Minutes for Approval

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve minutes on Consent Agenda

PRIOR BOARD ACTIONS:

None

BACKGROUND:

Draft minutes have been provided to the Board for review and approval at the October 6, 2025, regular meeting.

FINANCIAL IMPACT:

None

Information Only

[25-585](#)

Contract Report April – June 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

As noted on contracts and purchase orders.

[25-591](#)

Human Resources Reports for August 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

These reports include all new hires, separations from service, and retirements for Union County Local Government for the month of August 2025.

FINANCIAL IMPACT:

None.

[25-598](#)

Tax Refunds, Releases and Prorations Approved by Finance Officer

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

On September 8, 2020, the Board of Commissioners adopted a Resolution Delegating Authority for Tax Releases and Refunds of less than \$100 to Union County's Finance Officer. The resolution and NC GS 105-381(b) require such refunds to be reported to the Board regarding

actions taken on requests for releases or refunds. All such actions shall be recorded in the Board's minutes. NC GS 105-330.6 authorizes the tax collector to direct an order for a tax refund of prorated taxes to the county finance officer related to surrendering of registered motor vehicle plates. The finance officer shall issue a refund to the vehicle owner. The attached report is for August 2025 NCVTS releases and refunds less than \$100 and prorations approved by the finance officer.

FINANCIAL IMPACT:

None.

25-599

Tax Collector's Departmental Report for August 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This report reflects the totals of all tax transactions within the Tax Collector's Office for the month of August 2025 as required by NCGS 105-350(7).

FINANCIAL IMPACT:

None.

Business

25-605

Consider a Step 2 Economic Development Incentive Grant Request to Safe Fire Detection, Inc. (Project Smokey)

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Award a Step 2 Economic Development Incentive Grant to Safe Fire Detection, Inc. (Project Smokey) in an amount not-to-exceed \$141,000 over a five-year period; and 2) authorize the County Manager to i) negotiate and execute an agreement substantially consistent with this agenda item, ii) exercise any renewal or extension term options set forth in the Agreement, and iii) terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.

PRIOR BOARD ACTIONS:

October 6, 2025, Regular Meeting, Agenda Item # 25-604 - Public Hearing Held

BACKGROUND:

The Union County Economic Development Department started conversations with Safe Fire Detection, Inc under codename Project Smokey in 2023 about the potential relocation of their manufacturing

operation from Indian Trail, NC, to a 10-acre parcel located within the Piedmont Innovation Industrial Park off Goldmine Road or a 14-acre parcel located in the Monroe Corporate Center. The company is considering the purchase of either the 10-acre parcel or the 14-acre parcel, the construction of a 40,000 square foot manufacturing facility, and the purchase and installation of new production equipment. Total capital investment is approximately \$10,000,000.

Safe Fire Detection, Inc. is a manufacturer of advanced fire detection systems for several key industry sectors including nuclear power, electric utilities, Petro-chemical, and space exploration. The company opened its doors in 1985 in Indian Trail. They have grown to employ 25 people, of whom 16 are Union County residents.

The company is at capacity at its current location and needs a building and land large enough to accommodate future business growth. The purchase of either parcel and the construction of a 40,000 SF facility would satisfy growth needs for years to come.

Based on the anticipated capital investment, it is proposed that the Board award a STEP 2 Economic Development Incentive Grant in an amount-not-to-exceed \$141,000 paid over a 5-year period beginning in FY 2028. The value of the incentive grant will be based upon appraised value each year as appraised by the Union County Tax Administration Office. This grant is based on the company's projected investment of approximately \$10,000,000 in land, new building construction, and purchase and installation of new manufacturing equipment over the grant period, but not less than \$2,000,000. Based on its projected investment in Union County, the current tax rate, and assuming a consistent assessed value with no depreciation, the company will pay estimated ad valorem taxes on the new taxable investment in the amount of \$217,000 over the grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.

The grant is also contingent upon the company retaining its current number of employees located within Union County and creating a minimum of 10 new full-time jobs.

FINANCIAL IMPACT:

The project, if brought to Union County, would have an economic development incentive grant in an amount-not-to-exceed \$141,000 but would generate approximately \$217,000 in ad valorem taxes over the 5-year grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.

[25-550](#)

Wastewater Pump Station Approval Request – Sanctuary at Southgate Phase II Development

INFORMATION CONTACT:

Brian Matthews, County Manager, 704-292-2597

ACTION REQUESTED:

Receive information on the request for approval of a wastewater pump station to serve the proposed Sanctuary at Southgate Phase II development and approve or deny as appropriate.

PRIOR BOARD ACTIONS:

February 18, 2025, Regular Meeting, Agenda Item # 25-053 - Received and denied the wastewater pump station approval request for the Sanctuary at Southgate Phase II Development.

BACKGROUND:

Pursuant to documentation requirements and amendments to the Union County Code of Ordinances adopted by the Board of Commissioners, the use of wastewater pump stations for sewer extensions requires approval by the Board of Commissioners. Per the Ordinance, developers are allowed to resubmit approval requests once six months have passed from any prior Board action.

BGE Inc. has prepared and submitted documentation regarding the proposed Sanctuary at Southgate Phase II development. The documents have been reviewed by UCW staff and were found to comply with the adopted requirements.

The proposed Sanctuary at Southgate Phase II Development is unchanged from the original submittal.

FINANCIAL IMPACT:

None.

County Manager's Comments

Commissioners' Comments

Adjournment



Union County, NC

Staff Report

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

File #: 25-620

Agenda Date: 10/6/2025

TITLE:

Closed Session

INFORMATION CONTACT:

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

ACTION REQUESTED:

Enter into Closed Session pursuant to NCGS 143-318.11.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

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

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

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

File #: 25-593

Agenda Date: 10/6/2025

TITLE:

Public Hearing - Rezoning Petition CZ-2025-007 Rodriguez

INFORMATION CONTACT:

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

ACTION REQUESTED:

Conduct public hearing for proposed rezoning

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This petition is requesting to rezone one parcel totaling two acres appearing on the tax map as tax parcel 09-128-014R located on Pageland Highway from RA-40 to Light Industrial (LI) with Conditions in order to build a warehouse and storage yard for a telecommunications business. The rezoning will include the following conditions:

- 1) Limited to site plan dated July 21, 2025
- 2) Uses limited to office and warehouse
- 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

The Land Use Board unanimously recommended approval of this petition at its September 16, 2025, meeting. One person spoke against the rezoning, noting industrial uses adjacent to residential.

If the Board wishes to vote on this rezoning, 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-2025-007 from David Rodriguez; 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 205
Monroe, NC 28112
T: 704.283.3563
E: UCPlanning@unioncountync.gov

General Information

Project Address 2714 Pageland Hwy City Monroe State NC Zip 28112

Tax Parcel ID 09-128-014-R Current Zoning Designation RA-40 Total Acres 2

Proposed Zoning Designation LI Date Submitted 1/24/2025

Contact Information

Applicant Name David Rodriguez

Address 4508 Poplin Grove Dr City Indian Trail State NC Zip 28079

Phone [REDACTED] Fax [REDACTED] Email [REDACTED]

Property Owner Name Neuse Telecom, LLC

Address 4508 Poplin Grove Dr City Indian Trail State NC Zip 28079

Phone [REDACTED] Fax [REDACTED] Email [REDACTED]

Applicant's Certification

Signature [Signature]

1/24/2025
Date

Edith Suarez
David Rodriguez
Printed Name/Title

Owner's Certification

Signature [Signature]

1/24/2025
Date

Edith Suarez
David Rodriguez
Printed Name/Title

Union County Office Use Only:

Case Number 2025-CZ-007 Date Received: 6-24-25

Amount of Fee (\$900) \$1,000 Fee Ok. BEA Received by BEA

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



*The fee amount is only valid from July 1, 2023 - June 30, 2024



LETTER OF INTENT

Indian Trail June 20, 2025

RE: Conditional Rezoning
Parcel No: 09128014R

This shall serve as the required letter of intent to rezone parcel 09128014R located off US 601S from RA-40 to LI for the use of an office and warehouse site for Neuse Telecom, LLC.

Thank you,

A handwritten signature in blue ink, appearing to read 'David Rodriguez', with several loops and a long horizontal stroke extending to the right.

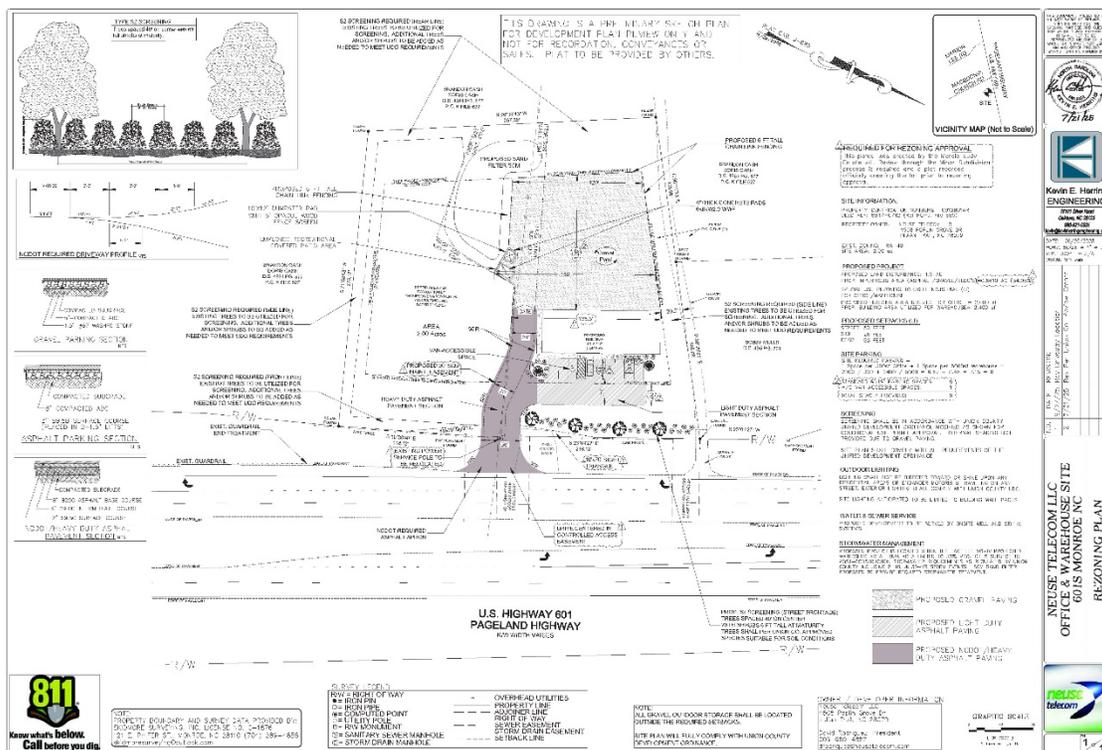
David Rodriguez
President

Planning Staff Report - Rezoning Case # CZ-2025-007
Staff Contact: Bjorn Hansen, Senior Planner

Summary of Request

This case is requesting to rezone one parcel totaling two acres appearing on the tax map as tax parcel 09-128-014R located on Pageland Highway from RA-40 to Light Industrial (LI) with Conditions. The rezoning will include the following conditions:

- 1) Limited to site plan dated July 21, 2025
- 2) Uses limited to office and warehouse
- 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



Owner/Applicant

Owner: Neuse Telecom, LLC
4508 Poplin Grove Drive
Indian Trail, NC 28079

Applicant: David Rodriguez
4508 Poplin Grove Drive
Indian Trail, NC 28079

Property Information

Location: On the west side of Pageland Highway north of Eudy Road. Location more specifically described as tax parcel 09-128-014R.



Municipal Proximity: The site is slightly more than a half mile south of the City of Monroe.

Existing Land Use and Development Status: The parcel is currently zoned RA-40 and is undeveloped.

Development Status

Petition: 2025-CZ-007

Name: Rodriguez

Size: 2 acres

Tax Parcel: 09-128-014R



Legend

-  Rezoning Parcel
-  Parcels
-  Roads
-  2023 Structures

Data Disclaimer
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Environmental Features: There are no streams, wetlands or floodplain on site.

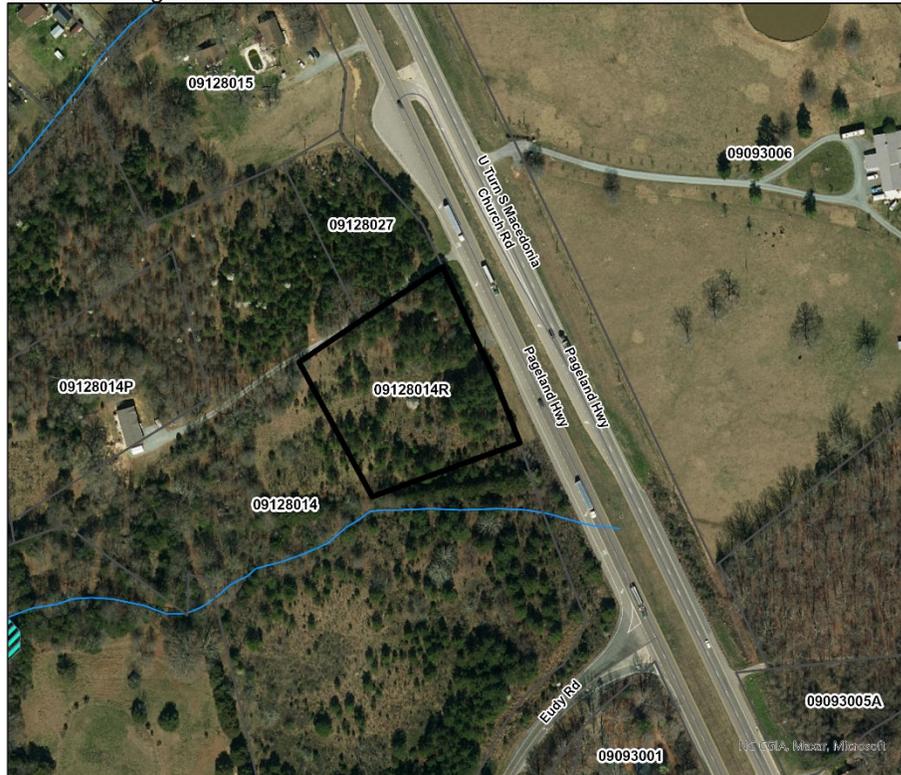
Environmental Features

Petition: 2025-CZ-007

Name: Rodriguez

Size: 2 acres

Tax Parcel: 09-128-014R



Legend

-  Rezoning Parcel
-  Parcels
-  Roads
-  Streams
-  Wetlands Areas

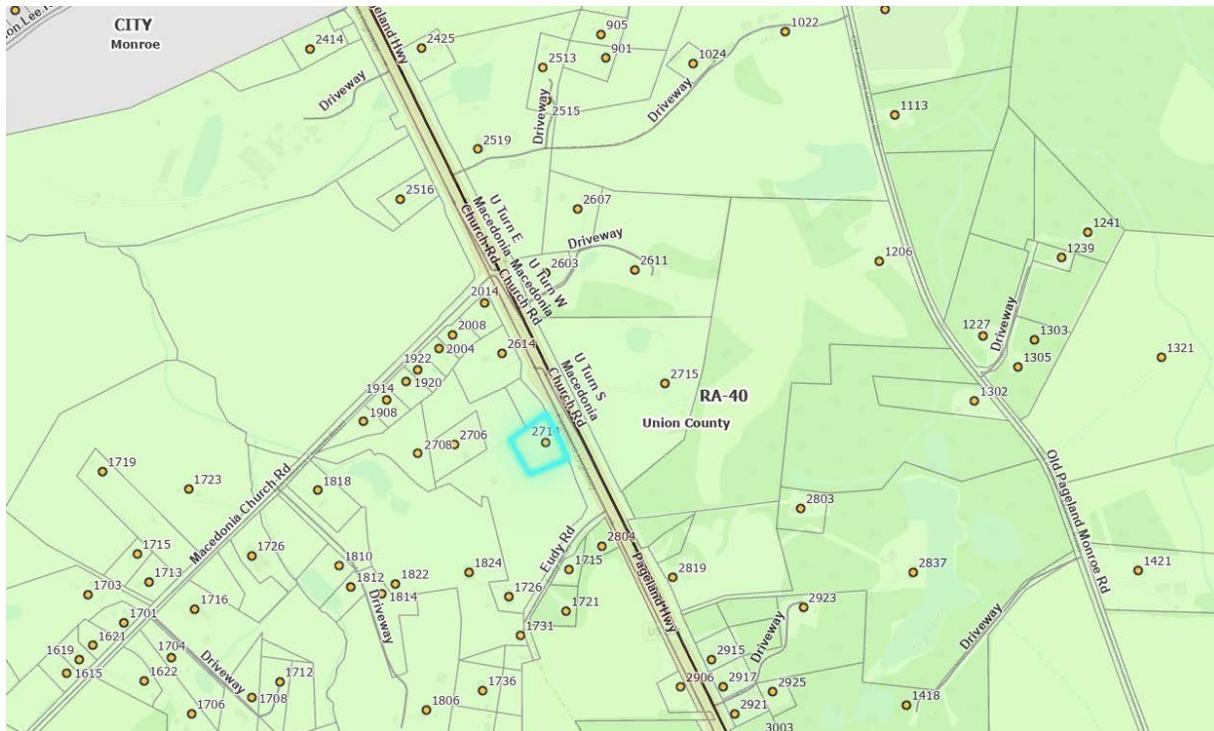
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Utilities: Public water and sewer are not available to the site.

Zoning and Land Use History: The parcel site has been zoned RA-40 since zoning was initiated. A 2.43 acre site approximately 1,000' north was proposed for rezoning to B-4 in 1989, but was denied. A 6.391 acre site approximately 1/3 of a mile north of the site was rezoned to Light Industrial in 2023. A special use permit for the permanent location of a mobile home approximately 700 feet south of the site was approved in 1981.



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

Transportation: This site is on US 601, which is a NCDOT-maintained facility. This section of US 601 carries approximately 12,500 vehicles per day. There are no funded road improvement projects in the immediate vicinity of the rezoning. A traffic Impact Analysis was not required for this rezoning. Anticipated traffic from this site is expected to be low but will involve commercial truck traffic.

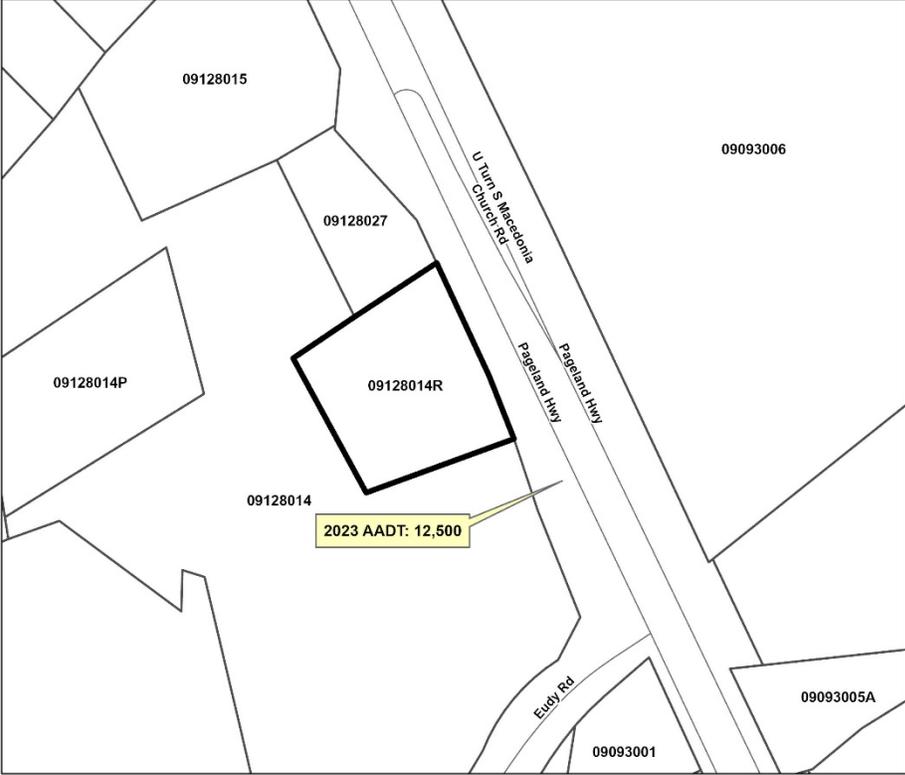
Transportation

Petition: 2025-CZ-007

Name: Rodriguez

Size: 2 acres

Tax Parcel: 09-128-014R

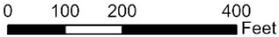


Legend

-  Rezoning Parcel
-  Parcels
-  Roads

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Created on June 24, 2025 by Bjorn E. Hansen, AICP CTP.
Contact: (704) 283-3690 or bjorn.hansen@unioncountync.gov



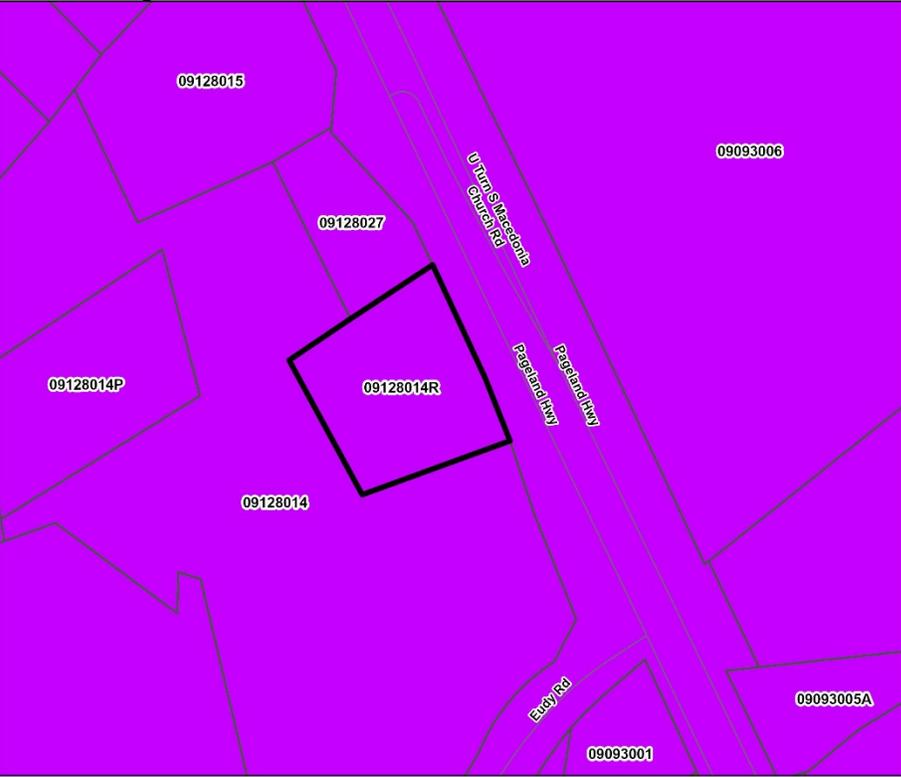
Planning Documents

Union County Comprehensive Plan: The Union County 2050 comprehensive plan identifies this area as an Employment Corridor overlaid upon Rural Residential. The proposed office and warehouse uses are therefore considered appropriate, provided that the site plan can meet County development standards.

Land Use Map

Petition: 2025-CZ-007
Name: Rodriguez

Size: 2 acres
Tax Parcel: 09-128-014R

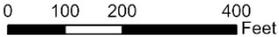


Legend

-  Rezoning Parcel
-  Parcels
-  Roads
-  Employment Corridor
-  Rural Residential

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Created on June 24, 2025 by Bjorn E. Hansen, AICP CTP.
Contact: (704) 283-3690 or bjorn.hansen@unioncountync.gov



Public and Municipal Comments

Public Comments: A community meeting was held August 26, 2025. One member of the public attended. They had questions about road access and whether the site would use their driveway, extent of the rezoning as well as concerns over impacts on property values. No changes were made based on feedback.

One person spoke against the rezoning at the September 16, 2025, Land Use Board meeting, noting conflicts with other industrial properties nearby in conflict with residential uses.

Municipal Comments: Monroe was not consulted due to the distance to their municipal limits.

Land Use Board Recommendation

The Land Use Board unanimously recommended approval at its September 16, 2025, meeting, citing consistency with the land use map and ability to meet development standards.

Staff Comments and Recommendation

This part of Union County is identified for employment uses as an overlay over rural residential and agricultural land uses. The rezoning proposes warehouse and office uses are appropriate for this part of the corridor. The proposed site plan meets the unified development ordinance and is consistent with the adopted plan. Because of these aspects of the development, staff recommend **approval** of this rezoning application.

BOCC Motions for Proposed Amendment to the Union County Zoning Map (CZ-2025-007)

The Union County Land Use Board recommended that the Union County Board of Commissioners approve the rezoning petition (CZ-2025-007) submitted by David Rodriguez, requesting a revision of the Union County Zoning Map by rezoning one parcel totaling two acres appearing on the tax map as tax parcel 09-128-014R located on Pageland Highway from RA-40 to Light Industrial (LI) with Conditions.

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

Motion

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

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

Motion

(i) Deny rezoning petition CZ-2025-007 from David Rodriguez; 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-2025-007) submitted by David Rodriguez, requesting a revision of the Union County Zoning Map by rezoning one parcel totaling two acres appearing on the tax map as tax parcel 09-128-014R located on Pageland Highway 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-2025-007)

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

1. The proposed use is consistent with the Plan. The Plan’s Land Use Map identifies this area as Rural Residential with an Employment Corridor overlay. The Plan provides that a variety of employment uses may be appropriate along an Employment Corridor. Development uses that may be appropriate include distribution, logistics, aeronautics, industrial, and agri-business. A rezoning to light industrial with conditions, to include warehouse and office uses, is consistent with such uses contemplated in an Employment Corridor.
2. The use set forth under the conditions would meet Union County development standards.

**CONSISTENCY AND REASONABLENESS STATEMENT FOR DENIAL OF THE
PROPOSED AMENDMENT (THE PROPOSAL IS INCONSISTENT WITH THE
CURRENT PLAN) (CZ-2025-007)**

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

1. Continued and future 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.
2. The proposed rezoning will facilitate ongoing and potential future industrial uses in close proximity to existing residential uses, including residential uses in areas identified as Rural Residential.

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-2025-007) submitted by David Rodriguez (the “Applicant”), requesting a revision of the Union County Zoning Map by rezoning one parcel totaling two acres appearing on the tax map as tax parcel 09-128-014R located on Pageland Highway from RA-40 to Light Industrial (LI) with Conditions; 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 09-128-014R located on Pageland Highway 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 _____, 2025.

Chair, Union County Board of Commissioners



Union County, NC

Staff Report

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

File #: 25-595

Agenda Date: 10/6/2025

TITLE:

Public Hearing - Rezoning Petition CZ-2025-008 Union Power

INFORMATION CONTACT:

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

ACTION REQUESTED:

Conduct public hearing for proposed rezoning

PRIOR BOARD ACTIONS:

January 22, 2019, rezoning of site to RA-200 with Conditions

BACKGROUND:

This case is requesting to rezone one parcel totaling 161.1 acres appearing on the tax map as tax parcel 02-202-008 along Mills Harris Road from RA-200 CZ to RA-200 CZ with Amended Conditions in order to construct an electrical substation. This property is the Sheriff's Department Training Facility, and the land for the substation will be leased from Union County. The rezoning will include the following conditions:

- 1) Limited to approved site plan
- 2) Uses limited to electrical substation
- 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

The Land Use Board unanimously recommended approval of the rezoning petition, citing lack of impacts on rural character and meeting requirements for a special use permit.

No one spoke against the petition at the Land Use Board meeting.

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 1424 Mills Harris Rd City Monroe State NC Zip 28112

Tax Parcel ID 02202008 Current Zoning Designation RA-200CZ Total Acres 161.1

Proposed Zoning Designation RA-200CZ Date Submitted _____

Amended

Contact Information

Applicant Name Union Electric Membership Corporation (Union Power)

Address 1525 N Rocky River Rd. City Monroe State NC Zip 28110

Phone 704 289 3145 Fax _____ Email matt.baucum@union-power.com

Property Owner Name Union County North Carolina

Address 500 N Main St. STE 709 City Monroe State NC Zip 28112

Phone _____ Fax _____ Email _____

Applicant's Certification

Matthew S. Baucum
Signature

6/25/25
Date

Matthew S. Baucum / Plant Development Engineer
Printed Name/Title

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

Brian W. Matthews
Signature

6/24/25
Date

Brian W. Matthews, County Manager
Printed Name/Title

Union County Office Use Only:

Case Number: 2025-CZ-008 Date Received: 7-8-25

Amount of Fee: \$1000 Fee Ok: BTA Received by: BEH

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



**This document is only valid from July 1, 2024 - June 30, 2025

WINGATE ELECTRICAL SUBSTATION

PROJECT NARRATIVE

SITE LOCATION:

1424 Mills Harris Rd
Marshallville, NC
Union County PIN No. 02202008

PREPARED BY:



Pike Engineering
1800 Innovation Dr., Suite, 200
Ft Mill, SC 29715
Phone: 843.697.0606

PREPARED FOR
Union Electric Membership Corporation
1525 N. Rocky River Rd.
Monroe, NC 28110
Phone: 704.289.3185

DATE: July 8, 2025

PROJECT SUMMARY

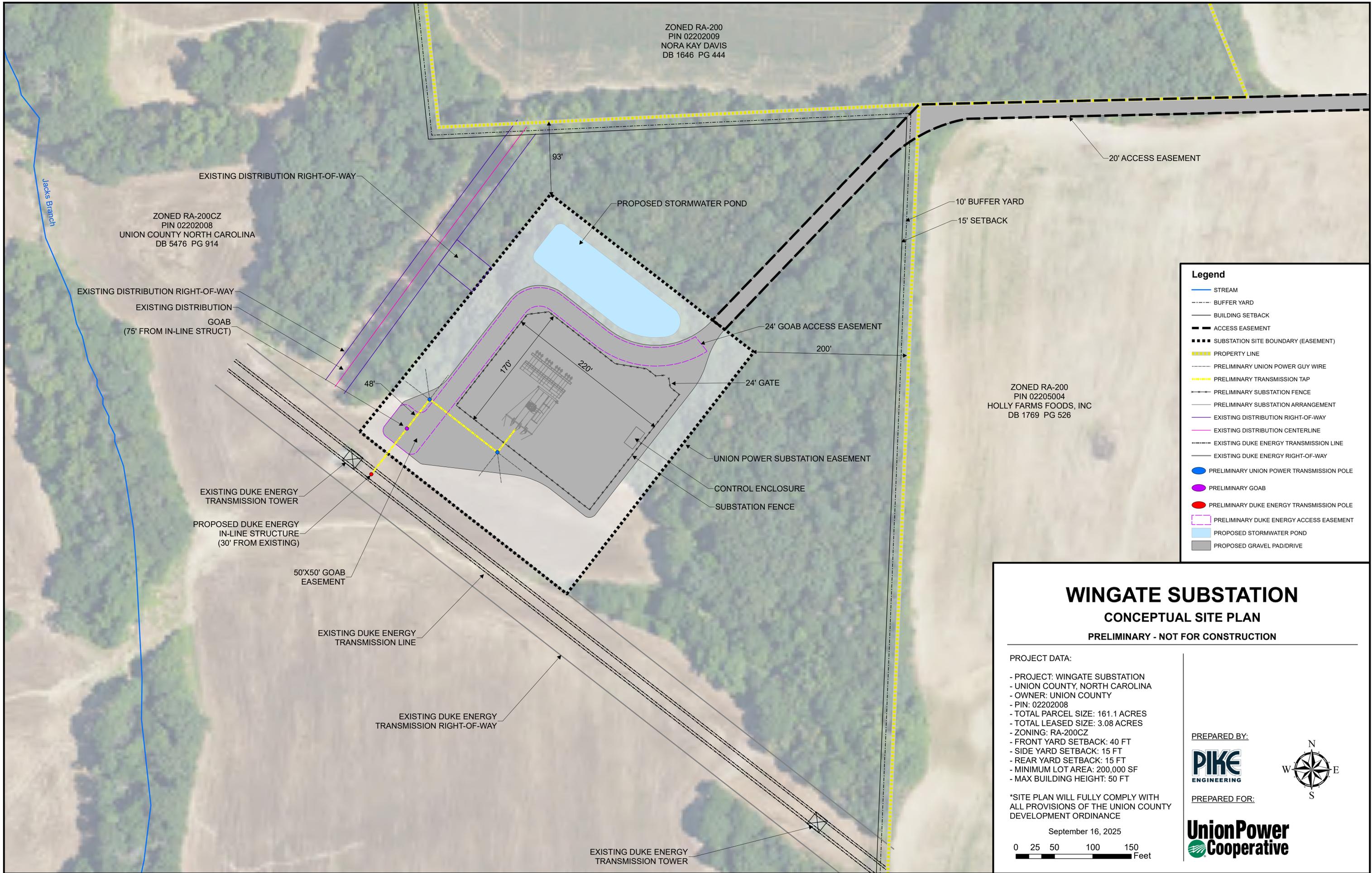
This project proposes to construct a new electrical substation to increase capacity and reliability of the electrical power grid on in Union County, NC. Union Electric Membership Corporation (Union Power) will be adding to the electrical grid capacity by constructing the substation on a parcel of land currently owned by Union County, NC. The property is located at 1424 Harris Mills Rd., Marshallville, NC. identified in the Union County Geographic Information System (GIS) as PIN # 02202008.

The lease area for the substation is located in the northeast corner of the parent parcel. The parent property is 167.1 acres. Lease area is 3.08 acres not including an access easement. The access easement provides access from Ansonville Rd. through an existing gravel road to the east on property owned by Holly Farms Foods, Inc. The access easement continues from the gravel road west through the Holly Farms parcel to the lease area on Union County property. The access easement from the existing gravel road to the lease area will be improved through the construction of a new 20 ft wide access drive. Both the lease property and the access easements have been recorded in the Union County Record of Deeds office.

The parent parcel owned by Union County is currently zoned RA-200CZ and was re-zoned in 2018 as a Planned Unit development (PUD). Union County Sheriff's Department maintains a training facility on the west side of the property along Harris Mills Rd. The PUD approved in 2018 indicates additional planned facilities to be constructed in the future although no new developments have been constructed at this time.

The substation will include a fenced compound approximately 240' x 170'. The parcel is approximately 400 ft east of Jack's Branch stream on undeveloped land adjacent to both an existing electrical transmission easement and an existing electrical distribution easement. The lease parcel location makes access to the electrical efficient and economical.

Preparation of the site plan includes compliance with all zoning regulations applicable to Zone RA-200. In addition, the substation development will necessitate the construction of temporary and permanent stormwater controls. All paved surfaces will be gravel construction. The lease parcel location allows for maintenance of requisite existing vegetation along the adjacent property lines and meets all setback requirements for those properties. Once the substation structures are completed, view of the substation will be limited by the vegetation to remain after development is complete. A preliminary site plan has been included with this submittal to assist in describing the proposed development.



Legend

- STREAM
- BUFFER YARD
- BUILDING SETBACK
- ACCESS EASEMENT
- SUBSTATION SITE BOUNDARY (EASEMENT)
- PROPERTY LINE
- PRELIMINARY UNION POWER GUY WIRE
- PRELIMINARY TRANSMISSION TAP
- PRELIMINARY SUBSTATION FENCE
- PRELIMINARY SUBSTATION ARRANGEMENT
- EXISTING DISTRIBUTION RIGHT-OF-WAY
- EXISTING DISTRIBUTION CENTERLINE
- EXISTING DUKE ENERGY TRANSMISSION LINE
- EXISTING DUKE ENERGY RIGHT-OF-WAY
- PRELIMINARY UNION POWER TRANSMISSION POLE
- PRELIMINARY GOAB
- PRELIMINARY DUKE ENERGY TRANSMISSION POLE
- PRELIMINARY DUKE ENERGY ACCESS EASEMENT
- PROPOSED STORMWATER POND
- PROPOSED GRAVEL PAD/DRIVE

WINGATE SUBSTATION

CONCEPTUAL SITE PLAN

PRELIMINARY - NOT FOR CONSTRUCTION

PROJECT DATA:

- PROJECT: WINGATE SUBSTATION
- UNION COUNTY, NORTH CAROLINA
- OWNER: UNION COUNTY
- PIN: 02202008
- TOTAL PARCEL SIZE: 161.1 ACRES
- TOTAL LEASED SIZE: 3.08 ACRES
- ZONING: RA-200CZ
- FRONT YARD SETBACK: 40 FT
- SIDE YARD SETBACK: 15 FT
- REAR YARD SETBACK: 15 FT
- MINIMUM LOT AREA: 200,000 SF
- MAX BUILDING HEIGHT: 50 FT

*SITE PLAN WILL FULLY COMPLY WITH ALL PROVISIONS OF THE UNION COUNTY DEVELOPMENT ORDINANCE

September 16, 2025

0 25 50 100 150 Feet

PREPARED BY:

PIKE
ENGINEERING

PREPARED FOR:

UnionPower
Cooperative

IMPACT STUDY
PROPOSED WINGATE SUBSTATION
UNION POWER COOPERATIVE

1424 MILLS HARRIS ROAD
WINGATE, UNION COUNTY, NORTH CAROLINA 28174

CONSULTATION REPORT

AS OF FEBRUARY 20, 2025

PREPARED FOR

Matt Baucom
Plant Development Engineer
Union Power Cooperative
1525 N. Rocky River Road
Monroe, NC 28110

PREPARED BY

Sarah E. Lak
Mark T. Lambert, MAI, AI-GRS

FORTENBERRY LAMBERT, INC.

1213 WEST MOREHEAD STREET, 5TH FLOOR

CHARLOTTE, NORTH CAROLINA 28208

(704) 375-1032

February 20, 2025

Matt Baucom

Plant Development Engineer
Union Power Cooperative
1525 N. Rocky River Road
Monroe, NC 28110

**RE: Impact Study for the Proposed Wingate Substation Located at 1424 Mills Harris Road,
Wingate, Union County, North Carolina 28174**

Dear. Mr. Baucom:

The subject of this consultation report is a portion of tax parcel 02202008 located at 1424 Mills Harris Road, Wingate, Union County, North Carolina 28174 (unincorporated portion). The entire property consists of 161.03 acres that is improved with a 26,600 SF Union County Sheriff's Department training facility that was constructed in 2017. The training facility is located on the northwestern portion of the site. Union Power Cooperative (UPC) is seeking to obtain a conditional rezoning and Special Use Permit (SUP) to lease 3.08 acres to construct a substation in the eastern portion of the site. We inspected the above-referenced subject property, and where possible, properties adjoining the site and the surrounding neighborhood. A sample of photographs taken during the inspection are included in the report.

As requested, we have prepared an Impact Study to determine whether UPC's proposed conditional rezoning and SUP (A) will or will not maintain or enhance the value of contiguous property; (B) whether or not the proposed use will violate the neighborhood character or adversely affect surrounding land uses; and (C) whether or not the proposed use will comply with the general plan for the physical development of the County as embodied in the Union County Unified Development Ordinance and/or in Union County's Future Land Use Plan.

Articles and books concerning substations and transmission lines concerning potential impact on surrounding properties were consulted and considered as part of this study.

One of the articles is "*Property Value Impacts from Transmission Lines, Subtransmission Lines, and Substations*" by Ted Tatos, Mark Glick, PhD, JD, and Troy A. Lunt, MAI, as published in The Appraisal Journal's Summer 2016 edition. Following is a portion of the peer reviewed article: The study focuses more on different types of transmission lines, but also includes substations in explaining the process of distributing power across long distances. It is explained that large towers, such as those that support 500 kV and 345kV lines are not omnipresent in population centers. Homes require voltages at much lower levels – 120 volts in the U.S. Therefore, interconnected transformers at transmission substations "step down" the power to subtransmission voltages of generally between 46 kV and 138 kV. These subtransmission lines, which are commonly located along highways or arterial roads, then carry bulk power from major substations to regional and local distribution substations, like that planned at the subject.

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The distribution stations are located close to consumers, which in turn step down the voltage again to between 2kV and 35kV. This is considered medium voltage. The findings from this study revealed mixed results on property values for transmission lines depending on its size. For substations, the results indicate marginal negative impact (-2.92%) at properties located within 50 meters (164 feet) and -0.38% for properties located 50 – 100 meters (164 ft. to 328 ft.). The study noted that other variables can and did affect results such as the health of the economy, demographics, and condition of the real estate market. Any negative impacts declined during the Great Recession and post-recession time frame. Other factors cited were regional employment, visibility, and supply and demand effects.

Another article published in the Appraisal Journal in Summer 2009 titled “*High-Voltage Transmission Lines: Proximity, Visibility, and Encumbrance Effects*” was considered. It was written by James A. Chalmers, PhD and Frank A. Voorvaart, PhD. This article did not cover substations, rather HVTL’s. The article states that there is a negligible effect, at best, usually in the range of 3% to 6%, and the effects decay rapidly as the distance to the lines increases, usually disappearing at about 200 feet to 300 feet. This article concludes that “the presence of transmission lines is apparently not given sufficient weight by buyers and sellers of real estate to have had any consistent, material effect on property values.” Since the proposed substation is smaller and less visible, it is reasonable to assume it also would have little impact.

Lastly, an article published in May 2019 for EMF Services, a professional EMF measurement and advisory service, covered the impact of Electromagnetic Fields (EMF). The article states that voltage from a power line or a substation produces an electric field that is exactly the same kind found in housing and home appliances. The strength of the magnetic field drops off with distance once one is 50 to 100 meters (164 to 328 feet) away. The article reports that after nearly 40 years of research, there is no clear indication that the magnetic fields, or some other factor to do with being near a power line has any effects on health. It is possible it could be other factors. It is states that magnetic fields at a substation boundary are generally little different for the levels found in many homes. It was clarified that if a power line crosses over the boundary that the magnetic fields will be larger there. It is the power lines, not the substation that generates the higher emission field.

A demographic study was prepared for the neighborhood surrounding the subject and compared to Union County and the MSA to assess the health of the neighborhood regarding population, households, median household income, and housing values over time, as these factors impact property values.

Historical home sales, acreage/farmland sales and prices for six Union Power substation properties that are similar as to what is proposed for the subject are provided in the report. Additionally, local real estate brokers active in the market were contacted to assist in understanding the real estate market in the area around the subject, and to gather their opinion as to any possible effect a substation could have in general and for the subject.

According to the proposed site plan, the proposed substation will be located at the site’s eastern border (approximately 2,500 feet north of Ansonville Road) and will maintain a large, wooded buffer along the perimeter. There is an existing 68-foot-wide Duke Energy right-of-way and transmission line that runs through the site.

The site immediately to the north of the proposed substation site is improved with a single-family residence and other structures. Using GIS Union County Mapping, it is estimated to be approximately 850 feet from the substation's northern boundary. Otherwise, the eastern portion of the subject where the substation will be located is surrounded primarily by wooded and agricultural land.

To obtain approval for a conditional rezoning and SUP, UPC must receive approval from the Union County Zoning Board of Adjustments based in part on five criteria. Based on our research, use of the site for the proposed substation will maintain or enhance the value of contiguous property, and will not violate the neighborhood character or adversely affect surrounding land uses; and will comply with the general plan for the physical development of the County as embodied in the Union County Development Ordinance and/or in the Future Land Use Plan.

Our opinions are based on the following Hypothetical Conditions and Extraordinary Assumptions.

Hypothetical Condition	None
Extraordinary Assumption	A conceptual site plan was provided for the proposed substation. It is assumed that Union Power Cooperative will meet all performance standards and that all zoning and/or governmental regulations will be met.

The conclusions are supported by the data and reasoning set forth in the attached narrative. The reader is referred to the Assumptions and Limiting Conditions, which are included in the Addenda of the report. We certify that we have no present or contemplated future interest in any properties included in this study. This report has been prepared in compliance with the Uniform Standards of Professional Appraisal Practice (USPAP) as approved by the Appraisal Standards Board of the Appraisal Foundation, and FIRREA Title XI, 12 CFR Part 34 (RTC).

Thank you for the opportunity to be of service, and if any information or clarification is needed, please do not hesitate to contact us.

Sincerely,



Sarah E Lak
North Carolina State Registered Trainee Appraiser #T5345

704-375-1032 x 705
sarah@fortenberrylambert.com



Mark T Lambert, MAI, AI-GRS
North Carolina State Certified General Appraiser #A3572

704-650-6271
mark@fortenberrylambert.com



EXECUTIVE SUMMARY

Property and Location	Proposed Wingate Substation 1424 Mills Harris Road Wingate, Union County, North Carolina 28174
Tax Parcel Identification	02202008
Property Ownership	Union County, North Carolina
Consultation Dates	
As Is Date	February 10, 2025
Report Date	February 20, 2025
Purpose of Consultation	Determine whether Union Power Cooperative's (UPC's) proposed conditional rezoning and SUP (A) will or will not maintain or enhance the value of contiguous property; (B) whether or not the proposed use will violate the neighborhood character or adversely affect surrounding land uses; and (C) whether or not the proposed use will comply with the general plan for the physical development of the County as embodied in the Union County Development Ordinance and/or in Union County's Future Land Use Plan.
Hypothetical Condition	None
Extraordinary Assumption	A conceptual site plan was provided for the proposed substation. It is assumed that Union Power Cooperative will meet all performance standards and that all zoning and/or governmental regulations will be met.
Land Area	The entire property is 161.03 acres, of which Union Power will lease 3.08 acres for a proposed substation.
Improvements	The site is improved with a 26,600 SF training facility that was constructed in 2017. The training facility was constructed for use by the Union County Sheriff's Department. The training facility is located on the northwestern portion of the site.
Zoning	RA-200CZ, Residential Agricultural Conditional Zoning, legally conforming As Is and Upon Completion of the substation, provided the owner is awarded a conditional zoning and SUP.
Flood Plain/Water Quality Buffers/Wetlands	FEMA Map Panel 3710547600J, dated October 16, 2008, located in Zones X and AE. A portion of the northern portion of the site is located in Zone AE. The proposed substation site is located in an area that is unencumbered by floodplain. A 30-foot stream buffer is located along both sides of Jack's Branch, which is located through the eastern portion of the site. Additionally, wetlands are located on the site. Based on the proposed site plan, the substation will not impact the existing buffer or wetlands.

FORTENBERRY LAMBERT, INC.

1213 WEST MOREHEAD STREET, 5TH FLOOR

CHARLOTTE, NORTH CAROLINA 28208

(704) 375-1032

EXECUTIVE SUMMARY CONTINUED

Property and Location

Proposed Wingate Substation
1424 Mills Harris Road
Wingate, Union County, North Carolina 28174

Highest & Best Use

As Vacant

As Improved

Hold for future low density residential or institutional development
Continued use of the existing improvements and to construct the proposed substation

Conclusion

Based on our research, use of the site for a proposed substation will maintain or enhance the value of contiguous property, and will not violate the neighborhood character or adversely affect surrounding land uses; and will comply with the general plan for the physical development of the County as embodied in the Union County Development Ordinance and/or in the Future Land Use Plan.

Consultants

Sarah E. Lak
#T5345

Mark T. Lambert, MAI, AI-GRS
NC #A3572



CERTIFICATION

I, Sarah E. Lak, certify that, to the best of my knowledge and belief,

1. The statements of fact contained in this report are true and correct.
2. The reported analyses, opinions and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, impartial and unbiased professional analyses, opinions, and conclusions.
3. I have no present or prospective interest in the property that is the subject of this report, and no personal interest with respect to the parties involved.
4. I have not performed previous services, as an appraiser or in any other capacity, regarding the property that is the subject of this report within the three-year period immediately preceding acceptance of this assignment.
5. I have no bias with respect to the property that is the subject of this report or to the parties involved with this assignment.
6. My engagement in this assignment was not contingent upon developing or reporting predetermined results.
7. My compensation for completing this assignment is not contingent upon the development or reporting of a predetermined value or direction in value that favors the cause of the client, the amount of the value opinion, the attainment of a stipulated result, or the occurrence of a subsequent event directly related to the intended use of this appraisal.
8. My analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the requirements of the Code of Professional Ethics & Standards of Professional Appraisal Practice of the Appraisal Institute, which include the *Uniform Standards of Professional Appraisal Practice*.
9. I have made a personal inspection of the property that is the subject of this report.
10. No one provided significant professional assistance to the person signing this report, other than those identified in the report. I have relied on surveys, floor plans, etc., provided by other professional persons who have been identified in the report.



Sarah E. Lak

North Carolina State Registered Trainee Appraiser #T5345

February 20, 2025

Date

FORTENBERRY LAMBERT, INC.

1213 WEST MOREHEAD STREET, 5TH FLOOR

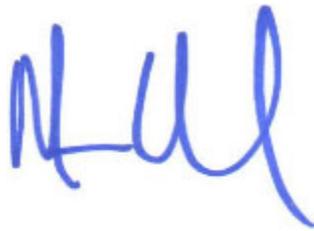
CHARLOTTE, NORTH CAROLINA 28208

PHONE: (704) 375-1032

CERTIFICATION

I, Mark T. Lambert, MAI, AI-GRS, certify that, to the best of my knowledge and belief,

1. The statements of fact contained in this report are true and correct.
2. The reported analyses, opinions and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, impartial and unbiased professional analyses, opinions, and conclusions.
3. I have no present or prospective interest in the property that is the subject of this report, and no personal interest with respect to the parties involved.
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8. My analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the requirements of the Code of Professional Ethics & Standards of Professional Appraisal Practice of the Appraisal Institute, which include the *Uniform Standards of Professional Appraisal Practice*.
9. I have made a personal inspection of the property that is the subject of this report.
10. No one provided significant professional assistance to the person signing this report, other than those identified in the report. I have relied on surveys, floor plans, etc., provided by other professional persons who have been identified in the report.
11. The use of this report is subject to the requirements of the Appraisal Institute relating to review by its duly authorized representatives.
12. As of the date of this report, Mark T Lambert, MAI, AI-GRS, has completed the continuing education program for Designated Members of the Appraisal Institute.



Mark T. Lambert, MAI, AI-GRS

North Carolina State Certified General Appraiser #A3572

February 20, 2025

Date

FORTENBERRY LAMBERT, INC.

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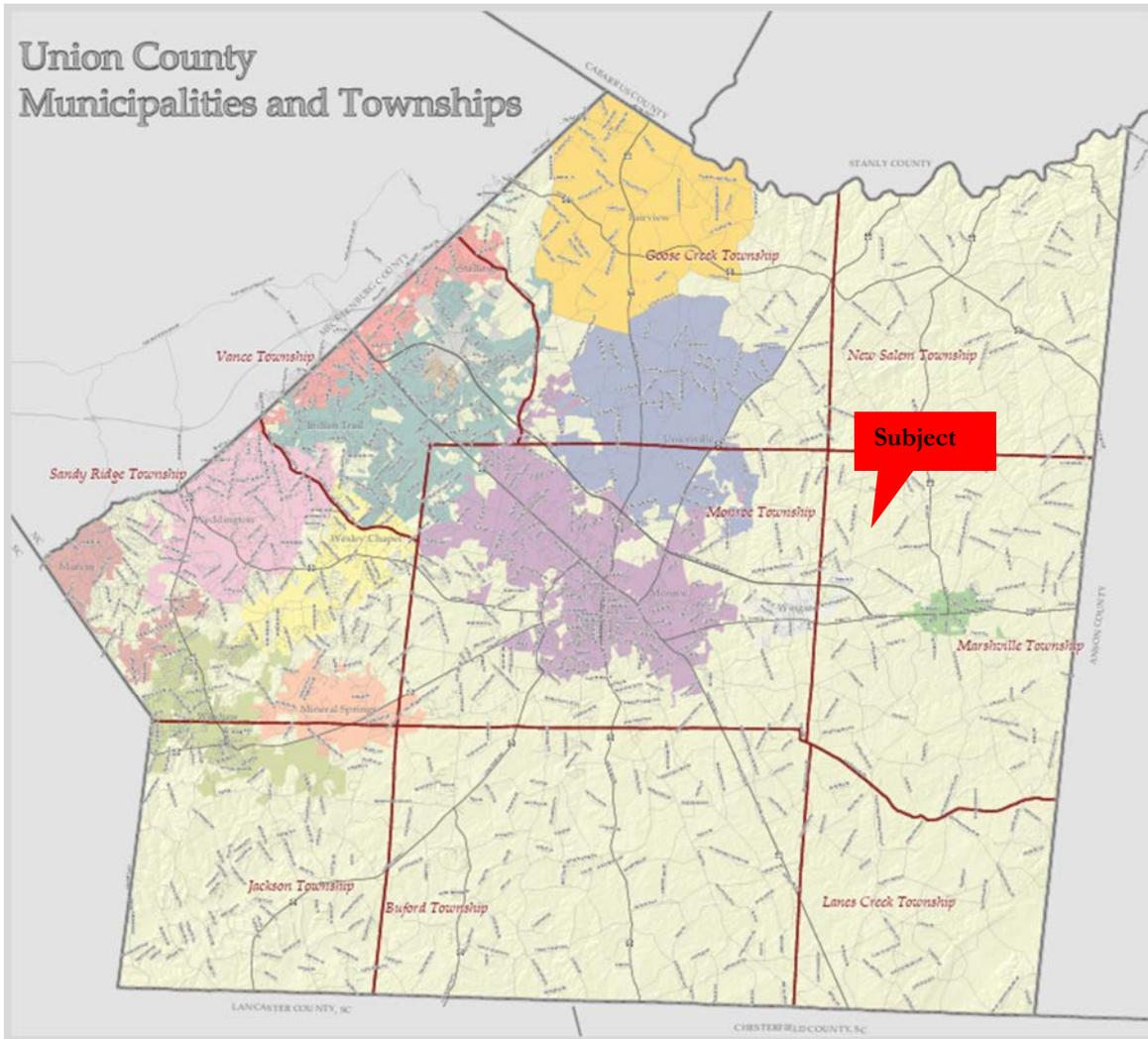
CHARLOTTE, NORTH CAROLINA 28208

PHONE: (704) 375-1032

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UNION COUNTY MAP



PROPERTY IDENTIFICATION/CONSULTING PREMISE

The subject of this consultation report is a portion of tax parcel 02202008 located at 1424 Mills Harris Road, Wingate, Union County, North Carolina 28174 (unincorporated portion). The entire property consists of 161.03 acres that is improved with a 26,600 SF Union County Sheriff's Department training facility that was constructed in 2017. The training facility is located on the northwestern portion of the site. Union Power Cooperative (UPC) is seeking to obtain a conditional rezoning and Special Use Permit (SUP) to lease 3.08 acres to construct a substation in the eastern portion of the site. The site plan provided by the Client for the proposed substation is below:

PROPOSED WINGATE SUBSTATION SITE PLAN



GENERAL INFORMATION

Client	Union Power Cooperative
Intended User	Client
Intended Use	Determine whether Union Power Cooperative’s (UPC’s) proposed conditional rezoning and SUP (A) will or will not maintain or enhance the value of contiguous property; (B) whether or not the proposed use will violate the neighborhood character or adversely affect surrounding land uses; and (C) whether or not the proposed use will comply with the general plan for the physical development of the County as embodied in the Union County Development Ordinance and/or in Union County’s Future Land Use Plan.
Report Format	Consultation Report
Prior Services	The appraisers have not performed prior consultant services on this property within the 5-year period immediately preceding acceptance of this assignment.
Competency	Mark T. Lambert, MAI, AI-GRS is a State Certified General Real Estate Appraiser in North and South Carolina. Mr. Lambert has approximately 35 years of experience, including numerous residential/institutional/agricultural properties. Sarah E. Lak is a State Registered Trainee Appraiser in North Carolina and has been appraising residential and commercial properties for approximately 12 years. The appraisers meet the USPAP Competency Rule requirements.

RELEVANT DATES

The following are the relevant dates of the impact study.

As Is Date	February 10, 2025
Date of Report	February 20, 2025

DEFINITIONS

Hypothetical Condition and Extraordinary Assumptions

The *Uniform Standards of Appraisal Practice (USPAP)* defines a **Hypothetical Condition** as:

“that which is contrary to what exists but is supposed for the purpose of analysis.”

Hypothetical conditions assume conditions contrary to known facts about physical, legal, or economic characteristics of the subject or about conditions external to the property, or about the integrity of data used in an analysis.

USPAP defines an **Extraordinary Assumption** as:

“an assumption, directly related to a specific assignment, which, if found to be false, could alter the appraiser’s opinions or conclusions.”

Extraordinary assumptions presume as fact otherwise uncertain information about physical, legal, or economic characteristics of the subject property; or about conditions external to the property.

Hypothetical Condition Used	None
Extraordinary Assumption Used	A conceptual site plan was provided for the proposed substation. It is assumed that Union Power Cooperative will meet all performance standards and that all zoning and/or governmental regulations will be met.

SCOPE OF WORK

The scope, or the extent of the analysis, includes the following:

- *Physical inspection of the subject site and neighborhood;*
- *Inspection of selected comparable local properties;*
- *Site analysis including physical and legal characteristics;*
- *Highest and best use analysis, as vacant and improved, if applicable;*
- *Study of local assessed value history of subject and surrounding properties;*
- *Study of historical aerial photos of the subject and surrounding properties to look for development trends;*
- *Study of historical property values surrounding the subject and in the area;*
- *Review of various articles and publications concerning impacts of substations on nearby development, and;*
- *Inspection of a sample of other Union Power Cooperative substations. Review of information provided by Union County Cooperative of other similar substations that are similar to that which is proposed.*

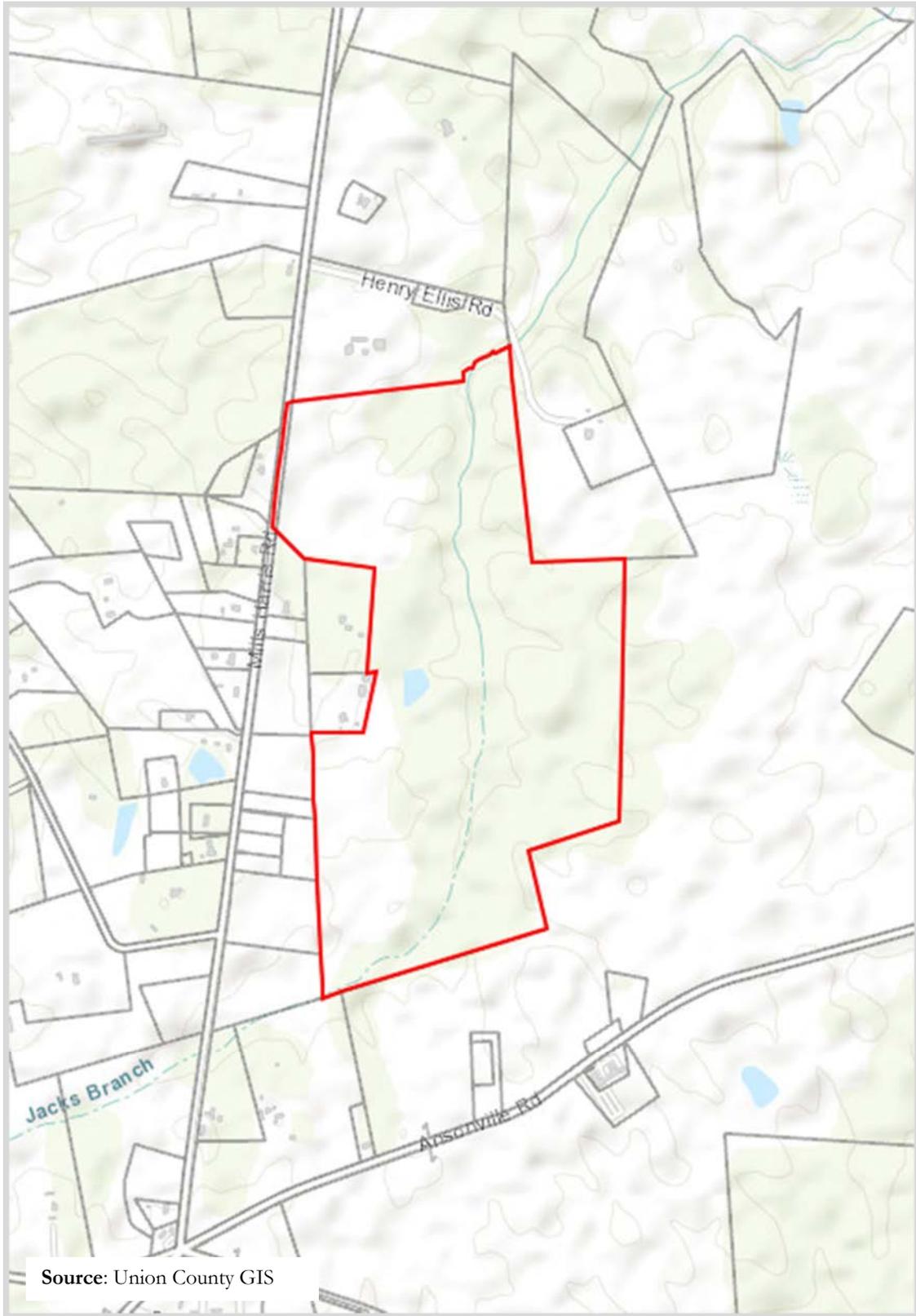
Additional primary research may have been conducted with the property, depending on the requirements of the assignment.

OWNERSHIP HISTORY

According to the Union County Public Registry and Tax Assessor data, the most recent transaction involving the subject property is as follows:

Current Owner of Record	Union County, North Carolina
Most Recent Transaction Date	January 14, 2011
Buyer	Union County, North Carolina
Seller	H & T, LLC, a North Carolina limited liability company
Deed Reference	Book 5476, Page 914
Price Indicated by Excise Stamps	\$1,161,000
Prior Transaction	None
Pending Transactions	None
Current Listing Agreements	None

TAX MAP



AERIAL TAX MAP

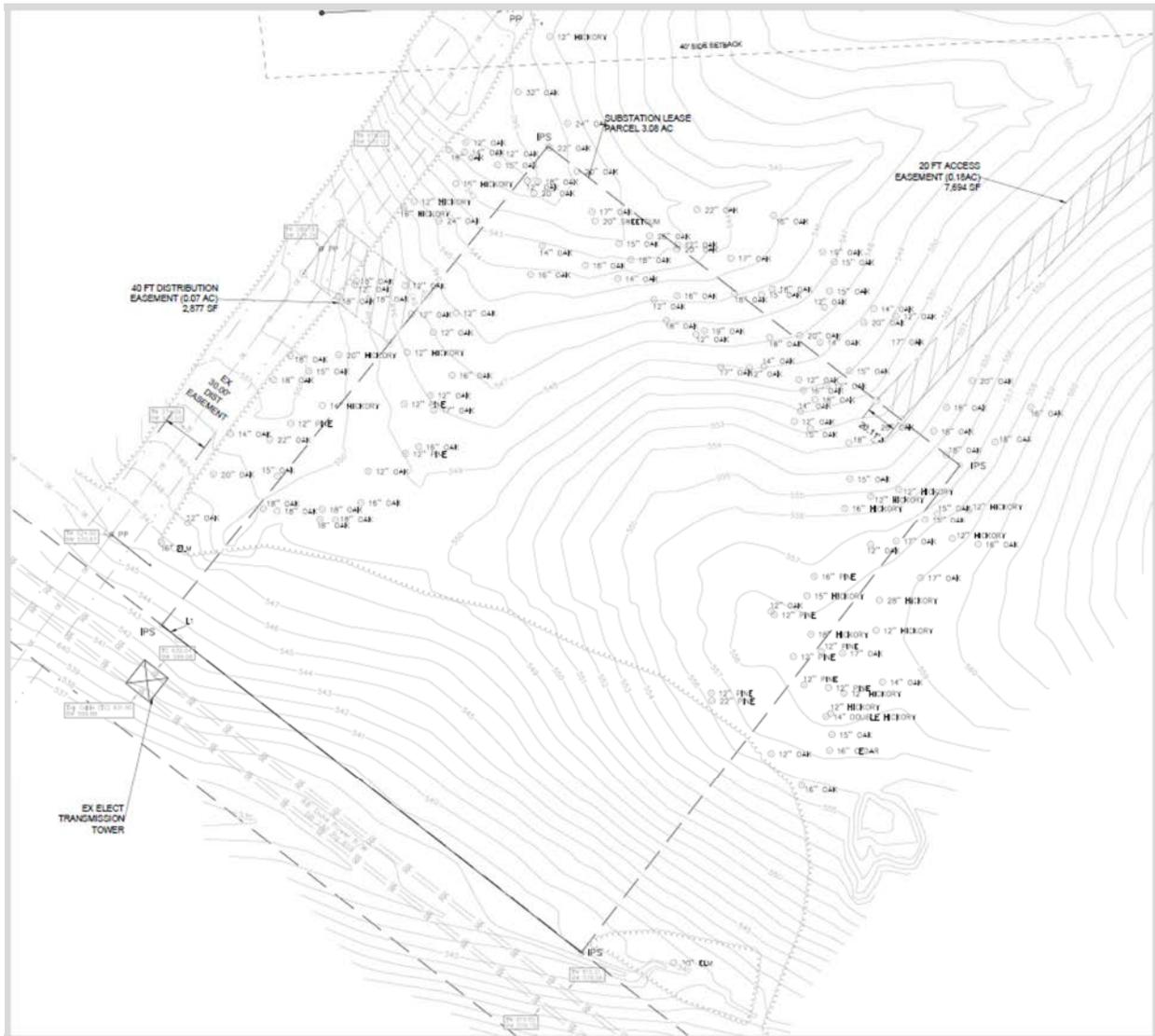


Source: Union County GIS

FEMA FLOOD HAZARD MAP



PROPOSED SITE PLAN – WINGATE SUBSTATION (TOPOGRAPHICAL)



PROPOSED SITE PLAN – WINGATE SUBSTATION (AERIAL)



SITE ANALYSIS

General	
Information for the subject is based on a review of tax maps, aerial maps, Union County GIS information, FEMA floodplain maps, proposed site plans provided by the Client, and a personal inspection.	
Location	1424 Mills Harris Road Wingate, Union County, North Carolina 28174 (Unincorporated portion)
Tax Parcel	02202008
Current Use	Institutional/Government
Improvements	The site is improved with a 26,600 SF training facility that was constructed in 2017. The training facility was constructed for use by the Union County Sheriff's Department. The training facility is located on the northwestern portion of the site.
Land Area	The entire property is 161.03 acres, of which Union Power will lease 3.08 acres for a proposed substation.
Zoning	RA-200CZ – Residential Agricultural Conditional Zoning by the Union County Unified Development Ordinance
Shape	Irregular and functional
Frontage/Access	Approximately 900 feet on Mills Harris Road
Topography	Gently Sloping
Floodplain/Water Quality Buffers/Wetlands	FEMA Map Panel 3710547600J, dated October 16, 2008, located in Zones X and AE. A portion of the northern portion of the site is located in Zone AE. The proposed substation site is located in an area that is unencumbered by floodplain. A 30-foot stream buffer is located along both sides of Jack's Branch, which is located through the eastern portion of the site. Additionally, wetlands are located on the site. Based on the proposed site plan, the substation will not impact the existing buffer or wetlands.
Soil & Environmental Concerns	No environmental reports were provided. The values reported are based on the assumption that the subject site meets all Environmental Protection Agency requirements and regulations.
Utilities	Private Well/Septic System
Easements & Encroachments	An existing 68-foot-wide Duke Power right-of-way extends from the site's southeastern boundary to the site's northwestern boundary along Mills Harris Road. Upon completion of the proposed substation, a 20-foot permanent access easement (PAE) totaling 7,694 SF will extend from the site's eastern boundary to the proposed substation site. Additionally, a 40-foot permanent distribution easement (PDE) totaling 2,877 SF will be located on the northwestern side of the proposed substation site adjacent to the existing 30-foot-wide PDE.

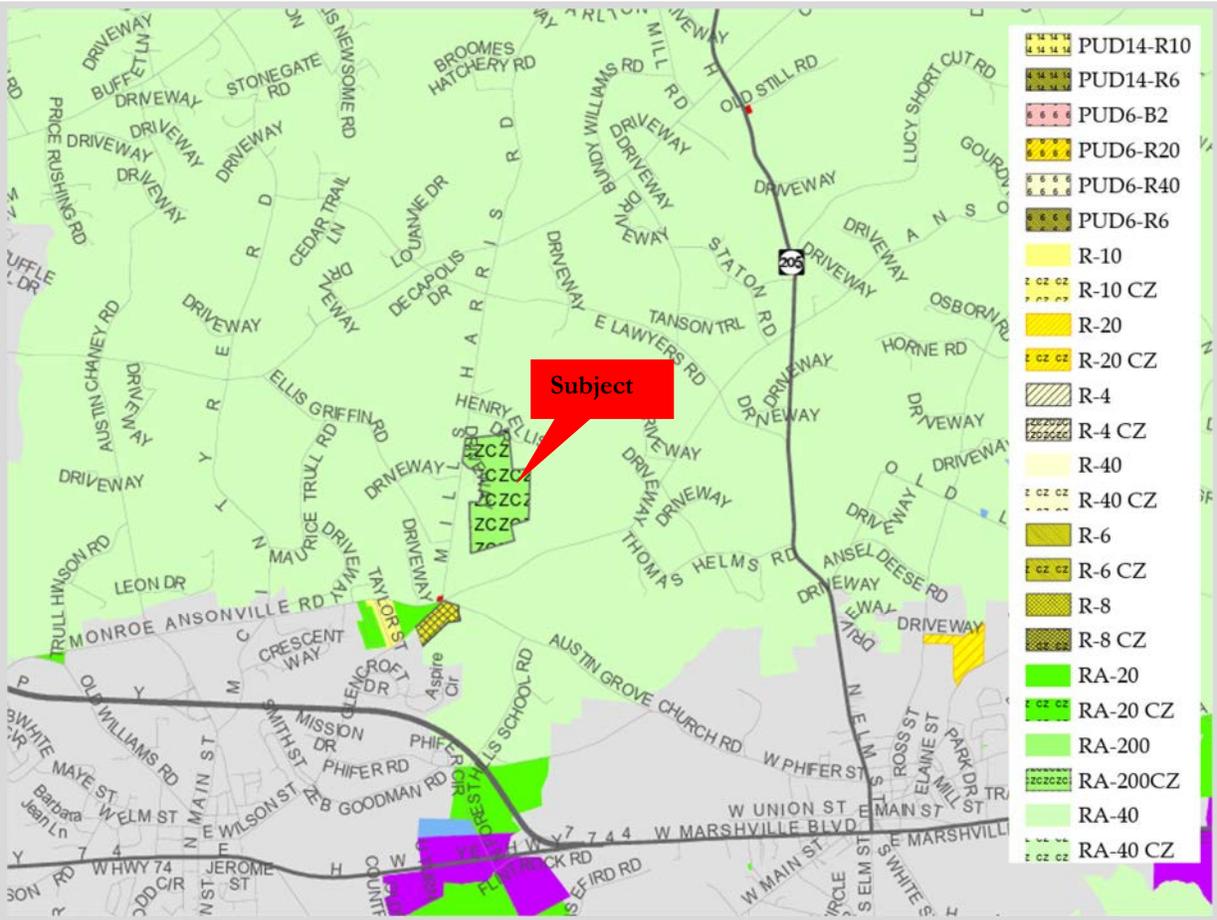
Site Analysis, Continued

Conclusion	<p>The subject is located approximately 7 miles northeast of Monroe in the unincorporated portion of Union County. The site has good access and road frontage. Public water and sewer is not accessible at the site. The site is irregular shaped with gently sloping topography. A portion of the northern portion of the site is located in Zone AE. The proposed substation site is located in an area that is unencumbered by floodplain. A 30-foot stream buffer is located along both sides of Jack's Branch, which is located through the eastern portion of the site. Additionally, wetlands are located on the site. Based on the proposed site plan, the substation will not impact the existing buffer or wetlands. An existing 68-foot-wide Duke Power right-of-way extends from the site's southeastern boundary to the site's northwestern boundary along Mills Harris Road. This area is improved with several high tension towers and a transmission line. Upon completion of the proposed substation, a 20-foot permanent access easement (PAE) totaling 7,694 SF will extend from the site's eastern boundary to the proposed substation site. Additionally, a 40-foot permanent distribution easement (PDE) totaling 2,877 SF will be located on the northwestern side of the proposed substation site adjacent to the existing 30-foot-wide PDE.</p>
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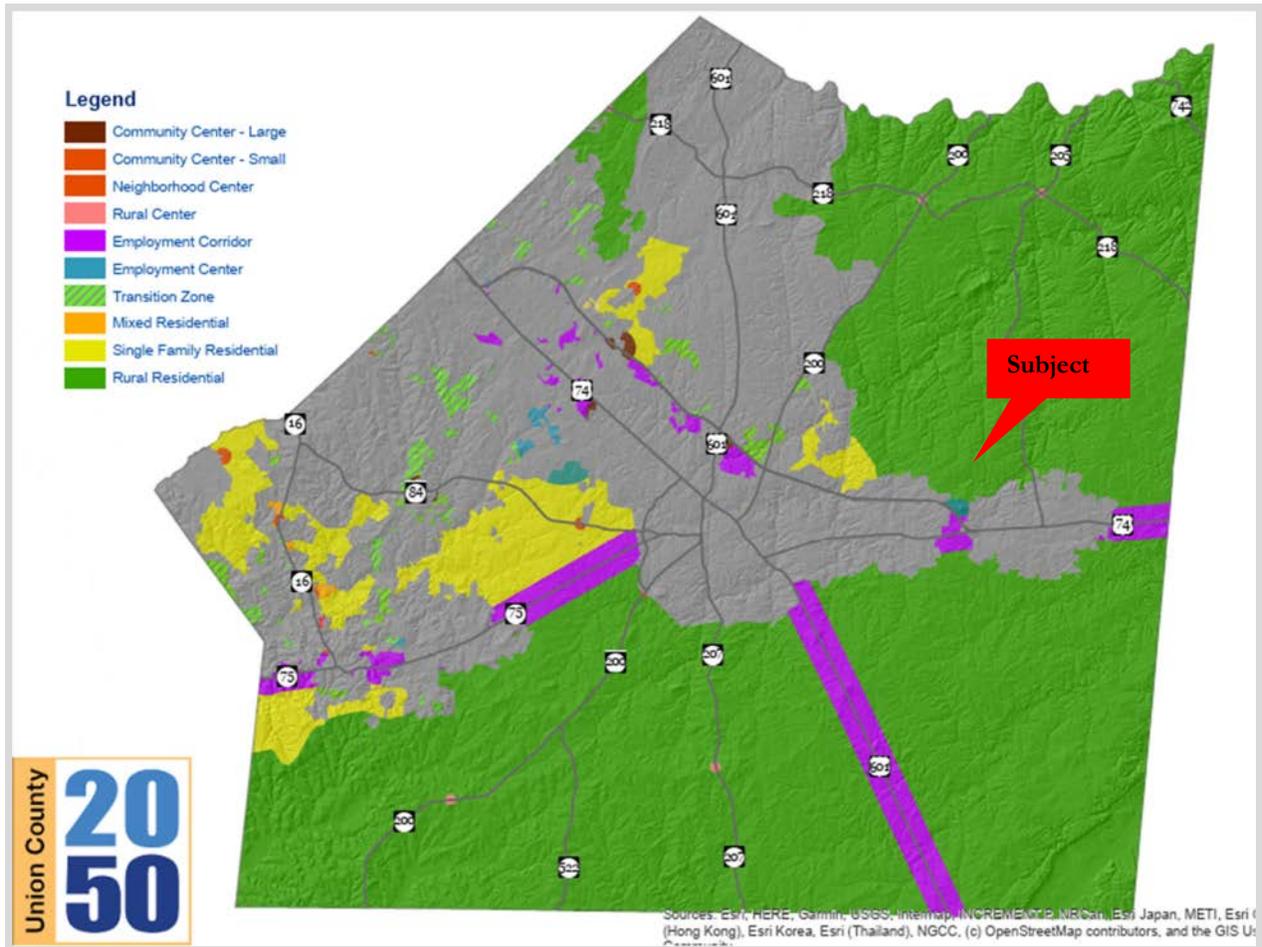
ZONING MAP



EXISTING ZONING MAP FOR SUBJECT AREA



ADOPTED UNION COUNTY 2050 LAND USE MAP



ZONING/LAND USE CONTROL

The subject is zoned RA-200CZ – Residential Agricultural Conditional Zoning by the Union County Unified Development Ordinance (UDO). The RA-200 district is primarily intended for residential, agricultural, and institutional users. According to the Union County UDO,

“The RA-200 district is primarily intended to accommodate agriculture and agriculture-related uses and very low-density residential development in rural areas of the county. The district is generally intended to apply in areas where central water and/or central sewer service is not widely available.”

**Development Standards
RA-200, Residential Agricultural District**

<u>Standard</u>	<u>RA-200/Subject</u>
Minimum Lot Area SF	200,000
Minimum Lot Width	60 Feet
Minimum Front Yard	40 Feet
Minimum Side Yard	15 Feet
Minimum Rear Yard	40 Feet
Maximum Building Height	50 Feet

Source: *Union County UDO & Provided Site Plan*

The existing improvements represent a legal, conforming use.

Union Power Cooperative (UPC) is applying for a Special Use Permit (SUP) in order to construct the proposed substation (classified as a major utility or public service facility), which is considered a special use according to Article 25.010-B, page 25-2 in the UDO, as illustrated in the table below. Once the SUP is obtained, the proposed substation will be considered a legal, conforming use.

USE CATEGORY	RA 200	RA 40	RA 20	R 40	R 20	R 15	R 10	R 8	R 6	R 4	O	B 2	B 3	B 4	H C	L I	H I	Supplemental Regulations
Subcategory Specific use																		
Postal Service	-	-	-	-	-	-	-	-	-	-	P	P	P	P	P	P	P	
Religious Assembly	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	-	-	
Safety Service	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	
School	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	
Utility or Public Service Facility																		
Minor	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	
Major	S	S	S	S	S	S	S	S	S	S	S	S	S	S	S	S	S	P
Renewable Energy Facility	S	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	<i>(amended 1.16.18)</i>

Section 25.020-C: Public, Civic and Institutional Use Category

15. Utility or Public Service Facility

Any above-ground structures or facilities (other than buildings, unless such buildings are used as storage incidental to the operation of such structures or facilities) owned by a governmental entity, a nonprofit organization, corporation, or any entity defined as a public utility for any purpose by NCGS 62-3(23) and used in connection with the production, generation, transmission, delivery, collection, or storage of water, sewage, electricity, gas, oil, or electronic signals

a. Minor

Utility or public service facilities that need to be located in or close to the area where the service is provided. Minor utilities and public service facilities generally do not have regular employees at the site and typically have few if any impacts on surrounding areas. Typical uses include water and sewer pump stations; gas regulating stations; electric transformers; water conveyance systems; stormwater facilities and conveyance systems; telephone switching equipment and emergency communication warning/broadcast facilities.

b. Major

Utility and public service facilities that are not classified as "minor" or as a "renewable energy facility". Typical uses include but are not limited to water and wastewater treatment facilities, high-voltage electric substations, utility-scale power generation facilities (excluding renewable energy facilities), and utility-scale water storage facilities, such as water towers. (amended 1-6-2018)

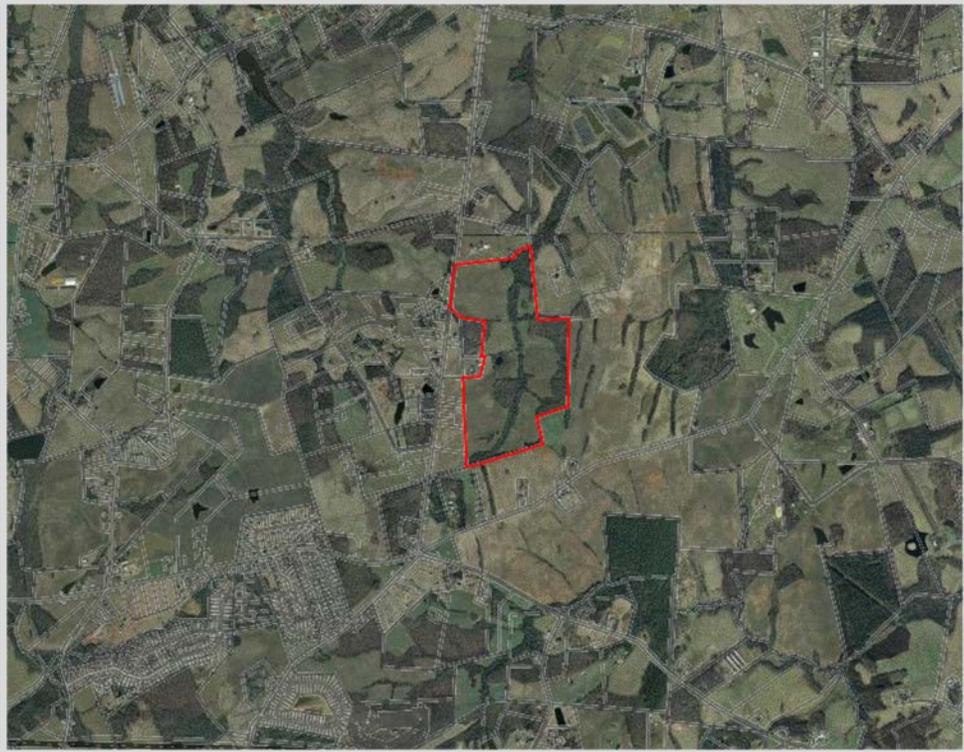
There are five "Considerations"/Findings of Fact that must be met to satisfy the Board of Adjustment in order to grant the property owner a SUP. Those are outlined later in the Conclusion section of the report.

The immediate area around the subject is currently rural in nature, and the 2050 Future Land Use Map designates this area as Rural Residential. The area surrounding the subject is primarily rural in nature, with some homes on larger lots and large tracts of agricultural land. There is a large amount of vacant land in the immediate area. The following pages show historical maps of the area from 2007 to 2021 that demonstrate the slow growth that has occurred over time. The maps are taken from Union County GIS.

2007 AERIAL MAP



2010 AERIAL MAP



2015 AERIAL MAP



2021 AERIAL MAP



DESCRIPTION OF THE PROPOSED SUBSTATION

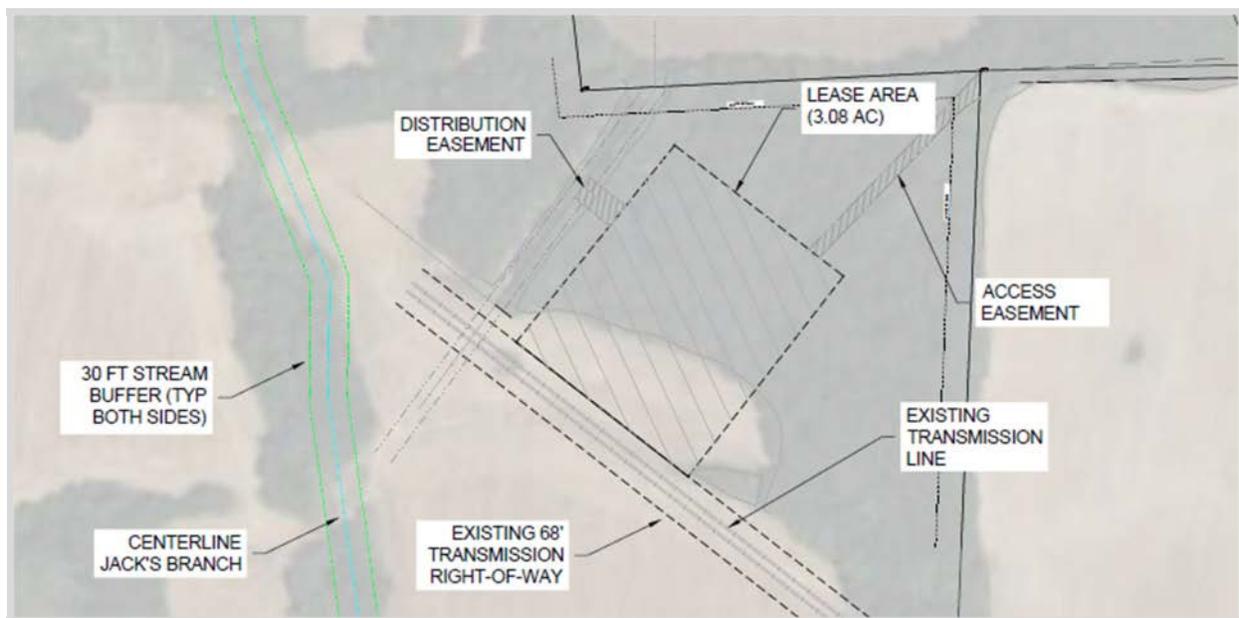
Based on information provided by the Client and Pike Engineering, the substation will meet all dimensional requirements, such as minimum setbacks, lot size and maximum building height of 50 feet. Many of the existing trees will be preserved.

Substation materials will consist primarily of galvanized metal, while the control enclosure will have an aggregate finish. No buildings or structures capable of human occupation or storage will be constructed on the site. A VFP Control Enclosure will be installed within the fenced substation. The control enclosure will house “remote switching” and monitoring controls for the substation equipment.

A farm gate will be installed to prevent local traffic from entering the property. Gates to the property will be locked at all times. Security fencing will surround the substation infrastructure. The fencing will consist of woven steel fabric (minimum height of 7 feet) with additional barbed wire extension arms (1 foot in length) on top. There will also be signage to the effect of “Danger! High Voltage.”

Electromagnetic field (EMF) and noise levels are not expected to exceed the ambient levels found outside the substation property. Following is a proposed site plan map.

PROPOSED WINGATE SUBSTATION SITE PLAN



Photos of the subject, as well as a sample of surrounding properties, are provided on the following pages to provide a visual example.

SUBJECT PHOTOS



VIEW OF PROPOSED SUBSTATION SITE



VIEW OF PROPOSED SUBSTATION SITE



VIEW OF PROPOSED SUBSTATION SITE



VIEW OF PROPOSED SUBSTATION SITE



VIEW OF PROPOSED SUBSTATION SITE



VIEW OF PROPOSED SUBSTATION SITE

PHOTOS OF ADJACENT PROPERTIES



VIEW OF ADJACENT FARMLAND TO SE &
EXISTING DUKE POWER ROW



VIEW OF ADJACENT FARMLAND TO SE &
EXISTING DUKE POWER ROW



VIEW OF ADJACENT FARMLAND TO NE



VIEW OF ADJACENT FARMLAND TO SE &
EXISTING DUKE POWER ROW

SAMPLE PHOTOS OF PROPERTIES IN NEIGHBORHOOD



VIEW OF UNION COUNTY SHERIFF'S OFFICE TRAINING CENTER (PORTION OF SUBJECT/ENTIRE SITE)



VIEW OF CHURCH LOCATED ACROSS ANSONVILLE ROAD TO THE SOUTH



VIEW OF RESIDENCE IN NEIGHBORHOOD



VIEW OF RESIDENCES IN NEIGHBORHOOD



VIEW OF RESIDENCE/FARMLAND IN NEIGHBORHOOD



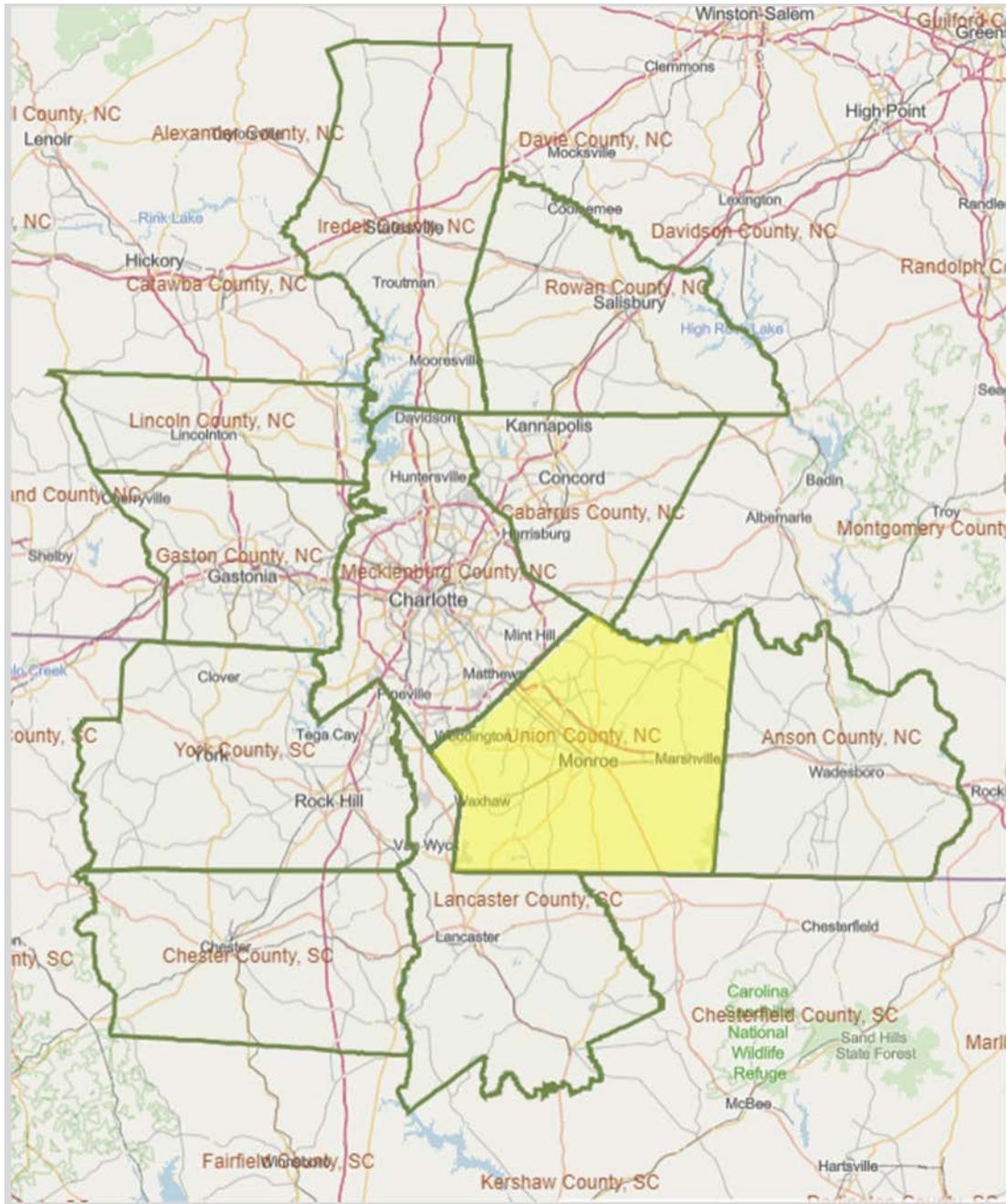
VIEW OF FARMLAND IN NEIGHBORHOOD

**CHARLOTTE AREA/UNION COUNTY
REGIONAL ANALYSIS**

LOCATION AND ACCESS

The subject is located in Union County, North Carolina, within the Charlotte-Concord-Gastonia Metropolitan Statistical Area (MSA). The MSA is comprised of 11 counties centered on the City of Charlotte and located on the North Carolina-South Carolina border.

CHARLOTTE-CONCORD-GASTONIA MSA



A primary driver of the Charlotte economy is its connectivity. Interstate 85 provides access southwest to Greenville-Spartanburg and Atlanta, and northeast to Greensboro and Raleigh-Durham and I-95. Interstate 77 connects south to Columbia, SC and I-26, which runs southeast to Charleston, SC. To the north, I-77 connects to I-40 at Statesville, NC and to I-81 in Virginia. Interstate 40 also connects west to the Asheville area and western NC. Interstate 277 is a 4.5-mile loop that encircles Charlotte's central business district. Further out is I-485, which is 67 miles in length and connects to I-77, I-85 and several of Charlotte's ring suburbs. Primary US Highways bisect the region and include US Highways 21, 29, 74, 321, 521, and 601.

The Charlotte Area Transit System (CATS) operates bus service to surrounding suburban communities in both North and South Carolina. CATS also operates the LYNX light rail. Currently, the system consists of the Blue Line, connecting Pineville in the south to UNC Charlotte in the northeast, running through the CBD, totaling 19 miles. The newest part of the LYNX network is the Gold Line, which is a 10-mile streetcar line being completed in phases. Currently, the line is 4 miles with 17 stops, running from Sunnyside Avenue, south along Hawthorne Lane to 5th Street, at Novant Hospital, and then west to the Johnson C Smith University Campus and the historic West End.

CATS is currently in the planning and design stages for the Lynx Silver Line, a multibillion-dollar east-west light rail line that will run from Matthews through Uptown Charlotte and west to Charlotte Douglas International Airport and across the Catawba River to Belmont. The line, projected to open in 2030, will connect to the Blue Line at 11th Street and the future intermodal Charlotte Gateway Station.

Charlotte-Douglas International Airport, located in western Mecklenburg County, is the region's center for air travel and consistently ranked as one of the top 10 busiest airports in the world. Service is provided to 178 nonstop destinations, including international locations. Norfolk Southern Railway, which has an intermodal facility at the airport, and CSX Transportation link over 40,000 miles of rail between Charlotte and 23 eastern states.

DEMOGRAPHIC TRENDS

According to the 2020 US Census, the Charlotte MSA is the 23rd-largest in the US and the largest in the Carolinas. Charlotte is consistently among the fastest growing cities in the US. The following table outlines key demographic data for Charlotte, Mecklenburg County, and the MSA:

Demographic Summary

	City of Charlotte	Mecklenburg County	Charlotte- Concord- Gastonia MSA
<u>Population</u>			
2029 Projection	991,373	1,258,917	3,026,237
2024 Estimate	930,043	1,190,061	2,851,936
2020 Census	875,493	1,115,482	2,660,329
2010 Census	732,641	919,622	2,243,837
Annual % Change 2010-2024	1.7%	1.9%	1.7%
Projected Annual % Change 2020-2029	1.4%	1.4%	1.4%
<u>Households</u>			
2029 Projection	414,463	519,126	1,198,368
2024 Estimate	382,320	483,450	1,116,721
2020 Census	355,758	448,814	1,034,018
2010 Census	290,446	362,211	858,450
Annual % Change 2010-2024	2.0%	2.1%	1.9%
Projected Annual % Change 2020-2029	1.7%	1.6%	1.7%
2024 Average Household Size	2.4	2.5	2.6
<u>Median Household Income</u>			
2029 Projection	\$96,047	\$102,738	\$96,271
2024 Estimate	\$80,421	\$85,845	\$81,494
Projected Annual % Change 2024-2029	3.6%	3.7%	3.4%
<u>Median Owner-Occupied Housing Values</u>			
2029 Projection	\$489,589	\$387,284	\$447,193
2024 Estimate	\$422,005	\$352,399	\$373,787
Projected Annual % Change 2024-2029	3.0%	1.9%	3.7%
<u>Housing Summary</u>			
2024 Owner-Occupied	50.9%	51.0%	61.2%
2024 Renter-Occupied	42.6%	42.3%	32.2%
% Vacant	6.6%	6.7%	6.7%
Source: US Census Bureau, Census 2010 and 2020. <i>ESRI</i> estimates and forecasts for 2024 and 2029.			

The MSA, County and City are projected to have consistent population growth of 1.4% over the next 5 years. The following map shows projected population growth on the Census Tract level from 2024 to 2029. Although the entire area is growing, much of the population increases are centered on the urban core, following Charlotte’s light rail to the north and south of the CBD, shown in the blue-green colors. Other pockets of high growth are SW Mecklenburg County and central Iredell County (Mooresville), as well as the I-85 corridor to the northeast. Generally, moving out from central Charlotte, growth tends to be slower in the outlying areas of the surrounding counties.

recovered to less than 5.0% 12 months later. The following table outlines employment trends (annual averages) for the MSA:

Charlotte MSA Employment Trends

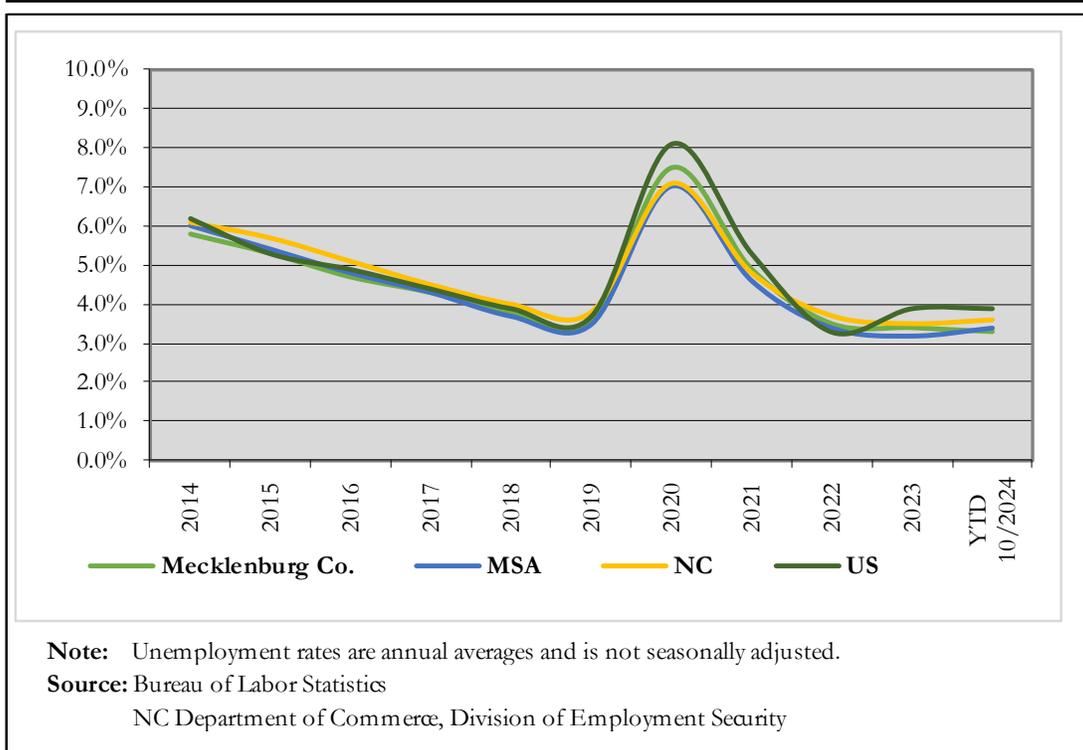
<u>Year</u>	<u>Employment</u>	<u>Growth (Jobs)</u>	<u>% Change</u>	<u>Unemployment Rate</u>
2019	1,299,595	86,479	2.8%	3.8%
2020	1,237,468	-62,127	-4.8%	3.5%
2021	1,296,980	59,512	4.8%	7.3%
2022	1,377,095	80,115	6.2%	4.6%
2023	1,458,158	81,063	5.9%	3.2%
5- Year Annual Average	1,333,859	49,008	3.0%	4.5%
YTD October 2024	1,481,702	23,544	1.6%	3.4%

Notes: Annual data is the 12-Month Average for each year, unadjusted.
 % Change for October 2024 is from 2023 average.

Source: NC Employment Security Commission

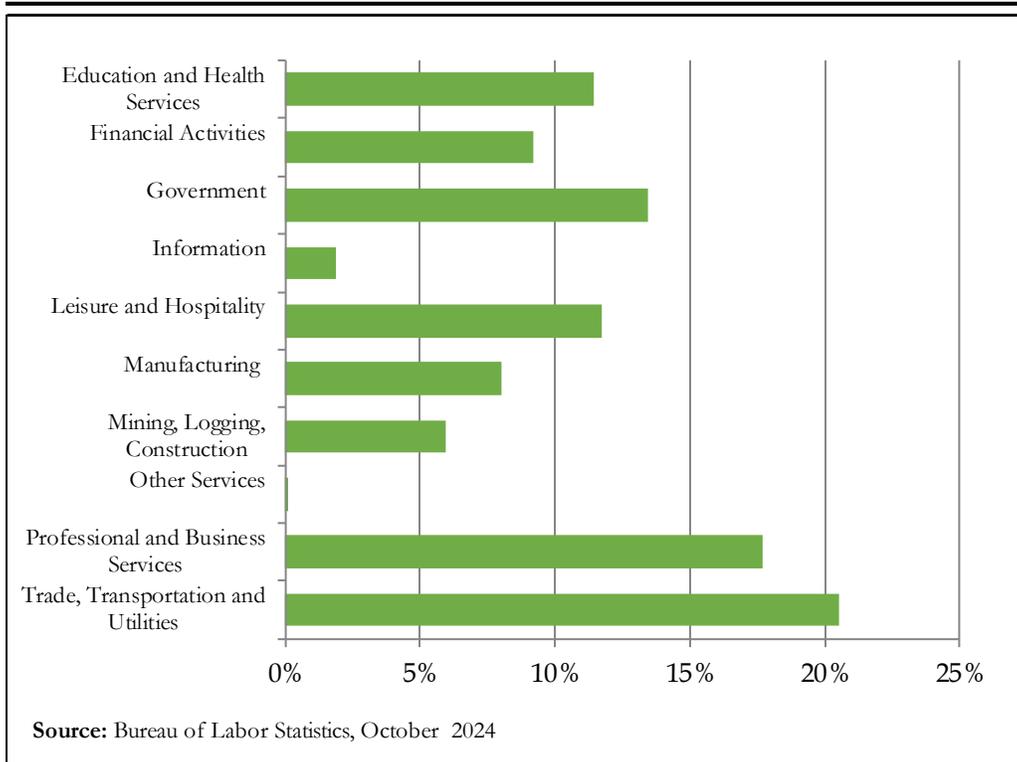
Unemployment for the MSA and Mecklenburg County have typically remained below national averages, which is currently the case. The most recent rates (October 2024) are 3.3% to 3.4% for Mecklenburg County and the MSA, respectively. Unemployment spiked in the US, State, County and MSA in 2020, with rates in the 7% to 8% range. Historical unemployment rates are compared in the following graph:

10-Year Unemployment Rate Comparison



Charlotte’s regional economy is diversified among the financial, manufacturing, trade, services and government sectors. As shown in the following graph, the Trade, Transportation and Utilities sector of the economy has the largest proportionate share of employed workers.

**Employment by Industry, Proportionate Share
Charlotte MSA**



There are 18 Fortune 1000 headquarter locations in the Charlotte area, and over 300 Fortune 500 companies represented in the area. Following is a list of the Fortune 1000 companies headquartered in the region:

Charlotte-Area Fortune 1000 Headquarters

Rank	Company	Rank	Company	Rank	Company
18	Bank of America	296	Sonic Automotive	678	JELD-WEN
49	Lowe's	412	Albemarle	734	Brighthouse Financial
102	Nucor	503	CommScope	751	Dentsply Sirona
114	Honeywell	514	Ingersoll Rand	760	RXO
132	Truist	532	Coca Cola Consolidated	919	Curtiss-Wright
148	Duke Energy	603	Sealed Air		

Source: Charlotte Regional Business Alliance

Charlotte is a primary banking center for the US, with almost 120,000 employees in the financial activities sector. Charlotte is the home for a branch of the US Federal Reserve and headquarters for

Bank of America. Wells Fargo bank has its regional headquarters in Charlotte. Following is a list of Mecklenburg County’s largest non-governmental employers.

**Mecklenburg County
Top 10 Largest Non-Governmental Employers**

<u>Company</u>		<u>Company</u>	
1	Atrium Health	6	Charter Communications
2	Wells Fargo	7	Novant
3	Bank of America	8	Presbyterian Hospital
4	Amazon	9	Universal Protection Service
5	American Airlines	10	Harris-Teeter

Source: NC Department of Commerce, 2nd Q 2024 data.

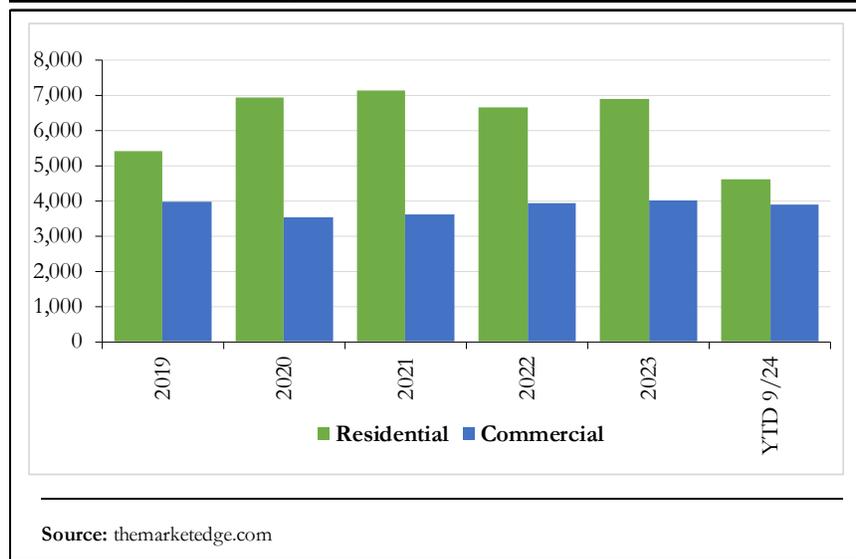
Manufacturing has historically been a key element of Charlotte's economy. The region’s manufacturers are in many different fields, including non-electrical and electrical machinery, metal working and chemicals. Major manufacturers in the MSA represent every major NAICS category. The Charlotte Chamber and Regional Partnership have placed emphasis on high-tech, biotech and other knowledge-based industries. An example is the continuing expansion of the 350-acre North Carolina Research Campus (NCRC), located in Kannapolis, which focuses on biotechnology related to food and nutrition. The NCRC includes several university-run research facilities and will have over 1 million SF of lab space when completed.

REAL ESTATE

Residential

Historically, Charlotte’s growth in employment and population has created an ongoing demand for new housing, and residential building activity has kept pace with the growth. The most-recent building permit activity in Mecklenburg County (through September 2024) is shown on the accompanying graph:

5-Year New Building Permit Trends Mecklenburg County



Charlotte has historically had a very active residential transaction market. The following graphic outlines recent key statistics for the Charlotte region, provided by the Charlotte Regional Realtor Association’s MLS service (Canopy):

Charlotte Region MLS Statistics

Key Metrics	October			Year to Date		
	2023	2024	Percent Change	Thru 10-2023	Thru 10-2024	Percent Change
New Listings	4,179	4,481	+ 7.2%	42,805	48,214	+ 12.6%
Pending Sales	3,012	3,722	+ 23.6%	36,637	36,842	+ 0.6%
Closed Sales	3,295	3,352	+ 1.7%	35,780	35,197	- 1.6%
Median Sales Price*	\$380,000	\$395,000	+ 3.9%	\$379,990	\$394,000	+ 3.7%
Average Sales Price*	\$465,609	\$492,068	+ 5.7%	\$463,196	\$496,300	+ 7.1%
Percent of Original List Price Received*	97.4%	95.9%	- 1.5%	97.3%	97.0%	- 0.3%
List to Close	81	88	+ 8.6%	87	85	- 2.3%
Days on Market Until Sale	32	41	+ 28.1%	36	38	+ 5.6%
Cumulative Days on Market Until Sale	34	44	+ 29.4%	39	41	+ 5.1%
Average List Price	\$486,313	\$510,373	+ 4.9%	\$491,205	\$518,288	+ 5.5%
Inventory of Homes for Sale	6,952	9,289	+ 33.6%	--	--	--
Months Supply of Inventory	2.0	2.7	+ 35.0%	--	--	--

* Does not account for sale concessions and/or downpayment assistance. | Percent changes are calculated using rounded figures and can sometimes look extreme due to small sample size.

Source: Canopy MLS

Listing volume is up 7.2% Year-to-Date 2024 versus a year ago. Median Sales Prices are up 3.9% over the same timeframe. The total number of homes for sale has been much better and is now up 33.6% from one year ago. There is 2.7 month’s supply of inventory available in the market, slightly improved from a year ago.

Commercial

Charlotte's commercial real estate markets are active and generally performing well. However, the office and multi-family segments have seen a significant uptick in vacancies, which is consistent with other similar-sized markets. There is a substantial amount of apartments under construction, leading to an upward-trending vacancy projection. Absorption is generally positive and lease rates continue to increase in all segments except for multi-family. The Industrial segment has experienced significant rent growth over the last 24 months. Vacancy rates for Retail have fluctuated little, within a few hundred basis points over the last 5 years. Office and Multi-Family are trending upward.

The following table outlines key statistics for each segment of the commercial real estate market:

Charlotte Market

Commercial Real Estate Segments Key Data

Q3 2024	Industrial	Office	Multifamily	Retail
Inventory YTD	387,780,115 SF	138,403,637 SF	231,649 Units	153,669,240 SF
Vacancy Rate	8.7%	14.2%	12.8%	3.0%
Vacancy Rate One Year Ago	5.8%	12.7%	11.5%	2.7%
12 Month Net Absorption	1,818,037 SF	(1,017,234) SF	12,000 Units	(217,517) SF
Market Asking Rent	\$9.32 /SF	\$33.77 /SF	\$1,610 /Month	\$24.81 /SF
Market Rent One Year Ago	\$8.95 /SF	\$33.15 /SF	\$1,629 /Month	\$23.72 /SF
Indicated 12-Month Rent Growth	4.1%	1.9%	-1.2%	4.6%
Under Construction	10,960,790 SF	1,406,469 SF	25,055 Units	638,952 SF
Indicated Expansion	2.8%	1.0%	10.8%	0.4%

Source: CoStar

CONCLUSIONS AND RECENT NEWS

The Charlotte MSA region is home to of 2.85 million people in 11 counties, straddling the North Carolina-South Carolina state line. It is strategically located in the center of the East Coast, within a day's motor freight delivery to about 60% of the US population and over 60% of the nation's industrial base. Positive characteristics for the region include a relatively low cost of doing business, a diversified industrial structure, and a rapidly growing population base due to in-migration.

Recent regional new job announcements in the region are outlined in the following table. Most of the new employment is in advanced manufacturing.

**Charlotte Region
Economic Development Announcements**

<u>County</u>	<u>Company</u>	<u># New Jobs</u>	<u>Capital Investment (\$ Millions)</u>
Iredell	Corvid Technologies	54	\$30.0
Iredell	DEHN, Inc	195	\$38.6
Stanly	Flextol	11	\$0.3
Gaston	HEYCO-Werk USA, Inc	34	\$12.7
Gaston	Lyddhal Telecom America, Inc	54	\$5.6
Iredell	Macleam Curtis	14	\$16.3
Lancaster	LCI Lineberger	10	\$8.0
Mecklenburg	Octapharma Plasma, Inc	--	\$18.7
York	Private Advisor Group	6	--
Mecklenburg	Rhombus, Inc	7	--
Mecklenburg	Siemens Energy	475	\$149.0
Catawba	Steel Warehouse	58	\$27.0
Mecklenburg	Verinext	8	--

Source: Charlotte Regional Business Alliance

Charlotte Regional Business Reliance’s 3rd Quarter 2024 *Growth Report* has the following commentary regarding the economic performance for the region:

“The Charlotte Region is still seeing positive economic growth, the CLT Alliance Research Team found. In the third quarter of 2024, the region had \$23 million in capital investments and 86 announced jobs. The unemployment rate sat at 3.32%.

LCI-Lineberger, a heavy civil contractor, is one of the companies adding jobs. In early September, the Lancaster County Department of Economic Development announced the company was expanding. LCI-Lineberger will invest \$8 million to create at least 10 new jobs at its asphalt manufacturing facility in the KCH Industrial Park on Kershaw-Camden Highway. Part of the \$8 million will also be invested in new equipment. LCI-Lineberger is headquartered in Lancaster County and already employs more than 100 people, the Lancaster County Department of Economic Development said.

The company’s expansion is evidence of a healthy economic environment in the Charlotte Region. This year, 30 announced projects have resulted in 1,827 announced jobs and more than \$663 million in capital investments.

This quarter, South Carolina has announced nearly 1,300 jobs across the state. In North Carolina, that number tops 4,000.

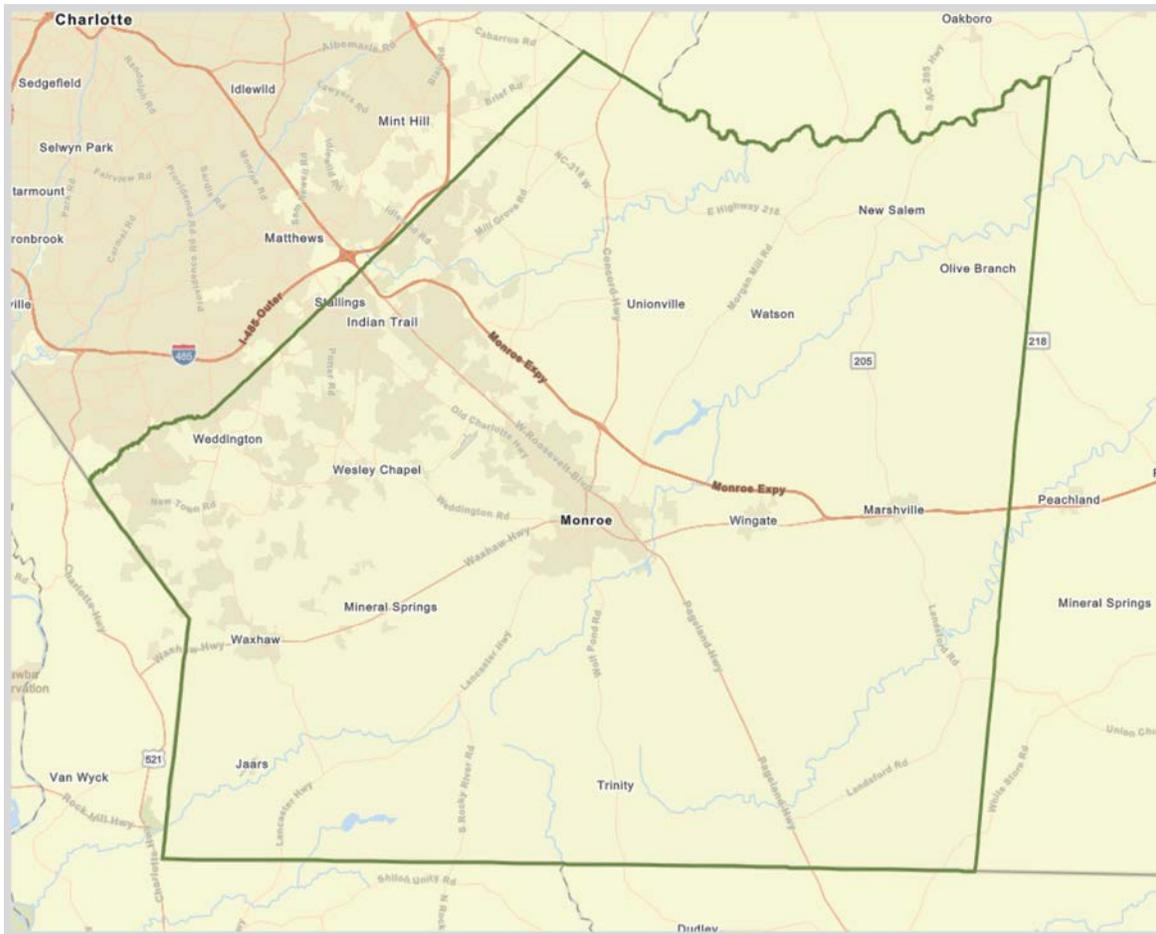
There are 66 active projects in the Charlotte Region that are projected to generate about 18,570 new job opportunities.

The region is attractive to investors. It has low corporate tax rates, a range of incentives for businesses, and a commitment to fostering a business-friendly environment. This makes the landscape appealing to both domestic and international companies interested in initiating or expanding their operations in the area, contributing to the ongoing economic vitality of the Charlotte Region.”

UNION COUNTY

Union County is a part of the Charlotte MSA, bordering Mecklenburg County to the northwest. Primary municipalities in Union County are Monroe, Indian Trail, Weddington, and Waxhaw. Indian Trail, Weddington, and Waxhaw benefit from proximity to Mecklenburg County. Monroe is about 25 miles southeast of the Charlotte CBD. The areas in the east and south of the county are rural.

UNION COUNTY



Regional accessibility for Union County is good. The county is bisected by US Highways 74 and 601, which intersect in Monroe. US Highway 74 runs southeast from Charlotte to Wilmington. This heavily traveled thoroughfare is the primary east-west route in this part of the state, linking Union County to the surrounding region. The Monroe Bypass/Expressway, a toll road bypass from Stallings to Wingate, was completed late in 2018 and is shown on the following map. This expressway is helping to alleviate chronic traffic congestion along US Highway 74.

MONROE BYPASS/EXPRESSWAY



DEMOGRAPHIC TRENDS

Union County has an estimated 2024 population of 257,691, with an average projected annual growth rate of 1.6% from 2020 through 2029. Union County’s income levels and housing values are above that of the MSA. Median home values are projected to increase 3.7% annually in Union County for the next 5 years, which is similar to the MSA. Slightly less than 80% of the county’s housing units are owner-occupied. The accompanying table outlines general demographic data for the Town of Wingate, City of Monroe, and Union County, in comparison to the MSA:

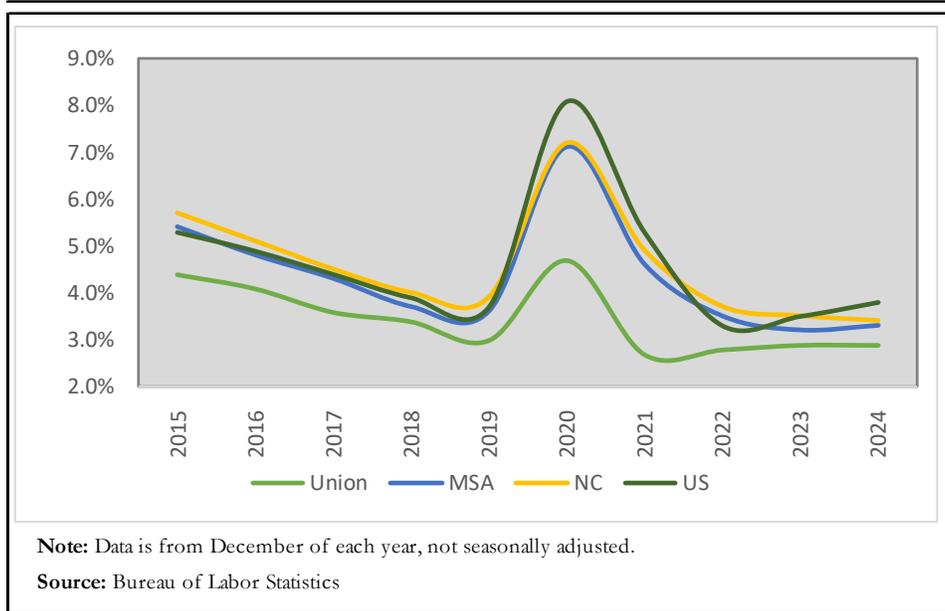
Demographic Summary

	Town of Wingate	City of Monroe	Union County	Charlotte MSA
Population				
2029 Projection	4,018	40,150	275,741	3,026,237
2024 Estimate	4,034	37,350	257,691	2,851,936
2020 Census	4,116	34,563	238,267	2,660,329
2010 Census	3,547	32,881	201,295	2,243,837
Annual % Change 2010-2024	0.9%	0.9%	1.8%	1.7%
Projected Annual % Change 2020-2029	-0.3%	1.7%	1.6%	1.4%
Households				
2029 Projection	930	14,240	93,502	1,198,368
2024 Estimate	931	13,224	56,998	1,116,721
2020 Census	939	12,162	80,167	1,034,018
2010 Census	961	11,153	67,866	858,450
Annual % Change 2010-2024	-0.2%	1.2%	-1.2%	1.9%
Projected Annual % Change 2020-2029	-0.1%	1.8%	1.7%	1.7%
2024 Average Household Size	4.3	2.8	4.5	2.6
Median Household Income				
2029 Projection	\$73,157	\$82,585	\$114,902	\$96,271
2024 Estimate	\$59,649	\$70,224	\$100,630	\$81,494
Projected Annual % Change 2024-2029	4.2%	3.3%	2.7%	3.4%
Median Owner-Occupied Housing Values				
2029 Projection	\$548,272	\$418,418	\$533,551	\$447,193
2024 Estimate	\$278,814	\$332,495	\$444,654	\$373,787
Projected Annual % Change 2024-2029	14.5%	4.7%	3.7%	3.7%
Housing Summary				
2024 Owner-Occupied	60.3%	59.2%	78.3%	61.2%
2024 Renter-Occupied	30.2%	34.7%	17.2%	32.2%
% Vacant	9.5%	6.1%	4.5%	6.6%
Source: US Census Bureau, Census 2010 and 2020. ESRI estimates and forecasts for 2024 and 2029.				

ECONOMY

Like most places, unemployment in Union County peaked in 2020 during the coronavirus pandemic and began to decline and level out in 2021-2022. The following graph is a comparison of unemployment rates for the last 10 years for the US, North Carolina, Charlotte MSA, and Union County:

Unemployment Rate Comparison



According to the North Carolina Department of Commerce, Division of Employment Security data, employment in Union County grew at an average of 1.7% per year from 2020 to 2024, with an average unemployment rate of 3.2%. The following table outlines employment trends for Union County:

5-Year Employment Trends Union County

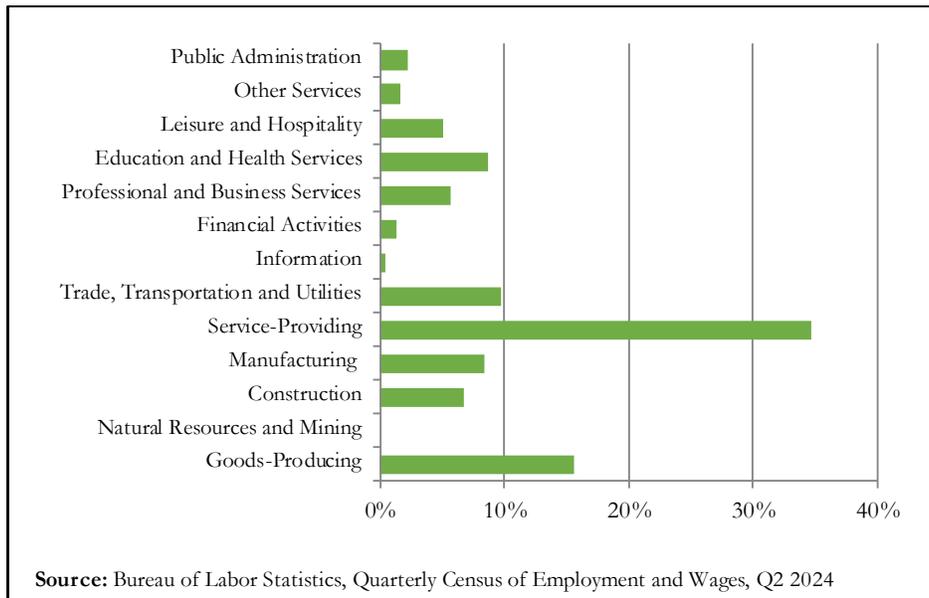
<u>Year</u>	<u>Employment</u>	<u>Growth (Jobs)</u>	<u>% Growth</u>	<u>Unemployment Rate</u>
2020	114,253	-5,346	-4.5%	4.7%
2021	123,744	9,491	8.3%	2.7%
2022	126,494	2,750	2.2%	2.8%
2023	128,230	1,736	1.4%	2.9%
2024	129,794	1,564	1.2%	2.9%
Average 2020-2024	124,503	2,039	1.7%	3.2%

Note: Annual data is from December of each year, unadjusted.
Source: NC Department of Commerce, Division of Employment Security

Employment within Union County is dominated by the Service-Providing sector, which comprises approximately 35% of all employed persons. Goods-Producing accounts for approximately 16%, with Trade, Transportation, and Utilities at approximately 10% and Education and Health Services at approximately 9%, as shown below:

Employment by Industry, Proportionate Share

Union County



According to the NC Department of Commerce, Labor & Economic Analysis, the 10 largest employers in Union County are as follows, listed by number employed:

Union County Largest Employers

<u>Company</u>	<u>Industry</u>	<u># Employed</u>
Union Co Schools	Education	1,000+
Union County	Public Administration	1,000+
ATI Specialty Materials	Manufacturing	1,000+
Tyson Farms	Manufacturing	1,000+
Harris Teeter	Retail	1,000+
Utility Lines Construction	Construction	1,000+
Wal-Mart	Retail	500-999
City of Monroe	Public Administration	500-999
Charlotte-Mecklenburg Hospital Authority	Healthcare	500-999
Pilgrims Pride	Manufacturing	500-999

Source: NC Dept of Commerce, Q2 2024

CONCLUSION

Union County and the surrounding Charlotte metropolitan area have increasingly diversified economies. Both population and labor force are trending upward. With a commitment to infrastructure expansion, including the Monroe Bypass and the continuing outward growth from inner Charlotte, Union County is poised for growth.

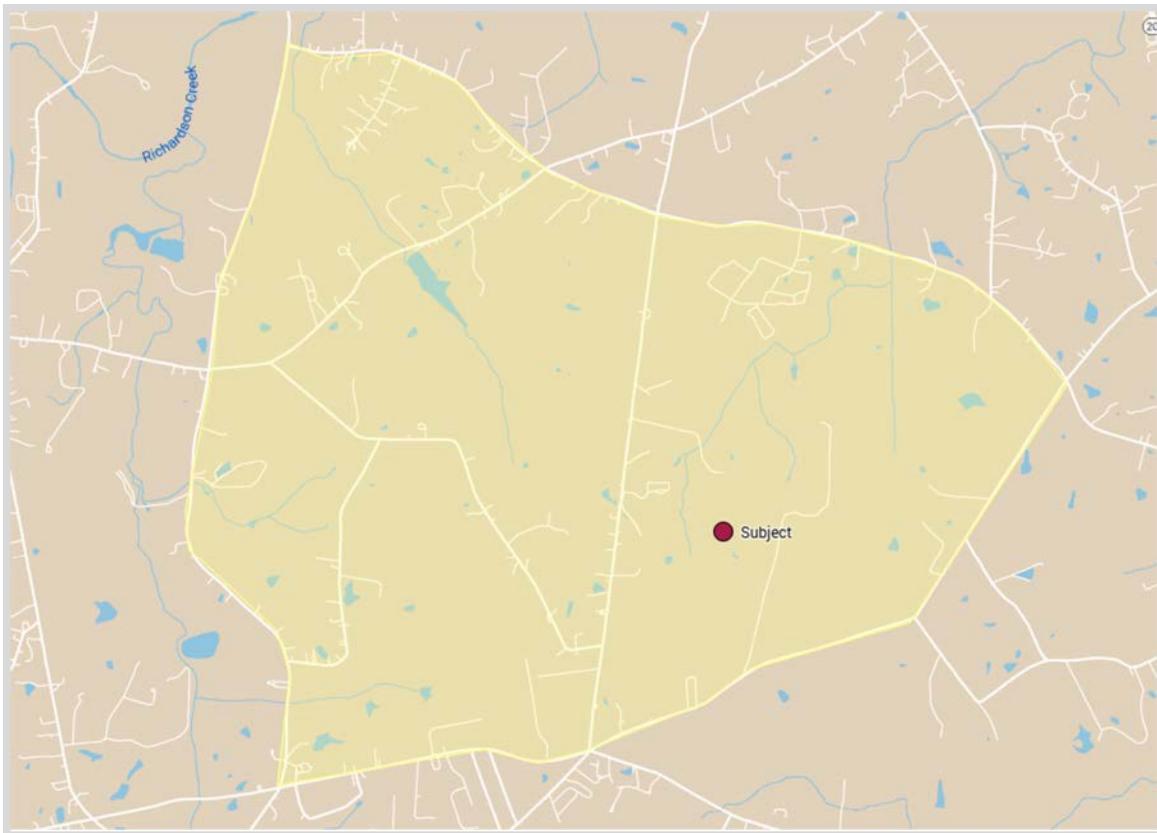
NEIGHBORHOOD ANALYSIS

The Dictionary of Real Estate Appraisal, 7th Edition, 2022, page 130, defines a neighborhood as "a group of complementary land uses; a congruous grouping of inhabitants, buildings, or business enterprises."

LOCATION/BOUNDARIES

The subject is located approximately 7 miles northeast of Monroe in the unincorporated portion of Union County. The neighborhood is a rural area that is comprised primarily of residential and agricultural users. There is vacant land available for new development. The following map shows the neighborhood boundaries and location of the subject within the neighborhood:

NEIGHBORHOOD MAP



ACCESSIBILITY

Primary access to the neighborhood is provided by the US-74 Bypass, which is located immediately south of the neighborhood. Secondary access is provided by Monroe-Ansonville/Ansonville Road, Mills Harris Road, McIntyre Road, Olive Branch Road and East Lawyers Road. Access to the neighborhood is good.

UTILITIES

The majority of the subject neighborhood has private wells and septic system with access to electricity, natural gas, and telecommunications services provided by private companies.

LAND USE PATTERN/DEVELOPMENT ACTIVITY

The neighborhood is a rural area that is comprised primarily of residential and agricultural users. There is vacant land available for new development. There are no known zoning changes or applications for change that would have a negative impact in the neighborhood. The zoning districts and land use pattern are compatible.

NEIGHBORHOOD LAND USE



BUILT-UP/LIFE CYCLE

The surrounding neighborhood is approximately 20% built up with vacant land available for new development. The majority of vacant land in the neighborhood is used for agricultural purposes. Considering the life cycles that neighborhoods have, growth, stability, decline and revitalization--the subject neighborhood is in a stable/slight decline stage.

ENVIRONMENTAL CHARACTERISTICS

The primary environmental characteristics to be considered are any nuisances or hazards as a result of land uses within the subject neighborhood. The appraisers are unqualified to determine the existence of hazardous materials; however, based on an inspection of the area, this report assumes there are no adverse nuisances or hazards that would impact property values in a negative way.

DEMOGRAPHICS

The accompanying table summarizes past, current and projected demographics for the neighborhood. Town of Wingate, City of Monroe, Union County, and MSA data is shown for comparison. The demographic profile for the neighborhood indicates incomes that are similar to the City of Monroe and below Union County and the MSA. Owner-occupied housing values are below the Town of Wingate and Union County but above the City of Monroe and MSA. The neighborhood has historically remained a slow growth/stable area with a slight amount of decline, primarily due to the rural nature of the area. Population growth is forecasted to decline slightly through 2029.

Demographic Summary

	Neighborhood	Town of Wingate	City of Monroe	Union County	Charlotte MSA
Population					
2029 Projection	509	4,018	40,150	275,741	3,026,237
2024 Estimate	510	4,034	37,350	257,691	2,851,936
2020 Census	540	4,116	34,563	238,267	2,660,329
2010 Census	531	3,547	32,881	201,295	2,243,837
Annual % Change 2010-2024	-0.3%	0.9%	0.9%	1.8%	1.7%
Projected Annual % Change 2020-2029	-0.7%	-0.3%	1.7%	1.6%	1.4%
Households					
2029 Projection	183	930	14,240	93,502	1,198,368
2024 Estimate	182	931	13,224	56,998	1,116,721
2020 Census	180	939	12,162	80,167	1,034,018
2010 Census	166	961	11,153	67,866	858,450
Annual % Change 2010-2024	0.7%	-0.2%	1.2%	-1.2%	1.9%
Projected Annual % Change 2020-2029	0.2%	-0.1%	1.8%	1.7%	1.7%
2024 Average Household Size	2.8	4.3	2.8	4.5	2.6
Median Household Income					
2029 Projection	\$84,344	\$73,157	\$82,585	\$114,902	\$96,271
2024 Estimate	\$70,822	\$59,649	\$70,224	\$100,630	\$81,494
Projected Annual % Change 2024-2029	3.6%	4.2%	3.3%	2.7%	3.4%
Median Owner-Occupied Housing Values					
2029 Projection	\$500,000	\$548,272	\$418,418	\$533,551	\$447,193
2024 Estimate	\$263,542	\$278,814	\$332,495	\$444,654	\$373,787
Projected Annual % Change 2024-2029	13.7%	14.5%	4.7%	3.7%	3.7%
Housing Summary					
2024 Owner-Occupied	64.7%	60.3%	59.2%	78.3%	61.2%
2024 Renter-Occupied	24.5%	30.2%	34.7%	17.2%	32.2%
% Vacant	10.8%	9.5%	6.1%	4.5%	6.6%
Source: US Census Bureau, Census 2010 and 2020. <i>ESRI</i> estimates and forecasts for 2024 and 2029.					

CONCLUSION

The subject is located approximately 7 miles northeast of Monroe in the unincorporated portion of Union County. The neighborhood is a rural area that is comprised primarily of residential and agricultural users. There is vacant land available for new development. The neighborhood has historically remained a slow growth/stable area with a slight amount of decline, primarily due to the rural nature of the area. Population growth is forecasted to decline slightly through 2029. The subject neighborhood is in a stable/slight decline stage.

RESEARCH PUBLICATION SUMMARY

In the past, as well as currently for this assignment, we have researched various articles, essays, and publications regarding transmission lines and substations, and their potential impact on real estate values on nearby properties.

Typical variables considered control variables such as structural i.e., housing size, age of home, occupancy, lot size, and construction materials. The other set of variables include things such as the economy, neighborhood characteristics, environmental conditions, accessibility, and position in a neighborhood.

Results for the impact on real estate values derived from the studies varied from positive to negative. Regarding the negative impact, especially for substations, it was less than 3%, and that depended on proximity to the substation and/or transmission line. This is believed to be minimal. Considering the subject's rural location and its proposed siting on the eastern portion of the property with heavy buffering, and the surveys' results, property values will not be impacted by the proposed substation.

Regarding health concerns, one article reported that after nearly 40 years of research, there is no clear indication that the magnetic fields, or some other factor to do with being near a power line has any effects on health. The level of EMF's should not be any more than what would be found in a home.

FINDINGS OF FACT

There are five findings of fact and assumptions that are considered by the Union County Board of Adjustment. This report assumes UPC will meet all performance standards and that all zoning, and/or governmental regulations, will be met. For UPC to win approval, the following criteria will have to be met per the Zoning Ordinance.

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.

This report assumes that the proposed use will meet all regulations and conditions set forth by the county, state, and federal government. The proposed use will be in harmony with the area.

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;*
- b. Provision of services and utilities, including sewer, water, electrical, garbage collections and fire protection;*
- c. Soil erosion and sedimentation; and*
- d. Protection of public, community, or private water supplies, including possible adverse effects on surface waters or groundwater.*

It is assumed that Union Power Cooperative (UPC) will adhere to the American National Standard (ANSI) *National Electrical Safety Code, ANSI/IEEE* as well as the Occupational Safety and Health Administration regulations. UPC has had a long history of operation in this area and has complied with all local and state laws. It is assumed UPC will continue to operate in the same professional manner.

As the substation will be unmanned, no public utilities will be required to operate and maintain the facility. Water, sewer and garbage collection will not be required. The proposed substation will not create additional traffic and will have a minimal impact, if any on vehicular traffic. Regarding “Item B” above, the new substation will increase electrical capacity for the area to meet increasing demand.

Regarding soil erosion/sedimentation, the UPC will abide by the guidelines detailed in the North Carolina Sediment and Erosion Control to minimize site disturbance, control water runoff, and stabilize graded slopes. UPC will also implement an SPCC oil spill prevention plan.

A 30-foot stream buffer is located along both sides of Jack’s Branch, which is located through the eastern portion of the site. Additionally, wetlands are located on the site. Based on the proposed site plan, the substation will not impact the existing buffer or wetlands.

As the appraisers are not experts in the field of public health or safety, they are unable to provide a professional opinion regarding this criterion. However, based on the above, it is assumed the proposed use will adhere to all regulations. It is assumed that Electromagnetic field (EMF) and noise levels will not exceed ambient levels found outside the property.

Lastly, UPC will install a farm gate to prevent local traffic from entering the property. Per Standard Operating Standards, security fencing, with barbed wire will be placed around the substation infrastructure. Gates to the property and the substation itself will be locked all the time.

3. *The proposed development will not substantially injure the value of abutting property, or is a public necessity. welfare.*
 The proposed substation will be set back approximately 2,950 feet from Ansonville Road, which is the closest public roadway, and will have a large, wooded buffer. The substation will be in keeping with the rural nature of the neighborhood. An existing 68-foot-wide Duke Energy right-of-way and transmission line extend from the site’s southeastern boundary to the site’s northwestern boundary. The proposed substation will be located immediately north of the existing transmission line on the eastern portion of the site.

As previously discussed in the Neighborhood section of the report, ESRI projects home values to increase at a healthy average of 13.7% per year, which is slightly below that of the Town of Wingate, which is projected to grow at an average of 14.5% per year. The 2024 estimated median owner-occupied housing value in the neighborhood is \$263,542, which is projected to increase to \$500,000 in 2029. As shown in the following tables, within a 3-mile radius of the proposed Wingate substation, median sale prices of single-family homes have generally increased over the past 5 years. Sale prices of acreage/farmland fluctuates annually; primarily due to the low number of sales for this property type.

**5-Year Historical Home Sales & Median Sale Prices
 Proposed Wingate Substation (3 Mile Radius)**

<u>Year</u>	<u>Number of Sales</u>	<u>Median Closed Price</u>
2020	63	\$249,500
2021	71	\$295,360
2022	61	\$310,000
2023	39	\$330,000
2024	32	\$357,500
Average 2020-2024	53	\$308,472

Source: CMLS

**5-Year Historical Acreage/Farmland Sales & Median Sale Prices
Proposed Wingate Substation (3 Mile Radius)**

<u>Year</u>	<u>Number of Sales</u>	<u>Median Closed Price</u>
2020	5	\$116,000
2021	11	\$198,358
2022	6	\$260,000
2023	2	\$120,000
2024	2	\$677,500
Average 2020-2024	5	\$274,372

Source: CMLS

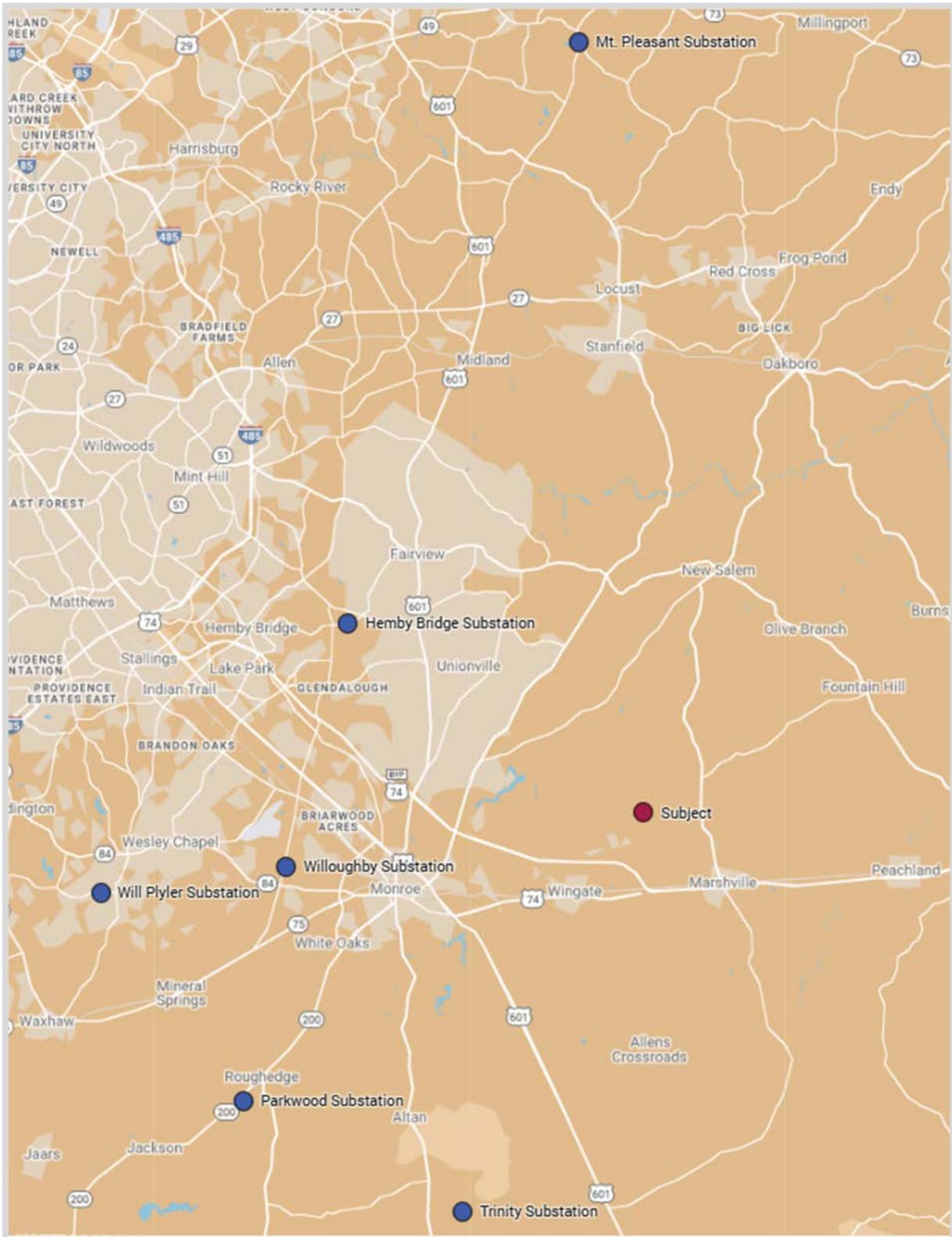
Realtors from National Land, Haymond Properties, the Moser Group and Dean Harrell who are active in land sale and development in Union County were contacted to discuss the potential impact of building a substation. After explaining the location and plans for the subject, especially buffering, most believed it would not have a negative impact on nearby property values. One felt a substation could have an undesirable impact. This broker specified that visibility to adjoining properties was an important factor. He stated that “if you can see it, it’s a problem.” He also cited the public’s perception of potential health problems due to EMF’s. When the broker spoke of EMF’s, he mainly referred to large transmission wires and not substations.

When asked if the brokers knew of a situation where development of a substation impacted property values, none did. All stated that there are a lot of variables that need to be considered, such as visibility, if transmission lines already exist, the way the substation is sited on the property, and if there is sufficient buffer. All felt buffering was critical. Also, most felt being in a largely residential/rural location was helpful.

COMPARABLE SUBSTATIONS

A sample of substations similar as to what is proposed on the subject were researched to see if there were any indications that the substation impacted property values nearby, assuming all other factors remain equal. Following is a synopsis for each comparable.

OVERALL LOCATION MAP OF COMPARABLE SUBSTATIONS



PARKWOOD SUBSTATION



Union Power Cooperative’s Parkwood substation was constructed in 2023/2024 and replaced an older facility. The area surrounding the Parkwood substation is rural and agricultural, similar to the area surrounding the proposed Wingate substation. As shown in the following tables, within a 3-mile radius of the Parkwood substation, median sale prices of single-family homes have generally increased over the past 5 years. Sale prices of acreage/farmland fluctuates annually; primarily due to the low number of sales for this property type. The information shown in the tables below indicates that the market in this area remained generally healthy and it is not likely that the substation or other factors negatively impacted property values.

5-Year Historical Home Sales & Median Sale Prices Parkwood Substation (3 Mile Radius)

Year	Number of Sales	Median Closed Price
2020	54	\$288,975
2021	64	\$345,000
2022	71	\$430,000
2023	44	\$487,500
2024	50	\$471,500
Average 2020-2024	57	\$404,595

Source: CMLS

5-Year Historical Acreage/Farmland Sales & Median Sale Prices Parkwood Substation (3 Mile Radius)

Year	Number of Sales	Median Closed Price
2020	10	\$105,000
2021	13	\$132,500
2022	3	\$430,000
2023	2	\$289,950
2024	3	\$300,000
Average 2020-2024	6	\$251,490

Source: CMLS

TRINITY SUBSTATION



Union Power Cooperative’s Trinity substation is a new substation that replaced an older facility in 2019. The area surrounding the Trinity substation is rural and agricultural, similar to the area surrounding the proposed Wingate substation. As shown in the following tables, within a 3-mile radius of the Trinity substation, median sale prices of single-family homes have generally increased over the past 5 years. Sale prices of acreage/farmland fluctuates annually; primarily due to the low number of sales for this property type. The information shown in the tables below indicates that the market in this area remained generally healthy and it is not likely that the substation or other factors negatively impacted property values.

5-Year Historical Home Sales & Median Sale Prices Trinity Substation (3 Mile Radius)

Year	Number of Sales	Median Closed Price
2020	12	\$210,000
2021	21	\$260,000
2022	13	\$350,000
2023	19	\$389,500
2024	9	\$339,000
Average 2020-2024	15	\$309,700

Source: CMLS

5-Year Historical Acreage/Farmland Sales & Median Sale Prices Trinity Substation (3 Mile Radius)

Year	Number of Sales	Median Closed Price
2020	1	\$30,000
2021	2	\$451,788
2022	4	\$122,500
2023	2	\$728,300
2024	2	\$485,000
Average 2020-2024	2	\$363,518

Source: CMLS

HEMBY BRIDGE SUBSTATION



The Hemby Bridge substation was built in 2008, and based on historical maps, there was no substation at or near this location prior to its development. The Hemby Bridge substation is located in a more populated/suburban area, similar to the Will Plyler and Willoughby substations, as compared to the proposed Wingate substation. The substation is heavily buffered and difficult to see from the road, with the exception of the entrance drive. As shown in the following tables, within a 3-mile radius of the Hemby Bridge substation, median sale prices of single-family homes have generally increased over the past 5 years. Sale prices of acreage/farmland fluctuates annually; primarily due to the low number of sales for this property type. The information shown in the tables below indicates that the market in this area remained generally healthy and it is not likely that the substation or other factors negatively impacted property values.

5-Year Historical Home Sales & Median Sale Prices Hemby Bridge Substation (3 Mile Radius)

Year	Number of Sales	Median Closed Price
2020	259	\$312,900
2021	275	\$361,612
2022	189	\$464,456
2023	183	\$478,250
2024	143	\$482,000
Average 2020-2024	210	\$419,844

Source: CMLS

5-Year Historical Acreage/Farmland Sales & Median Sale Prices Hemby Bridge Substation (3 Mile Radius)

Year	Number of Sales	Median Closed Price
2020	11	\$300,000
2021	18	\$201,750
2022	4	\$467,500
2023	7	\$183,904
2024	2	\$87,250
Average 2020-2024	8	\$248,081

Source: CMLS

WILL PLYLER SUBSTATION



The Will Plyler substation was built around 2008, and is a more populated/suburban area, similar to the Hemby Bridge and Willoughby substations, and more populated than the proposed Wingate substation. The substation is heavily buffered and difficult to see from the road, with the exception of the entrance drive. As shown in the following tables, within a 3-mile radius of the Will Plyler substation, median sale prices of single-family homes have generally increased over the past 5 years. Sale prices of acreage/farmland fluctuates annually; primarily due to the low number of sales for this property type. The information shown in the tables below indicates that the market in this area remained generally healthy and it is not likely that the substation or other factors negatively impacted property values.

5-Year Historical Home Sales & Median Sale Prices Will Plyler Substation (3 Mile Radius)

Year	Number of Sales	Median Closed Price
2020	612	\$483,500
2021	554	\$599,945
2022	441	\$701,000
2023	325	\$739,000
2024	335	\$795,000
Average 2020-2024	453	\$663,689

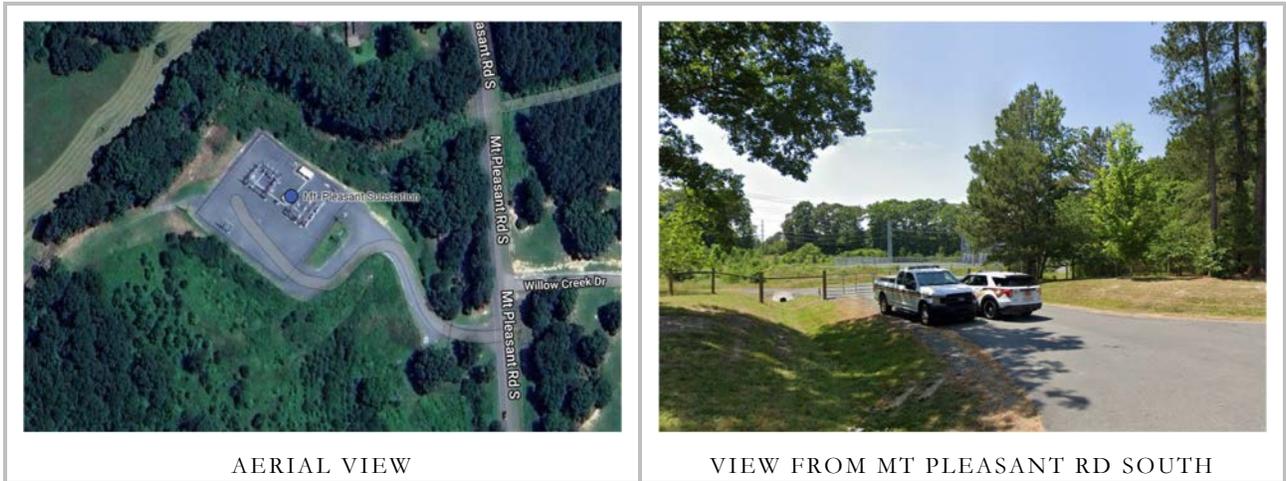
Source: CMLS

5-Year Historical Acreage/Farmland Sales & Median Sale Prices Will Plyler Substation (3 Mile Radius)

Year	Number of Sales	Median Closed Price
2020	7	\$250,000
2021	15	\$330,000
2022	9	\$400,000
2023	2	\$940,000
2024	4	\$345,000
Average 2020-2024	7	\$453,000

Source: CMLS

MT. PLEASANT SUBSTATION



The Mt. Pleasant substation was built around 2015. As shown in the following tables, within a 3-mile radius of the Mt. Pleasant substation, median sale prices of single-family homes have generally increased over the past 5 years. Sale prices of acreage/farmland fluctuates annually; primarily due to the low number of sales for this property type. The information shown in the tables below indicates that the market in this area remained generally healthy and it is not likely that the substation or other factors negatively impacted property values.

5-Year Historical Home Sales & Median Sale Prices Mt Pleasant Substation (3 Mile Radius)

Year	Number of Sales	Median Closed Price
2020	78	\$275,000
2021	79	\$295,000
2022	54	\$312,250
2023	48	\$319,950
2024	41	\$409,000
Average 2020-2024	60	\$322,240

Source: CMLS

5-Year Historical Acreage/Farmland Sales & Median Sale Prices Mt Pleasant Substation (3 Mile Radius)

Year	Number of Sales	Median Closed Price
2020	3	\$65,000
2021	5	\$160,000
2022	7	\$225,000
2023	8	\$220,000
2024	3	\$72,000
Average 2020-2024	5	\$148,400

Source: CMLS

WILLOUGHBY SUBSTATION



The Willoughby substation was built in 2022/2023, and is a more populated/suburban area, similar to the Hemby Bridge and Will Plyler substations, and more populated than the proposed Wingate substation. As shown in the following tables, within a 3-mile radius of the Willoughby substation, median sale prices of single-family homes have generally increased over the past 5 years. Sale prices of acreage/farmland fluctuates annually; primarily due to the low number of sales for this property type. The information shown in the tables below indicates that the market in this area remained generally healthy and it is not likely that the substation or other factors negatively impacted property values.

5-Year Historical Home Sales & Median Sale Prices Willoughby Substation (3 Mile Radius)

Year	Number of Sales	Median Closed Price
2020	353	\$243,000
2021	433	\$320,000
2022	424	\$381,750
2023	249	\$375,000
2024	377	\$402,684
Average 2020-2024	367	\$344,487

Source: CMLS

5-Year Historical Acreage/Farmland Sales & Median Sale Prices Willoughby Substation (3 Mile Radius)

Year	Number of Sales	Median Closed Price
2020	1	\$425,000
2021	1	\$1,250,000
2022	3	\$89,000
2023	5	\$285,000
2024	2	\$991,500
Average 2020-2024	2	\$608,100

Source: CMLS

4. *The proposed development will be in harmony with the area in which it is located.*

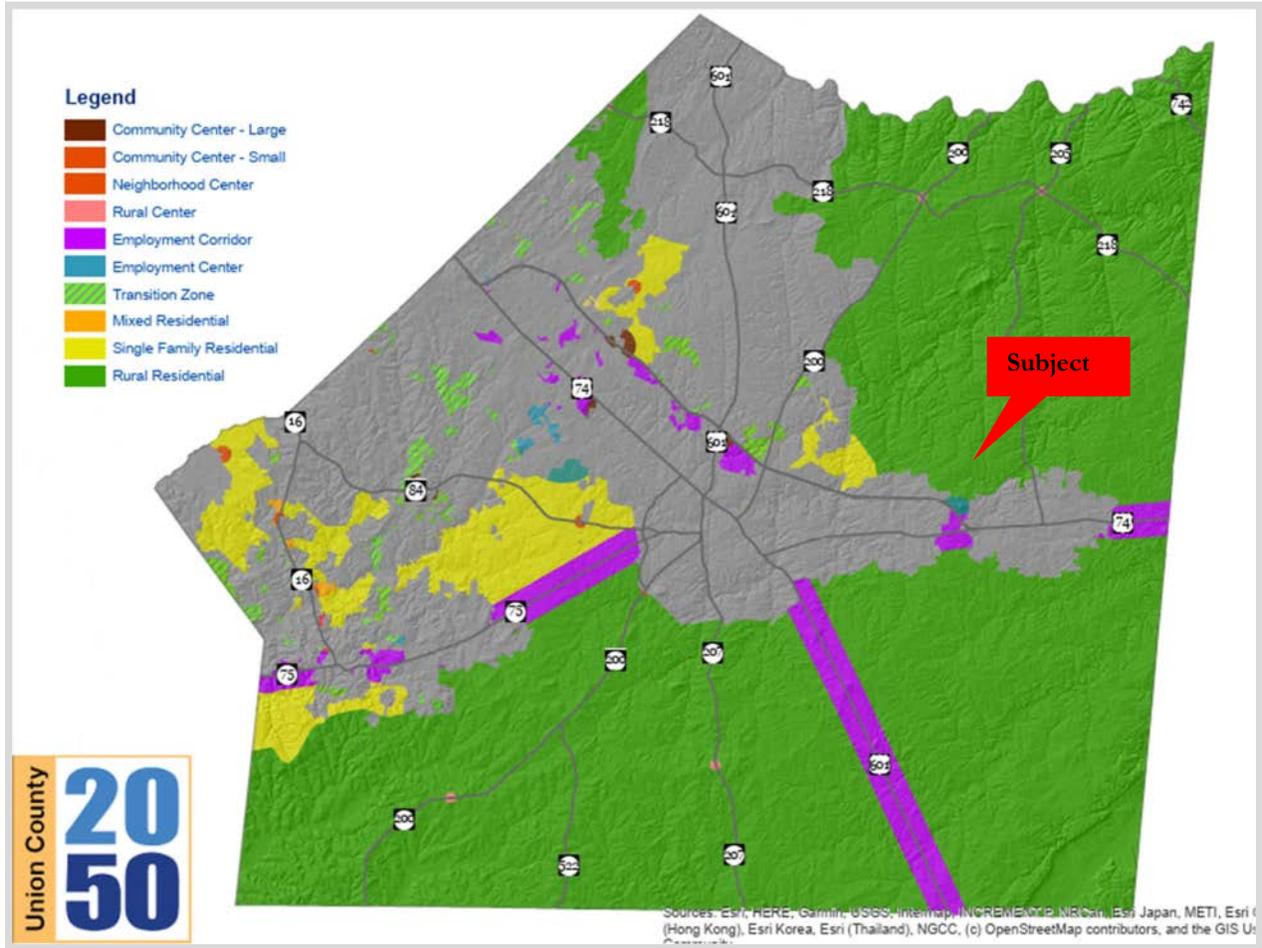
The property and a majority of the neighborhood are zoned RA-200, which is intended for low density residential, agricultural, and institutional users. Much of the neighborhood consists of agricultural land, with rural residential uses as well. The proposed substation is to be located in this area to avoid being close to higher densities, particularly single-family residential development.

There are existing distribution and transmission lines on the site as well as transmission towers. As one of the brokers interviewed stated, the existence of large transmission lines should have little effect on buyers. One of the studies commented that large easements for power lines are often used for park, bike paths, or open space and some believe that is desirable. The existing lines will be connected to the proposed substation. This is more efficient and has no impact on other property owners or environmentally sensitive areas.

5. *The proposed development will be in general conformity with the comprehensive plan.*

The Adopted Union County 2050 Land Use Map is included on the following page. The County intends to have rural residential and agricultural uses in the subject's neighborhood. Under the RA-200 zoning, a substation is listed as a Special Use and a permit is required. The proposed substation will be located approximately 2,500 feet north of Ansonville Road and will maintain a large, wooded buffer along the perimeter, which will preserve the agricultural nature of the area. The majority of the surrounding land users are agricultural or homes on larger tracts of land.

ADOPTED UNION COUNTY 2050 LAND USE MAP

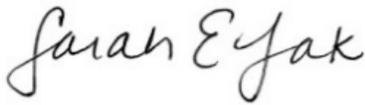


CONCLUSION

Based on our research, use of a portion of the site for development of a substation will maintain or enhance the value of contiguous property, and will not violate the neighborhood character or adversely affect surrounding land uses. Additionally, the proposed substation will comply with the general plan for the physical development of the County as embodied in the Union County Development Ordinance and/or in the Future Land Use Plan.

Thank you for the opportunity to be of service, and if any information or clarification is needed, please do not hesitate to contact us.

Sincerely,



Sarah E Lak
North Carolina State Registered Trainee Appraiser #T5345

704-375-1032 x 705
sarah@fortenberrylambert.com



Mark T Lambert, MAI, AI-GRS
North Carolina State Certified General Appraiser #A3572

704-650-6271
mark@fortenberrylambert.com



ADDENDA

ASSUMPTIONS AND LIMITING CONDITIONS

This appraisal report has been made with the following general assumptions and limiting conditions:

LIMIT OF LIABILITY

The liability of **Fortenberry Lambert, Inc.** is limited only to the client. Further, there is no accountability, obligation, or liability to any third party. If this report is placed in the hands of anyone other than client, the client shall make such party aware of all limiting conditions and assumptions of the assignment and related discussions. Further, client will forever indemnify and hold **Fortenberry Lambert, Inc.**, its officers, and employees harmless from any claims by third parties related in any way to the appraisal. Third parties shall include limited partners of client if client is a partnership and stockholders of client if client is a corporation, and all lenders, tenants, past owners, successors, assigns, transferees, and spouses of client. **Fortenberry Lambert, Inc.** will not be responsible for any costs incurred to discover or correct any deficiencies of any type present in the property, physically, financially, and/or legally.

COPIES, DISTRIBUTION, USE OF REPORT

Possession of this report or any copy of this report does not carry with it the right of publication, nor may it be used for other than its intended use; the physical report remains the property of **Fortenberry Lambert, Inc.** for the use of the client, the fee being for the analytical services only.

The bylaws and regulations of the Appraisal Institute require each member and candidate to control the use and distribution of each report signed by such member or candidate; except, however, the client may distribute copies of this report in its entirety to such third parties as he may select; however, selected portions of this report shall not be given to third parties without the prior written consent of the signatories of this report. Neither all nor any part of this report shall be disseminated to the general public by the use of advertising media, public relations, news, sales or other media for public communication without the prior written consent of **Fortenberry Lambert, Inc.**

CONFIDENTIALITY

This report is to be used only in its entirety and no part is to be used without the whole report. All conclusions and opinions concerning the analysis as set forth in the report were prepared by **Fortenberry Lambert, Inc.** whose signatures appear on the report. No change of any item in the report shall be made by anyone other than **Fortenberry Lambert, Inc.** **Fortenberry Lambert, Inc.** shall have no responsibility if any such unauthorized change is made.

Fortenberry Lambert, Inc. may not divulge the material contents of the report, analytical findings or conclusions, or give a copy of the report to anyone other than the client or his designee as specified in writing except as may be required by the Appraisal Institute as they may request in confidence for ethics enforcement, or by a court of law or body with the power of subpoena.

TRADE SECRETS

This report was obtained from **Fortenberry Lambert, Inc.** and consists of "trade secrets and commercial or financial information" which is privileged and confidential and exempted from disclosure under 5 USC. 552 (b) (4) of the Uniform Commercial Code **Fortenberry Lambert, Inc.** shall be notified of any request to reproduce this report in whole or in part.

INFORMATION USED

The information furnished by others is believed to be reliable. However, no warranty is given for its accuracy.

TESTIMONY, CONSULTATION, COMPLETION OF CONTRACT FOR REPORT SERVICES

The contract for report, consultation, or analytical service is fulfilled and the total fee payable upon completion of the report, unless otherwise specified. **Fortenberry Lambert, Inc.** or those assisting in preparation of the report will not be asked or required to give testimony in court or hearing because

of having made the report, in full or in part, nor engage in post report consultation with client or third parties except under separate and special arrangement and at an additional fee. If testimony or deposition is required because of any subpoena, the client shall be responsible for any additional time, fees, and charges, regardless of issuing party.

EXHIBITS

The illustrations and maps in this report are included to assist the reader in visualizing the property and are not necessarily to scale. Various photographs, if any, are included for the same purpose as of the date of the photographs. Site plans are not surveys unless so designated.

LEGAL, ENGINEERING, FINANCIAL, STRUCTURAL OR MECHANICAL NATURE, HIDDEN COMPONENTS, SOIL

No responsibility is assumed for matters legal in character or nature, nor matters of survey, or of any architectural, structural, mechanical, or engineering nature. No opinion is rendered as to the title, which is presumed to be good and marketable. The property is appraised as if free and clear, unless otherwise stated in particular parts of the report. The legal description is assumed to be correct as used in this report as furnished by the client, his designee or as derived by **Fortenberry Lambert, Inc.**

Fortenberry Lambert, Inc. has inspected as far as possible, by observation, the land and the improvements; however, it was not possible to personally observe conditions beneath the soil, or hidden structural, mechanical or other components, and **Fortenberry Lambert, Inc.** shall not be responsible for defects in the property which may be related.

The report is based on there being no hidden, unapparent, or apparent conditions of the property site, subsoil or structures or toxic materials which would render it more or less valuable. No responsibility is assumed for any such conditions or for any expertise or engineering to discover them. All mechanical components are assumed to be in operable condition and status standard for properties of the subject type. Conditions of heating, cooling, ventilation, electrical, and plumbing equipment are considered to be commensurate with the condition of the balance of the improvements unless otherwise stated.

If **Fortenberry Lambert, Inc.** has not been supplied with a termite inspection, survey or occupancy permit, no responsibility or representation is assumed or made for any costs associated with obtaining same or for any deficiencies discovered before or after they are obtained. No representation or warranties are made concerning obtaining the above-mentioned items.

Fortenberry Lambert, Inc. assumes no responsibility for any costs or consequences arising due to the need, or the lack of need, for flood hazard insurance. An agent for The Federal Flood Insurance Program should be contacted to determine the actual need for Flood Hazard Insurance.

LEGALITY OF USE

The report is based on the premise that there is full compliance with all applicable federal, state and local environmental regulations and laws unless otherwise stated in the report; further, that all applicable zoning, building and use regulations, and restrictions of all types have been complied with unless otherwise stated in the report. Further, it is assumed that all required licenses, consents, permits, or other legislative or administrative authority, local, state, federal and/or private entity or organization have been or may be obtained or renewed for any use considered in the value estimate.

COMPONENT VALUES

The distribution of the total valuation in this report between land and improvements applies only under the existing program of utilization. The separate valuations for land and building must not be used in conjunction with any other report and are invalid if so used.

AUXILIARY AND RELATED STUDIES

No environmental or impact studies, special market study or analysis, highest and best use analysis, study or feasibility study has been required or made unless otherwise specified in an agreement for services or in the report.

DOLLAR VALUES, PURCHASING POWER

The market value estimated and the costs used are as of the date of the estimate of value, unless otherwise indicated. All dollar amounts are based on the purchasing power and price of the dollar as of the date of the value estimate.

INCLUSIONS

Furnishings and equipment or personal property or business operations, except as specifically indicated and typically considered as a part of real estate, have been disregarded with only the real estate being considered in the value estimate, unless otherwise stated. In some property types, business and real estate interests and values are combined.

PROPOSED IMPROVEMENTS, CONDITIONAL VALUE

Improvements proposed, if any, onsite or offsite, as well as any repairs required, are considered for purposes of this report to be completed in a timely, good and workmanlike manner, according to information submitted and/or considered by **Fortenberry Lambert, Inc.** In cases of proposed construction, the report is subject to change upon inspection of property after construction is completed.

VALUE CHANGE, DYNAMIC MARKET, INFLUENCES, ALTERATION OF ESTIMATE

The estimated value, which is defined in the report, is subject to change with market changes over time. Value is highly related to exposure, time, promotional effort, terms, motivation, and conditions surrounding the offering. The value estimate considers the productivity and relative attractiveness of the property physically and economically in the marketplace.

In cases of reports involving the capitalization of income benefits, the estimate of market value or investment value or value in use is a reflection of such benefits and **Fortenberry Lambert, Inc.'s** interpretation of income and yields and other factors derived from general and specific client and market information. Such estimates are as of the date of the estimate of value; thus, they are subject to change as the market and value is naturally dynamic.

The "estimate of market value" in the report is not based in whole or in part upon the race, color, or national origin of the present owners or occupants of the properties in the vicinity of the property appraised.

REPORT AND VALUE ESTIMATE

Report and value estimates are subject to change if physical or legal entity or financing differ from that envisioned in this report.

MANAGEMENT OF THE PROPERTY

It is assumed that the property that is the subject of this report will be under prudent and competent ownership and management.

HAZARDOUS MATERIALS

Unless otherwise stated in this report, the existence of hazardous substances, including without limitation, asbestos, polychlorinated biphenyls, petroleum leakage, or agricultural chemicals, which may or may not be present on the property, or other environmental conditions, were not called to the attention of nor did **Fortenberry Lambert, Inc.** become aware of such during their inspection. **Fortenberry Lambert, Inc.** had no knowledge of the existence of such materials on or in the property unless otherwise stated. **Fortenberry Lambert, Inc.**, however, is not qualified to test such substances

or conditions. If the presence of such substances such as asbestos, urea formaldehyde foam insulation, or other hazardous substances or environmental conditions, may affect the value of the property, the value estimate is predicated on the assumption that there is no such condition on or in the property or in the proximity that it would cause a loss in value. No responsibility is assumed for any such conditions, or for any expertise or engineering knowledge required to discover them.

SOIL AND SUBSOIL CONDITIONS

Unless otherwise stated in this report, **Fortenberry Lambert, Inc.** does not warrant the soil or subsoil conditions for toxic or hazardous waste materials. Where any suspected materials might be present, we have indicated in the report; however, **Fortenberry Lambert, Inc.** are not experts in this field and recommend appropriate engineering studies to monitor the presence or absence of these materials.

AMERICANS WITH DISABILITIES ACT (ADA)

Fortenberry Lambert, Inc. has not made a specific compliance survey and analysis of this property to determine whether or not it is in conformity with the various detailed requirements of the Americans with Disabilities Act ("ADA"), which became effective January 26, 1992. It is possible that a compliance survey of the property together with a detailed analysis of the requirements of the ADA could reveal that the property is not in compliance with one or more of the requirements of the Act. If so, this fact could have a negative effect upon the value of the property. Since **Fortenberry Lambert, Inc.** has no direct evidence relating to this issue, we did not consider possible non-compliance with the requirements of ADA in estimating the value of the property."

DEED/LEGAL DESCRIPTION

5476
0914

FILED
UNION COUNTY, NC
CRYSTAL CRUMP
REGISTER OF DEEDS

FILED Jan 14, 2011
AT 04:06 pm
BOOK 05476
START PAGE 0914
END PAGE 0916
INSTRUMENT # 01202
EXCISE TAX \$2,322.00
SB

NORTH CAROLINA GENERAL WARRANTY DEED

Excise Tax: **\$2,322.00**

Parcel Identifier No. **02-202-008** Verified by _____ County on the ____ day of _____, 20____
By: _____

Mail/Box to: **Hamilton Moon Stephens Steele & Martin, PLLC, 201 South College Street, Suite 2020, Charlotte, NC 28244**

This instrument was prepared by: **J. Bennett Glass, P.A., Attorney at Law**

Brief description for the Index: **161.03 acres on Mills Harris Road**

THIS DEED made this **30th** day of **December, 2010**, by and between

GRANTOR	GRANTEE
H & T, LLC, a North Carolina limited liability company	Union County, North Carolina 500 North Main Street Monroe, NC 28112

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

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

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

**SEE ATTACHED EXHIBIT "A" FOR METES AND BOUNDS DESCRIPTION
INCORPORATED HEREIN BY THIS REFERENCE.**

5476
0915

The property hereinabove described was acquired by Grantor by instrument recorded in Book 4856, page 48.

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

And the Grantor covenants with the Grantee, that Grantor is seized of the premises in fee simple, has the right to convey the same in fee simple, that title is marketable and free and clear of all encumbrances, and that Grantor will warrant and defend the title against the lawful claims of all persons whomsoever, other than the following exceptions:

Right of way of Mills Harris Road and any easements and rights of way for public utilities which cross the property.

IN WITNESS WHEREOF, the Grantor has duly executed the foregoing as of the day and year first above written.

H & T, LLC, a North Carolina limited liability company

By: [Signature]
Toan Vu, Member/Manager

By: [Signature]
Hoan Van Nguyen, Member/Manager

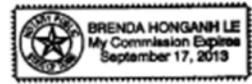


SEAL-STAMP State of North Carolina – County of Union

I, Leslie G. Helms, a Notary Public of the County and State aforesaid, certify that Toan Vu personally came before me this day and acknowledged that he is Member/Manager of H & T, LLC, a North Carolina limited liability company, and that he as Member/Manager, being authorized to do so, executed the foregoing instrument on behalf of the company. Witness my hand and official stamp or seal, this 6th day of January, 2011.
My Commission Expires: May 8, 2011
[Signature]
Notary Public

SEAL-STAMP State of Texas – County of TRAVIS

I, Brenda Honganh Le, a Notary Public of the County and State aforesaid, certify that Hoan Van Nguyen personally came before me this day and acknowledged that he is Member/Manager of H & T, LLC, a North Carolina limited liability company, and that he as Member/Manager, being authorized to do so, executed the foregoing instrument on behalf of the corporation. Witness my hand and official stamp or seal, this 5th day of January, 2011.
My Commission Expires: September 17, 2013
[Signature]
Notary Public



**EXHIBIT "A" TO NORTH CAROLINA GENERAL WARRANTY DEED
FROM H & T, LLC, A NORTH CAROLINA LIMITED LIABILITY COMPANY
TO UNION COUNTY, NORTH CAROLINA
DATED DECEMBER 30, 2010**

BEGINNING at a PK nail found in the center of the right of way of SR 1645 (known as Mills-Harris Road), said PK nail being located at the southwest corner of the property, now or formerly, of Tony Dale Medlin and Dotty Lynn Medlin, Trustees (Book 4650, Page 473, Union County Registry) and running with the Medlin property North 83 degrees 45 minutes 43 seconds East (crossing an iron found at 30.80 feet and an iron found at 1,165.41 feet) a total distance of 1,205.31 feet to a point in the center of the channel of Jacks Branch; thence with the center of the channel of Jacks Branch as follows: (1) North 22 degrees 08 minutes 04 seconds West 10.22 feet; (2) North 09 degrees 28 minutes 44 seconds East 27.97 feet; (3) North 40 degrees 29 minutes 51 seconds East 32.22 feet; (4) North 61 degrees 32 minutes 12 seconds East 50.49 feet; (5) North 86 degrees 00 minutes 16 seconds East 11.48 feet; (6) North 69 degrees 24 minutes 46 seconds East 18.81 feet; (7) North 04 degrees 18 minutes 00 seconds East 21.38 feet; (8) North 23 degrees 02 minutes 59 seconds East 17.03 feet; (9) North 70 degrees 54 minutes 58 seconds East 12.20 feet; (10) North 55 degrees 41 minutes 41 seconds East 38.27 feet; (11) North 81 degrees 20 minutes 57 seconds East 42.90 feet; (12) North 44 degrees 05 minutes 13 seconds East 28.74 feet; (13) North 51 degrees 15 minutes 16 seconds East 24.73 feet; (14) South 72 degrees 50 minutes 01 second East 9.89 feet; (15) North 71 degrees 32 minutes 52 seconds East 36.80 feet; (16) North 66 degrees 13 minutes 01 second East 55.87 feet; (17) North 67 degrees 14 minutes 51 seconds East 24.34 feet to an axle found in the center of Jacks Branch and in the western boundary line of the property, now or formerly, of Nora K. Davis (Book 1646, Page 444, Union County Registry); thence with the Davis property as follows: (1) South 06 degrees 38 minutes 24 seconds East 1,485.99 feet to a found axle; (2) North 87 degrees 09 minutes 17 seconds East 45.66 feet to a found iron, a corner of the property, now or formerly, of Holly Farms Foods, Inc. (Book 1769, Page 526, Union County Registry); thence with the property of Holly Farms Foods, Inc. as follows: (1) South 02 degrees 19 minutes 30 seconds West 1,820.83 feet to a found iron pipe; (2) South 73 degrees 19 minutes 38 seconds West 657.82 feet to a found axle; (3) South 12 degrees 16 minutes 32 seconds East 562.73 feet to a found axle; (4) South 73 degrees 34 minutes 28 seconds West 1,648.91 feet to a found iron, a corner of the property, now or formerly, of Charles R. Glass and wife, Denise P. Glass (Book 5289, Page 418, Union County Registry); thence with the eastern boundary line of the Glass property North 01 degree 19 minutes 40 seconds West 284.07 feet to a found iron, a corner of the property, now or formerly, of Glass Farms, LLC (Book 5409, Page 742, Union County Registry); thence with the eastern boundary line of the property, now or formerly, of Glass Farms, LLC North 01 degree 19 minutes 40 seconds West 515.93 feet to a found iron, a corner of the property, now or formerly, of Sandra C. Plowman and Melody C. Trout (Book 4918, Page 907, Union County Registry); thence with the eastern boundary line of the Plowman and Trout property North 01 degree 19 minutes 40 seconds West 557.80 feet to a found iron, a corner of the property, now or formerly, of Patricia M. Haigler and husband, Wade F. Haigler (Book 1040, Page 217, Union County Registry); thence with the eastern boundary line of the Haigler property North 01 degree 19 minutes 40 seconds West 449.35 feet to a found iron, a corner of the property, now or formerly, of Tony Dale Medlin and Dotty Lynn Medlin, Trustees (Book 4650, Page 465, Union County Registry); thence with the eastern boundary line of the Medlin property North 01 degrees 19 minutes 40 seconds West 27.53 feet to a found iron, a corner of the property, now or formerly, of Tony Dale Medlin and Dotty Lynn Medlin, Trustees (Book 4650, Page 457, Union County Registry); thence with the Medlin property as follows: (1) South 89 degrees 28 minutes 02 seconds East 343.65 feet to a found iron; (2) North 13 degrees 33 minutes 35 seconds East 424.03 feet to a found iron; (3) South 88 degrees 47 minutes 05 seconds West 52.81 feet to a found iron, a corner of the property, now or formerly, of Eric Mark Rummage and Pamela High (Book 415, Page 563, Union County Registry); thence with the Rummage and High property as follows: (1) North 04 degrees 52 minutes 24 seconds East 733.08 feet to a found iron; (2) North 81 degrees 00 minutes 03 seconds West 489.69 feet to an angle iron found at the corner of the property, now or formerly, of Linda M. Grubb (Book 470, Page 867, Union County Registry); thence with the Grubb property North 45 degrees 59 minutes 12 seconds West 302.48 feet to a PK nail found in the center of the right of way of SR 1645; thence with the center of the right of way of SR 1645 as follows: (1) North 07 degrees 54 minutes 24 seconds East 65.68 feet; (2) North 07 degrees 58 minutes 50 seconds East 91.56 feet; (3) North 07 degrees 52 minutes 03 seconds East 95.93 feet; (4) North 07 degrees 46 minutes 21 seconds East 152.01 feet; (5) North 08 degrees 06 minutes 32 seconds East 152.79 feet; (6) North 07 degrees 52 minutes 31 seconds East 102.62 feet; (7) North 08 degrees 04 minutes 24 seconds East 100.11 feet; (8) North 07 degrees 58 minutes 11 seconds East 81.81 feet to the BEGINNING PK nail and containing 161.03 acres, more or less, as shown on copy of unrecorded map of survey prepared by F. Donald Lawrence, NCPLS, of Lawrence Associates dated December 13, 2010.

TAX CARD

Parcel Number

02202008B

Owner

MEDLIN TONY DALE TRUSTEE
 MEDLIN DOTY LYNN TRUSTEE

Mailing Address

1320 MILLS HARRIS RD
 WINGATE
 NC, 28174

**Account Information**

Land Value	\$146,000.00	Description	MEDLIN OPCM515
Building Value	\$79,200.00	Situs Address	1516 MILLS HARRIS RD
Total Value	\$225,200.00	Property Class	FARM
Acreage	23.4200		

Sales Information

Sale Date	Sale Amount	Book & Page	Grantor
08/09/2007	\$0.00	4650 473	MEDLIN TONY DALE
11/19/2001	\$100,000.00	1691 607	MEDLIN JOHNSIE H

Location Information

Municipal Administration	Union County	12 Mile Service Area	No
County Zoning Code	RA-40	School	School Assignment Information
Zoning Administration	Union County	Census Tract Number	208
ETJ		FEMA Panel	5476
Fire District	Wingate	FEMA Zone	,AE
Soils	CmB,GsC,BdB2		

Building Information [View Real Property Site](#)

Total Living Area	1730
Year Build	1900

District Voting Assignments (Jurisdictions)

Polling Place	CROSSROADS AME ZION CHURCH	School District	4	Congressional District	9
Precinct District	#36	State House	55	Senate District	29

QUALIFICATIONS AND LICENSES

QUALIFICATIONS

Sarah E. Lak

Fortenberry Lambert, Inc.

1213 West Morehead Street, 5th Floor, Charlotte, North Carolina 28208

Phone: (704)375-1032 sarah@fortenberrylambert.com

EDUCATIONAL BACKGROUND

Grand Canyon University

Business Management – 2015 to Present

Phoenix, Arizona

North Carolina State University

Animal Science – 1998 to 1999

Raleigh, North Carolina

Creative Education, LLC

Courses Completed

R-1 Basic Appraisal Principles

R-2 Basic Appraisal Procedures

R-3 Market Analysis/Highest & Best Use

R-4 USPAP National Course

Gastonia, North Carolina

REAL ESTATE ANALYSIS EXPERIENCE

Fortenberry Lambert, Inc.

Registered Trainee Appraiser

Commercial real estate consulting and appraisal. Provide commercial appraisal services, financial analyses, and highest and best use studies to commercial real estate owners, developers, financial institutions, and public agencies.

Charlotte, North Carolina

Bryant & Rutledge, LLC

Registered Trainee Appraiser

Commercial real estate consulting and appraisal. Provide commercial appraisal services, financial analyses, and highest and best use studies to commercial real estate owners, developers, financial institutions, and public agencies.

Charlotte, North Carolina

PROFESSIONAL AFFILIATIONS

North Carolina State Registered Trainee Real Estate Appraiser, License No. T5345

Notary Public, North Carolina



QUALIFICATIONS

Mark Thomas Lambert, MAI, AI-GRS

Fortenberry Lambert, Inc.

1213 West Morehead Street, 5th Floor, Charlotte, North Carolina 28208

(704) 375-1032, Extension 706 Cell: (704) 650-6271 mark@fortenberrylambert.com

REAL ESTATE APPRAISAL AND ANALYSIS EXPERIENCE

Fortenberry Lambert, Inc.

Charlotte, North Carolina

Partner

Commercial real estate consulting and appraisal. Opened firm in January 2001. Provide real estate services to developers, property owners, and financial clients. Services include valuation, market/feasibility analysis. Specialist in multi-tenant lease-by-lease, and discounted cash flow analysis using *Argus* software.

Lambert Consulting

Charlotte, North Carolina

Owner

Commercial real estate consulting and appraisal. Provided real estate services to developer, property owner, and financial clients. Opened firm in 1996.

TB Harris, Jr., & Associates

Charlotte, North Carolina

Vice President

Provided appraisal services.

The Rouse Company

Columbia, Maryland

Research Analyst

Worked as an in-house consultant for three divisions: Retail Development/Acquisitions, Office and Community Development, and Operating Properties. Responsibilities included locating and analyzing potential sites for retail and/or office developments and involvement in the management, operations, marketing and leasing for 15 regional malls and mixed-use developments within the Rouse portfolio.

The Hahn Company

San Diego, California

Market Analyst Intern

Market feasibility and site analysis for an 800,000-square-foot shopping center proposed to be developed at the University Place mixed-use complex in northeast Mecklenburg County, North Carolina.

Charlotte-Mecklenburg Planning Commission

Charlotte, North Carolina

Intern

Worked part-time while in graduate school researching demographic data and working on various district plans, small area plans, and special projects.

EDUCATION

Texas A&M University, College Station, Texas

Bachelor of Science, Renewable Natural Resources 1985

University of North Carolina at Charlotte, Charlotte, North Carolina

Post-Graduate, Department of Geography & Earth Sciences

Location Analysis - Real Estate

Mark Thomas Lambert, MAI, AI-GRS

Fortenberry Lambert, Inc.

1213 West Morehead Street, 5th Floor, Charlotte, North Carolina 28208

(704) 375-1032, Extension 706 Cell: (704) 650-6271 mark@fortenberrylambert.com

APPRAISAL EDUCATION

**The Appraisal Institute
Courses Completed**

- 1A-1 Real Estate Appraisal Principles
- 1A-2 Basic Valuation Procedures
- 1B-A Income Capitalization - Part A
- 1B-B Income Capitalization - Part B
- 550 Advanced Applications
- II 540 Report Writing and Valuation Analysis
- Standards of Professional Practice
- Review Theory
- Continuing Education Requirements - Current

AFFILIATIONS AND ACTIVITIES

- The Appraisal Institute, MAI
- The Appraisal Institute, AI-GRS
- North Carolina State Certified General Real Estate Appraiser #A3572
- South Carolina State Certified General Real Estate Appraiser #CG3415
- Appraisal Institute Metrolina Chapter Advisory Board (Past)
- Building Owners and Managers Association
- Charlotte Region Realtor Association
- ClareHaven Neighborhood – past President
- Big Brothers Big Sisters of Greater Charlotte, past Big Brother
- Dowd YMCA ABLE Reading Literacy Volunteer
- Mecklenburg Aquatic Club (MAC) – past Board Member
- Stingray Aquatics – past Board Member
- USA Swimming/US Masters Swimming – Member
- North Carolina Special Olympics - Certified Swim Coach
- Cabarrus County Special Olympics –Swim Coach
- Certified Red Cross Lifeguard



FORTENBERRY LAMBERT

1213 WEST MOREHEAD STREET, 5TH FLOOR, CHARLOTTE, NORTH CAROLINA 28208 704-375-1032

sarah@fortenberrylambert.com mark@fortenberrylambert.com

NATURAL RESOURCE ASSESSMENT AND AQUATIC RESOURCES DELINEATION

WINGATE SUBSTATION

PIKE PROJECT NO. 24-35601-000-05

UNION COUNTY, NC



FEBRUARY 2025

Prepared For:



UNION POWER COOPERATIVE
1525 North Rocky River Road
Monroe, North Carolina 28110

Prepared by:



PIKE ENGINEERING
123 North White Street
Fort Mill, SC 29715

P: 803-835-7820 • F: 803-835-7824 • www.pike.com

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Abbreviations

CCA	Candidate Conservation Agreement
CDP	Census-designated Place
CWA	Clean Water Act
DBH	Diameter Base Height
DHEC	South Carolina Department of Health and Environmental Control
DWM	North Carolina Division of Waste Management
DWR	North Carolina Division of Water Resources
EPA	U.S. Environmental Protection Agency
FEMA	Federal Emergency Management Agency
FIRM	Flood Insurance Rate Map
IPaC	Information Planning and Conservation Service
JD	Jurisdictional Determination
NCDEQ	North Carolina Department of Environmental Quality
NRA	Natural Resource Assessment
NRCS	Natural Resource Conservation Service
PSA	Project Study Area
RHA	Rivers and Harbors Act
ROW	Right-of-way
SCNHP	South Carolina Natural Heritage Program
Str	Structure
USACE	U.S. Army Corps of Engineers
USDA	U.S. Department of Agriculture
USFWS	U.S. Fish & Wildlife Service
WOTUS	Waters of the U.S.

1 INTRODUCTION

On behalf of Union Power Cooperative (“Union Power”), Pike Engineering (“Pike”) conducted a Natural Resource Assessment (NRA) and Aquatic Resources Delineation for a project known as “Wingate Substation”. The NRA included an office review of natural resource databases, Federal- and State-listed species databases, and field surveys to determine the extent of jurisdictional aquatic resources and the presence or absence of potentially suitable habitat and occurrences of federal- and state-listed species.

Field surveys were conducted in January 2025 by Pike staff. Aquatic resources were sequentially flagged by feature type, with blue and yellow flagging representing stream centerlines. The extent of aquatic resources was documented using a GPS unit with sub-meter accuracy, such as a Trimble GeoExplorer 3000 Series or similar device.

2 LOCATION OF THE PROJECT STUDY AREA

For the purpose of this report, the Project Study Area (PSA) consists of an approximate 19-acre site, as depicted in **Appendix A, Figure 1**. The PSA lies in Wingate in eastern Union County, North Carolina.

3 EXISTING CONDITIONS

3.1 Vegetation

The PSA contained several different vegetation communities. These include forested areas and monocrops. Based upon the Classification of the Natural Communities of North Carolina – Fourth Approximation (Schafale, 2012), forested portions of the site can be characterized as Mesic Mixed Hardwood (Piedmont Subtype).

The forested areas were composed of loblolly pine (*Pinus taeda*), eastern red cedar (*Juniperus virginiana*), sweetgum (*Liquidambar styraciflua*), tulip poplar (*Liriodendron tulipifera*), red maple (*Acer rubrum*), winged elm (*Ulmus alata*), willow oak (*Quercus phellos*), hackberry (*Celtis occidentalis*), and Chinese privet (*Ligustrum sinense*).

3.2 Topography

Pike utilized the United States Geological Survey (USGS) topographic quadrangle information to evaluate naturally occurring topographic characteristics of the greater region and elements occurring within the PSA. Frequently, tributaries have been historically identified and are represented on topographic quadrangles with flow regimes determined at the time the maps were produced; this information can be utilized to track changes to hydrology in the region and within the PSA. Often, local or state buffers utilize USGS topographic quadrangles to apply buffers to tributaries. In instances where flow regimes depicted on USGS topographic quadrangles are inconsistent with flow regimes determined during a field assessment, the data obtained during a field assessment is generally more accurate in representing existing conditions. **Appendix A, Figure 2** shows the mapped USGS topographic quadrangle relative to the PSA.

3.3 Soils

Pike utilized the United States Department of Agriculture (USDA) Natural Resources Conservation Service (NRCS) web soil survey and ‘National Hydric Soils List’ (USDA Natural Resource Conservation Service) to determine soil types mapped as occurring within the PSA (**Appendix A, Figure 3**). Table 3-1 shows soil map

units, a description of the map unit, their hydric status, the area covered by a particular map unit, and the percentage of the PSA covered by the map unit.

Table 3-1 Soils within PSA.

Map Unit Symbol	Description	Hydric Status	Area (ac)	Percentage
CmB	Cid channery silt loam, 1 to 5 percent slopes	Nonhydric	5	26.6
GoC	Goldston very channery silt loam, 4 to 15 percent slopes	Nonhydric	3	16.1
GsB	Goldston-Badin complex, 2 to 8 percent slopes	Nonhydric	10.7	57.3
Totals			18.7	100.0

3.4 Federal Emergency Management Agency (FEMA) Flood Hazard Layers

Flood hazard areas identified on the Flood Insurance Rate Map are identified as a Special Flood Hazard Area (SFHA). SFHA are defined as the area that will be inundated by the flood event having a 1-percent chance of being equaled or exceeded in any given year. The 1-percent annual chance flood is also referred to as the base flood or 100-year flood. SFHAs are labeled as Zone A, Zone AO, Zone AH, Zones A1-A30, Zone AE, Zone A99, Zone AR, Zone AR/AE, Zone AR/AO, Zone AR/A1-A30, Zone AR/A, Zone V, Zone VE, and Zones V1-V30. Moderate flood hazard areas, labeled Zone B or Zone X (shaded) are also shown on the FIRM, and are the areas between the limits of the base flood and the 0.2-percent-annual-chance (or 500-year) flood. The areas of minimal flood hazard, which are the areas outside the SFHA and higher than the elevation of the 0.2-percent-annual-chance flood, are labeled Zone C or Zone X (Federal Emergency Management Agency, 2020). FEMA mapped flood hazard areas are shown on **Appendix A, Figure 4**.

3.5 Water Quality

The North Carolina Surface Water Classification and Water Supply Watershed databases were used to determine surface water classifications and water quality concerns within the PSA. The site is entirely contained in the Yadkin Pee Dee Basin (Hydrologic Unit Code 03040105). The North Carolina Surface Water Classification states Jacks Branch, located just west of the study area, is classified as a Class C surface water. These waters are protected for uses such as aquatic life propagation, survival and maintenance of biological integrity (including fishing and fish), wildlife, secondary contact recreation, and agriculture. Secondary contact recreation means wading, boating, other uses not involving human body contact with water, and activities involving human body contact with water where such activities take place on an infrequent, unorganized, or incidental basis.

According to the Water Supply Watershed, none of the streams contained within the PSA are classified or fall within a water supply watershed. None of the surface waters are identified as being 303(d) impaired waters, waters of concern, or subject to water advisories. Based on those factors, no known water quality concerns occur in the PSA.

4 JURISDICTIONAL WETLANDS AND WATERS

4.1 Methodology

A delineation of wetlands and other surface waters was performed within the PSA to identify aquatic features that may be subject to the jurisdiction of the United States Army Corps of Engineers (USACE) as “Waters of the United States” (also known as “waters of the U.S.”, or “WOTUS”), in accordance with the Federal Clean Water Act, 33 U.S.C. § 1251 et seq. (CWA), and Section 10 of the Rivers and Harbors Act (RHA) of 1899, 33 U.S.C. 401 § 403. Section 404 of the CWA authorizes the USACE to regulate, which includes permitting, temporary and permanent discharges of dredged or fill material into WOTUS.

Wetlands are described by the USACE (33 C.F.R. § 328.3) and the United States Environmental Protection Agency (USEPA) (40 C.F.R. § 230.3) as “those areas that are inundated or saturated by surface or groundwater at a frequency or duration sufficient to support, and that under normal circumstances does support, a prevalence of vegetation typically adapted for life in saturated soil conditions. Wetlands generally include swamps, marshes, bogs, and similar areas” (33 C.F.R. § 328.3; 40 C.F.R. § 230.3). From this regulatory definition, a three-parameter approach (i.e., vegetation, soils, and hydrology) was developed by the USACE to identify and delineate wetlands for purposes of Section 404 of the CWA and Section 10 of the RHA (33 U.S.C. 403). This approach requires positive verification of the presence of wetland hydrology, hydrophytic vegetation, and hydric soils as precursors for an area to be determined a wetland.

The field evaluation was conducted using methods consistent with those described in the *Regional Supplement to the Corps of Engineers Wetland Delineation Manual: Eastern Mountains and Piedmont Region* (U.S. Army Corps of Engineers, 2012); and *Corps of Engineers Wetlands Delineation Manual* (U.S. Army Corps of Engineers, 1987). Where differences occur in the two documents, the regional supplement takes precedence over the *1987 Manual* for applications in the Eastern Mountains and Piedmont region. This delineation, and the associated data collected, supports a request for a Jurisdictional Determination (JD) to USACE if project-related impacts to WOTUS are required.

The North Carolina Department of Environmental Quality (NCDEQ) Division of Water Resources (DWR) stream evaluation methods described in *Methodology for Identification of Intermittent and Perennial Streams and Their Origins* (Version 4.11), effective September 1, 2010, were used to conduct stream flow regime assessments of tributaries identified within the PSA. Stream evaluations included a qualitative review of channel characteristics for purposes of documenting ephemeral, intermittent, or perennial flow regimes, and assessing their jurisdictional status accordingly.

4.2 Delineation Results

Pike conducted a delineation of streams, wetlands, and open waters within the PSA in January 2025. Green and blue flagging was used to identify streams. **Appendix A, Figure 5** illustrates the results of the delineation. Photographs documenting aquatic resources are included in **Appendix B**.

4.2.1. Wetlands

No areas within the PSA met the three wetland criteria of vegetation, hydric soils, and hydrology; therefore, wetlands are not present within the PSA.

4.2.2. Streams

One stream was identified within the PSA (**Appendix A, Figure 5**). Streams exhibited well-defined channel bed and bank with consistent ordinary high-water mark indicators.

Table 4-2 lists streams by their corresponding unique identification used during the field survey, including average width at ordinary high-water mark (OHWM) and flow regime. Streams are depicted on **Appendix A, Figure 5**.

Table 4-1 Streams Identified within the PSA.

Stream ID	Approximate Reach in PSA (Linear Feet)	Flow Regime	Average Width at OHWM (Feet)	Latitude	Longitude
Stream 1	1,073	Intermittent	3	35.0194336°N	80.4104388°W
Total	~1,073 linear feet				

4.3 Jurisdictional Assessment under Clean Water Act Section 404

“Waters of the United States” is a threshold term used in the CWA and establishes the geographic scope of federal jurisdiction under the Act. Sections 404 and 401 of the CWA regulates the discharge of dredged or fill material into “Waters of the US”; therefore, aquatic resources assessed as meeting the definition of WOTUS are subject to the regulations and permitting requirements set forth within the Act. USACE is the permitting authority for implementation of the CWA and administers the permitting program that regulates permanent or temporary discharges of dredged or fill materials into WOTUS (U.S. Environmental Protection Agency, 2023).

Pike believes each of the aquatic resources identified in the delineation are jurisdictional under the current definition of WOTUS and are therefore subject to regulation under CWA Sections 404 and 401. All features are relatively permanent waters, which are consistent with the current definition of regulated WOTUS.

Findings assessing the jurisdictional status of potential Waters of the U.S. are subject to verification and modification by USACE and are subject to change based on the Clean Water Act rules, amendments, and guidance effective at the time of site development. The findings within this report can be used to support a Jurisdictional Determination or Delineation Concurrence to USACE, should one be requested or required.

5 FEDERAL PROTECTED SPECIES

5.1 Methodology

Species with the federal classification of endangered, threatened, proposed endangered or threatened, and final (or proposed) designated critical habitat are protected under the Endangered Species Act of 1973, 16 U.S.C. §§ 1531-1544 et seq. No activity can be authorized by a federal permit or action if the continued existence of a federally-listed species would be jeopardized, or its critical habitat destroyed or adversely modified, by the proposed activity or action.

Pike used the USFWS Information Planning and Conservation System (IPaC) tool to identify federally protected species that may occur within the PSA, and a species list was generated for the proposed project (**Appendix C, USFWS Species List**).

The IPaC report identifies three Endangered species and one Proposed Threatened species that may occur within the PSA. The IPaC report identified no Designated or Proposed Critical Habitats within the PSA.

Table 5-1 lists species identified by the USFWS IPaC tool as potentially occurring in the PSA or within a one-mile radius of the PSA, and that were included in the site evaluation.

Table 5-1 Threatened and Endangered Species that May Occur Within the PSA

Listed Species	Protection Status (T, E, P, C)	USFWS Optimal Survey Window ¹
Carolina Heelsplitter (<i>Lasmigona decorata</i>)	E	N/A
Monarch Butterfly (<i>Danaus plexippus</i>)	P	N/A
Michaux’s Sumac (<i>Rhus michauxii</i>)	E	May-October
Schweinitz’s Sunflower (<i>Helianthus schweinitzii</i>)	E	Late August-October

E Federally Endangered
 P Proposed for Listing in Federal Register

5.2 Species and Habitat Descriptions

5.2.1. Carolina Heelsplitter (*Lasmigona decorata*)

The Carolina heelsplitter is a rare species of freshwater mussel endemic to the Carolinas. Preferred habitat consists of well-oxygenated water with low pollutant levels. It is thought that stable stream bottoms area critical to the species. Stable populations have been found in streams where banks are stable and well vegetated with trees and shrubs.

5.2.2. Monarch Butterfly (*Danaus plexippus*)

The monarch is a large-winged invertebrate. Most of the wings are bright orange edged by black borders and veins on top, and pale orange underneath. Within the black border are two rows of white spots. Bodies of Monarchs have black and white markings. Monarchs reach approximately three to four inches in width and length. Monarchs undergo a complete metamorphosis, from egg, to larva (caterpillar), to pupa (chrysalis), and then to adult (butterfly). Adult Monarchs lay their eggs exclusively on milkweed (*Asclepias* spp.) species. These eggs hatch after three to five days and the larva feed on the leaves of the host plant (milkweed). The monarch’s preferred habitat is within sufficiently large populations of milkweed to support host and feeding groups. The milkweeds grow in a variety of habitats, swamps and uplands, with adequate sunshine and minimal physical disturbance (such as mowing or plowing) (U.S. Fish & Wildlife Service, 2023).

5.2.3. Schweinitz’s Sunflower (*Helianthus schweinitzii*)

Habitat for Schweinitz’s Sunflower includes clearings and edges of upland woods, thickets, and pastures. The species is found along roadsides, powerline clearings, old pastures, and woodland openings. Schweinitz’s Sunflower requires disturbance (blowdowns, storm, or fire) to create open areas for full sunlight, but may also grow in open stands of trees with minimal shade. Soils may be either shallow, sandy with high gravel content, or a clayey hardpan. The sunflower may prefer soils derived from basic material (Krings, Goyette, Suiter, & Samuels, 2021).

¹ Refer to <https://www.fws.gov/story/2022-06/south-carolinas-federally-threatened-endangered-and-risk-plant-species>

5.2.4. Michaux’s Sumac (*Rhus michauxii*)

Michaux’s Sumac grows in sandy or rocky open woods on sandy or sandy loam soils with low cation exchange capacities and appears to depend on some form of disturbance to maintain the open quality of its habitat. This disturbance may be in the form of fire, wind throws, or openings created by roads, railroads and utility rights of way (U.S. Fish & Wildlife Service, Southeast Region, Raleigh Ecological Services Field Office, 2021).

5.3 Habitat Evaluation and Species Survey Results

5.3.1. Carolina Heelsplitter

There are no perennial streams located within the PSA, therefore suitable habitat for Carolina heelsplitter is not present.

5.3.2. Monarch Butterfly

Potentially suitable habitat is present within unmanaged grassland and prairie areas of the PSA (i.e. early successional growth areas, and areas generally maintained in herbaceous conditions with minimal management within existing ROW). If disturbance to potentially suitable habitat is necessary, targeted surveys for the species and/or coordination with USFWS to determine potential species effects may be needed should the species become uplisted to federally Threatened status.

5.3.3. Schweinitz’s Sunflower

Areas of open habitat within the existing ROW and along the forest edges contain marginally suitable habitat for Schweinitz’s Sunflower, specifically those areas with lower density of competing species. No varieties of *Helianthus* were observed during the field evaluation. Because marginally suitable habitat is present, but the field evaluation yielded negative survey results, Pike believes there will be no effect to this species.

5.3.4. Michaux’s Sumac

Areas of open habitat within the existing ROW and along the forest edges contain marginally suitable habitat for Michaux’s sumac, specifically those areas with lower density of competing species. No varieties of *Rhus* were observed during the field evaluation. Because marginally suitable habitat is present, but the field evaluation yielded negative survey results, Pike believes there will be no effect to this species.

Table 5-2 Habitat and Species Survey Results

Listed Species	Designated Critical Habitat? (Y, N)	PSA Inside Designated Critical Habitat? (Y, N, N/A)	Suitable Habitat Present in PSA? (Y/N)	Species Identified in PSA? (Y, N, N/A)
Carolina Heelsplitter	Y	N	N	N
Monarch Butterfly	N	N/A	Y	N
Michaux’s Sumac	N	N/A	Y	N

Listed Species	Designated Critical Habitat? (Y, N)	PSA Inside Designated Critical Habitat? (Y, N, N/A)	Suitable Habitat Present in PSA? (Y/N)	Species Identified in PSA? (Y, N, N/A)
Schweinitz's Sunflower	N	N/A	Y	N

Potential impacts of a proposed project must be reconsidered if new information reveals that those impacts may affect any listed species or critical habitat in a manner not previously considered, if the proposed project is modified in a manner that was not considered in the effect determination, or if a new species is listed or critical habitat is designated that may be affected by the proposed project.

6 RECOMMENDATIONS

On behalf of Union Power, Pike Engineering has completed a Natural Resource Assessment, including an aquatic resources delineation and protected species assessment, for a project known as Wingate Substation. A delineation of the Project Study Area resulted in positive identification of aquatic resources. Pike's assessment is that the aquatic resources identified are subject to regulation by the U.S. Army Corps of Engineers under Sections 404 and 401 of the Clean Water Act. A protected species and habitat survey of the PSA identified potentially suitable habitat for species known to occur in the county, but no occurrences were identified. Comprehensive surveys for Monarch Butterfly were not performed.

Pike's general recommendation is to avoid and minimize impacts to jurisdictional aquatic resources to the maximum extent practicable. Should temporary or permanent impacts be necessary, it is possible the project can utilize a Nationwide Permit 57 (Electric Utility Line and Telecommunications Activities) if project construction and design efforts implement measures consistent with the Nationwide Permit General and Regional Conditions.

If the proposed project requires acquisition of a federal permit, targeted surveys for monarch butterfly may be needed, particularly if the species is formally uplisted from "Proposed Threatened" to "Threatened" under the Endangered Species Act. Given the pending uplisting of the species, Pike may recommend proactive coordination with USFWS to evaluate potential presence/absence survey options, depending on project timelines.



Pike is pleased to present the results of our Natural Resource Assessment and Aquatic Resources Delineation for the Wingate Substation. Please do not hesitate to contact us should you have questions or concerns regarding the report.

Sincerely,

A handwritten signature in black ink that reads "Megan Bollero".

Megan Bollero, PWS
Senior Environmental Scientist
mbollero@pike.com
(757) 576-6433

A handwritten signature in black ink that reads "Meagan Jolly".

Meagan Jolly, PWS
Senior Environmental Scientist
kjolly@pike.com
(704) 681-3479

7 REFERENCES

- Federal Emergency Management Agency. (2020, July 8). *Flood Zones*. Retrieved from FEMA: [https://www.fema.gov/glossary/flood-zones#:~:text=Moderate%20flood%20hazard%20areas%2C%20labeled,or%20500%2Dyear\)%20flood.](https://www.fema.gov/glossary/flood-zones#:~:text=Moderate%20flood%20hazard%20areas%2C%20labeled,or%20500%2Dyear)%20flood.)
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Appendix A

Figures

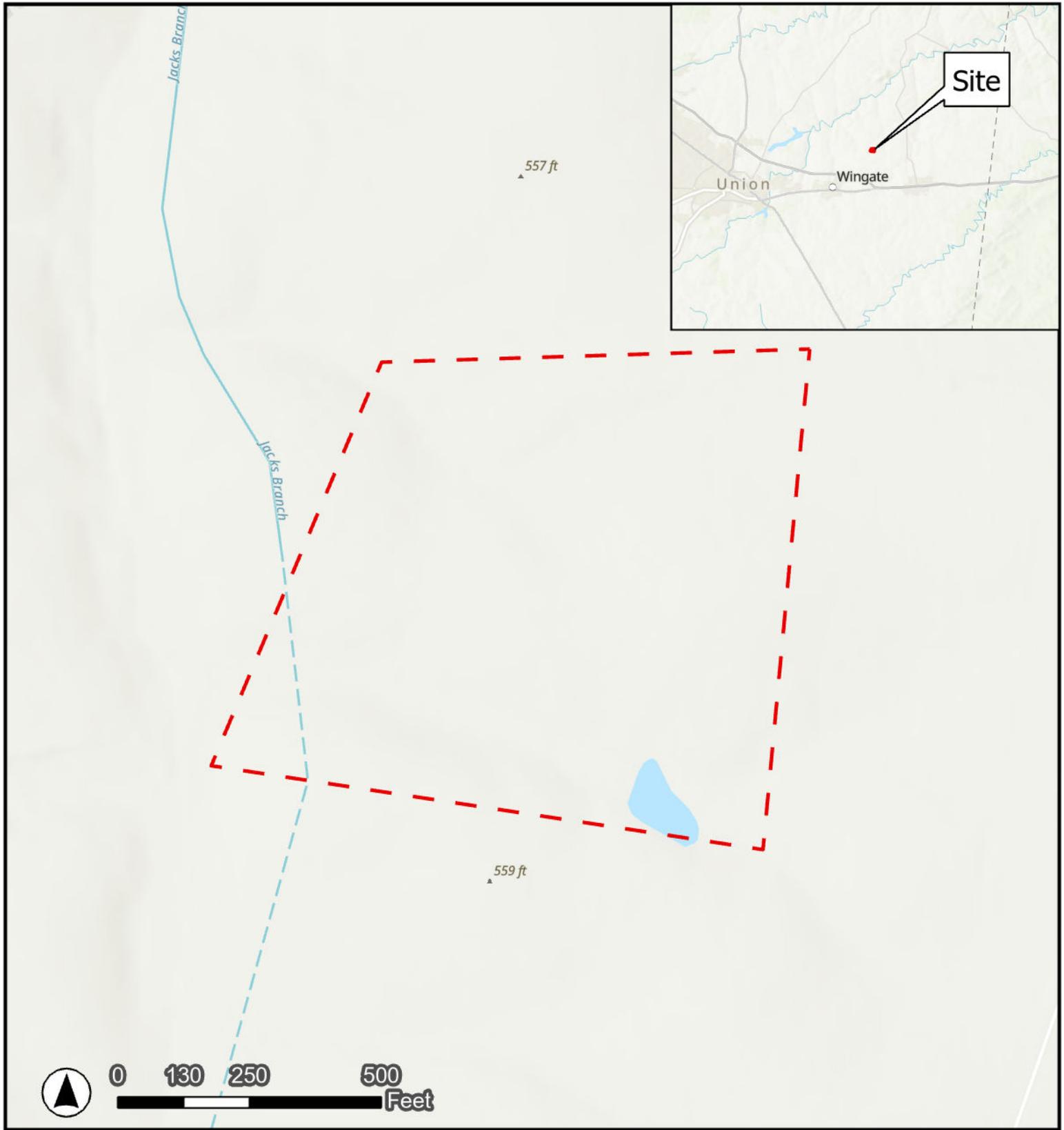


Figure 1. Site Location Map

Natural Resource Assessment and Aquatic Resources Delineation

Legend

 Project Study Area



This map is for graphical purposes only and does not represent a legal survey. It is strictly for use with Pike Engineering (Pike Job No. 24-35601-000). Pike assumes no liability, direct or indirect, whatsoever for any such third party or unintended use.

Project Name:
Wingate Substation

Drawn by: W. Johnson

Reviewed By: M. Bollero

Date: 2/13/2025



123 N White Street
Fort Mill, SC 29715

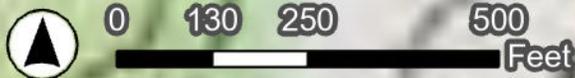
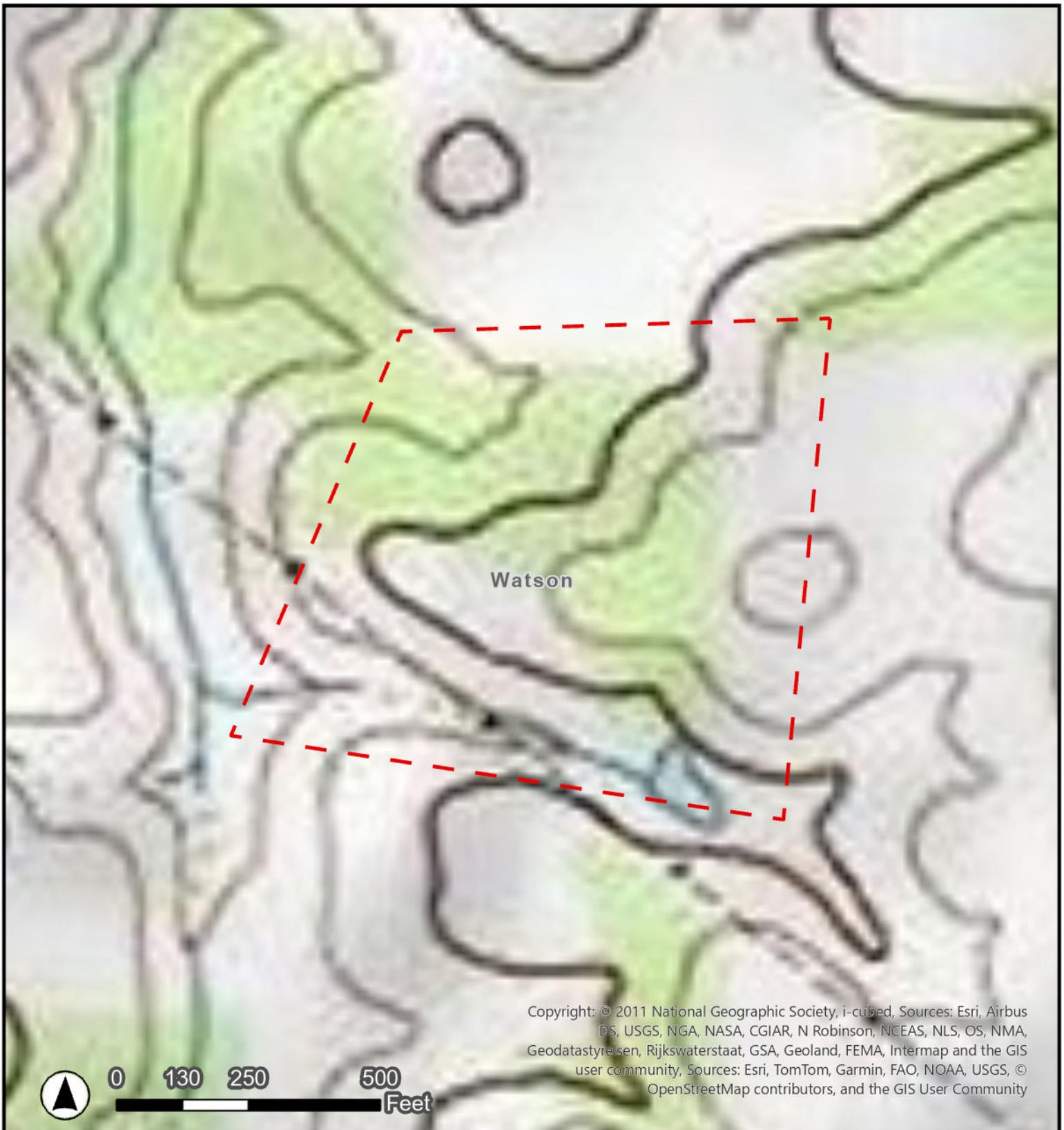


Figure 2. USGS Topographic Quadrangle
 Natural Resource Assessment and Aquatic Resources Delineation

Legend
 Project Study Area



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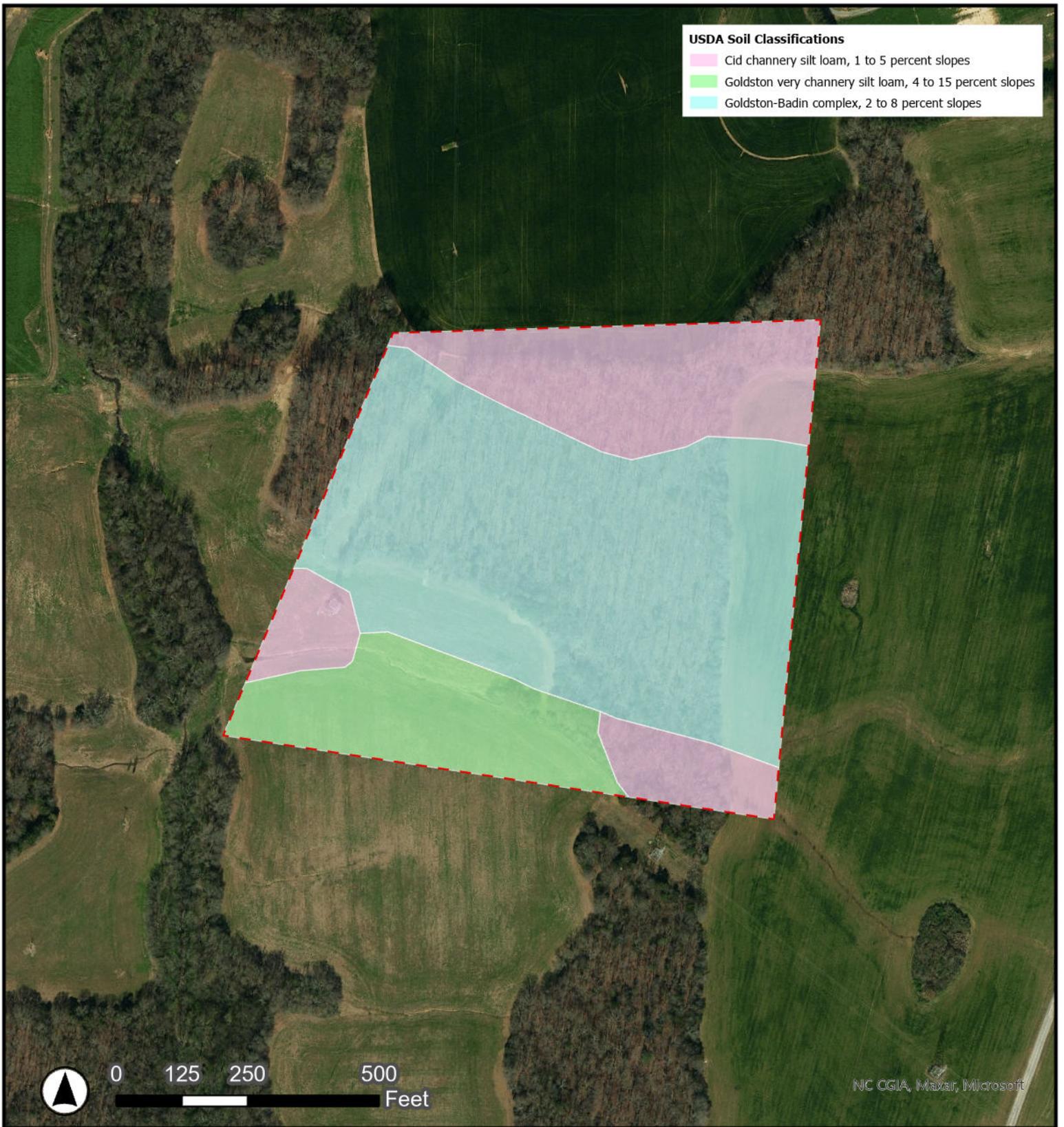
Project Name:
 Wingate Substation

Drawn by: W. Johnson

Reviewed By: M. Bollero

Date: 2/13/2025





USDA Soil Classifications

- Cid channery silt loam, 1 to 5 percent slopes
- Goldston very channery silt loam, 4 to 15 percent slopes
- Goldston-Badin complex, 2 to 8 percent slopes

0 125 250 500
Feet

NC CGIA, Maxar, Microsoft

Figure 3. NRCS Web Soil Survey

Natural Resource Assessment and Aquatic Resources Delineation

Legend

Project Study Area



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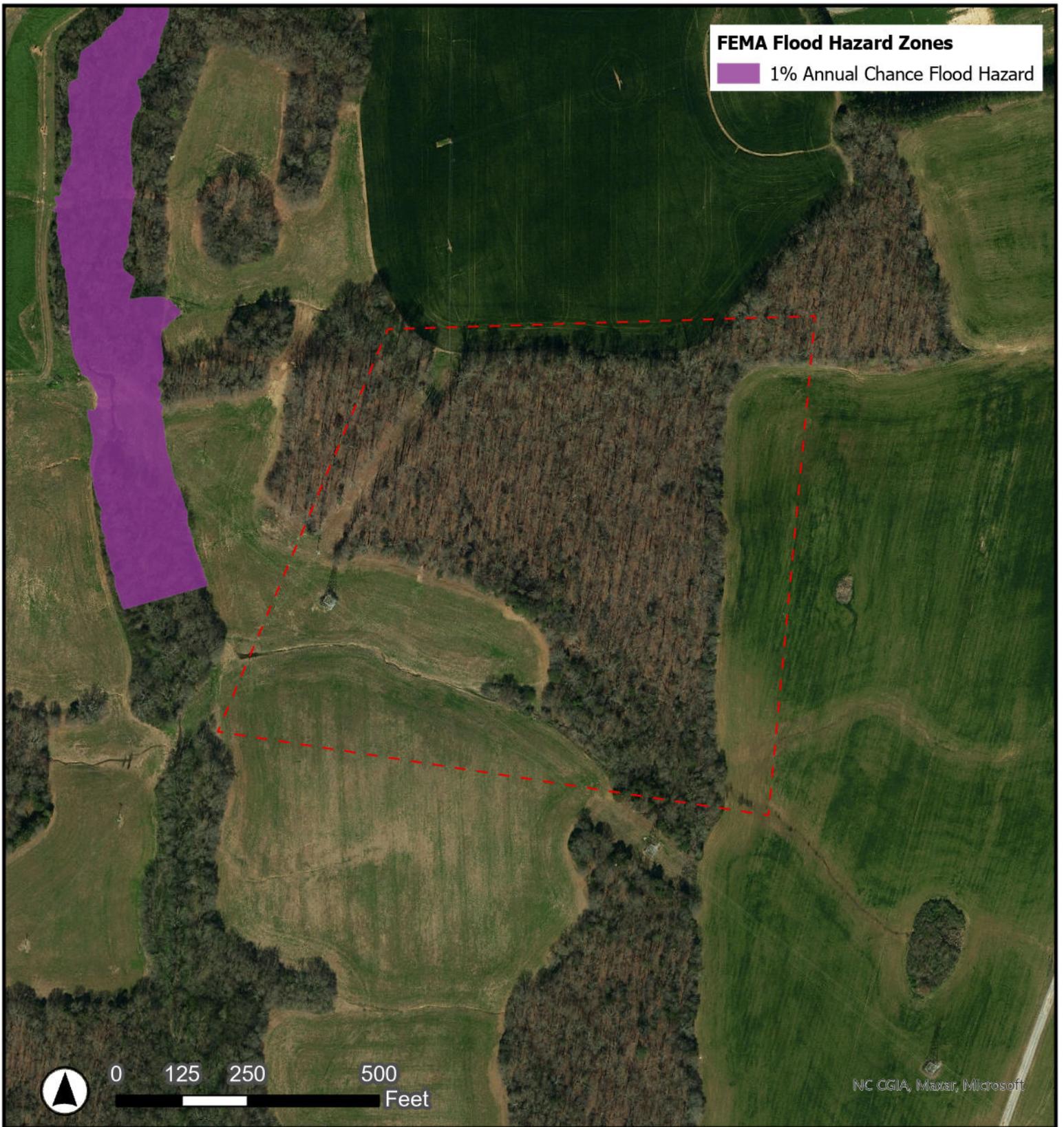
Project Name:
Wingate Substation

Drawn by: W. Johnson

Reviewed By: M. Bollero

Date: 2/13/2025





FEMA Flood Hazard Zones
 1% Annual Chance Flood Hazard

0 125 250 500
 Feet

NC CGIA, Maxar, Microsoft

Figure 4. FEMA Floodplain Panel

Natural Resource Assessment and Aquatic Resources Delineation

Legend

Project Study Area



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Project Name:
 Wingate Substation

Drawn by: W. Johnson

Reviewed By: M. Bollero

Date: 2/13/2025





Figure 5. Delineation of Wetlands and Waters

Natural Resource Assessment and Aquatic Resources Delineation

Legend

- Project Study Area
- Intermittent Stream



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Project Name:
Wingate Substation

Drawn by: W. Johnson

Reviewed By: M. Bollero

Date: 2/13/2025



Appendix B
Photographs



NC CGIA, Maxar, Microsoft

Photo Log

Natural Resource Assessment and Aquatic Resources Delineation

Legend

-  Project Study Area
-  Photo Reference Points



This map is for graphical purposes only and does not represent a legal survey. It is strictly for use with Pike Engineering (Pike Job No. 24-35601-000). Pike assumes no liability, direct or indirect, whatsoever for any such third party or unintended use.

Project Name:	Wingate Substation
Drawn by:	W. Johnson
Reviewed By:	M. Bollero
Date:	2/13/2025



Wingate Substation Photo Log

Stream Photos



Photo 1 - View of Stream 1, looking upstream of flag 4.

Existing Conditions



Photo 2 – View of existing conditions at the location of the proposed substation, facing southeast.



Photo 3 – View of existing conditions in the southern portion of the site, facing southeast.



Photo 4 – View of existing conditions in the western portion of the site, facing northeast.



Photo 5 – View of existing conditions in the northern portion of the site, facing northeast.

Appendix C

U.S. Fish & Wildlife Service (USFWS) IPaC Species List

IPaC resource list

This report is an automatically generated list of species and other resources such as critical habitat (collectively referred to as *trust resources*) under the U.S. Fish and Wildlife Service's (USFWS) jurisdiction that are known or expected to be on or near the project area referenced below. The list may also include trust resources that occur outside of the project area, but that could potentially be directly or indirectly affected by activities in the project area. However, determining the likelihood and extent of effects a project may have on trust resources typically requires gathering additional site-specific (e.g., vegetation/species surveys) and project-specific (e.g., magnitude and timing of proposed activities) information.

Below is a summary of the project information you provided and contact information for the USFWS office(s) with jurisdiction in the defined project area. Please read the introduction to each section that follows (Endangered Species, Migratory Birds, USFWS Facilities, and NWI Wetlands) for additional information applicable to the trust resources addressed in that section.

Location

Union County, North Carolina



Local office

Asheville Ecological Services Field Office

☎ (828) 258-3939

📠 (828) 258-5330

160 Zillicoa Street, Suite B
Asheville, NC 28801-1082

NOT FOR CONSULTATION

Endangered species

This resource list is for informational purposes only and does not constitute an analysis of project level impacts.

The primary information used to generate this list is the known or expected range of each species. Additional areas of influence (AOI) for species are also considered. An AOI includes areas outside of the species range if the species could be indirectly affected by activities in that area (e.g., placing a dam upstream of a fish population even if that fish does not occur at the dam site, may indirectly impact the species by reducing or eliminating water flow downstream). Because species can move, and site conditions can change, the species on this list are not guaranteed to be found on or near the project area. To fully determine any potential effects to species, additional site-specific and project-specific information is often required.

Section 7 of the Endangered Species Act **requires** Federal agencies to "request of the Secretary information whether any species which is listed or proposed to be listed may be present in the area of such proposed action" for any project that is conducted, permitted, funded, or licensed by any Federal agency. A letter from the local office and a species list which fulfills this requirement can **only** be obtained by requesting an official species list from either the Regulatory Review section in IPaC (see directions below) or from the local field office directly.

For project evaluations that require USFWS concurrence/review, please return to the IPaC website and request an official species list by doing the following:

1. Draw the project location and click CONTINUE.
2. Click DEFINE PROJECT.
3. Log in (if directed to do so).
4. Provide a name and description for your project.
5. Click REQUEST SPECIES LIST.

Listed species¹ and their critical habitats are managed by the [Ecological Services Program](#) of the U.S. Fish and Wildlife Service (USFWS) and the fisheries division of the National Oceanic and Atmospheric Administration (NOAA Fisheries²).

Species and critical habitats under the sole responsibility of NOAA Fisheries are **not** shown on this list. Please contact [NOAA Fisheries](#) for [species under their jurisdiction](#).

-
1. Species listed under the [Endangered Species Act](#) are threatened or endangered; IPaC also shows species that are candidates, or proposed, for listing. See the [listing status page](#) for more information. IPaC only shows species that are regulated by USFWS (see FAQ).

2. [NOAA Fisheries](#), also known as the National Marine Fisheries Service (NMFS), is an office of the National Oceanic and Atmospheric Administration within the Department of Commerce.

The following species are potentially affected by activities in this location:

Clams

NAME	STATUS
Carolina Heelsplitter <i>Lasmigona decorata</i> Wherever found There is final critical habitat for this species. Your location does not overlap the critical habitat. https://ecos.fws.gov/ecp/species/3534	Endangered

Insects

NAME	STATUS
Monarch Butterfly <i>Danaus plexippus</i> Wherever found There is proposed critical habitat for this species. Your location does not overlap the critical habitat. https://ecos.fws.gov/ecp/species/9743	Proposed Threatened

Flowering Plants

NAME	STATUS
Michaux's Sumac <i>Rhus michauxii</i> Wherever found No critical habitat has been designated for this species. https://ecos.fws.gov/ecp/species/5217	Endangered
Schweinitz's Sunflower <i>Helianthus schweinitzii</i> Wherever found No critical habitat has been designated for this species. https://ecos.fws.gov/ecp/species/3849	Endangered

Critical habitats

Potential effects to critical habitat(s) in this location must be analyzed along with the endangered species themselves.

There are no critical habitats at this location.

You are still required to determine if your project(s) may have effects on all above listed species.

Bald & Golden Eagles

Bald and Golden Eagles are protected under the Bald and Golden Eagle Protection Act ² and the Migratory Bird Treaty Act (MBTA) ¹. Any person or organization who plans or conducts activities that may result in impacts to Bald or Golden Eagles, or their habitats, should follow appropriate regulations and consider implementing appropriate avoidance and minimization measures, as described in the various links on this page.

Additional information can be found using the following links:

- Eagle Management <https://www.fws.gov/program/eagle-management>
- Measures for avoiding and minimizing impacts to birds <https://www.fws.gov/library/collections/avoiding-and-minimizing-incident-take-migratory-birds>
- Nationwide avoidance and minimization measures for birds <https://www.fws.gov/sites/default/files/documents/nationwide-standard-conservation-measures.pdf>
- Supplemental Information for Migratory Birds and Eagles in IPaC <https://www.fws.gov/media/supplemental-information-migratory-birds-and-bald-and-golden-eagles-may-occur-project-action>

There are Bald Eagles and/or Golden Eagles in your [project](#) area.

Measures for Proactively Minimizing Eagle Impacts

For information on how to best avoid and minimize disturbance to nesting bald eagles, please review the [National Bald Eagle Management Guidelines](#). You may employ the timing and activity-specific distance recommendations in this document when designing your project/activity to avoid and minimize eagle impacts. For bald eagle information specific to Alaska, please refer to [Bald Eagle Nesting and Sensitivity to Human Activity](#).

The FWS does not currently have guidelines for avoiding and minimizing disturbance to nesting Golden Eagles. For site-specific recommendations regarding nesting Golden Eagles, please consult with the appropriate Regional [Migratory Bird Office](#) or [Ecological Services Field Office](#).

If disturbance or take of eagles cannot be avoided, an [incidental take permit](#) may be available to authorize any take that results from, but is not the purpose of, an otherwise lawful activity. For assistance making this determination for Bald Eagles, visit the [Do I Need A Permit Tool](#).

For assistance making this determination for golden eagles, please consult with the appropriate Regional [Migratory Bird Office](#) or [Ecological Services Field Office](#).

Ensure Your Eagle List is Accurate and Complete

If your project area is in a poorly surveyed area in IPaC, your list may not be complete and you may need to rely on other resources to determine what species may be present (e.g. your local FWS field office, state surveys, your own surveys). Please review the [Supplemental Information on Migratory Birds and Eagles](#), to help you properly interpret the report for your specified location, including determining if there is sufficient data to ensure your list is accurate.

For guidance on when to schedule activities or implement avoidance and minimization measures to reduce impacts to bald or golden eagles on your list, see the "Probability of Presence Summary" below to see when these bald or golden eagles are most likely to be present and breeding in your project area.

Review the FAQs

The FAQs below provide important additional information and resources.

NAME

BREEDING SEASON

Bald Eagle *Haliaeetus leucocephalus*

Breeds Sep 1 to Jul 31

This is not a Bird of Conservation Concern (BCC) in this area, but warrants attention because of the Eagle Act or for potential susceptibilities in offshore areas from certain types of development or activities.

<https://ecos.fws.gov/ecp/species/1626>

Probability of Presence Summary

The graphs below provide our best understanding of when birds of concern are most likely to be present in your project area. This information can be used to tailor and schedule your project activities to avoid or minimize impacts to birds. Please make sure you read ["Supplemental Information on Migratory Birds and Eagles"](#), specifically the FAQ section titled "Proper Interpretation and Use of Your Migratory Bird Report" before using or attempting to interpret this report.

Probability of Presence (■)

Each green bar represents the bird's relative probability of presence in the 10km grid cell(s) your project overlaps during a particular week of the year. (A year is represented as 12 4-week months.) A taller bar indicates a higher probability of species presence. The survey effort (see below) can be used to establish a level of confidence in the presence score. One can have higher confidence in the presence score if the corresponding survey effort is also high.

How is the probability of presence score calculated? The calculation is done in three steps:

1. The probability of presence for each week is calculated as the number of survey events in the week where the species was detected divided by the total number of survey events for that week. For example, if in week 12 there were 20 survey events and the Spotted Towhee was found in 5 of them, the probability of presence of the Spotted Towhee in week 12 is 0.25.
2. To properly present the pattern of presence across the year, the relative probability of presence is calculated. This is the probability of presence divided by the maximum probability of presence across all weeks. For example, imagine the probability of presence in week 20 for the Spotted Towhee is 0.05, and that the probability of presence at week 12 (0.25) is the maximum of any week of the year. The relative probability of presence on week 12 is $0.25/0.25 = 1$; at week 20 it is $0.05/0.25 = 0.2$.
3. The relative probability of presence calculated in the previous step undergoes a statistical conversion so that all possible values fall between 0 and 10, inclusive. This is the probability of presence score.

To see a bar's probability of presence score, simply hover your mouse cursor over the bar.

Breeding Season (■)

Yellow bars denote a very liberal estimate of the time-frame inside which the bird breeds across its entire range. If there are no yellow bars shown for a bird, it does not breed in your project area.

Survey Effort (|)

Vertical black lines superimposed on probability of presence bars indicate the number of surveys performed for that species in the 10km grid cell(s) your project area overlaps. The number of surveys is expressed as a range, for example, 33 to 64 surveys.

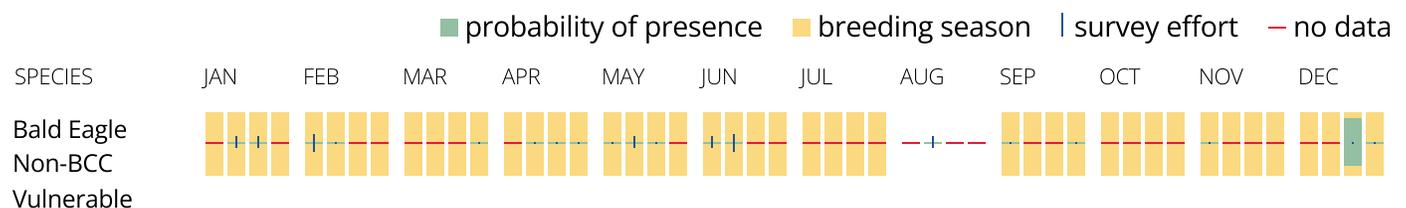
To see a bar's survey effort range, simply hover your mouse cursor over the bar.

No Data (-)

A week is marked as having no data if there were no survey events for that week.

Survey Timeframe

Surveys from only the last 10 years are used in order to ensure delivery of currently relevant information. The exception to this is areas off the Atlantic coast, where bird returns are based on all years of available data, since data in these areas is currently much more sparse.



Bald & Golden Eagles FAQs

What does IPaC use to generate the potential presence of bald and golden eagles in my specified location?

The potential for eagle presence is derived from data provided by the [Avian Knowledge Network \(AKN\)](#). The AKN data is based on a growing collection of [survey, banding, and citizen science datasets](#) and is queried and filtered to return a list of those birds reported as occurring in the 10km grid cell(s) which your project intersects, and that have been identified as warranting special attention because they are an eagle ([Bald and Golden Eagle Protection Act](#) requirements may apply).

Proper interpretation and use of your eagle report

On the graphs provided, please look carefully at the survey effort (indicated by the black vertical line) and for the existence of the "no data" indicator (a red horizontal line). A high survey effort is the key component. If the survey effort is high, then the probability of presence score can be viewed as more dependable. In contrast, a low survey effort line or no data line (red horizontal) means a lack of data and, therefore, a lack of certainty about presence of the species. This list is not perfect; it is simply a starting point for identifying what birds have the potential to be in your project area, when they might be there, and if they might be breeding (which means nests might be present). The list and associated information help you know what to look for to confirm presence and helps guide you in knowing when to implement avoidance and minimization measures to eliminate or reduce potential impacts from your project activities or get the appropriate permits should presence be confirmed.

How do I know if eagles are breeding, wintering, or migrating in my area?

To see what part of a particular bird's range your project area falls within (i.e. breeding, wintering, migrating, or resident), you may query your location using the [RAIL Tool](#) and view the range maps provided for birds in your area at the bottom of the profiles provided for each bird in your results. If an eagle on your IPaC migratory bird species list has a breeding season associated with it (indicated by yellow vertical bars on the phenology graph in your "IPaC PROBABILITY OF PRESENCE SUMMARY" at the top of your results list), there may be nests present at some point within the timeframe specified. If "Breeds elsewhere" is indicated, then the bird likely does not breed in your project area.

Interpreting the Probability of Presence Graphs

Each green bar represents the bird's relative probability of presence in the 10km grid cell(s) your project overlaps during a particular week of the year. A taller bar indicates a higher probability of species presence. The survey effort can be used to establish a level of confidence in the presence score.

How is the probability of presence score calculated? The calculation is done in three steps:

The probability of presence for each week is calculated as the number of survey events in the week where the species was detected divided by the total number of survey events for that week. For example, if in week 12 there were 20 survey events and the Spotted Towhee was found in 5 of them, the probability of presence of the Spotted Towhee in week 12 is 0.25.

To properly present the pattern of presence across the year, the relative probability of presence is calculated. This is the probability of presence divided by the maximum probability of presence across all weeks. For example, imagine the probability of presence in week 20 for the Spotted Towhee is 0.05, and that the probability of presence at week 12 (0.25) is the maximum of any week of the year. The relative probability of presence on week 12 is $0.25/0.25 = 1$; at week 20 it is $0.05/0.25 = 0.2$.

The relative probability of presence calculated in the previous step undergoes a statistical conversion so that all possible values fall between 0 and 10, inclusive. This is the probability of presence score.

Breeding Season ()

Yellow bars denote a very liberal estimate of the time-frame inside which the bird breeds across its entire range. If there are no yellow bars shown for a bird, it does not breed in your project area.

Survey Effort ()

Vertical black lines superimposed on probability of presence bars indicate the number of surveys performed for that species in the 10km grid cell(s) your project area overlaps.

No Data ()

A week is marked as having no data if there were no survey events for that week.

Survey Timeframe

Surveys from only the last 10 years are used in order to ensure delivery of currently relevant information. The exception to this is areas off the Atlantic coast, where bird returns are based on all years of available data, since data in these areas is currently much more sparse.

Migratory birds

The Migratory Bird Treaty Act (MBTA)¹ prohibits the take (including killing, capturing, selling, trading, and transport) of protected migratory bird species without prior authorization by the Department of Interior U.S. Fish and Wildlife Service (Service). The incidental take of migratory birds is the injury or death of birds that results from, but is not the purpose, of an activity. The Service interprets the MBTA to prohibit incidental take.

1. The [Migratory Birds Treaty Act](#) of 1918.
2. The [Bald and Golden Eagle Protection Act](#) of 1940.

Additional information can be found using the following links:

- Eagle Management <https://www.fws.gov/program/eagle-management>
- Measures for avoiding and minimizing impacts to birds
<https://www.fws.gov/library/collections/avoiding-and-minimizing-incidental-take-migratory-birds>
- Nationwide avoidance and minimization measures for birds
- Supplemental Information for Migratory Birds and Eagles in IPaC
<https://www.fws.gov/media/supplemental-information-migratory-birds-and-bald-and-golden-eagles-may-occur-project-action>

Measures for Proactively Minimizing Migratory Bird Impacts

Your IPaC Migratory Bird list showcases [birds of concern](#), including [Birds of Conservation Concern \(BCC\)](#), in your project location. This is not a comprehensive list of all birds found in your project area. However, you can help proactively minimize significant impacts to all birds at your project location by implementing the measures in the [Nationwide avoidance and](#)

[minimization measures for birds](#) document, and any other project-specific avoidance and minimization measures suggested at the link [Measures for avoiding and minimizing impacts to birds](#) for the birds of concern on your list below.

Ensure Your Migratory Bird List is Accurate and Complete

If your project area is in a poorly surveyed area, your list may not be complete and you may need to rely on other resources to determine what species may be present (e.g. your local FWS field office, state surveys, your own surveys). Please review the [Supplemental Information on Migratory Birds and Eagles document](#), to help you properly interpret the report for your specified location, including determining if there is sufficient data to ensure your list is accurate.

For guidance on when to schedule activities or implement avoidance and minimization measures to reduce impacts to migratory birds on your list, see the "Probability of Presence Summary" below to see when these birds are most likely to be present and breeding in your project area.

Review the FAQs

The FAQs below provide important additional information and resources.

NAME	BREEDING SEASON
Bald Eagle <i>Haliaeetus leucocephalus</i> This is not a Bird of Conservation Concern (BCC) in this area, but warrants attention because of the Eagle Act or for potential susceptibilities in offshore areas from certain types of development or activities. https://ecos.fws.gov/ecp/species/1626	Breeds Sep 1 to Jul 31
Chimney Swift <i>Chaetura pelagica</i> This is a Bird of Conservation Concern (BCC) throughout its range in the continental USA and Alaska.	Breeds Mar 15 to Aug 25
Eastern Whip-poor-will <i>Antrostomus vociferus</i> This is a Bird of Conservation Concern (BCC) throughout its range in the continental USA and Alaska.	Breeds May 1 to Aug 20
Rusty Blackbird <i>Euphagus carolinus</i> This is a Bird of Conservation Concern (BCC) only in particular Bird Conservation Regions (BCRs) in the continental USA	Breeds elsewhere

Probability of Presence Summary

The graphs below provide our best understanding of when birds of concern are most likely to be present in your project area. This information can be used to tailor and schedule your project activities to avoid or minimize impacts to birds. Please make sure you read ["Supplemental Information on Migratory Birds and Eagles"](#), specifically the FAQ section titled "Proper Interpretation and Use of Your Migratory Bird Report" before using or attempting to interpret this report.

Probability of Presence (■)

Each green bar represents the bird's relative probability of presence in the 10km grid cell(s) your project overlaps during a particular week of the year. (A year is represented as 12 4-week months.) A taller bar indicates a higher probability of species presence. The survey effort (see below) can be used to establish a level of confidence in the presence score. One can have higher confidence in the presence score if the corresponding survey effort is also high.

How is the probability of presence score calculated? The calculation is done in three steps:

1. The probability of presence for each week is calculated as the number of survey events in the week where the species was detected divided by the total number of survey events for that week. For example, if in week 12 there were 20 survey events and the Spotted Towhee was found in 5 of them, the probability of presence of the Spotted Towhee in week 12 is 0.25.
2. To properly present the pattern of presence across the year, the relative probability of presence is calculated. This is the probability of presence divided by the maximum probability of presence across all weeks. For example, imagine the probability of presence in week 20 for the Spotted Towhee is 0.05, and that the probability of presence at week 12 (0.25) is the maximum of any week of the year. The relative probability of presence on week 12 is $0.25/0.25 = 1$; at week 20 it is $0.05/0.25 = 0.2$.
3. The relative probability of presence calculated in the previous step undergoes a statistical conversion so that all possible values fall between 0 and 10, inclusive. This is the probability of presence score.

To see a bar's probability of presence score, simply hover your mouse cursor over the bar.

Breeding Season (■)

Yellow bars denote a very liberal estimate of the time-frame inside which the bird breeds across its entire range. If there are no yellow bars shown for a bird, it does not breed in your project area.

Survey Effort (|)

Vertical black lines superimposed on probability of presence bars indicate the number of surveys performed for that species in the 10km grid cell(s) your project area overlaps. The number of surveys is expressed as a range, for example, 33 to 64 surveys.

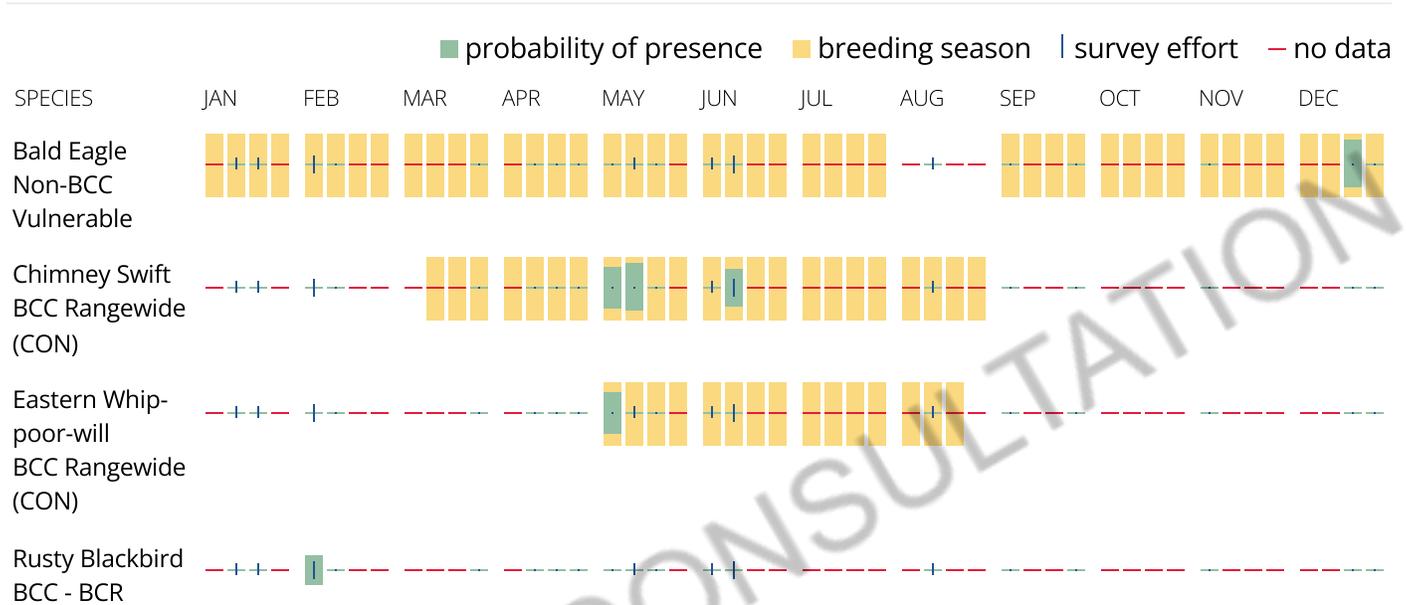
To see a bar's survey effort range, simply hover your mouse cursor over the bar.

No Data (-)

A week is marked as having no data if there were no survey events for that week.

Survey Timeframe

Surveys from only the last 10 years are used in order to ensure delivery of currently relevant information. The exception to this is areas off the Atlantic coast, where bird returns are based on all years of available data, since data in these areas is currently much more sparse.



Migratory Bird FAQs

Tell me more about avoidance and minimization measures I can implement to avoid or minimize impacts to migratory birds.

[Nationwide Avoidance & Minimization Measures for Birds](#) describes measures that can help avoid and minimize impacts to all birds at any location year-round. When birds may be breeding in the area, identifying the locations of any active nests and avoiding their destruction is one of the most effective ways to minimize impacts. To see when birds are most likely to occur and breed in your project area, view the Probability of Presence Summary. [Additional measures](#) or [permits](#) may be advisable depending on the type of activity you are conducting and the type of infrastructure or bird species present on your project site.

What does IPaC use to generate the list of migratory birds that potentially occur in my specified location?

The Migratory Bird Resource List is comprised of [Birds of Conservation Concern \(BCC\)](#) and other species that may warrant special attention in your project location, such as those listed under the Endangered Species Act or the [Bald and Golden Eagle Protection Act](#) and those species marked as "Vulnerable". See the FAQ "What are the levels of concern for migratory birds?" for more information on the levels of concern covered in the IPaC migratory bird species list.

The migratory bird list generated for your project is derived from data provided by the [Avian Knowledge Network \(AKN\)](#). The AKN data is based on a growing collection of [survey, banding, and citizen science datasets](#) and is queried and filtered to return a list of those birds reported as occurring in the 10km grid cell(s) with which your project intersects. These species have been identified as warranting special attention because they are BCC species in that area, an eagle ([Bald and Golden Eagle Protection Act](#) requirements may apply), or a species that has a particular vulnerability to offshore activities or development.

Again, the Migratory Bird Resource list includes only a subset of birds that may occur in your project area. It is not representative of all birds that may occur in your project area. To get a list of all birds potentially present in your project area, and to verify survey effort when no results present, please visit the [Rapid Avian Information Locator \(RAIL\) Tool](#).

Why are subspecies showing up on my list?

Subspecies profiles are included on the list of species present in your project area because observations in the AKN for **the species** are being detected. If the species are present, that means that the subspecies may also be present. If a subspecies shows up on your list, you may need to rely on other resources to determine if that subspecies may be present (e.g. your local FWS field office, state surveys, your own surveys).

What does IPaC use to generate the probability of presence graphs for the migratory birds potentially occurring in my specified location?

The probability of presence graphs associated with your migratory bird list are based on data provided by the [Avian Knowledge Network \(AKN\)](#). This data is derived from a growing collection of [survey, banding, and citizen science datasets](#).

Probability of presence data is continuously being updated as new and better information becomes available. To learn more about how the probability of presence graphs are produced and how to interpret them, go to the Probability of Presence Summary and then click on the "Tell me about these graphs" link.

How do I know if a bird is breeding, wintering, or migrating in my area?

To see what part of a particular bird's range your project area falls within (i.e. breeding, wintering, migrating, or resident), you may query your location using the [RAIL Tool](#) and view the range maps provided for birds in your area at the bottom of the profiles provided for each bird in your results. If a bird on your IPaC migratory bird species list has a breeding season associated with it (indicated by yellow vertical bars on the phenology graph in your "IPaC PROBABILITY OF PRESENCE SUMMARY" at the top of your results list), there may be nests present at some point within the timeframe specified. If "Breeds elsewhere" is indicated, then the bird likely does not breed in your project area.

What are the levels of concern for migratory birds?

Migratory birds delivered through IPaC fall into the following distinct categories of concern:

1. "BCC Rangewide" birds are [Birds of Conservation Concern](#) (BCC) that are of concern throughout their range anywhere within the USA (including Hawaii, the Pacific Islands, Puerto Rico, and the Virgin Islands);
2. "BCC - BCR" birds are BCCs that are of concern only in particular Bird Conservation Regions (BCRs) in the continental USA; and

3. "Non-BCC - Vulnerable" birds are not BCC species in your project area, but appear on your list either because of the [Bald and Golden Eagle Protection Act](#) requirements (for eagles) or (for non-eagles) potential susceptibilities in offshore areas from certain types of development or activities (e.g. offshore energy development or longline fishing).

Although it is important to avoid and minimize impacts to all birds, efforts should be made, in particular, to avoid and minimize impacts to the birds on this list, especially BCC species. For more information on avoidance and minimization measures you can implement to help avoid and minimize migratory bird impacts, please see the FAQ "Tell me more about avoidance and minimization measures I can implement to avoid or minimize impacts to migratory birds".

Details about birds that are potentially affected by offshore projects

For additional details about the relative occurrence and abundance of both individual bird species and groups of bird species within your project area off the Atlantic Coast, please visit the [Northeast Ocean Data Portal](#). The Portal also offers data and information about other taxa besides birds that may be helpful to you in your project review. Alternately, you may download the bird model results files underlying the portal maps through the [NOAA NCCOS Integrative Statistical Modeling and Predictive Mapping of Marine Bird Distributions and Abundance on the Atlantic Outer Continental Shelf](#) project webpage.

Proper interpretation and use of your migratory bird report

The migratory bird list generated is not a list of all birds in your project area, only a subset of birds of priority concern. To learn more about how your list is generated and see options for identifying what other birds may be in your project area, please see the FAQ "What does IPaC use to generate the migratory birds potentially occurring in my specified location". Please be aware this report provides the "probability of presence" of birds within the 10 km grid cell(s) that overlap your project; not your exact project footprint. On the graphs provided, please look carefully at the survey effort (indicated by the black vertical line) and for the existence of the "no data" indicator (a red horizontal line). A high survey effort is the key component. If the survey effort is high, then the probability of presence score can be viewed as more dependable. In contrast, a low survey effort bar or no data bar means a lack of data and, therefore, a lack of certainty about presence of the species. This list does not represent all birds present in your project area. It is simply a starting point for identifying what birds of concern have the potential to be in your project area, when they might be there, and if they might be breeding (which means nests might be present). The list and associated information help you know what to look for to confirm presence and helps guide implementation of avoidance and minimization measures to eliminate or reduce potential impacts from your project activities, should presence be confirmed. To learn more about avoidance and minimization measures, visit the FAQ "Tell me about avoidance and minimization measures I can implement to avoid or minimize impacts to migratory birds".

Interpreting the Probability of Presence Graphs

Each green bar represents the bird's relative probability of presence in the 10km grid cell(s) your project overlaps during a particular week of the year. A taller bar indicates a higher probability of species presence. The survey effort can be used to establish a level of confidence in the presence score.

How is the probability of presence score calculated? The calculation is done in three steps:

The probability of presence for each week is calculated as the number of survey events in the week where the species was detected divided by the total number of survey events for that week. For example, if in week 12 there were 20 survey events and the Spotted Towhee was found in 5 of them, the probability of presence of the Spotted Towhee in week 12 is 0.25.

To properly present the pattern of presence across the year, the relative probability of presence is calculated. This is the probability of presence divided by the maximum probability of presence across all weeks. For example, imagine the probability of presence in week 20 for the Spotted Towhee is 0.05, and that the probability of presence at week 12 (0.25) is the maximum of any week of the year. The relative probability of presence on week 12 is $0.25/0.25 = 1$; at week 20 it is $0.05/0.25 = 0.2$.

The relative probability of presence calculated in the previous step undergoes a statistical conversion so that all possible values fall between 0 and 10, inclusive. This is the probability of presence score.

Breeding Season ()

Yellow bars denote a very liberal estimate of the time-frame inside which the bird breeds across its entire range. If there are no yellow bars shown for a bird, it does not breed in your project area.

Survey Effort ()

Vertical black lines superimposed on probability of presence bars indicate the number of surveys performed for that species in the 10km grid cell(s) your project area overlaps.

No Data ()

A week is marked as having no data if there were no survey events for that week.

Survey Timeframe

Surveys from only the last 10 years are used in order to ensure delivery of currently relevant information. The exception to this is areas off the Atlantic coast, where bird returns are based on all years of available data, since data in these areas is currently much more sparse.

Facilities

Wildlife refuges and fish hatcheries

Refuge and fish hatchery information is not available at this time

Wetlands in the National Wetlands Inventory (NWI)

Impacts to [NWI wetlands](#) and other aquatic habitats may be subject to regulation under Section 404 of the Clean Water Act, or other State/Federal statutes.

For more information please contact the Regulatory Program of the local [U.S. Army Corps of Engineers District](#).

Please note that the NWI data being shown may be out of date. We are currently working to update our NWI data set. We recommend you verify these results with a site visit to determine the actual extent of wetlands on site.

This location overlaps the following wetlands:

RIVERINE

[R4SBC](#)

[R5UBH](#)

A full description for each wetland code can be found at the [National Wetlands Inventory website](#)

NOTE: This initial screening does **not** replace an on-site delineation to determine whether wetlands occur. Additional information on the NWI data is provided below.

Data limitations

The Service's objective of mapping wetlands and deepwater habitats is to produce reconnaissance level information on the location, type and size of these resources. The maps are prepared from the analysis of high altitude imagery. Wetlands are identified based on vegetation, visible hydrology and geography. A margin of error is inherent in the use of imagery; thus, detailed on-the-ground inspection of any particular site may result in revision of the wetland boundaries or classification established through image analysis.

The accuracy of image interpretation depends on the quality of the imagery, the experience of the image analysts, the amount and quality of the collateral data and the amount of ground truth verification work conducted. Metadata should be consulted to determine the date of the source imagery used and any mapping problems.

Wetlands or other mapped features may have changed since the date of the imagery or field work. There may be occasional differences in polygon boundaries or classifications between the information depicted on the map and the actual conditions on site.

Data exclusions

Certain wetland habitats are excluded from the National mapping program because of the limitations of aerial imagery as the primary data source used to detect wetlands. These habitats include seagrasses or submerged aquatic vegetation that are found in the intertidal and subtidal zones of estuaries and nearshore coastal waters. Some deepwater reef communities (coral or tubercid worm reefs) have also been excluded from the inventory. These habitats, because of their depth, go undetected by aerial imagery.

Data precautions

Federal, state, and local regulatory agencies with jurisdiction over wetlands may define and describe wetlands in a different manner than that used in this inventory. There is no attempt, in either the design or products of this inventory, to define the limits of proprietary jurisdiction of any Federal, state, or local government or to establish the geographical scope of the regulatory programs of government agencies. Persons intending to engage in activities involving modifications within or adjacent to wetland areas should seek the advice of appropriate Federal, state, or local agencies concerning specified agency regulatory programs and proprietary jurisdictions that may affect such activities.

Owner/Applicant

Owner: Union County
500 North Main Street, Suite 70
Monroe, NC 28112

Applicant: Union Electric Membership Corporation (Union Power)
1525 North Rocky River Road
Monroe, NC 28110

Property Information

Location: On the east side of Mills Harris Road north of Monroe Ansonville Road. Location more specifically described as tax parcel 02-202-008.



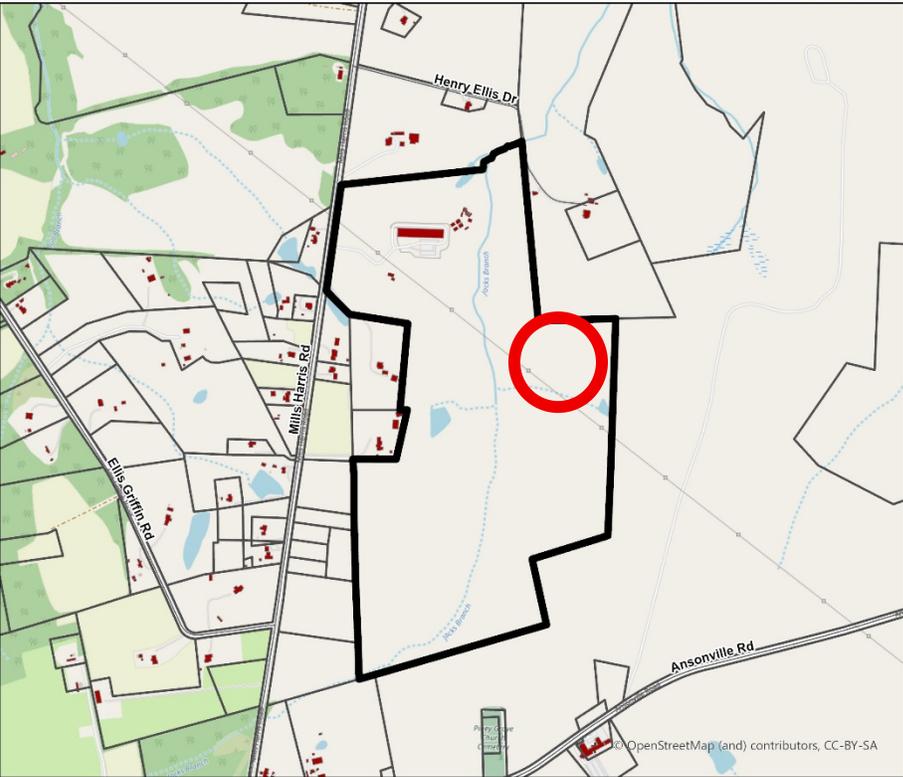
Municipal Proximity: The site is slightly more than one mile from the Town of Wingate.

Existing Land Use and Development Status: The parcel is currently zoned RA-200 with Conditions. The property is used by the Union County Sheriff's Department as a training facility. The site has not yet been fully developed based on the approved rezoning site plan.

Development Status

Petition: 2025-CZ-008
Name: Union Power

Size: 161.1 acres
Tax Parcel: 02-202-008



Legend

-  Rezoning Parcel
-  Parcels
-  Roads
-  2023 Structures

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

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



0 500 1,000 2,000 Feet

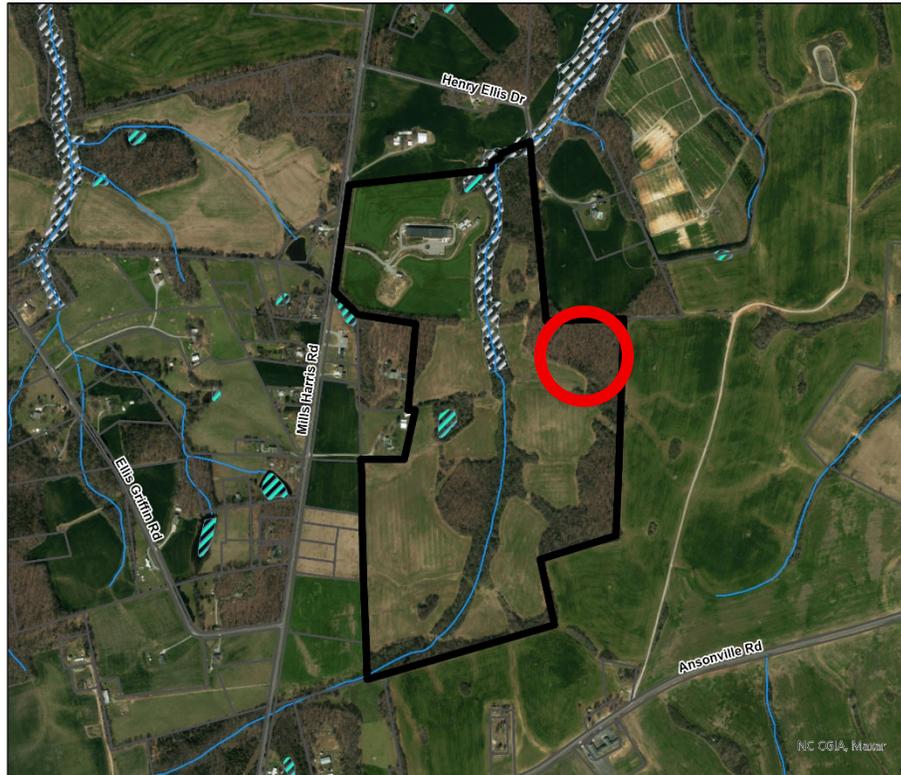
Created on July 11, 2025 by Bjorn E. Hansen, AICP CTP.
Contact: (704) 283-3690 or bjorn.hansen@unioncountync.gov

Environmental Features: There is a stream and floodplain in the central part of the overall parcel, but there is none specifically where the electrical facility will be located.

Environmental Features

Petition: 2025-CZ-008
Name: Union Power

Size: 161.1 acres
Tax Parcel: 02-202-008



0 500 1,000 2,000
Feet

Created on July 11, 2025 by Bjorn E. Hansen, AICP CTP.
Contact: (704) 283-3690 or bjorn.hansen@unioncountync.gov

Legend

-  Rezoning Parcel
-  Parcels
-  Roads
-  Streams
-  Wetlands Areas
-  500 Year Flood Plain

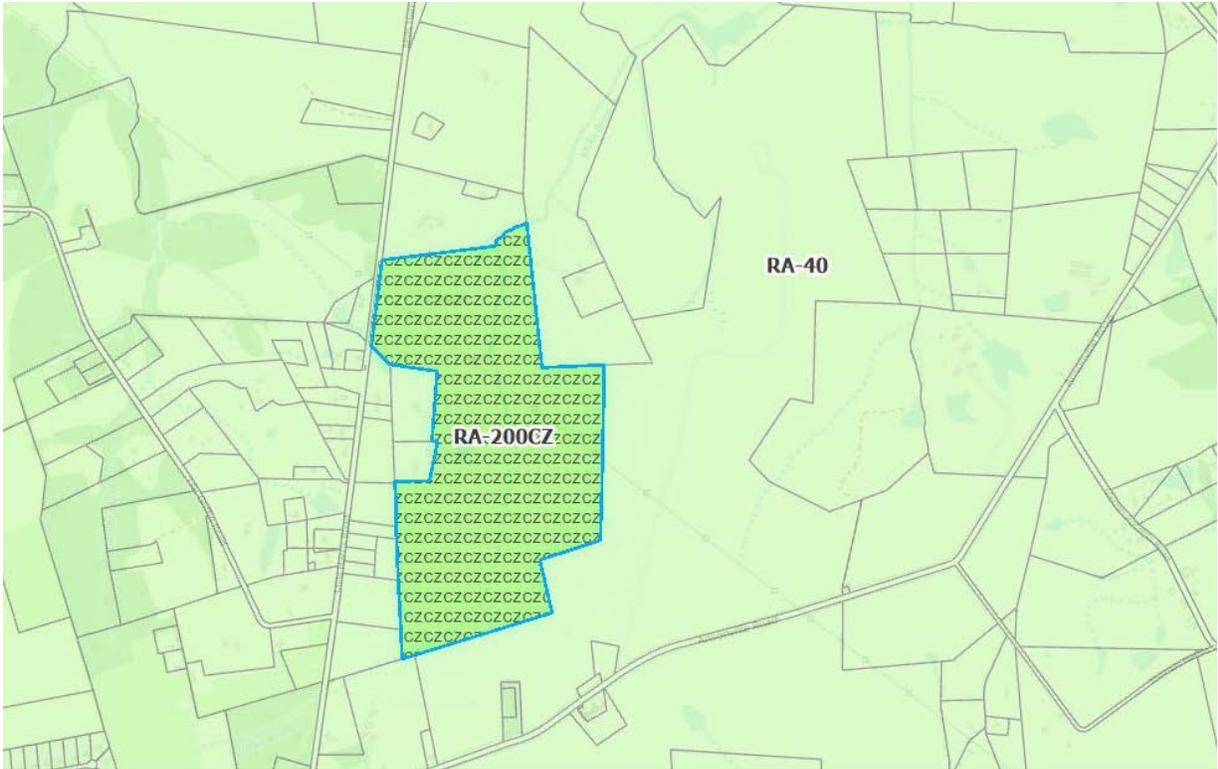
Data Disclaimer
The purpose of the Union County GIS Department includes maintaining geographical information about Union County in electronic format. Please note that inadvertent errors can occur, and information provided by this Department is not intended to replace any official source of information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

Map Disclaimer
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Utilities: Public water and sewer are not available to the site. The proposed use will not require utility service.

Zoning and Land Use History: The parcel site was rezoned to RA-200 with conditions in 2018 to develop the Sheriff's Department training facility. A special use permit on the same site was denied in 2006. There have been no other zoning actions in the immediate vicinity of the proposed rezoning.



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

Transportation: This parcel is on Mills Harris Road, which is a NCDOT-maintained facility. The proposed use would not have access from Mills Harris Road, however. The use would have access from a private easement onto Ansonville Road, which carries approximately 1,500 vehicles per day. The proposed use would have a very low traffic impact, mainly to service the equipment on site as needed. There are no funded road improvement projects in the immediate vicinity of the rezoning. A traffic Impact Analysis was not required for this rezoning.

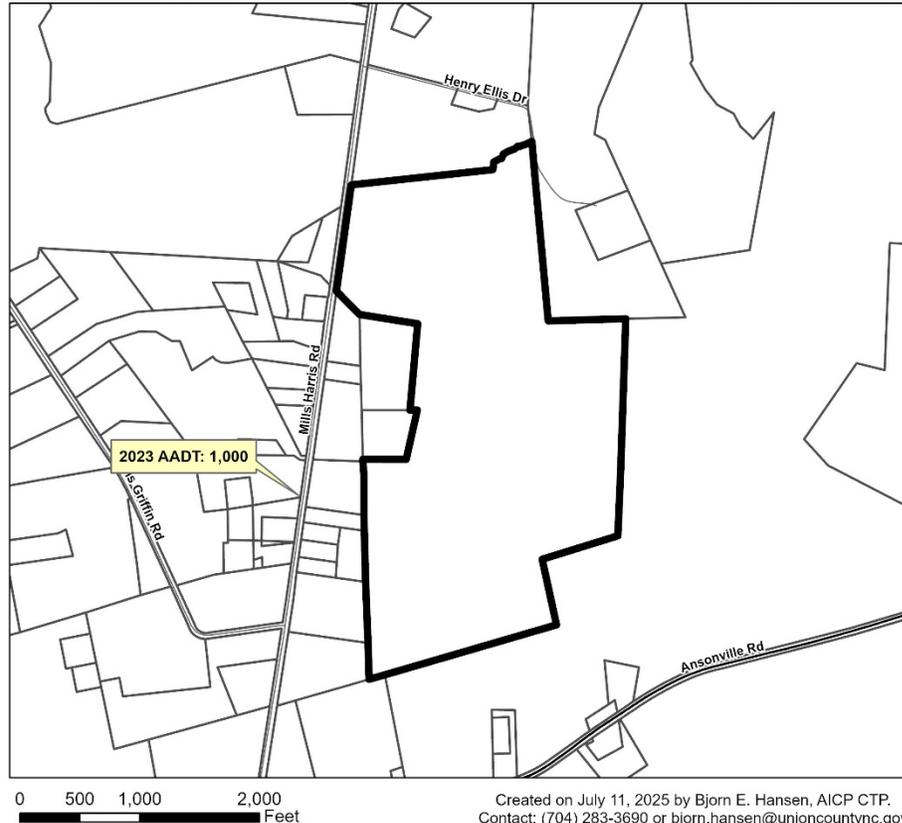
Transportation

Petition: 2025-CZ-008

Name: Union Power

Size: 161.1 acres

Tax Parcel: 02-202-008



Legend

-  Rezoning Parcel
-  Parcels
-  Needs Improvement, Minor Thoroughfare
-  Roads

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Planning Documents

Union County Comprehensive Plan: The Union County 2050 comprehensive plan identifies this area as a Rural Residential area. The uses proposed under RA-200 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:

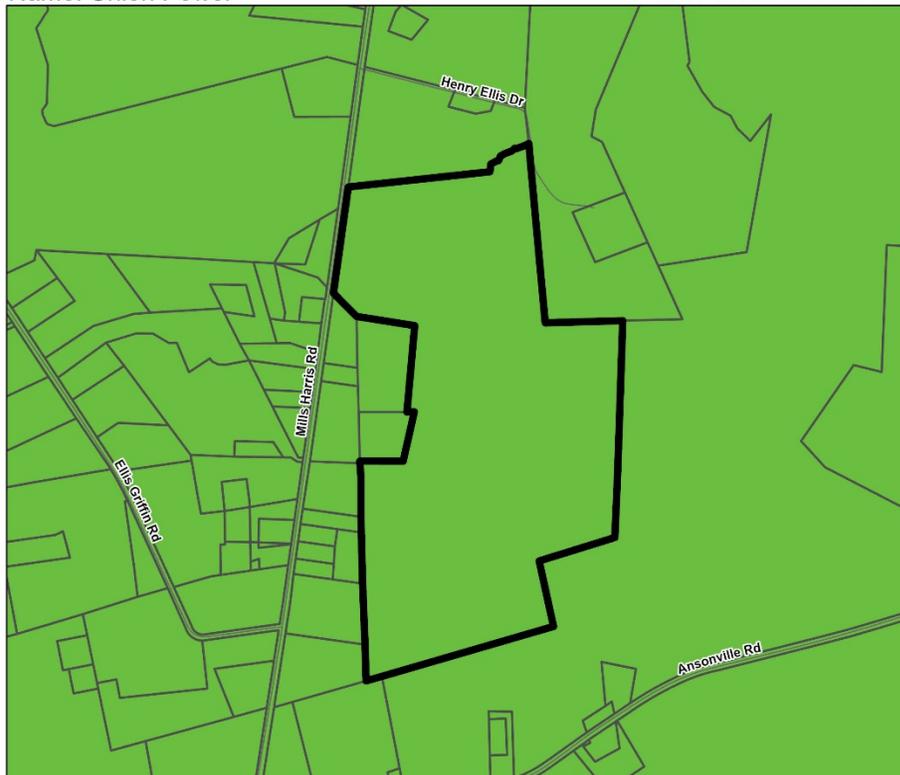
1. The proposed use and development comply with all regulations and standards generally applicable within the zoning district and specifically applicable to the particular type of special use.
2. The proposed development will not materially endanger the public health or safety.
3. The proposed development 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.

Land Use Map

Petition: 2025-CZ-008
Name: Union Power

Size: 161.1 acres
Tax Parcel: 02-202-008



Legend

-  Rezoning Parcel
-  Parcels
-  Roads
-  Rural Residential

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0 500 1,000 2,000
Feet

Created on July 11, 2025 by Bjorn E. Hansen, AICP CTP.
Contact: (704) 283-3690 or bjorn.hansen@unioncountync.gov

Public and Municipal Comments

Public Comments: A community meeting was held August 27, 2025. Four members of the public attended. They did not oppose the proposed use but had questions about gating the private drive to the facility and additional uses that could be placed on the property. No changes were made as a result of the meeting.

No one spoke at the Land Use Board meeting.

Municipal Comments: Wingate was not consulted for comments due to the distance to the town limits.

Land Use Board Recommendation

The Land Use Board unanimously recommended approval of the proposed rezoning at its September 16, 2025, meeting.

Staff Comments and Recommendation

This part of Union County is identified for rural residential and agricultural land uses. The land use map does not specifically identify where electrical substations should be located, which is the reason for the Special Use Permit process. The applicant has demonstrated that the proposal meets the required findings of fact for approval in the RA-200 zoning district. **Because of these aspects of the development, staff recommend approval of this rezoning application.**

BOCC Motions for Proposed Amendment to the Union County Zoning Map (CZ-2025-008)

The Union County Land Use Board recommended that the Union County Board of Commissioners approve the rezoning petition (CZ-2025-008) submitted by Union Electric Membership Corporation (Union Power), requesting a revision of the Union County Zoning Map by rezoning one parcel totaling 161.03 acres appearing on the tax map as tax parcel 02-202-008 along Mills Harris Road from RA-200 CZ to RA-200 CZ with Amended Conditions.

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

Motion

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

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

Motion

(i) Deny rezoning petition CZ-2025-008 from Union Electric Membership Corporation (Union Power); 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-2025-008) submitted by Union Electric Membership Corporation (Union Power), requesting a revision of the Union County Zoning Map by rezoning one parcel totaling 161.03 acres appearing on the tax map as tax parcel 02-202-008 along Mills Harris Road from RA-200 CZ to RA-200 CZ with Amended Conditions.

CONSISTENCY AND REASONABLENESS STATEMENT FOR APPROVAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN) (CZ-2025-008)

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

1. The proposed use under the amendment is consistent with the Plan. The Plan’s Land Use Map identifies this area as Rural Residential. The Plan provides that rural residential areas are identified for agricultural and low-density residential development. This amendment does not increase the density of development from an overall low density.
2. Major utility facilities are allowed in this district with a special use permit. The applicant has included all the information required for special use approval with the conditional zoning map amendment application.
3. The proposed amended use will not be visible from the road, preserving the rural character of the area. The importance of preserving the rural character of rural residential areas is noted in the Plan.
4. The use set forth under the conditions would meet Union County development standards.

**CONSISTENCY AND REASONABLENESS STATEMENT FOR DENIAL OF THE
PROPOSED AMENDMENT (THE PROPOSAL IS INCONSISTENT WITH THE
CURRENT PLAN) (CZ-2025-008)**

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

1. The Plan’s Land Use Map identifies this area as Rural Residential. Rural residential areas are identified in the Plan as those parts of the county expected and intended to retain an agricultural or low-density residential pattern. The proposed amended use is neither agricultural or low-density residential in nature.
2. The proposed use involves the removal of approximately two acres of trees. The preservation of tree cover is noted as a goal to support 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-2025-008) submitted by Union Electric Membership Corporation (Union Power) (the “Applicant”), requesting a revision of the Union County Zoning Map by rezoning one parcel totaling 161.03 acres appearing on the tax map as tax parcel 02-202-008 along Mills Harris Road from RA-200 CZ to RA-200 CZ with Amended Conditions; 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 parcels from RA-200 with Conditions to RA-200 with Amended 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 02-202-008 in the Marshville Township from RA-200 with Conditions to RA-200 with Amended Conditions.
2. The conditions accepted by the Applicant are hereby approved and incorporated into the RA-200 with Amended Conditions rezoning of the parcel.
3. This ordinance is effective upon adoption.

Adopted this ____ day of _____, 2025.

Chair, Union County Board of Commissioners



Union County, NC

Staff Report

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

File #: 25-604

Agenda Date: 10/6/2025

TITLE:

Public Hearing - Step 2 Economic Development Incentive Grant Request to Safe Fire Detection, Inc. (Project Smokey)

INFORMATION CONTACT:

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

ACTION REQUESTED:

Hold Public Hearing.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Economic Development Department started conversations with Safe Fire Detection, Inc under codename Project Smokey in 2023 about the potential relocation of their manufacturing operation from Indian Trail, NC, to a 10-acre parcel located within the Piedmont Innovation Industrial Park off Goldmine Road or a 14-acre parcel located in the Monroe Corporate Center. The company is considering the purchase of either the 10-acre parcel or the 14-acre parcel, the construction of a 40,000 square foot manufacturing facility, and the purchase and installation of new production equipment. Total capital investment is approximately \$10,000,000.

Safe Fire Detection, Inc. is a manufacturer of advanced fire detection systems for several key industry sectors including nuclear power, electric utilities, Petro-chemical, and space exploration. The company opened its doors in 1985 in Indian Trail. They have grown to employ 25 people, of whom 16 are Union County residents.

The company is at capacity at its current location and needs a building and land large enough to accommodate future business growth. The purchase of either parcel and the construction of a 40,000 SF facility would satisfy growth needs for years to come.

Based on the anticipated capital investment, it is proposed that the Board award a STEP 2 Economic Development Incentive Grant in an amount-not-to-exceed \$141,000 paid over a 5-year period beginning in FY 2028. The value of the incentive grant will be based upon appraised value each year as appraised by the Union County Tax Administration Office. This grant is based on the company's projected investment of approximately \$10,000,000 in land, new building construction, and purchase and installation of new manufacturing equipment over the grant period, but not less than \$2,000,000. Based on its projected investment in Union County, the current tax rate, and assuming a consistent assessed value with no depreciation, the company will pay estimated ad valorem taxes on the new

taxable investment in the amount of \$217,000 over the grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.

The grant is also contingent upon the company retaining its current number of employees located within Union County and creating a minimum of 10 new full-time jobs.

FINANCIAL IMPACT:

The project, if brought to Union County, would have an economic development incentive grant in an amount-not-to-exceed \$141,000 but would generate approximately \$217,000 in ad valorem taxes over the 5-year grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.



Union County, NC

Staff Report

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

File #: 25-600

Agenda Date: 10/6/2025

TITLE:

Popular Annual Financial Report Award

INFORMATION CONTACT:

Beverly Liles, Finance Director, 704-283-3675

ACTION REQUESTED:

Recognize Finance Staff for this Award.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Government Finance Officers Association is pleased to announce that Union County has received GFOA's Award for Outstanding Achievement in Popular Annual Financial Reporting (PAFR Award) for its Popular Annual Financial Report for the fiscal year ended June 30, 2024.

The Award represents a significant achievement by the entity. In order to be eligible for the PAFR Award, a government must also submit its annual comprehensive financial report to GFOA's Certificate of Achievement for Excellence in Financial Reporting Program and receive the Certificate for the current fiscal year. Each eligible report is reviewed by judges who evaluate the report based on the following categories: reader appeal, understandability, distribution methods, creativity and other elements.

Government Finance Officers Association (GFOA) advances excellence in government finance by providing best practices, professional development, resources, and practical research for more than 25,000 members and the communities they serve.

FINANCIAL IMPACT:

None.



Government Finance Officers Association
203 North LaSalle Street, Suite 2700
Chicago, Illinois 60601-1210
312.977.9700 fax: 312.977.4806

8/29/2025

Beverly Liles
Finance Director
Union County

Dear Beverly:

A panel of independent reviewers has completed its examination of your Popular Annual Financial Report (PAFR) submitted to Government Finance Officers Association (GFOA). We are pleased to notify you that your PAFR for the fiscal year ended June 30, 2024, has substantially met the requirements of the PAFR Program. In the absence of authoritative standards governing the presentation, these requirements are based on an evaluation of information presented, reader appeal, understandability, distribution, and other elements (such as whether the PAFR is a notable achievement for the government given the government's type and size, and the PAFR's creativity and usefulness). The report received a grade of either partially satisfies, good or excellent in each category weighted at 20% or higher from at least two of the three judges.

Each entity submitting a report to the PAFR Program is provided with confidential comments and suggestions for possible improvements in the subsequent year's presentation. Your comments and suggestions, as well as a "Scoring Summary" form, are included in your electronic award packet. We urge you to carefully consider the suggestions offered by our reviewers as you prepare your next PAFR.

You will also find a PAFR Award enclosed with these results. A current holder of a PAFR Award may include a reproduction of the Award in its immediately subsequent PAFR. A camera-ready copy of your Award is enclosed for that purpose. If you reproduce your Award in your next report, please refer to the enclosed instructions. We hope that appropriate publicity will be given to this notable achievement. A sample news release has been enclosed. First-time recipients will receive a plaque in approximately 10 weeks.

The PAFR Award is valid for one year. To continue your participation in the program, it will be necessary for you to submit your next PAFR to GFOA within six months of the end of your entity's fiscal year.

We appreciate your participation in this program, and we sincerely hope that your example will encourage others in their efforts to achieve and maintain a well-presented PAFR. If we can be of further assistance, please do not hesitate to contact the PAFR Program staff in the Technical Services Center at (312) 977-9700.

Sincerely,

A handwritten signature in black ink that reads "Michele Mark Levine". The signature is written in a cursive, flowing style.

Michele Mark Levine
Director, Technical Services Center



Government Finance Officers Association

Award for
Outstanding
Achievement in
Popular Annual
Financial Reporting

Presented to

**Union County
North Carolina**

For its Annual Financial Report
For the Fiscal Year Ended

June 30, 2024

Christopher P. Morrill

Executive Director/CEO



GOVERNMENT FINANCE OFFICERS ASSOCIATION
NEWS RELEASE

FOR IMMEDIATE RELEASE

8/29/2025

For more information contact:
Michele Mark Levine, Director/TSC
Phone: (312) 977-9700
Fax: (312) 977-4806
Email: mlevine@gfoa.org

(Chicago, Illinois)—Government Finance Officers Association is pleased to announce that **Union County** has received GFOA's Award for Outstanding Achievement in Popular Annual Financial Reporting (PAFR Award) for its Popular Annual Financial Report for the fiscal year ended June 30, 2024.

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Union County, NC

Staff Report

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

File #: 25-603

Agenda Date: 10/6/2025

TITLE:

Service Award Recognition

INFORMATION CONTACT:

Jennifer Davis, Human Resources, Assistant Director, 704-283-3803

ACTION REQUESTED:

Short video will play to recognize employee service award recipients for Q3 including July, August & September.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

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

File #: 25-596

Agenda Date: 10/6/2025

TITLE:

Purchase - Intercom/Door Controls

INFORMATION CONTACT:

Dorothy Thomas, Union County Sheriff's Office, Business Manager, 704-283-3578

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Detention Center contracts with Black Creek Integrated Systems Corp. to service intercom and door control services within the facility. This contract has been in existence since 2011 when the system was initially installed. Since that time, there have been no hardware/software upgrades to the system. The current system is severely outdated and has begun to see critical failures that pose serious safety and security concerns for the facility. Inability to utilize intercoms and/or door controls would not allow for contact with inmates and staff in the event of an emergency. The Union County Sheriff's Office is requesting \$665,063.87 in funds to acquire the software/hardware needed to update the current system, allowing it to perform to the ability needed.

N.C.G.S 143-129(e)(3) and N.C.G.S 143-129(e)(9) allow local governments to make purchases through a competitively bid North Carolina Statewide Term Contract or a Group Purchasing Program. The purchase of the Intercom/Door Control Services will be made using Group Purchasing Program OMNIA Partner IT Products and Services contract #23-6692-03 as quoted by Insight Public Sector, Inc.

FINANCIAL IMPACT:

The anticipated cost for the Intercom/Door Control Services is \$665,063.87 and is budgeted accordingly for FY2026.

Account name: 10520619

UNION COUNTY NC
 500 N MAIN ST STE 901
 MONROE NC 28112

SHIP-TO

UNION COUNTY NC
 500 N MAIN ST STE 901
 MONROE NC 28112

Quotation	
Quotation Number	: 0228788277
Document Date	: 10-SEP-2025
PO Number	:
PO Release	:
Sales Rep	: Scott Lipson
Email	: SCOTT.LIPSON@INSIGHT.COM
Phone	: +15143738351

We deliver according to the following terms:

Payment Terms : Net 30 days
Ship Via : Electronic Delivery
Terms of Delivery : FOB DESTINATION
Currency : USD

Material	Material Description	Quantity	Unit Price	Extended Price
P25011.02	BLACK CREEK SCOPE OF WORK INCLUDES APPLICATION SOFTWARE WITH USER LICENSES (4) FIXED TOUCHSCREEN CONTROL (1) SERVER, (1) UTILITY/DATALOGGER Coverage Dates: 10-SEP-2025 - 10-SEP-2026 OMNIA PARTNERS (COBB COUNTY) IT PRODUCTS AND SERVICES(# 23-6692-03) List Price: 732963.99 Discount: 9.264%	1	665,063.87	665,063.87
			Product Subtotal	665,063.87
			TAX	44,891.81
			<u>Total</u>	<u>709,955.68</u>

Lease & Financing options available from Insight Global Finance for your equipment & software acquisitions. Contact your Insight account executive for a quote.

Thank you for choosing Insight. Please contact us with any questions or for additional information about Insight's complete IT solution offering.

Sincerely,

Scott Lipson
 +15143738351
SCOTT.LIPSON@INSIGHT.COM

To purchase under this contract, your agency must be registered with OMNIA Partners Public Sector.

Insight Global Finance has a wide variety of flexible financing options and technology refresh solutions. Contact your Insight representative for an innovative approach to maximizing your technology and developing a strategy to manage your financial options.

This purchase is subject to Insight's online Terms of Sale unless you are purchasing under an Insight Public Sector, Inc. contract vehicle, in which case, that agreement will govern.

SOFTWARE AND CLOUD SERVICES PURCHASES: If your purchase contains any software or cloud computing offerings ("Software and Cloud Offerings"), each offering will be subject to the applicable supplier's end user license and use terms ("Supplier Terms") made available by the supplier or which can be found at the "terms-and-policies" link below. By ordering, paying for, receiving or using Software and Cloud Offerings, you agree to be bound by and accept the Supplier Terms unless you and the applicable supplier have a separate agreement which governs.

Insight's online Terms of Sale can be found at the "terms-and-policies" link below.

<https://www.insight.com/terms-and-policies>



Union County, NC

Staff Report

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

File #: 25-609

Agenda Date: 10/6/2025

TITLE:

Contract - Landscape Restoration Services

INFORMATION CONTACT:

Christopher Clark, UC Water - Water & 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' maintains and operates over 1,000 miles of water system infrastructure and over 700 miles of wastewater infrastructure. A large portion of the combined 1700+ miles of piping is located near roadway shoulders, and both residential and commercial areas. Once water/sewer lines are repaired due to age, material, pressure, third-party damage, etc., numerous restoration activities may be required to take place. The activities include compaction, landscaping, and sod repairs, among others. Due to this service requiring a very specific skill set and potential scheduling implications, this restoration service has been conducted by industry professionals. This effort has shown a great improvement in customer service by reducing the time required to restore yards, roadway areas, and commercial property.

The Procurement Department partnered with Union County Water to issue a Request for Proposals RFP 2025-024 Landscape Restoration Services. On June 5, 2025, one proposal was 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, Locust Property Management, LLC , to provide landscape restoration services. This contract has an initial term of three years with two one-year renewal options at the sole discretion of the County and is subject to annual budget appropriation.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$300,000. Since this contract contains an initial term of three years, with two one-year renewal options, a total of \$1,500,000 is estimated to be spent. Funding is available in the adopted FY26 budget with future expenditures subject to annual BOCC budget appropriation.

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 LOCUST PROPERTY MANAGEMENT, LLC, a North Carolina limited liability company, whose address is 2308 Unionville Indian Trail Road West, Indian Trail, NC 28079, hereinafter “Contractor.”

W I T N E S S E T H

WHEREAS, Union desires that Contractor perform certain landscape restoration 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 in accordance with, and as further described in (i) Union’s Request for Proposal No. 2025-024R, “Landscape Restoration Services” (the “RFP”); and (ii) Contractor’s proposal (the “Proposal”), which are each attached and incorporated herein by reference (hereinafter, the “Services”), to the extent they do not conflict with the terms and provisions of this agreement document. The contract documents shall be comprised of this agreement document (pages 1-6), the RFP, and the Proposal (collectively referred to herein as the “Agreement”). In the event of any conflict among the contract documents, the RFP shall govern over the Proposal, and this agreement document (pages 1-6) shall govern over the RFP and the Proposal. In performing the Services, Contractor shall comply with all applicable laws. Union is not obligated by this Agreement to purchase any minimum amount of Services.

2. FEE AND PAYMENT SCHEDULE. Union shall pay Contractor for performance of the Services in accordance with the unit pricing set forth in the Proposal. Contractor shall invoice Union for Services after completion of any Services completed pursuant to Section 1 herein. Payment is due within thirty (30) days of receipt of an accurate invoice by Union’s Finance Department. 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 three (3) years (the “Initial Term”). Upon completion of the Initial Term, Union may, in its sole discretion, elect to renew this Agreement for up to two (2) additional one (1)-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 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

LOCUST PROPERTY MANAGEMENT, LLC

By: _____ (SEAL)

Approved as to Legal Form RLM

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. 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
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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 & Wastewater
Contract #: 9886
- 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 Proposal No. 2025-024R

Landscaping Restoration Services

Due Date: June 26, 2025
Time: 10:00 AM Local Time
Submittal Location: Electronic Submission
Union County Government Center
Procurement and Contract Management Department
500 N. Main Street, Suite 709
Monroe, NC 28112

Non-Mandatory Pre-Proposal Conference

Date: April 28, 2025
Time: 10:00 AM Local Time
Location: 4600 Goldmine Road, Monroe NC 28110

Procurement Contact

Kyle Hodge
Procurement Specialist
704.283.3631
Kyle.Hodge@unioncountync.gov

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1 NOTICE OF ADVERTISEMENT

Union County, North Carolina Request for Proposals No. 2025-024 Landscaping Restoration Services

Electronic proposals will be received by the Union County's Procurement and Contract Management Department at the Union County Government Center, 500 North Main Street, Monroe, NC 28112, until **10:00 AM Local Time on June 26, 2025.**

Union County, North Carolina, through the Union County Water Department, is seeking proposals from qualified landscaping contractors to provide various landscaping restoration services in Union County.

RFP No. 2025-024 may be examined at the Union County Government Center, Procurement and Contract Management Department, 500 North Main Street, Suite 709, Monroe, NC 28112, Monday through Friday between the hours of 8:00 am and 5:00 pm. Copies of the solicitation may be obtained from the locations listed below:

1. Download the Solicitation 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 eVP website: <https://evp.nc.gov/solicitations/> (Search County of Union)

A Non-Mandatory, Pre-Proposal Conference & Site Visit will be held on April 28, 2025 at 10:00 AM Local Time at the Operations Center, 4600 Goldmine Road, Monroe NC 28110. Representatives from the Union County Water Department 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 RFP Documents are to be submitted in writing to the Procurement Representative listed on the cover page (kyle.hodge@unioncountync.gov) no later than June 19, 2025, at 3:00pm.

Union County reserves the right to reject any or all proposals, to waive technicalities and to make such a selection deemed in its best interest.

Bidders are required to comply with the non-collusion requirements set forth in the Bidding Documents.

Union County encourages good faith effort outreach to Minority Businesses (HUB Certified) and Small Businesses.

End of Advertisement

2 SUBMITTAL DETAILS

2.1 PROPOSAL SUBMISSION DEADLINE

All Proposals are to be received electronically by the Union County Procurement and Contract Management Department no later than June 26, 2025 at 10:00 am per the instructions below. Any proposals 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>. The proposal must be signed by a person who is authorized to bind the proposing Company. Instructions for preparing the proposal are provided herein.

Select the solicitation drop down arrow and choose this RFP from the list. Complete the form, upload your proposal as one (1) complete document, and select submit. The maximum accepted size is 30 MB. A delivery notification email, from LF-Forms@co.union.nc.us, will be sent as your confirmation of receipt.

Paper submissions and/or email submissions 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 NON-MANDATORY PRE-PROPOSAL CONFERENCE

A Non-Mandatory Pre-Proposal Conference will be held on April 28, 2025 at 10:00am Local Time at the Union County Operations Center, 4600 Goldmine Road, Monroe, NC 28110.. Representatives from Union County Water will be on-hand to give a brief overview of the project and to answer questions. Although attendance at this meeting is not mandatory, it is strongly encouraged.

2.4 PROPOSAL QUESTIONS

Proposal questions will be due on or before June 19, 2025, at 3:00 PM Local Time. The primary purpose of this is to provide participating vendors with the opportunity to ask questions, in writing, related to the RFP.

Submit questions by email to Kyle Hodge at kyle.hodge@unioncountync.gov by the deadline shown above. The email should identify the proposal number and title. All questions and answers may be posted as addenda on the Union County Website or the State of North Carolina eVP Website as indicated on the advertisement page.

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 INTRODUCTION

3.1 COUNTY

The County (estimated population 256,452) 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 PURPOSE

Union County is seeking proposals from qualified landscape contractors to provide various landscaping repair work resulting from Union County Water utility repair activities in Union County.

4 SCOPE OF WORK

This proposal addresses various landscaping repair work resulting from Union County Water utility repair activities. The scope will typically be to complete landscaping following a water or sewer repair but may include placement and compaction of backfill or other related work.

1. All work must begin within ten (10) days of notification by Union County.
2. All work must be performed in a neat and professional manner that is aesthetically pleasing in order to restore damaged area to "original condition".
3. No payment will be made for temporary closure or re-excavation of work areas.
4. The Contractor shall have sufficient resources (manpower, supervision, and equipment) necessary to perform work to the specifications.
5. No additional work or deviation from the project assignments shall be allowed without
6. Work requested by the property owner, which is not part of the approved assignments/specifications, must be contracted between the property owner and the Contractor. Any additional work by the Contractor for the homeowner shall not begin until

all of Union County's work has been completed and accepted. Union County will not be responsible for payment of any additional work performed by the Contractor for property owners. The Contractor shall not suggest or recommend additional work to the property owners during the performance of the work contracted with Union County. The Contractor will immediately correct problems associated with his/her faulty or poor workmanship at his/her own expense.

7. No guarantees will be made of size, amount, or quantity of any specified work orders/projects.

4.1 COMPLAINT RESOLUTION PLAN

The Contractor must provide a supervisor to be available by phone 24 hours a day, 7 days a week to answer emergency calls related to the Contractor's work and job sites.

The Contractor must respond immediately when called with emergency situations involving job site safety; unsafe traffic control; ingress/egress concerns or other potentially dangerous situations caused by the Contractor's work.

Non-emergency complaints regarding the Contractor's work/workmanship must be responded to within 24 hours.

4.2 EMERGENCY WORK

Union County Water Department may require repairs to be made immediately due to major roadway damage or other unforeseen circumstances. These projects (work orders) will be of the utmost priority and shall be completed immediately. Contractor will be notified of any emergency repairs as they exist by Union County Water representative.

4.3 CONFORMITY WITH WORK ORDERS AND SPECIFICATIONS

The Contractor shall employ sufficient labor and equipment for executing the work to full completion in the manner and time required by these specifications.

The Contractor will be required to execute the work in a continuous and uninterrupted manner upon notification by Union County Water Department via fax, email, or phone on each location. It will be the responsibility of the Contractor to keep Union County Water Department informed of his/her schedule, work plan, and progress and to submit weekly reports in an electronic format approved by Union County Water Department of work order status to the appropriate Union County Water representative.

Any person employed by the Contractor or by any Subcontractor during the life of this project who, in the opinion of Union County Water Department, does not perform his/her work in a proper and skillful manner or is disrespectful, intemperate, or disorderly shall, be removed forthwith by the Contractor or Subcontractor from the project, and shall not be employed again without prior approval.

The supervisor of the crew at a minimum shall speak fluent English as to have the ability to communicate with Union County Water Department staff and/or the resident.

In the event Union County Water Department finds the materials or the finished product in which the materials used or the work performed have resulted in an inferior or unsatisfactory

product, the work or materials shall be removed and replaced by the contractor at no cost to Union County.

All equipment which is proposed to be used for the work of this contract is to be of sufficient size and in such mechanical condition as to meet the requirements of the work and to produce a satisfactory quality of work. Equipment used on any portion of the project shall be such that no injury to the roadway or other public or private property will result from its use.

4.4 GUARANTEE

The Contractor shall guarantee all materials and workmanship for a period of one (1) year from the date of acceptance by Union County and shall replace any portions that fail because of faulty materials or workmanship at no additional cost. Items repaired under the provisions shall have an extended warranty period of one (1) year from the date of repair of the item.

4.5 PROJECT (WORK ORDERS)

A project shall be defined as work orders and/or the construction services to be performed at a specific location(s). Union County Water will submit a work order (standard form) to the contractor via email indicating location, type of work to be performed, approximate size area, any special conditions, and contact information.

4.6 ADJUSTMENT OF MANHOLES, METER AND VALVE BOXES

The contractor may request Union County Water to adjust manholes, meter boxes, valve boxes, etc. prior to project completion. This will be completed at no cost to the contractor if adjustments to the above items are due in part to Union County Water Department's construction activities. Any damage to these structures as a part of the contractor's project completion will be charged against the paid sum for that project.

4.7 RETURN OF COUNTY-OWNED TRAFFIC CONTROL DEVICES

There may be occurrences where Union County Water Department has left traffic control devices at the work site for the protection of the public. It shall be the contractor's responsibility to return such equipment to the Union County Water Department Operations Center, 4600 Goldmine Road Monroe, NC 28112, at no charge to Union County.

5 SPECIFICATIONS

5.1 LANDSCAPING

Description: The work covered by this special provision includes:

5.1.1 SEED AND MULCHING:

- Fine grading (to include removal of unsuitable material) to match existing grades and maintain drainage.
- Furnishing, placing, and covering with pelletized lime and fertilizer (10-10-10) and seed at manufacturer's recommended coverage rate.
- Acceptable seed mixtures are as follows:
 - Rebels Tall Fescue Mixture at a rate of 8 lbs. per 1,000 SF
 - Rebels Southern Classic Blend at a rate of 8 lbs. per 1,000 SF
 - Other approved fescue blends at rates of 8-10 lbs. per 1,000 SF

- Cover area with straw blanket of clean wheat straw or similar approved netting material – securing properly. Straw shall be applied at a rate that allows for proper shading of new grass, but not too thick as to mat and prevent grass growth. 50%-70% coverage of straw is acceptable. In ditch line areas where concentrated water may flow, Union County Water may require the placement of excelsior type matting. Seedbed preparation and the application of lime, fertilizer, and seed shall be performed as normal. Matting shall be installed and stapled as required.
- Removal of any damaged existing sod utilizing a sharp-edged tool (sod knife) to cut a clean edge along the repair area.
- Scarify the soil to a depth of 4-inches minimum to provide for adequate root growth. The repair area should be free of large rocks, dirt clods, and other objectionable material.
- Fine grading (to include removal of unsuitable material) to match existing grades and maintain drainage
- Replace entire disturbed area with fresh sod to match existing area and sod type. If multiple sections of sod are required, stagger the joints.

5.1.2 OTHER

- Other operations necessary for the permanent establishment of grasses and legumes on lawns, shoulders, slopes, ditches, and on all earth areas disturbed by construction due to Union County Water activities.
- Any shrubs, flowers, plantings, etc. which may require replacement shall only be replaced upon approval from Union County Water.
- Contractor is required to make contact with property owner(s) to discuss proper care and maintenance procedures necessary to ensure establishment of sod, grasses, legumes, plantings, etc. Door hangers, brochures, flyers, etc. is the preferred method to inform property owners of the necessary care and maintenance requirements. Please provide Union County Water a copy of any door hangers/brochures/flyers to be used for approval.
- Initial watering of sod, grasses, and legumes may be necessary to ensure proper establishment. This requirement, if necessary, will be at the expense of the contractor.

Measurement: The quantity of sod and/or seed placement to be paid for will be the actual number of square feet measured along the surface of the ground, which has been completed and accepted. The quantity of shrubs, flowers, plantings, etc. to be paid for will be the actual number of plantings which have been installed and accepted.

The quantity of sod and/or seed placement, measured as provided above, will be paid for at the contract unit price per square foot. Such payment will be full compensation for all work covered in this special provision, including fine grading, soil preparation, furnishing and applying seed/sod, fertilizer, and other materials. Replacement of shrubs, flowers, plantings, etc. shall be paid at cost of materials. Labor associated with the installation of shrubs, flowers, plantings, etc., shall be paid at the contract unit price (percentage (%) above purchase price of plantings). Payments will be made under:

Sod.....SF
 Seed and Mulching - SF Shrubs, flowers, plantings, etc.....At Cost

Installation -- Shrubs, flowers, plantings, etc..... %

5.2 TRAFFIC CONTROL

The Contractor is responsible for notifying the Union County Communications (Police & Fire) and NCDOT of any work where the number of travel lanes is reduced from normal conditions.

The Contractor shall install advance warning signs for the project(s) as necessary. The Contractor shall begin construction activity on a street on the scheduled date for the closing of the travel lane.

During daily construction work hours, the Contractor will maintain at least one lane of traffic. During periods of construction inactivity, all lanes of traffic will be open unless otherwise specified.

Contractor will not be required to obtain NCDOT Encroachment Agreements, while working within NCDOT Right-of-Ways, prior to any work related to this contract as a result of Union County Water construction activities. However, Contractor must comply with the requirements set forth in the NCDOT Encroachment Agreement.

Traffic control will be carried out by the Contractor based upon the latest NCDOT Traffic Control Provisions. Union County Water will not be responsible for any violation of NCDOT traffic control procedures or any damages as a result thereof. The Contractor shall be thoroughly familiar with the latest edition of the Manual on Uniform Traffic Control Devices, the current edition of the North Carolina Department of Transportation (NCDOT) Supplement to the Manual on Uniform Traffic Control Devices for Streets and Highways, the NCDOT Roadway Standard Drawings and the current edition of the NCDOT Standard Specifications for Roads and Structures. All traffic control devices and procedures shall conform to the above standards as applicable.

The Contractor shall use flagger control in accordance with all NCDOT flagger control training and standards.

The Contractor will be required to maintain ingress and egress to all businesses and dwellings, and easy access to fire hydrants during repair(s).

The Contractor shall not work on both sides of the road simultaneously within the same area unless approved by Union County Water Department.

The Contractor shall mark all hazards within the work area limits with well-maintained signs, barricades, warning and/or channelizing devices.

Traffic Control Devices: The Contractor shall furnish, install, operate, relocate, maintain and remove all temporary traffic control devices necessary for controlling traffic in accordance with NCDOT requirements. The Contractor shall notify NCDOT before installation, removal or relocation of any permanent signs within the right-of-way. All construction signs and barricades shall remain in place until the appropriate permanent signs and pavement markings are re-installed.

Pedestrian Considerations: The Contractor shall accommodate the needs of all pedestrians.

Equipment and Material Storage: During periods of construction inactivity, all construction materials and equipment shall be stored by the Contractor properly so as not to disturb the public or as deemed necessary by NCDOT. The Contractor shall not disturb any traffic signal equipment without prior written approval from NCDOT and notification to Union County Water.

Measurement: Traffic Control shall be measured as a unit price for each work order issued where traffic control is necessary.

Payment: Payment will be made under "Traffic Control". Only one traffic control payment shall be made per work order, if necessary for proper completion and worker/public safety.

Traffic Control.....EA

5.3 SELECT MATERIAL

Description: Work covered in this special provision consists of furnishing, placing, and compacting select material as directed.

It is anticipated that select material will be used as structural backfill to replace soil deemed unsuitable. The Contractor shall not remove soil from the Project without approval from Union County Water. Select material shall not be used without prior Union County Water consent.

Materials: Select material shall meet the requirements of NCDOT Standard Specifications for Roads and Structures, with written approval and without additional compensation, a higher class of material than stated in the plans or specifications may be substituted.

Measurement: The cost to furnish, haul, place and compact select material that meets the requirements will be included in the lump sum price bid for "Select Material". Where select material is used, the quantity of select material to be measured and paid for will be the actual number of tons of select material, weighed in trucks on certified platform scales or other certified weighing devices that have been hauled to the job site and incorporated into the completed and accepted Project.

If the Contractor brings select material onto the Project for its own convenience, that material will not be measured or paid for as Select Material.

Payment: Select material, measured as provided above, will be paid for at the contract unit price per ton for "Select Material". Such payment will be full compensation for all work covered by this special provision, including but not limited to furnishing, hauling, placing and compacting select material.

Payment will be made under:

Select MaterialTN

Mobilization: The Contractor shall be paid a mobilization fee for each project site as a minimum payment. A work order may contain one or more project sites for repair. This fee is in addition to work completed and paid by other unit prices. If projects are within one (1) mile (as measured by roadways) of other projects, only one (1) mobilization charge will apply. If projects are more than one (1) mile apart, Contractor shall be paid mobilization for each project

on the work order. Union County Water has established a mobilization charge for each project to be \$300.00 per site. If a Contractor believes that this mobilization fee does not accurately reflect his mobilization costs, additional compensation needs to be placed on other unit price items.

6 DETAILED SUBMITTAL REQUIREMENTS AND INSTRUCTIONS

6.1 TERMS OF SUBMISSION

All material received from a person or company (“Respondent”) in response to this solicitation shall become the property of Union County and will not be returned to the Respondent. Any and all costs incurred by a Respondent in preparing, submitting, or presenting submissions are the Respondent’s sole responsibility and Union County shall not reimburse the Respondent. 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 Respondent 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 Respondent 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. Respondent 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 Respondent’s materials which was properly labeled by the Respondent as a trade secret, Union County will notify the Respondent of the request and the date that such materials will be released to the requestor unless the Respondent obtains a court order enjoining that disclosure. If the Respondent fails to obtain the court order enjoining disclosure prior to that date, Respondent understands and agrees that Union County will release the requested information to the requestor on that date.

Furthermore, the Respondent 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 Respondent.

6.2 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 Offeror’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 Section 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 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.

Proposals must not exceed 25 pages, 8 1/2" x 11" with one (1) inch margins typed with Arial or Times New Roman font, and text size minimum of eleven (11) points. All proposals must include titles that correspond with the bolded sections and subsections to which the information pertains. *Charts and screenshots are not restricted to formatting requirements; however, please use your judgment for decipherability. Resumes do not count against the 25 total proposal pages.*

The RFP should include a response to each of the following criteria. **Failure to address each area could result in rejection of a proposal.** Please provide a table of contents in the format of the proposal requirements identifying each section and subsection. Include examples of procedures, reports, or other information where applicable.

The proposal should be organized and identified by sections using labeled titles:

- **Section A** – Cover Letter
- **Section B** – Company and Qualifications
- **Section C** – Project Approach
- **Section D** – References
- **Section E** – Required Forms
 - Appendix A – Cost Form
 - Appendix B – Proposal Submission Form
 - Appendix C – Addenda Receipt and anti-Collusion

Omissions and incomplete answers may be deemed unresponsive.

6.2.1 SECTION A – COVER LETTER

The cover letter shall briefly introduce your firm, principal in charge, and area(s) of experience in which your firm is seeking consideration. Also, include the following:

- Expression of firm's interest in the work.
- Statement of whether firm is on register with the Secretary of State.
- Legal company name and DBA (if applicable).
- Corporate headquarters' address, phone number and Website address.
- Location Providing Service (if different from headquarters), address and telephone number.
- Required: Name of single point of contact, title, direct telephone number and/or extension and direct email address.
- Name of person with binding authority, title, address, direct telephone number and/or extension and email address.

- Make the following representations and warranty in the cover letter, the falsity of which might result in rejection of its Statement of Qualifications:
 - “The information contained in this SOQ 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 SOQ 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.”

6.2.2 SECTION B – COMPANY AND QUALIFICATIONS

This section provides each company with the opportunity to demonstrate how its history, organization, and partnerships differentiate it from other companies. Careful attention should be paid to providing information relevant to Union County needs.

- Provide company history, and number of years in business under the current organizational name, structure and services offered.
- Describe your company’s complete corporate structure, including any parent companies, subsidiaries, affiliates and other related entities.
- How many public sector (cities and counties) clients does your company have?
- Provide a management organization chart of your company including director and officer positions and names and the reporting structure.
- Are audited or otherwise verifiable financial statements available upon request?
- Is the bidder’s organization involved in any pending litigation that may affect its ability to provide its proposed solution or ongoing maintenance or support of its products and services.
- Recent results of client feedback (survey results, comments, etc.) for a similar service.

6.2.3 SECTION C – PROJECT APPROACH

- Provide a detailed description of a work plan and the methods to be used that will demonstrate to the County what the Vendor intends to do, the timeframes necessary, and how the work will be completed. This includes a daily operating schedule.
- Describe the communications scheme that the organization will use to keep the County informed about the progress of the project.
- Provide a list of equipment that will be used during this contract.

6.2.4 SECTION D - REFERENCES

List three (3) client references with which you have had contracts currently or within the past three (3) years for this service. Please provide the following for each client:

- a. Name of Company/Government Entity
- b. Address
- c. Project Name
- d. Contact Name and Title
- e. Phone Number
- f. Email Address
- g. Length of Service

6.2.5 SECTION E – REQUIRED FORMS

Offerors must include signed copies of the following documents in this section:

1. Appendix A – Cost Form

2. Appendix B – Proposal Submission Form (signed)
3. Appendix C – Addenda Receipt and Anti-Collusion (signed)

7 EVALUATION CRITERIA AND SELECTION PROCESS

7.1 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. Union County reserves the right to conduct interviews with a shortlist of selected Offerors. Failure to abide by this requirement shall be grounds for disqualification from this selection process.
3. The Owner will establish an RFP Evaluation Team to review and evaluate the RFPs. The RFP Evaluation Team will evaluate the RFPs independently in accordance with the published evaluation criteria. Union County reserves the right to conduct interviews with a shortlist of selected respondents.
4. At its sole discretion, the Owner may ask written questions of Offerors, seek written clarification, and conduct discussions with Offerors on the RFPs.
5. 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.

7.2 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 Owner 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 Evaluation Criteria	Weights
Company Background, Qualifications, and Experience	40%
Staff Experience and Service	20%
Cost Schedule	30%
Compliance with Submittal Requirements	10%

After identification of Short-Listed Offerors, the Owner may or may not decide to invite Short-Listed firms to 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 Evaluation Criteria	Weights
Proposed Approach and Staff	65%
Price, Quality and Relevance of Interview as it Relates to the Scope of the RFP	35%

7.3 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.

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.

8 GENERAL CONDITIONS AND REQUIREMENTS

8.1 TERMS AND CONDITIONS

The contract award may have an initial term of three (3) years with two (2) one-year renewal options at the County’s discretion, pending annual budget approval.

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.

8.2 CONTRACTUAL OBLIGATIONS

The contents of this Proposal and the commitments set forth in the Proposal 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.

8.3 SUB-CONTRACTOR/PARTNER DISCLOSURE

A single Company may propose the entire solution. 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.

8.4 EXCEPTION TO THE RFP

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 RFP. All exceptions taken must be identified and explained in writing and must specifically reference the relevant section(s) of this RFP. 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 RFP. 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.

8.5 MODIFICATION OR WITHDRAWAL OF PROPOSAL

Prior to the scheduled closing time for receiving proposals, any Offeror 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.

8.6 EQUAL EMPLOYMENT OPPORTUNITY

All Firms 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.

8.7 MINORITY AND SMALL BUSINESS PARTICIPATION PLAN

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 as a 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.

8.8 LICENSES

The successful Firm(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.

8.9 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. Offeror/Firm shall ensure that Firm and any Subcontractor performing work under this contract: (i) uses E-Verify if required to do so; and (ii) otherwise complies with applicable law.

8.10 DRUG-FREE WORKPLACE

During the performance of this Request, the Firm 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 firm that the Firm 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 Contractor/Firm 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.

8.11 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.

A. WORKERS’ COMPENSATION

(for any agreement unless otherwise waived by the Risk Manager)

Statutory limits (where contractor has three or more employees) 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
 \$5,000 Medical Expense 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**
 (for any agreement providing professional services such as engineering, architecture, surveying, consulting services, etc.)
- \$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**
 (for any agreement involving the clean-up or transportation of pollutants)
- \$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)**
 (for any agreement involving software applications)
- \$1,000,000 Claims Made
- Contractor shall provide evidence of continuation or renewal of Technology Errors & Omissions Insurance for a period of two (2) years following termination of the Agreement.
- G. **Builder's Risk**
 (for any agreement involving above ground construction projects)
 Amount of Contract

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 to 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
 - Attn: 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.

8.12 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.

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9 APPENDIX A – COST FORM

RFP 2025-024 Landscape Restoration Services

Name of Company Submitting Proposal: _____

All shrubs, flowers, plantings, etc. shall be charged to Union County at cost. Contract must provide invoice of purchase to Union County for verification.

Proposal must include pricing for Landscaping and Miscellaneous as outlined below. Complete both sections below. Do not add additional information or include exceptions.

Landscaping	Estimated Quantities	Unit of Measure	Unit Price	Extension
Sod & Installation	2,500	SF		
Seeding/Mulching & Installation	10,000	SD		
Mobilization	50	EA	\$300.00	\$15,000.00

Miscellaneous	Unit of Measure	Price
Traffic Control	EA	
Select Material	TN	

10 APPENDIX B – PROPOSAL SUBMISSION FORM

RFP 2025-024 Landscape Restoration Services

This Proposal is submitted by:

Company Legal Name: _____

Representative Name: _____

Representative Signature: _____

Representative Title: _____

Address: _____

City/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-proposal this project. Proposal is valid for 120 calendar days from the Proposal due date and is submitted by an executive of the company that has authority to contract with Union County, NC.

Name: _____

Title: _____

Signature: _____

Date: _____

11 APPENDIX C – ADDENDUM AND ANTI-COLLUSION FORM

RFP 2025-024 Landscape Restoration Services

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 www.co.union.nc.us and/or www.ips.state.nc.us. It is your responsibility to check 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: _____

12 APPENDIX D – TEMPLATE CONTRACT

RFP 2025-024 Landscape Restoration Services

DO NOT SUBMIT WITH PROPOSAL

-Intentionally Left Blank-

SECTION A - COVER LETTER

Locust Property Management, LLC
2308 Unionville Indian Trail Rd West
Indian Trail, NC 28079
(704) 267-0367
locust1landscaping@gmail.com

Locust Property Management, LLC is pleased to submit this proposal in providing Land Restoration services for Union County, NC. With over 35 years of experience in land restoration and commercial property care, our company is committed to delivering detailed, professional results- particularly in restoring or enhancing land impacted by construction or other land disturbances. Locust Property Management, LLC is a North Carolina registered firm in good standing with the Secretary of State.

Our principal in charge with binding authority and single point of contact is:
Katina Livingston
Grounds Maintenance Director
(704) 267-0367
locust1landscaping@gmail.com

"The information contained in this SOQ 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 SOQ 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."

SECTION B - COMPANY AND QUALIFICATIONS

Locust Property Management, LLC brings over 35 years of experience in landscape restoration and grounds maintenance. Operating under its current organizational name and LLC structure, the company has provided services to a wide range of properties- from small residential to large-scale commercial grounds.

The company offers a variety of services through its dedicated divisions, including mowing, debris removal, lawn care, pest control and land restoration.

While operating independently, Locust Property Management has no parent companies, subsidiaries, or affiliates. The firm currently services county-level clients throughout North Carolina in the public sector.

The organizational structure includes Katina Livingston as Owner and Director of Grounds Maintenance, Whitney Mitchell as Operations Manager, and Timothy Livingston overseeing the Land Restoration division, which falls under the broader Grounds Maintenance department. Audited and verifiable financial statements are available upon request. The company is not involved in any pending litigation that would impact its ability to deliver or maintain its services. Recent client feedback highlights the company's strong attention to detail, customer satisfaction and thorough follow-through in both restoring and maintaining grounds, reflecting a high level of satisfaction with its performance.

SECTION C - PROJECT APPROACH

For land restoration services, Locust Property Management, LLC operates on a responsive, project-based work plan tailored to meet the needs of the County. Work Orders are scheduled as they are received, allowing for efficient task management and timely service.

A typical daily operating schedule includes preparing and completing seed and mulch repairs, as well as prepping sites for sod installation. This advance prep allows us to place sod orders for the following day or soon after, at which we return to the site to complete the sod restoration. We reserve four days per week specifically for land restoration work, but our team remains available 24 hours a day, 7 days a week for emergency repairs. Because we are committed to quality service, we carefully inspect sod conditions before installation; if weather has affected the quality of available materials, we will postpone the job to avoid using substandard products. In cases requiring multiple site visits, we communicate directly with the client on site to explain the restoration plan. Additionally, we leave customers with maintenance instructions to ensure the longevity and success of the restored landscape

To maintain clear communication with the County throughout the duration of each project, Locust Property Management ensures reliable contact via both email and telephone. Our team guarantees a response within 24 hours of any County inquiry or update request, ensuring that all parties remain informed and aligned.

For this contract, we plan to utilize a variety of specialized equipment essential for effective land restoration. This includes, but is not limited to, tillers, cultivators, cutters, trimmers, blowers, measuring tools and hand compactors. These tools allow us to restore grounds thoroughly and efficiently, returning them to their original condition.

SECTION D - REFERENCES

1. Union County Public Works
Union County, NC
Land Restoration
Richard Baker
Utility Service Manager
(704) 239-1461
Richard.Baker@unioncountync.gov
8 Yrs
2. Manna's Lawncare and Handy-Man Service
Charlotte, NC
Grounds Maintenance
Lawrenson Nicholas
(704) 904-2264
20 Yrs
3. New Beginnings Church
Matthews, NC
Seasonal Lawn Restoration
Monica Keys
(704) 567-2900
mkeys@nbccministries.org
25 Yrs

9 APPENDIX A – COST FORM

RFP 2025-024 Landscape Restoration Services

Name of Company Submitting Proposal: Locust Property Management, LLC

All shrubs, flowers, plantings, etc. shall be charged to Union County at cost. Contract must provide invoice of purchase to Union County for verification.

Proposal must include pricing for Landscaping and Miscellaneous as outlined below. Complete both sections below. Do not add additional information or include exceptions.

Landscaping	Estimated Quantities	Unit of Measure	Unit Price	Extension
Sod & Installation	2,500	SF	\$4.75	\$11,875
Seeding/Mulching & Installation	10,000	SD	\$2.25	\$22,500
Mobilization	50	EA	\$300.00	\$15,000.00

Miscellaneous	Unit of Measure	Price
Traffic Control	EA	\$225
Select Material	TN	\$195

[Handwritten Signature]
 Katina Livingston

10 APPENDIX B – PROPOSAL SUBMISSION FORM

RFP 2025-024 Landscape Restoration Services

This Proposal is submitted by:

Company Legal Name: Locust Property Management, LLC
Representative Name: Katina Livingston
Representative Signature: *Katina Livingston*
Representative Title: Owner
Address: 2308 Unionville Indian Trail Rd West
City/State/Zip: Indian Trail, NC 28079
Email Address: locust1landscaping@gmail.com
Phone Number: 704-267-0367
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-proposal this project. Proposal is valid for 120 calendar days from the Proposal due date and is submitted by an executive of the company that has authority to contract with Union County, NC.

Name: Katina Livingston
Title: Owner
Signature: *Katina Livingston*
Date: June 24, 2025

11 APPENDIX C – ADDENDUM AND ANTI-COLLUSION FORM

RFP 2025-024 Landscape Restoration Services

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 www.co.union.nc.us and/or www.ips.state.nc.us. It is your responsibility to check this information.

Addendum No.	Date Downloaded
N/A	N/A

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: Locust Property Management LLC
Name: Katina Livingston
Title: Owner
Email Address: locust7landscaping@gmail.com
Signature: 
Date: June 24, 2025



Union County, NC

Staff Report

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

File #: 25-578

Agenda Date: 10/6/2025

TITLE:

Public Health Clinical Service Fee Recommendations

INFORMATION CONTACT:

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

ACTION REQUESTED:

Review and approve requested fees to be added to the Human Services Agency's Department of Public Health Fee Schedule.

BACKGROUND:

In accordance with G.S. 130A-39(g), which allows local public health departments to implement fees for services rendered, the Union County Human Services Agency's Department of Public Health, with the approval of the Union County Consolidated Human Services Agency Board and the Board of County Commissioners, may implement specific fees for services. Medical clinic fees are established at the standard Medicaid rate plus 30%. Any fee without a standard Medicaid rate is established at the commercial rate plus 30%.

Approval to adopt fees the following CPT Code(s) is requested:

Local Use Tuberculosis Questionnaire (LUTBQ) - Tuberculosis Risk and Screening Questionnaire:
\$10.00

Fee for nurses' evaluation and screening of patients to certify the absence of tuberculosis risk or symptoms. Used when skin testing is deferred due to patients' positive test history or shortage of PPD solution. This is a new flat fee to be paid by patients. It is not a "sliding" fee.

88305 - Biopsy of tissue pathological examination: \$109.43

Laboratory examination of biopsied specimens to identify abnormal cellular changes including precancerous or cancerous lesions collected during colposcopy procedures. This is a new fee. The current Medicaid rate for this service is \$84.15.

J0561- Penicillin G benzathine, per 100,000 units, injection (Bicillin L-A): \$38.09

Intramuscular antibiotic injection for treatment of specified infections. This is an increase to an existing fee due to a change in the Medicaid rate. The current Medicaid rate for this service is \$29.30.

The Public Health Management team reviewed the fees and approved recommendation of this requested BOCC action at its September 3, 2025 meeting and the Consolidated Human Services Agency Board (CHSB) approved recommendation of this requested BOCC action at its September 8, 2025 meeting.

FINANCIAL IMPACT:

The revenue generated by the requested fee(s) will assist the Human Services Agency's Department of Public Health in covering associated clinical costs.

Union County Public Health Department Fee Requests

CPT Code	Program Description	Fee Slide Y or N	Recommended Fee By Department	Medicaid (MCD) Reimbursement	Commercial Reimbursement	Request	Explanation of the fee	Reason for Adjustment	Requested By	Effective Date	Financial Impact
LUTBQ- TB Risk & Screening Questionnaire	TB, IM	N	\$10.00	\$0.00	\$0.00	Request for new fee	Fee for nurses' evaluation and screening of patients to certify the absence of tuberculosis risk or symptoms. Used when skin testing is deferred due to patients' positive test history or shortage of PPD solution.	Union County Public Health is requesting to add this fee to the Public Health fee schedule.	Ashley Burts, Nursing Director	Upon Consolidated Human Service Board and BoCC Approval	The addition of this fee will help increase Public Health revenue and offset the cost of providing associated clinical services.
88305- Biopsy of tissue pathological examination	FP, MH, BC, AH	Y	\$109.43	\$84.18	\$107.83	Request for new fee	Laboratory examination of biopsied specimens to identify abnormal cellular changes including precancerous or cancerous lesions collected during colposcopy procedures.	Union County Public Health is requesting to add this fee to the Public Health fee schedule.	Ashley Burts, Nursing Director		
J0561- Penicillin G benzathine, per 100,000 units, injection (Bicillin L-A)	IM	Y	\$38.09	\$29.30	\$35.06	Request to increase current fee	Intramuscular antibiotic injection for treatment of specified infections.	Union County Public Health is requesting to increase the rate of this fee on our fee schedule due to an increase the NC Medicaid Reimbursement Rate	Ashley Burts, Nursing Director		

rev. 9/3/2025



Union County, NC

Staff Report

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

File #: 25-592

Agenda Date: 10/6/2025

TITLE:

Budget Amendment - Social Services Emergency Placement Funds

INFORMATION CONTACT:

Ashley Lantz, Human Services Agency - Social Services, Director, 704-296-4380

ACTION REQUESTED:

1) Recognize, receive, and appropriate \$13,457 in additional funding from the NCDHHS Division of Social Services and 2) approve Budget Amendment #7.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

To help address ongoing challenges in securing treatment placements for children in DSS custody with complex behavioral health needs, NCDHHS DSS reallocated \$1,237,010 in unused Emergency Placement Funds associated with the behavioral health investment from the 2023 Appropriations Act to the DSS Emergency Placement Fund.

Each county will receive a base amount of \$10,000 and the remainder of the funds will be allocated based on each county's percentage of the foster care census. Union County will receive \$13,457. If county expenditures exceed the county's allocation, any excess payments will be county funded.

Emergency Placement Funds are intended to temporarily assist county departments of social services in addressing identified placement needs for children in the custody of the agencies who are awaiting a Medicaid leveled treatment placement. While children await the location of the placement, these funds can be used to prevent them from staying in a DSS office and enable local agencies to temporarily provide and arrange for essential needs of the individual to establish or maintain a placement.

Funds may be used only for youth opened for 109 Foster Care Case Management Services on a DSS-5027 or in the Child Welfare Information System to cover client specific costs claimed for purposes of the following:

- 1) Maintaining a crisis placement through a contract that pays a retainer to an identified placement provider who will accept a temporary emergency placement until the appropriate behavioral health treatment placement is located.
- 2) Paying a short-term temporary enhanced rate to an identified placement provider who is currently or will provide care and supervision to youth who have behaviors that require an exceptional level of supervision. For children who are awaiting a Medicaid leveled treatment

placement, these funds can be used to pay for a placement that will aid in meeting the child's immediate needs. The amount above the board rate will be reimbursed by submitting the DSS -1571 Part II.

- 3) Another local solution approved by DHHS as an Approved Alternative Option, that prevents a child in DSS custody from spending a night in the DSS office while waiting on the appropriate treatment placement as approved by NCDSS.

The Emergency Placement Funds are available for use immediately, and no prior approval is required except for purposes associated with a local alternative solution.

FINANCIAL IMPACT:

\$13,457 is allocated to the County with no additional County match required. If County expenditures exceed the allocation, any excess expenses / payments will be County funded.

BUDGET AMENDMENT

BUDGET General Funds REQUESTED BY Mary Chickoree

FISCAL YEAR FY 2026 DATE _____

INCREASE

Description

State Grant 13,457
 Public Assistance 13,457

DECREASE

Description

Explanation: DSS will be receiving some unused State funds for Child Welfare. The purpose is to assist in securing temporary treatment placement for children in DSS custody who have complex behavioral needs. NC DHHHS DSS has allocated funding from the 2023 Appropriations Act.

DATE _____

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

FOR POSTING PURPOSES ONLY

DEBIT

<u>Code</u>	<u>Account</u>	<u>Amount</u>
10130623-5399-19004	Public Assistance	13,457
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
	Total	13,457

CREDIT

<u>Code</u>	<u>Account</u>	
10130623-4405	State Grant	13,457
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
	Total	13,457

Prepared By MG
 Posted By _____
 Date _____

Number 7



Union County, NC

Staff Report

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

File #: 25-608

Agenda Date: 10/6/2025

TITLE:

Contract - Language Interpretation and Translation Services

INFORMATION CONTACT:

Jackie Morgan, Human Services Agency - Business Operations, Director, 704-296-4825

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Procurement Department partnered with Human Services to issue Request for Proposals 2025-021 Language Interpretation and Translation Services. The translation services will be utilized by both the Health and Social Services Divisions of Human Services. Previously, each division had its own separate agreement. On April 29, 2025, twenty-eight proposals were received and reviewed by an evaluation team in accordance with applicable evaluation criteria for this project. The top ranked four firms/vendors were invited to shortlist interview/presentations. As a result, the team requests approval to enter into a contract with the top scoring/ranked preferred offeror, MasterWord Services Inc., to provide language interpreting and translation services.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$200,000. Since this contract contains a two-year initial term with three one-year renewal options, a total of \$1,000,000 is estimated to be spent. Funding is available in the adopted FY26 budget with future expenditures subject to annual BOCC budget appropriation.

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 MASTERWORD SERVICES, INC., a Texas corporation authorized to do business in the State of North Carolina, whose address is 303 Stafford Street, Houston, TX 77079 hereinafter “Contractor.”

W I T N E S S E T H

WHEREAS, Union desires that Contractor perform certain language interpreting 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 Exhibit A, Union’s RFP #2025-021, “Language Interpretation and Translation Services, which Exhibit A 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 in accordance with the attached Exhibit B, 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 two (2) years (the “Initial Term”). Upon completion of the Initial Term, Union may, in its sole discretion, elect to renew this Agreement for up to three (3) additional one-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 and all attachments hereto (excepting Exhibit B), 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. To the extent consistent with the Public Records Act, Union shall maintain the confidentiality of Exhibit B. If a request is made to view Exhibit B, Union will notify Contractor of the request and of the date that such Exhibit B will be released to the requester unless Contractor

obtains a court order enjoining that disclosure. If Contractor fails to obtain the court order enjoining disclosure, Union will release the requested information on the date specified.

5. INSURANCE. The attached Attachment A to the Contract Addendum 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. CONTRACT ADDENDUM. The attached Contract Addendum at its associated attachments are incorporated herein by reference.

20. 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.

21. 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

MASTERWORD SERVICES, INC.

By: _____ (SEAL)

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

Approved as to Legal Form: CAM

Deputy Finance Officer

Exhibit A



Request for Proposal No. 2025-021

Language Interpretation and Translation Services

Due Date: April 29, 2025
Time: 10:00 AM Local Time
Submittal Location: Electronic Submission (Refer to Section 2.2)

Non-Mandatory Pre-Submittal Conference

Date: April 11, 2025
Time: 10:00 AM Local Time
Location: Virtual Meeting (Refer to Section 2.3)

Procurement Contact:

Vicky Watts, CLGPO
Senior Procurement Specialist
704.283.3601
vicky.watts@unioncountync.gov

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1 NOTICE OF ADVERTISEMENT

Union County, North Carolina Request for Proposals No. 2025-021 Language Interpretation and Translation Services

Electronic proposals will be received by the Union County's Procurement Department at the Union County Government Center, 500 North Main Street, Monroe, NC 28112 until **10:00 AM Local Time on April 29, 2025.**

Union County, North Carolina, through Human Services Business Operations, is seeking proposals from qualified vendors to provide language interpretation and translation services.

This solicitation follows the Uniform Administrative Requirements (UG), Cost Principals, and Audit Requirements for Federal awards (2 C.F.R. Part 200). Contracts resulting from this solicitation may be funded with federal grant funds which have been procured in a manner that is in compliance with all applicable Federal laws, policies, and standards as well as state law and local policies.

The solicitation may be examined at the Union County Government Center, Procurement and Contract Management Department, 500 North Main Street, Suite 709, Monroe, NC 28112, Monday through Friday between the hours of 8:00 am and 5:00 pm. Copies of the solicitation may be obtained from the locations listed below:

1. Download the Solicitation 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 eVP website:
<https://evp.nc.gov/solicitations/> (Search County of Union)

A Non-Mandatory, Virtual Pre-Proposal Conference will be held on **April 11, 2025 at 10:00 AM Local Time.** Representatives from Union County 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 RFP Documents are to be submitted in writing to the Procurement Representative listed on the cover page (vicky.watts@unioncountync.gov) no later than **April 15, 2025 at 3:00 PM Local Time.**

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 also reserves the right to award to multiple vendors. Service Providers 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.

-End of Advertisement-

2 SUBMITTAL DETAILS

2.1 PROPOSAL SUBMISSION DEADLINE

All Proposals are to be received electronically by the Union County Procurement Department no later than **April 29, 2025 at 10:00 AM Local Time**, per the instructions below. Any proposals 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>. The proposal must be signed by a person who is authorized to bind the proposing Company. Instructions for preparing the proposal are provided herein.

Select the solicitation drop down arrow and choose this RFP from the list. Complete the form, upload your proposal as one (1) complete document, and select submit. The maximum accepted size is 30 MB. A delivery notification email, from LF-Forms@co.union.nc.us, will be sent as your confirmation of receipt.

Paper submissions and/or email submissions 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 VIRTUAL NON-MANDATORY PRE-PROPOSAL CONFERENCE

A virtual Non-Mandatory Pre-Proposal Conference will be held on **April 11, 2025 at 10:00 AM Local Time** at the link below. Representatives from Union County will be on-hand to give a brief overview of the project and to answer questions. Although attendance at this meeting is not mandatory, it is strongly encouraged.

Microsoft Teams

[Join the meeting now](#)

Meeting ID: 256 320 205 657

Passcode: gD7Qe75q

2.4 PROPOSAL QUESTIONS

Proposal questions will be due on or before **April 15, 2025 at 3:00 PM Local Time**. The primary purpose of this is to provide participating vendors with the opportunity to ask questions, in writing, related to the RFP.

Submit questions by email to Vicky Watts at vicky.watts@unioncountync.gov by the deadline shown above. The email should identify the proposal number and title. All questions and answers may be posted as addenda on the Union County Website or the State of North Carolina eVP Website as indicated on the advertisement page.

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 INTRODUCTION

3.1 COUNTY

The County (estimated population 257,682) 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 NOTICE OF FEDERAL FUNDING

This solicitation follows the Uniform Administrative Requirements (UG), Cost Principles, and Audit Requirements for Federal awards (2 C.F.R. Part 200). Contracts resulting from this solicitation may be funded with federal grant funds which have been procured in a manner that is in compliance with all applicable Federal laws, policies, and standards as well as state law and local policies.

3.3 PURPOSE

Union County is seeking proposals from interested and qualified vendors to provide Over-the-Phone (OPI), Video Remote Interpretation (VRI) and written translation services for foreign language interpretation. These services are needed in order to ensure that the Department's limited English proficient customers are able to obtain access to available programs and benefits without barriers. The successful Vendor will demonstrate the capacity to provide foreign language interpretation and translation services using qualified personnel in the target languages identified within the applicable time constraints.

4 SCOPE OF WORK

This solicitation will consist of performing all work, and providing all labor, materials, tools, equipment and transportation necessary to provide Over the Phone interpretation (OPI) and Video Remote Interpretation (VRI) in the target languages, including American Sign Language (ASL)

through any and all requested phases of a claimant's interaction with Union County. In some cases, associated document translation may also be requested. OPI, VRI and written translation services will be utilized strictly on an as-needed basis, with no minimum amount of work guaranteed under any contract resulting from this RFP.

1. Language interpretation and associated document translation should be conducted so as to faithfully and accurately convey the meaning of the source language. Interpretations should reflect the style, register and cultural context of the source message without omissions, additions or embellishments.
2. Vendor must be able to provide (at a minimum) OPI, VRI and Document Translation Services for all languages/dialects listed in Section 11, Appendix D – Language Requirements and VRI for American Sign Language (ASL).
3. Only proposals from companies established in the foreign language interpretation business and qualified to handle accounts of this size will be considered. Three (3) years minimum experience is required. Prior to award, Union County reserves the right to investigate a Vendor's ability to fulfill the requirements of the contract.

4.1 CONFIDENTIALITY STATEMENT

Vendor must possess a signed and dated Confidentiality Statement for each interpreter, either employed or contracted, prior to that interpreter providing service under the Contract. Provide a sample copy of your Vendor's Confidentiality Statement with proposal.

4.2 INTERPRETER OPERATIONAL REQUIREMENTS

1. The interpreter will remain neutral in the conversation unless prompted by the customer with additional instructions.
2. The interpreter will speak in the first (1st) person.
3. The interpreter will use the utmost courtesy when conversing with the customer and/or the client.
4. The interpreter will refrain from entering into a disagreement with the customer and/or the client.
5. The interpreter will accurately interpret the client's statements and relay the message in its entirety with the meaning preserved throughout the conversation. Information will not be edited or deleted, which may erroneously change the meaning the of the client's statements.
6. All conversations, interpretations, or translations will remain confidential and will not be shared with individuals unrelated to the call or translation. Calls must only be recorded for Quality Assurance and training purposes.
7. The translator will provide accurate (reflect the meaning correctly), effective (provide the intended effect on the reader), and impartial (unbiased) services.

4.3 OVER-THE-PHONE INTERPRETATION (OPI) SERVICES

OPI services must meet and/or exceed the following requirements.

- Regularly and continuously engaged in the business of providing multilingual Over-the-Phone Interpretation (OPI) services for at least three years.
- Have a language proficiency certification procedure in place to verify competency as a condition of employment as an interpreter.
- Possess all permits, licenses and professional credentials necessary to supply product and perform services as specified under this RFP.
- Capable of providing the County instant access to an interpreter. Connection time is not to exceed 10 seconds for Spanish and not to exceed 15 seconds for all languages.
- Have capability of providing at a minimum the languages outlined in Section 11, Appendix D – Language Requirements.
- Maintain Interpretation services capability 24 hours per day, seven days per week.
- Maintain an adequate number of available interpreters in the most often accessed languages to maintain minimum connection time requirements.
- Provide a live operator option.
- Have an established telephone redundancy system to ensure the County’s residents and employees receive uninterrupted services in case of system or power failure.
- Provide complete transition and training services to County at no additional cost.
- Work with the County to identify and/or modify equipment required to deliver multilingual interpretation services efficiently and effectively at no additional charge.

4.4 VIDEO REMOTE INTERPRETING (VRI) SERVICES

In addition all languages/dialects listed in Section 11, Appendix D – Language Requirements, the Vendor must provide video conferencing technology to connect a deaf or hard-of-hearing person with an American Sign Language (ASL) interpreter remotely, facilitating communication.

VRI must provide real-time, full-motion video and audio over a dedicated high-speed, wide-bandwidth video connection or wireless connection that delivers high-quality video images that do not produce lags, choppy, blurry, or grainy images, or irregular pauses in communication. VRI must provide sharply delineated image that is large enough to display the interpreter’s face, arms, hands, and fingers, and the participating individual’s face, arms, hands, and fingers, regardless of body position. VRI must also provide a clear, audible transmission of voices.

4.4.1 EQUIPMENT

1. Contractor must provide all necessary equipment and software required. Union County requests the option to purchase software license, if needed.
2. Contractor must have all necessary equipment installed and functioning to provide the services required in the resulting contract.
3. Contractor must have telephone terminal equipment with expansion capabilities to accommodate an increase in call volume, as needed.
4. Adequate training to users of the technology and other involved individuals so that they may quickly and efficiently set up and operate the VRI.
5. Contractor's telephone terminal and VRI equipment must be capable of collecting the detailed call traffic information needed to produce the reports and invoice details required by the contract.
6. Outbound calls and/or third-party calls will be required of the Vendors under the resulting Master Agreement. Vendors shall not charge for these calls.
7. Contractor agrees that no interpretation work by wireless communication device shall take place in a moving vehicle if the interpreter is the driver. This strict prohibition is intended to avoid driver distractions, accidents, risks to others, and lack of interpreter focus on the interpretation work itself. In addition, background noise such as traffic, barking dogs, crying babies, wind, and other people carrying on nearby conversations is a distraction to others on the phone and interpretation work should not proceed when any participant cannot hear due to the background noise and requests the interpreter to relocate to a quiet area. Subject to contract cancelation and other penalties, any interpretation conducted on a wireless device, whether texting or oral, is prohibited under this contract if conducted in a moving vehicle when the interpreter is the driver. To be clear, this prohibition shall also apply in states with laws addressing cell phone use and/or texting while driving and applies to all drivers involved with manually or orally typing; or entering multiple letters, numbers, symbols or other text in a wireless communication device; or sending or reading data in the device, for the purpose of oral or non-voice interpersonal communication, including texting, emailing, and instant messaging. Vehicles equipped with Bluetooth devices and dash mounted phones are not an exception to this prohibition. Interpreters must not be driving in a moving vehicle when conducting interpretations.

4.5 WRITTEN TRANSLATION SERVICES

These services include but not limited to the following:

- Provide written translation services (from English to another language or vice versa).
- Translation services shall be provided at the Contractor's work site or in other locations as mutually agreed.
- Provide document translations for use in an electronic format.

- Work with the County to maintain accurate documentation of English and second language translations in an archive format.
- Transfer translations electronically in a secure format.
- Contractor shall be able to provide translation of documents and other written materials within one (1) to four (4) days (96 hours) after receiving a request from Union County.

4.6 DELIVERABLES AND REPORTS

Contractor shall submit, at no additional cost, monthly reports of services rendered. **The County prefers an online method for reports.** These reports must include, but not be limited to:

4.6.1 CALL DETAIL – INTERPRETATION SERVICE

- Language requested
- Caller contact information (including, but not limited to, Access Code, Personal Code, such as a phone extension or a worker number, or other identifying code, if available, and department or agency requesting such service)
- Date and Time of the Call
- Call Start and End Time
- Connection Time to Interpreter
- Interpreter Number
- Rate Code or Rate
- Minutes Per Call
- Total Charge per Call

4.6.2 MONTHLY CALL SUMMARY REPORT – USAGE BY LANGUAGE

- Language requested
- Total Minutes Per Language
- Total Calls Per Language
- Average Length of Call Per Language
- Percentage of Total Minutes Per Language
- Average Interpreter Connect Time (seconds) per Language
- Total Charge Per Language

4.6.3 MONTHLY CALL SUMMARY REPORT – USAGE BY DEPARTMENT

- Total Calls per Department
- Percentage of Calls per Department
- Details of Languages Requested per Department
- Percentage of Language Usage per Department
- Percentage of Total Minutes per Department
- Percentage of Total Charges per Department

4.6.4 WRITTEN TRANSLATION DETAIL

- Language requested
- County contact information (including, but not limited to, Access Code, Personal Code, such as a phone extension or a worker number, or other identifying code, if available, and department or agency requesting such service)

- Date and Time of Request
- Translation Personnel
- Rate
- Number of Words Translated
- Total Charge

In addition to the standard reports described above, Contractor agrees to provide ad hoc reports upon request.

4.7 INVOICING

1. Contractor must only invoice for the time that interpreter service is provided. Time required establishing the language service needed and/or connection time to the appropriate interpreter will not be chargeable. Billing of the interpretation period starts when the interpreter answers and begins interpreting. The interpretation period is ended when the interpreter has been disconnected from both the customer and the client.
2. Invoices will be prepared at the end of every calendar month and delivered to the customer no later than the 15th day of the calendar month immediately following the month under invoice.
3. Interpreter Services: Invoices will reflect billing increments of one-tenth of one minute. For any period of time which falls between tenths of a minute, Contractor will round up to the next tenth of a minute. One-tenth of one minute is defined as six seconds.
4. Written Translation Services: Invoices will reflect per word billing increments.
5. The minimum billable charge shall be equal to a one minute charge at the rate of the language for which interpreter service is provided.
6. Invoices must contain the following information, either within the invoice or as an attachment to the invoice, at a minimum:
 - a. Union County Contract number;
 - b. Date of invoice;
 - c. Contractor name and address;
 - d. Customer account number and Department name/program;
 - e. Billing period;
 - f. Interpreting modality (OPI, VRI, or Document Translation);
 - g. Interpreter's name or other identifying information/number;
 - h. Date and time of each interpreter or translation service occurrence provided;
 - i. Interpreted language associated with the call or translation;
 - j. Duration of the interpreter service provided, measured in tenth of a minute increment;
 - k. Contract rate per minute for interpretation and per word for translation;
 - l. Interpreter Connection Time;
 - m. Total number of calls interpreted, or documents translated;

- n. Total number of billable interpretation minutes or words translated;
- o. Total number of “no interpreter available” calls;
- p. Percentage of calls connected in 30 seconds or less;
- q. Total number of calls resulting in interpreter connection times of greater than 60 seconds;
- r. Total number of dropped calls between the time the call is answered by an automated attendant or live operator and the time an interpreter is online;
- s. Total dollar amount due; and
- t. Any applicable prompt payment discount(s) available.

4.8 CUSTOMER SUPPORT

1. Contractor must provide toll-free access to interpreter services from anywhere in the United States, 365-days a year, 7-days a week, 24-hours a day.
2. Provide point of contact for customer service;
3. Provide procedures for after-hours support; and
4. Describe the process for addressing issues including problem reporting, assignments, escalation, and resolution.

4.9 INSTRUCTIONAL MATERIALS

1. Contractor must provide instructional materials at no additional charge to assist end users in accessing the services that will be provided under the Contract. Materials should include language identification materials such as “I Speak” cards and procedural information for accessing the services.
2. Instructional materials must also include informational language posters for the public indicating interpretation and translation services are available and free of charge. The informational language posters for the public must include (at minimum) the most frequent languages utilized by each Participating State to be identified in each state’s Participating Addendum.
3. Sample informational posters must be provided to customers for approval and possible editing free of charge in order to suit local languages/needs.
4. Instructional materials must be readily available to all customers, at no cost, throughout the term of the Contract.

4.10 CUSTOMER SATISFACTION SURVEY

Service Providers shall include a sample of any Customer Satisfaction Surveys they currently do for other existing customers, and show us how their follow-up corrective action mechanism works for any issues identified in the course of these Surveys.

4.11 SERVICE PROVIDER'S FINANCIAL INFORMATION

The Service Provider must have the following financial information readily available and have the ability to provide it to the County, without exception, within twenty-four (24) hours upon request during the proposal evaluation 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 Service Provider (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 Service Provider's financial position or ability to provide services to the County.

5 DETAILED SUBMITTAL REQUIREMENTS AND INSTRUCTIONS

5.1 TERMS OF SUBMISSION

All material received from a person or company ("Respondent") in response to this solicitation shall become the property of Union County and will not be returned to the Respondent. Any and all costs incurred by a Respondent in preparing, submitting, or presenting submissions are the Respondent's sole responsibility and Union County shall not reimburse the Respondent. 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 Respondent 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 Respondent 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. Respondent 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 Respondent's materials which was properly labeled by the Respondent as a trade secret, Union County will notify the Respondent of the request and the date that such materials will be released to the requestor unless the Respondent obtains a court order enjoining that disclosure. If the Respondent fails to obtain the court order enjoining disclosure prior to that date, Respondent understands and agrees that Union County will release the requested information to the requestor on that date.

Furthermore, the Respondent 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 Respondent.

5.2 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 Offeror'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 Section 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.

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.

Proposals must not exceed 25 pages, 8 1/2" x 11" with one (1) inch margins typed with Arial or Times New Roman font, and text size minimum of eleven (11) points. All proposals must include titles that correspond with the bolded sections and subsections to which the information pertains. *Charts and screenshots are not restricted to formatting requirements; however, please use your judgment for decipherability.*

The RFP should include a response to each of the following criteria. **Failure to address each area could result in rejection of a proposal.** Please provide a table of contents in the format of the proposal requirements identifying each section and subsection. Include examples of procedures, reports, or other information where applicable.

The proposal should be organized and identified by sections using labeled titles:

- **Section A** – Cover Letter
- **Section B** – Company and Qualifications
- **Section C** – Description of Proposed Services
- **Section D** – Key Staff
- **Section E** – Implementation Plan and Schedule
- **Section F** – Credentials
- **Section G** – References
- **Section H** – Required Forms

Omissions and incomplete answers may be deemed unresponsive.

5.2.1 SECTION A – COVER LETTER

The cover letter shall briefly introduce your firm, principal in charge, and area(s) of experience in which your firm is seeking consideration. Also, include the following:

- Expression of firm's interest in the work.
- Statement of whether firm is on register with the Secretary of State.
- Legal company name and DBA (if applicable).

- Corporate headquarters' address, phone number and Website address.
- Location Providing Service (if different from headquarters), address and telephone number.
- Required: Name of single point of contact, title, direct telephone number and/or extension and direct email address.
- Name of person with binding authority, title, address, direct telephone number and/or extension and email address.
- Make the following representations and warranty in the cover letter, the falsity of which might result in rejection of its Statement of Qualifications:
 "The information contained in this SOQ 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 SOQ 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."

5.2.2 SECTION B – COMPANY AND QUALIFICATIONS

This section provides each company with the opportunity to demonstrate how its history, organization, and partnerships differentiate it from other companies. Careful attention should be paid to providing information relevant to Union County's needs.

- Provide company history, and number of years in business under the current organizational name, structure and services offered.
- Describe your company's complete corporate structure, including any parent companies, subsidiaries, affiliates and other related entities.
- How many public sector (cities and counties) clients does your company have?
- Provide a management organization chart of your company including director and officer positions and names and the reporting structure.
- Explain how your organization ensures the personnel performing the services are qualified and proficient.
- Detailed description of efforts your firm will undertake to achieve client satisfaction and to satisfy the requirements of the solicitation.
- List any projects or services terminated by a government entity. Please disclose the government entity that terminated and explain the reason for the termination.
- Are audited or otherwise verifiable financial statements available upon request?
- Is the Vendor's organization involved in any pending litigation that may affect its ability to provide its proposed solution or ongoing maintenance or support of its products and services.
- Detailed 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 herein.

5.2.3 SECTION C – DESCRIPTION OF PROPOSED SERVICES

Describe in detail how the overall services for Over-the-Phone, Video Remote Interpreting, and Written Translation will meet or exceed each requirement as outlined in the Scope of Services. At a minimum, the following must be included:

- Explain any special resources, procedures, or approaches that make the services of Vendor responsive to meeting the minimum qualifications and requirements of the RFP particularly advantageous to the County.
- Identify any limitations or restrictions of Bidder in providing the services that the County should be aware of in evaluating its Response to this RFP.
- Provide sample of current confidentiality statement currently utilized. (Section 4.1)
- Describe in detail the equipment and software that will be utilized for this service. (Section 4.4.1)
- Provide a sample report of services rendered. (Section 4.6)
- Describe customer support services. (Section 4.8)
- Describe available instructional materials. (Section 4.9)
- Provide sample of a customer satisfaction survey. (Section 4.9)

5.2.4 SECTION D – KEY STAFF

- Provide a list of staff, including job title and years of employment, who will perform the work on this project and indicate the functions that each will perform.
- Include educations background and related experience on similar projects.

5.2.5 SECTION E – IMPLEMENTATION PLAN AND SCHEDULE

The Implementation Plan and Schedule should provide a clear picture of what the County can expect, and when to expect it, upon execution of a contract.

5.2.6 SECTION F – CREDENTIALS

Provide proof of any permits, licenses, and/or professional credentials necessary to perform services as specified in this RFP.

5.2.7 SECTION G – REFERENCES

List three (5) client references with which you have had contracts currently or within the past three (3) years for this service. Please provide the following for each client:

- Name of Company/Government Entity
- Address
- Project Name
- Contact Name and Title
- Phone Number
- Email Address
- Length of Service

5.2.8 SECTION H – REQUIRED FORMS

Offerors must include signed copies of the following documents in this section:

- Appendix A – Cost Proposal
- Appendix B – Proposal Submission Form (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. Union County reserves the right to conduct interviews with a shortlist of selected Offerors. Failure to abide by this requirement shall be grounds for disqualification from this selection process.
3. The Owner will establish an RFP Evaluation Team to review and evaluate the RFPs. The RFP Evaluation Team will evaluate the RFPs independently in accordance with the published evaluation criteria. Union County reserves the right to conduct interviews with a shortlist of selected respondents.
4. At its sole discretion, the Owner may ask written questions of Offerors, seek written clarification, and conduct discussions with Offerors on the RFPs.
5. 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 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 Owner will consider the information submitted in the RFP as well as the meetings (if applicable) with the 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 Evaluation Criteria	Weights
Company Background and Experience	35%
Proposed Services and Implementation	40%
Compliance with Submittal Requirements	15%
Price Proposal	10%

After identification of Short-Listed Offerors, the Owner may or may not decide to invite Short-Listed firms to 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 Evaluation Criteria	Weights
Proposed Approach, Implementation and Staff	65%
Cost, Quality and Relevance of Interview as it Relates to the Scope of the RFP	35%

6.3 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.

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.

7 GENERAL CONDITIONS AND REQUIREMENTS

7.1 TERMS AND CONDITIONS

The contract award may have an initial term of two (2) years with three (3) one-year renewal options at the County’s discretion, pending annual budget approval.

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 Proposal 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.

7.3 COST ADJUSTMENTS

The Unit Pricing for the Initial Term shall be based upon the response to this solicitation. However, the Unit Pricing for any Renewal Term may be adjusted at the beginning of such Renewal Term by multiplying the Unit Pricing effective in the previous term by the quotient of the All Urban Consumers Price Index (CPI-U) (South Region), Others Goods and Services, with the Index Period of 2025-2030 as published by the Bureau of Labor Statistics, United States Department of Labor, in effect ninety (90) days prior to the commencement date of the new Renewal Term divided by such CPI in effect for the same month one (1) year prior to such date. However, any Unit Pricing increase pursuant to the previous sentence shall be capped at a five percent (5%) increase from one term to the next. Any such Unit Pricing adjustment for a Renewal Term must be requested by the Vendor or County within thirty (30) days from the date of the County's notice of its exercise of an option to renew the Contract for a Renewal Term.

7.4 SUB-CONTRACTOR/PARTNER DISCLOSURE

A single Company may propose the entire solution. 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.

7.5 EXCEPTION TO THE RFP

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 RFP. All exceptions taken must be identified and explained in writing and must specifically reference the relevant section(s) of this RFP. 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 RFP. 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.

7.6 MODIFICATION OR WITHDRAWAL OF PROPOSAL

Prior to the scheduled closing time for receiving proposals, any Offeror may withdraw their proposal. After the scheduled closing time for receiving proposals, no proposal may be withdrawn for 120 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.

7.7 EQUAL EMPLOYMENT OPPORTUNITY

All Firms 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.

7.8 MINORITY AND SMALL BUSINESS PARTICIPATION PLAN

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.

7.9 LICENSES

The successful Firm(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.

7.10 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. Offeror/Firm shall ensure that Firm and any Subcontractor performing work under this contract: (i) uses E-Verify if required to do so; and (ii) otherwise complies with applicable law.

7.11 DRUG-FREE WORKPLACE

During the performance of this Request, the Firm 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 firm that the Firm 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 Contractor/Firm 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.

7.12 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.

- A. WORKERS’ COMPENSATION
(for any agreement unless otherwise waived by the Risk Manager)

Statutory limits (where contractor has three or more employees) 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
\$5,000 Medical Expense 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
(for any agreement providing professional service such as engineering, architecture, surveying, consulting services, etc.)

\$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
(for any agreement involving the clean-up or transportation of pollutants)

\$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)
(for any agreement involving software applications)

\$1,000,000 Claims Made

Contractor shall provide evidence of continuation or renewal of Technology Errors & Omissions Insurance for a period of two (2) years following termination of the Agreement.

G. Builder's Risk
(for any agreement involving above ground construction projects)

Amount of Contract

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
500 N. 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.

7.13 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.

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8 APPENDIX A – COST PROPOSAL

RFP 2025-021 Language Interpretation and Translation Services

SUBMIT WITH PROPOSAL

Company Name: _____

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. Refer to Section 7 Evaluation Criteria and Selection Process.

Please complete the following price proposal form in its entirety as specified. No minimum quantities are guaranteed. Do not write in exceptions. All exceptions should be submitted on or before the question deadline of April 15, 2025 at 3:00 PM local time.

Description	Spanish	Russian	Ukrainian	Portuguese	American Sign Language
Over the Phone Interpretation (Per Minute)	\$	\$	\$	\$	n/a
Video Remote Interpretation (Per Minute)	\$	\$	\$	\$	\$
Written Interpretation (Per Word)	\$	\$	\$	\$	n/a

If there are additional costs that may be charged, please specify in the space below:

Description	Cost
Software License Purchase	

9 APPENDIX B – PROPOSAL SUBMISSION FORM

RFP 2025-021 Uniform Rental Services

SUBMIT WITH PROPOSAL

This Proposal is submitted by:

Company Legal Name: _____

Representative Name: _____

Representative Signature: _____

Representative Title: _____

Address: _____

City/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 resubmit this project. Proposal is valid for 120 calendar days from the Proposal due date and is submitted by an executive of the company that has authority to contract with Union County, NC.

Name: _____

Title: _____

Signature: _____

Date: _____

10 APPENDIX C – ADDENDUM AND ANTI-COLLUSION FORM

RFP 2025-021 Uniform Rental Service

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 www.co.union.nc.us and/or www.ips.state.nc.us. 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 – LANGUAGE REQUIREMENTS

RFP 2025-021 Uniform Rental Service

DO NOT SUBMIT WITH PROPOSAL

Afrikaans	Gaddang	Luxembourgeois	Samoan
Akan	Gaelic	Maay	Sango
Albanian	Garre	Macedonian	Serbian
Amharic	Georgian	Malagasy	Shanghainese
Arabic	German	Malay	Sichuan
Armenian	Greek	Malayalam	Sicilian
Ashante	Gujarati	Malinka	Sindhi
Assyrian	Haitian Creole	Maltese	Sinhalese
Azerbaijani	Hakka	Mam	
Azeri	Hakka - China	Mandarin	Slovak
Bajuni	Hassaniyya	Mandingo	Slovenian
Bambara	Hebrew	Mandinka	Somali
Basque	Hindi	Maninka	Soninke
Behdini	Hmong	Marshallese	Soprani
Belarussian	Hokkien	Mien	Sorani
Bengali	Hudanese	Mina	Spanish
Bosnian	Hungarian	Mirpuri	Sudanese
Bulgarian	Ibanag	Mixteco	Sudanese Arabic
Burmese	Ibo	Moldavian	Susu
Cantonese	Icelandic	Mongolian	Swahili
Catalan	Igbo	Montenegrin	Swedish
Chaldean	Ilocano	Moroccan-Arabic	Sylhetti
Chaochow	Indonesian	Navajo	Tagalog
Chavacano	Inuktitut	Neapolitan	Taiwanese
Cherokee	Italian	Nepali	Tajik
Chin	Jakartanese	Nigerian Pidgeon English	Tamil
Chuukese	Japanese	Norwegian	Telugu
Cree	Javanese	Nuer	Thai
Croatian	Kanjobal	Oromo	Tibetan
Czech	Karen	Pahari	Tigre
Danish	Kasmiri	Pampangan	Tigrinya
Dari	Kazakh	Pangasinan	Toishanese
Dinka	Khmer (Cambodian)	Pashto	Tongan
Diula	Kinyarwanda	Patois	Tshiluba
Dutch	Kirghiz	Pidgin English	Turkish
Estonian	Kirundi	Polish	Twi
Ewe	Korean	Portugese Creole	Ukranian
Farsi (Persian)	Kosovan	Portuguese	Urdu
Fijian Hindi	Krio	Pothwari	Uyghur
Finnish	Kurdish	Pulaar	Uzbek
Flemish	Kurmanji	Punjabi	Vietnamese
French	Laotian	Putian	Visayan
French Canadian	Latvian	Quichua	Wenzhou
Fukienese	Lingala		Wolof
Fula	Lithuanian	Romani, Vlach	Yiddish
i	Luganda	Romanian	Yoruba
Fuzhou	Luo	Russian	Yupik

EXHIBIT B

8 APPENDIX A – COST PROPOSAL

RFP 2025-021 Language Interpretation and Translation Services

SUBMIT WITH PROPOSAL

Company Name: MasterWord Services, Inc.

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. Refer to Section 7 Evaluation Criteria and Selection Process.

Please complete the following price proposal form in its entirety as specified. No minimum quantities are guaranteed. Do not write in exceptions. All exceptions should be submitted on or before the question deadline of April 15, 2025 at 3:00 PM local time.

Description	Spanish	Russian	Ukrainian	Portuguese	American Sign Language
Over the Phone Interpretation (Per Minute)	\$ 0.98	\$ 1.17	\$ 1.17	\$ 1.17	n/a
Video Remote Interpretation (Per Minute)	\$ 1.58	\$ 1.64	\$ 1.64	\$ 1.64	\$ 2.05*
Written Interpretation (Per Word)	\$ 0.137	\$ 0.137	\$ 0.175	\$ 0.175	n/a

If there are additional costs that may be charged, please specify in the space below:

Description	Cost
Software License Purchase	Waived
OPI/VRI: Calls are billed per minute; fractions of a minute will be rounded to the next whole minute. Billing starts when interpreter answers and ends once interpreter or customer disconnects.	
Specialized Services to be quoted upon request: Specialized services include, but are not limited to; legal interpreters and other services requiring subject-matter expertise. These services shall be scheduled in advance to ensure interpreter availability. *Does not include CDI services.	
Spanish and ASL VRI calls are available on-demand 24/7/365. Other languages On-Demand VRI services are available Monday through Friday between 7:00 am and 7:00 pm CST.	
Translation: A 50% Rush fees may apply if Client requests a service to be performed on an urgent basis. Project Management is charged at 10% of the total service order charged.	
Translation Minimums: A minimum charge (cost per order) of \$50 shall apply to each translation order.	

Additional Terms of Services apply to the rates above. All other languages will be quoted upon request.

EXHIBIT C

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

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.

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: Human Services
Contract #: 9838
- 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.

CONTRACT ADDENDUM

This Addendum shall modify and supersede as indicated certain terms and provisions of the agreement between UNION COUNTY (the “County”) and MASTERWORD SERVICES, INC. (“Contractor”), dated _____ for the provision of language interpreting services by Contractor (the “Agreement”). References to the “Parties” shall hereinafter refer to the County and the Contractor collectively. When used in the Attachments listed below, the terms “County,” “Contractor,” and “Parties” shall have the same meanings as set forth in this Addendum.

This Addendum is included in compliance with 9 N.C.A.C. 3M.0703 and contract procedures developed by the North Carolina Division of Social Services. In the event of any inconsistencies between the terms and provisions appearing in the Agreement and those appearing in this Addendum (including any attachment thereto), then this Addendum and its attachments shall be controlling. It is the intent of the parties that except as amended by this Addendum, which shall be attached to the referenced Agreement, the terms and provisions of the Agreement shall govern the relationship between the parties.

1. Contract Documents. The Agreement shall consist of the following documents, which are attached and incorporated herein by reference:

- The Agreement and any exhibits or attachments identified therein.
- This Addendum
- Attachment A: General Terms and Conditions
- Attachment C: Combined Federal Certification Regarding Drug-Free Workplace Requirements and Certification Regarding Nondiscrimination
- Attachment D: Conflict of Interest Policy
- Attachment E: No Overdue Taxes
- Attachment I: HIPAA Business Associate Addendum
- Attachment J: Certification Regarding Transportation
- Attachment K: IRS Federal Tax Exemption
- Attachment M: Contractor’s Tax ID Number
- Attachment N: State Certification: Contractor Certifications Required by North Carolina Law
- Attachment O: Non-Discrimination, Clean Air, Clean Water

These documents constitute the entire agreement between the Parties and supersede all prior oral and/or written statements or agreements. If there are subsequent contract amendments, the most recent amendment shall have the highest precedence and the oldest amendment shall have the lowest precedence.

- 2. Contractor’s Tax ID No.:** See Attachment M.
- 3. Contractor’s Fiscal Year End Date:** December 31
- 4. Contractor’s Status:** Public Private for Profit Private Nonprofit

5. **Contract Administrators:** All notices permitted or required to be given by one party to the other and all questions about the contract from one party to the other shall be addressed and delivered to the other party's Contract Administrator. The name, post office address, street address, telephone number, fax number, and email address of the parties' respective initial Contract Administrators are set out below. Either party may change the name, post office address, street address, telephone number, fax number, or email address of its Contract Administrator by giving timely written notice to the other party.

For the County:

IF DELIVERED BY US POSTAL SERVICE		IF DELIVERED BY ANY OTHER MEANS	
Name & Title	Ashley Lantz Division Director, Social	Name & Title	Jackie Morgan Business Operations Department Director
Services		County	Union County Consolidated
County	Union County Consolidated	Human	
Mailing Address	Services Agency 2330 Concord Ave	Mailing Address	Services Agency 2330 Concord Ave
City, State, Zip	Monroe, NC 28110	City, State, Zip	Monroe, NC 28110
Telephone	704-296-4825		
Fax	704-296-6151		
Email	Jackie.morgan@unioncountync.gov		

For the Contractor:

IF DELIVERED BY US POSTAL SERVICE		IF DELIVERED BY ANY OTHER MEANS	
Name & Title	Ludmila Golovine CEO	Name & Title	Ludmila Golovine CEO
Company Name	MasterWord Services Inc.	Company Name	MasterWord Services, Inc.
Mailing Address	303 Stafford St.	Street Address	303 Stafford St.
City State Zip	Houston, TX 77079	City State Zip	Houston, TX 77079
Telephone	281-589-0810		
Fax			
Email	contracts@masterword.com		

6. **Maximum Contract Amount and Funding Source(s):**

The total amount paid by the County to the Contractor under this contract shall not exceed 200,000.00. This amount consists of:

- Federal funds. Amount, or percentage, & CFDA# if known: 49%
- State funds. Amount, or percentage, if known: 30%
- County funds. Amount, or percentage, if known: 21%
- Other: _____ . Amount, or percentage, if known: _____

Matching Requirements from Contractor:

- There are no matching requirements from the Contractor.

7. **Unit Pricing.** For purposes of this Agreement, a unit or unit of service, is defined as: See Agreement. Total number of units contracted for: See Agreement. Price per unit: See Agreement.
8. **Applicable SIS Code(s):** N/A
9. **Service Area/Delivery Site.** Contractor shall provide the services described in this Agreement to the following areas and/or at the following location(s): See Agreement.
10. **Reporting Requirements:** Contractor shall comply with audit requirements as described in N.C.G.S. § 143C-6-22 & 23 and OMB Circular- CFR Title 2 Grants and Agreements, Part 200, and shall disclose all information required by 42 USC 455.104, or 42 USC 455.105, or 42 USC 455.106.
11. **Access to Persons and Records.** The State Auditor shall have access to persons and records as a result of all contracts or grants entered into by State agencies or political subdivisions in accordance with N.C.G.S. § 147-64.7. Additionally, as the State funding authority, the Department of Health and Human Services shall have access to persons and records as a result of all contracts or grants entered into by State agencies or political subdivisions. All Contractor's records related to this Agreement shall be open to inspection and copying by the County. Contractor shall provide such records to the County within fifteen (15) days of the County's request to inspect and/or copy. Contractor agrees to participate in program, fiscal and administrative monitoring or audits, making records and staff time available to federal, State and County staff. Contractor agrees to take necessary steps for corrective action, as negotiated within a corrective action plan, for any items found to be out of compliance with Federal and State laws, regulations, standards and/or terms of this contract.
12. **Supplementation of Expenditure of Public Funds.** Contractor assures that funds received pursuant to this contract shall be used only to supplement, not to supplant, the total amount of federal, state and local public funds that Contractor otherwise expends for contract services and related programs. Funds received under this Agreement shall be used to provide additional public funding for such services; the funds shall not be used to reduce Contractor's total expenditure of other public funds for such services.
13. **Disbursements.** As a condition of this Agreement, Contractor acknowledges and agrees to make disbursements in accordance with the following requirements:

- (a) Implement adequate internal controls over disbursements;
- (b) Pre-audit all vouchers presented for payment to determine:
 - Validity and accuracy of payment
 - Payment due date
 - Adequacy of documentation supporting payment
 - Legality of disbursement
- (c) Assure adequate control of signature stamps/plates;
- (d) Assure adequate control of negotiable instruments; and
- (e) Implement procedures to insure that account balance is solvent and reconcile the account monthly.

- 14. **Outsourcing to Other Countries.** Contractor certifies that it has identified to the County all jobs related to the Agreement that have been outsourced to other countries, if any. Contractor further agrees that it will not outsource any such jobs during the term of this Agreement without providing notice to the County.
- 15. **Signature Warranty.** The undersigned represent and warrant that they are authorized to bind their principals to the terms of this Agreement.
- 16. **Federal Certifications.** Individuals and Organizations receiving federal funds must ensure compliance with certain certifications required by federal laws and regulations. Contractor is hereby complying with Certifications regarding Nondiscrimination, Drug-Free Workplace Requirements, Environmental Tobacco Smoke, Debarment, Suspension, Ineligibility and Voluntary Exclusion Lower Tier Covered Transactions, and Lobbying. These assurances and certifications are to be signed by Contractor's authorized representative.
- 17. **Reversion of Funds.** Any unexpended grant funds shall revert to the County upon termination of the Agreement.

IN WITNESS WHEREOF, the parties hereto, acting under authority of their respective governing bodies, have caused this Addendum to be duly executed, this day and year first above written. The undersigned represent and warrant that they are authorized to bind their principals to the terms of this agreement. The Contractor and the County have executed the Contract and this Addendum in duplicate originals, with one original being retained by each party.

MASTERWORD SERVICES, INC.

(Printed/Typed Name and Title)

DATE: _____

UNION COUNTY

Brian Matthews, County Manager

DATE: _____

Approved as to Legal Form CAM

Attachment A
General Terms and Conditions

Relationships of the Parties

Indemnity and Insurance

Independent Contractor: The Contractor is and shall be deemed to be an independent contractor in the performance of this contract and as such shall be wholly responsible for the work to be performed and for the supervision of its employees. The Contractor represents that it has, or shall secure at its own expense, all personnel required in performing the services under this agreement. Such employees shall not be employees of, or have any individual contractual relationship with the County.

Subcontracting: The Contractor shall not subcontract any of the work contemplated under this contract without prior written approval from the County. Any approved subcontract shall be subject to all conditions of this contract. Only the subcontractors specified in the contract documents are to be considered approved upon award of the contract. The County shall not be obligated to pay for any work performed by any unapproved subcontractor. The Contractor shall be responsible for the performance of all of its subcontractors.

Assignment: No assignment of the Contractor's obligations or the Contractor's right to receive payment hereunder shall be permitted. However, upon written request approved by the issuing purchasing authority, the County may:

- (a) Forward the Contractor's payment check(s) directly to any person or entity designated by the Contractor, or
- (b) Include any person or entity designated by Contractor as a joint payee on the Contractor's payment check(s).

In no event shall such approval and action obligate the County to anyone other than the Contractor and the Contractor shall remain responsible for fulfillment of all contract obligations.

Beneficiaries: Except as herein specifically provided otherwise, this contract shall inure to the benefit of and be binding upon the parties hereto and their respective successors. It is expressly understood and agreed that the enforcement of the terms and conditions of this contract, and all rights of action relating to such enforcement, shall be strictly reserved to the County and the named Contractor. Nothing contained in this document shall give or allow any claim or right of action whatsoever by any other third person. It is the express intention of the County and Contractor that any such person or entity, other than the County or the Contractor, receiving services or benefits under this contract shall be deemed an incidental beneficiary only.

Indemnification: Contractor agrees to protect, defend, indemnify and hold the 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. Without limiting the generality of the foregoing, the Contractor also agrees to indemnify and hold harmless the County and any of their officers, agents and employees, from any claims of third parties arising out of or any act or omission of the Contractor in connection with the performance of this contract. 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.

Insurance: During the term of the contract, the Contractor at its sole cost and expense shall provide commercial insurance of such type and with such terms and limits as may be reasonably associated with the contract. At a minimum, the Contractor shall procure and maintain the following coverage and limits with insurers rated A-VII or better by A.M. Best, or as otherwise authorized by the Union County Risk Manager.:

- (a) **Worker's Compensation** - The contractor shall provide and maintain Worker's Compensation Insurance as required by the laws of North Carolina, as well as employer's liability coverage, with minimum limits of \$500,000 Each Accident, \$500,000 Disease-Each Employee, and \$500,000 Disease – Policy Limit, covering all of Contractor's employees who are engaged in any work under the contract. If any work is sublet, the Contractor shall require the subcontractor to provide the same coverage for any of his employees engaged in any work under the contract.
- (b) **Commercial General Liability** – General Liability Coverage on a Comprehensive Broad Form 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(Defense cost shall be in excess of the limit of liability.)

- (c) **Professional Liability** – \$1,000,000 Per occurrence. Contractor shall provide evidence of continuation or renewal of Professional Liability Insurance for a period of two (2) years following termination of the Agreement.
- (d) The insurance coverage minimums specified in subparagraph (a), (b), and (c) are exclusive of defense costs.
- (e) The Contractor understands and agrees that the insurance coverage minimums specified in subparagraph (a), (b), and (c) are not limits, or caps, on the Contractor's liability or obligations under this contract.
- (f) The Contractor may obtain a waiver of any one or more of the requirements in subparagraph (a), (b), and (c) by demonstrating that it has insurance that provides protection that is equal to or greater than the coverage and limits specified in subparagraph (a), (b), and (c). The County Risk Manager shall be the sole judge of whether such a waiver should be granted.
- (g) The Contractor may obtain a waiver of any one or more of the requirements in subparagraph (a), (b), and (c) by demonstrating that it is self-insured and that its self-insurance provides protection that is equal to or greater than the coverage and limits specified in subparagraph (a), (b), and (c). The County Risk Manager shall be the sole judge of whether such a waiver should be granted.
- (h) Providing and maintaining the types and amounts of insurance or self-insurance specified in this paragraph is a material obligation of the Contractor and is of the essence of this contract.
- (i) The Contractor shall only obtain insurance from companies that are authorized to provide such coverage and that are authorized by the Commissioner of Insurance to do business in the State of North Carolina. All such insurance shall meet all laws of the State of North Carolina.
- (j) The Contractor shall comply at all times with all lawful terms and conditions of its insurance policies and all lawful requirements of its insurer.
- (k) The Contractor shall require its subcontractors to comply with the requirements of this paragraph.
- (l) Before commencement of any work or event, Contractor shall provide a certificate of insurance in satisfactory form as evidence of the insurances required above.
- (m) 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.
Policy endorsement for Additional Insured Status shall be provided to Certificate Holder within sixty (60) days of inception of contract.
- (n) Contractor shall have no right of recovery or subrogation against Union County (Including its officers, agents and employees).
- (o) 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.
- (p) 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.
- (q) Notwithstanding the notification requirements of the Insurer, Contractor hereby agrees to notify Union 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 County, in its sole discretion, may deem failure to provide such notice as a breach of this Agreement.
- (r) 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.
- (s) Certificate Holder shall be listed as follows:
Union County
Attn.: Risk Manager
500 North Main Street, Suite #130
Monroe, NC 28112
- (t) 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 insurance coverage and provision of certificate(s) of insurance and additional insured endorsement(s), in proper form prior to commencement of services.
- (v) The Certificate of Insurance should note in the Description of Operations the following:
Department: CHSA
Contract: 9838

Transportation of Clients by Contractor: The contractor will maintain Insurance requirements if required as noted under Article 7 Rule R2-36 of the North Carolina Utilities Commission.

Default and Termination

Termination Without Cause: The County may terminate this contract without cause by giving 30 days written notice to the Contractor.

Termination for Cause: If, through any cause, the Contractor shall fail to fulfill its obligations under this contract in a timely and proper manner, the County shall

Intellectual Property Rights

have the right to terminate this contract by giving written notice to the Contractor and specifying the effective date thereof. In that event, all finished or unfinished deliverable items prepared by the Contractor under this contract shall, at the option of the County, become its property and the Contractor shall be entitled to receive just and equitable compensation for any satisfactory work completed on such materials, minus any payment or compensation previously made. Notwithstanding the foregoing provision, the Contractor shall not be relieved of liability to the County for damages sustained by the County by virtue of the Contractor's breach of this agreement, and the County may withhold any payment due the Contractor for the purpose of setoff until such time as the exact amount of damages due the County from such breach can be determined. In case of default by the Contractor, without limiting any other remedies for breach available to it, the County may procure the contract services from other sources and hold the Contractor responsible for any excess cost occasioned thereby. The filing of a petition for bankruptcy by the Contractor shall be an act of default under this contract.

Waiver of Default: Waiver by the County of any default or breach in compliance with the terms of this contract by the Provider shall not be deemed a waiver of any subsequent default or breach and shall not be construed to be modification of the terms of this contract unless stated to be such in writing, signed by an authorized representative of the County and the Contractor and attached to the contract.

Availability of Funds: The parties to this contract agree and understand that the payment of the sums specified in this contract is dependent and contingent upon and subject to the appropriation, allocation, and availability of funds for this purpose to the County. All payments shall be conditioned upon appropriation by the Union County Board of Commissioners of sufficient funds for each request for services.

Force Majeure: Neither party shall be deemed to be in default of its obligations hereunder if and so long as it is prevented from performing such obligations by any act of war, hostile foreign action, nuclear explosion, riot, strikes, civil insurrection, earthquake, hurricane, tornado, or other catastrophic natural event or act of God.

Survival of Promises: All promises, requirements, terms, conditions, provisions, representations, guarantees, and warranties contained herein shall survive the contract expiration or termination date unless specifically provided otherwise herein, or unless superseded by applicable Federal or State statutes of limitation.

Copyrights and Ownership of Deliverables: All deliverable items produced pursuant to this contract are the exclusive property of the County. The Contractor shall not assert a claim of copyright or other property interest in such deliverables.

Federal Intellectual Property Bankruptcy Protection Act: The Parties agree that the County shall be entitled to all rights and benefits of the Federal Intellectual Property Bankruptcy Protection Act, Public Law 100-506, codified at 11 U.S.C. 365 (n) and any amendments thereto.

Compliance with Applicable Laws

Compliance with Laws: The Contractor shall comply with all laws, ordinances, codes, rules, regulations, and licensing requirements that are applicable to the conduct of its business, including those of federal, state, and local agencies having jurisdiction and/or authority.

Title VI, Civil Rights Compliance: In accordance with Federal law and U.S. Department of Agriculture (USDA) and U.S. Department of Health and Human Services (HHS) policy, this institution is prohibited from discriminating on the basis of race, color, national origin, sex, age or disability. Under the Food Stamp Act and USDA policy, discrimination is prohibited also on the basis of religion or political beliefs.

Equal Employment Opportunity: The Contractor shall comply with all federal and State laws relating to equal employment opportunity.

Health Insurance Portability and Accountability Act (HIPAA): The Contractor agrees that, if the County determines that some or all of the activities within the scope of this contract are subject to the Health Insurance Portability and Accountability Act of 1996, P.L. 104-91, as amended ("HIPAA"), or its implementing regulations, it will comply with the HIPAA requirements and will execute such agreements and practices as the County may require to ensure compliance.

(a) **Data Security:** The Contractor shall adopt and apply data security standards and procedures that comply with all applicable federal, state, and local laws, regulations, and rules.

(b) **Duty to Report:** The Contractor shall report a suspected or confirmed security breach to the local Department of Social Services/Human Services Contract Administrator within twenty-four (24) hours after the breach is first discovered, provided that the Contractor shall report a breach involving Social Security Administration data or Internal Revenue Service

data within one (1) hour after the breach is first discovered.

- (c) **Cost Borne by Contractor:** If any applicable federal, state, or local law, regulation, or rule requires the Contractor to give written notice of a security breach to affected persons, the Contractor shall bear the cost of the notice.

Trafficking Victims Protection Act of 2000: The Contractor will comply with the requirements of Section 106(g) of the Trafficking Victims Protection Act of 2000, as amended (22 U.S.C. 7104).

Executive Order # 24: It is unlawful for any vendor, contractor, subcontractor or supplier of the state to make gifts or to give favors to any state employee. For additional information regarding the specific requirements and exemptions, contractors are encouraged to review Executive Order 24 and G.S. Sec. 133-32.

Confidentiality

Confidentiality: Any information, data, instruments, documents, studies or reports given to or prepared or assembled by the Contractor under this agreement shall be kept as confidential and not divulged or made available to any individual or organization without the prior written approval of the County. The Contractor acknowledges that in receiving, storing, processing or otherwise dealing with any confidential information it will safeguard and not further disclose the information except as otherwise provided in this contract.

Oversight

Access to Persons and Records: The State Auditor shall have access to persons and records as a result of all contracts or grants entered into by State agencies or political subdivisions in accordance with General Statute 147-64.7. Additionally, as the State funding authority, the Department of Health and Human Services shall have access to persons and records as a result of all contracts or grants entered into by State agencies or political subdivisions. All Contractor's records related to this contract shall be open to inspection and copying by the County. Contractor shall provide such records to the County within fifteen (15) days of the County's request to inspect and/or copy.

Record Retention: Records shall not be destroyed, purged or disposed of without the express written consent of the County. State basic records retention policy requires all grant records to be retained for a minimum of five years or until all audit exceptions have been resolved, whichever is longer. If the contract is subject to federal policy and regulations, record retention

may be longer than five years since records must be retained for a period of three years following submission of the final Federal Financial Status Report, if applicable, or three years following the submission of a revised final Federal Financial Status Report. Also, if any litigation, claim, negotiation, audit, disallowance action, or other action involving this Contract has been started before expiration of the five-year retention period described above, the records must be retained until completion of the action and resolution of all issues which arise from it, or until the end of the regular five-year period described above, whichever is later. Records for Temporary Assistance for Needy Families (TANF) and Medicaid and Medical Assistance grants and programs must be retained for a minimum of ten years.

Warranties and Certifications

Date and Time Warranty: The Contractor warrants that the product(s) and service(s) furnished pursuant to this contract ("product" includes, without limitation, any piece of equipment, hardware, firmware, middleware, custom or commercial software, or internal components, subroutines, and interfaces therein) that perform any date and/or time data recognition function, calculation, or sequencing will support a four digit year format and will provide accurate date/time data and leap year calculations. This warranty shall survive the termination or expiration of this contract.

Certification Regarding Collection of Taxes: G.S. 143-59.1 bars the Secretary of Administration from entering into contracts with vendors that meet one of the conditions of G.S. 105-164.8(b) and yet refuse to collect use taxes on sales of tangible personal property to purchasers in North Carolina. The conditions include: (a) maintenance of a retail establishment or office; (b) presence of representatives in the State that solicit sales or transact business on behalf of the vendor; and (c) systematic exploitation of the market by media-assisted, media-facilitated, or media-solicited means. The Contractor certifies that it and all of its affiliates (if any) collect all required taxes.

E-Verify

Pursuant to G.S. 143-48.5 and G.S. 147-33.95(g), the undersigned hereby certifies that the Contractor named below, and the Contractor's subcontractors, complies with the requirements of Article 2 of Chapter 64 of the NC General Statutes, including the requirement for each employer with more than 25 employees in North Carolina to verify the work authorization of its employees through the federal E-Verify system. E-Verify System Link: www.uscis.gov

Miscellaneous

Choice of Law: The validity of this contract and any of its terms or provisions, as well as the rights and duties of the parties to this contract, are governed by the laws of North Carolina. The Contractor, by signing this contract, agrees and submits, solely for matters concerning this Contract, to the exclusive jurisdiction of the courts of North Carolina and agrees, solely for such purpose, that the exclusive venue for any legal proceedings shall be the county in which the contract originated. The place of this contract and all transactions and agreements relating to it, and their situs and forum, shall be the county where the contract originated, where all matters, whether sounding in contract or tort, relating to the validity, construction, interpretation, and enforcement shall be determined.

Amendment: This contract may not be amended orally or by performance. Any amendment must be made in written form and executed by duly authorized representatives of the County and the Contractor.

Severability: In the event that a court of competent jurisdiction holds that a provision or requirement of this contract violates any applicable law, each such provision or requirement shall continue to be enforced to the extent it is not in violation of law or is not otherwise unenforceable and all other provisions and requirements of this contract shall remain in full force and effect.

Headings: The Section and Paragraph headings in these General Terms and Conditions are not material parts of the agreement and should not be used to construe the meaning thereof.

Time of the Essence: Time is of the essence in the performance of this contract.

Key Personnel: The Contractor shall not replace any of the key personnel assigned to the performance of this contract without the prior written approval of the County. The term "key personnel" includes any and all persons identified as such in the contract documents and any other persons subsequently identified as key personnel by the written agreement of the parties.

Care of Property: The Contractor agrees that it shall be responsible for the proper custody and care of any property furnished to it for use in connection with the performance of this contract and will reimburse the County for loss of, or damage to, such property. At the termination of this contract, the Contractor shall contact the County for instructions as to the disposition of such property and shall comply with these instructions.

Travel Expenses: Reimbursement to the Contractor for travel mileage, meals, lodging and other travel expenses incurred in the performance of this contract shall not exceed the rates established in County policy.

Sales/Use Tax Refunds: If eligible, the Contractor and all subcontractors shall: (a) ask the North Carolina Department of Revenue for a refund of all sales and use taxes paid by them in the performance of this contract, pursuant to G.S. 105-164.14; and (b) exclude all refundable sales and use taxes from all reportable expenditures before the expenses are entered in their reimbursement reports.

Advertising: The Contractor shall not use the award of this contract as a part of any news release or commercial advertising.

Attachment C

FEDERAL CERTIFICATIONS

The undersigned states that:

- 1. He or she is the duly authorized representative of the Contractor named below;
- 2. He or she is authorized to make, and does hereby make, the following certifications on behalf of the Contractor, as set out herein:
 - a. The Certification Regarding Nondiscrimination;
 - b. The Certification Regarding Drug-Free Workplace Requirements;
 - c. The Certification Regarding Environmental Tobacco Smoke;
 - d. The Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion Lower Tier Covered Transactions; and
 - e. The Certification Regarding Lobbying;
- 3. He or she has completed the Certification Regarding Drug-Free Workplace Requirements by providing the addresses at which the contract work will be performed;
- 4. [Check the applicable statement]
 - [] He or she **has completed** the attached **Disclosure Of Lobbying Activities** because the Contractor **has made, or has an agreement to make**, a payment to a lobbying entity for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action;

OR

- [] He or she **has not completed** the attached **Disclosure Of Lobbying Activities** because the Contractor **has not made, and has no agreement to make**, any payment to any lobbying entity for influencing or attempting to influence any officer or employee of any agency, any Member of Congress, any officer or employee of Congress, or any employee of a Member of Congress in connection with a covered Federal action.

- 5. The Contractor shall require its subcontractors, if any, to make the same certifications and disclosure.

Signature	Title
------------------	--------------

<u>MasterWord Services, Inc.</u>	
Contractor Name	Date

[This Certification Must be Signed by the Same Individual Who Signed the Proposal Execution Page]

I. Certification Regarding Nondiscrimination

The Contractor certifies that it will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §§3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (h)

the Food Stamp Act and USDA policy, which prohibit discrimination on the basis of religion and political beliefs; and (i) the requirements of any other nondiscrimination statutes which may apply to this Agreement.

II. Certification Regarding Drug-Free Workplace Requirements

1. The Contractor certifies that it will provide a drug-free workplace by:
 - a. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the Contractor's workplace and specifying the actions that will be taken against employees for violation of such prohibition;
 - b. Establishing a drug-free awareness program to inform employees about:
 - i. The dangers of drug abuse in the workplace;
 - ii. The Contractor's policy of maintaining a drug-free workplace;
 - iii. Any available drug counseling, rehabilitation, and employee assistance programs; and
 - iv. The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
 - c. Making it a requirement that each employee be engaged in the performance of the agreement be given a copy of the statement required by paragraph (a);
 - d. Notifying the employee in the statement required by paragraph (a) that, as a condition of employment under the agreement, the employee will:
 - i. Abide by the terms of the statement; and
 - ii. Notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five days after such conviction;
 - e. Notifying the Department within ten days after receiving notice under subparagraph (d)(ii) from an employee or otherwise receiving actual notice of such conviction;
 - f. Taking one of the following actions, within 30 days of receiving notice under subparagraph (d)(ii), with respect to any employee who is so convicted:
 - i. Taking appropriate personnel action against such an employee, up to and including termination; or
 - ii. Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency; and
 - g. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs (a), (b), (c), (d), (e), and (f).
2. The sites for the performance of work done in connection with the specific agreement are listed below (list all sites; add additional pages if necessary):

3. Contractor will inform the Department of any additional sites for performance of work under this agreement.
4. False certification or violation of the certification may be grounds for suspension of payment, suspension or termination of grants, or government-wide Federal suspension or debarment. 45 C.F.R. 82.510.

III. Certification Regarding Environmental Tobacco Smoke

Public Law 103-227, Part C-Environmental Tobacco Smoke, also known as the Pro-Children Act of 1994 (Act), requires that smoking not be permitted in any portion of any indoor facility owned or leased or contracted for by an entity and used routinely or regularly for the provision of health, day care, education, or library services to children under the age of 18, if the services are funded by Federal programs either directly or through State or local governments, by Federal grant, contract, loan, or loan guarantee. The law does not apply to children's services provided in private residences, facilities funded solely by Medicare or Medicaid funds, and portions of facilities used for inpatient drug or alcohol treatment. Failure to comply with the provisions of the law may result in the imposition of a civil monetary penalty of up to \$1,000.00 per day and/or the imposition of an administrative compliance order on the responsible entity.

The Contractor certifies that it will comply with the requirements of the Act. The Contractor further agrees that it will require the language of this certification be included in any subawards that contain provisions for children's services and that all subgrantees shall certify accordingly.

IV. Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion Lower Tier Covered Transactions

Instructions

[The phrase "prospective lower tier participant" means the Contractor.]

1. By signing and submitting this document, the prospective lower tier participant is providing the certification set out below.
2. The certification in this clause is a material representation of the fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originate may pursue available remedies, including suspension and/or debarment.
3. The prospective lower tier participant will provide immediate written notice to the person to whom this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
4. The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participant," "person," "primary covered transaction," "principal," "proposal," and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and Coverage sections of rules implementing Executive Order 12549, 45 CFR Part 76. You may contact the person to whom this proposal is submitted for assistance in obtaining a copy of those regulations.
5. The prospective lower tier participant agrees by submitting this proposal that, should the proposed covered transaction be entered into, it shall not knowingly enter any lower tier covered transaction with a person who is debarred, suspended, determined ineligible or voluntarily excluded from participation in this covered transaction unless authorized by the department or agency with which this transaction originated.
6. The prospective lower tier participant further agrees by submitting this document that it will include the clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion--Lower Tier Covered Transaction," without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended, ineligible, or voluntarily excluded from covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the Nonprocurement List.
8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
9. Except for transactions authorized in paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal

Government, the department or agency with which this transaction originated may pursue available remedies, including suspension, and/or debarment.

Certification

1. **The prospective lower tier participant certifies**, by submission of this document, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
2. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

V. Certification Regarding Lobbying

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

1. No Federal appropriated funds have been paid or will be paid by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federally funded contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form SF-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award document for subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) who receive federal funds of \$100,000.00 or more and that all subrecipients shall certify and disclose accordingly.
4. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000.00 and not more than \$100,000.00 for each such failure.

VI. Disclosure Of Lobbying Activities

Instructions

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

Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.

1. Identify the status of the covered Federal action.
2. Identify the appropriate classification of this report. If this is a follow-up report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.

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

Public reporting burden for this collection of information is estimated to average 30 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046), Washington, D. C. 20503

Disclosure Of Lobbying Activities

(Approved by OMB 0344-0046)

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

<p>1. Type of Federal Action:</p> <p><input type="checkbox"/> a. contract</p> <p><input type="checkbox"/> b. grant</p> <p><input type="checkbox"/> c. cooperative agreement</p> <p><input type="checkbox"/> d. loan</p> <p><input type="checkbox"/> e. loan guarantee</p> <p><input type="checkbox"/> f. loan insurance</p>	<p>2. Status of Federal Action:</p> <p><input type="checkbox"/> a. Bid/offer/application</p> <p><input type="checkbox"/> b. Initial Award</p> <p><input type="checkbox"/> c. Post-Award</p>	<p>3. Report Type:</p> <p><input type="checkbox"/> a. initial filing</p> <p><input type="checkbox"/> b. material change</p> <p>For Material Change Only:</p> <p>Year _____ Quarter _____</p> <p>Date Of Last Report: _____</p>
<p>4. Name and Address of Reporting Entity:</p> <p><input type="checkbox"/> Prime</p> <p><input type="checkbox"/> Subawardee Tier (if known) _____</p> <p>Congressional District (if known) _____</p>	<p>5. If Reporting Entity in No. 4 is Subawardee, Enter Name and Address of Prime:</p> <p>Congressional District (if known) _____</p>	
<p>6. Federal Department/Agency:</p>	<p>7. Federal Program Name/Description:</p> <p>CFDA Number (if applicable) _____</p>	
<p>8. Federal Action Number (if known)</p>	<p>9. Award Amount (if known) \$</p>	
<p>10. a. Name and Address of Lobbying Entity (if individual, last name, first name, MI):</p> <p>(attach Continuation Sheet(s) SF-LLL-A, if necessary)</p>	<p>b. Individuals Performing Services (including address if different from No. 10a.) (last name, first name, MI):</p> <p>(attach Continuation Sheet(s) SF-LLL-A, if necessary)</p>	
<p>11. Amount of Payment (check all that apply):</p> <p>\$ _____ <input type="checkbox"/> actual <input type="checkbox"/> planned</p>	<p>13. Type of Payment (check all that apply):</p> <p><input type="checkbox"/> a. retainer</p> <p><input type="checkbox"/> b. one-time fee</p> <p><input type="checkbox"/> c. commission</p> <p><input type="checkbox"/> d. contingent fee</p> <p><input type="checkbox"/> e. deferred</p> <p><input type="checkbox"/> f. other; specify: _____</p>	
<p>12. Form of Payment (check all that apply):</p> <p><input type="checkbox"/> a. cash</p> <p><input type="checkbox"/> b. In-kind; specify: Nature _____ Value _____</p>		
<p>14. Brief Description of Services Performed or to be Performed and Date(s) of Services, including officer(s), employee(s), or Member(s) contacted, for Payment Indicated in Item 11(attach Continuation Sheet(s) SF-LLL-A, if necessary):</p>		
<p>15. Continuation Sheet(s) SF-LLL-A attached: <input type="checkbox"/> Yes <input type="checkbox"/> No</p>		
<p>16. Information requested through this form is authorized by title 31 U. S. C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U. S. C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.</p>	<p>Signature: _____</p> <p>Print Name: _____</p> <p>Title: _____</p> <p>Telephone No: _____ Date: _____</p>	
<p>Federal Use Only</p>		<p>Authorized for Local Reproduction Standard Form - LLL</p>

ATTACHMENT D

CONFLICT OF INTEREST ACKNOWLEDGEMENT AND POLICY

State of _____

County _____

I, _____, Notary Public for said County and State, certify that
_____ personally appeared before me this day and acknowledged
that he/she is _____ of MasterWord Services, Inc. and by that authority
duly given and as the act of the Organization, affirmed that the foregoing Conflict of Interest Policy was
adopted by the Board of Directors/Trustees or other governing body in a meeting held on the ____ day of
_____, _____.

Sworn to and subscribed before me this _____ day of _____, _____.

(Official Seal)

Notary Public

My Commission expires _____, 20 ____

.....
INSTRUCTIONS FOR ORGANIZATION:

Sign and attach the following pages after adopted by the Board of Directors/Trustees or other governing body OR replace the following with the current adopted conflict of interest policy.

MasterWord Services, Inc
Name of Organization

Signature of Organization Official

Conflict of Interest Policy Example

The Board of Directors/Trustees or other governing persons, officers, employees or agents are to avoid any conflict of interest, even the appearance of a conflict of interest. The Organization's Board of Directors/Trustees or other governing body, officers, staff and agents are obligated to always act in the best interest of the organization. This obligation requires that any Board member or other governing person, officer, employee or agent, in the performance of Organization duties, seek only the furtherance of the Organization mission. At all times, Board members or other governing persons, officers, employees or agents, are prohibited from using their job title, the Organization's name or property, for private profit or benefit.

A. The Board members or other governing persons, officers, employees, or agents of the Organization should neither solicit nor accept gratuities, favors, or anything of monetary value from current or potential contractors/vendors, persons receiving benefits from the Organization or persons who may benefit from the actions of any Board member or other governing person, officer, employee or agent. This is not intended to preclude bona-fide Organization fund raising-activities.

B. A Board or other governing body member may, with the approval of Board or other governing body, receive honoraria for lectures and other such activities while not acting in any official capacity for the Organization. Officers may, with the approval of the Board or other governing body, receive honoraria for lectures and other such activities while on personal days, compensatory time, annual leave, or leave without pay. Employees may, with the prior written approval of their supervisor, receive honoraria for lectures and other such activities while on personal days, compensatory time, annual leave, or leave without pay. If a Board or other governing body member, officer, employee or agent is acting in any official capacity, honoraria received in connection with activities relating to the Organization are to be paid to the Organization.

C. No Board member or other governing person, officer, employee, or agent of the Organization shall participate in the selection, award, or administration of a purchase or contract with a vendor where, to his knowledge, any of the following has a financial interest in that purchase or contract:

1. The Board member or other governing person, officer, employee, or agent;
2. Any member of their family by whole or half blood, step or personal relationship or relative-in-law;
3. An organization in which any of the above is an officer, director, or employee;
4. A person or organization with whom any of the above individuals is negotiating or has any arrangement concerning prospective employment or contracts.

D. **Duty to Disclosure** -- Any conflict of interest, potential conflict of interest, or the appearance of a conflict of interest is to be reported to the Board or other governing body or one's supervisor immediately.

E. **Board Action** -- When a conflict of interest is relevant to a matter requiring action by the Board of Directors/Trustees or other governing body, the Board member or other governing person, officer, employee, or agent (person(s)) must disclose the existence of the conflict of interest and be given the opportunity to disclose all material facts to the Board and members of committees with governing board delegated powers considering the possible conflict of interest. After disclosure of all material facts, and after any discussion with the person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

In addition, the person(s) shall not participate in the final deliberation or decision regarding the matter under consideration and shall leave the meeting during the discussion of and vote of the Board of Directors/Trustees or other governing body.

F. **Violations of the Conflicts of Interest Policy** -- If the Board of Directors/Trustees or other governing body has reasonable cause to believe a member, officer, employee or agent has failed to disclose actual or possible conflicts of interest, it shall inform the person of the basis for such belief and afford the person an opportunity to explain the alleged failure to disclose. If, after hearing the person's response and after making further investigation as warranted by the circumstances, the Board of Directors/Trustees or other

governing body determines the member, officer, employee or agent has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

G. Record of Conflict -- The minutes of the governing board and all committees with board delegated powers shall contain:

1. The names of the persons who disclosed or otherwise were found to have an actual or possible conflict of interest, the nature of the conflict of interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.
2. The names of the persons who were present for discussions and votes relating to the transaction or arrangement that presents a possible conflict of interest, the content of the discussion, including any alternatives to the transaction or arrangement, and a record of any votes taken in connection with the proceedings.

Approved by:

Name of Organization

Signature of Organization Official

Date

ATTACHMENT E – No Overdue Tax Debts

Instructions: Grantee/Contractor should complete this certification for all state funds received. Entity should enter appropriate data in the yellow highlighted areas. The completed and signed form should be provided to the County Department of Social Services/Human Services

Note: If you have a contract that extends more than one state fiscal year, you will need to obtain an updated certification for each year of the contract.

Entity's Letterhead

[Date of Certification (mmddyyyy)]

To: State Agency Head and Chief Fiscal Officer

Certification:

We certify that MasterWord Services, Inc. does not have any overdue tax debts, as defined by N.C.G.S. 105-243.1, at the federal, State, or local level. We further understand that any person who makes a false statement in violation of N.C.G.S. 143C-6-23(c) is guilty of a criminal offense punishable as provided by N.C.G.S.) 143C-10-1b.

Sworn Statement:

[Name of Board Chair] and [Name of Second Authorizing Official] being duly sworn, say that we are the Board Chair and [Title of the Second Authorizing Official], respectively, of [insert name of organization] of [City] in the State of [Name of State]; and that the foregoing certification is true, accurate and complete to the best of our knowledge and was made and subscribed by us. We also acknowledge and understand that any misuse of State funds will be reported to the appropriate authorities for further action.

Board Chair

[Title of Second Authorizing Official]

Sworn to and subscribed before me on the day of the date of said certification.

(Notary Signature and Seal)

My Commission Expires: _____

If there are any questions, please contact the state agency that provided your grant. If needed, you may contact the North Carolina Office of State Budget and Management:
NCGrants@osbm.nc.gov-(919)807-4795

¹ G.S. 105-243.1 defines: Overdue tax debt. – Any part of a tax debt that remains unpaid 90 days or more after the notice of final assessment was mailed to the taxpayer. The term does not include a tax debt, however, if the taxpayer entered into an installment agreement for the tax debt under G.S. 105-237 within 90 days after the notice of final assessment was mailed and has not failed to make any payments due under the installment agreement.”

ATTACHMENT I
UNION COUNTY CONSOLIDATED HUMAN SERVICES AGENCY HIPAA BUSINESS ASSOCIATE
ADDENDUM

This Agreement is made effective the ____ day of _____, 20__, by and between UNION COUNTY (“Covered Entity”) and MASTERWORD SERVICES, INC. (“Business Associate”) (collectively the “Parties”).

1. BACKGROUND

- (a) Covered Entity and Business Associate are parties to a contract for language interpretation and translation services dated _____, 20__ (the “Contract”), whereby Business Associate agrees to perform certain services for or on behalf of Covered Entity.
- (b) The Union County Consolidated Human Services Agency is an organizational unit of Covered Entity as a health care component for purposes of the HIPAA Privacy and Security Rules.
- (c) The relationship between Covered Entity and Business Associate is such that the Parties believe Business Associate is or may be a “business associate” within the meaning of the HIPAA Privacy and Security Rules.
- (d) The Parties enter into this Business Associate Addendum to the Contract with the intention of complying with the HIPAA Privacy and Security Rules provision that a covered entity may disclose electronic protected health information or other protected health information to a business associate, and may allow a business associate to create or receive electronic protected health information or other protected health information on its behalf, if the covered entity obtains satisfactory assurances that the business associate will appropriately safeguard the information.

2. DEFINITIONS

Unless some other meaning is clearly indicated by the context, the following terms shall have the following meaning in this Agreement:

- (a) “Breach” means the acquisition, access, use, or disclosure of PHI in a manner not permitted by 45 CFR 164 Subpart E which compromises the security or privacy of the PHI.
- (b) “Electronic Protected Health Information” shall have the same meaning as the term “electronic protected health information” in 45 CFR 160.103, limited to the information created or received by Business Associate from or on behalf of Covered Entity.
- (c) “HIPAA” means the Administrative Simplification Provisions, Sections 261 through 264, of the federal Health Insurance Portability and Accountability Act of 1996, Public Law 104-191.
- (d) “HITECH Act” means the “Health Information Technology for Economic and Clinical Health (“HITECH”) Act, Title XIII of Division A of the American Recovery and Reinvestment Act of 2009 (P.L. 111-5).
- (e) “Individual” shall have the same meaning as the term “individual” in 45 CFR 160.103 and shall include a person who qualifies as a personal representative in accordance with 45 CFR 164.502(g).
- (f) “Privacy and Security Rules” shall mean the Standards for Privacy of Individually Identifiable Health Information and the Security Standards for the Protection of Electronic Protected Health Information set out in 45 CFR part 160 and part 164.

- (g) "Protected Health Information" shall have the same meaning as the term "protected health information" in 45 CFR 160.103, limited to the information created or received by Business Associate from or on behalf of Covered Entity.
- (h) "Required By Law" shall have the same meaning as the term "required by law" in 45 CFR 164.103.
- (i) "Secretary" shall mean the Secretary of the United States Department of Health and Human Services or his designee.
- (j) "Security Incident" shall have the same meaning as the term "security incident" in 45 CFR 164.304.
- (k) "Unsecured Protected Health Information" shall have the same meaning as the term as the term "unsecured protected health information" in 45 CFR 164.402.
- (l) Unless otherwise defined in this Agreement, terms used herein shall have the same meaning as those terms have in the Privacy and Security Rules.

3. OBLIGATIONS OF BUSINESS ASSOCIATE

- (a) Business Associate agrees to not use or disclose Electronic Protected Health Information or other Protected Health Information other than as permitted or required by this Agreement or as Required by Law.
- (b) Business Associate agrees to use appropriate safeguards to prevent use or disclosure of the Electronic Protected Health Information and other Protected Health Information that it creates, receives, maintains, or transmits on behalf of Covered Entity, other than as provided for by this Agreement, as required by the Privacy and Security Rules. Business Associate shall review and modify its security measures and safeguards to continue provision of reasonable and appropriate protection of Electronic Protected Health Information, and update documentation of such security measures.
- (c) Business Associate agrees to mitigate, to the extent practicable, any harmful effect that is known to Business Associate of a use or disclosure of Electronic Protected Health Information or other Protected Health Information by Business Associate in violation of the requirements of this Agreement.
- (d) Business Associate agrees to report to Covered Entity (i) any use or disclosure of Electronic Protected Health Information or other Protected Health Information not provided for by this Agreement of which it becomes aware and (ii) any Security Incident or Breach of which it becomes aware.
- (e) Business Associate agrees to ensure that any agent, including a subcontractor, to whom it provides Electronic Protected Health Information and/or other Protected Health Information received from, or created, received or transmitted by Business Associate on behalf of Covered Entity, agrees to the same restrictions and conditions that apply through this Agreement to Business Associate with respect to such information.
- (f) Business Associate agrees to provide access, at the request of Covered Entity, to Electronic Protected Health Information and other Protected Health Information in a Designated Record Set to Covered Entity or, as directed by Covered Entity, to an Individual in order to meet the requirements under 45 CFR 164.524.
- (g) Business Associate agrees, at the request of the Covered Entity, to make any amendment(s) to Electronic Protected Health Information and other Protected Health Information in a Designated Record Set that the Covered Entity directs or agrees to pursuant to 45 CFR 164.526.

- (h) Unless otherwise prohibited by law, Business Associate agrees to make internal practices, books, and records, including policies and procedures concerning Electronic Protected Health Information and other Protected Health Information, relating to the use and disclosure of Electronic Protected Health Information and other Protected Health Information received from, or created or received by Business Associate on behalf of, Covered Entity available to the Covered Entity, or to the Union County Consolidated Human Services Agency, in a time and manner designated by the Secretary, for purposes of the Secretary determining Covered Entity's compliance with the Privacy and Security Rules.
- (i) Business Associate agrees to document such disclosures of Electronic Protected Health Information and other Protected Health Information related to such disclosures as would be required for Covered Entity to respond to a request by an individual for an accounting of disclosures of Electronic Protected Health Information and other Protected Health Information by Business Associate or its agents, including subcontractors, in accordance with 45 CFR 164.528 and Section 13405(c)(3) of the HITECH Act, and to provide this information to Covered Entity or an individual to permit such a response.
- (j) Business Associate will, pursuant to the HITECH Act and its implementing regulations, comply with all additional requirements of the Privacy and Security Rules as applicable to Business Associate, including specifically, but not limited to, the requirements of 45 CFR 164.308, 164.310, 164.312, and 164.316.
- (k) Following the discovery of a breach of security for unsecured Protected Health Information subject to this Agreement, Business Associate shall notify Covered Entity of the breach pursuant to 45 CFR 164.410 and Section 13402 of the HITECH Act, and shall include in the notification the information required by those provisions. Business Associate shall cooperate fully with and provide any information requested by Covered Entity in the Covered Entity's breach analysis procedures, including risk assessment. A breach shall be treated as discovered by Business Associate as of the first day on which such breach is known, or reasonably should have been known, to Business Associate to have occurred. Business Associate shall provide notification to Covered Entity without unreasonable delay, and in no event less than 30 calendar days after discovery of a breach by Business Associate.
- (l) Business Associate will, pursuant to the HITECH Act and its implementing regulations, comply with all additional applicable requirements of the Privacy Rule, including those contained in 45 CFR 164.502(e) and 164.504(e)(1)(ii), at such time as the requirements are applicable to Business Associate.
- (m) Business Associate shall not directly or indirectly receive remuneration in exchange for any protected health information except as specifically authorized by the Contract and by the HITECH Act Section 13405(d) and its implementing regulations.
- (n) Business Associate shall not engage in any communications within the definition of "marketing" in the HITECH Act except as authorized by the Contract and by the HITECH Act and its implementing regulations.

4. PERMITTED USES AND DISCLOSURES

- (a) Except as otherwise limited in this Agreement or by other applicable law or agreement, if the Contract permits, Business Associate may use or disclose Electronic Protected Health Information and other Protected Health Information to perform functions, activities, or services for, or on behalf of, Covered Entity as specified in the Contract, provided that such use or disclosure:

- (1) would not violate the Privacy and Security Rules if done by Covered Entity; or
 - (2) would not violate the minimum necessary policies and procedures of the Covered Entity.
- (b) Business Associate may use and disclose Protected Health Information subject to this Agreement only if such use or disclosure is in compliance with each applicable requirement of 45 CFR 164.504(e) pursuant to the HITECH Act.
- (c) Except as otherwise limited in this Agreement or by other applicable law or agreements, if the Contract permits, Business Associate may use Electronic Protected Health Information and other Protected Health Information as necessary for the proper management and administration of the Business Associate or to carry out the legal responsibilities of the Business Associate.
- (d) Except as otherwise limited in this Agreement or by other applicable law or agreements, if the Contract permits, Business Associate may disclose Electronic Protected Health Information and other Protected Health Information for the proper management and administration of the Business Associate, provided that:
- (1) disclosures are Required By Law; or
 - (2) Business Associate obtains reasonable assurances from the person to whom the information is disclosed that it will remain confidential and will be used or further disclosed only as Required By Law or for the purpose for which it was disclosed to the person, and the person notifies the Business Associate of any instances of which it is aware in which the confidentiality of the information has been breached.
- (e) Except as otherwise limited in this Agreement or by other applicable law or agreements, if the Contract permits, Business Associate may use Electronic Protected Health Information and other Protected Health Information to provide data aggregation services to Covered Entity as permitted by 45 CFR 164.504(e)(2)(i)(B).
- (f) When using or disclosing PHI or when requesting PHI from a covered entity or other business associate, Business Associate must make reasonable efforts to limit PHI to the minimum necessary to accomplish the intended purpose of the use, disclosure, or request.
- (g) Notwithstanding the foregoing provisions, Business Associate may not use or disclose Electronic Protected Health Information or other Protected Health Information if the use or disclosure would violate any term of the Contract or other applicable law or agreements.

5. TERM AND TERMINATION

- (a) Term. This Agreement shall be effective as of the effective date stated above and shall terminate when the Contract terminates.
- (b) Termination for Cause. Upon Covered Entity's knowledge of a material breach by Business Associate, Covered Entity may, at its option:
- (3) Provide an opportunity for Business Associate to cure the breach or end the violation, and terminate this Agreement and services provided by Business Associate, to the extent permissible by law, if Business Associate does not cure the breach or end the violation within the time specified by Covered Entity;
 - (4) Immediately terminate this Agreement and services provided by Business Associate, to the extent permissible by law; or
 - (5) If neither termination nor cure is feasible, report the violation to the Secretary as

provided in the Privacy and Security Rules.

- (c) Effect of Termination.
 - (1) Except as provided in paragraph (2) of this section or in the Contract or by other applicable law or agreements, upon termination of this Agreement and services provided by Business Associate, for any reason, Business Associate shall return or destroy all Electronic Protected Health Information and other Protected Health Information received from Covered Entity, or created or received by Business Associate on behalf of Covered Entity. This provision shall apply to Electronic Protected Health Information and other Protected Health Information that is in the possession of subcontractors or agents of Business Associate. Business Associate shall retain no copies of the Electronic Protected Health Information or other Protected Health Information.
 - (2) In the event that Business Associate determines that returning or destroying the Electronic Protected Health Information or other Protected Health Information is not feasible, Business Associate shall provide to Covered Entity notification of the conditions that make return or destruction not feasible. Business Associate shall extend the protections of this Agreement to such Electronic Protected Health Information and other Protected Health Information and limit further uses and disclosures of such Electronic Protected Health Information and other Protected Health Information to those purposes that make the return or destruction infeasible, for so long as Business Associate maintains such Electronic Protected Health Information and other Protected Health Information.

6. GENERAL TERMS AND CONDITIONS

- (a) This Agreement amends and is part of the Contract.
- (b) Except as provided in this Agreement, all terms and conditions of the Contract shall remain in force and shall apply to this Agreement as if set forth fully herein.
- (c) In the event of a conflict in terms between this Agreement and the Contract, the interpretation that is in accordance with the Privacy and Security Rules shall prevail. In the event that a conflict then remains, the Contract terms shall prevail so long as they are in accordance with the Privacy and Security Rules.
- (d) A breach of this Agreement by Business Associate shall be considered sufficient basis for Covered Entity to terminate the Contract for cause.

SIGNATURES:

MASTERWORD SERVICES, INC.:

(Signature)

(Date)

(Printed Name & Title)

UNION COUNTY:

Brian W. Matthews, County Manager

(Date)

ATTACHMENT J

CERTIFICATION REGARDING TRANSPORTATION

Union County Consolidated Human Services Agency

By execution of this Agreement the Contractor certifies that it will provide safe client transportation by:

1. Insuring that all drivers (including employees, contractors, contractor’s employees, and volunteers) shall be at least 18 years of age;
2. Insuring that all drivers (including employees, contractors, contractor’s employees, and volunteers) shall be licensed to operate the specific vehicle used in transporting clients in accordance with Chapter 20-7 of the General Statutes of North Carolina and the Division of Motor Vehicle requirements;
3. Insuring that all vehicles transporting clients shall have at least the minimum level of liability insurance appropriate for the type of vehicle as defined by Article 7, Rule R2-36 of the North Carolina Utilities Commission;
4. Insuring that the contractor shall have written policies and procedures regarding how drivers handle and report client emergencies and/or vehicle crashes involving clients to contractor and how contractor notifies the Union County Department of Social Services;
5. Insuring that no more than one quarter of one percent of all trips be missed by the contractor during the course of the contract period; (*Medicaid only*)
6. Insuring that that no more than five percent (5%) of trips should be late for recipient drop off to their appointment per month; (*Medicaid only*)
7. Contractor will maintain records documenting the following (*County may require contractor to provide*):
 - a. Valid current copies of Drivers License for all drivers;
 - b. Current valid Vehicle Registration, for all vehicles transporting clients;
 - c. Driving records for all drivers for the past three years and with annual updates;
 - d. Criminal Background checks through North Carolina Law Enforcement or NCIC prior to employment and every three years thereafter;
 - e. Alcohol and Drug Testing policy to meet the Federal Transit Authority guidelines.
8. Disclosing, at the outset of the contract, upon renewal and upon request, any criminal convictions or other reasons for disqualifications from participation in Medicare, Medicaid or Title XX programs (*signature on this form confirms this statement*).

Signature

Title

MasterWord Services, Inc.

Date

Agency/Organization

(Certification signature should be same as Contract signature.)

ATTACHMENT K

What is a Private Non Profit Agency?

Answer: A private non profit is an organization that is incorporated under State law and whose purpose is not to make a profit, but rather to further a charitable, civic, religious, scientific, or other lawful purpose. The Secretary of State's office grants corporate status to organizations in North Carolina.

What is a 501(c)(3) designation?

Answer: When the agency becomes a state private non profit corporation, it can then apply for 501(c)(3) designation through the IRS. Once the IRS grants 501(c)(3) status, the organization is exempt from certain taxes and any donations to the charitable organization are tax deductible. Many individuals and organizations prefer to make donations to 501(c)(3) private non profits.

Who can obtain a 501(c)(3) designation?

Answer: Any organization or group can apply for 501(c)(3) status, provided their charter or mission focuses on the non profit's objective.

Another option is to apply for a 509(a)(1) status which falls under the 501(c)(3) umbrella. Being a 509(a)(1) designates an organization as a tax-free public charity that receives most of its support from a governmental unit or from the general public. Becoming a 509(a)(1) provides public recognition of tax-exempt status, advance assurance to donors of deductibility of contributions, exemption from certain State and federal taxes, and non profit mailing privileges. Organizations that typically qualify are churches, educational institutions, hospitals, and governmental units.

How does a Private Non Profit obtain Tax Exempt Status?

EO Web Site [www.irs.gov/eo]

IRS TE/GE Customer Service

You may direct technical and procedural questions concerning charities and other nonprofit organizations, including questions about your tax-exempt status and tax liability, to the IRS Tax Exempt and Government Entities Customer Account Services at (877) 829-5500 (toll-free number).

If you prefer to write, you may write at:

Internal Revenue Service
Exempt Organizations Determinations
P.O. Box 2508
Cincinnati, OH 45201

You may also contact the [Taxpayer Advocate Service](#), an independent organization within the IRS that helps taxpayers resolve problems with the IRS and recommends changes that will prevent problems.

A private non profit must apply to the IRS for tax exempt status. To qualify, applicants must complete and submit to the IRS Form 1023. Once federal tax exempt status is granted, the private non profit applies for State tax exempt status by completing Form CD-435 and submitting it to the N. C. Department of Revenue.

What must a County Department of Social Services/Human Services do?

Answer: Verify the Tax Exempt Letter. Check date for expiration and check if current address of agency is reflected.

ATTACHMENT M - CONTRACTOR'S TAX ID NUMBER

Contractor's Tax ID Number is 76-0393601

**ATTACHMENT N
State Certifications**

Contractor Certifications Required by North Carolina Law

Instructions: The person who signs this document should read the text of the statutes and Executive Order listed below and consult with counsel and other knowledgeable persons before signing. The text of each North Carolina General Statutes and of the Executive Order can be found online at:

- Article 2 of Chapter 64: http://www.ncga.state.nc.us/EnactedLegislation/Statutes/PDF/ByArticle/Chapter_64/Article_2.pdf
- G.S. 133-32: <http://www.ncga.state.nc.us/gascripts/statutes/statutelookup.pl?statute=133-32>
- Executive Order No. 24 (Perdue, Gov., Oct. 1, 2009): <http://www.ethicscommission.nc.gov/library/pdfs/Laws/EO24.pdf>
- G.S. 105-164.8(b): http://www.ncga.state.nc.us/EnactedLegislation/Statutes/PDF/BySection/Chapter_105/GS_105-164.8.pdf
- G.S. 143-48.5: http://www.ncga.state.nc.us/EnactedLegislation/Statutes/HTML/BySection/Chapter_143/GS_143-48.5.html
- G.S. 143-59.1: http://www.ncga.state.nc.us/EnactedLegislation/Statutes/PDF/BySection/Chapter_143/GS_143-59.1.pdf
- G.S. 143-59.2: http://www.ncga.state.nc.us/EnactedLegislation/Statutes/PDF/BySection/Chapter_143/GS_143-59.2.pdf
- G.S. 143-133.3: http://www.ncga.state.nc.us/EnactedLegislation/Statutes/HTML/BySection/Chapter_143/GS_143-133.3.html
- G.S. 143B-139.6C: http://www.ncga.state.nc.us/EnactedLegislation/Statutes/PDF/BySection/Chapter_143B/GS_143B-139.6C.pdf

Certifications

- (1) Pursuant to G.S. 133-32 and Executive Order No. 24 (Perdue, Gov., Oct. 1, 2009), the undersigned hereby certifies that the Contractor named below is in compliance with, and has not violated, the provisions of either said statute or Executive Order.
- (2) Pursuant to G.S. 143-48.5 and G.S. 143-133.3, the undersigned hereby certifies that the Contractor named below, and the Contractor's subcontractors, complies with the requirements of Article 2 of Chapter 64 of the NC General Statutes, including the requirement for each employer with more than 25 employees in North Carolina to verify the work authorization of its employees through the federal E-Verify system." E-Verify System Link: www.uscis.gov
- (3) Pursuant to G.S. 143-59.1(b), the undersigned hereby certifies that the Contractor named below is not an "ineligible Contractor" as set forth in G.S. 143-59.1(a) because:
- (a) Neither the Contractor nor any of its affiliates has refused to collect the use tax levied under Article 5 of Chapter 105 of the General Statutes on its sales delivered to North Carolina when the sales met one or more of the conditions of G.S. 105-164.8(b); **and**
- (b) [check **one** of the following boxes]
- Neither the Contractor nor any of its affiliates has incorporated or reincorporated in a "tax haven country" as set forth in G.S. 143-59.1(c)(2) after December 31, 2001; **or**
- The Contractor or one of its affiliates **has** incorporated or reincorporated in a "tax haven country" as set forth in G.S. 143-59.1(c)(2) after December 31, 2001 **but** the United States is not the principal market for the public trading of the stock of the corporation incorporated in the tax haven country.
- (4) Pursuant to G.S. 143-59.2(b), the undersigned hereby certifies that none of the Contractor's officers, directors, or owners (if the Contractor is an unincorporated business entity) has been convicted of any violation of Chapter 78A of the General Statutes or the Securities Act of 1933 or the Securities Exchange Act of 1934 within 10 years immediately prior to the date of the bid solicitation.
- (5) Pursuant to G.S. 143B-139.6C, the undersigned hereby certifies that the Contractor will not use a former employee, as defined by G.S. 143B-139.6C(d)(2), of the North Carolina Department of Health and Human Services in the administration of a contract with the Department in violation of G.S. 143B-139.6C and that a violation of that statute shall void the Agreement.
- (6) The undersigned hereby certifies further that:
- (a) He or she is a duly authorized representative of the Contractor named below;
- (b) He or she is authorized to make, and does hereby make, the foregoing certifications on behalf of the Contractor; and
- (c) He or she understands that any person who knowingly submits a false certification in response to the requirements of G.S. 143-59.1 and -59.2 shall be guilty of a Class I felony.

Contractor's Name: MasterWord Services, Inc.

Contractor's
Authorized Agent: Signature _____ Date _____

Printed Name _____ Title _____

Witness: Signature _____ Date _____

Printed Name _____ Title _____

The witness should be present when the Contractor's Authorized Agent signs this certification and should sign and date this document immediately thereafter.

ATTACHMENT O

Union County Consolidated Human Services Agency

CERTIFICATION REGARDING NONDISCRIMINATION, CLEAN AIR ACT, CLEAN WATER ACT

Certification Regarding Nondiscrimination

The Contractor certifies that it will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. §§3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (h) the Food Stamp Act and USDA policy, which prohibit discrimination on the basis of religion and political beliefs; and (i) the requirements of any other nondiscrimination statutes which may apply to this Agreement.

The Contractor must comply with Executive Order 11246, entitled "Equal Employment Opportunity," as amended by Executive Order 11375, and as supplemented by the Department of Labor Regulations (41 CFR Part 60): The Executive Order prohibits federal contractors and federally-assisted construction contractors and subcontractors who do over \$10,000 in Government business in one year from discriminating in employment decisions on the basis of race, color, religion, sex, or national origin. The Executive Order also requires Government contractors to take affirmative action to ensure that equal opportunity is provided in all aspects of their employment.

Meaningful Access for LEP Individuals: **The Contractor** that participate in the SNAP must take reasonable steps to ensure that LEP persons have meaningful access to programs, services, and benefits. This includes the requirement to provide bilingual program information and certification materials and interpretation services to single language minorities in certain project areas. SNAP Contractors that do not provide meaningful access for LEP individuals risk violating prohibitions against discrimination based on National Origin in the Food and Nutrition Act of 2008, as amended, Title VI of the Civil Rights Act of 1964 (Title VI) and SNAP program regulations at 7 CFR 272A(b). They also risk noncompliance with the USDA policy guidance titled, "Guidance to Federal Financial Assistance Recipients Regarding Title VI Prohibition Against National Origin Discrimination Affecting Limited English Proficient Persons", published in 79 FR 70771 - 70784 (November 28, 2014).

The Contractor should develop an implementing plan to address the language assistance needs of the LEP population served. This may include contracting for oral interpretation services, hiring bilingual staff, arranging telephone interpreters and/or language lines, coordinating community volunteers, translating vital documents, and providing written notice that language services are available in appropriate languages. Quality and accuracy of the language service is critical in order to avoid serious consequences to the LEP person and to the recipient. LEP needs should be considered in developing budgets and front line staff should understand how to obtain language assistance services. For additional assistance and information regarding LEP matters, please also visit <http://www.lep.gov>.

Ensuring Equal Opportunity Access for Persons with Disabilities: **The Contractor** must also ensure equal opportunity access for persons with disabilities. This includes ensuring that communications with applicants, participants, members of the public, and companions with disabilities are as effective as communications with people without disabilities. Contractors that do not provide persons with disabilities equal opportunity access to programs may risk violating prohibitions against disability discrimination in the Rehabilitation Act of 1978, the American with Disabilities Act (ADA) of 1990, as amended, and SNAP program regulations. DOJ published revised final regulations implementing Title II and Title III of the ADA on September 15, 2010. These regulations are codified at 28 CFR Part 35 "Nondiscrimination on the Basis of Disability in State and Local Government Services" and at 28 CFR Part 36 "Nondiscrimination on the Basis of Disability in Public Accommodations and Commercial Facilities". In accordance with the implementing regulations, Contractors must provide auxiliary aids and services where necessary to ensure effective communication and equal opportunity access to program benefits for individuals with disabilities. The type of auxiliary aids and services required will vary, but a Contractor may not require an individual with a disability to bring another individual to interpret, and may rely on a person accompanying a disabled individual only in limited circumstances. When a Contractor communicates with applicants and beneficiaries by telephone, it must provide text telephone services (TTY) or have access to an equally effective electronic telecommunications system to communicate with individuals who are deaf, hard of hearing, or hearing impaired. Contractors must also ensure that interested persons, including persons with impaired vision or hearing, can obtain information as to the existence and location of accessible services, activities, and facilities. For more information, please visit the ADA website: <http://www.ada.gov>.

IV. The Clean Air Act, Section 306; 42 U.S.C. §7401 et seq. (1970)

- a. No Federal agency may enter into any contract with any person who is convicted of any offense under section 113(c) for the procurement of goods, materials, and services to perform such contract at any facility at which the violation which gave rise to such conviction occurred if such facility is owned, leased, or supervised by such person. The prohibition in the preceding sentence shall continue until the Administrator certifies that the condition giving rise to such a conviction has been corrected. For convictions arising under section 113(c)(2), the condition giving rise to the conviction also shall be considered to include any substantive violation of this Act associated with the violation of 113(c)(2). The Administrator may extend this prohibition to other facilities owned or operated by the convicted person.
 - b. The Administrator shall establish procedures to provide all Federal agencies with the notification necessary for the purposes of subsection (a).
 - c. In order to implement the purposes and policy of this Act to protect and enhance the quality of the Nation's air, the President shall, not more than 180 days after enactment of the Clean Air Amendments of 1970 cause to be issued an order (1) requiring each Federal agency authorized to enter into contracts and each Federal agency which is empowered to extend Federal assistance by way of grant, loan, or contract to effectuate the purpose and policy of this Act in such contracting or assistance activities, and (2) setting forth procedures, sanctions, penalties, and such other provisions, as the President determines necessary to carry out such requirement.
 - d. The President may exempt any contract, loan, or grant from all or part of the provisions of this section where he determines such exemption is necessary in the paramount interest of the United States and he shall notify the Congress of such exemption.
 - e. The President shall annually report to the Congress on measures taken toward implementing the purpose and intent of this section, including but not limited to the progress and problems associated with implementation of this section. [42 U.S.C. 7606]
- (Federal Certification-Non-Discrimination, Clean Air, Clean Water) (01/2018) Page 2 of 3

V. The Clean Water Act; 33 U.S.C. §1251 et seq. (1972)

- a. No Federal agency may enter into any contract with any person who has been convicted of any offense under Section 309(c) of this Act for the procurement of goods, materials, and services if such contract is to be performed at any facility at which the violation which gave rise to such conviction occurred, and if such facility is owned, leased, or supervised by such person. The prohibition in preceding sentence shall continue until the Administrator certifies that the condition giving rise to such conviction has been corrected.
- b. The Administrator shall establish procedures to provide all Federal agencies with the notification necessary for the purposes of subsection (a) of this section.
- c. In order to implement the purposes and policy of this Act to protect and enhance the quality of the Nation's water, the President shall, not more than 180 days after the enactment of this Act, cause to be issued an order:
 - (i) requiring each Federal agency authorized to enter into contracts and each Federal agency which is empowered to extend Federal assistance by way of grant, loan, or contract to effectuate the purpose and policy of this Act in such contracting or assistance activities, and
 - (ii) setting forth procedures, sanctions, penalties, and such other provisions, as the President determines necessary to carry out such requirement.
- d. The President may exempt any contract, loan, or grant from all or part of the provisions of this section where he determines such exemption is necessary in the paramount interest of the United States and he shall notify the Congress of such exemption.
- e. The President shall annually report to the Congress on measures taken in compliance with the purpose and intent of this section, including, but not limited to, the progress and problems associated with such compliance.
- f. No certification by a contractor, and no contract clause, may be required in the case of a contract for the acquisition of commercial items in order to implement a prohibition or requirement of this section or a prohibition or requirement issued in the implementation of this section.
- g. In paragraph (1), the term "commercial item" has the meaning given such term in section 4(12) of the Office of Federal Procurement Policy Act (41 U.S.C. 403(12)).

Signature

Title

MasterWord Services, Inc.
Agency/Organization

Date

(Certification signature should be same as Contract signature.)



Union County, NC

Staff Report

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

File #: 25-614

Agenda Date: 10/6/2025

TITLE:

Budget Amendment - Environmental Health

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Recognize, receive, and appropriate \$27,255 in additional state funding from the North Carolina Division of Public Health for Environmental Health Division staff to address lead in water and lead-based paint in public schools and childcare facilities and 2) adopt Special Revenue Ordinance #92A.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Lead and asbestos are well known to be hazardous to human health and particularly the health of children, whose bodies are still developing and who are therefore uniquely vulnerable to the risks posed by lead and asbestos. Although the use of certain materials containing lead and asbestos has been banned in the United States, exposure to both lead and asbestos hazards can still occur in the built environment through things like deteriorating lead-based paint, lead containing pipes, plumbing fixtures, and solder that are used to carry drinking water, asbestos ceiling and floor tiles, asbestos insulation, and other products and materials containing lead or asbestos. Exposure to lead and asbestos hazards can be prevented by inspecting facilities and then restricting access to, remediating, or abating any hazards that are identified through the inspection process.

This Agreement Addendum (AA914 - ARPA Addressing Lead in Water and Lead-Based Paint in Public Schools and Child Care Facilities) provides funds for Union County Public Health to (1) conduct first draw, post-remediation water lead samples at schools and childcare facilities according to proposed administrative rules 10ANCAC 41C .1005; (2). Conduct follow-up and environmental lead investigations for those schools and facilities where lead-based paint hazards are identified and remain unaddressed; (3) documenting all site visits in the North Carolina Lead Surveillance System (NC LEAD); and (4) document compliance by the schools and facilities with the inspection requirements in 10A NCAC 41C .1004 during local health department routine visits.

FINANCIAL IMPACT:

The County will receive \$27,255 in FY26 funding from the North Carolina Division of Public Health for the Environmental Health Division of the Union County Public Health Department to address lead in water and lead-based paint in public schools and childcare facilities. No County match is required

Division of Public Health

Agreement Addendum

FY 25-26

Union County Consolidated Human Services
 Agency, Public Health Department

Local Health Department Legal Name

914 ARPA Addressing Lead in Water
 and Lead-Based Paint in Public Schools
 and Child Care Facilities

Activity Number and Description

06/01/2025 – 05/31/2026

Service Period

07/01/2025 – 06/30/2026

Payment Period

Original Agreement Addendum
 Agreement Addendum Revision # _____

Environmental Health Section /
 Lead and Asbestos Branch

DPH Section / Branch Name

Ed Norman, (919) 218-6511
 ed.norman@dhhs.nc.gov

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

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

I. Background:

Lead and asbestos are well known to be hazardous to human health and particularly the health of children, whose bodies are still developing and who are therefore uniquely vulnerable to the risks posed by lead and asbestos. Although the use of certain materials containing lead and asbestos has been banned in the United States, exposure to both lead and asbestos hazards can still occur in the built environment through things like deteriorating lead-based paint, lead-containing pipes, plumbing, fixtures, and solder that are used to carry drinking water, asbestos ceiling and floor tiles, asbestos insulation, and other products and materials containing lead or asbestos. Exposure to lead and asbestos hazards can be prevented by inspecting facilities and then restricting access to, remediating, or abating any hazards that are identified through the inspection process.

In Session Law 2021-180 Senate Bill 105, the North Carolina General Assembly appropriated \$150 million in funds from the American Rescue Plan Act of 2021 (ARPA) via the State Fiscal Recovery Fund (SFRF), directing the Division of Public Health (DPH) to establish programs for the detection and remediation of lead and asbestos in public school units and licensed child care facilities. Of that amount, \$32,812,500 was to be used to fund a program for lead testing and remediation in drinking water and \$117,187,500 was to be used to fund a program for inspecting and addressing (e.g., remediation, abatement) lead-based paint and asbestos hazards. Collectively, the two programs make up the “Lead and Asbestos Inspection, Testing, Abatement, and Remediation in North Carolina Public Schools and Licensed Child Care Facilities” project. As allowed by the Session Law, DPH staff in the Environmental Health Section proposed permanent administrative rules 10A NCAC 41A .1001-.1007 to

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

LHD to complete: [For DPH to contact in case follow-up information is needed.]	LHD program contact name: _____ Phone and email address: _____
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the Commission for Public Health to support those objectives of testing, inspection, abatement and remediation. The permanent rules were approved by the Rules Review Commission and went into effect April 1, 2023.

The “Lead and Asbestos Inspection, Testing, Abatement, and Remediation in North Carolina Public Schools and Licensed Child Care Facilities” project is large, multi-faceted, and time sensitive. The goal of the project is to conduct the testing/remediation for lead in water and inspection/remediation for lead-based paint and asbestos at all NC public schools and licensed child care facilities. There are over 4,200 licensed child care centers, 1,250 licensed family child care homes, and 2,700 public schools across the state that may be eligible for this funding, and project work must be completed by December 31, 2026, as stated in the Session Law.

In order to be successful, DPH must rely on the combined effort of many internal and external partners, including local health departments’ registered environmental health specialists. We anticipate a subset of schools and child care facilities that are tested for lead in water or inspected for lead-based paint will have identified hazards requiring follow-up activities by Children’s Environmental Health Unit regional field staff. The Children’s Environmental Health Unit regional field staff could not complete this work without the assistance of the local health departments.

II. **Purpose:**

The goal of the “Lead and Asbestos Inspection, Testing, Abatement, and Remediation in North Carolina Public Schools and Licensed Child Care Facilities” project is to conduct testing and remediation for lead in water, and inspection and remediation for lead-based paint and asbestos at all North Carolina public schools and licensed child care facilities. For the entire project, those activities which require Local Health Department assistance are expected to run through May 2026.

The Local Health Department supports those project goals by performing several tasks at public schools and child care facilities that are within the local health department’s jurisdiction. These activities include: (1) conducting first draw, post-remediation water lead samples at schools and child care facilities according to proposed permanent administrative rules 10A NCAC 41C .1005; (2) conducting follow-up and environmental lead investigations for those schools and facilities where lead-based paint hazards are identified and remain unaddressed; (3) documenting all site visits in the North Carolina Lead Surveillance System (NC LEAD)¹; and (4) documenting compliance by the schools and facilities with the inspection requirements in 10A NCAC 41C .1004 during the LHD’s routine site visits.

III. **Scope of Work and Deliverables:**

The Local Health Department (LHD) shall:

1. Conduct at least one site visit for every drinking water and food preparation outlet at public schools and licensed child care facilities in the county that had a lead concentration at or above the lead poisoning hazard level (≥ 10 parts per billion) in initial water test results and were subsequently remediated. This is estimated to occur for approximately 3% of all water samples collected. Site visits should occur within 30 days of notification that remediation has occurred. At the site visit, “first draw” water samples must be collected according to EPA 3T’s method as mentioned in 10A NCAC 41C .1005 and submitted to the State Laboratory of Public Health for analysis.
2. Conduct at least one site visit to public schools and child care facilities that identified lead-based paint hazards, as mentioned in 10A NCAC 41C .1004 and which did not pursue abatement reimbursement. The purpose of each site visit is to ensure continued inaccessibility of lead hazards.

¹ NC LEAD is a module of NC EDSS, the North Carolina Electronic Disease Surveillance System.

Each site visit should occur within 30 days of the notification that hazards were identified for which no abatement reimbursement plans were made.

3. Be available for consultations related to water or lead-based paint hazards identified.
4. In NC LEAD, document all ARPA-related activities within 30 days of occurrence. This includes:
 - a. all site visits for lead in water or lead-based paint
 - b. all conversations with school and facility personnel, and
 - c. all environmental and water sample test results that have been received from post-remediation water lead sampling.
5. In the Environmental Health Inspection Data System (EHIDS), document whether a school has conducted its lead in water testing as required by 10A NCAC 41C .1005 on the school sanitation grade sheet (Form EHS 1163) comment section within 30 days of each annual inspection.
6. In EHIDS, document whether a child care center has conducted its lead in water testing as required by 18A NCAC 15A .2816 on the child care sanitation grade sheet (Form EHS 1617) within 30 days of each semi-annual inspection.

IV. Performance Measures / Reporting Requirements:

1. Performance shall be measured with the following metrics:
 - a. Number and percentage of site visits (visit details, water test results, remediation effort) that were documented in NC LEAD within 30 days of the site visit.
 - b. Number and percentage of site visits (visit details, documentation of inaccessibility of lead hazards) that were documented in NC LEAD within 30 days of the site visit.
 - c. Completion of any incomplete documentation in NC LEAD within 30 days of notification that there is incomplete documentation or new lead test results. (Children’s Environmental Health Unit staff will notify the LHD of any documentation that is incomplete. The State Laboratory of Public Health will notify the LHD of any lead test results that were submitted to them for analysis, so those results can be entered.)
2. Reporting Requirements
 - a. Document each public school site visit and child care facility site visit in NC LEAD within 30 days of each visit.
 - b. Enter data or upload each school sanitation grade sheet (Form EHS 1163) documenting whether the school has conducted lead in water testing as required by 10A NCAC 41C .1005 to the Environmental Health Inspection Data System (EHIDS) within 30 days of inspection.
 - c. Enter data or upload each child care sanitation grade sheet (Form EHS 1617) documenting whether the child care center has conducted lead in water testing as required by 18A NCAC 15A .2816 to the Environmental Health Inspection Data System within 30 days of inspection.

3. Reporting Required Subcontract Information

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

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

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

The following information must be provided to the DPH Program Contact listed on Page 1 of this AA for review prior to the entity being awarded a contract or agreement from the LHD:

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

V. Performance Monitoring and Quality Assurance:

The Children’s Environmental Health Unit regional field staff will monitor performance during routine onsite program reviews that will occur at least annually.

The Children’s Environmental Health Unit Raleigh-based staff will monitor performance through monthly reviews of reports obtained by the three data systems which will capture all data related to site visits and test results: NC LEAD, the Project vendor’s public mapper, and EHIDS.

NC LEAD and the public mapper will document all test results for a school or facility, along with remediation efforts. Monitoring of NCLEAD and public mapper data system will occur at least monthly to identify whether site visits, test results and remediation efforts have been entered as required.

The EHIDS will detail when lead in water hazards are mentioned. This will appear as data entered directly into EHIDS or will appear on uploaded forms [either in the comment section on the school sanitation grade sheet (EHS Form 1163) or when the child care sanitation grade sheet (Form EHS 1617, item number 20) is marked to indicate that identified lead poisoning hazards were detected in accordance with NCGS 130A-131.7(7)].

If the LHD is deemed out of compliance, the Children’s Environmental Health regional field staff will provide technical assistance and a corrective action plan may be requested. Funds may be withheld until the LHD is back in compliance.

VI. Funding Guidelines or Restrictions:

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

“I certify to the best of my knowledge and belief that the information provided herein is true, complete, and accurate. I am aware that the provision of false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil, or administrative consequences including, but not limited to violations of U.S. Code Title 18, Sections 2, 1001, 1343 and Title 31, Sections 3729-3730 and 3801-3812.”
2. The ARPA Lead and Asbestos Project funds are distributed based on the attached Aid-to-Counties Calculations Spreadsheet. The Local Health Department shall use this funding to support activities of the lead program including the “Lead & Asbestos Remediation in School & Child Care Facilities” ARPA-funded project.
3. Acceptable fund expenditures include, but are not limited to, sampling, shipping, analysis, travel for sample collection, if needed, data management, staff salary and fringe support, and expenditures associated with providing support to the ARPA-funded project.

FY26 - FAS Activity Nbr + Name: **914** **ARPA Addressing Lead in Water and Lead-based Paint in Schools and Child Care Facilities**
 federal award supplement FAS Number + Reason: **1** This FAS is accompanying an AA+BE or an AA Revision+BE Revision.
 Assistance Listing Nbr + Name: **21.027** Coronavirus State and Local Fiscal Recovery Funds
 Is award R&D?: **NO** FAIN: **SLFRP0129** IDC rate: **n/a** Fed awd total amt: \$ **150,000,000**
 Fed award project description: The American Rescue Plan Act of 2021 (ARPA) directing DPH to establish programs for the detection and remediation of lead and asbestos in public schools
 Fed awd date + awarding agency: **05-18-21** U.S. Department of the Treasury

Subrecipient	Subrecipient's UEI	Federal funds from grant listed above	Total federal funds for entire Activity	Subrecipient	Subrecipient's UEI	Federal funds from grant listed above	Total federal funds for entire Activity
Alamance	F5VHYUU13NC5			Jackson	X7YWWY6ZP574		
Albemarle	WAAVS51PNMK3			Johnston	SYGAGFDHYR7		
Alexander	XVEEJSNY7UX9			Jones	HE3NNNUE27M7		
Anson	PK8UYTSNJCC3			Lee	F6A8UC99JWJ5		
Appalachian	CD7BFHB8W539			Lenoir	QKUFLL37VPGH6		
Beaufort	RN1SXF4LXN6			Lincoln	UGGQGS5KBJG5		
Bladen	TLCTJWDJH1H9	\$ 11,155	\$ 11,155	Macon	LLPJBC6N2LL3		
Brunswick	MJBMXLN9NJT5			Madison	YQ96F8BJYTJ9		
Buncombe	W5TCDKMLHE69			MTW	ZKK5GNRNBBY6		
Burke	KVJHUFURQDM5			Mecklenburg	EZ15XL6BMM68		
Cabarrus	RDXNEJKJFU7	\$ 11,155	\$ 11,155	Montgomery	E78ZAJM3BFL3		
Caldwell	HL4FGNNGE97	\$ 11,155	\$ 11,155	Moore	HFNSK95FS7Z8		
Carteret	UC6WJ2MQMJS8			Nash	NF58K566HQM7		
Caswell	JDJ7Y7CGYC86			New Hanover	F7TLT2GMEJE1		
Catawba	GYUNA9W1NFM1			Northampton	CRA2KCAL8BA4		
Chatham	KE57QE2GV5F1	\$ 18,148	\$ 18,148	Onslow	EGE7NBXW5JS6		
Cherokee	DCEGK6HA11M5			Orange	GFFMCW9XDA53	\$ 19,067	\$ 19,067
Clay	HYKLQVNWLXK7			Pamlico	FT59QFEAU344	\$ 11,155	\$ 11,155
Cleveland	UWMUYMPVL483			Pender	T11BE678U9P5	\$ 11,155	\$ 11,155
Columbus	V1UAJ4L87WQ7	\$ 3,000	\$ 3,000	Person	FQ8LFJGMABJ4		
Craven	LTZ2U8LZQ214	\$ 13,506	\$ 13,506	Pitt	VZNPCLFT5R6		
Cumberland	HALND8WJ3GW4			Polk	QZ6BZPGLX4Y9		
Dare	ELV6JGB11QK6			Randolph	T3BUM1CVS9N5	\$ 11,155	\$ 11,155
Davidson	C9P5MDJC7KY7	\$ 24,681	\$ 24,681	Richmond	Q63FZNTJM3M4		
Davie	L8WBGLHZV239			Robeson	LKBEJQFLAAK5		
Duplin	KZN4GK5262K3			Rockingham	KGCCCHJJZZ43		
Durham	LJ5BA6U2HLM7			Rowan	GCB7UCV96NW6		
Edgecombe	MAN4LX44AD17			Sampson	WRT9CSK1KJY5	\$ 11,155	\$ 11,155
Foothills	NGTEF2MQ8LL4			Scotland	FNVTCUQGCHM5		
Forsyth	V6BGVQ67YPY5			Stanly	U86MZUYPL7C5	\$ 16,412	\$ 16,412
Franklin	FFKTRQCNN143			Stokes	W41TRA3NUNS1		
Gaston	QKY9R8A8D5J6			Surry	FMWCTM24C9J8		
Graham	L8MAVKQJTYN7			Swain	TAE3M92L4QR4		
Granv-Vance	MGQJKK22EJB3			Toe River	JUA6GAUQ9UM1		
Greene	VCU5LD71N9U3			Transylvania	YLN4BFCJCP39		
Guilford	YBEQWGFJPMJ3			Union	LHMKBD4AGRJ5	\$ 27,255	\$ 27,255
Halifax	MRL8MYNJ3Y5			Wake	FTJ2WJPLWMJ3		
Harnett	JBDCD9V41BX7			Warren	TLNAU5CNHSU5	\$ 12,655	\$ 12,655
Haywood	DQHZEAV95G5	\$ 11,155	\$ 11,155	Wayne	DACFHCLQKMS1		
Henderson	TG5AR81JLQ5			Wilkes	M14KKHY2NNR3		
Hoke	C1GWSADARX51			Wilson	ME2DJHMYWG55	\$ 11,155	\$ 11,155
Hyde	T2RSYN36NN64			Yadkin	PLCDT7JFA8B1		
Iredell	XTNRLKJLA4S9			Yancey	L98MCUHKC2J8		

UEI = Unique Entity Identifier

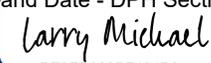
Federal Award Reporting Requirements for Pass-Through Agencies, 2 CFR § 200.331

DPH v1 05-30-24 [ag]

Activity 914	AA	230330 2B0SFLA 200TT00000	Total Allocated	230330 2B0SFLT 200TT00000	Total Allocated	Proposed Total	New Total
Service Period		06/01-05/31		06/01-05/31			
Payment Period		07/01-06/30		07/01-06/30			
01 Alamance		0	\$0.00	0	\$0.00	0	0
D1 Albemarle		0	\$0.00	0	\$0.00	0	0
02 Alexander		0	\$0.00	0	\$0.00	0	0
04 Anson		0	\$0.00	0	\$0.00	0	0
D2 Appalachian		0	\$0.00	0	\$0.00	0	0
07 Beaufort		0	\$0.00	0	\$0.00	0	0
09 Bladen		0	\$0.00	0	\$0.00	0	0
10 Brunswick		0	\$0.00	0	\$0.00	0	0
11 Buncombe		0	\$0.00	0	\$0.00	0	0
12 Burke		0	\$0.00	0	\$0.00	0	0
13 Cabarrus		0	\$0.00	0	\$0.00	0	0
14 Caldwell	* 0	5,463	\$0.00	1,530	\$0.00	6,993	6,993
16 Carteret		0	\$0.00	0	\$0.00	0	0
17 Caswell		0	\$0.00	0	\$0.00	0	0
18 Catawba		0	\$0.00	0	\$0.00	0	0
19 Chatham		0	\$0.00	0	\$0.00	0	0
20 Cherokee		0	\$0.00	0	\$0.00	0	0
22 Clay		0	\$0.00	0	\$0.00	0	0
23 Cleveland		0	\$0.00	0	\$0.00	0	0
24 Columbus		0	\$0.00	0	\$0.00	0	0
25 Craven	* 0	1,837	\$0.00	514	\$0.00	2,351	2,351
26 Cumberland		0	\$0.00	0	\$0.00	0	0
28 Dare		0	\$0.00	0	\$0.00	0	0
29 Davidson	* 0	10,567	\$0.00	2,959	\$0.00	13,526	13,526
30 Davie		0	\$0.00	0	\$0.00	0	0
31 Duplin		0	\$0.00	0	\$0.00	0	0
32 Durham		0	\$0.00	0	\$0.00	0	0
33 Edgecombe		0	\$0.00	0	\$0.00	0	0
D7 Foothills		0	\$0.00	0	\$0.00	0	0
34 Forsyth		0	\$0.00	0	\$0.00	0	0
35 Franklin		0	\$0.00	0	\$0.00	0	0
36 Gaston		0	\$0.00	0	\$0.00	0	0
38 Graham		0	\$0.00	0	\$0.00	0	0
D3 Gran-Vance		0	\$0.00	0	\$0.00	0	0
40 Greene		0	\$0.00	0	\$0.00	0	0
41 Guilford		0	\$0.00	0	\$0.00	0	0
42 Halifax		0	\$0.00	0	\$0.00	0	0
43 Harnett		0	\$0.00	0	\$0.00	0	0
44 Haywood		0	\$0.00	0	\$0.00	0	0
45 Henderson		0	\$0.00	0	\$0.00	0	0
47 Hoke		0	\$0.00	0	\$0.00	0	0
48 Hyde		0	\$0.00	0	\$0.00	0	0
49 Iredell		0	\$0.00	0	\$0.00	0	0
50 Jackson		0	\$0.00	0	\$0.00	0	0

51 Johnston		0	\$0.00	0	\$0.00	0	0
52 Jones		0	\$0.00	0	\$0.00	0	0
53 Lee		0	\$0.00	0	\$0.00	0	0
54 Lenoir		0	\$0.00	0	\$0.00	0	0
55 Lincoln		0	\$0.00	0	\$0.00	0	0
56 Macon		0	\$0.00	0	\$0.00	0	0
57 Madison		0	\$0.00	0	\$0.00	0	0
D4 M-T-W		0	\$0.00	0	\$0.00	0	0
60 Mecklenburg		0	\$0.00	0	\$0.00	0	0
62 Montgomery		0	\$0.00	0	\$0.00	0	0
63 Moore		0	\$0.00	0	\$0.00	0	0
64 Nash		0	\$0.00	0	\$0.00	0	0
65 New Hanover		0	\$0.00	0	\$0.00	0	0
66 Northampton		0	\$0.00	0	\$0.00	0	0
67 Onslow		0	\$0.00	0	\$0.00	0	0
68 Orange		0	\$0.00	0	\$0.00	0	0
69 Pamlico	* 0	2,344	\$0.00	656	\$0.00	3,000	3,000
71 Pender		0	\$0.00	0	\$0.00	0	0
73 Person		0	\$0.00	0	\$0.00	0	0
74 Pitt		0	\$0.00	0	\$0.00	0	0
75 Polk		0	\$0.00	0	\$0.00	0	0
76 Randolph		0	\$0.00	0	\$0.00	0	0
77 Richmond		0	\$0.00	0	\$0.00	0	0
78 Robeson		0	\$0.00	0	\$0.00	0	0
79 Rockingham		0	\$0.00	0	\$0.00	0	0
80 Rowan		0	\$0.00	0	\$0.00	0	0
82 Sampson		0	\$0.00	0	\$0.00	0	0
83 Scotland		0	\$0.00	0	\$0.00	0	0
84 Stanly	* 0	4,107	\$0.00	1,150	\$0.00	5,257	5,257
85 Stokes		0	\$0.00	0	\$0.00	0	0
86 Surry		0	\$0.00	0	\$0.00	0	0
87 Swain		0	\$0.00	0	\$0.00	0	0
D6 Toe River		0	\$0.00	0	\$0.00	0	0
88 Transylvania		0	\$0.00	0	\$0.00	0	0
90 Union	* 0	12,578	\$0.00	3,522	\$0.00	16,100	16,100
92 Wake		0	\$0.00	0	\$0.00	0	0
93 Warren	* 0	1,172	\$0.00	328	\$0.00	1,500	1,500
96 Wayne		0	\$0.00	0	\$0.00	0	0
97 Wilkes		0	\$0.00	0	\$0.00	0	0
98 Wilson		0	\$0.00	0	\$0.00	0	0
99 Yadkin		0	\$0.00	0	\$0.00	0	0
00 Yancey		0	\$0.00	0	\$0.00	0	0
Totals		38,068	0	10,659	0	48,727	48,727

Sign and Date by: DPH Program Administrator
 12/04/24 | 5:55 PM EST

Sign and Date by: DPH Section Chief
 12/04/24 | 7:28 PM EST

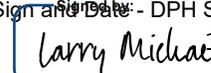
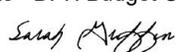
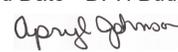
Sign and Date - DPH Budget Office – ATC Coordinator
 12/4/2024

Sign and Date - DPH Budget Officer
 12/05/2024

AH 12/05/24

Activity 914	AA	230330 2B0SFLA 200TT00000	Total Allocated	230330 2B0SFLT 200TT00000	Total Allocated	Proposed Total	New Total
Service Period		06/01-05/31		06/01-05/31			
Payment Period		07/01-06/30		07/01-06/30			
01 Alamance		0	\$0.00	0	\$0.00	0	0
D1 Albemarle		0	\$0.00	0	\$0.00	0	0
02 Alexander		0	\$0.00	0	\$0.00	0	0
04 Anson		0	\$0.00	0	\$0.00	0	0
D2 Appalachian		0	\$0.00	0	\$0.00	0	0
07 Beaufort		0	\$0.00	0	\$0.00	0	0
09 Bladen	* 0	9,708	\$0.00	2,718	\$0.00	12,426	12,426
10 Brunswick		0	\$0.00	0	\$0.00	0	0
11 Buncombe		0	\$0.00	0	\$0.00	0	0
12 Burke		0	\$0.00	0	\$0.00	0	0
13 Cabarrus	* 0	9,708	\$0.00	2,718	\$0.00	12,426	12,426
14 Caldwell	* 0	9,708	\$5,463.00	2,718	\$1,530.00	12,426	19,419
16 Carteret		0	\$0.00	0	\$0.00	0	0
17 Caswell		0	\$0.00	0	\$0.00	0	0
18 Catawba		0	\$0.00	0	\$0.00	0	0
19 Chatham	* 0	9,708	\$0.00	2,718	\$0.00	12,426	12,426
20 Cherokee		0	\$0.00	0	\$0.00	0	0
22 Clay		0	\$0.00	0	\$0.00	0	0
23 Cleveland		0	\$0.00	0	\$0.00	0	0
24 Columbus		0	\$0.00	0	\$0.00	0	0
25 Craven	* 0	9,708	\$1,837.00	2,718	\$514.00	12,426	14,777
26 Cumberland		0	\$0.00	0	\$0.00	0	0
28 Dare		0	\$0.00	0	\$0.00	0	0
29 Davidson	* 0	9,708	\$10,567.00	2,718	\$2,959.00	12,426	25,952
30 Davie		0	\$0.00	0	\$0.00	0	0
31 Duplin		0	\$0.00	0	\$0.00	0	0
32 Durham		0	\$0.00	0	\$0.00	0	0
33 Edgecombe		0	\$0.00	0	\$0.00	0	0
D7 Foothills		0	\$0.00	0	\$0.00	0	0
34 Forsyth		0	\$0.00	0	\$0.00	0	0
35 Franklin		0	\$0.00	0	\$0.00	0	0
36 Gaston		0	\$0.00	0	\$0.00	0	0
38 Graham		0	\$0.00	0	\$0.00	0	0
D3 Gran-Vance		0	\$0.00	0	\$0.00	0	0
40 Greene		0	\$0.00	0	\$0.00	0	0
41 Guilford		0	\$0.00	0	\$0.00	0	0
42 Halifax		0	\$0.00	0	\$0.00	0	0
43 Harnett		0	\$0.00	0	\$0.00	0	0
44 Haywood	* 0	9,708	\$0.00	2,718	\$0.00	12,426	12,426
45 Henderson		0	\$0.00	0	\$0.00	0	0
47 Hoke		0	\$0.00	0	\$0.00	0	0
48 Hyde		0	\$0.00	0	\$0.00	0	0
49 Iredell		0	\$0.00	0	\$0.00	0	0
50 Jackson		0	\$0.00	0	\$0.00	0	0

51 Johnston		0	\$0.00	0	\$0.00	0	0
52 Jones		0	\$0.00	0	\$0.00	0	0
53 Lee		0	\$0.00	0	\$0.00	0	0
54 Lenoir		0	\$0.00	0	\$0.00	0	0
55 Lincoln		0	\$0.00	0	\$0.00	0	0
56 Macon		0	\$0.00	0	\$0.00	0	0
57 Madison		0	\$0.00	0	\$0.00	0	0
D4 M-T-W		0	\$0.00	0	\$0.00	0	0
60 Mecklenburg		0	\$0.00	0	\$0.00	0	0
62 Montgomery		0	\$0.00	0	\$0.00	0	0
63 Moore		0	\$0.00	0	\$0.00	0	0
64 Nash		0	\$0.00	0	\$0.00	0	0
65 New Hanover		0	\$0.00	0	\$0.00	0	0
66 Northampton		0	\$0.00	0	\$0.00	0	0
67 Onslow		0	\$0.00	0	\$0.00	0	0
68 Orange		0	\$0.00	0	\$0.00	0	0
69 Pamlico	* 0	9,708	\$2,344.00	2,718	\$656.00	12,426	15,426
71 Pender	* 0	9,708	\$0.00	2,718	\$0.00	12,426	12,426
73 Person		0	\$0.00	0	\$0.00	0	0
74 Pitt		0	\$0.00	0	\$0.00	0	0
75 Polk		0	\$0.00	0	\$0.00	0	0
76 Randolph	* 0	9,708	\$0.00	2,718	\$0.00	12,426	12,426
77 Richmond		0	\$0.00	0	\$0.00	0	0
78 Robeson		0	\$0.00	0	\$0.00	0	0
79 Rockingham		0	\$0.00	0	\$0.00	0	0
80 Rowan		0	\$0.00	0	\$0.00	0	0
82 Sampson	* 0	9,708	\$0.00	2,718	\$0.00	12,426	12,426
83 Scotland		0	\$0.00	0	\$0.00	0	0
84 Stanly	* 0	9,708	\$4,107.00	2,718	\$1,150.00	12,426	17,683
85 Stokes		0	\$0.00	0	\$0.00	0	0
86 Surry		0	\$0.00	0	\$0.00	0	0
87 Swain		0	\$0.00	0	\$0.00	0	0
D6 Toe River		0	\$0.00	0	\$0.00	0	0
88 Transylvania		0	\$0.00	0	\$0.00	0	0
90 Union	* 0	9,708	\$12,578.00	2,718	\$3,522.00	12,426	28,526
92 Wake		0	\$0.00	0	\$0.00	0	0
93 Warren	* 0	9,708	\$1,172.00	2,718	\$328.00	12,426	13,926
96 Wayne		0	\$0.00	0	\$0.00	0	0
97 Wilkes		0	\$0.00	0	\$0.00	0	0
98 Wilson	* 0	9,708	\$0.00	2,718	\$0.00	12,426	12,426
99 Yadkin		0	\$0.00	0	\$0.00	0	0
00 Yancey		0	\$0.00	0	\$0.00	0	0
Totals		145,620	38,068	40,770	10,659	186,390	235,117

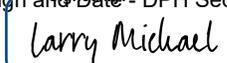
Sign and Date - DPH Program Administrator  12/30/24 5:41 PM EST	Sign and Date - DPH Section Chief  12/30/24 6:48 PM EST
Sign and Date - DPH Budget Office - ATC Coordinator  12/31/2024	Sign and Date - DPH Budget Officer  01/03/2025

ATC 01/03/2025

Activity 914	AA	230330 2B0SFLA 200TT00000	Total Allocated	230330 2B0SFLT 200TT00000	Total Allocated	Proposed Total	New Total
Service Period		06/01-05/31		06/01-05/31			
Payment Period		07/01-06/30		07/01-06/30			
01 Alamance		0	\$0.00	0	\$0.00	0	0
D1 Albemarle		0	\$0.00	0	\$0.00	0	0
02 Alexander		0	\$0.00	0	\$0.00	0	0
04 Anson		0	\$0.00	0	\$0.00	0	0
D2 Appalachian		0	\$0.00	0	\$0.00	0	0
07 Beaufort		0	\$0.00	0	\$0.00	0	0
09 Bladen	* 0	-993	\$9,708.00	-278	\$2,718.00	-1,271	11,155
10 Brunswick		0	\$0.00	0	\$0.00	0	0
11 Buncombe		0	\$0.00	0	\$0.00	0	0
12 Burke		0	\$0.00	0	\$0.00	0	0
13 Cabarrus	* 0	-993	\$9,708.00	-278	\$2,718.00	-1,271	11,155
14 Caldwell	* 0	-6,456	\$15,171.00	-1,808	\$4,248.00	-8,264	11,155
16 Carteret		0	\$0.00	0	\$0.00	0	0
17 Caswell		0	\$0.00	0	\$0.00	0	0
18 Catawba		0	\$0.00	0	\$0.00	0	0
19 Chatham	* 0	4,470	\$9,708.00	1,252	\$2,718.00	5,722	18,148
20 Cherokee		0	\$0.00	0	\$0.00	0	0
22 Clay		0	\$0.00	0	\$0.00	0	0
23 Cleveland		0	\$0.00	0	\$0.00	0	0
24 Columbus	* 0	2,344	\$0.00	656	\$0.00	3,000	3,000
25 Craven	* 0	-993	\$11,545.00	-278	\$3,232.00	-1,271	13,506
26 Cumberland		0	\$0.00	0	\$0.00	0	0
28 Dare		0	\$0.00	0	\$0.00	0	0
29 Davidson	* 0	-993	\$20,275.00	-278	\$5,677.00	-1,271	24,681
30 Davie		0	\$0.00	0	\$0.00	0	0
31 Duplin		0	\$0.00	0	\$0.00	0	0
32 Durham		0	\$0.00	0	\$0.00	0	0
33 Edgecombe		0	\$0.00	0	\$0.00	0	0
D7 Foothills		0	\$0.00	0	\$0.00	0	0
34 Forsyth		0	\$0.00	0	\$0.00	0	0
35 Franklin		0	\$0.00	0	\$0.00	0	0
36 Gaston		0	\$0.00	0	\$0.00	0	0
38 Graham		0	\$0.00	0	\$0.00	0	0
D3 Gran-Vance		0	\$0.00	0	\$0.00	0	0
40 Greene		0	\$0.00	0	\$0.00	0	0
41 Guilford		0	\$0.00	0	\$0.00	0	0
42 Halifax		0	\$0.00	0	\$0.00	0	0
43 Harnett		0	\$0.00	0	\$0.00	0	0
44 Haywood	* 0	-993	\$9,708.00	-278	\$2,718.00	-1,271	11,155
45 Henderson		0	\$0.00	0	\$0.00	0	0
47 Hoke		0	\$0.00	0	\$0.00	0	0
48 Hyde		0	\$0.00	0	\$0.00	0	0
49 Iredell		0	\$0.00	0	\$0.00	0	0
50 Jackson		0	\$0.00	0	\$0.00	0	0

51 Johnston			0	\$0.00	0	\$0.00	0	0
52 Jones			0	\$0.00	0	\$0.00	0	0
53 Lee			0	\$0.00	0	\$0.00	0	0
54 Lenoir			0	\$0.00	0	\$0.00	0	0
55 Lincoln			0	\$0.00	0	\$0.00	0	0
56 Macon			0	\$0.00	0	\$0.00	0	0
57 Madison			0	\$0.00	0	\$0.00	0	0
D4 M-T-W			0	\$0.00	0	\$0.00	0	0
60 Mecklenburg			0	\$0.00	0	\$0.00	0	0
62 Montgomery			0	\$0.00	0	\$0.00	0	0
63 Moore			0	\$0.00	0	\$0.00	0	0
64 Nash			0	\$0.00	0	\$0.00	0	0
65 New Hanover			0	\$0.00	0	\$0.00	0	0
66 Northampton			0	\$0.00	0	\$0.00	0	0
67 Onslow			0	\$0.00	0	\$0.00	0	0
68 Orange	* 0	14,896	\$0.00	4,171	\$0.00	19,067	19,067	
69 Pamlico	* 0	-3,337	\$12,052.00	-934	\$3,374.00	-4,271	11,155	
71 Pender	* 0	-993	\$9,708.00	-278	\$2,718.00	-1,271	11,155	
73 Person		0	\$0.00	0	\$0.00	0	0	
74 Pitt		0	\$0.00	0	\$0.00	0	0	
75 Polk		0	\$0.00	0	\$0.00	0	0	
76 Randolph	* 0	-993	\$9,708.00	-278	\$2,718.00	-1,271	11,155	
77 Richmond		0	\$0.00	0	\$0.00	0	0	
78 Robeson		0	\$0.00	0	\$0.00	0	0	
79 Rockingham		0	\$0.00	0	\$0.00	0	0	
80 Rowan		0	\$0.00	0	\$0.00	0	0	
82 Sampson	* 0	-993	\$9,708.00	-278	\$2,718.00	-1,271	11,155	
83 Scotland		0	\$0.00	0	\$0.00	0	0	
84 Stanly	* 0	-993	\$13,815.00	-278	\$3,868.00	-1,271	16,412	
85 Stokes		0	\$0.00	0	\$0.00	0	0	
86 Surry		0	\$0.00	0	\$0.00	0	0	
87 Swain		0	\$0.00	0	\$0.00	0	0	
D6 Toe River		0	\$0.00	0	\$0.00	0	0	
88 Transylvania		0	\$0.00	0	\$0.00	0	0	
90 Union	* 0	-993	\$22,286.00	-278	\$6,240.00	-1,271	27,255	
92 Wake		0	\$0.00	0	\$0.00	0	0	
93 Warren	* 0	-993	\$10,880.00	-278	\$3,046.00	-1,271	12,655	
96 Wayne		0	\$0.00	0	\$0.00	0	0	
97 Wilkes		0	\$0.00	0	\$0.00	0	0	
98 Wilson	* 0	-993	\$9,708.00	-278	\$2,718.00	-1,271	11,155	
99 Yadkin		0	\$0.00	0	\$0.00	0	0	
00 Yancey		0	\$0.00	0	\$0.00	0	0	
Totals		1	183,688	1	51,429	2	235,119	

Sign and Date - DPH Program Administrator
 01/28/25 | 8:42 PM EST

Sign and Date - DPH Section Chief
 01/28/25 | 8:44 PM EST

Sign and Date - DPH Budget Office - ATC Coordinator
 1/29/2025

Sign and Date - DPH Budget Officer
 2/3/2025

Ad 01/31/2025

**Special Revenue Ordinance 92A
for AA914 (ARPA Funds)
Addressing Lead in Water and Lead-Based Paint in Public School and Child Care Facilities**

BE IT ORDAINED by the Board of County Commissioners of Union County, North Carolina that, pursuant to Section 13.2 of Chapter 159 of the General Statutes of North Carolina, the following special revenue project ordinance is hereby adopted:

Section 1: This ordinance is to budget expenditures to be ARPA AA 914 originally established for FY 2024 and FY 2025 only, but it has been extended to FY 2026.

Section 2: The officers of this unit are hereby directed to proceed with the ARPA AA 914 funding project within the terms of the guidelines as set forth by the federal and state government, Generally Accepted Accounting Principles (GAAP) and the budget contained herein.

Section 3: The following amounts are appropriated for the projects and authorized for expenditures:

Expenditure Funds:	
Operating Expenses	<u>\$52,745</u>
TOTAL EXPENDITURES	\$52,745

Section 4: The following revenues are anticipated to be available to complete the project:

Revenue Funds:	
Federal ARPA Grant Funding	<u>\$52,745</u>
TOTAL REVENUES	\$52,745

Section 5: The Finance Officer is hereby directed to maintain sufficient specific detailed accounting records.

Section 6: Copies of this special revenue ordinance shall be furnished to the Budget Officer, the Finance Officer and to the Clerk to the Board of County Commissioners.

Section 7: At the completion of this special revenue ordinance the Finance Officer is hereby directed to close out the Special Revenue Ordinance.

Section 8: The County Manager is hereby authorized to transfer revenues and appropriations within an ordinance as contained herein.

ATTEST:

Lynn G. West,
Clerk to the Board

Melissa Merrell, Chair
Union County Board of Commissioners

**SPECIAL REVENUE ORDINANCE AMENDMENT
COUNTY MANAGER APPROVED**

BUDGET General SRO Fund REQUESTED BY Traci Colley
 FISCAL YEAR FY 2025-2026 DATE _____

PROJECT SOURCES				PROJECT USES			
Source Description and Code	Project To Date	Requested Amendment	Revised Project	Project Description and Code	Project To Date	Requested Amendment	Revised Project
Federal Grant	25,490.00	27,255	52,745	Operating Expenses	25,490.00	27,255	52,745
			-				-
					-		
							-
	25,490.00	27,255	52,745		25,490	27,255	52,745

EXPLANATION: To recognize and appropriate funding from Federal ARPA passed through NC State Award for Lead and Asbestio Programs.
Originally for Fiscal years 2024 and 2025 only, but has been extended to 2026.
This is reimbursement based funding.

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

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES				PROJECT USES			
Source Description and Code	Project To Date	Requested Amendment	Revised Project	Project Description and Code	Project To Date	Requested Amendment	Revised Project
30030543-4321-10053 Fed Grant	25,490.00	27,255	52,745	30030543-5381-10053	25,490.00	27,255	52,745
	25,490.00	27,255	52,745		25,490	27,255	52,745

Prepared By MEG
 Posted By _____
 Date _____ Number SRO 92A



Union County, NC

Staff Report

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

File #: 25-579

Agenda Date: 10/6/2025

TITLE:

Tax Bill Correction Report for August 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve Tax Bill Correction Reports for August 2025.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

August Refund amount = \$10,249.90

Correction Listing Report

Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : Exclusion Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted	Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000202	02030025	RE	2024	LEVINER, JOSEPH DARRELL II & LEVINER, SUSAN ASHCRAFT	8/19/2025	Value	68,700	93,700	25,000	EXCLUSION STATUS CHANGE
Public Notes:						Tax	454.52	619.92	165.40	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	454.52	619.92	165.40	
2025000202	02030025	RE	2023	LEVINER, JOSEPH DARRELL II & LEVINER, SUSAN ASHCRAFT	8/19/2025	Value	68,700	93,700	25,000	EXCLUSION STATUS CHANGE
Public Notes:						Tax	450.05	613.83	163.78	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	450.05	613.83	163.78	
2025000198	04069005	RE	2024	DAVIS, THOMAS H HEIRS	8/19/2025	Value	63,830	114,300	50,470	EXCLUSION STATUS CHANGE
Public Notes:						Tax	407.75	730.15	322.40	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	407.75	730.15	322.40	
2025000230	08153015	RE	2024	HUGGINS, BOBBIE MICHELLE P	8/22/2025	Value	332,873	436,500	103,627	EXCLUSION STATUS CHANGE
Public Notes:						Tax	2,225.25	2,918.00	692.75	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	2,225.25	2,918.00	692.75	
2025000230	08153015	RE	2023	HUGGINS, BOBBIE MICHELLE P	8/22/2025	Value	332,873	436,500	103,627	EXCLUSION STATUS CHANGE
Public Notes:						Tax	2,191.30	2,873.48	682.18	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	2,191.30	2,873.48	682.18	
2025000230	08153015	RE	2022	HUGGINS, BOBBIE MICHELLE P	8/22/2025	Value	332,873	436,500	103,627	EXCLUSION STATUS CHANGE
Public Notes:						Tax	2,191.30	2,873.48	682.18	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	2,191.30	2,873.48	682.18	

Correction Listing Report

Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : Exclusion Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000230	08153015	RE	2021	HUGGINS, BOBBIE MICHELLE P	8/22/2025	Value	332,873	436,500	103,627		EXCLUSION STATUS CHANGE
Public Notes:						Tax	2,193.64	2,876.54	682.90		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,193.64	2,876.54	682.90	0.00	
2025000230	08153015	RE	2020	HUGGINS, BOBBIE MICHELLE P	8/22/2025	Value	247,587	311,700	64,113		EXCLUSION STATUS CHANGE
Public Notes:						Tax	1,987.13	2,501.70	514.57		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,987.13	2,501.70	514.57	0.00	
2025000287	09022071	RE	2025	PARKER, MILDRED C & PARKER, WILLIAM L	8/26/2025	Value	102,100	124,250	22,150		EXCLUSION STATUS CHANGE
Public Notes:						Tax	771.98	939.46	167.48		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	771.98	939.46	167.48	0.00	
2025000237	09298057	RE	2025	SARLOVSKA, JELENA	8/22/2025	Value	49,775	86,675	36,900		EXCLUSION STATUS CHANGE
Public Notes:						Tax	435.13	757.71	322.58		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	435.13	757.71	322.58	0.00	
2025000203	306005	PP	2024	ASHCRAFT, WILLIE EMOGENE H	8/19/2025	Value	0	5,269	5,269		EXCLUSION STATUS CHANGE
Public Notes:						Tax	0.00	34.86	34.86		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	34.86	34.86	0.00	

Correction Listing Report

Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : Exclusion Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000203	306005	PP	2023	ASHCRAFT, WILLIE EMOGENE H	8/19/2025	Value	0	5,269	5,269		EXCLUSION STATUS CHANGE
Public Notes:						Tax	0.00	34.52	34.52		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	34.52	34.52	0.00	
Totals for Type Exclusion Change - Discovery :						Value	1,932,184	2,580,863	648,679		
						Tax	13,308.05	17,773.65	4,465.60		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	13,308.05	17,773.65	4,465.60	0.00	

Correction Type : Exclusion Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000232	03144018A	RE	2025	RICHMOND, KARLA	8/22/2025	Value	208,600	107,769	(100,831)		EXCLUSION STATUS CHANGE
Public Notes:						Tax	1,040.50	537.55	(502.95)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,040.50	537.55	(502.95)	0.00	
2025000233	04255029	RE	2025	COLANGELO, MATTHEW JON	8/22/2025	Value	741,500	696,500	(45,000)		EXCLUSION STATUS CHANGE
Public Notes:						Tax	3,417.57	3,210.16	(207.41)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,417.57	3,210.16	(207.41)	0.00	

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Date Posted between 8/1/2025 and 8/31/2025

Correction Type : Exclusion Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000135	07054250	RE	2025	MCCRIMMON, MARTHA W	8/13/2025	Value	194,600	216,050	21,450		EXCLUSION STATUS CHANGE
Public Notes:						Tax	1,295.84	1,438.67	142.83		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,295.84	1,438.67	142.83	0.00	
2025000231	07130095	RE	2025	BRADLEY, RHONDA M	8/22/2025	Value	309,100	154,550	(154,550)		EXCLUSION STATUS CHANGE
Public Notes:						Tax	2,069.12	1,034.56	(1,034.56)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,069.12	1,034.56	(1,034.56)	0.00	
2025000308	09247006	RE	2025	CHARO, MARTHA S & CHARO, TIMOTHY O	8/27/2025	Value	320,000	160,000	(160,000)		EXCLUSION STATUS CHANGE
Public Notes:						Tax	1,444.80	722.40	(722.40)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,444.80	722.40	(722.40)	0.00	
Totals for Type Exclusion Change - Release :						Value	1,773,800	1,334,869	(438,931)		
						Tax	9,267.83	6,943.34	(2,324.49)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,267.83	6,943.34	(2,324.49)	0.00	

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Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000062	01066020	RE	2025	NEEDHAM, CYNTHIA JANE MCGE & NEEDHAM, CARL LEE	8/1/2025	Value	340,500	360,520	20,020		PUV ROLLBACK
						Tax	1,721.23	1,822.43	101.20		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,721.23	1,822.43	101.20	0.00	
2025000062	01066020	RE	2024	NEEDHAM, CYNTHIA JANE MCGE & NEEDHAM, CARL LEE	8/1/2025	Value	239,400	248,770	9,370		PUV ROLLBACK
						Tax	1,548.44	1,609.05	60.61		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	3.94	3.94		
						Tax TTL	1,548.44	1,612.99	64.55	0.00	
2025000062	01066020	RE	2023	NEEDHAM, CYNTHIA JANE MCGE & NEEDHAM, CARL LEE	8/1/2025	Value	239,400	248,770	9,370		PUV ROLLBACK
						Tax	1,499.60	1,558.29	58.69		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	9.09	9.09		
						Tax TTL	1,499.60	1,567.38	67.78	0.00	
2025000062	01066020	RE	2022	NEEDHAM, CYNTHIA JANE MCGE & NEEDHAM, CARL LEE	8/1/2025	Value	239,400	248,770	9,370		PUV ROLLBACK
						Tax	1,499.60	1,558.29	58.69		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	14.38	14.38		
						Tax TTL	1,499.60	1,572.67	73.07	0.00	
2025000064	01096004G	RE	2024	WILLIAMS, DAWN & WILLIAMS, RANDY MAX	8/1/2025	Value	7,000	14,580	7,580		PUV ROLLBACK
						Tax	45.28	94.31	49.03		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	3.55	3.55		
						Tax TTL	45.28	97.86	52.58	0.00	
2025000064	01096004G	RE	2023	WILLIAMS, DAWN & WILLIAMS, RANDY MAX	8/1/2025	Value	7,000	14,580	7,580		PUV ROLLBACK
						Tax	43.85	91.33	47.48		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	7.72	7.72		
						Tax TTL	43.85	99.05	55.20	0.00	

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Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000064	01096004G	RE	2022	WILLIAMS, DAWN & WILLIAMS, RANDY MAX	8/1/2025	Value	7,000	14,580	7,580		PUV ROLLBACK
Public Notes:						Tax	43.85	91.33	47.48		
						LL	0.00	0.00	0.00		
						INT	0.00	11.99	11.99		
						Tax TTL	43.85	103.32	59.47	0.00	
2025000288	01114018	RE	2025	CROWDER, LINDA LEE TRUSTEE & CROWDER, JAMES WARREN T	8/26/2025	Value	12,100	166,600	154,500		PUV ROLLBACK
Public Notes:						Tax	61.16	842.16	781.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	61.16	842.16	781.00	0.00	
2025000288	01114018	RE	2024	CROWDER, LINDA LEE TRUSTEE & CROWDER, JAMES WARREN T	8/26/2025	Value	12,100	73,870	61,770		PUV ROLLBACK
Public Notes:						Tax	78.26	477.79	399.53		
						LL	0.00	0.00	0.00		
						INT	0.00	28.97	28.97		
						Tax TTL	78.26	506.76	428.50	0.00	
2025000288	01114018	RE	2023	CROWDER, LINDA LEE TRUSTEE & CROWDER, JAMES WARREN T	8/26/2025	Value	12,100	73,870	61,770		PUV ROLLBACK
Public Notes:						Tax	75.79	462.72	386.93		
						LL	0.00	0.00	0.00		
						INT	0.00	62.88	62.88		
						Tax TTL	75.79	525.60	449.81	0.00	
2025000288	01114018	RE	2022	CROWDER, LINDA LEE TRUSTEE & CROWDER, JAMES WARREN T	8/26/2025	Value	12,100	73,870	61,770		PUV ROLLBACK
Public Notes:						Tax	75.79	462.72	386.93		
						LL	0.00	0.00	0.00		
						INT	0.00	97.70	97.70		
						Tax TTL	75.79	560.42	484.63	0.00	
2025000063	01120013B	RE	2024	BALL, MICHAEL S	8/1/2025	Value	5,400	12,660	7,260		PUV ROLLBACK
Public Notes:						Tax	34.93	81.89	46.96		
						LL	0.00	0.00	0.00		
						INT	0.00	3.41	3.41		
						Tax TTL	34.93	85.30	50.37	0.00	

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Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000063	01120013B	RE	2023	BALL, MICHAEL S	8/1/2025	Value	5,400	12,660	7,260		PUV ROLLBACK
Public Notes:						Tax	33.82	79.30	45.48		
						LL	0.00	0.00	0.00		
						INT	0.00	7.39	7.39		
						Tax TTL	33.82	86.69	52.87	0.00	
2025000063	01120013B	RE	2022	BALL, MICHAEL S	8/1/2025	Value	5,400	12,660	7,260		PUV ROLLBACK
Public Notes:						Tax	33.82	79.30	45.48		
						LL	0.00	0.00	0.00		
						INT	0.00	11.48	11.48		
						Tax TTL	33.82	90.78	56.96	0.00	
2025000147	02089021	RE	2025	LOWE, MARK T TRUSTEE ET AL & LOWE, MARK T TRUSTEE	8/14/2025	Value	93,700	1,212,500	1,118,800		PUV ROLLBACK
Public Notes:						Tax	469.62	6,077.05	5,607.43		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	469.62	6,077.05	5,607.43	0.00	
2025000147	02089021	RE	2024	LOWE, MARK T TRUSTEE ET AL & LOWE, MARK T TRUSTEE	8/14/2025	Value	63,500	565,100	501,600		PUV ROLLBACK
Public Notes:						Tax	420.11	3,738.70	3,318.59		
						LL	0.00	0.00	0.00		
						INT	0.00	240.60	240.60		
						Tax TTL	420.11	3,979.30	3,559.19	0.00	
2025000147	02089021	RE	2023	LOWE, MARK T TRUSTEE ET AL & LOWE, MARK T TRUSTEE	8/14/2025	Value	63,500	565,100	501,600		PUV ROLLBACK
Public Notes:						Tax	415.99	3,701.97	3,285.98		
						LL	0.00	0.00	0.00		
						INT	0.00	533.97	533.97		
						Tax TTL	415.99	4,235.94	3,819.95	0.00	
2025000147	02089021	RE	2022	LOWE, MARK T TRUSTEE ET AL & LOWE, MARK T TRUSTEE	8/14/2025	Value	63,500	565,100	501,600		PUV ROLLBACK
Public Notes:						Tax	415.99	3,701.97	3,285.98		
						LL	0.00	0.00	0.00		
						INT	0.00	829.71	829.71		
						Tax TTL	415.99	4,531.68	4,115.69	0.00	

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Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000146	02089021A	RE	2025	LOWE, MARK T TRUSTEE ET AL & LOWE, MARK T TRUSTEE	8/14/2025	Value	5,000	215,700	210,700		PUV ROLLBACK
Public Notes:						Tax	25.06	1,081.09	1,056.03		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	25.06	1,081.09	1,056.03	0.00	
2025000146	02089021A	RE	2024	LOWE, MARK T TRUSTEE ET AL & LOWE, MARK T TRUSTEE	8/14/2025	Value	4,800	96,600	91,800		PUV ROLLBACK
Public Notes:						Tax	31.76	639.11	607.35		
						LL	0.00	0.00	0.00		
						INT	0.00	44.04	44.04		
						Tax TTL	31.76	683.15	651.39	0.00	
2025000146	02089021A	RE	2023	LOWE, MARK T TRUSTEE ET AL & LOWE, MARK T TRUSTEE	8/14/2025	Value	4,800	96,600	91,800		PUV ROLLBACK
Public Notes:						Tax	31.45	632.83	601.38		
						LL	0.00	0.00	0.00		
						INT	0.00	97.73	97.73		
						Tax TTL	31.45	730.56	699.11	0.00	
2025000146	02089021A	RE	2022	LOWE, MARK T TRUSTEE ET AL & LOWE, MARK T TRUSTEE	8/14/2025	Value	4,800	96,600	91,800		PUV ROLLBACK
Public Notes:						Tax	31.45	632.83	601.38		
						LL	0.00	0.00	0.00		
						INT	0.00	151.85	151.85		
						Tax TTL	31.45	784.68	753.23	0.00	
2025000070	02105019A	RE	2025	EDWARDS, PATTI G & EDWARDS, ROBERT P	8/4/2025	Value	307,800	386,700	78,900		PUV ROLLBACK
Public Notes:						Tax	1,542.69	1,938.14	395.45		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,542.69	1,938.14	395.45	0.00	
2025000070	02105019A	RE	2024	EDWARDS, PATTI G & EDWARDS, ROBERT P	8/4/2025	Value	268,100	301,100	33,000		PUV ROLLBACK
Public Notes:						Tax	1,773.75	1,992.08	218.33		
						LL	0.00	0.00	0.00		
						INT	0.00	15.83	15.83		
						Tax TTL	1,773.75	2,007.91	234.16	0.00	

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Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000070	02105019A	RE	2023	EDWARDS, PATTI G & EDWARDS, ROBERT P	8/4/2025	Value	268,100	301,100	33,000		PUV ROLLBACK
						Tax	1,756.32	1,972.50	216.18		
						LL	0.00	0.00	0.00		
						INT	0.00	35.13	35.13		
						Tax TTL	1,756.32	2,007.63	251.31	0.00	
2025000070	02105019A	RE	2022	EDWARDS, PATTI G & EDWARDS, ROBERT P	8/4/2025	Value	268,100	301,100	33,000		PUV ROLLBACK
						Tax	1,756.32	1,972.50	216.18		
						LL	0.00	0.00	0.00		
						INT	0.00	54.58	54.58		
						Tax TTL	1,756.32	2,027.08	270.76	0.00	
2025000066	02111009	RE	2025	CUSTER, BARBARA PATTON & CUSTER, JEREMY A	8/1/2025	Value	7,600	42,700	35,100		PUV ROLLBACK
						Tax	38.09	214.01	175.92		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	38.09	214.01	175.92	0.00	
2025000066	02111009	RE	2024	CUSTER, BARBARA PATTON & CUSTER, JEREMY A	8/1/2025	Value	9,800	24,900	15,100		PUV ROLLBACK
						Tax	64.84	164.74	99.90		
						LL	0.00	0.00	0.00		
						INT	0.00	7.24	7.24		
						Tax TTL	64.84	171.98	107.14	0.00	
2025000066	02111009	RE	2023	CUSTER, BARBARA PATTON & CUSTER, JEREMY A	8/1/2025	Value	9,800	12,900	3,100		PUV ROLLBACK
						Tax	64.20	84.51	20.31		
						LL	0.00	0.00	0.00		
						INT	0.00	3.30	3.30		
						Tax TTL	64.20	87.81	23.61	0.00	
2025000066	02111009	RE	2022	CUSTER, BARBARA PATTON & CUSTER, JEREMY A	8/1/2025	Value	9,800	12,900	3,100		PUV ROLLBACK
						Tax	64.20	84.51	20.31		
						LL	0.00	0.00	0.00		
						INT	0.00	5.13	5.13		
						Tax TTL	64.20	89.64	25.44	0.00	

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Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000145	02303005	RE	2025	C W HORNE FAMILY LIMITED P	8/14/2025	Value	5,000	156,500	151,500		PUV ROLLBACK
Public Notes:						Tax	25.06	784.38	759.32		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	25.06	784.38	759.32	0.00	
2025000145	02303005	RE	2024	C W HORNE FAMILY LIMITED P	8/14/2025	Value	5,000	79,800	74,800		PUV ROLLBACK
Public Notes:						Tax	33.08	527.96	494.88		
						LL	0.00	0.00	0.00		
						INT	0.00	35.88	35.88		
						Tax TTL	33.08	563.84	530.76	0.00	
2025000145	02303005	RE	2023	C W HORNE FAMILY LIMITED P	8/14/2025	Value	5,000	79,800	74,800		PUV ROLLBACK
Public Notes:						Tax	32.76	522.77	490.01		
						LL	0.00	0.00	0.00		
						INT	0.00	79.63	79.63		
						Tax TTL	32.76	602.40	569.64	0.00	
2025000145	02303005	RE	2022	C W HORNE FAMILY LIMITED P	8/14/2025	Value	5,000	79,800	74,800		PUV ROLLBACK
Public Notes:						Tax	32.76	522.77	490.01		
						LL	0.00	0.00	0.00		
						INT	0.00	123.73	123.73		
						Tax TTL	32.76	646.50	613.74	0.00	
2025000149	02303050 82	RE	2025	SKYLAR KIMBERLYN HORNE TRU & CRESFUL WILLIAM HORNE I	8/14/2025	Value	11,000	248,900	237,900		PUV ROLLBACK
Public Notes:						Tax	106.84	2,417.32	2,310.48		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	106.84	2,417.32	2,310.48	0.00	
2025000149	02303050 82	RE	2024	SKYLAR KIMBERLYN HORNE TRU & CRESFUL WILLIAM HORNE I	8/14/2025	Value	11,000	132,800	121,800		PUV ROLLBACK
Public Notes:						Tax	133.27	1,609.00	1,475.73		
						LL	0.00	0.00	0.00		
						INT	0.00	106.99	106.99		
						Tax TTL	133.27	1,715.99	1,582.72	0.00	

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Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000149	02303050 82	RE	2023	SKYLAR KIMBERLYN HORNE TRU & CRESFUL WILLIAM HORNE I	8/14/2025	Value	11,000	132,800	121,800		PUV ROLLBACK
						Tax	125.96	1,520.69	1,394.73		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	226.64	226.64		
						Tax TTL	125.96	1,747.33	1,621.37	0.00	
2025000149	02303050 82	RE	2022	SKYLAR KIMBERLYN HORNE TRU & CRESFUL WILLIAM HORNE I	8/14/2025	Value	11,000	132,800	121,800		PUV ROLLBACK
						Tax	125.96	1,520.69	1,394.73		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	352.16	352.16		
						Tax TTL	125.96	1,872.85	1,746.89	0.00	
2025000148	02303050 92	RE	2025	CRESFUL WILLIAM HORNE III & SKYLAR KIMBERLYN HORNE	8/14/2025	Value	12,300	332,000	319,700		PUV ROLLBACK
						Tax	61.64	1,663.98	1,602.34		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	61.64	1,663.98	1,602.34	0.00	
2025000148	02303050 92	RE	2024	CRESFUL WILLIAM HORNE III & SKYLAR KIMBERLYN HORNE	8/14/2025	Value	12,200	173,400	161,200		PUV ROLLBACK
						Tax	80.71	1,147.21	1,066.50		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	77.32	77.32		
						Tax TTL	80.71	1,224.53	1,143.82	0.00	
2025000148	02303050 92	RE	2023	CRESFUL WILLIAM HORNE III & SKYLAR KIMBERLYN HORNE	8/14/2025	Value	12,200	173,400	161,200		PUV ROLLBACK
						Tax	79.92	1,135.94	1,056.02		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	171.60	171.60		
						Tax TTL	79.92	1,307.54	1,227.62	0.00	
2025000148	02303050 92	RE	2022	CRESFUL WILLIAM HORNE III & SKYLAR KIMBERLYN HORNE	8/14/2025	Value	12,200	173,400	161,200		PUV ROLLBACK
						Tax	79.92	1,135.94	1,056.02		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	266.64	266.64		
						Tax TTL	79.92	1,402.58	1,322.66	0.00	

Correction Listing Report

Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000144	02303055A	RE	2025	C W HORNE FAMILY LIMITED P	8/14/2025	Value	900	246,000	245,100		PUV ROLLBACK
Public Notes:						Tax	8.74	2,389.15	2,380.41		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8.74	2,389.15	2,380.41	0.00	
2025000144	02303055A	RE	2024	C W HORNE FAMILY LIMITED P	8/14/2025	Value	900	76,700	75,800		PUV ROLLBACK
Public Notes:						Tax	10.91	929.30	918.39		
						LL	0.00	0.00	0.00		
						INT	0.00	66.59	66.59		
						Tax TTL	10.91	995.89	984.98	0.00	
2025000144	02303055A	RE	2023	C W HORNE FAMILY LIMITED P	8/14/2025	Value	900	76,700	75,800		PUV ROLLBACK
Public Notes:						Tax	10.30	878.29	867.99		
						LL	0.00	0.00	0.00		
						INT	0.00	141.05	141.05		
						Tax TTL	10.30	1,019.34	1,009.04	0.00	
2025000144	02303055A	RE	2022	C W HORNE FAMILY LIMITED P	8/14/2025	Value	900	76,700	75,800		PUV ROLLBACK
Public Notes:						Tax	10.30	878.29	867.99		
						LL	0.00	0.00	0.00		
						INT	0.00	219.17	219.17		
						Tax TTL	10.30	1,097.46	1,087.16	0.00	
2025000143	02303057B	RE	2025	C W HORNE FAMILY LIMITED P	8/14/2025	Value	70,800	5,868,500	5,797,700		PUV ROLLBACK
Public Notes:						Tax	354.85	29,412.92	29,058.07		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	354.85	29,412.92	29,058.07	0.00	
2025000143	02303057B	RE	2024	C W HORNE FAMILY LIMITED P	8/14/2025	Value	70,200	1,206,000	1,135,800		PUV ROLLBACK
Public Notes:						Tax	464.45	7,978.90	7,514.45		
						LL	0.00	0.00	0.00		
						INT	0.00	544.80	544.80		
						Tax TTL	464.45	8,523.70	8,059.25	0.00	

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Date Posted between 8/1/2025 and 8/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000143	02303057B	RE	2023	C W HORNE FAMILY LIMITED P	8/14/2025	Value	70,200	1,206,000	1,135,800		PUV ROLLBACK
Public Notes:						Tax	459.88	7,900.51	7,440.63		
						LL	0.00	0.00	0.00		
						INT	0.00	1,209.10	1,209.10		
						Tax TTL	459.88	9,109.61	8,649.73	0.00	
2025000143	02303057B	RE	2022	C W HORNE FAMILY LIMITED P	8/14/2025	Value	70,200	1,206,000	1,135,800		PUV ROLLBACK
Public Notes:						Tax	459.88	7,900.51	7,440.63		
						LL	0.00	0.00	0.00		
						INT	0.00	1,878.76	1,878.76		
						Tax TTL	459.88	9,779.27	9,319.39	0.00	
2025000150	03126038	RE	2025	SAUCIUC, WALTER & SAUCIUC, JULIANA	8/15/2025	Value	1,065,500	1,093,030	27,530		PUV ROLLBACK
Public Notes:						Tax	5,314.72	5,452.04	137.32		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,314.72	5,452.04	137.32	0.00	
2025000150	03126038	RE	2024	SAUCIUC, WALTER & SAUCIUC, JULIANA	8/15/2025	Value	890,700	905,310	14,610		PUV ROLLBACK
Public Notes:						Tax	5,949.87	6,047.46	97.59		
						LL	0.00	0.00	0.00		
						INT	0.00	7.07	7.07		
						Tax TTL	5,949.87	6,054.53	104.66	0.00	
2025000150	03126038	RE	2023	SAUCIUC, WALTER & SAUCIUC, JULIANA	8/15/2025	Value	890,700	905,310	14,610		PUV ROLLBACK
Public Notes:						Tax	5,851.01	5,946.98	95.97		
						LL	0.00	0.00	0.00		
						INT	0.00	15.60	15.60		
						Tax TTL	5,851.01	5,962.58	111.57	0.00	
2025000150	03126038	RE	2022	SAUCIUC, WALTER & SAUCIUC, JULIANA	8/15/2025	Value	890,700	905,310	14,610		PUV ROLLBACK
Public Notes:						Tax	5,851.01	5,946.98	95.97		
						LL	0.00	0.00	0.00		
						INT	0.00	24.23	24.23		
						Tax TTL	5,851.01	5,971.21	120.20	0.00	

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Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000151	03126038A	RE	2025	SAUCIUC, JULIANA & SAUCIUC, WALTER	8/15/2025	Value	4,200	25,760	21,560		PUV ROLLBACK
						Tax	20.94	128.48	107.54		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	20.94	128.48	107.54	0.00	
Public Notes:											
2025000151	03126038A	RE	2024	SAUCIUC, JULIANA & SAUCIUC, WALTER	8/15/2025	Value	4,200	14,310	10,110		PUV ROLLBACK
						Tax	28.06	95.59	67.53		
						LL	0.00	0.00	0.00		
						INT	0.00	4.90	4.90		
						Tax TTL	28.06	100.49	72.43	0.00	
Public Notes:											
2025000151	03126038A	RE	2023	SAUCIUC, JULIANA & SAUCIUC, WALTER	8/15/2025	Value	4,200	14,310	10,110		PUV ROLLBACK
						Tax	27.59	94.00	66.41		
						LL	0.00	0.00	0.00		
						INT	0.00	10.79	10.79		
						Tax TTL	27.59	104.79	77.20	0.00	
Public Notes:											
2025000151	03126038A	RE	2022	SAUCIUC, JULIANA & SAUCIUC, WALTER	8/15/2025	Value	4,200	14,310	10,110		PUV ROLLBACK
						Tax	27.59	94.00	66.41		
						LL	0.00	0.00	0.00		
						INT	0.00	16.77	16.77		
						Tax TTL	27.59	110.77	83.18	0.00	
Public Notes:											
2025000069	04198015	RE	2025	BRANTLEY, CHANCE STEVEN	8/1/2025	Value	13,300	372,100	358,800		PUV ROLLBACK
						Tax	61.30	1,715.01	1,653.71		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	61.30	1,715.01	1,653.71	0.00	
Public Notes:											
2025000069	04198015	RE	2024	BRANTLEY, CHANCE STEVEN	8/1/2025	Value	13,300	197,700	184,400		PUV ROLLBACK
						Tax	83.14	1,235.82	1,152.68		
						LL	0.00	0.00	0.00		
						INT	0.00	83.57	83.57		
						Tax TTL	83.14	1,319.39	1,236.25	0.00	
Public Notes:											

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Date Posted between 8/1/2025 and 8/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000069	04198015	RE	2023	BRANTLEY, CHANCE STEVEN	8/1/2025	Value	13,300	197,700	184,400		PUV ROLLBACK
Public Notes:						Tax	82.58	1,227.52	1,144.94		
						LL	0.00	0.00	0.00		
						INT	0.00	186.05	186.05		
						Tax TTL	82.58	1,413.57	1,330.99	0.00	
2025000069	04198015	RE	2022	BRANTLEY, CHANCE STEVEN	8/1/2025	Value	13,300	197,700	184,400		PUV ROLLBACK
Public Notes:						Tax	82.58	1,227.52	1,144.94		
						LL	0.00	0.00	0.00		
						INT	0.00	289.10	289.10		
						Tax TTL	82.58	1,516.62	1,434.04	0.00	
2025000073	04237008	RE	2025	BELK, MYRA JILL ELLIS	8/6/2025	Value	5,200	135,500	130,300		PUV ROLLBACK
Public Notes:						Tax	23.97	624.52	600.55		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	23.97	624.52	600.55	0.00	
2025000073	04237008	RE	2024	BELK, MYRA JILL ELLIS	8/6/2025	Value	5,200	53,900	48,700		PUV ROLLBACK
Public Notes:						Tax	32.51	336.93	304.42		
						LL	0.00	0.00	0.00		
						INT	0.00	22.07	22.07		
						Tax TTL	32.51	359.00	326.49	0.00	
2025000073	04237008	RE	2023	BELK, MYRA JILL ELLIS	8/6/2025	Value	5,200	53,900	48,700		PUV ROLLBACK
Public Notes:						Tax	32.29	334.67	302.38		
						LL	0.00	0.00	0.00		
						INT	0.00	49.14	49.14		
						Tax TTL	32.29	383.81	351.52	0.00	
2025000073	04237008	RE	2022	BELK, MYRA JILL ELLIS	8/6/2025	Value	5,200	53,900	48,700		PUV ROLLBACK
Public Notes:						Tax	32.29	334.67	302.38		
						LL	0.00	0.00	0.00		
						INT	0.00	76.35	76.35		
						Tax TTL	32.29	411.02	378.73	0.00	

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Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000080	05072005C	RE	2025	IVEY, MITCHELL	8/8/2025	Value	8,200	321,240	313,040		PUV ROLLBACK
Public Notes:						Tax	39.26	1,538.10	1,498.84		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	39.26	1,538.10	1,498.84	0.00	
2025000080	05072005C	RE	2024	IVEY, MITCHELL	8/8/2025	Value	7,700	118,670	110,970		PUV ROLLBACK
Public Notes:						Tax	49.14	757.35	708.21		
						LL	0.00	0.00	0.00		
						INT	0.00	51.34	51.34		
						Tax TTL	49.14	808.69	759.55	0.00	
2025000080	05072005C	RE	2023	IVEY, MITCHELL	8/8/2025	Value	7,700	118,670	110,970		PUV ROLLBACK
Public Notes:						Tax	48.35	745.13	696.78		
						LL	0.00	0.00	0.00		
						INT	0.00	113.23	113.23		
						Tax TTL	48.35	858.36	810.01	0.00	
2025000080	05072005C	RE	2022	IVEY, MITCHELL	8/8/2025	Value	7,700	118,670	110,970		PUV ROLLBACK
Public Notes:						Tax	48.35	745.13	696.78		
						LL	0.00	0.00	0.00		
						INT	0.00	175.94	175.94		
						Tax TTL	48.35	921.07	872.72	0.00	
2025000068	05141004	RE	2025	MCLAUGHLIN, SAMUEL BRYCE	8/1/2025	Value	6,100	16,970	10,870		PUV ROLLBACK
Public Notes:						Tax	29.29	81.49	52.20		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	29.29	81.49	52.20	0.00	
2025000068	05141004	RE	2024	MCLAUGHLIN, SAMUEL BRYCE	8/1/2025	Value	5,800	10,490	4,690		PUV ROLLBACK
Public Notes:						Tax	37.13	67.16	30.03		
						LL	0.00	0.00	0.00		
						INT	0.00	2.18	2.18		
						Tax TTL	37.13	69.34	32.21	0.00	

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Date Posted between 8/1/2025 and 8/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000068	05141004	RE	2023	MCLAUGHLIN, SAMUEL BRYCE	8/1/2025	Value	5,800	10,490	4,690		PUV ROLLBACK
Public Notes:						Tax	36.54	66.08	29.54		
						LL	0.00	0.00	0.00		
						INT	0.00	4.80	4.80		
						Tax TTL	36.54	70.88	34.34	0.00	
2025000068	05141004	RE	2022	MCLAUGHLIN, SAMUEL BRYCE	8/1/2025	Value	5,800	10,490	4,690		PUV ROLLBACK
Public Notes:						Tax	36.54	66.08	29.54		
						LL	0.00	0.00	0.00		
						INT	0.00	7.46	7.46		
						Tax TTL	36.54	73.54	37.00	0.00	
2025000065	08135007A	RE	2025	GRIFFIN FARM & LANDFILL IN	8/1/2025	Value	804,700	1,291,800	487,100		PUV ROLLBACK
Public Notes:						Tax	4,089.49	6,564.93	2,475.44		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,089.49	6,564.93	2,475.44	0.00	
2025000065	08135007A	RE	2024	GRIFFIN FARM & LANDFILL IN	8/1/2025	Value	259,300	442,900	183,600		PUV ROLLBACK
Public Notes:						Tax	1,752.09	2,992.68	1,240.59		
						LL	0.00	0.00	0.00		
						INT	0.00	89.94	89.94		
						Tax TTL	1,752.09	3,082.62	1,330.53	0.00	
2025000065	08135007A	RE	2023	GRIFFIN FARM & LANDFILL IN	8/1/2025	Value	259,300	447,200	187,900		PUV ROLLBACK
Public Notes:						Tax	1,735.76	2,993.56	1,257.80		
						LL	0.00	0.00	0.00		
						INT	0.00	204.40	204.40		
						Tax TTL	1,735.76	3,197.96	1,462.20	0.00	
2025000065	08135007A	RE	2022	GRIFFIN FARM & LANDFILL IN	8/1/2025	Value	259,360	447,200	187,840		PUV ROLLBACK
Public Notes:						Tax	1,736.15	2,993.55	1,257.40		
						LL	0.00	0.00	0.00		
						INT	0.00	317.50	317.50		
						Tax TTL	1,736.15	3,311.05	1,574.90	0.00	

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Date Posted between 8/1/2025 and 8/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000125	08156015	RE	2025	CARNES, JACOB TYLER & HOLT, KAREN CARNES	8/13/2025	Value	471,500	501,960	30,460		PUV ROLLBACK
						Tax	2,396.16	2,550.96	154.80		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,396.16	2,550.96	154.80	0.00	
2025000125	08156015	RE	2024	CARNES, JACOB TYLER & HOLT, KAREN CARNES	8/13/2025	Value	337,200	354,660	17,460		PUV ROLLBACK
						Tax	2,278.46	2,396.44	117.98		
						LL	0.00	0.00	0.00		
						INT	0.00	8.55	8.55		
						Tax TTL	2,278.46	2,404.99	126.53	0.00	
2025000125	08156015	RE	2023	CARNES, JACOB TYLER & HOLT, KAREN CARNES	8/13/2025	Value	244,612	262,072	17,460		PUV ROLLBACK
						Tax	1,637.44	1,754.32	116.88		
						LL	0.00	0.00	0.00		
						INT	0.00	19.00	19.00		
						Tax TTL	1,637.44	1,773.32	135.88	0.00	
2025000125	08156015	RE	2022	CARNES, JACOB TYLER & HOLT, KAREN CARNES	8/13/2025	Value	244,612	262,072	17,460		PUV ROLLBACK
						Tax	1,637.44	1,754.32	116.88		
						LL	0.00	0.00	0.00		
						INT	0.00	29.51	29.51		
						Tax TTL	1,637.44	1,783.83	146.39	0.00	
2025000067	09075013	RE	2025	NEESE, JANE & NEESE, KENNETH E III	8/1/2025	Value	43,000	44,550	1,550		PUV ROLLBACK
						Tax	218.52	226.40	7.88		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	218.52	226.40	7.88	0.00	
2025000067	09075013	RE	2024	NEESE, JANE & NEESE, KENNETH E III	8/1/2025	Value	42,100	42,920	820		PUV ROLLBACK
						Tax	284.47	290.01	5.54		
						LL	0.00	0.00	0.00		
						INT	0.00	0.40	0.40		
						Tax TTL	284.47	290.41	5.94	0.00	

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Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000067	09075013	RE	2023	NEESE, JANE & NEESE, KENNETH E III	8/1/2025	Value	42,100	42,920	820		PUV ROLLBACK
						Tax	281.82	287.31	5.49		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.89	0.89		
						Tax TTL	281.82	288.20	6.38	0.00	
2025000067	09075013	RE	2022	NEESE, JANE & NEESE, KENNETH E III	8/1/2025	Value	42,100	42,920	820		PUV ROLLBACK
						Tax	281.82	287.31	5.49		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	1.39	1.39		
						Tax TTL	281.82	288.70	6.88	0.00	
2025000152	09411002	RE	2024	WINCHESTER, KIMALA H & WINCHESTER, GARY WAYNE	8/15/2025	Value	288,200	343,360	55,160		PUV ROLLBACK
						Tax	1,853.70	2,208.49	354.79		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	25.73	25.73		
						Tax TTL	1,853.70	2,234.22	380.52	0.00	
2025000152	09411002	RE	2023	WINCHESTER, KIMALA H & WINCHESTER, GARY WAYNE	8/15/2025	Value	288,200	343,360	55,160		PUV ROLLBACK
						Tax	1,828.34	2,178.28	349.94		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	56.87	56.87		
						Tax TTL	1,828.34	2,235.15	406.81	0.00	

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Date Posted between 8/1/2025 and 8/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000152	09411002	RE	2022	WINCHESTER, KIMALA H & WINCHESTER, GARY WAYNE	8/15/2025	Value	288,200	343,360	55,160		PUV ROLLBACK
						Tax	1,828.34	2,178.28	349.94		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	88.36	88.36		
						Tax TTL	1,828.34	2,266.64	438.30	0.00	
Totals for Type PUV Rollback :						Value	10,792,584	29,310,454	18,517,870		
						Tax	66,060.50	177,281.52	111,221.02		
						LL	0.00	0.00	0.00		
						INT	0.00	9,764.80	9,764.80		
						Tax TTL	66,060.50	187,046.32	120,985.82	0.00	

Correction Type : Tax Type Change - Non-Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000179	06138028	RE	2024	HELMS, JEFFREY & HELMS, ERICA	8/18/2025	Value	0	0	0		TAX CODE CHANGE
						Tax	0.00	0.00	0.00		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	
2025000179	06138028	RE	2023	HELMS, JEFFREY & HELMS, ERICA	8/18/2025	Value	0	0	0		TAX CODE CHANGE
						Tax	0.00	0.00	0.00		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	

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Correction Type : Tax Type Change - Non-Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000179	06138028	RE	2022	HELMS, JEFFREY & HELMS, ERICA	8/18/2025	Value	0	0	0		TAX CODE CHANGE
Public Notes:						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	
Totals for Type Tax Type Change - Non-Discovery :						Value	0	0	0		
						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000195	02301062A	RE	2025	CORTEZ, CHAYANNE TAPIA	8/19/2025	Value	41,700	300,000	258,300		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	404.99	2,913.60	2,508.61		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	404.99	2,913.60	2,508.61	0.00	
2025000175	03006007B	RE	2025	HOLBERT, WESLEY A & HOLBERT, LEAH M	8/18/2025	Value	95,400	209,100	113,700		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	475.86	1,042.99	567.13		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	475.86	1,042.99	567.13	0.00	

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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
2025000183	06138028	RE	2024	HELMS, JEFFREY & HELMS, ERICA	8/18/2025	Value	0	677,900	677,900		TAX CODE CHANGE
						Tax	0.00	6,950.51	6,950.51		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	6,950.51	6,950.51	0.00	
Public Notes:											
2025000183	06138028	RE	2023	HELMS, JEFFREY & HELMS, ERICA	8/18/2025	Value	0	612,200	612,200		TAX CODE CHANGE
						Tax	0.00	6,213.22	6,213.22		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	6,213.22	6,213.22	0.00	
Public Notes:											
2025000183	06138028	RE	2022	HELMS, JEFFREY & HELMS, ERICA	8/18/2025	Value	0	53,000	53,000		TAX CODE CHANGE
						Tax	0.00	537.90	537.90		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	537.90	537.90	0.00	
Public Notes:											
2025000216	08237009A	RE	2025	HILLCREST BAPTIST CHURCH R	8/21/2025	Value	0	1,118,400	1,118,400		EXEMPTION STATUS CHANGE
						Tax	0.00	5,683.71	5,683.71		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	5,683.71	5,683.71	0.00	
Public Notes:											
2025000196	09298368	RE	2025	THE PARK AT MONROE PROPERT	8/19/2025	Value	100	475,900	475,800		EXEMPTION STATUS CHANGE
						Tax	0.87	4,160.32	4,159.45		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.87	4,160.32	4,159.45	0.00	
Public Notes:											
2025000196	09298368	RE	2024	THE PARK AT MONROE PROPERT	8/19/2025	Value	0	403,700	403,700		EXEMPTION STATUS CHANGE
						Tax	0.00	4,402.35	4,402.35		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	4,402.35	4,402.35	0.00	
Public Notes:											

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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
2025000196	09298368	RE	2023	THE PARK AT MONROE PROPERT	8/19/2025	Value	0	403,700	403,700		EXEMPTION STATUS CHANGE
Public Notes:						Tax	0.00	4,402.35	4,402.35		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	4,402.35	4,402.35	0.00	
2025000196	09298368	RE	2022	THE PARK AT MONROE PROPERT	8/19/2025	Value	0	403,700	403,700		EXEMPTION STATUS CHANGE
Public Notes:						Tax	0.00	4,402.35	4,402.35		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	4,402.35	4,402.35	0.00	
2025000196	09298368	RE	2021	THE PARK AT MONROE PROPERT	8/19/2025	Value	0	403,700	403,700		EXEMPTION STATUS CHANGE
Public Notes:						Tax	0.00	4,402.35	4,402.35		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	4,402.35	4,402.35	0.00	
2025000157	2784511	PP	2025	CARPENTER, HOWARD MARK	8/15/2025	Value	4,425	6,601	2,176		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	21.56	32.17	10.61		
						LL	2.16	3.23	1.07		
						INT	0.00	0.00	0.00		
						Tax TTL	23.72	35.40	11.68	0.00	
2025000199	379415	PP	2025	REED, GARRY A	8/19/2025	Value	446	8,521	8,075		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	2.14	40.92	38.78		
						LL	0.21	4.09	3.88		
						INT	0.00	0.00	0.00		
						Tax TTL	2.35	45.01	42.66	0.00	
2025000074	386499	PP	2025	SHORT, ANTHONY D	8/6/2025	Value	7,149	34,028	26,879		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	34.84	165.82	130.98		
						LL	0.00	13.10	13.10		
						INT	0.00	0.00	0.00		
						Tax TTL	34.84	178.92	144.08	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000241	407414	PP	2025	B PHILEMON LLC	8/22/2025	Value	300,450	303,621	3,171		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,466.80	1,482.28	15.48		
						LL	0.00	1.55	1.55		
						INT	0.00	0.00	0.00		
						Tax TTL	1,466.80	1,483.83	17.03	0.00	
2025000171	407414	PP	2024	B PHILEMON LLC	8/18/2025	Value	227,872	229,628	1,756		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,494.16	1,505.67	11.51		
						LL	0.00	2.30	2.30		
						INT	0.00	0.00	0.00		
						Tax TTL	1,494.16	1,507.97	13.81	0.00	
2025000171	407414	PP	2023	B PHILEMON LLC	8/18/2025	Value	225,244	227,657	2,413		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,462.73	1,478.40	15.67		
						LL	0.00	4.70	4.70		
						INT	0.00	0.00	0.00		
						Tax TTL	1,462.73	1,483.10	20.37	0.00	
2025000171	407414	PP	2022	B PHILEMON LLC	8/18/2025	Value	156,088	159,058	2,970		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,013.64	1,032.92	19.28		
						LL	0.00	7.72	7.72		
						INT	0.00	0.00	0.00		
						Tax TTL	1,013.64	1,040.64	27.00	0.00	
2025000171	407414	PP	2021	B PHILEMON LLC	8/18/2025	Value	157,502	160,253	2,751		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,023.13	1,041.00	17.87		
						LL	0.00	8.94	8.94		
						INT	0.00	0.00	0.00		
						Tax TTL	1,023.13	1,049.94	26.81	0.00	
2025000171	407414	PP	2020	B PHILEMON LLC	8/18/2025	Value	173,053	176,424	3,371		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,342.89	1,369.05	26.16		
						LL	0.00	15.70	15.70		
						INT	0.00	0.00	0.00		
						Tax TTL	1,342.89	1,384.75	41.86	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000137	407816	PP	2025	BRANDON REEVES AUTO WORLD	8/13/2025	Value	45,472	57,936	12,464		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	397.52	506.48	108.96		
						LL	39.75	50.66	10.91		
						INT	0.00	0.00	0.00		
						Tax TTL	437.27	557.14	119.87	0.00	
2025000173	407964	PP	2023	C & C EDM INC	8/18/2025	Value	373,249	376,518	3,269		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,498.53	2,520.41	21.88		
						LL	0.00	6.56	6.56		
						INT	0.00	0.00	0.00		
						Tax TTL	2,498.53	2,526.97	28.44	0.00	
2025000212	407967	PP	2024	C & C METALS INC	8/20/2025	Value	624,518	682,671	58,153		TMA AUDIT DISCOVERY
Public Notes:						Tax	7,566.66	8,271.24	704.58		
						LL	0.00	140.92	140.92		
						INT	0.00	0.00	0.00		
						Tax TTL	7,566.66	8,412.16	845.50	0.00	
2025000212	407967	PP	2023	C & C METALS INC	8/20/2025	Value	673,154	737,420	64,266		TMA AUDIT DISCOVERY
Public Notes:						Tax	7,708.29	8,444.20	735.91		
						LL	0.00	220.77	220.77		
						INT	0.00	0.00	0.00		
						Tax TTL	7,708.29	8,664.97	956.68	0.00	
2025000212	407967	PP	2022	C & C METALS INC	8/20/2025	Value	576,378	628,934	52,556		TMA AUDIT DISCOVERY
Public Notes:						Tax	6,600.10	7,201.92	601.82		
						LL	0.00	305.28	305.28		
						INT	0.00	0.00	0.00		
						Tax TTL	6,600.10	7,507.20	907.10	0.00	
2025000212	407967	PP	2021	C & C METALS INC	8/20/2025	Value	624,984	680,428	55,444		TMA AUDIT DISCOVERY
Public Notes:						Tax	7,139.82	7,773.21	633.39		
						LL	0.00	316.70	316.70		
						INT	0.00	0.00	0.00		
						Tax TTL	7,139.82	8,089.91	950.09	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000212	407967	PP	2020	C & C METALS INC	8/20/2025	Value	641,881	689,910	48,029		TMA AUDIT DISCOVERY
Public Notes:						Tax	8,506.21	9,142.69	636.48		
						LL	0.00	381.89	381.89		
						INT	0.00	0.00	0.00		
						Tax TTL	8,506.21	9,524.58	1,018.37	0.00	
2025000142	408430	PP	2024	CHARLOTTE PIPE & FOUNDRY C	8/13/2025	Value	167,124,587	167,615,476	490,889		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,822,493.62	1,827,846.77	5,353.15		
						LL	0.00	1,070.63	1,070.63		
						INT	0.00	0.00	0.00		
						Tax TTL	1,822,493.62	1,828,917.40	6,423.78	0.00	
2025000142	408430	PP	2023	CHARLOTTE PIPE & FOUNDRY C	8/13/2025	Value	153,347,139	153,751,545	404,406		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,672,250.55	1,676,660.60	4,410.05		
						LL	0.00	1,323.02	1,323.02		
						INT	0.00	0.00	0.00		
						Tax TTL	1,672,250.55	1,677,983.62	5,733.07	0.00	
2025000142	408430	PP	2022	CHARLOTTE PIPE & FOUNDRY C	8/13/2025	Value	132,143,149	132,577,411	434,262		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,441,021.04	1,445,756.67	4,735.63		
						LL	0.00	1,894.25	1,894.25		
						INT	0.00	0.00	0.00		
						Tax TTL	1,441,021.04	1,447,650.92	6,629.88	0.00	
2025000142	408430	PP	2021	CHARLOTTE PIPE & FOUNDRY C	8/13/2025	Value	113,159,852	113,594,858	435,006		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,234,008.19	1,238,751.93	4,743.74		
						LL	0.00	2,371.87	2,371.87		
						INT	0.00	0.00	0.00		
						Tax TTL	1,234,008.19	1,241,123.80	7,115.61	0.00	
2025000142	408430	PP	2020	CHARLOTTE PIPE & FOUNDRY C	8/13/2025	Value	103,217,624	103,693,087	475,463		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,390,547.83	1,396,953.27	6,405.44		
						LL	0.00	3,843.26	3,843.26		
						INT	0.00	0.00	0.00		
						Tax TTL	1,390,547.83	1,400,796.53	10,248.70	0.00	

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2025000155	409652	PP	2025	EMV TOURS & LIMO LLC	8/15/2025	Value	21,853	199,153	177,300	UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	141.37	1,288.32	1,146.95	
						LL	14.14	128.84	114.70	
						INT	0.00	0.00	0.00	
						Tax TTL	155.51	1,417.16	1,261.65	
2025000136	410637	PP	2025	HEAVEN & EARTH LANDSCAPING	8/13/2025	Value	1,161,755	1,177,129	15,374	TMAUDIT DISCOVERY
Public Notes:						Tax	7,515.39	7,614.85	99.46	
						LL	751.54	761.48	9.94	
						INT	0.00	0.00	0.00	
						Tax TTL	8,266.93	8,376.33	109.40	
2025000076	410637	PP	2024	HEAVEN & EARTH LANDSCAPING	8/7/2025	Value	903,552	1,250,620	347,068	AUDIT
Public Notes:						Tax	7,447.08	10,307.61	2,860.53	
						LL	0.00	572.11	572.11	
						INT	0.00	0.00	0.00	
						Tax TTL	7,447.08	10,879.72	3,432.64	
2025000076	410637	PP	2023	HEAVEN & EARTH LANDSCAPING	8/7/2025	Value	808,039	1,024,073	216,034	AUDIT
Public Notes:						Tax	6,602.49	8,367.70	1,765.21	
						LL	0.00	529.56	529.56	
						INT	0.00	0.00	0.00	
						Tax TTL	6,602.49	8,897.26	2,294.77	
2025000076	410637	PP	2022	HEAVEN & EARTH LANDSCAPING	8/7/2025	Value	836,609	868,628	32,019	AUDIT
Public Notes:						Tax	6,835.93	7,097.56	261.63	
						LL	0.00	104.65	104.65	
						INT	0.00	0.00	0.00	
						Tax TTL	6,835.93	7,202.21	366.28	
2025000076	410637	PP	2021	HEAVEN & EARTH LANDSCAPING	8/7/2025	Value	648,002	679,267	31,265	AUDIT
Public Notes:						Tax	5,294.82	5,550.29	255.47	
						LL	0.00	127.74	127.74	
						INT	0.00	0.00	0.00	
						Tax TTL	5,294.82	5,678.03	383.21	

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2025000076	410637	PP	2020	HEAVEN & EARTH LANDSCAPING	8/7/2025	Value	495,042	526,307	31,265		AUDIT
Public Notes:						Tax	4,775.18	5,076.76	301.58		
						LL	0.00	180.95	180.95		
						INT	0.00	0.00	0.00		
						Tax TTL	4,775.18	5,257.71	482.53	0.00	
2025000115	412886	PP	2025	NORTH CAROLINA FARMS INC	8/12/2025	Value	697,325	810,640	113,315		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	3,373.66	3,921.88	548.22		
						LL	337.37	392.19	54.82		
						INT	0.00	0.00	0.00		
						Tax TTL	3,711.03	4,314.07	603.04	0.00	
2025000346	414903	PP	2023	TRUIST BANK	8/29/2025	Value	410,968	412,796	1,828		TMA AUDIT DISCOVERY
Public Notes:						Tax	4,170.91	4,189.47	18.56		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,170.91	4,189.47	18.56	0.00	
2025000346	414903	PP	2022	TRUIST BANK	8/29/2025	Value	283,000	311,175	28,175		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,872.17	3,158.12	285.95		
						LL	0.00	114.38	114.38		
						INT	0.00	0.00	0.00		
						Tax TTL	2,872.17	3,272.50	400.33	0.00	
2025000346	414903	PP	2021	TRUIST BANK	8/29/2025	Value	300,141	317,616	17,475		TMA AUDIT DISCOVERY
Public Notes:						Tax	3,041.33	3,218.40	177.07		
						LL	0.00	88.54	88.54		
						INT	0.00	0.00	0.00		
						Tax TTL	3,041.33	3,306.94	265.61	0.00	
2025000346	414903	PP	2020	TRUIST BANK	8/29/2025	Value	270,030	305,454	35,424		TMA AUDIT DISCOVERY
Public Notes:						Tax	3,155.30	3,569.23	413.93		
						LL	0.00	248.36	248.36		
						INT	0.00	0.00	0.00		
						Tax TTL	3,155.30	3,817.59	662.29	0.00	

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2025000091	578516	PP	2025	BIRCHFIELD, STEVEN CRAIG	8/9/2025	Value	8,006	101,240	93,234		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	40.00	505.80	465.80		
						LL	4.00	50.58	46.58		
						INT	0.00	0.00	0.00		
						Tax TTL	44.00	556.38	512.38	0.00	
2025000174	600399	PP	2025	R&R FLEET LLC	8/18/2025	Value	2,733,656	2,923,126	189,470		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	17,872.64	19,111.40	1,238.76		
						LL	1,787.26	1,911.19	123.93		
						INT	0.00	0.00	0.00		
						Tax TTL	19,659.90	21,022.59	1,362.69	0.00	
2025000087	612373	PP	2025	MCPAHAN, TANNER CHASE	8/9/2025	Value	2,263	8,066	5,803		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	19.78	70.51	50.73		
						LL	1.98	7.05	5.07		
						INT	0.00	0.00	0.00		
						Tax TTL	21.76	77.56	55.80	0.00	
2025000087	612373	PP	2024	MCPAHAN, TANNER CHASE	8/9/2025	Value	2,382	8,491	6,109		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	25.98	92.59	66.61		
						LL	2.60	15.92	13.32		
						INT	0.00	0.00	0.00		
						Tax TTL	28.58	108.51	79.93	0.00	
2025000087	612373	PP	2023	MCPAHAN, TANNER CHASE	8/9/2025	Value	2,508	8,938	6,430		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	27.35	97.47	70.12		
						LL	2.74	23.78	21.04		
						INT	0.00	0.00	0.00		
						Tax TTL	30.09	121.25	91.16	0.00	
2025000087	612373	PP	2022	MCPAHAN, TANNER CHASE	8/9/2025	Value	2,779	9,548	6,769		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	30.30	104.12	73.82		
						LL	3.03	32.56	29.53		
						INT	0.00	0.00	0.00		
						Tax TTL	33.33	136.68	103.35	0.00	

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2025000087	612373	PP	2021	MCPAHAN, TANNER CHASE	8/9/2025	Value	11,281	18,406	7,125		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	123.02	200.72	77.70		
						LL	12.30	51.15	38.85		
						INT	0.00	0.00	0.00		
						Tax TTL	135.32	251.87	116.55	0.00	
2025000156	620672	PP	2025	EL GRACE TRANSPORT LLC	8/15/2025	Value	74,083	143,320	69,237		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	647.63	1,252.90	605.27		
						LL	64.76	125.30	60.54		
						INT	0.00	0.00	0.00		
						Tax TTL	712.39	1,378.20	665.81	0.00	
2025000072	621200	PP	2025	CARPENTER, HAILEY MARIE	8/5/2025	Value	857	2,649	1,792		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	4.18	12.91	8.73		
						LL	0.42	1.29	0.87		
						INT	0.00	0.00	0.00		
						Tax TTL	4.60	14.20	9.60	0.00	
2025000336	625586	PP	2025	RODRIGUEZ, MARIELA	8/29/2025	Value	4,287	8,574	4,287		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	28.03	56.06	28.03		
						LL	2.80	5.60	2.80		
						INT	0.00	0.00	0.00		
						Tax TTL	30.83	61.66	30.83	0.00	
2025000336	625586	PP	2024	RODRIGUEZ, MARIELA	8/29/2025	Value	4,513	9,026	4,513		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	37.76	75.53	37.77		
						LL	3.78	11.33	7.55		
						INT	0.00	0.00	0.00		
						Tax TTL	41.54	86.86	45.32	0.00	
2025000167	640624	PP	2025	HARTSVILLE AMUSMENT CO INC	8/15/2025	Value	713	1,650	937		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	3.43	7.95	4.52		
						LL	0.34	0.80	0.46		
						INT	0.00	0.00	0.00		
						Tax TTL	3.77	8.75	4.98	0.00	

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2025000158	640988	PP	2025	CARTELLI, BRIAN ARDELL	8/15/2025	Value	27,964	29,467	1,503		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	141.36	148.96	7.60		
						LL	0.00	0.76	0.76		
						INT	0.00	0.00	0.00		
						Tax TTL	141.36	149.72	8.36	0.00	
2025000162	646198	PP	2025	CAO, THEP BA	8/15/2025	Value	300	7,189	6,889		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	2.62	62.85	60.23		
						LL	0.26	6.28	6.02		
						INT	0.00	0.00	0.00		
						Tax TTL	2.88	69.13	66.25	0.00	
2025000162	646198	PP	2024	CAO, THEP BA	8/15/2025	Value	300	300	0		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	3.27	3.27	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3.27	3.27	0.00	0.00	
2025000201	646243	PP	2025	MANUS, COREY PATRICK	8/19/2025	Value	23,271	138,393	115,122		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	113.61	675.63	562.02		
						LL	11.36	67.56	56.20		
						INT	0.00	0.00	0.00		
						Tax TTL	124.97	743.19	618.22	0.00	
2025000116	657877	PP	2024	INNOVATIVE SOURCING SOLUTI	8/12/2025	Value	0	1,111	1,111		BUSINESS CANVASSING DISCOVERY
Public Notes:						Tax	0.00	11.39	11.39		
						LL	0.00	2.28	2.28		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	13.67	13.67	0.00	
2025000116	657877	PP	2023	INNOVATIVE SOURCING SOLUTI	8/12/2025	Value	0	1,497	1,497		BUSINESS CANVASSING DISCOVERY
Public Notes:						Tax	0.00	15.19	15.19		
						LL	0.00	4.56	4.56		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	19.75	19.75	0.00	

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2025000116	657877	PP	2022	INNOVATIVE SOURCING SOLUTI	8/12/2025	Value	0	1,815	1,815		BUSINESS CANVASSING DISCOVERY
Public Notes:						Tax	0.00	18.42	18.42		
						LL	0.00	7.37	7.37		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	25.79	25.79	0.00	
2025000116	657877	PP	2021	INNOVATIVE SOURCING SOLUTI	8/12/2025	Value	0	844	844		BUSINESS CANVASSING DISCOVERY
Public Notes:						Tax	0.00	8.55	8.55		
						LL	0.00	4.28	4.28		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	12.83	12.83	0.00	
2025000116	657877	PP	2020	INNOVATIVE SOURCING SOLUTI	8/12/2025	Value	0	935	935		BUSINESS CANVASSING DISCOVERY
Public Notes:						Tax	0.00	10.93	10.93		
						LL	0.00	6.56	6.56		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	17.49	17.49	0.00	
2025000345	658546	PP	2024	ELITE INFRASTRUCTURE GROUP	8/29/2025	Value	0	604,637	604,637		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	6,593.57	6,593.57		
						LL	0.00	1,318.71	1,318.71		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	7,912.28	7,912.28	0.00	
2025000123	661855	PP	2025	GHOST RIDER TRUCKING LLC	8/13/2025	Value	0	41,308	41,308		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	262.14	262.14		
						LL	0.00	26.21	26.21		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	288.35	288.35	0.00	
2025000340	661858	PP	2025	SLINGSHOT TRUCKING LLC	8/29/2025	Value	0	11,040	11,040		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	96.51	96.51		
						LL	0.00	9.65	9.65		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	106.16	106.16	0.00	

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2025000242 Public Notes:	661860	PP	2025	GRAHAM, MARCUS JEROME	8/22/2025	Value	0	19,200	19,200		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	167.85	167.85		
						LL	0.00	16.79	16.79		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	184.64	184.64	0.00	
2025000242 Public Notes:	661860	PP	2024	GRAHAM, MARCUS JEROME	8/22/2025	Value	0	21,300	21,300		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	232.28	232.28		
						LL	0.00	46.46	46.46		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	278.74	278.74	0.00	
2025000242 Public Notes:	661860	PP	2023	GRAHAM, MARCUS JEROME	8/22/2025	Value	0	23,400	23,400		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	255.18	255.18		
						LL	0.00	76.55	76.55		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	331.73	331.73	0.00	
2025000242 Public Notes:	661860	PP	2022	GRAHAM, MARCUS JEROME	8/22/2025	Value	0	23,700	23,700		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	258.45	258.45		
						LL	0.00	103.38	103.38		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	361.83	361.83	0.00	
2025000242 Public Notes:	661860	PP	2021	GRAHAM, MARCUS JEROME	8/22/2025	Value	0	25,500	25,500		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	278.08	278.08		
						LL	0.00	139.04	139.04		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	417.12	417.12	0.00	
2025000242 Public Notes:	661860	PP	2020	GRAHAM, MARCUS JEROME	8/22/2025	Value	0	27,600	27,600		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	371.83	371.83		
						LL	0.00	223.10	223.10		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	594.93	594.93	0.00	

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2025000338	661861	PP	2025	GEBREYOWHANES, ZENAWI	8/29/2025	Value	0	17,395	17,395		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	112.53	112.53		
						LL	0.00	11.25	11.25		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	123.78	123.78	0.00	
2025000338	661861	PP	2024	GEBREYOWHANES, ZENAWI	8/29/2025	Value	0	19,100	19,100		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	157.42	157.42		
						LL	0.00	31.48	31.48		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	188.90	188.90	0.00	
2025000338	661861	PP	2023	GEBREYOWHANES, ZENAWI	8/29/2025	Value	0	19,355	19,355		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	158.15	158.15		
						LL	0.00	47.45	47.45		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	205.60	205.60	0.00	
2025000338	661861	PP	2022	GEBREYOWHANES, ZENAWI	8/29/2025	Value	0	20,825	20,825		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	170.16	170.16		
						LL	0.00	68.06	68.06		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	238.22	238.22	0.00	
2025000338	661861	PP	2021	GEBREYOWHANES, ZENAWI	8/29/2025	Value	0	22,540	22,540		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	184.17	184.17		
						LL	0.00	92.09	92.09		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	276.26	276.26	0.00	
2025000339	661864	PP	2025	HAMPTON, TRACEY BERNARD JR	8/29/2025	Value	0	12,780	12,780		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	111.72	111.72		
						LL	0.00	11.17	11.17		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	122.89	122.89	0.00	

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2025000339	661864	PP	2024	HAMPTON, TRACEY BERNARD JR	8/29/2025	Value	0	14,040	14,040		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	153.11	153.11		
						LL	0.00	30.62	30.62		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	183.73	183.73	0.00	
Public Notes:											
2025000337	661871	PP	2025	JELAB LOGISTICS LLC	8/29/2025	Value	0	57,417	57,417		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	373.44	373.44		
						LL	0.00	37.34	37.34		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	410.78	410.78	0.00	
Public Notes:											
2025000095	661872	PP	2024	BRODSKY, STEVE	8/11/2025	Value	0	24,714	24,714		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	269.51	269.51		
						LL	0.00	53.90	53.90		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	323.41	323.41	0.00	
Public Notes:											
2025000166	661891	PP	2024	CAUTHEN, TIMOTHY JAMES	8/15/2025	Value	0	857	857		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	5.54	5.54		
						LL	0.00	1.11	1.11		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	6.65	6.65	0.00	
Public Notes:											
2025000166	661891	PP	2023	CAUTHEN, TIMOTHY JAMES	8/15/2025	Value	0	903	903		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	5.66	5.66		
						LL	0.00	1.70	1.70		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	7.36	7.36	0.00	
Public Notes:											
2025000124	661926	PP	2024	LLTTOFAUS INC	8/13/2025	Value	0	9,000	9,000		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	74.18	74.18		
						LL	0.00	14.84	14.84		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	89.02	89.02	0.00	
Public Notes:											

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2025000197	662749	PP	2024	LAGUNA, MARTINA	8/19/2025	Value	0	4,750	4,750		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	40.46	40.46		
						LL	0.00	8.09	8.09		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	48.55	48.55	0.00	
2025000194	662751	PP	2024	HOGBERG, COREY DANIEL	8/19/2025	Value	0	1,710	1,710		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	11.00	11.00		
						LL	0.00	2.20	2.20		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	13.20	13.20	0.00	
2025000239	662768	PP	2025	BENENHALEY, ROBIN GRIFFIN	8/22/2025	Value	0	9,827	9,827		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	50.19	50.19		
						LL	0.00	5.02	5.02		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	55.21	55.21	0.00	
2025000239	662768	PP	2024	BENENHALEY, ROBIN GRIFFIN	8/22/2025	Value	0	10,344	10,344		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	69.15	69.15		
						LL	0.00	13.83	13.83		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	82.98	82.98	0.00	
2025000239	662768	PP	2023	BENENHALEY, ROBIN GRIFFIN	8/22/2025	Value	0	10,889	10,889		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	71.68	71.68		
						LL	0.00	21.50	21.50		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	93.18	93.18	0.00	
2025000239	662768	PP	2022	BENENHALEY, ROBIN GRIFFIN	8/22/2025	Value	0	11,462	11,462		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	74.74	74.74		
						LL	0.00	29.90	29.90		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	104.64	104.64	0.00	

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2025000239	662768	PP	2021	BENENHALEY, ROBIN GRIFFIN	8/22/2025	Value	0	12,065	12,065		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	78.68	78.68		
						LL	0.00	39.34	39.34		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	118.02	118.02	0.00	
2025000204	663488	PP	2025	2ND MILE RIDERS CMA CHAPTE	8/19/2025	Value	0	2,050	2,050		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	9.82	9.82		
						LL	0.00	0.98	0.98		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	10.80	10.80	0.00	
2025000208	663492	PP	2025	MCFADDEN, DEAN CLARK	8/20/2025	Value	0	14,250	14,250		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	71.12	71.12		
						LL	0.00	7.12	7.12		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	78.24	78.24	0.00	
2025000098	664222	PP	2025	BAILEY, HAZEL	8/11/2025	Value	0	8,433	8,433		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	42.13	42.13		
						LL	0.00	4.21	4.21		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	46.34	46.34	0.00	
2025000098	664222	PP	2024	BAILEY, HAZEL	8/11/2025	Value	0	8,878	8,878		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	57.96	57.96		
						LL	0.00	11.59	11.59		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	69.55	69.55	0.00	
2025000098	664222	PP	2023	BAILEY, HAZEL	8/11/2025	Value	0	9,345	9,345		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	59.15	59.15		
						LL	0.00	17.75	17.75		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	76.90	76.90	0.00	

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2025000098	664222	PP	2022	BAILEY, HAZEL	8/11/2025	Value	0	9,837	9,837		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	62.56	62.56		
						LL	0.00	25.02	25.02		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	87.58	87.58	0.00	
2025000098	664222	PP	2021	BAILEY, HAZEL	8/11/2025	Value	0	10,355	10,355		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	65.86	65.86		
						LL	0.00	32.93	32.93		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	98.79	98.79	0.00	
2025000092	664937	PP	2025	BENTON, DAVID RANDALL & BENTON, PENNY	8/9/2025	Value	0	110,385	110,385		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	964.99	964.99		
						LL	0.00	96.50	96.50		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,061.49	1,061.49	0.00	
2025000092	664937	PP	2024	BENTON, DAVID RANDALL & BENTON, PENNY	8/9/2025	Value	0	116,195	116,195		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	1,267.11	1,267.11		
						LL	0.00	253.42	253.42		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,520.53	1,520.53	0.00	
2025000088	664958	PP	2025	BURRIS, FRANCIS NELSON	8/9/2025	Value	0	880	880		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	4.23	4.23		
						LL	0.00	0.42	0.42		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	4.65	4.65	0.00	
2025000088	664958	PP	2024	BURRIS, FRANCIS NELSON	8/9/2025	Value	0	891	891		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	5.71	5.71		
						LL	0.00	1.14	1.14		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	6.85	6.85	0.00	

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Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000088	664958	PP	2023	BURRIS, FRANCIS NELSON	8/9/2025	Value	0	934	934		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	5.88	5.88		
						LL	0.00	1.76	1.76		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	7.64	7.64	0.00	
2025000088	664958	PP	2022	BURRIS, FRANCIS NELSON	8/9/2025	Value	0	491	491		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	3.09	3.09		
						LL	0.00	1.24	1.24		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	4.33	4.33	0.00	
2025000088	664958	PP	2021	BURRIS, FRANCIS NELSON	8/9/2025	Value	0	484	484		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	3.04	3.04		
						LL	0.00	1.52	1.52		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	4.56	4.56	0.00	
2025000341	664963	PP	2024		8/29/2025	Value	0	7,905	7,905		GAP BILL
Public Notes:						Tax	0.00	64.25	64.25		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	64.25	64.25	0.00	
2025000086	664965	PP	2025	LOVETTE, GREGORY SHAWN & LOVETTE, CHRISTY	8/9/2025	Value	0	61,823	61,823		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	322.04	322.04		
						LL	0.00	32.20	32.20		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	354.24	354.24	0.00	
2025000102	664966	PP	2024		8/12/2025	Value	0	12,248	12,248		GAP BILL
Public Notes:						Tax	0.00	79.95	79.95		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	79.95	79.95	0.00	

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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
2025000099	664968	PP	2024		8/11/2025	Value	0	4,220	4,220	GAP BILL
Public Notes:						Tax	0.00	27.55	27.55	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	0.00	27.55	27.55	0.00
2025000090	664969	PP	2025	MACOMBER, CLIFTON EVANS	8/9/2025	Value	0	616	616	UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	3.13	3.13	
						LL	0.00	0.31	0.31	
						INT	0.00	0.00	0.00	
						Tax TTL	0.00	3.44	3.44	0.00
2025000090	664969	PP	2024	MACOMBER, CLIFTON EVANS	8/9/2025	Value	0	648	648	UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	4.38	4.38	
						LL	0.00	0.88	0.88	
						INT	0.00	0.00	0.00	
						Tax TTL	0.00	5.26	5.26	0.00
2025000090	664969	PP	2023	MACOMBER, CLIFTON EVANS	8/9/2025	Value	0	682	682	UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	4.57	4.57	
						LL	0.00	1.37	1.37	
						INT	0.00	0.00	0.00	
						Tax TTL	0.00	5.94	5.94	0.00
2025000090	664969	PP	2022	MACOMBER, CLIFTON EVANS	8/9/2025	Value	0	718	718	UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	4.81	4.81	
						LL	0.00	1.92	1.92	
						INT	0.00	0.00	0.00	
						Tax TTL	0.00	6.73	6.73	0.00
2025000090	664969	PP	2021	MACOMBER, CLIFTON EVANS	8/9/2025	Value	0	756	756	UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	5.06	5.06	
						LL	0.00	2.53	2.53	
						INT	0.00	0.00	0.00	
						Tax TTL	0.00	7.59	7.59	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
2025000090	664969	PP	2020	MACOMBER, CLIFTON EVANS	8/9/2025	Value	0	796	796		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	6.34	6.34		
						LL	0.00	3.80	3.80		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	10.14	10.14	0.00	
2025000085	664974	PP	2025	MENDEZ, DUNIESKY	8/9/2025	Value	0	774	774		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	3.72	3.72		
						LL	0.00	0.37	0.37		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	4.09	4.09	0.00	
2025000085	664974	PP	2024	MENDEZ, DUNIESKY	8/9/2025	Value	0	815	815		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	5.23	5.23		
						LL	0.00	1.05	1.05		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	6.28	6.28	0.00	
2025000085	664974	PP	2023	MENDEZ, DUNIESKY	8/9/2025	Value	0	857	857		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	5.45	5.45		
						LL	0.00	1.64	1.64		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	7.09	7.09	0.00	
2025000085	664974	PP	2022	MENDEZ, DUNIESKY	8/9/2025	Value	0	903	903		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	5.74	5.74		
						LL	0.00	2.30	2.30		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	8.04	8.04	0.00	
2025000085	664974	PP	2021	MENDEZ, DUNIESKY	8/9/2025	Value	0	950	950		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	6.03	6.03		
						LL	0.00	3.02	3.02		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	9.05	9.05	0.00	

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Date Posted between 8/1/2025 and 8/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000096 Public Notes:	664985	PP	2025	BLACK, BOBBY RAY JR	8/11/2025	Value	0	3,665	3,665		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	32.04	32.04		
						LL	0.00	3.20	3.20		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	35.24	35.24	0.00	
2025000096 Public Notes:	664985	PP	2024	BLACK, BOBBY RAY JR	8/11/2025	Value	0	3,858	3,858		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	42.07	42.07		
						LL	0.00	8.41	8.41		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	50.48	50.48	0.00	
2025000096 Public Notes:	664985	PP	2023	BLACK, BOBBY RAY JR	8/11/2025	Value	0	4,061	4,061		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	44.29	44.29		
						LL	0.00	13.29	13.29		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	57.58	57.58	0.00	
2025000096 Public Notes:	664985	PP	2022	BLACK, BOBBY RAY JR	8/11/2025	Value	0	4,275	4,275		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	46.62	46.62		
						LL	0.00	18.65	18.65		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	65.27	65.27	0.00	
2025000097 Public Notes:	664992	PP	2025	BOWLES, DAVID ALEXANDER	8/11/2025	Value	0	1,230	1,230		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	7.81	7.81		
						LL	0.00	0.78	0.78		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	8.59	8.59	0.00	
2025000097 Public Notes:	664992	PP	2024	BOWLES, DAVID ALEXANDER	8/11/2025	Value	0	1,295	1,295		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	10.53	10.53		
						LL	0.00	2.11	2.11		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	12.64	12.64	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000097	664992	PP	2023	BOWLES, DAVID ALEXANDER	8/11/2025	Value	0	1,363	1,363		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	11.05	11.05		
						LL	0.00	3.32	3.32		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	14.37	14.37	0.00	
2025000161	665002	PP	2025	CARROLL, NOAH DANIEL	8/15/2025	Value	0	4,750	4,750		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	22.07	22.07		
						LL	0.00	2.21	2.21		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	24.28	24.28	0.00	
2025000160	665004	PP	2025	CARO, SERGIO MICHAEL	8/15/2025	Value	0	4,649	4,649		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	24.22	24.22		
						LL	0.00	2.42	2.42		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	26.64	26.64	0.00	
2025000094	665005	PP	2025	BUHL, DILLON PATRICK	8/11/2025	Value	0	34,295	34,295		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	299.81	299.81		
						LL	0.00	29.98	29.98		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	329.79	329.79	0.00	
2025000094	665005	PP	2024	BUHL, DILLON PATRICK	8/11/2025	Value	0	36,100	36,100		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	393.67	393.67		
						LL	0.00	78.73	78.73		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	472.40	472.40	0.00	
2025000093	665007	PP	2025	BURKE, GRAHAM DANIEL & BURKE, MONICA	8/9/2025	Value	0	32,490	32,490		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	156.02	156.02		
						LL	0.00	15.60	15.60		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	171.62	171.62	0.00	

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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
2025000093	665007	PP	2024	BURKE, GRAHAM DANIEL & BURKE, MONICA	8/9/2025	Value	0	34,200	34,200		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	218.98	218.98		
						LL	0.00	43.80	43.80		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	262.78	262.78	0.00	
Public Notes:											
2025000140	665032	PP	2025	AGUILAR CASTRO, JONATHAN	8/13/2025	Value	0	2,573	2,573		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	22.49	22.49		
						LL	0.00	2.25	2.25		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	24.74	24.74	0.00	
Public Notes:											
2025000140	665032	PP	2024	AGUILAR CASTRO, JONATHAN	8/13/2025	Value	0	2,708	2,708		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	29.53	29.53		
						LL	0.00	5.91	5.91		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	35.44	35.44	0.00	
Public Notes:											
2025000140	665032	PP	2023	AGUILAR CASTRO, JONATHAN	8/13/2025	Value	0	2,851	2,851		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	31.09	31.09		
						LL	0.00	9.33	9.33		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	40.42	40.42	0.00	
Public Notes:											
2025000140	665032	PP	2022	AGUILAR CASTRO, JONATHAN	8/13/2025	Value	0	3,001	3,001		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	32.73	32.73		
						LL	0.00	13.09	13.09		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	45.82	45.82	0.00	
Public Notes:											
2025000140	665032	PP	2021	AGUILAR CASTRO, JONATHAN	8/13/2025	Value	0	3,159	3,159		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	34.45	34.45		
						LL	0.00	17.23	17.23		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	51.68	51.68	0.00	
Public Notes:											

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Union County

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000112	666173	PP	2024		8/12/2025	Value	0	11,072	11,072		GAP BILL
Public Notes:						Tax	0.00	92.65	92.65		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	92.65	92.65	0.00	
2025000344	666177	PP	2025		8/29/2025	Value	0	1,354	1,354		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	8.81	8.81		
						LL	0.00	0.88	0.88		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	9.69	9.69	0.00	
2025000334	666183	PP	2025	GLASS, JASON LEE	8/29/2025	Value	0	12,460	12,460		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	57.89	57.89		
						LL	0.00	5.79	5.79		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	63.68	63.68	0.00	
2025000111	666184	PP	2024		8/12/2025	Value	0	1,038	1,038		GAP BILL
Public Notes:						Tax	0.00	6.87	6.87		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	6.87	6.87	0.00	
2025000109	666861	PP	2024		8/12/2025	Value	0	6,750	6,750		GAP BILL
Public Notes:						Tax	0.00	55.63	55.63		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	55.63	55.63	0.00	
2025000335	666862	PP	2025	KEZIAH, CASEY DAN	8/29/2025	Value	0	5,790	5,790		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	29.42	29.42		
						LL	0.00	2.94	2.94		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	32.36	32.36	0.00	

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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
2025000335	666862	PP	2024	KEZIAH, CASEY DAN	8/29/2025	Value	0	6,430	6,430		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	43.45	43.45		
						LL	0.00	8.69	8.69		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	52.14	52.14	0.00	
2025000108	667938	PP	2024		8/12/2025	Value	0	8,642	8,642		GAP BILL
Public Notes:						Tax	0.00	56.41	56.41		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	56.41	56.41	0.00	
2025000107	667939	PP	2024		8/12/2025	Value	0	1,515	1,515		GAP BILL
Public Notes:						Tax	0.00	9.89	9.89		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	9.89	9.89	0.00	
2025000106	667942	PP	2024		8/12/2025	Value	0	55,733	55,733		GAP BILL
Public Notes:						Tax	0.00	372.30	372.30		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	372.30	372.30	0.00	
2025000105	668533	PP	2024		8/12/2025	Value	0	2,853	2,853		GAP BILL
Public Notes:						Tax	0.00	28.92	28.92		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	28.92	28.92	0.00	
2025000104	668534	PP	2024		8/12/2025	Value	0	48,000	48,000		GAP BILL
Public Notes:						Tax	0.00	313.34	313.34		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	313.34	313.34	0.00	

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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
2025000209	669079	PP	2025	CIELOS CAPITAL LLC & CHARLOTTE ZOOKEEPER LLC	8/20/2025	Value	0	1,200,000	1,200,000		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	10,490.40	10,490.40		
						LL	0.00	1,049.04	1,049.04		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	11,539.44	11,539.44	0.00	
Totals for Type Value Change - Discovery :						Value	683,676,895	695,768,665	12,091,770		
						Tax	7,683,828.56	7,795,876.34	112,047.78		
						LL	3,042.80	21,897.56	18,854.76		
						INT	0.00	0.00	0.00		
						Tax TTL	7,686,871.36	7,817,773.90	130,902.54	0.00	

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000118	01060013A	RE	2025	SIMPSON, SHAWN CANNON & SIMPSON, RODNEY G	8/12/2025	Value	16,000	16,000	0		CHANGE VALUE PER BER
						Tax	80.88	80.88	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	80.88	80.88	0.00	0.00	
2025000282	01234028D	RE	2025	TYSON, HANNAH C & TYSON, KELLY	8/26/2025	Value	13,800	0	(13,800)		ACREAGE CHANGE
						Tax	69.76	0.00	(69.76)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	69.76	0.00	(69.76)	0.00	

Correction Listing Report

Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000314	02114110	RE	2025	MCCRACKEN, WARREN	8/27/2025	Value	116,800	61,900	(54,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	585.40	310.24	(275.16)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	585.40	310.24	(275.16)	0.00	
2025000313	02230064	RE	2025	OXENDINE, BILLY KEITH	8/27/2025	Value	601,000	528,300	(72,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,041.66	2,673.73	(367.93)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,041.66	2,673.73	(367.93)	0.00	
2025000219	02242028D	RE	2025	EDWARDS, PENNY GREENE & EDWARDS, ALLEN SCOTT	8/21/2025	Value	345,900	283,400	(62,500)		CLERICAL ERROR
Public Notes:						Tax	1,750.60	1,434.29	(316.31)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,750.60	1,434.29	(316.31)	0.00	
2025000312	02303029	RE	2025	AMUNDSEN, DAVID M & AMUNDSEN, DIANE F	8/27/2025	Value	503,900	444,400	(59,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,525.55	2,227.33	(298.22)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,525.55	2,227.33	(298.22)	0.00	
2025000220	02310040	RE	2025	ELKIN, JANE MCBRYDE	8/21/2025	Value	499,400	262,600	(236,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,850.17	2,550.37	(2,299.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,850.17	2,550.37	(2,299.80)	0.00	
2025000311	02311028	RE	2025	LITTLE, ELLEN JOY	8/27/2025	Value	561,700	521,000	(40,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,455.23	5,059.95	(395.28)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,455.23	5,059.95	(395.28)	0.00	

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2025000310	02315009	RE	2025	CHAMBERS, MAGALENE & CHAMBERS, MICHAEL	8/27/2025	Value	120,100	97,700	(22,400)	CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,166.41	948.86	(217.55)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	1,166.41	948.86	(217.55)	
2025000236	02316016	RE	2025	NEW MILL TREE APARTMENTS L	8/22/2025	Value	2,193,800	1,500,800	(693,000)	CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	21,306.19	14,575.77	(6,730.42)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	21,306.19	14,575.77	(6,730.42)	
2025000309	02321032	RE	2025	GRACE, ROSA H	8/27/2025	Value	239,700	226,100	(13,600)	CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,327.97	2,195.88	(132.09)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	2,327.97	2,195.88	(132.09)	
2025000307	04087014D	RE	2025	MANGUM, GERALD W	8/27/2025	Value	718,900	629,900	(89,000)	CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,437.78	3,012.18	(425.60)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	3,437.78	3,012.18	(425.60)	
2025000120	04117029	RE	2025	HELMS, RHONDA MARIE	8/12/2025	Value	1,027,600	942,900	(84,700)	CHANGE VALUE PER BER
Public Notes:						Tax	4,913.98	4,508.95	(405.03)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	4,913.98	4,508.95	(405.03)	
2025000222	04237027	RE	2025	FAASSEN, JON	8/21/2025	Value	931,000	875,000	(56,000)	CHANGE VALUE PER BER
Public Notes:						Tax	4,290.98	4,032.88	(258.10)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	4,290.98	4,032.88	(258.10)	

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2025000224	04347021	RE	2025	SATURLEY, JOSEPH H & SATURLEY, MARGARET H	8/21/2025	Value	442,800	371,800	(71,000)		CHANGE VALUE PER BER
Public Notes:						Tax	2,120.13	1,780.18	(339.95)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,120.13	1,780.18	(339.95)	0.00	
2025000223	05063105	RE	2025	BLACK, DAVID P & BLACK, SHONNA L	8/21/2025	Value	1,442,600	1,299,400	(143,200)		CHANGE VALUE PER BER
Public Notes:						Tax	6,927.37	6,239.72	(687.65)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,927.37	6,239.72	(687.65)	0.00	
2025000119	05090007H	RE	2025	ADLER TRUST	8/12/2025	Value	1,839,800	1,661,400	(178,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,834.72	7,978.04	(856.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,834.72	7,978.04	(856.68)	0.00	
2025000270	06003054	RE	2025	ETHERIDGE, TERRY L TRUSTEE	8/26/2025	Value	411,900	396,300	(15,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,006.36	1,930.38	(75.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,006.36	1,930.38	(75.98)	0.00	
2025000269	06027189	RE	2025	RUSSELL, SHELIA & RUSSELL, THOMAS JERRY	8/26/2025	Value	790,300	750,800	(39,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,671.73	3,488.22	(183.51)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,671.73	3,488.22	(183.51)	0.00	
2025000117	06033302	RE	2025	MUHLITNER, NANCY & MUHLITNER, ERIC	8/12/2025	Value	605,000	552,200	(52,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,913.68	2,659.40	(254.28)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,913.68	2,659.40	(254.28)	0.00	

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2025000128	06045067	RE	2025	VICKERS, JULIE A TRUSTEE & VICKERS JULIE REVOCABLE	8/13/2025	Value	928,400	832,100	(96,300)		CHANGE VALUE DUE TO AN APPEAL
						Tax	4,522.24	4,053.16	(469.08)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,522.24	4,053.16	(469.08)	0.00	
Public Notes:											
2025000268	06048490	RE	2025	BENNETT, HAROLD & BENNETT, BERDINA A	8/25/2025	Value	711,000	690,100	(20,900)		CHANGE VALUE DUE TO AN APPEAL
						Tax	3,463.28	3,361.48	(101.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,463.28	3,361.48	(101.80)	0.00	
Public Notes:											
2025000276	06066280	RE	2025	GALLAGHER, LOUISA & GALLAGHER, SEAN	8/26/2025	Value	1,288,600	1,206,600	(82,000)		CHANGE VALUE DUE TO AN APPEAL
						Tax	6,437.85	6,028.17	(409.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,437.85	6,028.17	(409.68)	0.00	
Public Notes:											
2025000275	06066284	RE	2025	MILES, ELIZABETH & MILES, MARC E	8/26/2025	Value	1,282,100	1,191,800	(90,300)		CHANGE VALUE DUE TO AN APPEAL
						Tax	6,405.37	5,954.23	(451.14)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,405.37	5,954.23	(451.14)	0.00	
Public Notes:											
2025000274	06069003K	RE	2025	BUTLER, KAROLYN J & BUTLER, ANTHONY G	8/26/2025	Value	1,894,700	1,670,000	(224,700)		CHANGE VALUE DUE TO AN APPEAL
						Tax	8,802.78	7,758.82	(1,043.96)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,802.78	7,758.82	(1,043.96)	0.00	
Public Notes:											
2025000273	06069005A	RE	2025	ROBERTSON, RONALD E	8/26/2025	Value	1,872,300	1,581,500	(290,800)		CHANGE VALUE DUE TO AN APPEAL
						Tax	8,698.71	7,347.65	(1,351.06)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,698.71	7,347.65	(1,351.06)	0.00	
Public Notes:											

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2025000272	06069005G	RE	2025	SCHROEDER, CYNTHIA DIANE & SCHROEDER, STEVEN KENNE	8/26/2025	Value	1,348,100	1,189,400	(158,700)		CHANGE VALUE DUE TO AN APPEAL
						Tax	6,263.27	5,525.95	(737.32)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,263.27	5,525.95	(737.32)	0.00	
Public Notes:						LL	0.00	0.00	0.00		
2025000267	06069113	RE	2025	LOUVIER, RAYMOND A III & LOUVIER, TRACY LYNN	8/25/2025	Value	737,900	704,000	(33,900)		CHANGE VALUE DUE TO AN APPEAL
						Tax	3,686.55	3,517.18	(169.37)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,686.55	3,517.18	(169.37)	0.00	
Public Notes:						LL	0.00	0.00	0.00		
2025000255	06072242	RE	2025	GRAY, ANDREW FRANKLIN & GRAY, OLIVIA REID	8/25/2025	Value	933,700	894,100	(39,600)		CHANGE VALUE DUE TO AN APPEAL
						Tax	4,337.97	4,153.99	(183.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,337.97	4,153.99	(183.98)	0.00	
Public Notes:						LL	0.00	0.00	0.00		
2025000127	06090114	RE	2025	SHRESTHA, MANIJ & SHRESTHA, BIDHYA	8/13/2025	Value	1,325,000	1,262,400	(62,600)		CHANGE VALUE DUE TO AN APPEAL
						Tax	6,619.70	6,306.95	(312.75)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,619.70	6,306.95	(312.75)	0.00	
Public Notes:						LL	0.00	0.00	0.00		
2025000257	06096001	RE	2025	FRAZIER, DOTTIE MADONNA	8/25/2025	Value	365,500	296,800	(68,700)		CHANGE VALUE DUE TO AN APPEAL
						Tax	1,826.04	1,482.81	(343.23)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,826.04	1,482.81	(343.23)	0.00	
Public Notes:						LL	0.00	0.00	0.00		
2025000256	06096127A	RE	2025	ATKINS, JOHN NEIL & ATKINS, KRISTYN T	8/25/2025	Value	1,347,800	1,128,700	(219,100)		CHANGE VALUE DUE TO AN APPEAL
						Tax	6,733.61	5,638.99	(1,094.62)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,733.61	5,638.99	(1,094.62)	0.00	
Public Notes:						LL	0.00	0.00	0.00		

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2025000245	06099223	RE	2025	YOUNG, RICHARD & YOUNG, LAURA	8/25/2025	Value	1,295,300	1,014,000	(281,300)	CHANGE VALUE DUE TO AN APPEAL
						Tax	6,471.32	5,065.94	(1,405.38)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	6,471.32	5,065.94	(1,405.38)	
Public Notes:										
2025000246	06102063	RE	2025	MALHOTRA, MONICA & MALIK, RICKY	8/25/2025	Value	1,611,500	1,529,100	(82,400)	CHANGE VALUE DUE TO AN APPEAL
						Tax	7,487.03	7,104.20	(382.83)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	7,487.03	7,104.20	(382.83)	
Public Notes:										
2025000247	06102230	RE	2025	JONES, MARAYAM & JONES, RYAN	8/25/2025	Value	2,140,600	2,022,800	(117,800)	CHANGE VALUE DUE TO AN APPEAL
						Tax	9,945.23	9,397.93	(547.30)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	9,945.23	9,397.93	(547.30)	
Public Notes:										
2025000248	06102238	RE	2025	HOLEVAS, JIMMY G & HOLEVAS, VICKIE S	8/25/2025	Value	2,624,300	2,492,200	(132,100)	CHANGE VALUE DUE TO AN APPEAL
						Tax	12,192.50	11,578.76	(613.74)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	12,192.50	11,578.76	(613.74)	
Public Notes:										
2025000249	06102271	RE	2025	SMITH, SHARI B & SMITH, C WILLIAM JR	8/25/2025	Value	2,112,900	2,061,100	(51,800)	CHANGE VALUE DUE TO AN APPEAL
						Tax	9,816.53	9,575.87	(240.66)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	9,816.53	9,575.87	(240.66)	
Public Notes:										
2025000250	06102290	RE	2025	HART, DONALD ANTHONY & HART, DEBRA	8/25/2025	Value	2,196,800	2,125,800	(71,000)	CHANGE VALUE DUE TO AN APPEAL
						Tax	10,206.33	9,876.47	(329.86)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	10,206.33	9,876.47	(329.86)	
Public Notes:										

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2025000132	06108576	RE	2025	RONAYNE, THERESA HARMON TR & RONAYNE REVOCABLE TRUST	8/13/2025	Value	741,900	720,200	(21,700)		CHANGE VALUE PER BER
						Tax	5,714.11	5,546.98	(167.13)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,714.11	5,546.98	(167.13)	0.00	
Public Notes:											
2025000139	06117003A	RE	2025	VUONG, STEVEN NHAN & VUONG, BRITTANY	8/13/2025	Value	73,000	69,000	(4,000)		CHANGE VALUE PER BER
						Tax	339.16	320.57	(18.59)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	339.16	320.57	(18.59)	0.00	
Public Notes:											
2025000254	06117236	RE	2025	TILLMAN, HOLLEY ROGERS & TILLMAN, CHAD DUSTIN	8/25/2025	Value	1,330,300	1,281,800	(48,500)		CHANGE VALUE DUE TO AN APPEAL
						Tax	6,646.18	6,403.87	(242.31)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,646.18	6,403.87	(242.31)	0.00	
Public Notes:											
2025000264	06120103	RE	2025	JEFFORDS, DEBORAH S & JEFFORDS, SENDEK L	8/25/2025	Value	922,200	863,900	(58,300)		CHANGE VALUE DUE TO AN APPEAL
						Tax	4,607.31	4,316.04	(291.27)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,607.31	4,316.04	(291.27)	0.00	
Public Notes:											
2025000265	06120245	RE	2025	GILMER, CAROLYN D	8/25/2025	Value	664,400	646,100	(18,300)		CHANGE VALUE DUE TO AN APPEAL
						Tax	3,319.34	3,227.92	(91.42)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,319.34	3,227.92	(91.42)	0.00	
Public Notes:											
2025000266	06123019B	RE	2025	CALLIS, ELIZABETH HOWIE & CALLIS, SHANE JOHN	8/25/2025	Value	1,162,000	1,083,300	(78,700)		CHANGE VALUE DUE TO AN APPEAL
						Tax	5,805.35	5,412.17	(393.18)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,805.35	5,412.17	(393.18)	0.00	
Public Notes:											

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2025000126	06129059	RE	2025	WOOD, SONIA & WOOD, ADAM	8/13/2025	Value 1,808,200	1,342,600	(465,600)		CHANGE VALUE DUE TO AN APPEAL
						Tax 9,033.77	6,707.63	(2,326.14)		
Public Notes:						LL 0.00	0.00	0.00		
						INT 0.00	0.00	0.00		
						Tax TTL 9,033.77	6,707.63	(2,326.14)	0.00	
2025000263	06129117	RE	2025	IOFFE, NICOLE & IOFFE, DMITRIY	8/25/2025	Value 1,061,800	865,100	(196,700)		CHANGE VALUE DUE TO AN APPEAL
						Tax 5,304.75	4,322.04	(982.71)		
Public Notes:						LL 0.00	0.00	0.00		
						INT 0.00	0.00	0.00		
						Tax TTL 5,304.75	4,322.04	(982.71)	0.00	
2025000176	06138028	RE	2024	HELMS, JEFFREY & HELMS, ERICA	8/18/2025	Value 677,900	0	(677,900)		TAX CODE CHANGE
						Tax 4,340.59	0.00	(4,340.59)		
Public Notes:						LL 0.00	0.00	0.00		
						INT 0.00	0.00	0.00		
						Tax TTL 4,340.59	0.00	(4,340.59)	4,340.59	
2025000176	06138028	RE	2023	HELMS, JEFFREY & HELMS, ERICA	8/18/2025	Value 612,200	0	(612,200)		TAX CODE CHANGE
						Tax 3,856.25	0.00	(3,856.25)		
Public Notes:						LL 0.00	0.00	0.00		
						INT 0.00	0.00	0.00		
						Tax TTL 3,856.25	0.00	(3,856.25)	3,962.30	
2025000176	06138028	RE	2022	HELMS, JEFFREY & HELMS, ERICA	8/18/2025	Value 53,000	0	(53,000)		TAX CODE CHANGE
						Tax 333.85	0.00	(333.85)		
Public Notes:						LL 0.00	0.00	0.00		
						INT 0.00	0.00	0.00		
						Tax TTL 333.85	0.00	(333.85)	333.85	
2025000262	06156004B	RE	2025	TURCOTTE, RIZALYN L & TURCOTTE, DANIEL O	8/25/2025	Value 1,092,100	997,800	(94,300)		CHANGE VALUE DUE TO AN APPEAL
						Tax 5,073.90	4,635.78	(438.12)		
Public Notes:						LL 0.00	0.00	0.00		
						INT 0.00	0.00	0.00		
						Tax TTL 5,073.90	4,635.78	(438.12)	0.00	

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2025000277	06168067	RE	2025	O'NEAL, ESTA TRUSTEE & O'NEAL, KEITH TRUSTEE	8/26/2025	Value	446,800	362,300	(84,500)		CHANGE VALUE DUE TO AN APPEAL
						Tax	2,145.53	1,739.76	(405.77)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,145.53	1,739.76	(405.77)	0.00	
Public Notes:											
2025000261	06174073	RE	2025	PURVIANCE, KATHERINE & PURVIANCE, ROBERT J	8/25/2025	Value	1,828,300	1,597,100	(231,200)		CHANGE VALUE DUE TO AN APPEAL
						Tax	9,134.19	7,979.11	(1,155.08)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,134.19	7,979.11	(1,155.08)	0.00	
Public Notes:											
2025000141	06186430	RE	2025	THAKKAR, HETAL A & THAKKAR, ANKIT D	8/13/2025	Value	886,800	818,700	(68,100)		CHANGE VALUE DUE TO AN APPEAL
						Tax	6,691.79	6,177.91	(513.88)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,691.79	6,177.91	(513.88)	0.00	
Public Notes:											
2025000193	06189032	RE	2025	BARRY, DEBORAH	8/19/2025	Value	1,043,700	946,100	(97,600)		CHANGE VALUE DUE TO AN APPEAL
						Tax	5,436.63	4,928.23	(508.40)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,436.63	4,928.23	(508.40)	0.00	
Public Notes:											
2025000225	06189058	RE	2025	SMITH, BEVERLY L & SMITH, BERNARD L	8/21/2025	Value	1,199,500	973,400	(226,100)		CHANGE VALUE DUE TO AN APPEAL
						Tax	6,248.20	5,070.44	(1,177.76)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,248.20	5,070.44	(1,177.76)	0.00	
Public Notes:											
2025000251	06201647	RE	2025	HUNTER OAKS COMMUNITY ASSO	8/25/2025	Value	137,100	0	(137,100)		EXEMPTION STATUS CHANGE
						Tax	636.97	0.00	(636.97)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	636.97	0.00	(636.97)	0.00	
Public Notes:											

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2025000226	06204118	RE	2025	KENNEDY, JERMAINE L	8/21/2025	Value	1,326,000	1,173,000	(153,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,160.60	5,449.76	(710.84)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,160.60	5,449.76	(710.84)	0.00	
2025000252	0639006A	RE	2025	SELBY, PANDORA & ROBINSON, JULIA	8/25/2025	Value	47,600	0	(47,600)		CLERICAL ERROR
Public Notes:						Tax	237.57	0.00	(237.57)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	237.57	0.00	(237.57)	0.00	
2025000253	0639006B	RE	2025	SELBY, PANDORA & ROBINSON, JULIA	8/25/2025	Value	56,100	0	(56,100)		CLERICAL ERROR
Public Notes:						Tax	280.00	0.00	(280.00)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	280.00	0.00	(280.00)	0.00	
2025000131	07012002	RE	2025	PENSCO TRUST CO CUSTODIAN & PENSCO TRUST CO CUSTODI	8/13/2025	Value	165,600	58,000	(107,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,447.68	507.04	(940.64)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,447.68	507.04	(940.64)	0.00	
2025000315	07024018J	RE	2025	HELMS, ZACHARY GARRETT & HELMS, LAUREN ELIZABETH	8/27/2025	Value	973,500	936,700	(36,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,642.62	4,467.12	(175.50)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,642.62	4,467.12	(175.50)	0.00	
2025000130	07027799	RE	2025	ALI, MOOSA	8/13/2025	Value	353,300	330,600	(22,700)		CHANGE VALUE PER BER
Public Notes:						Tax	3,088.55	2,890.11	(198.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,088.55	2,890.11	(198.44)	0.00	

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2025000129	07033033	RE	2025	COX, JANE GILLIAM & COX, CRAIG LOUIS	8/13/2025	Value	683,200	645,200	(38,000)		CHANGE VALUE PER BER
						Tax	4,549.43	4,296.39	(253.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,549.43	4,296.39	(253.04)	0.00	
Public Notes:											
2025000134	07054250	RE	2025	MCCRIMMON, MARTHA W	8/13/2025	Value	237,500	194,600	(42,900)		CHANGE VALUE DUE TO AN APPEAL
						Tax	1,581.52	1,295.84	(285.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,581.52	1,295.84	(285.68)	0.00	
Public Notes:											
2025000316	07057016A	RE	2025	SHOBERT, ELAINE C & SHOBERT, JEFFREY S	8/27/2025	Value	814,700	748,500	(66,200)		CHANGE VALUE DUE TO AN APPEAL
						Tax	3,885.30	3,569.60	(315.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,885.30	3,569.60	(315.70)	0.00	
Public Notes:											
2025000317	07057631	RE	2025	JOHNSON, JOHN R II	8/27/2025	Value	366,400	343,200	(23,200)		CHANGE VALUE DUE TO AN APPEAL
						Tax	2,439.86	2,285.37	(154.49)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,439.86	2,285.37	(154.49)	0.00	
Public Notes:											
2025000228	07058412	RE	2025	KLINGLER, SARAH M & KLINGLER, JASON T	8/21/2025	Value	667,900	644,600	(23,300)		CHANGE VALUE PER BER
						Tax	4,320.65	4,169.92	(150.73)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,320.65	4,169.92	(150.73)	0.00	
Public Notes:											
2025000218	07066011	RE	2025	PJJ HOLDINGS LLC	8/21/2025	Value	246,300	230,900	(15,400)		IMPROVEMENT REMOVED FROM PROPERTY
						Tax	1,593.31	1,493.69	(99.62)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,593.31	1,493.69	(99.62)	0.00	
Public Notes:											

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2025000218	07066011	RE	2024	PJJ HOLDINGS LLC	8/21/2025	Value	175,100	94,100	(81,000)		IMPROVEMENT REMOVED FROM PROPERTY
Public Notes:						Tax	1,443.17	775.57	(667.60)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,443.17	775.57	(667.60)	517.75	
2025000218	07066011	RE	2023	PJJ HOLDINGS LLC	8/21/2025	Value	175,100	94,100	(81,000)		IMPROVEMENT REMOVED FROM PROPERTY
Public Notes:						Tax	1,430.74	768.89	(661.85)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,430.74	768.89	(661.85)	512.00	
2025000133	07066013B	RE	2025	FAITH COMMERCIAL PARTNERS	8/13/2025	Value	1,899,900	902,500	(997,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	12,290.45	5,838.27	(6,452.18)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	12,290.45	5,838.27	(6,452.18)	0.00	
2025000331	07099011C01	RE	2025	TTJ PROPERTIES LLC	8/28/2025	Value	1,003,800	0	(1,003,800)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	4,822.26	0.00	(4,822.26)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,822.26	0.00	(4,822.26)	0.00	
2025000227	07129757	RE	2025	LANGLEY, TABBETHA	8/21/2025	Value	431,600	395,800	(35,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,889.13	2,649.49	(239.64)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,889.13	2,649.49	(239.64)	0.00	
2025000258	07138089	RE	2025	DEMBY, RODNEY L & DEMBY, KAREN C	8/25/2025	Value	909,100	836,900	(72,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,541.86	4,181.15	(360.71)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,541.86	4,181.15	(360.71)	0.00	

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2025000259	07141135	RE	2025	SHEA, KELLY E & SHEA, KEITH M	8/25/2025	Value	747,800	730,800	(17,000)		CHANGE VALUE DUE TO AN APPEAL
						Tax	3,592.43	3,510.76	(81.67)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,592.43	3,510.76	(81.67)	0.00	
Public Notes:											
2025000260	07147137B	RE	2025	GUILLEN, SHARON K & GUILLEN, JIMMIE LEE	8/25/2025	Value	351,900	300,900	(51,000)		CHANGE VALUE DUE TO AN APPEAL
						Tax	1,690.53	1,445.52	(245.01)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,690.53	1,445.52	(245.01)	0.00	
Public Notes:											
2025000324	08231008H	RE	2025	FENNER, RICK S	8/27/2025	Value	392,600	344,700	(47,900)		CHANGE VALUE DUE TO AN APPEAL
						Tax	1,995.19	1,751.77	(243.42)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,995.19	1,751.77	(243.42)	0.00	
Public Notes:											
2025000221	08231118	RE	2025	ZANDROWICZ, SANDRA D	8/21/2025	Value	654,800	620,800	(34,000)		CHANGE VALUE DUE TO AN APPEAL
						Tax	3,327.69	3,154.91	(172.78)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,327.69	3,154.91	(172.78)	0.00	
Public Notes:											
2025000325	08264001E	RE	2025	PRICE, BRITTANY MICHELLE	8/27/2025	Value	409,800	349,200	(60,600)		CHANGE VALUE DUE TO AN APPEAL
						Tax	2,000.64	1,704.79	(295.85)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,000.64	1,704.79	(295.85)	0.00	
Public Notes:											
2025000332	08264022E	RE	2025	SEALS, MONICA R	8/28/2025	Value	428,500	333,100	(95,400)		CHANGE VALUE DUE TO AN APPEAL
						Tax	2,177.64	1,692.81	(484.83)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,177.64	1,692.81	(484.83)	0.00	
Public Notes:											

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2025000333	08267002G	RE	2025	STALLINGS, JEFFREY SHERRIL	8/28/2025	Value	183,400	136,500	(46,900)	CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	895.36	666.39	(228.97)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	895.36	666.39	(228.97)	
2025000322	08291058	RE	2025	BUSKEY, DAVID J & BUSKEY, CHEREE N	8/27/2025	Value	633,400	556,300	(77,100)	CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,184.87	3,675.47	(509.40)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	4,184.87	3,675.47	(509.40)	
2025000323	08303016A	RE	2025	SPRAGUE, GORDON STAFFORD I	8/27/2025	Value	357,100	334,700	(22,400)	CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,727.65	1,619.28	(108.37)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	1,727.65	1,619.28	(108.37)	
2025000321	08324034	RE	2025	PARK, KEY JA & PARK, TAE YOUNG	8/27/2025	Value	867,200	839,300	(27,900)	CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,774.68	5,588.90	(185.78)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	5,774.68	5,588.90	(185.78)	
2025000320	08324106	RE	2025	SOLLENBERGER, SARAH & SOLLENBERGER, NATHAN	8/27/2025	Value	735,700	680,100	(55,600)	CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,899.03	4,528.79	(370.24)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	4,899.03	4,528.79	(370.24)	
2025000319	08324224	RE	2025	BREECE, DEBORAH R TRUSTEE	8/27/2025	Value	650,800	633,100	(17,700)	CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,333.68	4,215.81	(117.87)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	4,333.68	4,215.81	(117.87)	

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2025000283	09022071	RE	2025	PARKER, MILDRED C & PARKER, WILLIAM L	8/26/2025	Value	146,400	102,100	(44,300)	CHANGE VALUE DUE TO AN APPEAL
						Tax	1,106.93	771.98	(334.95)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	1,106.93	771.98	(334.95)	
Public Notes:										
2025000299	09028020	RE	2025	EDELIN, MARY & EDELIN, JOSEPH B JR	8/27/2025	Value	470,600	381,400	(89,200)	CHANGE VALUE DUE TO AN APPEAL
						Tax	2,381.71	1,930.27	(451.44)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	2,381.71	1,930.27	(451.44)	
Public Notes:										
2025000300	09049002U	RE	2025	BEAMON, SHERIKA & BEAMON, LAVORIS	8/27/2025	Value	404,600	374,400	(30,200)	CHANGE VALUE DUE TO AN APPEAL
						Tax	3,059.18	2,830.84	(228.34)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	3,059.18	2,830.84	(228.34)	
Public Notes:										
2025000301	09084011	RE	2025	BROWER, RACHEL & BROWER, RICHARD MARSHAL	8/27/2025	Value	196,900	163,700	(33,200)	CHANGE VALUE DUE TO AN APPEAL
						Tax	1,721.30	1,431.07	(290.23)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	1,721.30	1,431.07	(290.23)	
Public Notes:										
2025000302	09093008A	RE	2025	MOORE, JOHN ADAM	8/27/2025	Value	527,700	415,000	(112,700)	CHANGE VALUE DUE TO AN APPEAL
						Tax	2,670.69	2,100.32	(570.37)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	2,670.69	2,100.32	(570.37)	
Public Notes:										
2025000303	09096004	RE	2025	DECKER, RICHARD & DECKER, LUCILA	8/27/2025	Value	197,000	181,200	(15,800)	CHANGE VALUE DUE TO AN APPEAL
						Tax	942.05	866.50	(75.55)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	942.05	866.50	(75.55)	
Public Notes:										

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2025000304	09105050	RE	2025	BENNETT, TRAVIS R & BENNETT, ANDREA M	8/27/2025	Value	574,800	482,000	(92,800)		CHANGE VALUE DUE TO AN APPEAL
						Tax	5,024.90	4,213.64	(811.26)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,024.90	4,213.64	(811.26)	0.00	
Public Notes:											
2025000305	09105171	RE	2025	CARLSON, MELANIE C & CARLSON, WILLIAM E	8/27/2025	Value	386,000	333,300	(52,700)		CHANGE VALUE DUE TO AN APPEAL
						Tax	3,374.41	2,913.71	(460.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,374.41	2,913.71	(460.70)	0.00	
Public Notes:											
2025000306	09105175	RE	2025	OUTLAW, RANDY CLAYTON & OUTLAW, TERESA RICHARDS	8/27/2025	Value	956,800	886,200	(70,600)		CHANGE VALUE DUE TO AN APPEAL
						Tax	8,364.35	7,747.16	(617.19)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,364.35	7,747.16	(617.19)	0.00	
Public Notes:											
2025000238	09226123A	RE	2025	ONE HOUR MODERNIZING OF NC	8/22/2025	Value	788,300	650,000	(138,300)		CHANGE VALUE DUE TO AN APPEAL
						Tax	6,891.32	5,682.30	(1,209.02)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,891.32	5,682.30	(1,209.02)	0.00	
Public Notes:											
2025000243	09235006	RE	2025	JT BURNS & CO LLC	8/25/2025	Value	350,700	221,000	(129,700)		CHANGE VALUE DUE TO AN APPEAL
						Tax	3,065.82	1,931.98	(1,133.84)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,065.82	1,931.98	(1,133.84)	0.00	
Public Notes:											
2025000138	09247045	RE	2025	GARCIA, MICHAEL P & GARCIA, CINDY D	8/13/2025	Value	434,900	392,000	(42,900)		CHANGE VALUE PER BER
						Tax	1,963.57	1,769.88	(193.69)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,963.57	1,769.88	(193.69)	0.00	
Public Notes:											

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2025000110	09295055	RE	2025	MEKUS, ROCHELLE M & MEKUS, JAMIE L	8/12/2025	Value	525,400	453,600	(71,800)		CHANGE VALUE DUE TO AN APPEAL
						Tax	4,593.05	3,965.37	(627.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,593.05	3,965.37	(627.68)	0.00	
Public Notes:											
2025000234	09298057	RE	2025	SARLOVSKA, JELENA	8/22/2025	Value	123,575	49,775	(73,800)		CHANGE VALUE DUE TO AN APPEAL
						Tax	1,080.29	435.13	(645.16)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,080.29	435.13	(645.16)	0.00	
Public Notes:											
2025000244	09405035	RE	2025	RIENDEAU, VICKI & RIENDEAU, JAMES	8/25/2025	Value	9,000	5,100	(3,900)		CHANGE VALUE DUE TO AN APPEAL
						Tax	43.54	24.67	(18.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	43.54	24.67	(18.87)	0.00	
Public Notes:											
2025000290	383857	PP	2025	SANCHEZ, ARTEMIO	8/26/2025	Value	17,813	0	(17,813)		SOLD PP ASSET
						Tax	137.20	0.00	(137.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	137.20	0.00	(137.20)	0.00	
Public Notes:											
2025000289	400319	PP	2025	WARD, MICHAEL PATRICK	8/26/2025	Value	8,401	0	(8,401)		SOLD PP ASSET
						Tax	40.22	0.00	(40.22)		
						LL	4.02	0.00	(4.02)		
						INT	0.00	0.00	0.00		
						Tax TTL	44.24	0.00	(44.24)	44.24	
Public Notes:											
2025000206	406855	PP	2023		8/20/2025	Value	152,203	0	(152,203)		BUSINESS CLOSED
						Tax	1,018.85	0.00	(1,018.85)		
						LL	101.89	0.00	(101.89)		
						INT	0.00	0.00	0.00		
						Tax TTL	1,120.74	0.00	(1,120.74)	86.35	
Public Notes:											

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2025000084	409305	PP	2025	DLL FINANCE LLC	8/9/2025	Value	56,314	51,034	(5,280)		CLERICAL ERROR
Public Notes:						Tax	261.63	237.10	(24.53)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	261.63	237.10	(24.53)	0.00	
2025000163	409888	PP	2025	FINAL TOUCH CONSTRUCTION I	8/15/2025	Value	1,500	0	(1,500)		BUSINESS CLOSED
Public Notes:						Tax	13.11	0.00	(13.11)		
						LL	1.31	0.00	(1.31)		
						INT	0.00	0.00	0.00		
						Tax TTL	14.42	0.00	(14.42)	0.00	
2025000163	409888	PP	2024	FINAL TOUCH CONSTRUCTION I	8/15/2025	Value	1,500	0	(1,500)		BUSINESS CLOSED
Public Notes:						Tax	16.36	0.00	(16.36)		
						LL	1.64	0.00	(1.64)		
						INT	0.00	0.00	0.00		
						Tax TTL	18.00	0.00	(18.00)	0.00	
2025000343	409908	PP	2025	FIRETHORNE COUNTRY CLUB	8/29/2025	Value	1,610,291	1,610,291	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	8,388.01	8,388.01	0.00		
						LL	838.80	0.00	(838.80)		
						INT	0.00	0.00	0.00		
						Tax TTL	9,226.81	8,388.01	(838.80)	0.00	
2025000293	410185	PP	2025	GENEVA CAPITAL LLC	8/26/2025	Value	11,426	7,399	(4,027)		CLERICAL ERROR
Public Notes:						Tax	76.49	49.53	(26.96)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	76.49	49.53	(26.96)	0.00	
2025000285	412760	PP	2025	NAYOTECH INC	8/26/2025	Value	3,329	0	(3,329)		BUSINESS CLOSED
Public Notes:						Tax	15.88	0.00	(15.88)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	15.88	0.00	(15.88)	0.00	

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2025000285	412760	PP	2024	NAYOTECH INC	8/26/2025	Value	3,823	0	(3,823)		BUSINESS CLOSED
Public Notes:						Tax	24.44	0.00	(24.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	24.44	0.00	(24.44)	0.00	
2025000159	413574	PP	2025	PROSPERITY TRANSPORT SERVI	8/15/2025	Value	4,315	182	(4,133)		SOLD PP ASSET
Public Notes:						Tax	27.91	1.18	(26.73)		
						LL	2.79	0.12	(2.67)		
						INT	0.00	0.00	0.00		
						Tax TTL	30.70	1.30	(29.40)	0.00	
2025000172	413574	PP	2025	PROSPERITY TRANSPORT SERVI	8/18/2025	Value	182	0	(182)		CLERICAL ERROR
Public Notes:						Tax	1.18	0.00	(1.18)		
						LL	0.12	0.00	(0.12)		
						INT	0.00	0.00	0.00		
						Tax TTL	1.30	0.00	(1.30)	0.00	
2025000159	413574	PP	2024	PROSPERITY TRANSPORT SERVI	8/15/2025	Value	4,775	182	(4,593)		SOLD PP ASSET
Public Notes:						Tax	39.36	1.50	(37.86)		
						LL	3.94	0.15	(3.79)		
						INT	0.00	0.00	0.00		
						Tax TTL	43.30	1.65	(41.65)	0.00	
2025000172	413574	PP	2024	PROSPERITY TRANSPORT SERVI	8/18/2025	Value	182	0	(182)		CLERICAL ERROR
Public Notes:						Tax	1.50	0.00	(1.50)		
						LL	0.15	0.00	(0.15)		
						INT	0.00	0.00	0.00		
						Tax TTL	1.65	0.00	(1.65)	0.00	
2025000077	413723	PP	2025	R&D RENOVATIONS LLC	8/7/2025	Value	3,820	0	(3,820)		BUSINESS CLOSED
Public Notes:						Tax	18.65	0.00	(18.65)		
						LL	1.87	0.00	(1.87)		
						INT	0.00	0.00	0.00		
						Tax TTL	20.52	0.00	(20.52)	0.00	

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2025000077	413723	PP	2024	R&D RENOVATIONS LLC	8/7/2025	Value	3,820	0	(3,820)		BUSINESS CLOSED
Public Notes:						Tax	25.05	0.00	(25.05)		
						LL	2.51	0.00	(2.51)		
						INT	0.00	0.00	0.00		
						Tax TTL	27.56	0.00	(27.56)	0.00	
2025000153	413836	PP	2024	REGEANIA DESIGNS LLC	8/15/2025	Value	3,500	0	(3,500)		CLERICAL ERROR
Public Notes:						Tax	22.81	0.00	(22.81)		
						LL	2.28	0.00	(2.28)		
						INT	0.00	0.00	0.00		
						Tax TTL	25.09	0.00	(25.09)	0.00	
2025000213	413859	PP	2025	REMEMBER ME CARDS	8/20/2025	Value	2,767	0	(2,767)		BUSINESS CLOSED
Public Notes:						Tax	13.48	0.00	(13.48)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	13.48	0.00	(13.48)	0.00	
2025000278	414695	PP	2025	STARBUCKS CORPORATION	8/26/2025	Value	167,524	167,524	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	1,095.27	1,095.27	0.00		
						LL	109.53	0.00	(109.53)		
						INT	0.00	0.00	0.00		
						Tax TTL	1,204.80	1,095.27	(109.53)	0.00	
2025000279	414696	PP	2025	STARBUCKS CORPORATION	8/26/2025	Value	372,410	372,410	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	3,255.61	3,255.61	0.00		
						LL	325.56	0.00	(325.56)		
						INT	0.00	0.00	0.00		
						Tax TTL	3,581.17	3,255.61	(325.56)	0.00	
2025000280	414697	PP	2025	STARBUCKS COROPORATION	8/26/2025	Value	176,895	176,895	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	821.85	821.85	0.00		
						LL	82.19	0.00	(82.19)		
						INT	0.00	0.00	0.00		
						Tax TTL	904.04	821.85	(82.19)	0.00	

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2025000240	415824	PP	2025	VINYL AVENUE LLC	8/22/2025	Value	4,150	0	(4,150)		CLERICAL ERROR
Public Notes:						Tax	27.13	0.00	(27.13)		
						LL	2.71	0.00	(2.71)		
						INT	0.00	0.00	0.00		
						Tax TTL	29.84	0.00	(29.84)	0.00	
2025000240	415824	PP	2024	VINYL AVENUE LLC	8/22/2025	Value	4,150	0	(4,150)		CLERICAL ERROR
Public Notes:						Tax	34.73	0.00	(34.73)		
						LL	3.47	0.00	(3.47)		
						INT	0.00	0.00	0.00		
						Tax TTL	38.20	0.00	(38.20)	0.00	
2025000169	598143	PP	2025	GARCIA, EDWIN SERGIO	8/15/2025	Value	3,675	1,470	(2,205)		SOLD PP ASSET
Public Notes:						Tax	32.13	12.85	(19.28)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	32.13	12.85	(19.28)	0.00	
2025000122	600052	PP	2025	BIG BLUE MARBLE ACADEMY LL	8/13/2025	Value	185,274	185,274	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	1,211.32	1,211.32	0.00		
						LL	121.13	0.00	(121.13)		
						INT	0.00	0.00	0.00		
						Tax TTL	1,332.45	1,211.32	(121.13)	0.00	
2025000121	600145	PP	2025	BIG BLUE MARBLE ACADEMY LL	8/13/2025	Value	137,989	137,989	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	1,062.79	1,062.79	0.00		
						LL	106.28	0.00	(106.28)		
						INT	0.00	0.00	0.00		
						Tax TTL	1,169.07	1,062.79	(106.28)	0.00	
2025000154	606403	PP	2025	GARCIA, JOHAN JESUS	8/15/2025	Value	2,553	0	(2,553)		SOLD PP ASSET
Public Notes:						Tax	19.66	0.00	(19.66)		
						LL	1.97	0.00	(1.97)		
						INT	0.00	0.00	0.00		
						Tax TTL	21.63	0.00	(21.63)	0.00	

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2025000200	613835	PP	2025	STARBUCKS CORPORATION	8/19/2025	Value	242,090	242,090	0		LATE LIST
Public Notes:						Tax	1,574.55	1,574.55	0.00		PENALTY CHANGE
						LL	157.46	0.00	(157.46)		
						INT	0.00	0.00	0.00		
						Tax TTL	1,732.01	1,574.55	(157.46)	0.00	
2025000291	620731	PP	2025	SAGANICH, ROBERT LEE	8/26/2025	Value	1,084	0	(1,084)		SOLD PP ASSET
Public Notes:						Tax	5.28	0.00	(5.28)		
						LL	0.53	0.00	(0.53)		
						INT	0.00	0.00	0.00		
						Tax TTL	5.81	0.00	(5.81)	0.00	
2025000342	624451	PP	2025	BURLINGTON COAT FACTORY WA	8/29/2025	Value	418,310	418,310	0		LATE LIST
Public Notes:						Tax	3,656.87	3,656.87	0.00		PENALTY CHANGE
						LL	365.69	0.00	(365.69)		
						INT	0.00	0.00	0.00		
						Tax TTL	4,022.56	3,656.87	(365.69)	0.00	
2025000185	630737	PP	2024	DAVIS, UMARIN CHANYIM	8/18/2025	Value	7,220	0	(7,220)		SOLD PP ASSET
Public Notes:						Tax	46.15	0.00	(46.15)		
						LL	4.62	0.00	(4.62)		
						INT	0.00	0.00	0.00		
						Tax TTL	50.77	0.00	(50.77)	0.00	
2025000271	631281	PP	2025	NEWELL, JERRY RICHARD	8/26/2025	Value	2,145	0	(2,145)		SOLD PP ASSET
Public Notes:						Tax	9.89	0.00	(9.89)		
						LL	0.99	0.00	(0.99)		
						INT	0.00	0.00	0.00		
						Tax TTL	10.88	0.00	(10.88)	0.00	
2025000089	644753	PP	2024	SIMPKINS, DANIEL KENNETH	8/9/2025	Value	4,142	0	(4,142)		SOLD PP ASSET
Public Notes:						Tax	45.17	0.00	(45.17)		
						LL	4.52	0.00	(4.52)		
						INT	0.00	0.00	0.00		
						Tax TTL	49.69	0.00	(49.69)	0.00	

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2025000164	645875	PP	2025	YOAB TRUCKING LLC	8/15/2025	Value	75,414	32,476	(42,938)		SOLD PP ASSET
Public Notes:						Tax	493.06	212.33	(280.73)		
						LL	49.31	21.23	(28.08)		
						INT	0.00	0.00	0.00		
						Tax TTL	542.37	233.56	(308.81)	0.00	
2025000083	651543	PP	2025	DLL FINANCE LLC	8/9/2025	Value	14,426	10,732	(3,694)		CLERICAL ERROR
Public Notes:						Tax	96.06	71.46	(24.60)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	96.06	71.46	(24.60)	0.00	
2025000101	653225	PP	2023		8/11/2025	Value	29,018	0	(29,018)		TAXPAYER MOVED
Public Notes:						Tax	316.44	0.00	(316.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	316.44	0.00	(316.44)	0.00	
2025000165	655873	PP	2025	CIELOS CAPITAL LLC	8/15/2025	Value	960,000	0	(960,000)		SOLD PP ASSET
Public Notes:						Tax	8,392.32	0.00	(8,392.32)		
						LL	839.23	0.00	(839.23)		
						INT	0.00	0.00	0.00		
						Tax TTL	9,231.55	0.00	(9,231.55)	0.00	
2025000229	657771	PP	2025	CINTRON, DAVID	8/22/2025	Value	15,086	1,520	(13,566)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	73.48	7.40	(66.08)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	73.48	7.40	(66.08)	0.00	
2025000170	658458	PP	2025	SM LOGISTICS NC LLC	8/15/2025	Value	67,792	67,792	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	592.64	592.64	0.00		
						LL	59.26	0.00	(59.26)		
						INT	0.00	0.00	0.00		
						Tax TTL	651.90	592.64	(59.26)	0.00	

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2025000207	658970	PP	2025	SVINARYOV, SERGEY	8/20/2025	Value	80,546	48,056	(32,490)		SOLD PP ASSET
Public Notes:						Tax	411.35	245.42	(165.93)		
						LL	41.14	24.54	(16.60)		
						INT	0.00	0.00	0.00		
						Tax TTL	452.49	269.96	(182.53)	0.00	
2025000286	661872	PP	2024	BRODSKY, STEVE	8/26/2025	Value	24,714	0	(24,714)		DUPLICATE ASSESSMENT
Public Notes:						Tax	269.51	0.00	(269.51)		
						LL	53.90	0.00	(53.90)		
						INT	0.00	0.00	0.00		
						Tax TTL	323.41	0.00	(323.41)	0.00	
2025000329	661911	PP	2025	CUMMINGS, ROBERT ALAN	8/28/2025	Value	8,646	0	(8,646)		TAXPAYER MOVED
Public Notes:						Tax	45.04	0.00	(45.04)		
						LL	4.50	0.00	(4.50)		
						INT	0.00	0.00	0.00		
						Tax TTL	49.54	0.00	(49.54)	0.00	
2025000082	662364	PP	2024	FAUSER, ROBERT EDWARD & FAUSER, JENNIFER DAVIS	8/9/2025	Value	11,370	0	(11,370)		DUPLICATE ASSESSMENT
Public Notes:						Tax	97.24	0.00	(97.24)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	97.24	0.00	(97.24)	0.00	
2025000081	662526	PP	2024	BROWER, LISA BELK & BROWER, DAVID WILLIAM	8/8/2025	Value	49,215	0	(49,215)		TAXPAYER MOVED
Public Notes:						Tax	422.02	0.00	(422.02)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	422.02	0.00	(422.02)	0.00	
2025000188	662705	PP	2024	SMITH, LAUREN ELIZABETH	8/18/2025	Value	46,650	0	(46,650)		TAXPAYER MOVED
Public Notes:						Tax	292.87	0.00	(292.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	292.87	0.00	(292.87)	0.00	

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2025000296	663462	PP	2024	SHINING LIGHT BAPTIST CHU	8/26/2025	Value	10,773	0	(10,773)	EXEMPTION STATUS CHANGE
Public Notes:						Tax	117.48	0.00	(117.48)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	117.48	0.00	(117.48)	
2025000184	663603	PP	2024	UNION COUNTY COMMUNITY AC	8/18/2025	Value	1,154	0	(1,154)	EXEMPTION STATUS CHANGE
Public Notes:						Tax	12.58	0.00	(12.58)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	12.58	0.00	(12.58)	
2025000190	663733	PP	2024	PETRIN, JASON PAUL & PETRIN, NICOLE DANIELLE	8/18/2025	Value	17,214	0	(17,214)	DUPLICATE ASSESSMENT
Public Notes:						Tax	141.88	0.00	(141.88)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	141.88	0.00	(141.88)	
2025000180	663736	PP	2024	JAIN, HARSH KAPOORCHAND	8/18/2025	Value	64,025	0	(64,025)	TAXPAYER MOVED
Public Notes:						Tax	698.19	0.00	(698.19)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	698.19	0.00	(698.19)	
2025000330	663779	PP	2024	WILLIAMS, TIMOTHY ANDRE	8/28/2025	Value	5,360	1,563	(3,797)	TAXPAYER MOVED
Public Notes:						Tax	58.45	17.04	(41.41)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	58.45	17.04	(41.41)	
2025000214	663989	PP	2024	HEDDRICK, ROBERT JOHN	8/20/2025	Value	1,066	0	(1,066)	DUPLICATE ASSESSMENT
Public Notes:						Tax	8.81	0.00	(8.81)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	8.81	0.00	(8.81)	

Correction Listing Report

Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000294	664277	PP	2024	CARPENTER, BRYANNA ASHLEE	8/26/2025	Value	57,843	6,805	(51,038)		TAXPAYER MOVED
Public Notes:						Tax	593.06	69.77	(523.29)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	593.06	69.77	(523.29)	0.00	
2025000181	664358	PP	2024	JONATHAN MILLS TRUCKING L	8/18/2025	Value	935	0	(935)		SOLD PP ASSET
Public Notes:						Tax	5.50	0.00	(5.50)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5.50	0.00	(5.50)	0.00	
2025000192	664526	PP	2024	URBAN, WILLIAM PETER	8/18/2025	Value	4,492	0	(4,492)		DUPLICATE ASSESSMENT
Public Notes:						Tax	28.20	0.00	(28.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	28.20	0.00	(28.20)	0.00	
2025000079	664559	PP	2024	MOORE, JAMES STEPHEN & MOORE, KATRINA DAVIS	8/8/2025	Value	58,710	0	(58,710)		TAXPAYER MOVED
Public Notes:						Tax	378.27	0.00	(378.27)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	378.27	0.00	(378.27)	0.00	
2025000327	664653	PP	2024	JONES, PATRICIA KIRKLEY	8/28/2025	Value	10,210	0	(10,210)		TAXPAYER MOVED
Public Notes:						Tax	104.68	0.00	(104.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	104.68	0.00	(104.68)	0.00	
2025000113	664737	PP	2024	FERNANDEZ, NICHOLAS JOHN	8/12/2025	Value	61,102	0	(61,102)		TAXPAYER MOVED
Public Notes:						Tax	626.48	0.00	(626.48)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	626.48	0.00	(626.48)	0.00	

Correction Listing Report

Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000182	664785	PP	2024	WILSON, DONNA TOLLESON & WILSON, JOSHUA MICHAEL	8/18/2025	Value	85,425	0	(85,425)		TAXPAYER MOVED
Public Notes:						Tax	546.98	0.00	(546.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	546.98	0.00	(546.98)	0.00	
2025000114	664820	PP	2024	AVILES, JASHUA JAYCUP	8/12/2025	Value	3,308	0	(3,308)		TAXPAYER MOVED
Public Notes:						Tax	33.92	0.00	(33.92)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	33.92	0.00	(33.92)	0.00	
2025000078	664895	PP	2024	MOORE, JAMES STEPHEN	8/8/2025	Value	61,985	0	(61,985)		TAXPAYER MOVED
Public Notes:						Tax	399.37	0.00	(399.37)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	399.37	0.00	(399.37)	0.00	
2025000217	666108	PP	2024	PERKINS, DEANNA LYNN	8/21/2025	Value	27,820	0	(27,820)		TAXPAYER MOVED
Public Notes:						Tax	303.38	0.00	(303.38)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	303.38	0.00	(303.38)	0.00	
2025000297	666829	PP	2024	HARTING, ELLEN MARIE & HARTING, THOMAS ARTHUR	8/26/2025	Value	76,242	0	(76,242)		TAXPAYER MOVED
Public Notes:						Tax	488.18	0.00	(488.18)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	488.18	0.00	(488.18)	0.00	
2025000298	667568	PP	2024	SINAY, KATHLEEN SUSAN	8/26/2025	Value	65,925	0	(65,925)		SOLD PP ASSET
Public Notes:						Tax	424.75	0.00	(424.75)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	424.75	0.00	(424.75)	0.00	

Correction Listing Report

Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted	Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000235	667589	PP	2024	BLOWERS, JACK THOMAS	8/22/2025	Value	18,560	0	(18,560)	DUPLICATE ASSESSMENT
Public Notes:						Tax	121.16	0.00	(121.16)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	121.16	0.00	(121.16)	
2025000211	667702	PP	2024	HANCE, TYLER ERIC & HANCE, JENNIFER SIERRA	8/20/2025	Value	27,172	0	(27,172)	TAXPAYER MOVED
Public Notes:						Tax	296.31	0.00	(296.31)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	296.31	0.00	(296.31)	
2025000326	667737	PP	2024	IANNONE, DEBORAH LEE	8/28/2025	Value	2,530	0	(2,530)	TAXPAYER MOVED
Public Notes:						Tax	27.59	0.00	(27.59)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	27.59	0.00	(27.59)	
2025000210	667781	PP	2024	HANCE, TYLER ERIC & HANCE, JENNIFER SIERRA	8/20/2025	Value	62,520	0	(62,520)	TAXPAYER MOVED
Public Notes:						Tax	681.78	0.00	(681.78)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	681.78	0.00	(681.78)	
2025000189	667839	PP	2024	FITCHETT, DUANE ALLEN	8/18/2025	Value	8,867	0	(8,867)	DUPLICATE ASSESSMENT
Public Notes:						Tax	59.91	0.00	(59.91)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	59.91	0.00	(59.91)	
2025000187	668143	PP	2024	SILVA-CRUZ, JULIAN CAMILO	8/18/2025	Value	26,440	0	(26,440)	TAXPAYER MOVED
Public Notes:						Tax	271.09	0.00	(271.09)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	271.09	0.00	(271.09)	

Correction Listing Report

Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000292	668387	PP	2024	ATWATER, JOHN THOMAS	8/26/2025	Value	8,060	0	(8,060)		DUPLICATE ASSESSMENT
Public Notes:						Tax	87.89	0.00	(87.89)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	87.89	0.00	(87.89)	0.00	
2025000191	668535	PP	2024	WILLIAMS, ROBERT DANIEL	8/18/2025	Value	3,110	0	(3,110)		DUPLICATE ASSESSMENT
Public Notes:						Tax	20.95	0.00	(20.95)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	20.95	0.00	(20.95)	0.00	
2025000186	668587	PP	2024	RUSSELL, KAY DAVIS	8/18/2025	Value	27,071	0	(27,071)		TAXPAYER MOVED
Public Notes:						Tax	295.21	0.00	(295.21)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	295.21	0.00	(295.21)	0.00	
2025000215	668618	PP	2024	GRIFFIN, DONALD BRUCE & GRIFFIN, MARTHA FUNDERB	8/20/2025	Value	5,093	0	(5,093)		DUPLICATE ASSESSMENT
Public Notes:						Tax	31.84	0.00	(31.84)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	31.84	0.00	(31.84)	0.00	
2025000328	668753	PP	2024	SHARMA, MANISH	8/28/2025	Value	59,430	0	(59,430)		TAXPAYER MOVED
Public Notes:						Tax	609.34	0.00	(609.34)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	609.34	0.00	(609.34)	0.00	

Correction Listing Report

Union County

Date Posted between 8/1/2025 and 8/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000318	K8291061	RE	2025	LEMMOND, WILLIAM HUNTER II & LEMMOND, VALERIE V	8/27/2025	Value	583,000	504,400	(78,600)		CHANGE VALUE DUE TO AN APPEAL
						Tax	3,771.43	3,262.96	(508.47)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,771.43	3,262.96	(508.47)	0.00	
Totals for Type Value Change - Release :						Value	84,665,966	70,505,169	(14,160,797)		
						Tax	481,175.15	390,859.93	(90,315.22)		
						LL	3,295.31	46.04	(3,249.27)		
						INT	0.00	0.00	0.00		
						Tax TTL	484,470.46	390,905.97	(93,564.49)	10,249.90	
Grand Totals :	Year	Refund Amount				Value	782,841,429	799,500,020	16,658,591		
		10,249.90				Tax	8,253,640.09	8,388,734.78	135,094.69		
						LL	6,338.11	21,943.60	15,605.49		
						INT	0.00	9,764.80	9,764.80		
						Tax TTL	8,259,978.20	8,420,443.18	160,464.98	10,249.90	



Union County, NC

Staff Report

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

File #: 25-597

Agenda Date: 10/6/2025

TITLE:

August 2025 NCVTS Motor Vehicle Tax Report

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve the August 2025 NCVTS Motor Vehicle Tax Refund Report.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

\$1,387.65



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change	
BRANTLEY, DENNIS FRANKLIN	BRANTLEY, DENNIS FRANKLIN		4006 HMY 205		MARSHVILLE, NC 28103	Adjustment >=\$100	0080878482	TM2949	PENDING	930835632	Refund Generated due to adjustment on Bill #0080878482-2024-2024-0000	Situs error	8/21/2025		001	TAX	\$0.00	\$0.00	\$0.00	
															200	TAX	(\$263.41)	\$0.00	(\$263.41)	
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
															017	TAX	\$30.82	\$0.00	\$30.82	
															003	TAX	\$0.00	\$0.00	\$0.00	
															005	TAX	\$0.00	\$0.00	\$0.00	
															004	TAX	\$0.00	\$0.00	\$0.00	
															002	TAX	\$0.00	\$0.00	\$0.00	
															Refund					\$262.59
															001	TAX	\$0.00	\$0.00	\$0.00	
H&A ELECTRIC LLC	H&A ELECTRIC LLC		4406 JOHN HARGETTE RD		MARSHVILLE, NC 28103	Adjustment >=\$100	0080966431	TW0013	PENDING	930835712	Refund Generated due to adjustment on Bill #0080966431-2024-2024-0000	Situs error	8/21/2025		200	TAX	(\$241.14)	(\$12.06)	(\$253.20)	
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
															017	TAX	\$28.22	\$1.41	\$29.63	
															003	TAX	\$0.00	\$0.00	\$0.00	
															005	TAX	\$0.00	\$0.00	\$0.00	
															004	TAX	\$0.00	\$0.00	\$0.00	
															002	TAX	\$0.00	\$0.00	\$0.00	
															Refund					\$253.57
															001	TAX	(\$18.37)	\$0.00	(\$18.37)	
															500	TAX	(\$43.35)	\$0.00	(\$43.35)	
IMANI, MOHAMMADREZA	IMANI, MOHAMMADREZA	NASR ESFAHANI, BEHNAZ	8210 DENHOLME DR		MAXHAW, NC 28173	Adjustment >=\$100	0084253834	LCX3621	PENDING	931791552	Refund Generated due to adjustment on Bill #0084253834-2024-2024-0000-00	Mileage	8/25/2025		001	TAX	(\$18.37)	\$0.00	(\$18.37)	
															500	TAX	(\$43.35)	\$0.00	(\$43.35)	
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
															028	TAX	(\$5.89)	\$0.00	(\$5.89)	
															003	TAX	(\$1.97)	\$0.00	(\$1.97)	
															005	TAX	(\$0.44)	\$0.00	(\$0.44)	
															004	TAX	(\$3.29)	\$0.00	(\$3.29)	
															002	TAX	(\$42.14)	\$0.00	(\$42.14)	
															Refund					\$115.45
															001	TAX	\$0.00	\$0.00	\$0.00	
MENDOZA MOLINA, VERONICA	MENDOZA MOLINA, VERONICA	MADRID HERNANDEZ, EDRAS JESUS	3204 OLD MONROE MARSHVILL	3204	WINGATE, NC 28174	Adjustment >=\$100	0081078007	RJC6253	PENDING	930835184	Refund Generated due to adjustment on Bill #0081078007-2024-2024-0000	Situs error	8/21/2025		200	TAX	(\$214.12)	(\$10.70)	(\$224.82)	
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
															022	TAX	\$36.43	\$1.82	\$38.25	
															003	TAX	\$0.00	\$0.00	\$0.00	
															005	TAX	\$0.00	\$0.00	\$0.00	
															004	TAX	\$0.00	\$0.00	\$0.00	
															002	TAX	\$0.00	\$0.00	\$0.00	
															Refund					\$216.57
															001	TAX	\$0.00	\$0.00	\$0.00	
															600	TAX	\$73.98	\$4.81	\$78.79	
SALIA, ROSEMOND	SALIA, ROSEMOND		1517 NATIVE DIVER LN		INDIAN TRAIL, NC 28079	Adjustment >=\$100	0083224646	KED9000	PENDING	1046558628	Refund Generated due to adjustment on Bill #0083224646-2024-2024-0000	Situs error	8/19/2025		200	TAX	(\$200.95)	(\$13.06)	(\$214.01)	
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
															023	TAX	\$20.47	\$1.33	\$21.80	
															003	TAX	\$0.00	(\$0.01)	(\$0.01)	
															005	TAX	\$0.00	\$0.00	\$0.00	
															004	TAX	\$0.00	\$0.00	\$0.00	
															002	TAX	\$0.00	\$0.00	\$0.00	
															Refund					\$143.43
															001	TAX	(\$15.24)	\$0.00	(\$15.24)	
															200	TAX	(\$59.65)	\$0.00	(\$59.65)	
SECRET, WESLEY NEAL	SECRET, WESLEY NEAL		4621 SECRET SHORTCUT RD		MONROE, NC 28110	Adjustment >=\$100	0086724935	CS17262	PENDING	696642114	Refund Generated due to adjustment on Bill #0086724935-2025-2025-0000-00	Over Assessment	8/12/2025		003	TAX	(\$1.44)	\$0.00	(\$1.44)	
															005	TAX	(\$0.61)	\$0.00	(\$0.61)	
															004	TAX	(\$5.28)	\$0.00	(\$5.28)	
															002	TAX	(\$36.31)	\$0.00	(\$36.31)	
															Refund					\$118.53
															001	TAX	\$0.00	\$0.00	\$0.00	
															200	TAX	(\$214.99)	\$0.00	(\$214.99)	
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
															700	TAX	\$92.42	\$0.00	\$92.42	
															020	TAX	\$22.89	\$0.00	\$22.89	
SMENSON, ELIZABETH JANE	SMENSON, ELIZABETH JANE		2302 AUTUMN OLIVE LN		MATTHEWS, NC 28104	Adjustment >=\$100	0081069061	LCT6595	PENDING	1047189258	Refund Generated due to adjustment on Bill #0081069061-2024-2024-0000	Situs error	8/21/2025		003	TAX	\$0.00	\$0.00	\$0.00	
															005	TAX	\$0.00	\$0.00	\$0.00	
															004	TAX	\$0.00	\$0.00	\$0.00	
															002	TAX	\$0.00	\$0.00	\$0.00	
															Refund					\$129.68
															001	TAX	\$0.00	\$0.00	\$0.00	
															200	TAX	(\$126.30)	(\$6.32)	(\$132.70)	
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
															070	TAX	\$4.15	\$0.21	\$4.36	
															026	TAX	\$10.01	\$0.50	\$10.51	
TILLMAN, JAMES WILLIAM	TILLMAN, JAMES WILLIAM		5807 MAXHAW INDIAN TRAIL RD		MATTHEWS, NC 28104	Adjustment >=\$100	0081969609	HD3684R	PENDING	1047191535	Refund Generated due to adjustment on Bill #0081969609-2024-2024-0000	Situs error	8/21/2025		003	TAX	\$0.00	\$0.00	\$0.00	
															005	TAX	\$0.00	\$0.00	\$0.00	
															004	TAX	\$0.00	\$0.00	\$0.00	
															002	TAX	\$0.00	\$0.00	\$0.00	
															Refund					\$147.83
															Refund Total					\$1387.65



Union County, NC

Staff Report

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

File #: 25-589

Agenda Date: 10/6/2025

TITLE:

Resolution - Surplus Vehicle Sale

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

BACKGROUND:

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

The sale will begin October 8, 2025, at 9:00 AM and end October 21, 2025, with incremental closings as indicated on Attachment A. A summary of the vehicle information is listed below. Additional vehicle information can be found on Attachment A.

Facilities and Fleet Management

- (1) 2007 CHEVROLET COLORADO

Union County Water

- (1) 2004 CHEVROLET EXPRESS
- (1) 2004 CHEVROLET C8500

UCSO

- (1) 2002 CHEVROLET SILVERADO 2500
- (1) 2012 DODGE CHARGER
- (1) 2012 FORD F150

Solid Waste

- (1) FORD F150 4X4

Building Code Enforcement

- (1) 2013 FORD F150

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

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

FINANCIAL IMPACT:

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

RESOLUTION AUTHORIZING SURPLUS PROPERTY SALE BY INTERNET AUCTION

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

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

NOW, THEREFORE, BE IT HEREBY RESOLVED by the Union County Board of Commissioners that the items of personal property included on Attachment “A” and incorporated herein by reference, be declared surplus and that the Procurement Manager or her designee be authorized to sell at electronic auction, beginning October 8, 2025, at 9:00 a.m. and ending October 21, 2025, with incremental closings as indicated on Attachment “A”, the surplus property described on Attachment “A”, as per the terms and conditions as specified in the County’s existing contract with the on-line auction Service Provider to the highest bidders.

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

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

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

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

Adopted this 6th day of October 2025

ATTEST:

Lynn G. West, Clerk to the Board

Melissa Merrell, Chair

Attachment A

Tag Number	Description	Serial/Parcel	Mileage	Department	Auction Start	Auction End
44-06	2004 Chevrolet Express	1GCHC392761183338	71,213	UC Water	10/8/2025 9:00	10/21/2025 9:00
40-02	2002 Chevrolet Silverado 2500	1GCHK29U82E280769	180,029	UCSO	10/8/2025 9:00	10/21/2025 9:10
48-07	2007 Chevrolet Colorado	1GCCS19EX78209995	74,102	Facilities and Fleet Management	10/8/2025 9:00	10/21/2025 9:20
07-12	2012 Dodge Charger	2C3CDXAT6CH201487	124,947	UCSO	10/8/2025 9:00	10/21/2025 9:30
30-13	2013 Ford F150 4x4	1FTMF1EF2DFC43931	149,838	Solid Waste	10/8/2025 9:00	10/21/2025 9:40
43-13	2013 Ford F150	1FTEX1CM3DKF87181	146,066	Building Code Enforcement	10/8/2025 9:00	10/21/2025 9:50
53-04	2004 Chevrolet C8500	1GBM8C1C24F516405	27,295	UC Water	10/8/2025 9:00	10/21/2025 10:00
14-12	2012 Ford F150	1FTFX1EF6CFB16068	199,088	UCSO	10/8/2025 9:00	10/21/2025 10:10



Union County, NC

Staff Report

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

File #: 25-613

Agenda Date: 10/6/2025

TITLE:

Resolutions - Donation of Surplus Property to Town of Fairview & Union County Public Schools

INFORMATION CONTACT:

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

ACTION REQUESTED:

Adopt Resolutions Authorizing Conveyance of Certain Surplus Property to Town of Fairview and Union County Public Schools.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County desires to declare surplus and donate one mower and one truck to Town of Fairview and two trucks to Forest Hills High School's Automotive and Agriculture programs.

Town of Fairview:

- 1) Union County Hustler Mower 60" Mowing Deck
- 2) Union County Vehicle # 30-07: 2007 Ford F150

Union County Public Schools - Forest Hills High School:

- 1) Union County Vehicle # 36-02: 2002 Ford F250 4x4
- 2) Union County Vehicle # 04-14: 2014 Ford F250 4x4

FINANCIAL IMPACT:

None.



OFFICE OF THE COMMISSIONERS AND MANAGER

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

RESOLUTION AUTHORIZING CONVEYANCE OF CERTAIN UNION COUNTY SURPLUS PROPERTY TO THE TOWN OF FAIRVIEW

WHEREAS, Union County is the owner of a 2007 Ford F150 4x4 identified by County Number 30-07 and a Hustler lawn mower, model 932723 with Serial # 14105889 (the “Subject Property”); and

WHEREAS, Union County desires to declare surplus and convey the Subject Property to the Town of Fairview; and

WHEREAS, pursuant to G.S § 160A-274, Union County is authorized to convey to any other governmental unit any interest in real or personal property, with or without consideration.

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

1. The Subject Property is hereby declared surplus.
2. The County Manager is authorized to convey the Subject Property to the Town of Fairview in accordance with G.S. § 160A-274, and to execute such documents of conveyance as may be necessary to transfer ownership of the Subject Property. There shall be no monetary consideration given for this conveyance of the Subject Property to the Town of Fairview.

Adopted this the 6th day of October, 2025

Attest:

Lynn G. West
Clerk to the Board

Melissa Merrell
Chair, Union County Board of Commissioners



OFFICE OF THE COMMISSIONERS AND MANAGER

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

RESOLUTION AUTHORIZING CONVEYANCE OF CERTAIN UNION COUNTY SURPLUS PROPERTY TO THE UNION COUNTY BOARD OF EDUCATION

WHEREAS, Union County is the owner of two motor vehicles, a 2002 Ford F250 4x4 extended cab identified by County Number 36-02, and a 2014 Ford F250 4x4 single cab, identified by County Number 04-14 (the “Subject Property”); and

WHEREAS, Union County desires to declare surplus and convey the Subject Property to the Union County Board of Education; and

WHEREAS, pursuant to G.S § 160A-274, Union County is authorized to convey to any other governmental unit any interest in real or personal property, with or without consideration.

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

1. The Subject Property is hereby declared surplus.
2. The County Manager is authorized to convey the Subject Property to the Union County Board of Education in accordance with G.S. § 160A-274, and to execute such documents of conveyance as may be necessary to transfer ownership of the Subject Property. There shall be no monetary consideration given for this conveyance of the Subject Property to the Union County Board of Education.

Adopted this the 6th day of October, 2025

Attest:

Lynn G. West
Clerk to the Board

Melissa Merrell
Chair, Union County Board of Commissioners



Union County, NC

Staff Report

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

File #: 25-601

Agenda Date: 10/6/2025

TITLE:

Travel Policy Revision for International Travel

INFORMATION CONTACT:

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

ACTION REQUESTED:

Adopt Revised Travel Policy to include language for international travel.

PRIOR BOARD ACTIONS:

Travel Policy was adopted February 17, 2014, and revised on August 14, 2023.

BACKGROUND:

The currently adopted Travel Policy does not include any parameters or guidelines for international travel. Over the past year Union County has hired Economic Development employees that travel internationally for trade shows and other economic development opportunities. Based on this need Management and Staff are recommending revising the Travel Policy to include parameters and guidelines for international travel.

FINANCIAL IMPACT:

None.

UNION COUNTY TRAVEL POLICY

Adopted February 17, 2014

Revised August 14, 2023

Revised October 6, 2025

I. Purpose

The purpose of this Policy is to establish guidelines for the County's payment of transportation, lodging, meals, and incidental travel expenses for County employees and authorized Agents who travel on official county business to attend schools, conferences, seminars, conventions, meetings, and for other designated purposes.

II. Applicability

This policy applies to all County employees and to any agents of the County who travel on Official County Business, when the County is responsible for paying or reimbursing travel expenses. All travel must be conducted in accordance with the guidelines outlined in this policy.

III. Definitions

Wherever used in this Policy and printed with initial capital letters, the terms listed below will have the meanings indicated.

- A. Agent** - Any officer, official, volunteer, board member, appointee, or other person authorized to conduct Official County Business.
- B. Business Meal** - A meal with a clearly substantiated business purpose directly associated with conducting Official County Business.
- C. County** - Union County, North Carolina.
- D. Covered Person** - Any County employee or Agent who is subject to the provisions of this Policy in accordance with Section II.
- E. County Manager** - The County Manager of Union County and the County Manager's designee, including Deputy County Manager and Assistant County Manager.
- F. Day Travel** - Trips taken where the time from departure to return is less than twelve (12) hours and no overnight stay is required.
- G. Director** - The Director of a County Department, and the Director's designee, if any. For purposes of this Policy, "Director" also includes the Sheriff, Register of Deeds, and County Attorney. When Director approval is required for a Covered Person, it refers to the Director of the department in which the Covered Person is employed, or, for Agents, the Director with whom such Agent is most closely affiliated.

H. Incidental Travel Expenses - Minor customary travel-related expenses including fees and tips given to porters, baggage carriers, bellhops, hotel staff, and ship staff.

I. IRS Rate - The Business Standard Mileage Rate published by the Internal Revenue Service in the most recent annual notice.

J. Local Travel - Travel occurring within Union County or any adjacent counties, including Mecklenburg, Cabarrus, Stanly, Anson (NC), and Lancaster and Chesterfield (SC).

K. Official County Business - Authorized business that serves a direct and lawful public purpose and is conducted by a Covered Person on behalf of the County.

L. Out Of State Travel - Travel beginning when a person leaves the State of North Carolina and continuing until the person returns to North Carolina.
Exception: Travel to Lancaster or Chesterfield Counties, South Carolina, is not considered Out-of-State Travel under this Policy.

M. International Travel - Travel that involves leaving the United States and its territories. All International Travel must be approved in advance by the Department Director and the County Manager, and may require additional documentation, such as justification of public purpose, travel insurance, and compliance with federal travel advisories.

N. Policy - This Union County Travel Policy.

O. Travel Away from Home - Travel that meets both of the following conditions:
Requires the Covered Person to be away from Union County for more than twelve (12) hours and necessitates overnight rest or sleep to meet the demands of Official County Business.

P. Travel Reimbursement Form - Form designated by Union County's Finance Department that a Covered Person must submit to request reimbursement for travel-related expenses.

IV. Covered Person Responsibilities

Covered Persons shall exercise the same care incurring expenses that a prudent person would exercise if traveling on personal business and expending personal funds. This standard applies equally to domestic and international travel. Covered Persons are expected to utilize services and accommodations appropriate for conducting Official County Business and to travel in reasonable comfort while exercising good judgment in distinguishing between comfort and extravagance.

The County will not pay or reimburse costs resulting from circuitous routes, luxury accommodations, or services unnecessary or unjustified in such travel. By way of illustration and not limitation, the County will not pay for or reimburse the cost for in-room movies and room service meals. Covered Persons will be responsible for any travel costs and expenses incurred for personal

preference or convenience. Any travel expenses for family or guests of a Covered Person are not eligible for reimbursement by the County.

All travel, whether for continuing education, conferences, training, or some other Official County Business – including International Travel, is dependent upon the availability of budgeted funds. Such budgeted funds should be approved in advance as part of the annual budget for the applicable Department. The Director is ultimately responsible for communicating County policies to Covered Persons within such Director's Department.

V. General Provisions

A. Registration Fees – Advance payment of registration fees for educational opportunities, conferences, seminars, training, or other courses requires approval by the Director. Covered Persons shall use a procurement card for payment of registration fees when this payment option is available. When not available, Covered Persons shall request payment by check in advance of payment deadlines in order to provide the Finance Department with sufficient time to process payment.

B. Use of County Vehicles – Covered Persons are encouraged to drive County vehicles when available and when the Covered Person is authorized to drive a County vehicle. A Covered Person should contact the County Garage for vehicle availability. Gas cards are provided for these vehicles, and a Covered Person should use an authorized station for fueling when possible. Directors may use their own personal vehicle at the discretion of the County Manager. Any other Covered Persons may use their own personal vehicle at the discretion of the Director.

C. Parking Fees – The County will pay or reimburse reasonable parking or garage fees for all travel conducted on Official County Business.

D. Travel Advance Payments – Except for the payment of registration fees pursuant to Section V(A), travel advances will require approval by the Director of Finance. If an extenuating circumstance exists, the Director of Finance may at his/her discretion approve a travel advance on a case-by-case basis. Covered Persons requesting a travel advance will provide notice to the Finance Department not later than ten (10) business days prior to the commencement of travel in order for the Finance Department to have sufficient time to prepare the check. If a travel advance is approved, proper documentation of the expenses upon which the travel advance was used will be submitted in accordance with the procedures described in Section VIII of this Policy. Any portion of a travel advance not used by the Covered Person shall be returned to the County's Finance Department. The documentation, along with any portion of the travel advance which was unused, must be submitted to the Finance Department within ten (10) business days upon completion of travel. Failure to submit the required documentation and/or unused portion of the travel advance within the required timeframe will result in a payroll deduction from the employee's

pay in the amount of the travel advance. By accepting a travel advance payment, the employee consents to such withdrawal in accordance with these conditions.

E. Local Travel – Covered Persons who receive a monthly travel allowance are not eligible for reimbursement for transportation expenses when engaged in Local Travel. The County will not pay or reimburse lodging expenses relative to Local Travel unless prior written approval has been given by the County Manager.

F. Approval for Travel Away From Home and Out Of State Travel - All Travel Away From Home requires prior approval by the Director. All Out Of State Travel (unless constituting Day Travel) requires prior written approval by the County Manager. This provision does not apply to county commissioners, the Sheriff, or Register of Deeds.

G. Business Meals- If a Director deems it necessary for County staff and/or officials to have a Business Meal outside of the workplace (which may include other government officials, business community members, prospective employees, or other appropriate persons), the County will pay for or reimburse reasonable meal expenses. Such meals should be purchased using a procurement card, when possible. As justification for such use of the procurement card and in order to receive reimbursement for a Business Meal when use of the procurement card is not possible, the Covered Person shall submit a meal receipt along with an agenda or a statement of purpose of the Business Meal. The agenda or statement of purpose shall contain a list of all attendees at the Business Meal.

When a Director deems it necessary for County employees to work during normal meal breaks, (e.g. lunch hour), and meals or refreshments are provided during such a meeting, the County will pay for such meal as a Business Meal. In such instance, the Director shall use a procurement card and shall submit to the Finance Department the meal receipt, an agenda or statement of purpose of the meal, and a list of all attendees.

H. Expenses Incurred by Agents – The County will pay or reimburse travel expenses incurred by Agents only upon approval by the Director affiliated with the Agent. If there is no Director affiliated with the Agent, the travel expenses incurred by the Agent must be approved by the County Manager; provided, however, that travel expenses incurred by county commissioners do not require approval by a Director or the County Manager. Instead, county commissioners must submit travel expenses in accordance with Section VIII and otherwise comply in full with the requirements of this Policy. The County Manager will review the Travel Reimbursement Forms submitted by county commissioners for compliance with this Policy prior to payment or reimbursement by the County's Finance Department.

I. Cancellations - Penalties and charges resulting from the cancellation of, or change to, scheduled travel is the County's obligation if the Covered Person's travel was approved in advance and the cancellation or change is made at the direction of, and for the convenience of, the County. If the cancellation or change is made for the personal benefit

of the Covered Person, it is the Covered Person's obligation to pay the penalties and charges, unless resulting from serious illness or death to the Covered Person or to a person in the Covered Person's immediate family, or from other critical circumstances beyond the control of the Covered Person.

J. Alcoholic Beverages - The County will not pay for or reimburse expenses related to the purchase of alcoholic beverages under any circumstances. Covered Persons shall not provide alcoholic beverages at County sponsored meals for boards, committees, commissions, or other functions. Any Covered Person who incurs alcohol-related expenses shall be solely responsible for those expenses.

K. International Travel

International travel must comply with all applicable provisions of this Policy and the following additional requirements:

Pre-Approval:

All international travel must receive prior written approval from the County Manager, in addition to any departmental approvals required under this Policy. Approval requests must be submitted with justification demonstrating that the travel is necessary for Official County Business and cost-effective.

Travel Documentation and Compliance:

Covered Persons are responsible for securing all necessary travel documents including passports, visas, work permits (if applicable), and required vaccinations or immunizations. Documentation expenses may be reimbursable if pre-approved.

Flight Arrangements:

Airfare for international travel must be booked at the lowest available economy class rate. Business class airfare will not be reimbursed unless prior written justification and approval are provided, such as for extended travel durations, medical accommodation, or unique business needs.

Currency and Transaction Fees:

Reasonable foreign currency exchange and international transaction fees will be reimbursed with proper itemized receipts.

Lodging and Meals:

When traveling internationally, Covered Persons should utilize government-negotiated or conference hotel rates whenever possible. Meal and incidental expense (M&IE) reimbursements for international locations will follow the U.S. Department of State Foreign Per Diem Rates, rather than GSA rates. These rates can be found at: https://aoprals.state.gov/web920/per_diem.asp.

Procurement Card Usage:

Procurement cards should be used when possible, for international expenses. Covered Persons are advised to notify their card provider before departure to ensure uninterrupted access. International exchange fees should be expected when using the procurement card for international expenses.

Safety and Travel Advisories:

Covered Persons are expected to consult the U.S. Department of State's travel advisories (<https://travel.state.gov>) and follow any County policies regarding safety in high-risk or restricted areas.

VI. Payment or Reimbursement for Day Travel

A. Transportation Expenses – The County will reimburse Covered Persons for use of their personal vehicle for non-Local Travel at the IRS Rate. The County will reimburse Covered Persons for use of their personal vehicle for Local Travel at the IRS Rate, provided that such Covered Persons do not receive a monthly travel allowance. The mileage reimbursed will be measured from the Covered Person's beginning location or the location where the Covered Person typically reports to work, whichever results in a lesser distance.

B. Meals – The County will pay for meals taken during Day Travel when (i) a Covered Person's travel reasonably occurs during regular meal hours, and (ii) such meal otherwise constitutes a Business Meal. In such instances, the Covered Person shall use a procurement card and shall submit to the Finance Department the actual meal receipt(s).

VII. Payment or Reimbursement for Travel Away From Home

A. Transportation Expenses – The County will reimburse Covered Persons for use of their personal vehicle for non-Local Travel at the IRS Rate. The County will reimburse Covered Persons for use of their personal vehicle for Local Travel at the IRS Rate, provided that such Covered Persons do not receive a monthly travel allowance. The mileage reimbursed will be measured from the Covered Person's beginning location or the location where the Covered Person typically reports to work, whichever results in a lesser distance.

The County will pay for or reimburse the cost of fare for bus, train, taxi, and air transportation. Covered Persons must obtain such tickets at the most economical rate available, and they shall make reservations as far in advance as possible to obtain the lowest rates available. If a commercial airline is used, the County will only pay the cost of the airfare and one checked bag (if such a checked bag charge is applicable). Only standard coach/economy class airfares are authorized. Use of a procurement card for payment of such transportation expenses is required when this payment option is available. A detailed receipt along with an agenda or a statement of purpose must be included as part of the procurement card payment.

B. Lodging– The County will pay the actual cost of a commercial lodging establishment. Covered Persons shall utilize conference/seminar hotel packages when available. In the event a conference/seminar package is not available, the Covered Person shall obtain lodging at a reasonable price within a reasonable distance from the conference/seminar or place where the Covered Person is required to conduct Official County Business. Covered Persons shall request a government rate when making reservations if conference/seminar packages are not available. A Covered Person shall use a procurement card to make reservations at a commercial lodging establishment. A detailed original receipt is required indicating the dates of stay, the daily room rate, and all applicable taxes, along with an agenda or a statement of purpose. Credit card receipts are not sufficient.

Job related telephone calls are reimbursable as long as they are shown on the hotel bill. Personal telephone calls will not be reimbursed nor paid for with a County procurement card. When more than one Covered Person occupies the same hotel room, the total lodging expense should be reported on only one of the Covered Person’s Travel Reimbursement Forms (if such expenses are not paid by procurement card). When another person who is not a Covered Person occupies the same hotel room with a Covered Person during authorized travel, the Covered Person must pay the difference between the single and double room rates, if applicable.

C. Meals and Incidental Expenses (M&IE) for Travel Away From Home –

Effective with the implementation of this Policy, Covered Persons who undertake Travel Away From Home will no longer be allowed to purchase meals or incur Incidental Travel Expenses using a procurement card, nor will they be reimbursed based upon receipts for such expenses. Rather, Covered Persons will receive a daily M&IE allowance for meals and Incidental Travel Expenses for each day of travel as provided for in this Section. The daily M&IE allowance shall be requested on the Covered Person’s Travel Reimbursement Form and submitted in accordance with Section VIII of this Policy.

A daily M&IE allowance will be provided using the most current version of the *Maximum Federal Per Diem Rates* for meals and incidental expenses as published by the U.S. General Services Administration (“GSA”). These rates are currently available at the GSA’s website: <http://www.gsa.gov>.

For international travel, the M&IE allowance will be calculated using the U.S. Department of State Foreign Per Diem Rates for meals and incidental expenses. These rates vary by country and city, and include amounts for lodging, meals, and incidental expenses. Covered Persons should consult the most current rate applicable to their destination. Adjustments for meals provided by a conference, host agency, or airline must still be deducted using the State Department’s deduction guidance. These rates can be found at: https://aoprals.state.gov/web920/per_diem.asp.

A Covered Person shall take the following steps to calculate the amount of the M&IE allowance for each day of travel (please also refer to subsection D of this Section for a sample calculation). This calculation must be done separately for each day of travel.

Step 1

Determine which column of the daily M&IE allowance chart (shown below as an example only, subject to change) corresponds with the M&IE allowance amount (shown as the M&IE total) applicable to the Covered Person's area of travel. The Covered Person's area of travel is based upon the work/conference/seminar location, not the accommodation location.

The column which corresponds with the Covered Person's area of travel is determined by the federal government based upon average costs in that area. By way of example only, if a Covered Person's area of travel is Raleigh, the current applicable M&IE column is the \$74 column; whereas if a Covered Person's area of travel is Asheville, the current applicable M&IE column is the \$80 column. The applicable M&IE allowance column amounts which correspond with areas of travel are currently available on the GSA's website at: <http://www.gsa.gov>.

Once the appropriate column is determined, the Covered Person should only utilize that column in their calculations of each day's M&IE allowance amount for that particular area of travel.

Step 2

Determine whether the M&IE allowance amount for that day is based upon the full M&IE allowance amount in the top row of the column, or if the M&IE allowance amount for that day is based upon the partial M&IE allowance amount shown in the bottom row of the column.

On the first day of travel, the last day of travel, or partial travel days (those Travel Away From Home trips that last longer than 12 hours, but less than 24 hours), the Covered Person should use the partial M&IE allowance amount shown in the bottom row of the column in calculating the M&IE allowance amount for that day.

Otherwise, on full days of travel, the Covered Person should use the full M&IE allowance amount shown in the top row of the column in calculating the M&IE allowance amount for that day.

Step 3

Determine if any deductions should be made from the M&IE allowance amount determined in Step 2.

If there are no meals furnished to the Covered Person at the conference/course/meeting on that day (e.g. meals included as part of the registration fees already paid by the County or

vendor/association sponsored meals), then there are no required deductions. The Covered Person will receive the M&IE allowance amount determined in Step 2.

However, if there are meals furnished to the Covered Person at the conference/course/meeting on that day (as described in the paragraph above), a Covered Person shall deduct the appropriate amount from the amount determined in Step 2 based upon the type of meal(s) provided (This applies for all Travel Away From Home within the Continental United States). This deduction must be made for each such meal. The amount remaining after such meal deductions from the Step 2 amount is the M&IE allowance applicable for that day. However, the total amount of deductions made shall never cause a Covered Person to receive less than the amount allowed for incidentals in the chart below.

M&IE total	Breakfast	Lunch	Dinner	Incidental expenses	First and last day of travel
\$68	\$16	\$19	\$28	\$5	\$51.00
\$74	\$18	\$20	\$31	\$5	\$55.50
\$80	\$20	\$22	\$33	\$5	\$60.00
\$86	\$22	\$23	\$36	\$5	\$64.50
\$92	\$23	\$26	\$38	\$5	\$69.00

Exception for Union County Sheriff's Office

This paragraph only applies to Covered Persons associated with the Union County Sheriff's Office. Other than as set forth in this paragraph, Sections VII(C)-(D) of this Policy do not apply to Covered Persons associated with the Union County Sheriff's Office during Travel Away From Home.

Such Covered Persons will not receive a daily M&IE allowance for meals and incidental travel expenses. Instead, these individuals shall comply with the following guidelines:

Meal Expenses:

Covered Persons shall either:

- a) use a procurement card for meal costs incurred during Travel Away From Home, or
- b) use personal funds and submit a Travel Reimbursement Request for actual meal costs.

All reimbursement requests must include:

Itemized meal receipts, and an agenda or statement of purpose for the meal to substantiate the expense.

Meal reimbursement or procurement card payments shall not exceed the applicable per-meal deduction amounts based on GSA's current Maximum Federal Per Diem Rates for the area of travel, as outlined in Step 1 of this Section.

For example, if the M&IE total for the area is \$68 per day, the County shall pay or reimburse up to: \$16 for breakfast, \$19 for lunch and \$28 for dinner.

Incidental Travel Expenses:

Covered Persons may submit a Travel Reimbursement Request for actual incidental expenses incurred each day, up to the daily incidental expense limit specified in the GSA's current Maximum Federal Per Diem Rates for the relevant area of travel.

Example: If the incidental expense portion is \$5 per day (as shown in the sample chart below), reimbursement will be limited to \$5 per day.

D. Sample M&IE Allowance Calculation

Use of the GSA formula for calculation of the M&IE allowance is best illustrated by example. Note that this example does not consider any transportation or lodging expenses.

A Covered Person leaves Union County on Monday morning for a conference in Asheville. The conference takes place on Monday afternoon, all day Tuesday and Wednesday, and Thursday morning. The Covered Person returns to Union County on Thursday afternoon. On Tuesday the conference (which was paid for by the County) provides lunch and dinner. On Wednesday, the conference provides lunch only. On Thursday, the conference provides breakfast only. Because provided as part of the conference, these meals have in effect already been paid for by the County.

The applicable M&IE allowance total for the travel area (Asheville) is the \$80 column. The M&IE allowance for each day will be calculated as follows based upon the applicable \$80 M&IE allowance column:

Monday- \$60 = [first day of travel allowance amount (\$60) with no provided meal deductions]

Tuesday- \$25 = [full day M&IE allowance amount (\$80) with a \$22 deduction for the provided lunch and a \$33 deduction for the provided dinner]

Wednesday- \$58 = [full day M&IE allowance amount (\$80) with a \$22 deduction for the provided lunch]

Thursday- \$40 = [last day of travel allowance amount (\$60) with a \$20 deduction for the provided breakfast).

VIII. Travel Reimbursement Procedures

A. Submitting a Travel Reimbursement Request – A Covered Person must complete a Travel Reimbursement Form and attach original itemized receipts (excluding meals and incidental expenses if requesting the M&IE allowance) for expenses to be reimbursed. All appropriate areas of the reimbursement form must be completed. The form includes the date of departure and arrival at the official workplace and/or any other place travel begins or ends. Departure and arrival times must be included if a M&IE allowance is requested. If any portion is left blank, the Travel Reimbursement Form will be returned to the Covered Person submitting the form.

The Covered Person must also submit a copy of the conference program, agenda and/or a statement of purpose for travel indicating the days and times of the conference/seminar/course/purpose of business, along with the Travel Reimbursement Form. If the travel period is greater than the length of the conference/seminar/course/purpose of business, the Covered Person must submit documentation indicating that there is a savings to the County by staying additional days and/or nights. Documentation includes, by way of illustration only, quotes from a ticket agent on such items as airfare, quotes on accommodation rates, etc.

For international travel, Covered Persons must also submit:

- A copy of the international flight itinerary.
- All required documentation receipts in English or accompanied by a translated summary.
- The applicable U.S. Department of State per diem schedule for the travel destination.

B. Approval and Processing of Reimbursement Requests – The Covered Person must submit the Travel Reimbursement Form and all supporting documentation to their Director, or the County Manager, as applicable, for approval within thirty (30) days of completion of the travel. After signed approval, the Travel Reimbursement Form and all accompanying documentation is forwarded to the County’s Finance Department. A Travel Reimbursement Form submitted by a county commissioner is reviewed by the County Manager for the sole purpose of determining compliance with this Policy before being forwarded to the County’s Finance Department.

The Finance Department will audit the Travel Reimbursement Form. This includes validating the required signed authorized approval, verifying mathematical calculations, verifying

travel receipts submitted, and confirming that M&IE allowances requested are in compliance with this Policy. If an error is discovered in the Travel Reimbursement Form or accompanying documentation, the reimbursement amount will be adjusted accordingly, and the Finance Department will notify the submitting Covered Person and the approving Director (or County Manager) prior to payment.

IX. Penalties Associated with Violation of this Policy or Abuse of Travel Reimbursement

A. Union County Personnel Resolution – An intentional violation of this Policy constitutes unacceptable personal conduct under the Union County Personnel Resolution. Such an intentional violation of this Policy by a County employee may result in disciplinary action up to and including dismissal from County employment.

Employees who abuse travel privileges shall be subject to disciplinary action, up to and including dismissal from County employment, as deemed appropriate by the County Manager. Abuse of travel privileges includes, but is not limited to, the following:

- Falsification of travel documentation or requests for reimbursement.
- Submission of requests for travel expenses not determined to be related to the purpose of travel.
- Use of County vehicles for transportation not related to the purpose of travel.

B. State Statute Penalties – A Covered Person submitting or approving falsified reimbursement forms is subject to disciplinary action and/or criminal prosecution. It is provided in G.S. § 159-181(a) that any governing board member, officer, or employee of a local government submitting a written claim or approving a claim for funds, knowing that any portion of such claim is false, is guilty of a Class 3 misdemeanor.

Any employee who receives reimbursement or has expenses paid by any other source including vendors, federal, state, or local grants, or any private contributor may not claim those same expenses for reimbursement from the County. A claim submitted for such expenses is in violation of G.S. § 159-181(a) as noted above.

X. Variances

It is understood that this Policy may not anticipate every conceivable circumstance pursuant to which payment or reimbursement of travel expenses by the County may be reasonable. Therefore, approval of a variance may be granted by the County Manager if it is concluded that strict enforcement of this Policy would result in severe practical difficulties or unnecessary hardships for the Covered Person and that by granting the variance the spirit of the Policy will be observed and substantial justice done.

XI. Effective Date

This Policy shall become effective for travel beginning on or after October 7, 2025, and it shall supersede the Union County Travel Policy in effect for travel occurring prior to such time.

Adopted by the Union County Board of Commissioners this the 17th day of February, 2014.

Revised August 14, 2023, April 7, 2014, and October 6, 2025.



Union County, NC

Staff Report

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

File #: 25-606

Agenda Date: 10/6/2025

TITLE:

Contract - Janitorial Services

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Facilities and Fleet Management completed an assessment of our Janitorial Services Contract in FY2025 and concluded that a two-contract structure would potentially pose a lower risk to the County given the current state of the janitorial market. A common issue that contractors face in the market is finding, hiring and retaining quality staff. That issue has contributed to lower quality of work and inconsistent service delivery.

This request is to approve the second of two janitorial contracts that will service all general government and UC Water facilities. The Board previously approved the first of the two contracts at the May 19, 2025, meeting and the contract went into effect on July 1, 2025. This contract will include custodial services for approximately 66% of the county's general government and UC Water facilities and will go into effect on November 1, 2025.

The breakdown of the buildings serviced by each of the two custodial contracts is below:

Contract #1 previously awarded by Board on May 19, 2025, to Citywide:

Buildings serviced include Jefferson Street (leased), Agriculture Center, Emergency Services, Simpson Event Center, Judicial Center, UCSO Animal Shelter, UCSO Firing Range, UCSO Administration Building, and Old UCSO Administration Building.

Contract #2 (REQUESTED TO BE APPROVED IN THIS AGENDA ITEM) - Recommendation to award to Integrity:

Buildings to be serviced include Adult Probation (leased), Farmers Market, Government Center,

Historic Courthouse, Historic Post Office, Human Services, Juvenile Probation (leased), Main Library/Board of Elections, Marshville Library, Patton Ave, Progress Building, Southwest Regional Library, UCPS Administration, Union West Library, 12 Mile Creek, Crooked Creek, Public Works Operations Center, and Yadkin Water Plant.

The Procurement Department partnered with Facilities & Fleet Management to issue Request for Proposals RFP#2025-056 Janitorial Services. On July 1, 2025, twenty-six proposals were received and reviewed by an evaluation team in accordance with applicable evaluation criteria for this project. The top ranked three firms/vendors were invited to shortlist interview/presentations. As a result, the team requests approval to enter into a contract with the top scoring/ranked preferred offeror, Integrity National Corporation, to provide janitorial services.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$1,100,558. Since this contract contains an initial term of two years with three one-year renewal options, a total of \$5,502,790 is estimated to be spent. Funding is available in the adopted FY26 budget with future expenditures subject to annual BOCC budget appropriation.

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 INTEGRITY NATIONAL CORPORATION, a Maryland corporation authorized to do business in North Carolina, whose address is 1734 Elton Road, Suite 230, Silver Spring, MD 20903, hereinafter “Contractor.”

W I T N E S S E T H

WHEREAS, Union desires that Contractor perform certain janitorial 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 Proposal No. 2025-056, “Janitorial Services,” including Addendum No. 1 thereto dated June 24, 2025, and Addendum No. 2 thereto dated July 7, 2025 (the “RFP”), which is incorporated herein by reference (hereinafter the “Services”), in accordance with the terms of this Agreement. Union may make additional changes to the Services during the term of this Agreement. Union may remove any facility from the Services upon ten (10) days’ written notice to Contractor. Upon the effective date of such removal, Contractor shall cease providing Services at the removed facility and shall not invoice Union for such facility thereafter. If services are to be added, including, but not limited to, services at a new facility, the parties shall negotiate the scope and fees in good faith. No change requiring an increase in fee or a material modification to the Services shall be effective without written amendment hereto.

2. FEE AND PAYMENT SCHEDULE. Union shall pay Contractor in accordance with the pricing listed on the attached Pricing Proposal Form for performance of the Services. The Pricing Proposal Form is incorporated herein by reference. 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 Department. 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 November 1, 2025. This Agreement shall have a term of two (2) years (the “Initial Term”). Upon completion of the Initial Term, Union may, in its sole discretion, elect to renew this Agreement for up to three (3) additional one (1)-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. FACILITY FLOOR PLANS. If Contractor requires the use of floor plans showing detailed layouts of Union's facilities, Union may provide such floor plans to Contractor. Notwithstanding Section 5 herein or anything else in the Agreement to the contrary, Contractor shall keep all floor plans in the strictest confidence and shall only allow such employees or agents of Contractor who need to review the floor plans in order to carry out the Services to see the floor plans. Upon termination of this Agreement, Contractor shall return all floor plans to Union or shall destroy all copies of the floor plans.

5. 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.

6. INSURANCE. The attached Exhibit A, Insurance Requirements, is incorporated herein by reference.

7. 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.

8. DISPUTE RESOLUTION.

A. Any claim, dispute, or other matter in question arising out of or related to this Agreement shall be subject to mediation as a condition precedent to the institution of legal or equitable proceedings by either party. Union and Contractor shall endeavor to resolve claims, disputes, and other matters in question between them by mediation which, unless the parties mutually agree otherwise, shall be in accordance with the Rules Implementing Statewide Mediated Settlement Conferences in Superior Court Civil Actions promulgated pursuant to N.C. Gen. Stat. § 7A-38.1, or any successive statutory alternative dispute resolution rules or requirements. A request for mediation shall be filed in writing with the other party to this Agreement. The mediator must be certified by, and in good standing with, the North Carolina Dispute Resolution Commission. The parties agree to split the mediator's fee and any filing fees equally and to pay such fees promptly on demand. The mediation shall be held in Union County, North Carolina, unless the parties and mediator mutually agree on another location. The parties agree that if there is no resolution of a dispute satisfactory to both parties pursuant to the mediation procedure outlined in this Section within sixty (60) days after the request for mediation is filed with the other party, the next step in the dispute resolution process, and the binding method of dispute resolution, shall be litigation in the General Courts of Justice in the State of North Carolina sitting in Union County, North Carolina.

B. During resolution of any dispute pursuant to this Section 8, Contractor and Union shall each continue to perform all of their respective obligations under this Agreement without interruption or delay.

9. FORCE MAJEURE. Neither party shall be liable to the other for any loss, damage, failure, delay, or breach in rendering any services or performing any obligations hereunder to the extent that such failure, delay or breach results from any cause or event beyond the control of the party being released hereby (“Force Majeure”), including but not limited to acts of God, acts or omissions of civil or military authorities (acting in their sovereign, but not in their contractual, capacity), floods, torrential rainfall, other severe or unusual weather or climatic conditions, which would exist for a substantial period of time and would have an effect so as to substantially impair the completion deadline, epidemics, quarantines, or other medical restrictions or emergencies, defects or failures in equipment or materials owned or supplied by the other party, strikes or other labor actions, embargoes, wars, civil disobedience, riots, terrorism, or of governmental rationing or fuel and/or power which would result in a severe shortage thereof, which would substantially impair the proposed completion deadline.

If either party is prevented or delayed in the performance of its obligations hereunder by Force Majeure, that party shall immediately notify the other party in writing of the reason for the delay or failure to perform, describing in as much detail as possible the event of Force Majeure causing the delay or failure and discussing the likely duration of the Force Majeure and any known prospects for overcoming or ameliorating it. Both parties agree to take any commercially reasonable measures to overcome or ameliorate the Force Majeure and its adverse effects on this Agreement, and to resume performance as completely as is reasonably possible once the Force Majeure is overcome or ameliorated.

10. 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.

11. 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.

12. 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.

13. 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.

14. 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.

15. 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.

16. 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.

17. 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.

18. NON-COMPETE AGREEMENTS. In consideration of the execution of this Agreement by Union, Contractor will not enter into covenants not to compete or non-competition clauses with its employees staffed on Union's account which would prohibit said employees from competing, directly or indirectly, or competing in any other manner, with Contractor. Additionally, Contractor will execute legally binding releases with any of Contractor's employees staffed on Union's account as of the Effective Date, as well as any additional employees staffed to Union's account during the term of this Agreement. Such releases will terminate any covenants not to compete or non-competition clauses with Contractor's employees staffed on Union's account, which covenants or clauses would prohibit said employees from competing, directly or indirectly, or competing in any manner, with the Contractor, as such covenants or clauses apply to Union. Contractor shall also not enforce any covenants not to compete or non-competition clauses against any former employees if such employee is hired or contracted with, directly or indirectly, by Union. For purposes of this Section, the phrase "competing directly or indirectly, or competing in any other manner, with Contractor," shall mean the entering into or attempting to enter into any similar business as that carried on by this Agreement with any individual, partnership, corporation, subdivision of the State of North Carolina, or association that was or is the same or related business as the Contractor. This Section shall survive termination or expiration of the term of this Agreement.

19. 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.

20. 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.

21. 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.

22. 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.

23. 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.

24. 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.

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

INTEGRITY NATIONAL CORPORATION

By: _____ (SEAL)

Approved as to Legal Form RLM

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. 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. FIDELITY COVERAGE

Fidelity coverage providing (1) Employee Theft; (2) Forgery or Alteration; (3) Theft, Disappearance or Destruction; and (4) Computer and Funds Transfer Fraud coverage covering contractors, employees, officials and agents for Contractor with limits of no less than \$100,000 – claims made. This requirement may be met with a Fidelity Bond of Commercial Crime Insurance when the Commercial Crime Insurance policy includes Union County under third party coverage.

E. LOST KEY COVERAGE

Lost Key coverage to cover the expense of having the facilities covered herein totally re-keyed or re-keyed as necessary for lost or misplaced master or other keys for which Contractor is responsible. Minimum coverage required of \$5,000 each occurrence.

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: Facilities
Contract #: 9891

- 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.

SECTION II. PRICING PROPOSAL FORM

UNION COUNTY GENERAL GOVERNMENT FACILITIES

Facility	Vendor Calculated Net Cleanable Square Footage	Day Porter Services	Standard Janitorial Services	Annual Total
a) Adult Probation	9,000	NA	\$14,620.92	\$14,620.92
b) Farmers Market	4,200	NA	\$6,823.09	\$6,823.09
c) Government Center	131,360	\$91,396.62	\$213,400.41	\$304,797.03
d) Historic Courthouse	13,890	\$9,664.27	\$22,564.95	\$32,229.22
e) Historic Post Office	24,250	NA	\$39,395.25	\$39,395.25
f) Human Services	131,092	\$91,210.15	\$212,965.03	\$304,175.19
g) Juvenile Probation	9,020	NA	\$14,653.41	\$14,653.41
h) Lois Morgan Edwards Memorial Library	8,438	\$5,870.92	\$13,707.92	\$19,578.85
i) Main Library/Board of Elections	39,776	\$27,675.03	\$64,617.96	\$92,292.99
j) Progress Building	9,500	NA	\$15,433.19	\$15,433.19
k) Southwest Regional Library	17,200	\$11,967.28	\$27,942.20	\$39,909.48
l) Union West Library	11,378	\$7,916.49	\$18,484.09	\$26,400.58
m) UCPS Administration	21,500	\$14,959.10	\$34,927.75	\$49,886.85
n) <u>Patton Ave Complex:</u> Fleet Building County Garage Radio Shop Tire Shop	11,429	NA	\$18,566.94	\$18,566.94
Grand Totals:		\$260,659.88	\$718,103.11	\$978,762.99

UNION COUNTY WATER FACILITIES

Facility	Vendor Calculated Net Cleanable Square Footage	Day Porter Services	Standard Janitorial Services	Annual Total
a) <u>UC Water Operations Center:</u> Administration Building Warehouse Building (Office Space) Shops (Restrooms) Equipment Building (Restrooms)	11,172	NA	\$18,149.43	\$18,149.43
b) 12 Mile WRF	3,388	NA	\$5,503.96	\$5,503.96
c) Crooked Creek WRF	950	NA	\$1,543.32	\$1,543.32
d) Raw Water Intake	1,018	NA	\$1,653.79	\$1,653.79
e) Yadkin Water Treatment Plant	6,728	NA	\$10,929.95	\$10,929.95
Grand Totals:			\$37,780.45	\$37,780.45

Note: Reference Section 4.3 for services required at each building. Indicate N/A if the service is not required.

SECTION IV. DRIVER/GENERAL LABORER FORM

Services	Total Annual Rate
Driver/General Laborer	\$84,014.58

JOB DESCRIPTION: This position will require the Contractor to provide a minimum 14 foot box truck with lift gate. The duties of a driver/general laborer include but are not limited to the following:

1. **Surplus:** move surplus items to and from various facilities
2. **Recycling:** pick up and empty recycling at all Union County properties three times a week.
3. **Shredding:** pick up and move boxes to shredding cage and then assist shredding vendor to dispose of material in boxes.
4. **General Upkeep:** Deodorize drains. Hose off boot scrapers. Remove grates and vacuum out tray of entrance mats. Check ash urns and refill sand as needed. Run water in the sinks of all janitorial closets. Clean ledges over front entrance and high windows in the Main Library. Empty trash in the Garage building at Patton Avenue complex.
5. **Set-Up & Move Furniture:** move and set-up furniture as requested.
6. **Police Grounds:** Paper, bottles, cans, and all other trash and refuse shall be removed from all stairwells, parking lots, and exterior court areas of the buildings. All removed items shall be deposited in the nearest waste/recycling container. Blow leaves and debris from vending area at the Government Center. Blow leaves off steps in the plaza near the outside vending machines of the Government Center every morning.
7. **Event Set-Up:** pick up tables, chairs, podium, or sound equipment as requested and arrange as needed.
8. **Other tasks as assigned.**

SECTION V. HOURLY SERVICES & CONTRACT FLOOR WORK FORM

Contract Floor Work	Per Square Foot	Minimum Charge
1. Strip and Wax Floors	\$0.50	\$500.00
2. Carpet Extraction	\$0.20	\$500.00
3. Carpet Cleaning	\$0.20	\$500.00
4. Tile & Grout Cleaning	\$0.30	\$500.00
Hourly Services	Regular Time	Overtime
Custodial Day Porter (hourly rate)	\$28.94	\$41.30
Custodian	\$27.39	\$38.98
Custodial Floor Specialist	\$28.16	\$40.14
Custodial Manager	\$48.79	\$71.09
Disinfecting Services	\$27.39	\$38.98



Request for Proposals No. 2025-056 Janitorial Services

Due Date: July 1, 2025
Time: 11:00 AM EST
Receipt Location: Electronic Submittals
Union County Government Center
Procurement Department
500 N. Main Street, Suite 709
Monroe, NC 28112

Non-Mandatory Pre-Proposal Conference and Site Visit. June 10, 2025. For the time and location, Refer to page 6 for details.

Procurement Contact:

Corey Brooks, CLGPO
Senior Procurement Specialist
704.283.3683
Corey.Brooks@unioncountync.gov

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1 NOTICE OF ADVERTISEMENT

Union County, North Carolina Request for Proposals No. 2025-056 Janitorial Services

Electronic proposals will be received by the Union County's Procurement & Contract Management Department at the Union County Government Center, 500 North Main Street, Monroe, NC 28112 until **11:00 AM EST on July 1, 2025**. Late submittals will not be accepted.

Union County, North Carolina, through its Facilities & Fleet Management Department is soliciting proposals from experienced and qualified companies to provide janitorial services.

Non-Mandatory Pre-Bid and Site Visit Meeting: This is a non-mandatory meeting that will take place on **June 10, 2025, at 9:00am** at the Union County Government Center, 500 N. Main Street Monroe, NC 28112.

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/government/departments-f-p/procurement-contract-management/current-bids>
2. Download the Solicitation Documents from the State of North Carolina Electronic Vendor Portal: <https://evp.nc.gov> (Bid by Departments, search County of Union).

All questions about the meaning or intent of the RFP Documents are to be submitted in writing to the Procurement Representative listed on the cover page (corey.brooks@unioncountync.gov) no later than **June 17, 2025 at 5:00 PM EDT**.

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's Procurement & Contract Management Department no later than **11:00 AM EST on July 1, 2025**, 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://portal.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.

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 PROPOSAL QUESTIONS

Proposal questions will be due on or before **June 17, 2025, at 5:00 PM EDT**. The primary purpose is to provide participating Offerors with the opportunity to ask questions, in writing, related to the RFP.

Submit questions by email to Corey Brooks at Corey.Brooks@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>

2.4 PRE-PROPOSAL CONFERENCE AND SITE VISITS

The Non-Mandatory Pre-Proposal Conference will take place at the Union County Government Center, 500 N. Main Street, Monroe, NC at the front entrance of the building. (first site visit location).

The site visit schedule is listed below. Attendance is strongly encouraged.

Date: June 10, 2025

Pre-Proposal Time: 9:00 AM

Location: Union County Government Center
500 N. Main Street, Monroe, NC 28112

Site visits will be limited to two (2) people per vendor. Schedule is as follows:

UNION COUNTY SITE VISIT SCHEDULE

Tuesday, June 10, 2025

FACILITY	ADDRESS	ARRIVALTIME
Government Center	500 N Main St, Monroe NC 28112	9:00 a.m.
Historic Post Office	407 N Main St, Monroe NC 28112	10:00 a.m.
Historic Courthouse	300 N Main St, Monroe NC 28112	10:20 a.m.
UCPS Administration	400 N Church St, Monroe NC 28110	11:10 a.m.
Main Library/Board of Elections	316 E Windsor St, Monroe NC 28112	11:30 a.m.
Juvenile Probation	604 Lancaster Ave, Monroe NC 28112	11:50 a.m.
Farmers Market	805 Skyway Dr, Monroe NC 28110	10:45 a.m.
Patton Avenue	610A Patton Ave, Monroe NC	12:30 p.m.
Adult Probation	2630F Nelda Drive Monroe NC 28110	1:00 p.m.
Human Services	2330 Concord Ave, Monroe NC 28110	1:30 p.m.
Yadkin WTP	3522 New Salem Road, Monroe, NC	2:00 p.m.
Lois Morgan Edwards Memorial Library	414 Hasty St, Marshville NC 28103	2:30 p.m.

Wednesday, June 11, 2025

FACILITY	ADDRESS	ARRIVALTIME
Progress Building	1407 Airport Rd, Monroe NC 28110	9:00 a.m.
UC Water Operations Center	4600 A Goldmine Rd, Monroe NC 28110	9:30 a.m.
Crooked Creek WRF	4015 Sardis Church Rd., Monroe NC	10:00 a.m.
Union West Library	123 Unionville-Indian Trail Rd, Indian Trail NC	10:30 a.m.
12 Mile Creek WRF	8299 Kensington Dr, Waxhaw NC 28173	11:00 a.m.
Southwest Regional Library	1515 Cuthbertson Rd, Waxhaw, NC	11:30 a.m.
Raw Water Intake	465 Bayshore Drive, Norwood, NC	N/A

2.5 PROPOSAL QUESTIONS

Proposal questions will be due on or before **June 17, 2025, 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 Corey Brooks at corey.brooks@unioncountync.gov by the deadline shown above. Questions sent in graph or Excel sheet format will not be accepted. **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 www.ips.state.nc.us.

2.6 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.

2.7 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.

2.8 DEFINITIONS

As used throughout this RFP, the following terms shall have the meaning set forth below.

- A. Absentee Coverage Plan.** A defined approach to ensure continual coverage of cleaning responsibilities as a result of employee absence or increased work load needs.
- B. Clean.** Clean shall be defined as free of dirt, dust, spots, streaks, stains, smudges, litter, debris and other residue.
- C. Contractor.** The term Contractor as used herein refers to both the prime Contractor and any subcontractors. The prime Contractor shall ensure that his/her subcontractors comply with the provisions of this contract.
- D. Union County Contract Manager.** A supervisor or superintendent (non-production) assigned to provide oversight for the janitorial services.
- E. Day Porter.** Cleaning position assigned to individual facility to provide cleaning duties over a standard eight-hour work day.
- F. Multi-Site Day Porter.** Cleaning position assigned to provide cleaning duties at multiple facilities.
- G. Driver/General Laborer.** Position responsible for completing duties as outlined in Appendix B, Section IV.
- H. Disinfect.** Cleaning or removal of any harmful microorganisms by application of an industrial approved method.
- I. Facility.** An establishment, structure, or assembly of units of equipment designated for a specific function.
- J. Night Crew.** Contracted personnel assigned to provide Standard Janitorial Services after normal business hours.

- K. Normal Business Hours.** The normal working hours are from 8:00 a.m. to 5:00 p.m., Mondays through Fridays except (a) Holidays and (b) other days specifically designated. Library hours may vary.
- L. Quality Assurance (QA).** A method used by the County to provide some measure or control over the quality of purchased goods and services received.
- M. Quality Control (QC).** A method used by the Contractor to control the quality of goods and services produced.
- N. Day Porter Working Hours.** The normal working hours are from 8:00 a.m. to 5:00 p.m., Mondays through Fridays except (a) Holidays and (b) other days specifically designated. Library hours may vary.
- O. Standard Janitorial Services Evening Working Hours.** The evening working hours are between 5:00 pm to midnight, Monday through Fridays except (a) Holidays and (b) other days specifically designated.
- P. Response Time.** Response time is defined as the time allowed the Contractor after initial notification of a work requirement to be physically on the premises at the work site, with appropriate tools, equipment, and materials, ready to perform the work required.
- Q. Space.** A space is an area to receive janitorial services, which may or may not be considered a room by common definition. Examples of spaces are definable sections of hallways, stairwells, lobbies, offices, entrances, elevators, wheelchair ramp lifts, and outdoor walkways.
- R. Standard Janitorial Services.** Services as defined in *Appendix A, Section I*.
- S. Waste Containers.** Waste containers are defined as trash receptacles, wastebaskets, trashcans, wastepaper baskets, ashtrays, recycling boxes or any container holding trash, paper, recyclables or refuse of any type.
- T. FAMIS.** Work order system used to assign work orders. Work orders are to be closed by the supervisor as work is performed.

Equipment and Supplies. All equipment and supplies necessary to perform the work as described herein must be supplied by the contractor.

3 PURPOSE

3.1 COUNTY

Union County (estimated population 245,663) 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. The Facilities Management Division is

responsible for maintaining all County facilities. Contract services are utilized to provide janitorial and day porter services to keep all facilities clean and tidy for general use by both the public and County employees.

3.2 INTRODUCTION

The purpose of these specifications is to define the janitorial and day porter services requirements for various facilities owned and operated by Union County that are included in this contract. The objectives of Facilities & Fleet Management are to secure a timely, consistent, and cost effective janitorial and day porter services contract from one contractor, to ensure clean and safe facilities for employees and customers doing business with the County. The work covered in these specifications includes furnishing all labor, equipment, supplies, and supervision necessary for complete janitorial and day porter service. It shall be understood that in addition to these services, all tasks incidental to cleaning functions not specifically listed but normally included in general janitorial practices will be provided.

4 SCOPE OF WORK AND REQUIREMENTS

4.1 OVERVIEW

The contractor shall provide all labor, supplies, supervision, tools, materials, equipment, and transportation necessary to provide janitorial and day porter services in accordance with the referenced specifications. Janitorial and day porter services applies to all designated spaces including, but not limited to, halls, restrooms, offices, work areas, entrance ways (exterior and interior), lobbies, storage areas, elevators, stairways and walkways.

The Contractor shall adhere to all current applicable federal, state, and local laws, codes and ordinances, including those promulgated by the North Carolina State Department of Health Services.

4.1.1 VERIFICATION OF THE NET CLEANABLE SQUARE FOOTAGE

The contractor is responsible for verifying the net cleanable square footage at each facility. This will form the basis for pricing and should be included in Appendix B, Section II: Pricing Proposal Form.

4.1.2 AREAS UNDER-CONSTRUCTION

When specified areas under this contract are under construction or not being used, deductions to the normal contract amount will automatically be made based on the pricing for locations and areas under construction.

4.1.3 ADDITIONAL FACILITIES AND INCREASES TO SCOPE OF WORK

The County may add or subtract facilities and/or increase the general scope of this contract as necessary. Any modification in pricing will be negotiated in good faith with the Contractor.

4.1.4 CELL PHONE & COMMUNICATION

Day porters and Driver/General Laborer will be expected to have a working cell phone on their person provided by the Contractor and to respond within 5 minutes to calls from Facilities Management staff and other designated Union County staff.

4.1.5 CLEANING PRODUCTS

Chemicals and paper products must be "Green Seal" approved or meet or exceed the "Green Seal" standards.

4.1.6 COUNTY PROPERTY

Contractor's employees shall not use County phones, computers, copiers, fax machines, etc.

4.1.7 ENERGY CONSERVATION

The Contractor shall conserve energy as practical during the performance of janitorial activities.

1. **Air Conditioning/Heating Control.** The air conditioning and heating control settings are not to be altered unless approval is obtained by the County.
2. **Lights.** Only those lights, which are necessary to perform work tasks, will be utilized. Once a task within a given sector has been executed, the lights will be turned off in that sector and work will progress into another area. Lights will be left on in only designated areas.

4.1.8 EMPLOYEE QUALIFICATIONS

All employees must be able to communicate effectively with staff and the public.

Contractor will be required to submit verification that employees have the right to work in the United States. Contractor shall perform all obligations in a good professional and lawful manner, provide competent and sober personnel, efficient and clean equipment, and service the County in courteous, helpful and impartial manner. The Contractor shall remove any of its employees from work on this contract for justifiable cause upon the request of the County.

Contractors shall perform federal, state, and local background checks for every employee assigned to perform duties under this contract in any Union County managed facility.

Contractor will be responsible for reporting all negative results to the Union County Contract Manager for review and approval/disapproval of employee(s) to be assigned duties under this contract.

4.1.9 UNIFORMS AND APPEARANCE

Employee uniforms shall be clean and neat in appearance and include a patch or badge indicating the Company they represent. All personnel assigned by the Contractor to perform work for the County shall be required to wear a uniform bearing the company name and/or logo while conducting work at County facilities. A sample of the proposed uniform will be submitted to Union County for review and approval. Uniforms shall look professional and be presentable, unrestrictive to the body, and free of holes or tears. Sufficient changes of uniforms shall be provided by the Contractor to present a neat and clean appearance of personnel at all times. The County reserves the right to make any final decisions as to the acceptability of appearance of any individual performing work under the awarded contract.

4.1.10 EMPLOYEE THEFT

Contractor will be responsible for theft by their employees. Theft by the employees will not be tolerated and will be prosecuted to the fullest extent of the law.

4.1.11 INTERFERENCE WITH COUNTY BUSINESS

The Contractor shall schedule and arrange work so as to cause the least interference and liability with the normal occurrence of County business. In those cases where some interference may be essentially unavoidable, the Contractor shall be responsible to make every effort to minimize the impact of the interference, inconvenience, customer discomfort, etc.

4.1.12 KEYS & ACCESS CARDS

Each contracted employee is required to have an access card prior to beginning work. The Contractor will supply the required employee information and complete the appropriate forms and submit it to the Union County Facilities Management Department. Keys and access cards to these facilities will be issued to the successful Contractor and employees. Any keys and access cards are and will remain the property of Union County. Duplication of keys is prohibited. Should the Contractor lose any keys or access cards, the Contractor shall pay to have the locks changed, systems rekeyed, or access cards terminated and reimburse Union County for all costs associated with such action.

The successful Contractor is responsible for providing to the Projects/Contracts Coordinator a current list of employees. It is the responsibility of the Contractor to notify the County of changes to the employee listing.

Union County retains the right to have any Contractor's employee removed from the premises for any reason.

4.1.13 PAYROLL & WAGE REPORT

The minimum pay rate for janitorial & porter personnel shall not be less than the federal minimum wage rate.

Contractor shall complete a Payroll and Wage report in such form as to validate the list of employees assigned to the Contract per billing cycle, which shall be made available to the Union County Contract Manager and/or his designee. The monthly payment will not be made until any such requested report is received and found acceptable by the Union County Contract Manager and/or his designee.

4.1.14 PROTECTION OF COUNTY PROPERTY

During execution of the work, the Contractor shall take special care to protect County property including furniture, walls, baseboards, and other surfaces from materials not intended. Accidental splashes shall be removed immediately. The Contractor shall return areas damaged as a result of work under this contract to their original condition, to include painting, refinishing, or replacement, if necessary.

4.1.15 QUALITY ASSURANCE & QUALITY CONTROL

The County will require the Contractor's supervisor to conduct weekly quality inspections for review by the Union County Contract Manager, or designee. Within 30 days of the award of the contract, the Contractor will submit a sample form for review and approval by the Union County Contract Manager, or designee. The Contractor will submit (at minimum) a monthly schedule of cleaning activities for cleaning of: windows (interior and exterior), carpet, tile and grout, VCT and LVT.

4.1.16 ATTENDANCE

The County requires the contractor to record daily attendance and provide weekly and monthly attendance reports to the Union County Contract Manager, or designee, for review. Within 30 days of the award of the contract, the Contractor will submit a sample report for review and approval by the Union County Contract Manager, or designee. These reports may be used to determine work not completed and compliance to coverage plans or support any claims for damages to the County.

4.1.17 COVERAGE PLAN

Within 30 days of the award of the contract, the contractor will be required to submit a general coverage plan that makes provisions for the coverage of absences in order to complete the required cleaning activities of this contract. A typical plan might include temporary reassignments, increases to the daily work schedule, sub-contracted labor or any other means available to the contractor.

4.1.18 MULTI-SITE DAY PORTER PLAN

Within ten days of award of the contract, Contractor will provide a staffing plan to fulfill the requirements of the Multi-site Day Porter tasks. This plan should include daily assignments at each location and description of transportation logistics. This plan will be submitted to the Union County Contract Manager, or designee for review and approval prior to implementation of the plan.

4.1.19 NOTIFICATION OF NEW EMPLOYEES

When an employee is terminated, leaves permanently, or goes on vacation, Contractor shall notify the County in writing the persons' name(s) who left, the persons' name(s) who will be replacing them, the area person will be working and qualifications of the new employee. These employees shall be provided a security badge before they can begin work in the County's facilities.

4.1.20 SAFETY DATA SHEETS (SDS)

The Contractor shall provide manufacturers technical literature, specifications, and Safety Data Sheets (SDS) on all materials to be used within (15) days prior to commencement of services. Accurate Safety Data Sheets will be maintained and a copy of each product shall be placed in each "Janitorial Closet" or as designated by the County. The file shall be made available to the County 24 hours a day, seven days a week. Contractor or their Sub-Contractors must have safety plans, including records of training staff and methods of training for safety. These safety plans will be provided to the Union County Contract Manager upon request.

4.1.21 SECURITY

While performing work within the County's facilities, all buildings shall remain locked, and Contractor's personnel will not admit anyone into said facilities, except authorized Contractor or County personnel. On completion of nightly activities, all lights will be turned off, doors locked, draperies closed, and offices left in a neat and orderly condition.

4.1.22 SUPPLIES TO BE OF INDUSTRY STANDARD

Contractor to supply and use only Commercial Grade Vacuum cleaner at all facilities. Floor finishers to be of high-speed variety. All equipment must be in good working condition and ready for inspection. All materials and equipment used on the job site must be OSHA approved. All cleaning chemicals must have SDS Sheets visibly posted in the janitors' closets. It shall be the responsibility of the Contractor to update these sheets and provide them.

4.1.23 STAFFING PLAN

The Contractor shall submit a staffing plan as part of the proposal indicating the number and type of positions that will be regularly assigned to the project and will constitute the on-site staff as referenced in this RFP. This includes, but is not limited to, shift schedules, staff complements and staff organization in terms of certification and license as well as duties. Identify the management team who will be accountable for the project and the technical personnel that will support the project. This should include a full description of the experience and capabilities of the proposed Contract Manager and other key on-site staff. Staffing should include the full staff complement required to discharge the responsibilities described herein. The basis of the staffing plan and any industry standards used such as ISSA, APPA, etc. should be referenced.

4.1.24 TRANSITION APPROACH

The Contractor shall submit its proposed transition plan for transitioning the management of the buildings and the services to the new contract. The transition plan will clearly define the roles of the County, existing Contractor and the new Contractor, including any expectations the Contractor has for other parties to provide services that are critical to a successful transition.

4.1.25 WORK CONTROL

The Contractor shall implement all necessary work control procedures to ensure timely accomplishment of work requirements, as well as to permit tracking of work in progress. The Contractor shall plan and schedule work to assure material, labor, and equipment are available to complete work requirements within the specified time limits and in conformance with the quality standards established herein. Verbal scheduling and reports on the status of service call(s) and indefinite quantity work items shall be provided when requested by the County.

4.1.26 WORK SCHEDULE

The Contractor's initial work schedule shall indicate the hours of the day and frequency of services that will be performed. The schedule shall list the type of work to be performed, the areas to be worked, and the estimated time to complete the work in each area. When scheduled services fall on a holiday alternate dates shall be specified. The initial work schedule shall be submitted to the County for approval within 30 days after award. Once approved, all work shall be performed in strict compliance with the work schedule to facilitate the County's inspection of the work. Changes to the work schedule shall be submitted and approved by the Union County Contract Manager prior to implementation.

4.1.27 VIDEO CAMERAS

The County reserves the right to install and utilize video cameras for the purpose of surveillance to determine if work is being performed at all of the locations within the contract.

4.1.28 FAMIS WORK ORDER SYSTEM

The County will require the Contractor's supervisor to utilize the FAMIS work order system where janitorial work orders will be assigned on an as needed basis.

4.2 JANITORIAL SERVICE REQUIREMENTS

The Contractor shall provide the janitorial services described herein.

Basic services shall be performed at the locations and frequencies shown in Appendix A Section I & II, and Section 4.3 and shall consist of the services listed for the specified spaces. Furniture or other equipment (including waste containers) moved while performing basic services shall be returned to their original position. All basic services will be paid for under the firm fixed-price portion of the contract. Performance requirements for these services include the following:

4.2.1 GENERAL REQUIREMENTS

- A. Ashtrays and Receptacles.** All exterior ashtrays and ash receptacles shall be emptied and cleaned free of butts, debris, and tobacco residue. Replace sand as necessary, material to be provided by the Contractor.
- B. Baseboards, Kick Plates.** Baseboard will be wiped with a damp cloth after vacuuming and be free of dust, smudges, stains, and scuff marks. Spot clean with a mild cleansing agent. All metal kick plates will be free of streaks.
- C. Damp Mopping.** Prior to damp mopping, floors shall be swept/dust mopped. Floors shall be damp mopped to remove dirt, streaks, smears, and stains. Mop water must be replaced often.
- D. Deep Carpet Cleaning.** Prior to steam cleaning, carpets and rugs shall be vacuumed free of all loose soil and debris. Carpets and rugs shall be steam cleaned free of streaks, stains, and spots, and shall have a uniform color. Steam Cleaning shall be done by the water extraction method. After drying, furniture or other equipment temporarily moved for the steam cleaning shall be returned to their original positions.
- E. Dust Mopping.** Quarry tile, ceramic tile, concrete, rubberized surfacing, and vinyl composite tile flooring shall be dust mopped using a treated mop, paying particular attention to corners, behind doors, and around heavy furniture legs and bases. Light furniture, such as chairs, trash cans, and cigarette stands, shall be moved for the purposes of dust mopping, and returned to its original position. All spills and stains will be removed with a damp mop or cloth. Baseboards will be wiped with a treated dust cloth after dust mopping. Spot clean where necessary to remove spills and smudges.
- F. Dusting.** Using a treated dry or damp dust cloth, wipe all furniture tops, chair legs, partitions, and desks. Dust wipe all horizontal surfaces within reach, including window sills (inside and outside), countertops, baseboards, ledges, picture frames, doorframes, blinds, moldings and sills on glass and banker type partitions. Wipe clean telephones, light fixtures, and other accessories. If present, chalk boards, chalk trays, and erasers shall be cleaned. Surfaces shall be free of all dirt and dust, dust streaks, lint, and cobwebs.
- G. High Dusting.** All high dusting shall include dusting beyond the reach of normal day- to-day dusting but is not limited to all hanging lights, ledges, sills, charts, picture frames, moldings, shelves, and other horizontal surfaces.
- H. Elevators.** Elevator walls, doors, and jams shall be wiped down to remove all marks, streaks, and smudges and shall be polished to a uniformly clean and bright appearance. All door tracks will be wiped clean, removing all dirt, stains, and debris, using a vacuum, and edging tools. Track shall be left in a uniformly bright, clean condition.
- I. Furniture.** Performance requirements include the following:

- i. Conference tables, lunchroom tables, common area tables, side tables, and non-upholstered chairs shall be damp wiped using a mild cleansing agent where necessary to remove all marks, streaks, smudges, and hand prints.
 - ii. Counters, sinks, microwave ovens both inside and out, refrigerators, and cabinets shall be damp wiped using a mild cleansing agent where necessary to remove all marks, streaks, smudges, and hand prints. Clean and replenish supply dispensers (paper towel, soap).
 - iii. County Patio and Deck area furniture including tables, chairs, benches, and rails shall be damp wiped using a mild cleansing agent where necessary to remove all marks, streaks, smudges and handprints.
 - iv. Vacuum upholstered furniture to remove all dirt. Extraction clean with an approved cleaner.
- J. Glass.** Glass is clean when all glass surfaces are without streaks, film, deposits, and stains and has a uniformly bright appearance and adjacent surfaces have been wiped clean.
- i. Glass doors, panels, and partitions will be spot cleaned to remove any fingerprints, smudges, and stains.
 - ii. Glass doors, panels, and partitions will be thoroughly washed using an approved cleaner and dried, free of any fingerprints, smudges, and stains.
- K. Cleaning Exterior and Interior Glass.** The Contractor shall spot clean all exterior and interior window frames, sills, and sashes. This includes the removal of all cobwebs from the window area. When cleaning of all glass surfaces is performed, glass and entire sills, frames, and sashes shall be cleaned and left free of streaks and stains, and shall be wiped dry. All paint, putty, film, and foreign matter found on glass surfaces shall be removed. Contractor will be required to conform to all OSHA regulations.
- L. Metalwork.** All metalwork such as Drinking Fountains, plumbing fixtures, dispensers, door hardware and frames, metal lettering, and signs shall be wiped clean and be free of smudges, stains, scuff marks, deposits, tarnish and hand marks. Drinking Fountains shall be cleaned and disinfected. All surfaces of drinking fountains shall be kept free of stains, and smudges. Cleaner shall be removed from adjacent surfaces.
- M. Mats (Interior and Exterior).** Each time floors are swept/dust mopped or vacuumed, walk-off mats in that area shall be cleaned. Soil and moisture underneath mats shall be removed and the floor shall be cleaned as appropriate along with the rest of the floor. The mats shall be returned to their original locations afterwards.

N. Policing Grounds. Paper, bottles, cans, and all other trash and refuse shall be removed from all stairwells, parking lots, interior hallways, and interior court areas of the buildings. All removed items shall be deposited in the nearest waste/recycling container.

O. Recycling. Recycling containers and bulk recycling containers are located throughout Union County facilities. Contractor's employees should ensure that recycling containers are NOT emptied into the regular trash, but into the approved Recycling Collection Bins. Participation in the Union County Recycling Program is required of the Contractor(s). All recycling separation containers shall be emptied, and its contents moved as directed by the County.

P. Restroom Services. All Restrooms shall be cleaned thoroughly in accordance with the following tasks, and all tasks shall be completed and restrooms ready for employees. The tasks shall consist of the following services to be performed:

- i. **Cleaning Restrooms.** Pick up debris and trash, then sweep floor. Removed materials are not to be swept outside of the restroom. Empty trash and napkin receptacles, replace liners nightly. Check and fill all dispensers as needed. Remove all cobwebs, and other foreign materials from doors, walls, ceilings, partitions, vents, etc. Perform high and low dusting of ledges, tops of partitions, etc. using a dampened cloth.

Disinfect the inside of the urinals and toilets. Disinfect the top and bottom of toilet seats, fixtures, and surfaces surrounding each fixture. Disinfect and scrub outside of toilets, urinals, and rear wall paying special attention to chrome plates on walls. Disinfect stall walls and other areas where hands are normally placed. Clean doors and door frames.

Disinfect and wipe down tile walls paying special attention to the area around the urinals, under sinks, chrome and metal plates on walls and around floor drains. Disinfect and mop floors, making sure that corners, drains, areas around toilets, and feet of the partitions are thoroughly cleaned and there is no accumulation of dirt or other matter. Leave floor as dry as possible. Wipe off toilet bowl and base and remove any mop strands caught around posts, etc. Keep first row of wall tile, where it meets the floor, free of dirt & scum accumulation as a result of floor mopping. Disinfect trash containers, and napkin receptacles. Clean mirrors thoroughly. Disinfect and scrub sinks and counters paying special attention to corners, cracks, and narrow areas. All areas are to be left clean and free of streaks, stains, film, debris, water spots, and odors. All fixtures shall be clean, including piping, switch plates, etc. Brushes, sponges, and cloths that have been used to clean any other part of the restroom (including water closets, urinals, walls, floors, and partitions) shall not be used to clean lavatories or sinks, Contractor shall use color coding of brushes, sponges and clothes, for differentiating. Floor drains shall be cleaned and flushed with a disinfectant. All metal fixtures and hardware shall

be cleaned. If present, shower stall enclosures, shower stall curtains and locker/dressing rooms shall be considered part of the restrooms and cleaned accordingly.

- ii. **Additional Restroom Cleaning.** Walls and metal partitions are to be washed with water and germicidal solution and wiped dry and polished to a uniformly bright, clean condition. Air registers shall be dusted with a treated cloth or dust mop. Wipe down all ceramic tile walls with a disinfectant.
 - iii. **Stocking Restrooms.** Shall include inspecting, replenishing, and cleaning supply dispensers. Restroom supplies shall include, but are not limited to, paper towels, toilet tissue, mist dispensers, and soap. In addition, restroom counters & floors will be wiped for cleanliness and dryness every night. Day porter shall service intermittently during the daytime hours.
- Q. Scrub Hard Tile Floors.** All hard tile floors will be scrubbed using a disinfectant. Grout lines will be cleaned on tile floors to remove any mildew and stains. Floor will then be refinished and polished, and left in a uniformly bright, clean condition. All finish spills and splashes will be completely removed from baseboards, walls, doors, and frames. Scrubbing is satisfactorily performed when all surfaces are without embedded dirt, cleaning solution, film, debris, stains and marks, and standing water, and the floor has a uniformly clean appearance.
- R. Stripping and Re-waxing Floors.** Resilient flooring shall be swept/dust mopped and stripped to remove all built-up wax and imbedded dirt prior to re-waxing. After application of wax, including corners. The re-waxed floor shall present a clean appearance free from scuff marks or dirt smears. Furniture or other equipment moved during floor stripping and re-waxing shall be returned to their original positions. Standard of five minimum coats and 25% of solids.
- S. Waxing and High-Speed Buffing (Top Scrubbing).** All waxed areas will be spray buffed sufficiently for maximum gloss and removal of surface dirt, and have a uniform appearance. Contractor shall use an approved wax product with an adequate slip resistance rating. The floors shall be returned to a uniform gloss finish free from dirt, traffic marks, and stains.
- T. Exterior Area Policing.** All exterior stairwells, decks, patios, walkways, receiving docks, and bare concrete landings shall be swept or blown of all dirt, dust, grit, lint, and debris. All spills and stains will be removed with a damp mop.
- U. Vacuuming Carpets.** Carpeted areas shall be vacuumed free of all loose soil and foreign substances, and edge cleaned with a small broom or edging tool, paying particular attention to corners, behind doors, behind and underneath desks and around heavy furniture legs and bases. All chairs, trash cans, and

recyclable bins, shall be moved for the purposes of vacuuming, and returned to their original position.

V. Spot Cleaning Carpet. Carpeted areas will be spot cleaned to remove any and all stains. Spots that cannot be removed effectively must be reported to the Union County Contract Manager.

W. Waste Containers. All waste containers shall be emptied, and plastic liners replaced.

- i. Boxes, cans, bottles, and other items placed adjacent to waste containers and marked "TRASH" shall also be removed and disposed of. All waste collected shall be disposed of as directed by the County. Waste that falls on the floor and outside grounds during the waste removal shall be picked up and disposed of by the Contractor.

4.3 FACILITIES AND SCHEDULES

4.3.1 ADULT PROBATION

Facility Cleaning Services to Be Provided:

- Night crew only (see Attachment A, Section I for task schedule).

Services & Schedule:

- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.2 CROOKED CREEK WRF

Facility Cleaning Services to Be Provided:

- Night crew only (see Attachment A, Section I for list of services).

Services & Schedule:

- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.3 FARMERS MARKET

Facility Cleaning Services to Be Provided:

- Night Crew only (see Attachment A, Section I for list of services).

Services & Schedule:

- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.4 GOVERNMENT CENTER

Facility Cleaning Services to Be Provided:

- One (1) full-time day porter (see Attachment A, Section II for task schedule)
- Night crew (see Attachment A, Section I for task schedule)

Limited Access Areas:

1. Human Resources and Central Administration: cleaned between the hours of 8:00 a.m. and 5:00 p.m., Monday through Friday, no nighttime access. For further specifications see Attachment A, Section II.B.
2. 911 Call Center: cleaned between the hours of 8:00 a.m. and 5:00 p.m., Monday, Wednesday, Friday, no nighttime access. For further specifications see Attachment A, Section II.B.

Services & Schedule:

- Day Porter Basic Service: Monday – Friday / During Normal Business Hours
- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.5 HISTORIC COURTHOUSE

Facility Cleaning Services to Be Provided:

- One (1) Multi-Site Day Porter (see Attachment A, Section II and Section III.A. for task schedules)

Multi-Site Day Porter will clean this facility five (5) days a week. Multi-Site Day Porter will travel to UCPS Administration Building.

Special Events: Contractor is responsible for cleaning and stocking products during scheduled events. Contractor will be given prior notification before event takes place.

Services & Schedule:

- Day Porter Basic Service: Monday – Friday / During Normal Business Hours

4.3.6 HISTORIC POST OFFICE

Facility Cleaning Services to Be Provided:

- Night Crew only (see Attachment A, Section I for task schedule).

Services & Schedule:

- Standard Janitorial Services: Monday – Friday / After Normal Business Hour

4.3.7 HUMAN SERVICES

Facility Cleaning Services to Be Provided:

- Two (2) full-time day porters (see Attachment A, Section II for task schedule)
- Night crew (see Attachment A, Section I for task schedule).
For further specifications on cleaning the clinic areas, etc. see the task schedule in Attachment A, Section I.J.

Services & Schedule:

- Day Porter Basic Service: Monday – Friday / During Normal Business Hours
- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.8 MAIN LIBRARY & BOARD OF ELECTIONS

Facility Cleaning Services to Be Provided:

Main Library:

- One (1) full-time day porter (see *Attachment A, Section II* for task schedule)
- Night Crew (see *Attachment A, Section I* and *Section I.H* for task schedule)

Board of Elections (Limited Access Area):

- Cleaned Monday through Friday during the day by the Main Library Day Porter.
- Night crew not allowed in this area. Cleaned between the hours of 8:00 a.m. and 5:00 p.m., Monday through Friday only.

Services & Schedule:

- Day Porter Basic Service: Monday – Friday / During Normal Business Hours
- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.9 MARSHVILLE LIBRARY (LOIS MORGAN EDWARDS LIBRARY)

Facility Cleaning Services to Be Provided:

- One (1) Multi-Site Day Porter (see *Attachment A, Section II* for task schedule)
- Night Crew (see *Attachment A, Section I* and *Section I.H* for task schedule).

Multi-Site Day Porter will clean this facility once a week. Multi-Site Day Porter will travel to Marshville Library, Union West Library, and Waxhaw Library throughout the week.

Services & Schedule:

- Day Porter Services: One Day a Week During Normal Business Hours
- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.10 PATTON AVENUE COMPLEX

Facility Cleaning Services to Be Provided:

• ***Fleet Building:***

Night Crew (see *Attachment A, Section I* for task schedule)

• ***Tire Shop Building (Restroom only):***

Night Crew (see *Attachment A, Section I* for task schedule)

• ***Radio Shop (Offices and Restroom):***

Night Crew (see *Attachment A, Section I* for task schedule)

Services & Schedule:

- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.11 UC WATER OPERATIONS CENTER

Facility Cleaning Services to Be Provided:

- **Administration Building:**
Night Crew (see Attachment A, Section I and Section I.K for task schedule)
- **Warehouse (Office Area & Restroom only):**
Night Crew (see Attachment A, Section I for task schedule)
- **Equipment Building (Restroom only):**
Night Crew (see Attachment A, Section I for task schedule)
- **Maintenance Shops (Office and Restroom only):**
Night Crew (see Attachment A, Section I for task schedule)

Services & Schedule:

- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.12 JUVENILE PROBATION

Facility Cleaning Services to Be Provided:

- Night Crew only (see Attachment A, Section I for list of services).

Services & Schedule:

- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.13 12 MILE WRF

Facility Cleaning Services to Be Provided:

- Night Crew only (see Attachment A, Section I for list of services).

Services & Schedule:

- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.14 UCPS ADMINISTRATION BUILDING

Facility Cleaning Services to Be Provided:

- One (1) Multi-Site Day Porter (see Attachment A, Section II for task schedule)
- Night Crew (see Attachment A, Section I for task schedule).

Multi-Site Day Porter will clean this facility five (5) days a week. Multi-Site Day Porter will travel to the Historic Courthouse.

Services & Schedule:

- Day Porter Basic Service: Monday – Friday / During Normal Business Hours
- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.15 UNION WEST LIBRARY

Facility Cleaning Services to Be Provided:

- One (1) Multi-Site Day Porter (see Attachment A, Section II for task schedule)
- Night Crew (see Attachment A, Section I and Section I.H for task schedule).

Multi-Site Day Porter will clean this facility three times a week. Multi-Site Day Porter will travel to Marshville Library, Union West Library, and Waxhaw Library throughout the week.

Services & Schedule:

- Day Porter Services: Three days a week during normal business hours
- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.16 PROGRESS BUILDING

Facility Cleaning Services to Be Provided:

- Night Crew only (see Attachment A, Section I for list of services).

Services & Schedule:

- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.17 SOUTHWEST LIBRARY

Facility Cleaning Services to Be Provided:

- One (1) Multi-Site Day Porter (see Attachment A, Section II for task schedule)
- Night Crew (see Attachment A, Section I and Section I.H for task schedule).

Multi-Site Day Porter will clean this facility once a week. Multi-Site Day Porter will travel to Marshville Library, Union West Library, and Waxhaw Library throughout the week.

Services & Schedule:

- Day Porter Services: One Day a Week During Normal Business Hours
- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.3.18 RAW WATER INTAKE

Facility Cleaning Services to Be Provided:

- Night Crew only 2 (two) times a week (see Attachment A, Section I for list of services).

Services & Schedule:

- Standard Janitorial Services: Tuesday and Thursday / After Normal Business Hours

4.3.19 YADKIN WATER TREATMENT PLANT

Facility Cleaning Services to Be Provided:

- Night Crew only (see Attachment A, Section I for list of services).

Services & Schedule:

- Standard Janitorial Services: Monday – Friday / After Normal Business Hours

4.4 GROSS ESTIMATED CLEANABLE SQUARE FOOTAGE

Facility	Gross Square Footage	Estimated Cleanable Square Footage
Adult Probation	9,000	9,000
Farmers Market	11,920	4,200
Government Center	144,000	131,360
Historic Courthouse	16,400	13,890
Historic Post Office	24,855	24,250
Human Services	143,728	131,092
Juvenile Probation	10,300	9,020
Lois Morgan Edwards Memorial Library	8,700	8,438
Main Library/Board of Elections	42,914	39,776
Progress Building	138,400	9,500
Southwest Regional Library	19,938	17,200
Union West Library	11,748	11,378
UCPS Administration	21,830	21,500
Patton Avenue Complex:		
Fleet Building	4,502	4,502

County Garage	6,027	N/A
Radio Shop	6,000	N/A
Tire Shop	1,984	36
UC Water Operations Center:		
Administration Building	10,130	9,780
Warehouse Building (Office Space)	8,355	820
Shops (Restrooms)	8,038	536
Equipment Building (Restrooms)	21,545	36
12 Mile WRF	5,473	3,388
Crooked Creek WRF	2,000	950
Raw Water Intake	1,880	1018
Yadkin Water Treatment Plant	10,000	6728
Total Square Footage	689,667	457,006

4.5 OTHER SERVICES

4.5.1 HOURLY SERVICES & FLOOR WORK

Contractor shall perform additional services on the agreed upon rate listed under “Hourly Services & Floor Work” found in Appendix B Section V. Contractor shall inform the County of the work completed on the next business day.

4.5.2 DISINFECTING SERVICES

The Contractor may be asked to provide services including the routine cleaning/disinfecting of frequently touched surfaces and high traffic public and common spaces.

High touch surfaces include (but are not limited to) tables, doorknobs, light switches, countertops, handles, desks, phones, keyboards, toilets, faucets, sinks, etc.

Contractor shall perform additional services on the agreed upon rate listed under “Hourly Services & Floor Work” found in Appendix B Section V.

4.6 MATERIALS

4.6.1 COUNTY FURNISHED MATERIALS & RESPONSIBILITIES

1. The County will only supply batteries for paper towel and air freshener dispensers for the Contractor's use on an as needed basis.
2. The County will provide trash, and recycling pickup for the dumpsters located at County facilities. Only trash and recyclables from County facilities may be placed in these dumpsters.
3. The County will provide reasonable work and storage space for the Contractor. The workspace provided must not be used by the Contractor for long-term storage or for providing services to clients other than the County. The determination of workspace area and location will be made by the County based on the efficient use of space. The County will coordinate with the Contractor before making such decisions.

4.6.2 CONTRACTOR FURNISHED MATERIALS

Janitorial materials and equipment shall be of the type and quality used in large-scale commercial cleaning operations, shall meet the requirements specified herein, and shall be approved by the County before use.

1. **Material Requirements.** All toilet supplies and janitorial materials and supplies provided by the Contractor shall be of commercial grade and quality. Within 15 days after award of this contract, the Contractor shall submit a list of the materials to be used for approval by the County. The list shall include the manufacturer's name and brand name.
2. **Equipment.** All power-driven equipment for vacuuming, floor scrubbing, waxing, and polishing shall be of the commercial type, mechanically sound, safe to operate, and in a condition that will not harm or excessively wear existing finishes and floor coverings.
3. **Automated and Robotic Commercial Floor Cleaners and Vacuums.** Automated and Robotic floor machines such as but not limited to autonomous vacuum sweeper, scrubbers and burnishers shall be provided by the Contractor for general use as needed and for special request.
4. **Vehicles.** A (minimum) 14-foot box truck with lift gate will be provided by the Contractor for the Driver/General Laborer position.

4.7 PUNITIVE CLAUSE

4.7.1 PAYMENT DEDUCTIONS; NONPERFORMANCE PENALTIES

- a) If, the judgment of the Union County Contract Manager or designee, Contractor is deemed non-compliant with the terms of the contract, the County may withhold a prorated amount from the Contractor's invoice for work not performed. The County will provide written notice to the Contractor of any work

not performed, any amount of payments to be withheld or deducted, and reasons for said action.

The Union County Contract Manager or designee will provide a written notice to the Contractor to correct certain deficiencies within specified time frames. Should the Contractor fail to correct deficiencies within the specified time frame, the Union County Contract Manager may deduct from the Contractor's payment, pro rata, those applicable portions of the Monthly Contract sum.

- b) Contractor will have a contingency plan to provide a reasonably trained day porter to back-up routine day porters in case of absence. Back-up day porters will be available so as to provide uninterrupted service to all County facilities. Failure to provide such service will result in a per occurrence penalty up to a prorated fee up to a maximum fee of \$250.00. Contractor will be notified of service failure by delivery of a "Janitorial Deficiency Notification".

4.7.2 PERFORMANCE DEFICIENCY NOTIFICATION

CONTRACTOR shall be notified of service failure by delivery of a "Janitorial Deficiency Notification" (*Appendix D*).

1. This notice will serve as formal notification that CONTRACTOR has incurred a service deficiency and that monies shall be deducted for non-performance by the CONTRACTOR.
2. The Performance Deficiency Notice will contain the acceptable time period for service correction. Upon Deficiency Notification, the correction will either be accepted or rejected. If accepted, part or all of the penalties may be waived, regardless of whether the COUNTY has incurred loss as a result of said service failure.

4.7.3 TERMINATION

After being notified of service failure on more than six (6) occasions during any six (6) month period of the Contract, the Contract may be terminated by Union County with written notice to the Contractor.

Union County may also terminate this Agreement at any time and for any reason upon ninety (90) days written notice to Contractor. Upon any termination of this Agreement, Union County shall pay Contractor only those fees outstanding and due through the date of termination.

5 DETAILED SUBMITTAL REQUIREMENTS AND INSTRUCTIONS

5.1 TERMS OF SUBMISSION

All material received from a person or company ("Respondent") in response to this solicitation shall become the property of Union County and will not be returned to the Respondent. Any and all costs incurred by a Respondent in preparing, submitting, or presenting submissions are the Respondent's sole responsibility and Union County shall not reimburse the Respondent. 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 Respondent 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 Respondent 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. Respondent 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 Respondent's materials which was properly labeled by the Respondent as a trade secret, Union County will notify the Respondent of the request and the date that such materials will be released to the requestor unless the Respondent obtains a court order enjoining that disclosure. If the Respondent fails to obtain the court order enjoining disclosure prior to that date, Respondent understands and agrees that Union County will release the requested information to the requestor on that date.

Furthermore, the Respondent 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 Respondent.

5.2 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

bidder's submitted proposal, all appendices and appendixes (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** – Experience and Required Standards
- **Section C** – Qualifications
- **Section D** – Staffing Plan
- **Section E** – Technical Approach
- **Section F** – Implementation Plan
- **Section G** – Quality Control
- **Section H** – Financial Qualifications
- **Section I** – Price Proposal
- **Section J** – Required Forms
 - Appendix B – Price Forms
 - Appendix E – Proposal Submission (signed)
 - Appendix F - Addenda Receipt and Anti-Collusion (signed)

5.2.1 SECTION A – COVER LETTER

Provide an overview of the proposed Janitorial Services including your firm's unique abilities to meet the project requirements as described in this RFP. Included exceptions to the RFP if any. The proposal must include a cover letter transmittal attesting to its accuracy. The cover letter should provide the name, address, telephone, and email address of the service provider along with the name, title, address, telephone number and email address of the executive that has the authority to legally contract with Union County. The cover letter may be a maximum of three (3) pages.

Each Offeror will make the following representations and warranty in its proposal Cover Letter, the falsity of which might result in rejection of its Proposal: "The information contained in this Proposal or any part thereof, including its 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/"

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.”

5.2.2 SECTION B – EXPERIENCE AND REQUIRED STANDARD

1. Provide information about the service provider’s overall experience in providing janitorial services to governmental and commercial facilities. Provide details (size of facilities, scope of responsibilities, duration of relationship and processes utilized) on representative contracts serviced by the provider within the past five (5) years. Provide current contact information for all such contracts.

Provide a complete list of the service provider’s contracts with information about the contracted scope of services, contract start date and client reference. Describe the service provider’s experience and capacity to serve governmental and/or commercial facilities.

2. This section establishes standards of experience and financial capabilities that the County requires for a service provider to be considered qualified. The County, at its sole discretion, will decide if a Janitorial Service provider meets the standards listed in this RFP.

Service provider must:

- Have been in the business of providing full service Janitorial Services experience in providing janitorial services to governmental and/or commercial facilities for at least five (5) years.
- Have existing full service Janitorial Service contracts comparable to the scope of work listed in this RFP for at least five (5) years.

- Have serviced at least three facilities during the past five (5) years that are comparable in size and complexity to the County’s facilities with a strong record of customer satisfaction.
- Have proven operational, managerial, and business systems that support service contracts to provide Janitorial Services for governmental and/or commercial facilities. Describe those systems and cite examples of past and present utilization.
- Have experience in successfully managing the transition between expiring and new Janitorial Services contracts. Site specific examples of the service provider’s transition experience that is comparable to the County’s facilities.
- Have experience in successfully implementing risk management and safety plans. Have a strong record of health, safety and environmental compliance. Provide the service provider’s current Occupations Safety and Health Administration (OSHA) recordable rate and Experience Modification Rate (EMR) and information about any health, safety or environmental violations within the last five years. Describe the service provider’s approach to meeting and guaranteeing safety compliance.
- Be able to furnish liability and property damage insurance with combined single limits for bodily and/or property damage as per the requirements of **Section 6.11 – Insurance Requirements**. Submit evidence of the ability to provide coverage in this amount.

3. References

Give contact information for three to five companies that your firm currently or previously provided Janitorial Services within the last five (5) years. Include the organization name and the following information:

- Company Name:
- Contact Persons Name and Title:
- Project Name:
- Project Start Date and End Date:
- Phone Number:
- Email Address:

5.2.3 SECTION C - QUALIFICATIONS

Service providers shall demonstrate their ability to meet the requirements of this RFP by providing the technical qualifications of the company, individual team members and any subcontracted service providers. The County reserves the right to conduct an independent investigation of the service provider’s technical qualifications by contacting project references, accessing public information, inspecting facilities or contacting independent parties. Additional information may be requested during the evaluations of technical qualifications. The service provider shall provide the following information to demonstrate its technical qualifications.

Corporate Profile

Include the full name, tax identification number, main office address and telephone and facsimile numbers of the service provider and the principal contact person. This shall include a description of the firm or organization (corporation, partnership, joint venture, etc.) that will serve as the contracting party. A project organization chart clearly delineating lines of authority within the organization is required. The history, ownership, organization and background of the service provider shall also be provided.

- If the service provider is a joint venture, the required information shall be submitted for each member of the joint venture firm. The service provider shall describe the history of the relationships among team members, including a description of past working relationships.
- The proposal shall also identify which portions of the work, if any, will be subcontracted. If subcontracted providers are proposed, the proposed contractual relationships between the service provider and all major partners and subcontracted providers relative to the project shall be outlined in the proposal.
- Identify when the service provider was organized and, if a corporation, where incorporated and how many years engaged in providing contract janitorial services under that name.
- Provide a description of the circumstances, if any, related to any County employee, Board of County Commission member or other officer, employee or person who is payable in whole or in part from the County that has or had any material direct or indirect personal interest in the service provider.
- Identify any of its janitorial service contracts that have been prematurely terminated during the past five (5) years including the client and the reason for the termination.
- Identify any lawsuits or claims filed against the contracting party over the last five (5) years

5.2.4 SECTION D - STAFFING PLAN

1. Identify the management team who will be accountable for the project and the technical personnel that will support the project. The service provider shall submit a staffing plan as part of the proposal indicating the number and type of positions at each location that will be regularly assigned to the project that will constitute the on-site staff as referenced in this RFP. This includes, but is not limited to, shift schedules, staff complements and staff organization in terms of certifications and licenses as well as duties. This should include a full description of the experience and capabilities of the proposed Contract Manager and other key on-site staff. Staffing should include the full staff complement required to discharge the responsibilities described herein. The basis of the staffing plan and any industry standards used such as ISSA, APPA, etc. should be referenced.
2. Include summary resumes for the management team that will be assigned to this project.

3. Include a summary chart to show the following for each assigned management staff, on-site supervisors, and technical personnel (if awarded this project).
 - List the percentage of time the designated staff listed above would be assigned to this project. Include the list of other active company projects and the percentage of commitment for each.

5.2.5 SECTION E - TECHNICAL APPROACH

Transition Approach:

The service provider shall submit its proposed transition plan for transitioning the management of the buildings and the services to the new contract. The transition plan will clearly define the roles of the County, existing service provider and the service provider, including any expectations the service provider has for other parties to be provided services that are critical to a successful transition.

Core Services:

The service provider shall submit its proposal for managing each of the core services including: standard janitorial services, day porter basic services, automated and robotic cleaning services specialty cleaning tasks, service calls for miscellaneous cleaning, driver/general laborer, and Agricultural Center events. The proposal should address labor, materials, supplies, equipment, and transportation.

5.2.6 SECTION F- IMPLEMENTATION PLAN

Submit an implementation plan that includes the Contractor's approach to staffing at all facilities in order to fulfill the requirements of janitorial, day porter, and general laborer services. This should include a summary of the number of staff assigned to each building and also include a plan of the use of automated and robotic cleaning machines.

5.2.7 SECTION G - QUALITY CONTROL PLAN

Submit a summary quality control plan for this project or project of similar scope and size.

5.2.8 SECTION H - FINANCIAL QUALIFICATIONS

Upon request, audited financial statements for the contracting entity for the past five (5) fiscal years must be submitted. The financial statements must include income statements, balance sheets and statements of cash flow. The County may also request additional financial information to support a firm's financial stability.

If the contracting entity is a publicly traded entity, provide any 10-Q reports that have been filed in the past year.

5.2.9 SECTION I - PRICE PROPOSAL

A separately sealed price proposal shall be provided. Price proposal tables are contained in this RFP for use by the service provider in preparing their price proposal.

- Complete Appendix B – Pricing Proposal Forms

5.2.10 SECTION J - REQUIRED SIGNATURE FORMS

Offerors must include signed copies of the following documents:

- Appendix B – Price Forms
- Appendix E - Proposal Submission Form
- Appendix F - Addenda Receipt and Anti-Collusion Form

5.3 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 respondents.
4. At its sole discretion, the Owner may ask written questions of Offerors, seek written clarification, and conduct discussions with Offerors on the RFPs.
5. 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.

5.4 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
Experience, Qualifications and Corporate Profile	15%
Staffing Plan	30%
Technical Approach, Implementation Plan and Quality Control	30%
Price Proposal & Compliance with Information in RFP	25%

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
Technical Approach, Staffing and Implementation Plan	60%
Price, Quality and Relevance of Interview/Presentation 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.

5.5 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.

5.6 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.

6 GENERAL CONDITIONS AND REQUIREMENTS

6.1 TERMS AND CONDITIONS

The contract award will have an initial term of two (2) years with three (3) one (1) year renewal options at the County's discretion, pending annual budget approval.

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.

6.2 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).

6.3 COST ADJUSTMENTS

The Unit Pricing for the Initial Term shall be based upon the response to this solicitation. However, the Unit Pricing for any Renewal Term may be adjusted at the beginning of such Renewal Term by multiplying the Unit Pricing effective in the previous term by the quotient of the All Urban Consumers Price Index (CPI-U) (South Region), Others Goods and Services, with the Index Period of 2025 - 2030 as published by the Bureau of Labor Statistics, United States Department of Labor, in effect ninety (90) days prior to the commencement date of the new Renewal Term divided by such CPI in effect for the same month one (1) year prior to such date. However, any Unit Pricing increase pursuant to the previous sentence shall be capped at a five percent (5%) increase from one term to the next. Any such Unit Pricing adjustment for a Renewal Term must be requested by the Vendor or County within thirty (30) days from the date of the County's notice of its exercise of an option to renew the Contract for a Renewal Term.

6.4 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.

6.5 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.

6.6 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.

6.7 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.

6.8 MINORITY BUSINESSES (MBE) OR DISADVANTAGED BUSINESSES (DBE)

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.

6.9 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.

6.10 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.

6.11 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.

6.12 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.

6.13 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.

7 APPENDIX A – FACILITY SERVICE & PERFORMANCE SCHEDULES

RFP 2025-056 Janitorial Services

Informational Purposes Only - Do not submit with proposal.

SECTION I. STANDARD JANITORIAL SERVICES TASK SCHEDULE

A. ENTRANCES, LOBBIES, RECEPTION, FOYER	FREQUENCY
Tiled and linoleum floors will be dust mopped and damp mopped/washed	5 days per week
Doormats will be lifted and vacuumed both sides.	5 days per week
Carpeted areas will be vacuumed and spot cleaned.	5 days per week
Litter receptacles will be emptied and cleaned.	5 days per week
Interior door and partition glass will be cleaned on both sides. Entrance doorframes, side glass panels and top glass panels will be cleaned.	1 day per week
Door glass will be kept free (clean) of stains, marks, finger and handprints etc.	5 days per week
Finger and other marks will be removed from walls to 2 meters (m) high.	1 day per week
Horizontal surfaces will be dusted.	1 day per week
Stainless steel kick plates will be cleaned.	1 day per week
Exterior garbage containers will be emptied and damp wiped.	5 days per week
Upholstered furniture will be vacuumed.	3 days per week
Wipe down the lobby tables and registration windows with anti-bacterial product.	5 days per week
B. STAIRS AND LANDINGS	FREQUENCY
Stairs and landings will be swept and damp mopped/washed	2 days per week
Doors will be kept free of finger and handprints	5 days per week
Handrails will be dusted and damp wiped	2 days per week
Walls will be spot cleaned to 2m high	1 day per week
Stainless steel kick plates will be cleaned	1 day per week
C. CORRIDORS, HALLWAYS	FREQUENCY
Tiled and linoleum floors will be dust mopped and damp mopped.	5 days per week
Carpeted floors will be vacuumed and spot cleaned.	5 days per week
Horizontal surfaces will be dusted.	1 day per week

Waste receptacles will be emptied and cleaned.	5 days per week
Drinking fountains will be cleaned.	5 days per week
Walls will be spot cleaned to 2m high.	1 day per week
Tiled and linoleum floors will be sprayed and buffed.	1 day per week
Kiosk, TV monitors, ATM Machines etc. will be cleaned and disinfected.	1 day per week
Door glass and partition glass will be cleaned on both sides.	1 day per week
D. ELEVATORS	FREQUENCY
Floors will be dust mopped and damp mopped/washed	5 days per week
Doors and wall will be kept free of finger and handprints	5 days per week
Glass ceiling panels will be cleaned	1 day per month
Stainless steel panels will be polished	1 day per week
Stainless steel panels and buttons will be kept free of finger and handprints	5 days per week
E. STAFF AND BREAKROOMS	FREQUENCY
Supplies will be replenished.	5 days per week
Upholstered furniture will be vacuumed.	3 days per week
Tables will be damp wiped.	5 days per week
Receptacles will be emptied and cleaned.	5 days per week
Walls will be spot cleaned to 2m high.	1 day per week
Non-upholstered chairs will be damp wiped.	5 day per week
Carpet will be vacuumed and spot cleaned.	5 days per week
Stainless steel sinks and counters will be cleaned.	5 days per week
Tiled and linoleum floors will be swept/dust mopped and damp mopped.	5 days per week
Deep clean furniture.	2 times per year
F. OFFICES	FREQUENCY
Tiled and linoleum floors will be swept/dust mopped and damp mopped.	3 days per week
Carpets will be vacuumed and spot cleaned.	3 days per week
Wastebaskets and recycling bins will be emptied and cleaned.	3 days per week
Furniture and horizontal ledges will be dusted.	1 day per week
Finger and handprints will be removed from walls and partitions will be spot cleaned to a height of 2m.	1 day per week

Telephones will be cleaned and disinfected.	1 day per week
Horizontal and vertical blinds dusted.	1 time per month
Horizontal and vertical blinds will be wiped clean.	2 times per year
G. BATHROOMS, SHOWERS, CHANGE ROOMS	FREQUENCY
All fixtures will be cleaned, i.e. bowls, urinals, basins, mirrors, chrome surfaces and interface.	5 days per week
Waste receptacles will be emptied and cleaned.	5 days per week
All supplies will be replenished. This may include toilet paper, paper towels, soap, and hand sanitizers.	5 days per week
Bathroom/change room walls will be spot cleaned to a height of 2m.	5 days per week
Bathroom/change room walls will be washed floor to ceiling.	1 time per month
Toilet partitions will be damp wiped.	1 day per week
Floors will be swept and damp mopped.	5 days per week
Floor drains will be primed.	1 time per month
Shower walls and floors will be washed floor to top of tile.	1 day per week
Clean shower curtains.	1 day per week
Walls and toilet partitions will be kept free of graffiti.	5 days per week
Floor drains will be cleaned and floor drain lids lifted and cleaned.	1 day per week
H. LIBRARIES	FREQUENCY
Carpets vacuumed throughout and spot cleaned.	5 days per week
Tile and linoleum floors dust mopped and damp mopped.	5 days per week
Waste receptacles emptied & cleaned.	5 days per week
Desk, bookshelves, counters, sills and ledges dusted.	3 days per week
Interior door and partition glass will be cleaned on both sides. Entrance doorframes, side glass panels and top glass panels will be cleaned.	1 day per week
Door glass will be kept free (clean) of stains, marks, finger and handprints etc.	5 days per week
Dust lighting fixtures up to 3m.	1 day per month
Walls, stairwells, railings, landings spot cleaned up to 2 m.	1 day per week
I. CONFERENCE ROOMS, MULTIPURPOSE ROOMS	FREQUENCY
Waste receptacles and recycling will be emptied.	5 days per week

Waste receptacles will be cleaned – cleaning to include wiping of outside and washing inside with disinfectant.	1 day per week
Carpets vacuumed.	5 days per week
Upholstered furniture vacuumed.	1 day per week
Tables damp wiped and/or polished based on the finish.	3 days per week
Walls spot cleaned to a height of 2 m.	1 day per week
Damp wipe chairs.	1 day per week
Carpets will be vacuumed and spot cleaned.	5 days per week
Tiled and linoleum floors will be dust mopped and damp mopped/washed.	5 days per week
Desks, counters, sills and ledges will be dusted.	1 day per week
Wipe computer, whiteboard, and TV monitors.	1 day per week
Floor grills will be cleaned.	1 day per month
Door glass and partition glass will be cleaned on both sides.	1 day per month
Horizontal and vertical blinds will be dusted.	1 time per month
Horizontal and vertical blinds will be wiped clean.	2 times per year
J. HEALTH DEPARTMENT¹ AND DENTAL CLINIC ROOMS	FREQUENCY
Sweep, wet mop and sanitize non-carpet areas and baseboards	5 days per week
Wash and sanitize all table tops, pedestals, chairs (including base of chairs), countertops, sinks, plumbing hardware and outside surfaces of cabinets (do not use abrasive cleaners)	5 days per week
Clean and sanitize walls, switch plates, glass, door jambs, doors, etc.	5 days per week
Empty, clean, sanitize all waste receptacles, and replace liners	5 days per week
Replenish towel, soap, and hand sanitizer dispensers	5 days per week
Sweep, wet mop and sanitize non-carpet areas and baseboards.	5 days per week
Wash and sanitize all table tops, pedestals, chairs, countertops, sinks, plumbing hardware and outside surfaces of cabinets (do not use abrasive cleaners)	5 days per week
Clean and sanitize walls, switch plates, glass, door jambs, doors, etc.	5 days per week
Wipe glass windows in interview rooms & remove handprints and fingerprints.	5 days per week

¹ This includes operator (exam) rooms, panoramic x-ray room, sterilization room, and workroom.

Clean and dust check-in counters and tables in waiting rooms (white top surfaces) and chairs	5 days per week
The glass around the reception desk and the framing holding the glass should be cleaned and dusted.	5 days per week
Clean and sanitize dental chairs	5 days per week
Clean and sanitize the base under dental chairs	5 days per week
K. UC WATER OPERATIONS CENTER	FREQUENCY
Sweep/dust mop, wet mop all non-carpet areas	5 days per week
Vacuum carpeted areas	5 days per week
Dust all horizontal furniture, including but not limited to tables, file cabinets, book cases, chairs, partitions, window sills, etc.	5 days per week
Spot clean walls, switch plates, glass, door jambs, doors, etc. as needed	5 days per week
Clean and sanitize handrails and other horizontal surfaces which do not get acceptably clean by dusting	5 days per week
Sweep/dust mop, wet mop all non-carpet areas	5 days per week
Vacuum carpeted areas	5 days per week
Dust all horizontal furniture, including but not limited to tables, file cabinets, book cases, chairs, partitions, window sills, etc.	5 days per week
L. OTHER AREAS - GENERAL CLEANING SERVICES – (AREAS NOT SPECIFIED)	FREQUENCY
Furniture will be spot cleaned	Weekly
Mops to be cleaned/laundered to avoid odor	Weekly
Floor will be spray buffed	Monthly
Dust exterior doors and frames of lockers, partitions, and ledges	Weekly
Thoroughly clean all floor drains – flush with water and an enzyme product	Weekly
All linoleum floors will be swept with a treated dust mop; spillage will be removed	3 times per week
All carpets will be vacuumed and all stains removed	3 times per week
Finger marks will be removed from glass desks, table tops, door glass, and display cases	3 times per week
Finger marks and smudges will be removed from walls and other surfaces, where accessible	3 times per week
All graffiti shall be removed as it appears	Daily
Exterior sidewalk cleaning; all sidewalk extensions of buildings to be swept and kept clean 15 feet on either side of & perpendicular to entrance	Daily

All outside garbage receptacles at building entrance to be emptied daily	Daily
Clean and sanitize all waste receptacles, sinks, tables and countertops	Daily
Window ledges and tracks will be dusted and wiped	Monthly
All metal surfaces, including push plates and kick plates will be cleaned and polished	Monthly
Spot cleaning of ceramic tile grout	Monthly
Clean the interior of all paper towel and soap dispensers	Monthly
Wipe all exterior furniture	Daily
M. PROJECT WORK	FREQUENCY
Wash all walls in entrances, hallways and lobbies	1 time per year
Hard surfaces scrubbed and recoated (two coats)	2 times per year
Hard surfaces burnished	2 times per year
Hard surfaces stripped and refinished	1 time in 1 years
Hard surfaces spray buffed	1 time per month
Wash walls in offices	1 time per year
Extraction clean all carpets	1 time per year
Deep clean all fabric furniture, wash all vinyl/plastic furniture	2 time per year
Wash all building outside perimeter windows	2 times per year
All interior glass unless otherwise specified	2 times per year
All supply, return and exhaust air diffuser grills will be vacuumed and washed	2 times per year
Clean and sanitize tables and chairs including tops and underneath surfaces, legs and arms including removing gum, etc.	2 times per year

Note: Not all areas will receive floor care at the frequencies noted and reductions may be made for low traffic areas and increase for high traffic areas.

SECTION II. DAY PORTER BASIC SERVICE TASK LIST

A. DESCRIPTION OF DAILY TASKS
<i>Note: No flammable materials shall be stored in areas unless in approved containers. All containers must be labeled at all times. A complete set of up-to-date SDS sheets must be available at all times. All mops are to be stored in mop holders and mop buckets are to be emptied and stored dry. All soiled rags are to be removed weekly.</i>
Sweep/dust mop all public areas, stairs, and landings.
Restrooms: Wipe counters, sinks, and fixtures. Sweep floor.
Breakrooms: Wipe counters, sinks, and fixtures. Sweep floor. Wipe all appliances inside and out including microwaves, refrigerators, stoves, coffee makers, etc.
Replenish paper towels, toilet paper, and soap dispensers. Replace batteries as needed. (Batteries are provided by Union County).
Empty exterior trash cans and smoking receptacles.
Keep elevators free of debris, and wipe surfaces.
Wipe glass doors twice a day near public entrances.
Vacuum entrance mats.
Spot vacuum carpet.
Sweep and police loading dock.
Additional duties. Some properties may require additional cleaning services.

B. HIGH TRAFFIC AREAS ADDITIONAL DAILY TASKS
<i>Note: The following high traffic areas will require additional tasks to be performed daily.</i> <ol style="list-style-type: none"> 1. Government Center: Human Resources, Central Administration, and the Ground Floor. 2. Firing Range
Wet mop all non-carpet areas
Vacuum carpeted areas
Dust all horizontal furniture, including but not limited to tables, file cabinets, book cases, chairs, partitions, window sills, etc.
Spot clean walls, switch plates, glass, door jambs, doors, etc. as needed
Clean and sanitize handrails and other horizontal surfaces which do not get acceptably clean by dusting

SERVICE CALLS FOR MISCELLANEOUS CLEANING

Service calls for cleaning shall consist of providing miscellaneous cleaning tasks.

- A. The Contractor shall respond to service call requests for cleaning within two (2) hours during regular working hours. Once begun, the cleaning effort shall continue until completed.
- B. These calls include, but are not limited to, such items as: Cleanup of overflowed restroom fixtures. Clean up of spills. Cleaning muddy or wet entrances. Clean up of broken glass. Clean and disinfect feces, urine, vomit, or other bodily fluids.
- C. Service call work shall consist of providing labor and material to perform unscheduled janitorial services that are brief in the work required.

8 APPENDIX B – PRICING PROPOSAL FORMS

RFP 2025-056 Janitorial Services

Submit with proposal.

SECTION I. PRICING PROPOSAL INSTRUCTIONS

There are three pricing forms included in the RFP; The Pricing Proposal Form, driver/general labor, and hourly services and contract floor work.

Each section must be completed correctly or the entire proposal may be rejected. The entered totals for each building line i.e. a) Adult Probation, should reflect annual totals. Use dollar signs and commas to indicate dollar values.

Square footage, located in section 4.4 Gross Estimated Cleanable Square Footage, is not the primary indicator of required service levels; proposers should fully review the specific Facility Service & Performance Schedules in Appendix A. By submittal of a proposal, the Contractor acknowledges it has evaluated the required services and can perform such services as indicated in the proposal specifications.

SECTION II. PRICING PROPOSAL FORM

UNION COUNTY GENERAL GOVERNMENT FACILITIES

Facility		Vendor Calculated Net Cleanable Square Footage	Day Porter Services	Standard Janitorial Services	Annual Total
a)	Adult Probation				
b)	Farmers Market				
c)	Government Center				
d)	Historic Courthouse				
e)	Historic Post Office				
f)	Human Services				
g)	Juvenile Probation				
h)	Lois Morgan Edwards Memorial Library				
i)	Main Library/Board of Elections				
j)	Progress Building				
k)	Southwest Regional Library				
l)	Union West Library				
m)	UCPS Administration				
n)	<u>Patton Ave Complex:</u> Fleet Building County Garage Radio Shop Tire Shop				
Grand Totals:					

UNION COUNTY WATER FACILITIES

Facility	Vendor Calculated Net Cleanable Square Footage	Day Porter Services	Standard Janitorial Services	Annual Total
a) <u>UC Water Operations Center:</u> Administration Building Warehouse Building (Office Space) Shops (Restrooms) Equipment Building (Restrooms)				
b) 12 Mile WRF				
c) Crooked Creek WRF				
d) Raw Water Intake				
e) Yadkin Water Treatment Plant				
Grand Totals:				

Note: Reference Section 4.3 for services required at each building. Indicate N/A if the service is not required.

SECTION IV. DRIVER/GENERAL LABORER FORM

Services	Total Annual Rate
Driver/General Laborer	

JOB DESCRIPTION: This position will require the Contractor to provide a minimum 14 foot box truck with lift gate. The duties of a driver/general laborer include but are not limited to the following:

1. **Surplus:** move surplus items to and from various facilities
2. **Recycling:** pick up and empty recycling at all Union County properties three times a week.
3. **Shredding:** pick up and move boxes to shredding cage and then assist shredding vendor to dispose of material in boxes.
4. **General Upkeep:** Deodorize drains. Hose off boot scrapers. Remove grates and vacuum out tray of entrance mats. Check ash urns and refill sand as needed. Run water in the sinks of all janitorial closets. Clean ledges over front entrance and high windows in the Main Library. Empty trash in the Garage building at Patton Avenue complex.
5. **Set-Up & Move Furniture:** move and set-up furniture as requested.
6. **Police Grounds:** Paper, bottles, cans, and all other trash and refuse shall be removed from all stairwells, parking lots, and exterior court areas of the buildings. All removed items shall be deposited in the nearest waste/recycling container. Blow leaves and debris from vending area at the Government Center. Blow leaves off steps in the plaza near the outside vending machines of the Government Center every morning.
7. **Event Set-Up:** pick up tables, chairs, podium, or sound equipment as requested and arrange as needed.
8. **Other tasks as assigned.**

SECTION V. HOURLY SERVICES & CONTRACT FLOOR WORK FORM

Contract Floor Work	Per Square Foot	Minimum Charge
1. Strip and Wax Floors		
2. Carpet Extraction		
3. Carpet Cleaning		
4. Tile & Grout Cleaning		
Hourly Services	Regular Time	Overtime
Custodial Day Porter (hourly rate)		
Custodian		
Custodial Floor Specialist		
Custodial Manager		
Disinfecting Services		

9 APPENDIX C –LIST OF UNION COUNTY FACILITIES

**RFP 2025-056
Janitorial Services**

Informational Purposes Only - Do not submit with proposal.

JANITORIAL & DAY PORTER SERVICES AT VARIOUS COUNTY FACILITIES

I. LIST OF FACILITIES

FACILITY	ADDRESS
Adult Probation	2630F Nelda Drive Monroe NC 28110
Farmers Market	805 Skyway Dr, Monroe NC 28110
Government Center	500 N Main St, Monroe NC 28112
Historic Courthouse	300 N Main St, Monroe NC 28112
Historic Post Office	407 N Main St, Monroe NC 28112
Human Services	2330 Concord Ave, Monroe NC 28110
Juvenile Probation	604 Lancaster Ave, Monroe NC 28112
Lois Morgan Edwards Memorial Library	414 Hasty St, Marshville NC 28103
Main Library/Board of Elections	316 E Windsor St, Monroe NC 28112
Progress Building	1407 Airport Rd, Monroe NC 28110
Southwest Regional Library	1515 Cuthbertson Rd, Waxhaw, NC
Union West Library	123 Unionville-Indian Trail Rd, Indian Trail NC
UCPS Administration	400 N Church St, Monroe NC 28110
Patton Avenue	610A Patton Ave, Monroe NC
UC Water Operations Center	4600 A Goldmine Rd, Monroe NC 28110
12 Mile Creek WRF	8299 Kensington Dr, Waxhaw NC 28173
Crooked Creek WRF	4015 Sardis Church Rd., Monroe NC
Raw Water Intake	465 Bayshore Drive, Norwood, NC
Yadkin WTP	3522 New Salem Road, Monroe, NC

10 APPENDIX C – SAMPLE DEFICIENCY NOTIFICATION

**RFP 2025-056
Janitorial Services**

Informational Purposes Only - Do not submit with proposal.

JANITORIAL DEFICIENCY NOTIFICATION

Contractor:	Date:
Facility Location:	

Deficiency to be corrected:

Notification:

Payment deductions may be assessed by the County if deficiencies are not corrected by (Date): ____ The County may elect to utilize its own resources to rectify the deficiency at the Contractors expense.

Deduction for task(s) not performed:

Union County General Services:	Date:
Emailed/Mailed to:	

11 APPENDIX E - PROPOSAL SUBMISSION FORM

**RFP 2025-056
Janitorial Services**

Submit with proposal.

This Proposal is submitted by:

Company Legal Name: _____
Authorized Representative
Name: _____
Authorized Representative
Signature: _____
Representative Title: _____
Address: _____
City/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-proposal this project. Proposal is valid for 120 calendar days from the Proposal due date and is submitted by an executive of the company that has authority to contract with Union County, NC.

Name: _____
Title: _____
Authorized Signature: _____
Date: _____

12 APPENDIX F - ADDENDUM AND ANTI-COLLUSION FORM

**RFP 2025-056
Janitorial Services**

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 www.co.union.nc.us and/or www.ips.state.nc.us. 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: _____

13 APPENDIX G - VENDOR PAYMENT NOTIFICATION

**RFP 2025-056
Janitorial Services**

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.

14 APPENDIX H – TEMPLATE CONTRACT

RFP 2025-056 Janitorial Services

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. 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. **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.



Request for Proposals 2025-056

Janitorial Services

ADDENDUM No. 1

ISSUE DATE: June 24, 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.

Delete/Add/Replace Section

1. **DELETE:** the due date of ~~July 1, 2025, at 11:00 AM EST~~ in its entirety throughout the bid document and

REPLACE with the following due date and time: **July 17, 2025, at 11:00 AM EST**

***Addendum #2, addressing questions received, will be advertised prior to the due date for RFP 2025-056.**

End of Addendum No. 1



Request for Proposals 2023-056

Janitorial Services

ADDENDUM No. 2

ISSUE DATE: July 7, 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.

Delete/Add/Replace Section

1. Delete: (Throughout the document)

Waxhaw Library

Replace with: (Throughout the document)

Southwest Regional Library

2. 9 Appendix C – List of Union County Facilities.

Add: Attached Chart II. Estimated Quantity of Cleanable Rooms & Restrooms

Add: Attached Chart III. Estimated Visitors Per Month & Estimated Number of Employees Per Building

3. 10 Appendix C – SAMPLE DEFICIENCY NOTIFICATION

Delete: Appendix C (Title of Appendix Only)

Replace with: Appendix D (Title of Appendix Only)

Question/Answer Section

1. Question: Does the Project Manager need to be dedicated 100% to serving the facilities in this RFP or can this be a shared resource with other non-related facilities

Answer: Outside of requested porters & driver positions, staffing is the vendor's responsibility to completed requested contractual service.

2. Question: Will Special Events labor and materials for the Historic Courthouse be reimbursed or are they considered part of the base contract?

Answer: This is part of the base contract.

3. Question: In Section V of the RFP, Hourly Services & Contract Floor Work Form. Are the Contract Floor Work values reimbursable for all work or just for work requested above the normal cleaning frequency?

Answer: This is pricing for any services above base contract.

4. Question: What is the anticipated start date of the contract?

Answer: November 1, 2025

5. **Question:** Is the 14' box truck with lift mandatory, or will a pickup with a trailer suffice?

Answer: An enclosed box truck over 14' is required.

6. **Question:** Is there a Union Collective Bargaining Agreement in place for any of the facilities? If so, please provide the CBA and which facilities are unionized.

Answer: No.

7. **Question:** What is the breakdown of carpet to Tile to LVP to VCT to polished concrete to hard floor?

Answer: Unknown

8. **Question:** What is the term (in years) and value of the current contract?

Answer: Please submit a Public Records Request for previously awarded contract information at the link listed below.

Union County Public Communications - Public Records Request

9. **Question:** It appears that the initial contract term is for two base years. Should we only provide pricing for this 2 year period and utilize the cost escalation language found in the RFP (Section 6.3 Cost Adjustments page 38) after award for the 3 subsequent option years?

Answer: It is desired that the cost would not change should the contract last all optional renewal terms, otherwise section 6.3 and/or negotiated amended terms would be looked at.

10. **Question:** Do you have current contracted prices for the below facilities? If yes is the previous scope of work similar to this RFP's listed scope of work?

- a) Adult Probation
- b) Farmers Market
- c) Government Center
- d) Historic Courthouse
- e) Historic Post Office
- f) Human Services
- g) Juvenile Probation
- h) Lois Morgan Edwards Memorial Library
- i) Main Library/Board of Elections
- j) Progress Building
- k) Southwest Regional Library
- l) Union West Library
- m) UCPS Administration
- n) Patton Ave Complex: Fleet Building County Garage Radio Shop

Tire Shop

a) UC Water Operations Center: Administration Building Warehouse Building (Office Space)

Shops (Restrooms)

Equipment Building (Restrooms)

b) 12 Mile WRF

c) Crooked Creek WRF

d) Raw Water Intake

e) Yadkin Water Treatment Plant

Answer: Refer to Question/Answer Section, Item #8

11. Question: Please confirm the estimated SF, by location, of the hard surface flooring in scope for the required burnishing, spray-buffing, strip-wax, re-coating, etc.

Answer: Unknown

12. Question: Please confirm the estimated SF, by location, for the carpet areas in scope for the required extraction work.

Answer: Unknown

13. Question: For glass cleaning please confirm the 2x per year scope includes all interior and exterior window glass and interior partition glass, all floors, regardless of height.

Answer: All glass interior and exterior at all buildings regardless of height is part of the required scope of work.

14. Question: For window cleaning, please confirm if the 2x per year window cleaning is in scope for all areas of all sites or if windows in excluded areas like labs, garage areas, are also excluded from those areas.

Answer: All glass interior and exterior at all buildings regardless of height are part of the required scope of work. Areas not included in the scope are not required.

15. Question: Please confirm estimated employee count, by location, for all locations and if employees are generally on-site for 5 days a week or something less. If not available please provide estimates by site for current consumable billing amounts (i.e. paper towels, hand towels and any other consumables).

Answer: Refer to Add/Delete/Replace Section, Item #2

16. Question: Where material for sites that see a lot of visitors (libraries, Human Services, Board of Elections, Government Center), please confirm the estimated visitor traffic for each location, average per day. If not available please provide estimates by site for current consumable billing amounts.

Answer: Refer to Add/Delete/Replace Section, Item #2

17. Question: Please confirm the number of floor scrubbers currently on site and in use for floor scrubbing requirements.

Answer: Unknown.

18. Question: How many furniture items will require deep cleaning (fabric pieces in particular need to be estimated for accurate pricing vs. hard surface furniture that can be wiped down)?

Answer: Unknown.

19. Question: and would like to clarify the following?

- Current Contract End Date.
 - Begins November 1, 2025 with 2 years, plus three (1) year renewals.
- Current New RFP Release Date.
 - Refer to addendum #1
- Current Management/Staffing.
 - Unknown.
- Current Spend (annually)
 - Refer to Question/Answer Section, Item #8

Answer: See above.

20. Question: Could you please confirm whether there is a union representing the incumbent contractor's employees, or if there are any applicable living wage or minimum wage requirements under this contract? If so, we would appreciate any relevant details or documentation.

Answer: No Collective bargaining agreement. Higher wages are encouraged to motivate Custodial staff retention.

21. Question: Could you please clarify if there are any changes to the Scope of Work in this solicitation compared to the current contract with the incumbent contractor? If so, we would appreciate a summary of the key differences.

Answer: Contract was negotiated to reduce the number of buildings within the original scope.

22. Question: Could you please provide a breakdown of the total square footage by floor type (e.g., carpet, hard floor, vinyl, wood, ceramic, cement, etc.) across the facility? This information will help us ensure accurate labor planning and pricing.

Answer: Unknown.

23. Question: Could you please provide the total square footage or quantity of windows included in the scope of work?

Answer: Unknown.

24. Question: On the price form, for the SECTION V. HOURLY SERVICES & CONTRACT FLOOR WORK FORM – please confirm what will come under the header "Minimum Charge," is it the annual cost or per floor work cost?

Answer: This is pricing per square foot for any services above base contract.

25. Question: Per Section B – Experience, offerors are required to submit OSHA and EMR ratings. Could you please confirm the number of years for which this data should be provided?

Answer: Refer to Section 5.2.2 of the RFP document.

26. Question: Regarding the 14 Foot Box Truck requirement, is there already a suitable vehicle currently in use on site that can be purchased from the city or the incumbent contractor?

Answer: It is the responsibility of the contractor to provide a vehicle.

27. Question: What are the required hours for the Driver/General Labor Position?

Answer: The box truck is listed as a Contractor Furnished material in 4.6.2. and SECTION IV. DRIVER/GENERAL LABORER FORM lists the job description and specs.

28. Question: Is there a requirement to provide automated and robotic equipment? If so, which buildings are required to have this equipment?

Answer: It is encouraged as a strategy to assist staffing for cleaning large areas such as Human Services, Government Center, and Libraries.

29. Question: Can you disclose who the current contractor is and price being paid per month for services?

Answer: Refer to Question/Answer Section, Item #8.

30. Question: Are there any changes in the current scope of work compared to what is stated in RFP#2025-056?

Answer: No unforeseen changes at this time.

31. Question: Which facilities will only require daytime cleaning?

Answer: Refer to section 4.3 of the RFP document.

32. Question: Please confirm that the vendor awarded will be responsible for providing consumable products such as tissue paper/paper towels and soap?

Answer: The contractor shall provide all labor, supplies, supervision, tools, materials, equipment, and transportation necessary to provide janitorial and day porter services in accordance with the referenced specifications.

33. Question: Will the selected vendor be responsible for providing refills for sanitizers?**Answer:**
Yes

34. Question: What is the value of the current contract for these services?

Answer: Refer to Question/Answer Section, Item #8.

35. Question: Are the custodians working on this contract members of a union? If so, which union?

Answer: There is No Collective bargaining agreement in place.

36. Question: Is the scope of work on this project the same as the current contract? If not, how is it different?

Answer: Contract was negotiated to reduce the number of buildings within the original scope.

37. Question: What background check results would disqualify an employee from working at these locations?

Answer: Unknown.

38. Question: To what height are the windows cleaned?

Answer: Refer to Question/Answer Section, Item #13.

39. Question: What is the anticipated award date for this project?

Answer: Prior to September 1, 2025.

40. Question: What is the contract start date for this project?

Answer: Refer to Question/Answer Section, Item #4

41. Question: Please share the last 12 months contract value.

Answer: Refer to Question/Answer Section, Item #8.

42. Question: Are there any facilities that are going to increase/reduce their porter hours compared to the RFP?

Answer: No. Previous awarded contract is public information should detail be desired.

43. Question: Can you provide the current staffing numbers for each building?

Answer: Refer to Add/Delete/Replace Section, Item #2

44. Question: What are the current floor sqft for strip and wax per location?

Answer: Unknown

45. Question: How many restrooms are there in each facility?

Answer: Refer to Add/Delete/Replace Section, Item #2

46. Question: Please provide the volume for paper and soap or number of people per building or budget?

Answer: Refer to Add/Delete/Replace Section, Item #2

47. Question: Can you provide a breakdown of square footage per floor type per building to help provide the most accurate pricing?

Answer: Refer to Section 4.4 of the RFP document

48. Question: What are the biggest challenges with the current cleaning?

Answer: Consistent staffing and retention is the largest challenge.

49. Question: Who owns the floor care machines and equipment?

Answer: The contractor shall provide all labor, supplies, supervision, tools, materials, equipment, and transportation necessary to provide janitorial and day porter services in accordance with the referenced specifications.

50. Question: Can you provide the following regarding the current contract:

- a. Who are the current providers?
- b. What is the current annual contract value. What is the escalation percentage per year?
- c. Number of years the vendor has held the contract

Answer: Refer to Question/Answer Section, Item #8.

51. Question: Staffing

- a. Does your current vendor have a dedicated manager that manages the Janitorial Services. Does the country provide an office(s) for the vendor? If so, does the state provide a computer, cell phone, and office materials?

Answer: No office, computer, cell phone is provided for the vendor. Only access to work request system.

- b. What are the current wages that these positions are being paid currently:
 - i. Day Porters
 - ii. Cleaners
 - iii. Supervisors

Answer: Refer to Question/Answer Section, Item #8.

52. Question: Do you have a job description for the "Driver/General Laborer Position" mentioned on page 27 of the RFP? What is the Box Truck used for?

Answer: The box truck is listed as a Contractor Furnished material in 4.6.2. and SECTION IV. DRIVER/GENERAL LABORER FORM lists the job description and specs.

53. Question: Consumables

- a. What is the current occupancy per building, Employees and daily traffic

Answer: Refer to Add/Delete/Replace Section, Item #2

- b. Can you provide the types of Toilet paper, paper towel, soap dispenser and air freshener dispensers?

Answer: Unknown.

54. Question: Equipment:

- a. Is Automated and robotic equipment currently being used? If so, what types and what buildings?

Answer: Automated or robotic equipment is encouraged as a strategy to assist staffing for cleaning large floor areas such as Human Services, Government Center, and Libraries.

55. Question: Can the box truck be a used truck?

Answer: Refer to Question/Answer Section, Item #52

56. Question: Is it a requirement for employees to be drug tested?

Answer: Yes.

57. Question: 4.2.1 References cleaning interior and exterior glass. Can you confirm this applies to entryways only?

Answer: Refer to Question/Answer Section, Item #13.

58. Question: Appendix A Section M. should these include Appendix B Section V. Hourly Services & Contract Floor work?

Answer: Yes

59. Question: Is Appendix A Section M Project work supposed to be included in the cost of services for each building?

Answer: Yes

60. Question: Appendix A Section M Project work window cleaning interior and exterior can this be itemized by building?

Answer: Unknown.

61. Question: Employees who are servicing probation offices will they be required to be fingerprinted or have any addition background clearances in addition to 4.1.8?

Answer: Unknown.

62. Question: Will you provide the SQFT for the HR and 911 offices in the government center?

Answer: Refer to section 4.4 of the RFP document

63. Question: Will you provide the SQFT for the board of elections?

Answer: Refer to section 4.4 of the RFP document

64. Question: The two Libraries are open on Saturdays will they require any Saturday service?

Answer: Unless there is a special event that requires it, no Saturday service.

65. Question: Yadkin Water Treatment is missing section 4.3 does it have another name?

Answer: Yadkin Water Treatment Plant is listed in section 4.3.

66. Question: How long does it typically take to get access cards referenced in 4.1.12?

Answer: Ready within 1 day and contractor will have to pick them up.

67. Question: Would you be open to supplies billed back based on cost?

Answer: The contractor shall provide all labor, supplies, supervision, tools, materials, equipment, and transportation necessary to provide janitorial and day porter services in accordance with the referenced specifications.

68. Question: Can a company choose to send proposal to the building of they choice?

Answer: Proposal is for all included buildings list in the RFP Document.

69. Question: I want to know if you have the drawings for the buildings?

Answer: Yes, these can be made available to the chosen vendor.

70. Question: I want to know if you can provide the existing contract price? The company is doing now if you can?

Answer: Refer to Question/Answer Section, Item #8.

71.Question: Can you provide the Square Footage of each location?

Answer: Refer to section 4.4 of the RFP document.

72.Question: Has anything changed in the scope of work?

Answer: Contract was negotiated to reduce the number of buildings within the original scope.

73.Question: Are the current providers performing any additional tasks beyond what is listed in the RFP?

Answer: No. Previous awarded contract is public information should detail be desired.

74.Question: What is the official start date of the current contract? (In other words, how long has the contract been in place?)

Answer: November 1, 2023

75.Question: What is the incumbent price, and who is the incumbent vendor?

Answer: Refer to Question/Answer Section, Item #8.

76.Question: Are trash dumpsters at all the facilities listed in this scope of work?

Answer: Each location has a dumpster available.

77.Question: Is exterior and interior glass maintenance included in this scope of work for all the facilities?

Answer: Refer to Question/Answer Section, Item #13.

78.Question: UC Water Operations Center

- Will the Vendor be responsible to clean the outside designated area in the back of the building?

Answer: UC Water Operations office Administration building and the restrooms in the warehouse, shop and equipment building. The other storage areas do not need to be cleaned.

79.Question: Southwest Library

- Will the Vendor be responsible to clean the STEAM room?

Answer: Responsibility should include, trash, windows, and floors but no cleaning of equipment.

80. Question: The Driver/general laborer position, is this a union position?

Answer: There is no union or collective bargaining agreement.

a. If not, What is the SCA title that is associated with this position?

Answer: The box truck is listed as a Contractor Furnished material in 4.6.2. and SECTION IV. DRIVER/GENERAL LABORER FORM lists the job description and specs.

b. What is the minimum wage required?

Answer: No Collective bargaining agreement. Higher wages are encouraged to motivate Custodial staff retention.

81. Question: There are two locations that part of the Patton complex, County garage and Radio shop, please confirm that there are no required services at these locations.

Answer: Garage Office GSF: 9,374, Cleanable 5,244 (Office and Restrooms)
Tire Shop GSF: 2400, Cleanable 100 (Restroom)
Radio Shop GSF: 6000, Cleanable 800 (Restroom and Kitchenette)

82. Question: There are several locations on the 4.4 GROSS ESTIMATED CLEANABLE SQUARE FOOTAGE that have N/A. Is the vendor responsible for any service(s) at these locations (with NA Noted)? For example; Policing the Grounds, windows etc.?

Answer: Refer to Question/Answer Section, Item #81

83. Question: Is this a performance based specification?

Answer: Higher wages are encouraged to motivate Custodial staff retention.

84. Question: What is the current annual cost (price) of this contract? (Or monthly)

Answer: Refer to Question/Answer Section, Item #8.

85. Question: What is the daily foot traffic for each location?

Answer: Refer to Add/Delete/Replace Section, Item #2

86. Question: What is the average # of staff and the average # visitors?

Answer: Refer to Add/Delete/Replace Section, Item #2

87. Question: What is the total number of restrooms in this contract? Is it possible to get a breakdown or count per location?

Answer: Refer to Add/Delete/Replace Section, Item #2

88. Question: Is Aseptic cleaning required at any of the locations? (Example at the Dental Clinic?)

Answer: No, Appendix A, Section 1, J. lists these rooms.

89. Question: Is there a CBA or requirement for union employees for this contract? If so, please provide a copy of the union agreement and seniority list.

Answer: There is no collective bargaining agreement.

90. Question: Service Contract Act requirements, has a Wage Determination been issued for this contract under the Service Contract Act? If so, could it be provided to bidders?

Answer: Higher wages are encouraged to motivate Custodial staff retention.

91. Question: Please confirm daily tasks regarding cleaning of windows, window sills, and glass cleaning are for areas that are under 8feet

Answer: Refer to Question/Answer Section, Item #13.

92. Question: Is the vendor able to submit invoices on a monthly basis for services rendered?

Answer: Yes.

a. If so, is the annual price divided by 12 for monthly billing purposes?

Answer: Yes, please submit monthly invoices for previous month.

93. Question: Other than any day porter requirements, is this a clean and go contract?

Answer: Responsibilities listed for each building in Section 4.3 of the RFP Document.

94. Question: How many full-time employees and part time employees are working on this contract?

Answer: Staffing status responsibility of incumbent. Previous awarded contract is public information should detail be desired.

95. Question: SECTION II. PRICING PROPOSAL FORM - Is this a firm fixed price for the services in the RFP? What price is anticipated in standard janitorial services column? (a monthly or annual price per location)

Answer: Pricing proposal is to be listed per building (SECTION II). Pricing for any services above base contract is listed in SECTION V.

96. Question: SECTION V. HOURLY SERVICES & CONTRACT FLOOR WORK FORM, hourly services, what pricing is anticipated here? Are these for additional services outside the scope of services laid out in the RFP? (Over and above - meaning added at the direction/request Union County at an additional cost)

Answer: Refer to Question/Answer Section, item #3.

97. Question: Is there any ESD Flooring (Electrostatic Discharge) included in the SOW?

Answer: No.

98. Question: Please specify or confirm if the following floor types are included in the SOW to be cleaned/maintained under this contract; Terraza, granite, marble, hard wood floors, (Historic Courthouse)

Answer: Unknown amounts of different types of flooring.

99. Question: If any of the above flooring (Q20) is included in the SOW, please provide location, type and estimated square footage.

Answer: Unknown amounts of different types of flooring.

100. Question: Are there any Judges Chambers or Executive Offices requiring special attention? Please confirm that requirement

Answer: No.

101. Question: Please confirm that Union County is providing the walk off mats

Answer: Entry mats are provided and serviced by another contract outside of this RFP. Vacuuming and/or daily cleaning only.

- a. If the contractor is expected to provide walk off mats, please provide, sizes and quantities needed.

102. Question: In certain areas the square footage (net cleanable) for the janitorial SOW is limited to a small portions of the building. Regarding the window washing services, please confirm each building address will require all exterior and interior windows in the complete building are SOW included in the window washing of the contract?

Answer: Refer to Question/Answer Section, Item #13.

- a. If not, please clarify (specify) by location the windows, floors, areas that are included for the window cleaning

Answer: Refer to Question/Answer Section, Item #13.

- 103.** Question: 4.1.15 Exterior windows is mentioned for monthly cleaning schedule, however, the SOW under K cleaning of exterior and interior of window glass is scheduled for twice a year. P 49 Section M - wash all windows outside perimeter 2x's year please clarify the requirement for windows.

Answer:

- a. In areas that are excluded from the janitorial sow please clarify the requirement for exterior windows, interior windows, windowsills.

Answer: Unless there is an item on glass that specifically needs attention, All glass interior and exterior at all buildings regardless of height is part of the required scope of work at 2x/year.

- 104.** Question: Page 48 of the RFP references Project WORK, section M, are these tasks at the described frequencies included in the annual price?

Answer: These are the expected tasks listed for buildings noted in Section 4.3 of the RFP Document.

- 105.** Question: Are there dumpsters at every location or are they shared at some locations? If they are shared, please specify which buildings share dumpsters.

Answer: All locations have dumpsters.

- 106.** Question: Is there a central location for trash to be deposited or brought to by the vendor?

Answer: No. Some items by the driver may be requested to be deposited at a certain location.

- 107.** Question: Is there a central location for all recyclables to be deposited or is there a collection at each location?

Answer: No. Some items by the driver may be requested to be deposited at a certain location.

- 108.** Question: Page 16 G. High Dusting - Does this include the cathedrallike ceilings and walls in the Main Library, LOIS MORGAN EDWARDS MEMORIAL LIBRARY, UNION WEST LIBRARY, SOUTHWEST REGIONAL LIBRARY

Answer: Yes.

109. Question: Are the grounds under the awning of the Farmer Market part of the SOW exterior cleaning and policing?

Answer: Only trash pickup outside under the awning.

110. Question: Page 9, T. Work order system used to assign work orders. Work orders are to be closed by the supervisor as work is performed. Page 15, 4.1.28 FAMIS Work Order System - The County will require the Contractor's supervisor to utilize the FAMIS work order system where janitorial work orders will be assigned on an as needed basis. Does Union County provide computer access to FAMIS and for printing work orders?

Answer: No. Only access to FAMIS work order system will be provided. It can be accessed via a mobile application and notifications by email.

111. Question: Based on the site visit it appears that many of the areas are not conducive to open area robotic cleaning, was there a specific building or areas that you have in mind that you see the need for robotic cleaning?

Answer: Health and Human Services, Government Center, and Libraries are most conducive for robotic cleaning.

a. Do you have adequate power setups to charge multiple units?

Answer: Yes.

b. Do you have storage for multiple units? Yes, but does require staff to store and start units.

112. Question: Am I able to stop in and measure some areas of a few of the buildings we visited last week?

Answer: You are free to visit the buildings that are currently open to the public.

113. Question: Library restrooms and get a count of restrooms at the buildings?

Answer:

114. Question: Farmers' Market

a. Do the visitors at the farmers market utilize the restrooms or supplies?

Answer: Yes.

b. How do we monitor that?

Answer: Nightly in Section 4.3 of the RFP Document.

c. What is the approximate monthly supply usage at this site?

Answer: Refer to Add/Delete/Replace Section, Item #2

115. Question: Southwest Regional Library.

a. It keeps referring to a “Waxhaw Library” Is this the Southwest Regional Library? It has a Waxhaw address. There is no sqftg or address info for a “Waxhaw Library” that I see.

Answer: Refer to Add/Delete/Replace Section, Item #1.

b. I know there is a multi-site porter 1 day at Marshville and 1 day at Southwest and 3 days at Union West...it’s saying this person is shared at Waxhaw Library under Union West notes.

Answer: The porter is shared between those locations. (Southwest Regional Union West)

116. Question: Appx Supply monthly usage at Government Center and Human Services?

a. # of TP cases / # of Paper Towel Cases / # of Toilet Seat Covers / # of Soap Cases / # of Hand Sanitizer Cases / Trash Bags. How many different sizes of trash bags and how many cases of each are used monthly?

Answer: Typical type 10 gallon liners for desk trash receptacles, 20 gallon liners for tall central office printer areas, 32 gallon larger trash in busy or outside areas may require larger. Usage is unknown and is the responsibility of the incumbent.

117. Question: What other supplies will we be responsible for?

Answer: Sanitary napkin liners.

118. Question: Is there a specific list for each building? Appx Usage for each building

Answer: Usage is unknown and is the responsibility of the incumbent.

119. Question: Box Truck / Driver:

a. Is this needed and if yes, where, when, and the hours? Driver specs?

Answer: The box truck is listed as a Contractor Furnished material in 4.6.2. and SECTION IV. DRIVER/GENERAL LABORER FORM lists the job description and specs.

120. Question: Current Contract: Amount: \$ and does it include all of the following buildings? + or –

Answer: The contract price amount requested is to include all buildings listed in the RFP.

Refer to Question/Answer Section, Item #8.

121. Question: Are there any additional special requirements or needs; not listed in the RFP, that we should include?

Answer: No

122. Question: Are there any special background requirements needed for any of these locations or the cleaners?

Answer: Unknown.

123. Question: Are these buildings broken up into any specific grouping for contract disbursement or invoicing? Or are they all quoted / invoiced separately?

Answer: All buildings should be quoted together for invoicing.

124. Question: Regarding supplies, will there be an opportunity to reconcile supplies each quarter?

Answer: The contractor shall provide all labor, supplies, supervision, tools, materials, equipment, and transportation necessary to provide janitorial and day porter services in accordance with the referenced specifications.

125. Question: Will there be a short list involved with this RFP since there were so many companies involved in the process?

Answer: Selection process and evaluation details are listed in 5.3 and 5.4 of the RFP.

126. Question: How many toilet paper, soap, sanitizer, and paper towel dispensers are there in each building listed in this RFP?

Answer:

Unknown.

Refer to Add/Delete/Replace Section, Item #2.

127. Question:

Building	Questions
Government Building	How many employees? How many visitors avg monthly? (Needed for supply) How many restrooms and fixtures total? Any events? Appx Supply cost monthly?
Historic Courthouse	How many employees? How many visitors? Avg Event size? How many (avg) events per month? and do these events occur on nights we normally clean? Food and Beverage involved? How many restrooms and fixtures total?
Historic Post Office	How many employees? How many restrooms?

UCPS Admin	How many employees? How many visitors monthly or annual AVG? How many restrooms and fixtures total? How many Events per month? Avg event size? Food and Beverage involved? DO these occur on normal cleaning days or is this a special trip outside of normal? cleaning days
Juvenile Probation	How many employees? How many visitors? Any events at this location? Total Restroom and fixtures count?
Lois Morgan Edwards Library	How many employees? How many avg visitors a day / per month? Any events for children at this location? How many, if yes?
Farmers Market	How many employees? Weekend Farmers market- any event cleaning? Grounds trash pickup – Monday after market days? Any weekend work?
Patton Buildings	Total Restroom and fixtures count at each site? Appx supply usage per bldg. per month?
Adult Probation	How many employees? How many visitors? Any events at this location? Total Restroom and fixtures count?
Human Services	How many employees? How many visitors avg monthly? (Needed for supply) How many restrooms and fixtures total? Any events? Appx monthly supply cost?
Yadkin WTP	How many employees? How many visitors avg monthly? (Needed for supply) How many restrooms and fixtures total? Any events?
Progress Building	How many employees? How many visitors avg monthly? Appx monthly supply cost?
UC Water Operations	How many employees? How many visitors avg monthly? Appx monthly supply cost?
Union West Library	How many employees? How many visitors avg monthly? Appx monthly supply cost?
Southwest Regional Library	How many employees? How many visitors avg monthly? Appx monthly supply cost? Special Events?

Answer: Refer to Question/Answer Section, Item #2 for number of restrooms. Supply usage and cost is unknown and is the responsibility of the incumbent. Events at Historic Courthouse, UCPS Admin, and Libraries are infrequent and schedule unknown. Attached Visitor Information and Employees per Building

Attached:

Appendix C Chart II. Estimated Quantity of Cleanable Rooms & Restrooms

Appendix C Chart III. Estimated Visitors Per Month & Estimated Number of Employees Per Building

End of Addendum No. 2

II. ESTIMATED QUANTITY OF CLEANABLE ROOMS & RESTROOMS

RFP 2025-056 UNION COUNTY JANITORIAL SERVICES		
Estimated Facility Cleanable Rooms & Restrooms		
<i><u>The number of rooms and restrooms listed below are estimates and may increase or decrease during the contract period</u></i>		
FACILITY	ROOMS (estimated)	RESTROOMS (estimated)
ADULT PROBATION	40	11
FARMERS MARKET	12	3
GOVERNMENT CENTER	196	36
HISTORIC COURTHOUSE	34	5
HISTORIC POST OFFICE	50	13
HUMAN SERVICES	200	34
JUVENILE PROBATION	15	2
LOIS MORGAN EDWARDS MEMORIAL LIBRARY		3
MAIN LIBRARY/BOARD OF ELECTIONS	50	6
MARSHVILLE LIBRARY (LOIS MORGAN EDWARDS)	13	3
PATTON AVE COMPLEX	18	4
PROGRESS BUILDING	32	5
SOUTHWEST REGIONAL LIBRARY	28	4
UNION WEST LIBRARY	12	4
UCPS ADMINISTRATION	102	5
PATTON AVE. COUNTY GARAGE OFFICES	19	3
• PATTON AVE. RADIO SHOP	2	1
• PATTON AVE. TIRE SHOP	1	1
UC WATER OPERATIONS CENTER ADMINISTRATION	22	4
• UC WATER OPERATIONS WAREHOUSE OFFICE	1	1
• UC WATER OPERATIONS SHOP	1	1
• UC WATER OPERATIONS EQUIPMENT BUILDING	1	1
12 MILE CREEK WRF	11	4
CROOKED CREEK WRF	5	2
RAW WATER INTAKE	4	2

YADKIN WATER TRATMENT PLANT	5	2
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III. Estimated Visitors Per Month & Estimated Number of Employees Per Building
RFP 2025 -056 UNION COUNTY JANITORIAL SERVICES

Estimated Visitors Per Month & Estimated Number of Employees Per Building		
<i>The number of visitors and employees listed below are estimates and may increase or decrease during the contract period</i>		
Facility	Estimated Average Number of Visitors Per Month	Estimated Number of Employees Per Building
Adult Probation	1,000	44
Farmers Market	0	5
Government Center	5,770	267
Historic Courthouse	10	6
Historic Post Office	175	40
Human Services	6,500	432
Juvenile Probation	250	30
Lois Morgan Edwards Memorial Library	3,539	8
Main Library/Board of Elections	10,717	57
Progress Building	45	86
Southwest Regional Library	10,944	30
Union West Library	9,471	18
UCPS Administration	400	40
Patton Avenue Complex	400	15
UC Water Operations Center	30	83
12 Mile Creek WRF	0	12
Crooked Creek WRF	0	3
Raw Water Intake	0	4
Yadkin WTP	0	8



Union County, NC

Staff Report

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

File #: 25-607

Agenda Date: 10/6/2025

TITLE:

Contract Amendment - Landscaping Services

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

- 1) November 1, 2021, Regular Meeting, Agenda Item #21-346, Approved initial contract
- 2) June 6, 2022, Regular Meeting, Agenda Item #22-318, Approved amendment to add Emergency Services and Sheriff's Office
- 3) November 1, 2024, Regular Meeting, Agenda Item #24-593, Approved one-year contract renewal

BACKGROUND:

The Facilities & Fleet Management department has utilized the contractual services of Lawrence Companies, LLC D/B/A Providence Landscape Group for landscape services since November 1, 2021. The company has been effective and efficient in meeting our service needs, and we are requesting to continue this service for an additional one year and adding the Union County Cemetery on Cresthaven Drive, Monroe, NC to the service locations.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$494,495.00 and is budgeted accordingly for FY26.

STATE OF NORTH CAROLINA

AMENDMENT #9

COUNTY OF UNION

This Amendment, made and entered into as of _____, by and between UNION COUNTY, a political subdivision of the State of North Carolina, hereinafter referred to as “Union,” and LAWRENCE COMPANIES, LLC D/B/A PROVIDENCE LANDSCAPE GROUP, hereinafter referred to as “Contractor,” shall modify as indicated that agreement between the parties dated October 8, 2021, as modified by amendments dated June 9, 2022, August 29, 2022, December 1, 2023, December 15, 2023, June 4, 2024, September 10, 2024, May 30, 2025, and June 13, 2025, hereinafter referred to as the “Agreement.”

WITNESSETH:

WHEREAS, the parties entered into an agreement pursuant to which Contractor provides certain landscaping services at specified Union facilities (the “Landscape Services”); and

WHEREAS, Union now desires to exercise its option to renew the Agreement, and to add additional services to the scope of the Agreement; and

WHEREAS, Contractor is willing to provide the Landscape Services, including the additional services, during the renewal term.

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

1. In addition to the Landscape Services listed in the Agreement, Contractor agrees to provide quarterly maintenance services at the cemetery located at 0 Cresthaven Drive, Monroe, NC (Union County, NC Parcel No. 09351207), beginning August 1, 2025 (the “Cemetery Landscape Services”).
2. Union agrees to pay Contractor for the Cemetery Landscape Services at the rates reflected on the attached Exhibit A, which is incorporated herein by reference. The fees for the Cemetery Landscape Services are in addition to the fees already paid pursuant to the Agreement.
3. Contractor and Union agree to renew the Agreement for one (1) year, beginning November 1, 2025, and ending October 31, 2026 (the “Second Renewal Term”).
4. Each signatory below warrants that it has the corporate or other organizational power and authority to execute, deliver and perform this Amendment. Each signatory further warrants that the execution, delivery and performance by it of this Amendment and the Agreement has been duly authorized and approved by all requisite action of the party’s management and appropriate governing body.
5. Except as herein amended, the terms and provisions of the Agreement shall remain in full force and effect.

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

UNION COUNTY

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

LAWRENCE COMPANIES, LLC D/B/A
PROVIDENCE LANDSCAPE GROUP

By: _____ (SEAL)

Approved as to Legal Form RLM

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

Deputy Finance Officer



PROPOSAL

268304

1017 Technology Dr | Indian Trail, NC 28079
Office: 704-586-0201

Customer	Location
UC-Government Buildings 500 N. Main Street Suite #500 Monroe, NC 28112	UC-Government Buildings 500 N. Main St Monroe, NC 28110
Description	

Cemetery maintenance

To be completed quarterly (4 times per year)

Billed upon completion after each service

In wooded cemetery lot adjacent to 506 Cresthaven Dr., Monroe, NC 28110

Cut down sucker regrowth from trees

Cut down weedy vegetation

Treat cut vegetation and sucker growth with non-selective herbicide to discourage regrowth

*Care will be taken to avoid disturbing stone markers as much as possible and clearing work will be done by hand

Item	Total Price
Quarterly Cemetery maintenance	\$1,650.00
Subtotal	\$6,600.00
Tax	\$0.00
Total	\$6,600.00

Customer _____ Date _____ Contractor _____ Date _____

~~Terms and Conditions~~

~~INT~~ _____



Union County, NC

Staff Report

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

File #: 25-610

Agenda Date: 10/6/2025

TITLE:

Contract Renewal - Managed Print Services

INFORMATION CONTACT:

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

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:

September 19, 2022, Regular Meeting, Agenda Item #22-648 - Approved initial agreement

BACKGROUND:

The Information Technology Department has utilized the contractual services of Sharp Leasing USA Corporation for Managed Print Services since October 2022. The company has been effective and efficient in meeting our service needs, and we are requesting to continue this service for an additional twenty-four months.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$235,749. Since this contract renewal contains a two-year term, a total of \$471,498 is anticipated to be spent. Funding is available in the adopted FY26 budget with future expenditures subject to annual BOCC budget appropriation.

Sharp Leasing USA Corp.
Schedule to Master Lease Agreement (Municipal)



Customer Name: UNION, COUNTY OF	Master Lease Agreement Number: Master Lease Agreement Date: 9/30/2022 Lease Order No.:
Name of Supplier: Sharp Electronics Corporation	Schedule Number:

This schedule (this "Schedule") is made and entered into by and between **Sharp Leasing USA Corp.** (hereinafter "We," "Us" or "Our") and the customer named above (hereinafter "You" or "Your"). This Schedule is entered into subject to the master agreement referenced above (the "Master Agreement") between You and Us. All of the terms and conditions set forth in the Master Agreement are hereby reaffirmed and incorporated in and made part of this Schedule, as if fully set forth herein. The Master Agreement, together with this Schedule and the related and supporting documents entered into in connection with this Schedule, represent the final and only agreement between You and Us regarding the subject matter herein and the equipment identified below (the "Equipment") and may not be contradicted by evidence of prior, contemporaneous or subsequent oral agreements. This Schedule may not be changed except by way of a written agreement between You and Us. Other agreements (including, without limitation, those contained in any purchase agreement or other agreement between You and Sharp Electronics Corporation) not stated in the Master Agreement or in this Schedule are not binding on Us. This Schedule, inclusive of the terms and conditions set forth in the Master Agreement, constitutes a separate Lease between You and Us. Any amendment to the Master Agreement subsequent to the date of this Schedule shall be ineffective as to this Schedule unless otherwise expressly stated in such amendment. This Schedule may not be modified except in a writing signed by You and Us.

1. This Schedule applies to the following-described Equipment:

EQUIPMENT DESCRIPTION:

Qty	Model No.	Description	Monthly Equipment Payment (A)	Monthly Service Payment (B)	Monthly Payment (A+B)	Copy Type (B&W Color)	Monthly Copy Allowance (each)	Overage Copy Charge
56	BP70C31							
47	BP70C45							
7	BP70C55							
1	BP70C65							
TOTAL:								
\$19,645.68								
___ SERVICE INCLUDING SUPPLIES								

PAYMENTS ARE EXCLUSIVE OF TAX FOR ADDITIONAL UNITS, SEE SCHEDULE A ATTACHED.

- Equipment Location if different from Customer address set forth in Master Agreement: _____
 Lessee Contact/Telephone: _____
- Original term of this Schedule: 24__ months
- Payment terms: Payment frequency is "Monthly" unless otherwise noted here: Quarterly Semi-Annual
 Scheduled Meter Reading shall be "Monthly" unless otherwise noted here: Quarterly Semi-Annual
 Overage Copy Charges will be billed when meter reads are taken.
- Advance payment due at the time this Schedule is signed (if any): \$ _____, which shall be applied to the:
 First payment First and last payments Other: _____
- Security Deposit (if any): \$ _____
- Purchase Option at end of original term (applicable only if Schedule is entered into pursuant to a Master Lease Agreement):
 10% x Fair Market Value One Dollar (\$1.00) Other: _____

Applicable only if Schedule is entered into pursuant to a Master Lease Agreement: The above Equipment purchase option (if any is checked) may be exercised by You **only** at the end of the original term of this Schedule. If you are in default under the Master Agreement or this Schedule and/or any other schedule under a Master Agreement at the time you desire to exercise the above-checked purchase option, You must cure such default(s) to Our satisfaction before having the right to exercise such option. If the "One Dollar" purchase option is checked above, then no provision in the Master Agreement relating to automatic renewal of the term of a schedule shall apply to this Schedule. If the "Fair Market Value" option is checked above, then the purchase price will be the fair market value of the Equipment, as determined by Us in our sole but commercially reasonable judgment.

You agree to be bound by the terms of this Schedule, which includes the preprinted terms of the Master Agreement (as amended) and agree this Schedule shall commence on the date of our acceptance. The parties agree that the original hereof for enforcement and perfection purposes, and the sole "record" constituting "chattel paper" under the UCC, is either (a) the paper copy hereof bearing (i) the original or a copy of either your manual signature or an electronically applied indication of your intent to enter into this Schedule, and (ii) our original manual signature or (b) the copy of this Schedule executed by the parties and controlled by us or our assignee or custodian in accordance with the Electronic Signatures in Global and National Commerce Act or any similar state laws based on the Uniform Electronic Transactions Act and other applicable law as electronic chattel paper under the UCC. Upon execution, the parties agree to be bound to the terms hereof regardless of the medium or format in which this Schedule is maintained or controlled. Except as otherwise expressly provided in the Master Agreement under which this Schedule is entered into, the Schedule is non-cancelable and may not be terminated early.

Us: Sharp Leasing USA Corp., 100 Paragon Dr, Montvale, NJ 07645	You: UNION, COUNTY OF
By:	By:
Name (print):	Name (print): Brian W. Matthews
Title:	Title: County Manager



Schedule A, Union County

SHARP BUSINESS SYSTEMS

Union County Name	Union County Location	Machine ID	Model	Serial #	BW Meter	Color Meter
SOIT-01	Indian Trail Patrol Room	99525752	MXC407P	502914803L0MC		
LIBUW-02	UWPL-112	99525755	MXC407P	502920203LXZZ		
LIBUW-03	UWPL-125	99550115	BP70C31	25172286		
LIBUW-04	UWPL-124	99539321	BP70C31	25134765		
LIBUW-01	UWPL-103	99539320	BP70C45	25144025		
SOIT-02	Indian Trail Console	99456333	BP70C45	25132877		
FACIL-02	Facilites	99337908	BP70C45	25133547		
SOGR-01	Gun Range Hallway	99539332	MXC304WH	23014812		
JESSE-01	Parks and Rec	99525753	MXC407P	502920604M4H5		
ESC-911-ADM	ESC-151	99523081	BP70C31	25174786		
#N/A	EOC	99523035	MXC407P	502920203LYOP		
ESC-911-DSP	ESC-151	99523033	MXB476WH	1F02734Y		
ESC-EOC	ESC-111	99523052	BP70C31	25174246		
#N/A	EOC	99523045	MXB427PW	460122410G15K		
HHS-04	HHS - A337	99464622	BP70C45	25143545		
HHS-03	HHS - A337	99464654	BP70C45	25095043		
HHS-02	HHS - A313	99432969	BP70C45	25134287		
DSS-05	DSS - E104	99384826	MXB427PW	460122410G16T		
DSS-11	DSS - E110	99384837	MXB427PW	460122410G16R		
DSS-09	DSS - E108	99384843	MXB427PW	460122410G16F		
DSS-08	DSS - E107	99384851	MXB427PW	460122410G160		
DSS-07	DSS - E106	99384857	MXB427PW	460122410G193		
DSS-10	DSS - E111	99384858	MXB427PW	460122410G18L		
DSS-06	DSS - E105	99384863	MXB427PW	4601105003Y33		
DSS-50	DSS - E304	99384824	MXB427PW	460122410G15G		
DSS-55	DSS - E309	99384825	MXB427PW	460122410G16D		
DSS-54	DSS - E308	99384827	MXB427PW	460122410G15L		
DSS-51	DSS - E305	99384829	MXB427PW	460122410G16M		
DSS-56	DSS - E310	99384833	MXB427PW	460122410G16N		
DSS-52	DSS - E306	99384834	MXB427PW	460122410G170		
DSS-57	DSS - E311	99384839	MXB427PW	460122410G16L		
DSS-53	DSS - E307	99384854	MXB427PW	460122410G15R		
DSS-48	DSS - D315	99416858	BP70C45	25181976		
DSS-49	DSS - D315	99432936	BP70C45	25134217		
DSS-58	DSS - E332	99432940	BP70C45	25133227		
HEA-01	HEA - B214	99464621	BP70C45	25144385		
DSS-18	DSS - A230	99384831	MXB427PW	460122410G163		
DSS-46	DSS - E242	99416861	BP70C45	25133907		
DSS-13	DSS - E135	99416863	BP70C45	25131837		
DSS-20	DSS - A236	99416864	BP70C45	25133977		
DSS-47	DSS - E242	99416867	BP70C45	25135557		
DSS-21	DSS - D218	99432937	BP70C45	25135247		
DSS-14	DSS - E135	99432944	BP70C45	25133277		
DSS-16	DSS - A204	99432946	BP70C45	25132857		
DSS-03	DSS - D105	99464618	BP70C45	25132967		
DSS-02	DSS - D105	99464619	BP70C45	25132997		
DSS-26	DSS - E205	99464660	BP70C45	25144135		
DSS-15	DSS - A203	99456486	BP70C45	25134797		
DSS-19	DSS - A208	99424338	MXC407P	502922304PLTM		
DSS-45	DSS - E233	99465318	MXC304WH	23010051		
HEA-15	HEA - C344	99424337	MXB476WH	1F02933Y		
HEA-13	HEA - C325	99424335	MXC407P	502922304PLVL		
HEA-08	HEA - B323	99384821	MXB427PW	460122410G16P		
HEA-10	HEA - B334	99384822	MXB427PW	460122410G15T		
HEA-14	HEA - C334	99384823	MXB427PW	460122410G16W		
HEA-09	HEA - B326	99384830	MXB427PW	460122410G16K		
DSS-01	DSS - B108	99424334	MXB476WH	1F02697Y		
HEA-06	HEA - B302	99424332	MXC304WH	23014832		
HEA-12	HEA - C309	99416872	BP70C45	25183036		
HEA-03	HEA - B232	99432938	BP70C45	25133877		
HEA-11	HEA - B352	99432939	BP70C45	25134547		

HEA-02	HEA - B232	99432961	BP70C45	25135277		
HEA-07	HEA - B314	99424333	MXB476WH	1F03416Y		
HHS-01	HHS - B102	99432962	BP70C55	25050497		
DSS-12	DSS - E109	99384849	MXB427PW	460122410G15N		
DSS-17	DSS - A223	99432941	BP70C45	25134527		
HEA-05	HEA - C223	99424331	MXC304WH	23014632		
HEA-04	HEA - C203	99464656	BP70C45	25144075		
DSS-22	DSS - D218	99432945	BP70C45	25132807		
FIN-01	GC-714	99464625	BP70C45	25132977		
SOWC-01	Wesley Chapel Patrol Room	99456324	BP70C45	25134147		
LIBMO-01	MPL-246	99539324	BP70C31	25134915		
LIBMO-02	MPL-232	99523064	BP70C31	25173686		
LIBMO-06	MPL-222	99525751	MXC407P	502920203LXW1		
FACIL-01	IT (Spare Printer)	99549479	MXM3071S	23003994		
LIBMO-07	MPL-258	99525745	MXB427PW	4601105003Y2W		
BOE-01	Board of Elections	99539336	BP70C45	25143715		
LIBMO-08	MPL-222	99539328	BP70C31	25160846		
LIBMO-09	MPL-264	99539329	BP70C31	25135595		
LIBMO-05	MPL-218	99539337	BP70C31	25134755		
LIBMO-04	MPL-257	99539323	BP70C31	25133035		
#N/A	Library	100944956	BP70C31	25064948		
LIMBO-06	Cassie Printer MPL-222	97845452	MXC607P	50630530GOWN2		
AG-01	AGC-138	99525750	MXC407P	502920203LY39		
AG-05	AGC-135	99525746	MXB427PW	461105003XYF		
AG-03	AGC-137	99501769	BP70C31	25174806		
AG-02	AGC-125	99501597	BP70C55	25184236		
AG-04	AGC-137	100944958	BP70C65	25083259		
SOAS-03	Sheriffs Office	99479223	MXB476WH	1F02547Y		
SOAS-04	Evidence	99479214	MXB427PW	460122410G15F		
SOAS-02	CSI Director	99479222	MXB427PW	460122410G15X		
SOAS-01	Dispatch/Console	99456319	BP70C31	25174016		
SOMAIN-04	Sheriffs Office	99456320	BP70C31	25174826		
		108453376	MXC428P	5031415030WHN		
SOMAIN-11	Jail Captain Office	99479217	MXC407P	502912703DFN0		
SOJAIL-04	Jail Classification Office	99479218	MXC407P	502912703DFBM		
SOSPARE-01	unused office	99479219	MXC407P	502912703DFDR		
SOMAIN-07	Lt. James Dennis Office	99479224	MXC407P	502912703DFM8		
SOJAIL-06	Jail Transportation	99501541	MXC407P	502914904L5H6		
SOJAIL-03	Inmate Worker Supervision	99501544	MXC407P	502914904L5H1		
SOJAIL-09	Jail Officer's Rm	99456325	MXB557P	406420111P7LV		
SOMAIN-05	unused office	99456327	MXM3071S	23003144		
SOMAIN-06	Sheriffs Office	99456317	MXB476WH	1F03391Y		
CANE-02	Parks and Rec	99424377	MXB427PW	460122410G15C		
SOMAIN-08	Sheriffs Office	99456315	MXB476WH	1F03396Y		
SOJAIL-07	Sheriffs Office	99456322	MXB476WH	1F03395Y		
SOMAIN-13	Sheriffs Office	99424378	MXB427PW	460122410G151		
SOJAIL-10	Sheriffs Office	99424379	MXB427PW	460122410G166		
DSSJC-01	DSS	99424380	MXB427PW	460122410G156		
SOJAIL-08	Sheriffs Office	99456328	BP70C31	25174046		
SOJAIL-05	Health	99456321	BP70C45	25132837		
SOMAIN-02	Sheriffs Office	99456323	BP70C45	25135237		
SOMAIN-01	Sheriffs Office	99456326	BP70C45	25134647		
#N/A	Sheriffs Office	99501545	BP70C55	25187156		
SOJAIL-01	Sheriffs Office	99502085	BP70C55	25184926		
#N/A	Sheriffs Office	99523026	MXB476WH	1F02761Y		
SOADMIN-18	Sheriffs Office	99501525	MXC407P	502920203LXYR		
SOADMIN-24	Sheriffs Office	99501526	MXC407P	502914803L0M8		
SOADMIN-25	Sheriffs Office	99501527	MXC407P	502914803L0ML		
SOADMIN-29	Sheriffs Office	99501528	MXC407P	502914904L5KM		
SOADMIN-30	Sheriffs Office	99501529	MXC407P	502914803L0N3		
SOADMIN-26	Sheriffs Office	99501530	MXC407P	502914803L0N7		
SOADMIN-27	Sheriffs Office	99501531	MXC407P	502914803L0MW		
SOADMIN-32	Sheriffs Office	99501533	MXC407P	502914904L5HT		
SOADMIN-35	Sheriffs Office	99501535	MXC407P	502914904L5G0		
SOADMIN-17	Sheriffs Office	99501536	MXC407P	502914904L5G5		
SOADMIN-34	Sheriffs Office	99501537	MXC407P	502914904L5HY		
SOADMIN-23	Sheriffs Office	99501538	MXC407P	502920203LY3R		
SOADMIN-31	Sheriffs Office	99479862	MXB427PW	460122410G164		

SOADMIN-06	Sheriffs Office	99501182	MXB427PW	460122410G180		
SOADMIN-05	Sheriffs Office	99501261	MXB427PW	4601105003Y2N		
SOADMIN-02	Sheriffs Office	99501262	MXB427PW	4601105003Y38		
SOADMIN-12	Sheriffs Office	99501263	MXB427PW	460122410G158		
SOADMIN-10	Sheriffs Office	99501264	MXB427PW	4601105003XY7		
SOADMIN-15	Sheriffs Office	99501265	MXB427PW	460122410G154		
SOADMIN-33	Sheriffs Office	99501267	MXB427PW	460122410G152		
SOADMIN-11	Sheriffs Office	99501505	MXB427PW	460122410G19R		
SOADMIN-21	Sheriffs Office	99501507	MXB427PW	460122410G15H		
SOADMIN-22	Sheriffs Office	99526864	MXB427PW	4601105003Y2H		
SOADMIN-03	Sheriffs Office	99501610	BP70C31	25170516		
SOADMIN-04	Sheriffs Office	99501611	BP70C31	25173606		
SOADMIN-08	Sheriffs Office	99501612	BP70C31	25175026		
SOADMIN-09	Sheriffs Office	99501613	BP70C31	25173776		
SOADMIN-13	Sheriffs Office	99501614	BP70C31	25174816		
SOADMIN-14	Sheriffs Office	99501615	BP70C31	25174376		
SOADMIN-19	Sheriffs Office	99501617	BP70C31	25174596		
SOADMIN-20	Sheriffs Office	99501618	BP70C31	25174396		
SOADMIN-16	Sheriffs Office	99501594	MXM5071S	25016355		
SOADMIN-28	Sheriffs Office	99501599	BP70C55	25187136		
SOADMIN-01	Sheriffs Office	99501768	BP70C55	25187866		
SOJC-04	Judical-4096	99522192	MXB476WH	1F02766Y		
SOJC-02	Judical-1029	99501602	BP70C31	25174406		
SOJC-01	Judical-0028	99501603	BP70C31	25175066		
PWCC-01	Public Works	99539327	BP70C31	25134895		
FACIL-03	Facilites	99372410	MXC407P	502912703DFHY		
SOJC-03	Judical-2079	99384884	MXB476WH	1F03444Y		
VETSVCS-01	Old Post Office	99371279	BP70C31	25174906		
TAXCOL-04	Tax Collections	99424151	MXB427PW	460121910FNHH		
CENADMIN-01	GC-918	99337912	BP70C45	25132907		
TAXCOL-07	GC-157	99337914	BP70C45	25134837		
TAXASST-04	GC-222	99371272	BP70C45	25132367		
TAXASST-05	GC-222	99372813	MXC407P	502912703DFN7		
TAXASST-03	GC-220	99384881	MXB476WH	1F03418Y		
TAXASST-06	GC-228	99384882	MXB476WH	1F03415Y		
#N/A	Tax Assessment	100994478	MXC304WH	23017298		
FIN-05	GC-809	99337920	BP70C45	25132287		
BCODE-03	BCODE - 037	99372818	MXB427PW	4601102003HFFH		
BCODE-04	BCODE - 028	99372821	MXB427PW	4601105003Y32		
BCODE-01	BCODE - 020	99372823	MXB427PW	4601105003Y35		
CENADMIN-02	GC-913	99424336	MXC304WH	1301265X		
TAXASST-02	GC-217A	99337896	BP70C31	25129595		
ENVHEA-01	ENVHEA - 031A	99384905	MXC304WH	23010071		
#N/A	IT (Spare Printer)	99384883	MXB476WH	1F03445Y		
INNOV-02	GC-524	99372822	MXB427PW	4601105003Y34		
FACIL-05	FACIL - 056	99384878	MXC304WH	23009361		
FIN-03	GC-715	99424025	MXB427PW	460121910FNG1		
BCODE-EH-01	BCODE -047	99337910	BP70C45	25133637		
LEGAL-02	GC-927	99372851	MXC407P	502912703DFMP		
LEGAL-01	GC-924	99371288	BP70C45	25132597		
HR-01	HR -142	99337911	BP70C45	25132847		
TAXCOL-08	GC -170	99337909	BP70C45	25134667		
PLAN-01	PLAN - 065	99337901	BP70C31	25133275		
FIN-02	GC-710	99337907	BP70C45	25135197		
FACIL-04	FACIL - 053	99372819	MXB427PW	4601102003HF6		
ROD-04	GC-239	99424004	MXB427PW	460122410G165		
TAXCOL-06	GC-107	99372811	MXC407P	502912703DFMT		
TAXCOL-03	Tax Collections	99372815	MXB427PW	4601102003HBF		
TAXCOL-09	Tax Collections	99372812	MXC407P	502912703DFMK		
TAXCOL-01	Tax Collections	99372820	MXB427PW	4601105003Y3C		
TAXCOL-02	Tax Collections	99423900	MXB427PW	460122410G19X		
PWGC-04	GC-414	99373250	MXM4071S	25013405		
PWGC-06	GC-522	99337895	BP70C31	25129735		
LIBMAR-03	Library	99525749	MXC407P	502920203LXYH		
LIBMAR-02	Library	99539318	MXB476WH	1F02724Y		
LIBMAR-01	MARPL-128	99539330	BP70C31	25134275		
#N/A	Library	100944957	BP70C31	25038410		
PWOPS-02	Public Works	99416597	BP70C31	25174196		

PWOPS-01	Public Works	99416400	BP70C31	25173966		
Taxcol-05	GC-229	99464973	MXC407P	502912703DFMX		
TAXASST-01	Tax Assessment	99372408	MXC407P	502922304PLVC		
BCODE-02	BCODE - 027	99372814	MXC407P	502912703DFN2		
PWOPS-03	Public Works	99425087	MXC304WH	23014602		
PWGC-08	GC-625	99337902	BP70C31	25129725		
TBD	SPARE	99384906	MXB476WH	1F03442Y		
ENVHEA-02	ENVHEA - 032	99384904	MXC304WH	23010041		
GC-911-DSP	911 Communications -GroundFl	99337894	BP70C31	25133175		
PWGC-05	GC-412	99337887	BP70C31	25136625		
TAXCOL-10	GC-165	99337915	BP70C45	25133197		
PWGC-07	GC-614	99337888	BP70C31	25129625		
ENVHEA-03	ENVHEA - 047	99372816	MXB427PW	4601102003HBX		
ENVHEA-04	ENVHEA - 029	99372824	MXB427PW	4601105003Y30		
ESC-FM-01	ESC-121	99337890	BP70C31	25133265		
INFOTECH-01	GC-814	99337889	BP70C31	25133255		
PUBCOMM-01	GC-718	99337921	BP70C31	25136145		
PWGC-01	GC-408	99337892	BP70C31	25129565		
ROD-02	GC-244	99384907	MXB707P	406420111P7TP		
ROD-01	GC-241	99373145	MXM3071S	23005454		
ROD-05	GC-244	99373146	MXM3071S	23003274		
ROD-03	GC-253	99373251	MXM3071S	23005884		
TAXASST-08	GC-233	99337891	BP70C31	25129475		
TAXASST-09	GC-235	98381894	BP70C45	25094573		
LIBWAX-01	#N/A	99539317	MXB476WH	1F02757Y		
LIBWAX-02	Library	99539326	BP70C31	25135395		
#N/A	Library	100944934	BP70C31	25073258		
CANE-05	Parks and Rec	99525747	MXC407P	502920604M4H0		
CANE-04	Parks and Rec	99539316	MXB476WH	1F02719Y		
CANE-01	Parks and Rec	99540776	BP70C45	25144105		
GARAGE-01	Garage	99479216	MXC407P	502912703DFN1		
GARAGE-02	Garage	99479215	MXB476WH	1F02768Y		
TRANSP-01	Transportation	99371273	BP70C55	25050937		
FACIL-08	Facilites	99384879	MXC304WH	23010001		
PWTM-01	Public Works	99539325	BP70C31	25134675		
#N/A	Water Department	104573879	BP70C31	33013538		
#N/A	Library	106341470	BP70C31	43016551		
#N/A	Library	106341471	BP70C31	3300417Y		
#N/A	Library	106341472	BP70C31	3300413Y		
#N/A	Library	106341468	BP70C31	43013221		
#N/A	#N/A	107097910	MXC528P	50303102106L8		
#N/A	#N/A	107384353	MXC528P	5030414511GWL		
#N/A	#N/A	107384354	MXC528P	5030414511GWL		
Judicial Center	Drug Rehab		BP-C535WD			
Cane Creek Campstore			BP70C31			
Solid Waste			BP70C31			
SPRAC			BP70C31			
Security & Risk	3rd Floor		BP70C31			
Security & Risk	Ground Floor		BP70C31			
Attorney's office	1st Floor		BP70C45			

Name: Brian W Matthews

Signature: _____

Title: County Manager

Date: _____

CUSTOMER CARE MAINTENANCE AGREEMENT

ACCOUNT ID#

SALES REP:
Joe Grooms

ACCOUNT ID#

START DATE:

CUSTOMER BILL TO INFORMATION			
COMPANY NAME UNION COUNTY			
ADDRESS 500 NORTH MAIN ST			
CITY MONROE	STATE NC	ZIP CODE 28112	
BILLING CONTACT Christopher Liersaph <christopher.liersaph@unioncountync.gov>			
PHONE 704-283-3500			
POOL CONTRACT NUMBER		GROUP IDENTIFIER	
AUTHORIZING CONTRACT NUMBER (GSA/SOURCEWELL/STATE, ETC.)			
PURCHASE ORDER NUMBER			

CUSTOMER LOCATION			
COMPANY NAME UNION COUNTY			
ADDRESS MULTIPLE LOCATIONS			
CITY MONROE	STATE NC	ZIP CODE 28112	
SERVICE CONTACT Christopher Mumpower		PHONE 704-283-3500	
EMAIL ADDRESS christopher.mumpower@unioncountync.gov			
METER CONTACT Christopher Mumpower		PHONE 704-283-3500	
EMAIL ADDRESS christopher.mumpower@unioncountync.gov			
MICAS CONTACT Christopher Mumpower		PHONE 704-283-3500	
EMAIL ADDRESS christopher.mumpower@unioncountync.gov			

SUMMARY				
TERM:	BASE CHARGE TOTAL	SMART RATE	PRINT SECURITY	CONSOLIDATE SBS BILLING?
24	Monthly	\$0.00		

AGREEMENT ENTITLEMENT					
Labor	Parts	Drums	B Toner	C Toner	Staples
Yes	Yes	Yes	Yes	Yes	NO

DETAIL OF CHARGES								
POOL BILLING	Base Charge Included in Lease	CATEGORY	BASE CHARGE SUBTOTALS	FREQUENCY	CATEGORY	INCLUDED IMAGES	FREQUENCY	EXCESS CHARGE
No		BW	\$0.00	Monthly	BW	0	Monthly	0.00650
		COLOR	\$0.00		COLOR	0	Monthly	0.05200
No		BW	\$0.00	Monthly	BW	0	Monthly	
		COLOR	\$0.00		COLOR	0	Monthly	
		BW	\$0.00		BW	0		
		COLOR	\$0.00		COLOR	0		
SBS BILLING	SMART RATE SUBTOTALS			ITEMIZED BY TYPE & QTY	BW		COLOR	
Smart Rate billed by SBS	NETWORKED PRINTERS/DESKTOPS	\$0.00	Monthly, In arrears		NETWORKED PRINTER/DESKTOP	0	\$0.00	0
	LOCAL/SINGLE USER PRINTERS/DESKTOPS	\$0.00		LOCAL/SINGLE USER PRINTER	0	\$0.00	0	\$0.00
				LOCAL/SINGLE USER DESKTOP	0	\$0.00		

COMMENTS / SPECIAL INSTRUCTIONS	
RATES LOCKED FOR 24 MONTHS	

POOL	MODEL	SERIAL #	ID #	BW Start Meter	Color Start Meter	Physical Location
		SEE SCHEDULE A				

AUTHORIZATION	
X	I have read and understand our obligations under the terms and conditions stated herein, and on the reverse side thereof, as the only agreement pertaining to the equipment hereunder. No other agreements apply unless expressly noted on the face of this agreement or in the contracts specified above. I understand all meter counts are based on 8.5 X 11 (minimum) single sided images unless otherwise noted.
	Customer has declined maintenance coverage at this time. The customer understands obtaining maintenance coverage later may incur charges in addition to the normal maintenance charges and has been informed as to the current time and material billing rates.
<p><i>THIS AGREEMENT SHALL NOT BE EFFECTIVE UNLESS SIGNED BY THE CUSTOMER AND SBS CONTRACT MANAGEMENT Maintenance Agreement contracts are non-refundable, non-transferable, and non-cancelable. Price does not include applicable taxes. Sharp Business Systems is a division of Sharp Electronics Corporation.</i></p>	
<p>Sharp Authorization _____ DATE _____</p> <p>Brian W. Matthews</p> <p>AUTHORIZED CUSTOMER PRINTED NAME</p> <p>AUTHORIZED CUSTOMER SIGNATURE _____ DATE _____</p>	

**CUSTOMER CARE MAINTENANCE AGREEMENT
EQUIPMENT COVERED CONTINUED**

POOL	MODEL	SERIAL #	ID #	BW Start Meter	Color Start Meter	Physical Location

**NON-APPROPRIATION AGREEMENT AND ACKNOWLEDGEMENT
(Applicable to Governmental Entities Only)**

This Non-Appropriation Agreement and Acknowledgement ("Acknowledgement") relates to that certain agreement between Union, County of ("Governmental Entity") and Commercial NC - SLUSA ("Company"), which agreement is identified in Company's records as agreement number 3175508 ("Agreement"). All capitalized terms used in this Acknowledgement which are not defined herein shall have the meanings given to such terms in the Agreement. The undersigned, an authorized representative of Governmental Entity, hereby acknowledges and agrees as follows:

- As of the date of the Agreement: (a) the individual who executed the Agreement had full power and authority to execute the Agreement on Governmental Entity's behalf; (b) all required procedures necessary to make the Agreement a legal and binding obligation against it were followed; (c) the Equipment will be operated and controlled by Governmental Entity and will be used for essential government purposes for the entire term of the Agreement; (d) that all payments due and payable for the current fiscal year are within the current budget and are within an available, unexhausted, and unencumbered appropriation; (e) Governmental Entity intends to pay all amounts payable under the terms of the Agreement when due, if funds are legally available to do so; (f) Governmental Entity's obligations to remit amounts under the Agreement constitute a current expense and not a debt under applicable state law; (g) no provision of the Agreement constitutes a pledge of its tax or general revenues; and (h) Governmental Entity will comply with any applicable information reporting requirements of the tax code, which may include 8038-G or 8038-GC Information Returns.
- If Governmental Entity exercises its right under applicable law to return the Equipment and terminate the Agreement on the last day of the fiscal period for which funds were available (without penalty or additional expense (other than the expense of returning the Equipment to the location designated by Company)), Governmental Entity's Chief Executive Officer (or Legal Counsel) will deliver a certificate (or opinion) to Company at least thirty (30) days prior to the start of the fiscal period for which funds were not appropriated, certifying that (a) Governmental Entity is a state or a fully constituted political subdivision or agency of the state in which it is located; (b) funds have not been appropriated for the applicable fiscal period to pay amounts due under the Agreement; (c) such non-appropriation did not result from any act or failure to act by Governmental Entity; and (d) Governmental Entity has exhausted all funds legally available for the payment of amounts due under the Agreement. This paragraph only applies if, and to the extent that, state law precludes Governmental Entity from entering into the Agreement if the Agreement is deemed to constitute a multi-year unconditional payment obligation. If and to the extent that the items financed under the Agreement is/are software, the above-referenced certificate shall also include certification that the software is no longer being used by Governmental Entity as of the termination date.
- Company relied on this Acknowledgement as part of the Agreement.

A copy of this Acknowledgement containing Governmental Entity's original or facsimile signature or other indication of its intent to agree to the terms set forth herein shall be enforceable for all purposes.

GOVERNMENTAL ENTITY'S AUTHORIZED SIGNATURE		
(As Stated Above)	X	
SIGNATURE	NAME & TITLE	DATE
	Brian W. Matthews, County Manager	

Sharp Leasing USA Corp.



Master Lease Agreement (Municipal)

Master Lease Number:	Customer's Federal Tax ID#: 56-6000345
Customer Name: COUNTY OF UNION	Customer's Address (principal place of business): 500 NORTH MAIN ST. MONROE, NC 28112
Customer's d/b/a (if any):	Customer's Main Business Phone Number: 704-283-3500

In this Master Lease Agreement, (the "**Master Agreement**"), the words "**You**" and "**Your**" mean the Customer named above. "**We**," "**Us**" and "**Our**" mean Sharp Leasing USA Corporation ("**SLUSA**"). "**Schedule**" means a document, in the form attached hereto as **Exhibit A** or such other form as We may accept in Our sole discretion, to be entered into between You and Us for each individual transaction entered into between You and Us pursuant to this Master Agreement. "**Sharp**" means Sharp Electronics Corporation (either directly or through one of its branch dealers), the supplier of the Equipment to You. **This Master Agreement, each Schedule and the other documents executed or delivered by Us in connection herewith and therewith represent the final and only agreement between You and Us regarding the subject matter herein and therein and shall supersede any other oral or written agreements between You and Us. This Master Agreement can be changed only by a written agreement between You and Us. Other agreements not stated herein (including, without limitation, those contained in any purchase agreement or other agreement between You and Sharp) are not binding on Us.** This Master Agreement and each Schedule may be executed in counterparts, each of which shall be deemed an original, but all of which together shall constitute the same document. You acknowledge that You have received a copy of this Master Agreement and agree that a facsimile or other copy containing Your faxed or copied signature shall be as enforceable as the original executed Master Agreement. You hereby represent that this Master Agreement is legally binding and enforceable against You in accordance with its terms.

1. LEASE OF EQUIPMENT - GENERAL. Each Schedule executed by You (and to be executed by You in the future) represents your agreement to lease from Us the personal property listed therein (together with all existing and future accessories, attachments, replacements, additions and embedded software, the "**Equipment**"), upon the terms stated in such Schedule and this Master Agreement, the terms and conditions of which are incorporated by reference into the Schedule (collectively, a "**Lease**"). Each Schedule, including the terms and conditions incorporated therein by reference, shall be considered a separate and independent Lease. If the Equipment includes any software, You agree that (i) We don't own the software, (ii) You are responsible for entering into any necessary software license agreements with the owners or licensors of such software, (iii) You shall comply with the terms of all such agreements, if any, and (iv) any default by You under any such agreements shall also constitute a default by You under this Master Agreement and the related Schedule. The initial term of each Lease will begin on a date designated by Us after We accept it (the "**Commencement Date**") and will continue for the number of months shown on such Schedule ("**Initial Term**"). You promise to pay to Us the periodic payments shown on each Schedule in accordance with the payment schedule set forth therein, plus all other amounts stated herein and therein. Each Schedule is binding on You as of the date You sign it. After You sign a Schedule, We may (i) insert the Schedule or contract number thereon and any other information missing in such Schedule, and (ii) change the payment amount by not more than 15% due to a change in the Equipment configuration, cost or tax amount, or a payment miscalculation.

2. NON-CANCELABLE TERM; RENEWAL. As used herein, "**Present Term**" means the term presently in effect at any time with respect to a Lease, whether it is the Initial Term or a Renewal Term (as defined below). (a) After the Initial Term Union County, in its sole discretion, shall have the option to renew this Agreement for up to two (2) additional one-year renewal terms by providing written notice to Sharp (each, a "**Renewal Term**"), and (b) the payment amount and other terms of such Lease will continue to apply. If You do notify Us in writing that You intend to return the Equipment at the end of the Present Term, then, promptly upon the expiration of such Present Term, You shall return the Equipment pursuant to Section 13 below. Each Lease is non-cancelable during the Initial Term and any Renewal Term.

3. UNCONDITIONAL OBLIGATIONS. With respect to each Lease, You agree that: (a) We are a separate and independent company from Sharp, the manufacturer and any other vendor (collectively, "**Vendors**"), and the Vendors are NOT Our agents; (b) no statement, representation or warranty by any Vendor is binding on Us, and no Vendor has authority to waive or alter any term of this Master Agreement or any Schedule; (c) You, not We, selected all Equipment and the Vendors based on Your own judgment; (d) Your duty to perform Your obligations under this Master Agreement and each Schedule is unconditional and irrevocable despite any failure of any Equipment, the existence of any law restricting the use of any Equipment, or any other adverse condition; (e) if You are a party to any maintenance, service, supplies or other contract with any Vendor, We are NOT a party thereto, such contract is NOT part of this Master Agreement or any Schedule (even though We may, as a convenience to You and a Vendor, bill and collect monies owed by You to such Vendor), We have no obligations to You under such contract, and no breach by any Vendor will excuse You from performing Your obligations to Us under this Master Agreement or any Schedule; and (f) if the Equipment is unsatisfactory or if any Vendor fails to provide any service or fulfill any other obligation to You, You shall not make any claim against Us and shall continue to perform all of Your obligations to Us.

4. PAYMENTS. The payments due pursuant to each Schedule, plus applicable taxes and other charges provided for herein and in the Schedule, shall be due and payable within 30 days from the receipt of an accurate invoice. The payments due under a Schedule may include additional copy charges at the "Overage Copy Charge" rate specified in the Schedule for copies in excess of the Monthly Copy Allowance provided in the Schedule. You agree that We may increase the "Overage Copy Charge" but not more than once each year during the Initial Term and once each year for any Renewal Term (if any), by an amount not to exceed 10%. You agree to (a) provide Us or Sharp by telephone or facsimile with the actual meter readings whenever You are requested to do so, (b) allow Us or Sharp to attach an automatic meter reading device to the Equipment, which meter reading device You will not remove or alter without approval from Us or Sharp, and/or (c) give Us or Sharp access to the Equipment to obtain meter readings or audit the meter reading device. If We or Sharp request You to provide meter readings and You fail to do so within 7 days of the date of such request, then (i) the number of copies used by You may be estimated by Us or Sharp and We will invoice You accordingly, and (ii) We will adjust the estimated charge for excess copies upon receipt of actual meter readings. Restrictive endorsements on checks will not be binding on Us. All payments received will be applied to past due amounts and to the current amount due in such order as We determine. Any security deposit or estimated future Governmental Charge (as defined in Section 10 below) that You pay with respect to a Lease is non-interest bearing, may be commingled with Our funds, may be applied by Us at any time to past-due amounts, and the unused portion will be returned to You within 90 days after the end of this Lease. If We do not receive a payment in full on or before its due date, You shall pay (i) a fee equal to the greater of 10% of the amount that is late or \$29.00, plus (ii) interest on the part of the payment that is late in the amount of 1.5% per month ("Time-Value Interest") from the due date to the date paid. If any check is dishonored, You shall pay Us a fee of \$20.00. Promptly following Our request, from time to time, You shall furnish Us with current financial statements.

5. INDEMNIFICATION. Indemnification provisions are located in Exhibit A, which is attached hereto and incorporated herein by reference.

THE TERMS OF THIS MASTER AGREEMENT ARE CONTINUED ON THE REVERSE SIDE / NEXT PAGE. DO NOT SIGN THIS CONTRACT BEFORE YOU READ AND UNDERSTAND IT. PLEASE SEEK LEGAL COUNSEL BEFORE SIGNING IF YOU HAVE QUESTIONS.

Customer: By: <input checked="" type="checkbox"/> <u>William M. Watson</u> Print name: William M. Watson Title: County Manager	DocuSigned by: September 22, 2022 Date: ___ / ___ / ___ A84957CDD7DF479...	Accepted by <u>Moonsun Park</u> Acceptance Date: September 30, 2022 (to be filled in by Sharp Leasing USA Corp.)
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Approved as to Legal Form: CJB

This Instrument Has Been Preaudited In The Manner Required By The Local Government Budget And Fiscal Control Act

DocuSigned by:
Elena Lukro
 Deputy Finance Officer

IS". We have not made and we hereby disclaim any and all warranties, express or implied, arising by applicable law or otherwise, including without limitation, the implied warranties of merchantability and fitness for a particular purpose. We hereby transfer to You, **without recourse to Us**, all automatically transferable warranties, if any, made to Us by the Vendor(s) of the Equipment. You agree that each Lease is a "finance lease" under the Uniform Commercial Code (the "**UCC**") unless otherwise expressly stated in the related Schedule or as provided by law. To the extent permitted by law, You hereby waive any and all rights and remedies conferred upon You under UCC Sections 2A-303 and 2A-508 through 522. You may be entitled under Article 2A of the UCC to the promises and warranties (if any) provided to Us by some or all of the Vendor(s) in connection with or as part of the contracts (if any) by which We acquire Equipment from such Vendor(s). You may contact such Vendor(s) for an accurate and complete statement of those promises and warranties (if any), including any disclaimers and limitations of them or of remedies. If it is determined that any Lease is a lease intended as security and/or the related Schedule grants to You a \$1.00 purchase option, then **You hereby grant to Us a security interest in the related Equipment and all proceeds thereof.** You authorize Us to record UCC financing statements to protect Our interests in the Equipment.

7. DELIVERY, LOCATION, OWNERSHIP, USE, MAINTENANCE OF EQUIPMENT. Sharp will install (and, with Our prior consent, remove) the Equipment in accordance with Sharp's service policies. You are responsible for all Equipment maintenance. You shall not remove any Equipment from the Equipment location specified in the related Schedule unless You first get Our permission. You shall give Us access to each Equipment location so that We may inspect the Equipment, and You agree to pay Our costs in connection therewith, whether performed prior to or after the Commencement Date of the related Lease. Unless otherwise stated in the related Schedule or as provided by law, **We will own and have title to all Equipment (excluding any software) during each Lease.** You agree that all Equipment is and shall remain personal property. Without Our prior written consent, You will not permit it to become (i) attached to real property or (ii) subject to any liens or encumbrances. **You represent that all Equipment will be used solely for commercial purposes and not for personal, family or household purposes.** You shall use all Equipment in accordance with all laws, operation manuals, any service contracts and insurance requirements, and shall not make any permanent alterations to it. At Your cost, You shall keep all Equipment in good working order and warrantable condition, ordinary wear and tear excepted ("**Good Condition**").

8. LOSS; DAMAGE; INSURANCE. With respect to each Lease, You shall, at all times during the Initial Term and any Renewal Term, (i) bear the risk of loss and damage to the Equipment and shall continue performing all Your obligations to Us even if it becomes damaged or suffers a loss, (ii) keep the Equipment insured against all commercially reasonable risks of damage and loss ("**Property Insurance**") in an amount equal to \$2,194,440.00, with Us named as sole "loss payee," and (iii) carry public liability insurance covering bodily injury and property damage ("**Liability Insurance**") in an amount equal to \$2,000,000 General Aggregate, \$1,000,000 Each Occurrence, with Us named as "additional insured." You have the choice of satisfying these insurance requirements by providing Us with satisfactory evidence of Property and Liability Insurance ("**Insurance Proof**"), within 30 days of the Commencement Date of such Lease. Such Insurance Proof must provide for at least 30 days prior written notice to Us before it may be cancelled or terminated.

9. ASSIGNMENT. You shall not sell, transfer, assign or otherwise encumber (collectively, "**Transfer**") this Master Agreement or any Schedule, or Transfer or sublease any Equipment, in whole or in part. We may, without notice to You, Transfer Our interests in any Equipment and/or this Master Agreement or any Schedule, in whole or in part, to a third party ("**New Owner**"), and if so, the New Owner will, to the extent of the Transfer, have all of Our rights and benefits but will not have to perform Our obligations (if any). You agree not to assert against the New Owner any claim or defense You may have against Us or any predecessor in interest.

10. TAXES AND OTHER FEES. You are responsible for all taxes (including, without limitation, sales and personal property taxes, and excluding only taxes based on Our income), levies, assessments, license and registration fees and other governmental charges relating to this Master Agreement, each Schedule and/or the related Equipment (collectively "**Governmental Charges**"). You agree to promptly pay Us, on demand, estimated future Governmental Charges. You authorize Us to pay any Governmental Charges as they become due, and You agree to reimburse Us promptly upon demand for the full amount (less any estimated amounts previously paid by You). You agree to pay Us a fee for preparing and filing personal property tax returns, and You agree not to file any personal property tax returns. You also agree to pay Us upon demand (i) for all costs of filing, amending and releasing UCC financing statements, and (ii) a processing fee of \$75.00 (or as otherwise agreed) per Lease to cover Our investigation and other administrative costs in originating such transaction. You also agree to pay Us a fee, in accordance with Our current fee schedule, which may change from time to time, for additional services We may provide to You at Your request. **You agree that the fees set forth in this Master Agreement may include a profit.**

11. SAVINGS CLAUSE. If any amount charged or collected under this Master Agreement or any Lease is greater than the amount allowed by law, including, without limitation, any amount that exceeds applicable usury limits (an "**Excess Amount**"), then (i) any Excess Amount charged but not yet paid will be waived by Us and (ii) any Excess Amount collected will be refunded to You or applied to any other amount then due hereunder.

12. DEFAULT. With respect to each Lease, You will be in default if You (1) fail to pay any amount due within 15 days of the due date, (2) breach or attempt to breach any other term, representation or covenant set forth herein, the related Schedule or in any other agreement between You and Us, (3) die (if You are an individual), go out of business or commence dissolution proceedings, (4) become insolvent, admit Your inability to pay Your debts, make an assignment for the benefit of Your creditors (or enter into a similar arrangement), file (or there is filed against You) a bankruptcy, reorganization or similar proceeding or a proceeding for the appointment of a receiver, trustee or liquidator, or (5) suffer an adverse change in Your financial condition and, as a result thereof or for any other reason, We deem Ourselves insecure. If You default, We may do any or all of the following with respect to any one or more Schedules: (A) cancel the related Lease, (B) require You to return the Equipment pursuant to Section 13 below, (C) take possession of and/or render the Equipment (including any software) unusable, and for such purposes You hereby authorize Us and Our designees to enter Your premises, with or without prior notice or other process of law, (D) require You to pay to Us, on demand, an amount equal to the sum of (i) all payments and other amounts then due and past due, (ii) **all remaining payments for the remainder of the then Present Term thereof** discounted at a rate of 6% per annum, (iii) the residual value of the Equipment estimated by Us at the inception of the Lease (as shown in Our books and records), discounted at a rate of 6% per annum, (iv) Time-Value Interest on the amounts specified in clauses "i", "ii" and "iii" above from the date of demand to the date paid, and (v) all other amounts that may thereafter become due hereunder to the extent that We will be obligated to collect and pay such amounts to a third party (such amounts specified in sub-clauses "i" through "v" referred to below as the "**Balance Due**"), and/or (E) exercise any other remedy available to Us under law. You also agree to reimburse Us on demand for all reasonable expenses of enforcement (including, without limitation, reasonable attorneys' fees and other legal costs) and reasonable expenses of repossessing, holding, preparing for disposition, and disposition ("**Remarketing**") of Equipment, plus Time-Value Interest on the foregoing amounts from the date of demand to the date paid. In the event We are successful in Remarketing the Equipment, We shall give You a credit against the Balance Due in an amount equal to the present value of the proceeds received and to be received from Remarketing minus the above-mentioned costs (the "**Net Proceeds**"). **If the Net Proceeds are less than the Balance Due, You shall be liable for such deficiency.** Any delay or failure to enforce Our rights under a Lease shall not constitute a waiver thereof. If We are holding any money belonging to You at any time during a Lease, You agree We may retain and utilize such money to cure any default by You under any Lease.

13. RETURN OF EQUIPMENT. If You are required to return any Equipment pursuant to the terms hereof, You shall, at Your expense, promptly upon demand, send the Equipment to a location(s) designated by Us. The Equipment must be received in Good Condition (as defined in Section 7). If the Equipment is not received within 15 days of the date of demand, You agree to continue paying the scheduled payments and all other amounts due pursuant to the related Schedule until it is received by Us. You will be responsible for any loss or damage to the Equipment during the return.

14. APPLICABLE LAW; VENUE; JURISDICTION. Each Lease shall be deemed to be performed in Union County, North Carolina (Our principal place of business and where We will administer Your account). **This Lease shall be governed by the laws of the State of North Carolina, but without regard to North Carolina choice-of-law laws. All legal actions relating to this Lease shall be filed and adjudicated exclusively in a state or federal court located in Union County, North Carolina. You hereby agree not to object to such venue, and You consent to personal jurisdiction in such courts.** Each provision hereof shall be interpreted to the maximum extent possible to be enforceable under applicable law. If any provision is construed to be unenforceable, such provision shall be ineffective only to the extent of such unenforceability without invalidating the remainder hereof.

15. NON-APPROPRIATION OF FUNDS. You hereby represent, warrant and covenant unto Us that: (a) You intend, subject only to the provisions of this Section 15, to remit to Us all sums due and to become due under each Lease for the full Present Term; (b) Your governing body has appropriated sufficient funds to pay all payments and other amounts due under each Lease during the first fiscal period applicable thereto; (c) You reasonably believe that legally available funds in an amount sufficient to make all payments for the full Present Term of each Lease can be obtained; and (d) You intend to do all things lawfully within Your power to obtain and maintain funds from which payments may be made, including making provision for such payments to the extent necessary in each budget or appropriation request submitted and adopted in accordance with applicable law. Notwithstanding the foregoing, the decision whether or not to budget and appropriate funds is within the discretion of Your governing body. In the event Your governing body fails to appropriate sufficient funds to pay all payments and other amounts due and to become due in Your next fiscal period, You may, subject to the terms hereof, terminate the applicable Lease as of the last day of the fiscal period for which the appropriations were received (an "Event of Non-appropriation"). You agree to deliver notice of an Event of Non-appropriation at least 30 days prior to the end of Your then-current fiscal period, or if an Event of Non-appropriation has not occurred by that date, promptly upon the occurrence of any such Event of Non-appropriation and to return the Equipment pursuant to Section 13 above on or before the effective date of termination. You and We understand and intend that Your obligation to pay lease payments and other amounts due under each Lease shall constitute a current expense and shall not in any way be construed to be a debt in contravention of any applicable constitutional or statutory limitations or requirements concerning Your creation of indebtedness, nor shall anything contained herein constitute a pledge of Your general tax revenues, funds or monies.

16. ADDITIONAL REPRESENTATIONS, WARRANTIES AND COVENANTS. In addition to the other representations, warranties and covenants made by You as set forth in this Master Agreement, You hereby represent, warrant and covenant unto Us that: (a) You have the power and authority under applicable law to enter into this Master Agreement and each Lease and the transactions contemplated hereby and thereby and to perform all of Your obligations hereunder and thereunder, (b) You have duly authorized the execution and delivery of this Master Agreement and each Lease by appropriate official action of Your governing body and You have obtained such other authorizations, consents and/or approvals as are necessary to consummate this Master Agreement and each Lease, and (c) all legal and other requirements have been met, and procedures have occurred, to render this Master Agreement and each Lease enforceable against You in accordance with their respective terms, and You have complied with such public bidding requirements as may be applicable to this Master Agreement and each Lease and the transactions contemplated hereby and thereby. **You hereby acknowledge that each of the representations, warranties and covenants made by You in Section 15 and 16 and elsewhere in this Master Agreement are being materially relied upon by Us in purchasing the Equipment and entering into each Lease.**

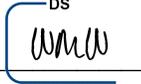
Customer's Initials: 

EXHIBIT A

I. At Sharp Leasing USA Corporation's or Sharp Electronics Corporation's ("Contractor") sole expense, Contractor shall procure and maintain the following minimum insurances with insurers authorized to do business in North Carolina and rated A-VII or better by A.M. Best, or as otherwise authorized by the Union County Risk Manager.

A. WORKERS' COMPENSATION

Statutory (coverage for three or more employees) limits covering all employees, including Employer's Liability with limits of:

\$500,000	Each Accident
\$500,000	Disease - Each Employee
\$500,000	Disease - Policy Limit

B. COMMERCIAL GENERAL LIABILITY

Covering Ongoing and Completed Operations involved in this Agreement.

\$2,000,000	General Aggregate
\$2,000,000	Products/Completed Operations Aggregate
\$1,000,000	Each Occurrence
\$1,000,000	Personal and Advertising Injury Limit

C. COMMERCIAL AUTOMOBILE LIABILITY

\$1,000,000 Combined Single Limit - Any Auto

II. ADDITIONAL INSURANCE REQUIREMENTS

A. Contractor's General Liability policy shall be endorsed, specifically or generally, to include the following as Additional Insured:

UNION COUNTY, ITS OFFICERS, AGENTS AND EMPLOYEES ARE INCLUDED AS ADDITIONAL INSURED WITH RESPECTS TO THE GENERAL LIABILITY INSURANCE POLICY.

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, Suite #130, Monroe, NC 28112, within ten (10) 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: Information Technology
Contract #: 7774

- 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: Keith A. Richards, 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.

III. 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 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.

- IV. To the extent permitted by applicable North Carolina law, Union County agrees that it will indemnify and hold harmless Sharp, its officers, agents, employees and assigns, from any loss, costs, damage, expense or liability by reason of property damage or personal injury of whatsoever nature or kind arising out of, as a result of, or caused by the negligence or willful misconduct of Union County.
- V. 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 County to terminate this Agreement, without penalty, upon notice to Contractor.
- VI. Notwithstanding anything in this Agreement to the contrary, Contractor acknowledges that Union County is subject to Chapter 132 of the North Carolina General Statutes, the Public Records Act, and that this Agreement, including all documents incorporated by reference, shall be a public record as defined in such Act, and as such, will be open to public disclosure and copying. If a public records request is made for any documents related to this event, Union County will notify Contractor of the request and of the date that any responsive documents will be released to the requester unless Contractor obtains a court order enjoining that disclosure. If Contractor fails to obtain the court order enjoining disclosure, Union County will release the requested information on the date specified.



Union County, NC

Staff Report

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

File #: 25-612

Agenda Date: 10/6/2025

TITLE:

Budget Amendment - Property & Casualty Internal Service Fund

INFORMATION CONTACT:

Jeff Morgan, Security & Risk Management, Director, 704-292-2679

ACTION REQUESTED:

Approve Budget Amendment #8 to cover the cost to add five locations to the Pollution Policy.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Staff recently investigated the process, policies, and procedures in the event of spills related to county business such as fuel, chemicals from UCW plants, or other hazardous materials.

During the investigation, it was determined that Union County has a pollution policy issued by Chubb environmental insurance, which covers against damages from unintended release of pollutants not normally covered by liability and property policies. The locations currently covered by the Chubb policy include Water Treatment Facilities, Wastewater Treatment Facilities, over 50 wastewater lift stations, hundreds of miles of wastewater lines, and several water booster stations. This policy offers coverage in the event of a hazardous spill and offers 24-hour access to an Environmental Spill Center which will be able to dispatch an environmental contractor to assist with spill remediation.

Additionally, it was determined that eight sites housing bulk chemicals (diesel, treatment chemicals, fluids, motor oil, etc.) were not included in the pollution policy that was put in place July 2023. Three of the locations, UCW Operations Center, Norwood Intake, and Yadkin WTP were added at no cost as they were associated with the existing policy. The other five locations are listed below:

- 1) Emergency Services - 2330 Concord Avenue
- 2) Fleet Services - 610 Patton Avenue
- 3) Cane Creek Park - 5213 Harkey Road
- 4) Jesse Helms Park - 1505 Summerlin Dairy Road
- 5) Sheriff's Office - 3344 Presson Road

The cost to add the five locations through the remainder of the policy (July 2026) is \$10,619. Budget Amendment #8 appropriates funds from the fund balance of the Property & Casualty Internal Service Fund to cover the cost to add these five locations to the Pollution Policy.

FINANCIAL IMPACT:

The cost to add the five locations through the remainder of the policy (July 2026) is \$10,619. Funding is available in the fund balance of the Property & Casualty Internal Service Fund.

BUDGET AMENDMENT

BUDGET Property & Casualty REQUESTED BY Jeff Morgan

FISCAL YEAR FY 2026 DATE October 6, 2025

INCREASE

Description

Fund Balance Appropriated 10,619
 Insurance & Bonding 10,619

DECREASE

Description

Explanation: Appropriate fund balance to cover the additional 5 sites to the pollution policy that renews in 2026,

DATE _____

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

FOR POSTING PURPOSES ONLY

DEBIT

<u>Code</u>	<u>Account</u>	<u>Amount</u>
81321090-5483	Insurance and Bonding	10,619
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

CREDIT

<u>Code</u>	<u>Account</u>	
81321090-4991	Fund Balance Appropriation	10,619
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Total 10,619

Total 10,619

Prepared By MN
 Posted By _____
 Date _____

Number 8



Union County, NC

Staff Report

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

File #: 25-602

Agenda Date: 10/6/2025

TITLE:

Minutes for Approval

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve minutes on Consent Agenda

PRIOR BOARD ACTIONS:

None

BACKGROUND:

Draft minutes have been provided to the Board for review and approval at the October 6, 2025, regular meeting.

FINANCIAL IMPACT:

None



Union County, NC

Staff Report

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

File #: 25-585

Agenda Date: 10/6/2025

TITLE:

Contract Report April - June 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

As noted on contracts and purchase orders.

Contract Report
April - June 2025

Department	Vendor	Purpose	Amount	Date
911 COMMUNICATIONS	DAVENPORT GROUP	Laptops for 911 Communications	\$19,272.00	4/1/2025
County Attorney's Office	Eugene Sidorin and Nadia Sidorin	Settlement Agreements for easements for E. S. and N. S., Parcel No. 04-198-047A. This is part of the Short Water Line, Ph. B project.	\$2,000.00	4/1/2025
General Services - Facilities Management	McMillan Pazdan Smith Architecture	Space planning at potential existing 40,000 sf retail space on Highway 74 East at 1620 E Roosevelt Blvd. Also site studies of adjacent Wingate owned property at Cross Creek Office Park. This will include using an existing space study performed by Creech and Associates to test fits the spaces.	\$29,900.00	4/1/2025
Sheriff's Office	STATE OF NORTH CAROLINA DEPT OF JUSTICE	SHERIFF PENSION FUND	\$25,837.88	4/1/2025
SOIL CONSERVATION	BROOKS SALES INC	Kubota RTV	\$20,951.61	4/1/2025
General Services - Facilities Management	INTER TECHNOLOGIES CORPORATION	AV INSTALLATION AT PATTON AVE	\$16,263.13	4/2/2025
Parks and Recreation	Framework For Future, Inc.	To conduct an Autism Awareness Run at Cane Creek Park	\$225.00	4/2/2025
911 Communications	Vertiv Corporation	Maintenance on UPS at the Government Center	\$13,072.96	4/3/2025
Public Works - Water & Wastewater	CAROLINA PLUMBING SERVICE INC	CAROLINA PLUMBING, \$9822.40, COPPER AT CC	\$9,822.40	4/3/2025
Human Services - Public Health	IDEXX DISTRIBUTION INC	Water sample analysis instrament	\$26,467.54	4/4/2025
Parks & Recreation	PINKSTON INC	Hustler Mower	\$9,999.00	4/4/2025
Public Communications	Level Access, Inc.	Amendment to enhance our website accessibility project by adding accessibility scanning for the water website and add 10 additional seats to the training platform for website accessibility.	\$5,990.00	4/4/2025
Sheriff's Office	Permitium, LLC	Renewal for Online Gun Permit Applications (Revenue Generating).	\$9,000.00	4/4/2025
Sheriff's Office	Cemco Electric, Inc. d/b/a Cemco Systems, Incorporated	Maintenance Service Plan on UPS System. Liebert Model EXM 65KVA. Serial #M22D003240	\$12,977.00	4/8/2025
County Attorney's Office	Vitaliy Tereshchenkov and Irina Anatolyevna Tereshchenkov c/o DAS Law Group	Settlement agreements for easements for V. T. and I.A.T. Parcel No. 08-051-032. This is part of the 762 Zone 24" Transmission Main Project. Payment will be made to DAS Law Group, which is the law office representing the property owners.	\$7,500.00	4/9/2025
Public Works - Business Operations	APPLEONE INC	APPLE ONE, \$23,000, Temporary Staffing	\$23,000.00	4/9/2025
Public Works - Business Operations	APPLEONE INC	APPLE ONE, \$23,000, Temporary Staffing	\$23,000.00	4/9/2025
BOARD OF COMMISSIONERS	OFFICE DEPOT	FURNITURE	\$5,011.09	4/14/2025
General Services - Facilities Management	TRANE U.S. INC.	HISTORIC POST OFFICE JACE UPGRADE	\$16,100.00	4/14/2025
Information Technology	Inter Technologies Corporation	The Audio/Visual rack in the control room in the BOCC needs to be reconfigured to make the system more efficient. There will be network cables run, connected, and programmed to the HR training room as an overflow room for the Chamber. Additionally, during the reprogramming, the system will be placed on the new VLAN for enhanced control.	\$7,391.84	4/14/2025
Information Technology	Inter Technologies Corporation	Upgrading the Audio/Visual system in the County Manager's Conference Room (# 929).	\$9,969.93	4/14/2025

Contract Report
April - June 2025

Sheriff's Office	CDW LLC	MASS 360 SUBSCRIPTION	\$7,827.10	4/14/2025
General Services - Facilities Management	AUTOMATED FIRE SYSTEMS INC	AUTOMATED FIRE SYSTEM REPAIRS AT THE JC	\$8,000.00	4/15/2025
General Services - Fleet Management	GRIFFIN MOTOR CO INC	REPAIRS TO ASSET 43-18	\$8,577.00	4/15/2025
HUMAN SERVICES	MOTOROLA SOLUTIONS, INC	Portable Radios	\$27,135.28	4/15/2025
Public Works - Water & Wastewater	HACH COMPANY	HACH, \$7173, 2 LASER TURBIDIMETER	\$7,173.00	4/15/2025
Public Works - Water & Wastewater	JAMES RIVER EQUIPMENT	JAMES RIVER, \$8977.19, REP SKID STEER	\$8,977.19	4/15/2025
Sheriff's Office	LAWMEN'S DISTRIBUTION LLC	REST OF SHIELD ORDER	\$8,720.00	4/15/2025
Board of County Commissioners	CivicPlus, LLC	Lynn West is the CBO One-year renewal of Code-hosting services for Union County Code Of Ordinances. Please have legal create a Notice of renewal.	\$1,595.00	4/16/2025
County Attorney's Office	CCH Incorporated (Wolters Kluwer Legal &	Digital access to VitalLaw legal publications service.	\$1,731.08	4/16/2025
General Services - Facilities Management	STEPHENS OFFICE SYSTEMS INC	FURNITURE FOR (3) OFFICES AT THE HCH	\$22,380.31	4/16/2025
General Services - Facilities Management	STEPHENS OFFICE SYSTEMS INC	PROCUREMENT OFFICE FURNITURE AT PATTON AVE	\$23,140.91	4/16/2025
General Services - Facilities Management	WEATHERGARD INC	SKYLIGHT INSTALL AT THE DETENTION CENTER	\$24,940.35	4/16/2025
Public Communications	CivicPlus, LLC	Second renewal for initial contract #7624 for NextRequest, online platform for management for public record requests. (first renewal is contract #8735)	\$9,247.77	4/16/2025
General Services - Facilities Management	ULINE	RACKS FOR THE TIRE SHOP	\$6,154.32	4/22/2025
General Services - Facilities Management	PEDRO A ORTEGO	PARKING LOT RENOVATIONS AT PATTON AVE	\$17,055.00	4/22/2025
Public Works - Business Operations	CONSOLIDATED PIPE & SUPPLY COMPANY INC	CONSOLIDATED PIPE, \$10950, 1" EXP CONNECTORS AMI	\$10,950.00	4/22/2025
Public Works - Business Operations	FERGUSON US HOLDINGS INC	FERGUSON, \$28210, MTR BODY & LIDS	\$28,210.00	4/22/2025
General Services - Facilities Management	ROGER MELTON PAINTING COMPANY	HISTORIC COURTHOUSE OFFICE PAINTING	\$11,200.00	4/23/2025
General Services - Solid Waste	GREEN RESOURCE LLC	Green Resource, \$10,653, hydroseed material	\$10,653.00	4/23/2025
COOPERATIVE EXTENSION-4-H	NORTH CAROLINA STATE UNIVERSITY	Millstone Camp for 4H	\$5,820.00	4/24/2025
General Services - Facilities Management	TK ELEVATOR CORPORATION	ELEVATOR ROLLER GUIDES REPLACEMENT	\$12,255.84	4/24/2025
Public Works - Water & Wastewater	MOTOROLA SOLUTIONS, INC	MOTOROLA, \$17201.80, 5 - APX 900 PORTABLE	\$17,201.80	4/24/2025
Human Resources	HEALTH EQUITY, INC.	Flexible spending account plan administration	\$12,000.00	4/25/2025
Public Works - Engineering	LABELLA ASSOCIATES, P.C.	Engineering and design consultant for repairs & improvements to the eastside pump station #3.	\$49,926.00	4/25/2025
Public Works - Water & Wastewater	TRAFFIC SAFETY SUPPLY CO INC	TRAFFIC SAFETY/TRANS SUPPLY, \$21445, TRAFFIC MSG BD	\$21,445.00	4/25/2025
INFORMATION SYSTEMS	MANGO TECHNOLOGIES INC	ClickUp Project Management Platform	\$6,888.00	4/28/2025
Public Works - Business Operations	APPLEONE INC	APPLEONE, \$23000, Temporary Staffing	\$23,000.00	4/28/2025
County Attorney's Office	Dewey Alan Plyler, Jr.	Settlement Agreement for easement for D.A.P. Parcel No. 02-205-006A. This parcel is part of the 762 Zone 24" Transmission Main Project.	\$13,700.00	4/29/2025
General Services - Facilities Management	GARMON MECHANICAL SERVICE INC	GAS LINE EMERGENCY STOP AT THE DENTENTION CTR	\$5,530.00	4/29/2025
General Services - Facilities Management	THE EPOXY FLOOR COMPANY LLC	TIRE SHOP EPOXY FLOORING	\$14,150.00	4/29/2025
General Services - Facilities Management	CAROLINA FURNISHING AND DESIGN	MAIN LIBRARY CHILDRENS FURNITURE	\$15,803.00	4/29/2025
General Services - Fleet Management	TWIN TRANSMISSION	REPAIRS TO ASSET 86-20	\$7,690.50	4/29/2025

Contract Report
April - June 2025

Information Technology	Granite Government Solutions	Granite Government Solutions is to replace Frontier Communications' Plain Old Telephone Service (POTS) lines at Human Services @ \$2,997.00 per year.	\$2,997.00	4/29/2025
911 COMMUNICATIONS	ENDURA LLC	New Chairs for the Backup 911 Center	\$11,241.36	5/1/2025
General Services - Facilities Management	STEPHENS OFFICE SYSTEMS INC	STOOLS FOR EMERGENCY SERVICES COMPLEX	\$1,487.30	5/1/2025
INFORMATION SYSTEMS	VDA LABS LLC	Marshville & Union West Library Wireless	\$1,831.29	5/1/2025
INFORMATION SYSTEMS	DAVENPORT GROUP	Power supplies for Data Center Racks	\$2,535.99	5/1/2025
Public Works - Business Operations	CONSOLIDATED PIPE & SUPPLY COMPANY INC	CONSOLIDATED PIPE, \$11,160 6" MASTER METERS	\$11,160.00	5/1/2025
Sheriff's Office	CEMCO SYSTEMS INC	UPS SYSTEMS UCSD JAIL	\$7,850.00	5/1/2025
County Manager's Office	Veoci Inc.	VEOCI - Crisis Management Software used for Emergency Management, Crisis Management, Risk Management, Security Management, Safety, and Security Risk Management operations.	\$16,186.00	5/2/2025
General Services - Facilities Management	MCCOLLUM INSTALL SOLUTIONS	Removal and install of modem and modem antennas	\$5,520.00	5/5/2025
General Services - Facilities Management	CONNECTIVITY LLC	FIBER AND NETWORK INSTALL AT THE TIRE SHOP	\$7,571.79	5/5/2025
General Services - Facilities Management	AUTOMATED FIRE SYSTEMS INC	JC & GC CLEAN AGENT FIRE SYSTEM UPFITS	\$17,840.00	5/5/2025
INFORMATION SYSTEMS	CONNECTIVITY LLC	Network Drops for A319 New Workstation Upfit at HS	\$941.18	5/5/2025
Public Works - Water & Wastewater	PETE DUTY AND ASSOCIATES INC	PDA, \$9955, PUMP	\$9,955.00	5/5/2025
County Attorney's Office	David A. Drummond and Nancy B. Drummond	Settlement Agreement for easement for D.A.D. and N.B.D. Parcel No.06-066-261. This parcel is part of the West Fork Twelve-Mile Creek Interceptor Project.	\$25,000.00	5/6/2025
General Services - Facilities Management	ABSOLUTE FIRE CONTROL INC	RELOCATE FDC AT SOUTHWEST REGIONAL LIBRARY	\$5,500.00	5/7/2025
General Services - Facilities Management	ALLEGION ACCESS TECHNOLOGIES LLC	MARSHVILLE LIBRARY SINGLE SLIDE DOORS	\$19,275.00	5/7/2025
General Services - Facilities Management	R&J STARNES PAINTING CONTRACTORS	UC WELLNESS CENTER WALL REPAIRS AND PAINT	\$23,053.00	5/7/2025
HUMAN SERVICES	OFFICE ENVIRONMENTS INC	Paralegal workstation	\$10,264.79	5/7/2025
Public Works - Business Operations	CARAHSOFT TECHNOLOGY CORPORATION	CARAHSOFT - BENTLEY, \$10635, OPENFLOWS	\$10,635.00	5/7/2025
Public Works - Business Operations	FERGUSON US HOLDINGS INC	FERGUSON, \$10500, 14 SENSUS UNITS	\$10,788.00	5/7/2025
Public Works - Water & Wastewater	PREFERRED SOURCES INC	PREFERRED SOURCES, \$ 14,660.00, 2 PUMPS	\$14,660.00	5/7/2025
Public Works - Water & Wastewater	MAGGART & ASSOCIATES INC	MAGGART & ASSOC, \$21700, INSPECT CATHODIC YRWTR	\$21,700.00	5/7/2025
COOPERATIVE EXT SERVICE ADMIN	ULINE	New tables for Ag center	\$3,605.30	5/8/2025
County Attorney's Office	Town of Fairview	Contract for sale and purchase of certain property located at 7402 Concord Hwy, tax identification number 08-189-030	\$30,000.00	5/8/2025
General Services - Facilities Management	L & W SUPPLY CORPORATION	CEILING TILES FOR UC WELLNESS CENTER	\$10,196.12	5/8/2025
General Services - Facilities Management	DOUGLAS CARPET AND TILE INC	CARPET REPLACEMENT AT UC WELLNESS CENTER	\$29,999.00	5/8/2025
General Services - Solid Waste	SETCO INC	Setco Inc., \$46,821.32, Solid Tires for 950 CAT	\$46,821.32	5/8/2025
Human Services - Community Support and Outreach	Screenvision Direct, Inc. d/b/a Screenvision Media	Provide tobacco cessation messaging (30 seconds) over 13-week period in two theatre locations (Sun Valley + Monroe)	\$4,481.00	5/8/2025
Human Services - Public Health	OFFICE ENVIRONMENTS INC	MH Clinic Bench	\$2,417.75	5/8/2025
Human Services - Public Health	LOVE PLUMBING & AIR COND CO INC	WATER LINE INSTALL	\$11,550.00	5/8/2025
INFORMATION SYSTEMS	MIS TOPCO L P	Landfill Router	\$3,249.57	5/8/2025

Contract Report
April - June 2025

Information Technology	AUAES INC DBA Intradyn	Cloud Email Archive Journaling Solution	\$18,252.00	5/8/2025
Public Communications	Adams Outdoor Advertising Limited Partnership	Four week campaign to promote UCANGO with Union County Transportation. This campaign is funded from Federal funds.	\$2,000.00	5/8/2025
PUBLIC COMMUNICATIONS	FRIEDMANS PREMIER SYTEMS INC	UNCLASSIFIED EQUIP/SUPPLIES	\$5,164.59	5/8/2025
Public Works - Business Operations	FERGUSON US HOLDINGS INC	FERGUSON, \$7915, OMNI METER TESTER	\$7,915.00	5/8/2025
Public Works - Business Operations	APPLEONE INC	APPLEONE, \$23,000 , Temporary Staffing	\$23,000.00	5/8/2025
Public Works - Engineering	Group North Carolina (formerly known as WK Dickson & Co., Inc.)	FY23 Short Waterline Extension Program - Phase A Task Order 8678-01 Amendment 1	\$34,500.00	5/8/2025
INFORMATION SYSTEMS	DAVENPORT GROUP	PC for Patton Ave Conf Rm Renovation	\$827.00	5/12/2025
Public Works - Business Operations	FERGUSON US HOLDINGS INC	FERGUSON, \$8280, 6" CORDONEL SENSUS METER	\$8,280.00	5/12/2025
Public Works - Business Operations	FERGUSON US HOLDINGS INC	FERGUSON, \$29,622, EXP WHEELS	\$29,622.00	5/12/2025
Public Works - Water & Wastewater	HEYWARD INCORPORATED	HEYWARD, \$5151.10, 12M BELT	\$5,151.10	5/12/2025
Public Works - Water & Wastewater	ULINE	ULINE, \$6382.35, ELECTRIC PALLET JACK	\$6,382.35	5/12/2025
Public Works - Water & Wastewater	NATIONAL ASSOCIATION OF CLEAN WATER	NACWA, \$6740, FY25 DUES 10/24-9/25	\$6,740.00	5/12/2025
Public Works - Water & Wastewater	CLEARWATER INC	CLEARWATER, \$10845, PORTABLE SAMPLER	\$10,845.00	5/12/2025
Public Works - Water & Wastewater	DXP ENTERPRISES, INC	PREMIER WATER, \$15119.54, ROTOR	\$15,119.54	5/12/2025
Public Works - Water & Wastewater	HOTSY EQUIPMENT COMPANY	HOTSY, \$16270, SKID UNIT	\$16,270.00	5/12/2025
Public Works - Water & Wastewater	LONE STAR BLOWER INC	LONESTAR BLOWER, \$21,280, REPAIR BLOWER	\$21,280.00	5/12/2025
General Services - Facilities Management	JOHNSON CONTROLS US HOLDINGS LLC	ADULT PROBATION VIDEO SYSTEM INSTALL	\$4,515.00	5/13/2025
General Services - Facilities Management	DENNIS WHEELER	Custom wall cabinets for Emergency Service	\$11,032.56	5/13/2025
General Services - Facilities Management	JOHNSON CONTROLS US HOLDINGS LLC	install and maintain a Video system for the JC	\$12,040.75	5/13/2025
INFORMATION SYSTEMS	VDA LABS LLC	Aruba Central	\$2,940.00	5/13/2025
Public Works - Water & Wastewater	CLEARWATER INC	CLEARWATER, \$29912, MONITORING SYSTEM	\$29,912.00	5/13/2025
Sheriff's Office	NC STATE BUREAU OF INVESTIGATION	(29) DESKTOP DCIN TERMINAL FEES 01/01/25-06/30/25	\$19,182.00	5/13/2025
General Services - Facilities Management	Genkler Architecture, Design & Planning, P.C. D/B/A Genkler	Task Order - Architectural Services Progress Administrative Building Reroof	\$34,317.20	5/15/2025
Public Works - Business Operations	LENOVO (UNITED STATES) INC	LENOVO, \$2863.50, 3 THINKPAD E16 G2	\$2,863.50	5/15/2025
Public Works - Water & Wastewater	BURNETT LIME COMPANY INC	BURNETT LIME, \$5450, PORTABLE CO2 UNIT	\$5,450.00	5/15/2025
Public Works - Water & Wastewater	DETECTION INSTRUMENTS	DETECTION INSTRUMENT, \$15403.69	\$15,403.69	5/15/2025
Public Works - Water & Wastewater	DATA FLOW SYSTEMS, INC	DATA FLOW, \$18108, SCADA PARTS	\$18,108.00	5/15/2025
Public Works - Water & Wastewater	HEYWARD INCORPORATED	HEYWARD, \$20724.78, CHEMICAL FEED PUMPS	\$20,724.78	5/15/2025
Public Works - Water & Wastewater	CALGON CARBON CORP	CALGON CARBON, \$27,100, CARBON FILTRASORB	\$27,100.00	5/15/2025
Soil & Water Conservation	North Carolina Department of Agriculture and	District matching funds and technical assistance	\$38,617.00	5/15/2025
General Services - Facilities Management	GRAYBAR ELECTRIC COMPANY INC	LIGHTING FOR THE UC WELLNESS CENTER	\$8,790.02	5/16/2025
INFORMATION SYSTEMS	LENOVO (UNITED STATES) INC	Laptops for IT stock	\$15,462.35	5/16/2025
INFORMATION SYSTEMS	DAVENPORT GROUP	Desktop and Monitors for IT Stock	\$24,271.00	5/16/2025
Public Works - Water & Wastewater	HD SUPPLY INC	USA BLUE BOOK, \$6024.66, TURBIDIMETER	\$6,024.66	5/16/2025
Public Works - Water & Wastewater	CURTIS POWER SOLUTIONS LLC	CURTIS POWER, \$10,132, SERVICE TO GENERATORS	\$10,132.00	5/16/2025
Public Works - Water & Wastewater	PETE DUTY AND ASSOCIATES INC	PETE DUTY, \$11485, 12M VFD REPLACEMENT	\$11,485.00	5/16/2025

Contract Report
April - June 2025

Public Works - Water & Wastewater	NET TECH INTEGRATION LLC	NET TECH, \$13102, VT SCADA REP & MODIFICATION	\$13,102.00	5/16/2025
Public Works - Water & Wastewater	CEM HOLDINGS CORPORATION	CEM, \$17,620, WASTE WATER SMART 6	\$17,620.00	5/16/2025
Public Works - Water & Wastewater	MANTECH USA INC	MANTECH, \$19212, BENCHTOP ANALYZER	\$19,212.00	5/16/2025
Public Works - Water & Wastewater	THE HARPER CORPORATION	HARPER, \$20173.20, 3" SEWER TAP	\$20,137.50	5/16/2025
Public Works - Water & Wastewater	GRIFFIN SALES INC	RODDERS \$20944, ARIES CABLE PATHFINDER	\$21,178.00	5/16/2025
Public Works - Water & Wastewater	HACH COMPANY	HACH, \$26491.57, AMMONIA ANALYZER	\$26,491.57	5/16/2025
General Services - Solid Waste	ALLEGIANCE INDUSTRIES	Allegiance Industries, \$12,168, Electrical proj.	\$12,168.00	5/19/2025
INFORMATION SYSTEMS	SHI INTERNATIONAL CORP	KnowBe4 Subscription Renewal	\$48,977.00	5/19/2025
Public Works - Water & Wastewater	SOUTHERN ENVIRONMENTAL SYSTEMS	SOUTHERN ENVIRONMENTAL, \$7997.88, FOREST PK ODOR	\$7,997.88	5/19/2025
General Services - Facilities Management	DOUGLAS CARPET AND TILE INC	UNION COUNTY WELLNESS CTR FLOORING	\$4,800.00	5/20/2025
General Services - Facilities Management	CM BOWERS LLC	WELLNESS CENTER LIGHTING	\$5,320.00	5/20/2025
General Services - Fleet Management	THE BOYD GROUP US INC	REPAIRS TO ASSET 55-19	\$5,000.00	5/20/2025
Parks and Recreation	Union Academy	To host a cross country meet at Jesse Helms Park.	\$100.00	5/20/2025
Public Works - Business Operations	FERGUSON US HOLDINGS INC	FERGUSON, \$7337.62, 2 -3" CORDONEL WTR METERS	\$7,337.62	5/20/2025
Information Technology	Inter Technologies Corporation	Upgrade to the T1V Video Wall System at the Emergency Operations Center. This will allow for one keyboard and mouse to control all aspects of the T1V instead of multiple keyboards and mice.	\$3,282.06	5/21/2025
Information Technology	Davenport Group - Dell PowerStore	The County previously invested in Dell PowerStore (Contract 9202) to support its growing data infrastructure needs. As part of ongoing capacity planning and in response to evolving storage demands, this amendment authorizes the acquisition of two additional hard drives. This expansion ensures continued system performance and aligns with anticipated future data growth.	\$21,468.00	5/21/2025
Parks and Recreation	Apex Promoz LLC	To conduct an endurance run at Jesse Helms Park.	\$500.00	5/21/2025
Sheriff's Office	Tek84 Inc.	Amendment #1 One (1) Preventive Maintenance Visit for Review, Inspection, and Potential replacement for components for Whole Body Security Scanning System for UCSO Jail	\$11,225.00	5/21/2025
COOPERATIVE EXT SERVICE ADMIN	INTER TECHNOLOGIES CORPORATION	Simpson Event Center Projection System	\$16,002.75	5/22/2025
Information Technology	Inter Technologies Corporation	The EOC room upgrade will allow for the presentation signals to be sent to the two conference rooms and the training room. It will also allow these rooms to interact and send information to the main EOC T1V display. In addition, this will make it easier to have breakout sessions during emergencies.	\$10,851.46	5/22/2025
Information Technology	Avineon, Inc.	Continuation of GIS Managed Services Program	\$13,500.00	5/22/2025
Public Communications	Adams Outdoor Advertising Limited Partnership	Breathe Easier 4 week Billboard Anti-Tobacco Campaign, funded by state grant.	\$2,600.00	5/22/2025
REGISTER OF DEEDS	KOFIE PRESERVATION INC	Records Preservation	\$27,684.00	5/22/2025
Sheriff's Office	WEST CHATHAM WARNING DEVICES INC	DUO ION UCSO	\$8,899.20	5/22/2025
Sheriff's Office	JOHNSON CONTROLS US HOLDINGS LLC	UCSO EXACQ VISION, SA-SUPP, NORTH CARD ACCESS	\$42,861.62	5/22/2025

Contract Report
April - June 2025

Finance	Fifth Asset, Inc d/b/a DebtBook	Debt, Lease, and SBITA management SAAS subscription	\$49,500.00	5/23/2025
HUMAN SERVICES	INTER TECHNOLOGIES CORPORATION	MIC SYSTEM	\$10,456.80	5/23/2025
HUMAN SERVICES	ZOETIS US LLC	VETSCAN IMAGYST, PM 10023845	\$19,000.00	5/23/2025
HUMAN SERVICES	ZOETIS US LLC	VETSCAN OPTICELL, PN 10027172 AND 2025 FREE VETSCA	\$20,995.00	5/23/2025
Sheriff's Office	VEHICLE INSTALLS LLC	(10) VEHICLE UPFIT	\$37,000.00	5/23/2025
Tax Administration - Revenue	Cummins-Allison, A CPI Brand and Company	Maintenance Agreement for Jetscan iFX Model I131, Jetsort Model 606 and SNBC M3000d Printer	\$1,127.00	5/23/2025
911 Communications	Vertiv Corporation	Battery replacement for UPS system at the Government Center for the backup PSAP operations.	\$11,312.40	5/27/2025
General Services - Facilities Management	MSS SOLUTIONS LLC	ACCESS CONTROL INSTALL FOR THE TAX ASSESSOR DOOR	\$7,162.00	5/28/2025
INFORMATION SYSTEMS	LENOVO (UNITED STATES) INC	Lenovo Laptops for UC Tax Appraisers	\$18,900.00	5/29/2025
Public Works - Water & Wastewater	PETE DUTY AND ASSOCIATES INC	PDA, \$6436.62, JAARS SEWER PUMP REPAIR	\$6,436.62	5/29/2025
General Services - Facilities Management	Lawrence Companies, LLC d/b/a Providence	Amend contract #7330 to add additional mowing at the Firing Range.	\$1,053.00	5/30/2025
General Services - Solid Waste	D A GRIFFIN CONSTRUCTION LLC	DA Griffin Construction, \$6,000, install bollards	\$6,000.00	5/30/2025
INFORMATION SYSTEMS	INTER TECHNOLOGIES CORPORATION	T1V Subscriptions for 911 and EOC	\$7,634.71	5/30/2025
INSPECTION	KATOM RESTAURANT SUPPLY	ice machine	\$5,402.00	6/2/2025
General Services - Facilities Management	LOCKWOOD IDENTITY INC	GC LOBBY SIGNAGE REMOVAL AND INSTALL	\$2,035.00	6/3/2025
General Services - Facilities Management	CONNECTIVITY LLC	INSTALL DATA CABLES AT CANE CREEK	\$13,237.33	6/3/2025
HUMAN SERVICES	ZOETIS US LLC	VETSCAN UA AND VETSCAN VS2	\$8,977.88	6/3/2025
Human Services - Public Health	BENCO DENTAL	AUTOCLAVE	\$5,719.63	6/3/2025
Public Works - Engineering	CDM Smith Inc.	Professional services related to a carbon dioxide pilot study for the YRWTP	\$49,000.00	6/3/2025
Human Services - Business Operations	7taps OpCo, LLC	Training Platform	\$1,600.00	6/4/2025
Information Technology	Inter Technologies Corporation	The current TV in B202/WIC Training Room at UC Human Services has a screen burn in (permanent damage) and needs to be replaced for optimal visibility.	\$2,408.06	6/4/2025
Public Works - Water & Wastewater	TROTT COMMUNICATIONS GROUP INC	TROTT, \$9990, REVIEW WATER FCC MATTERS	\$9,990.00	6/4/2025
General Services - Facilities Management	HT AIRSYSTEMS CAROLINAS LLC	MAIN LIBRARY AIR HANDLER REPAIR	\$9,690.22	6/6/2025
Public Works - Engineering	WSE of North Carolina, PC d/b/a Weston & Sampson Engineers, Inc.	Re-assignment of contract from MBD Consulting Engineers to Weston & Sampson Engineers as MBD was acquired by Weston & Sampson. Existing MBD contract that needs re-assignment is #7481	\$5,175.00	6/6/2025
Information Technology	Inter Technologies Corporation	Procurement and installation of audiovisual (AV) upgrades to Courtroom 7 in the Administration of Courts Building. The scope includes enhanced sound and control components to support modern court operations and improve overall courtroom functionality.	\$11,466.68	6/9/2025
General Services - Facilities Management	Trash Control, Inc.	Amend contract #8812 to add one (1) 4yd container at Fairview EMS.	\$1,664.00	6/10/2025

Contract Report
April - June 2025

Information Technology	Charter Communications Operating, LLC dba Spectrum	This is a Service Order with Spectrum to add Business Internet and 1 Static IP services for the Landfill's temporary office located at 2125-A Austin Chaney Rd., Wingate, NC 28173. This will be a month-to-month recurring charge at \$195.00 total per month with a one-time enterprise internet install charge of \$100.00.	\$4,780.00	6/10/2025
Public Works - Water & Wastewater	Univar Solutions USA LLC	Contract for Ortho-Polyphosphate for the Yadkin River Water Treatment Plant.	\$22,000.00	6/11/2025
General Services - Facilities Management	VANNS WELDING & ORNAMENTAL WORKS INC	DETENTION CENTER DOOR FRAME REPAIRS	\$6,000.00	6/13/2025
General Services - Facilities Management	TRANE U.S. INC.	GOVERNMENT CENTER JACE REPLACEMENT	\$20,500.00	6/13/2025
County Manager's Office	Duke Energy Carolinas, LLC	This item will be presented to the BoCC for approval on the March 3rd Meeting. Duke Energy Carolinas, LLC received a request for service to the property adjacent to union county property, Duke Energy is requesting new easement agreement to install facilities across from 3208 Presson Rd.	\$1.00	6/16/2025
General Services - Facilities Management	MSS FIRE & SECURITY LLC	Security upgrades at GC lobby	\$48,005.00	6/16/2025
Public Works - Engineering	HDR Engineering, Inc. of the Carolinas	Amendment 01 to Task Order 8683-02 for on-call hydraulic modeling services. No change in scope of work, cost is increasing and will require BOCC approval as total expenditure will now exceed \$50k	\$48,400.00	6/17/2025
General Services - Facilities Management	DRYS ENTERPRISE INC	PROGRESS BUILDING ROLL UP DOOR	\$11,500.00	6/19/2025
General Services - Facilities Management	DEMOLITION AND ASBESTOS REMOVAL INC	HISTORIC POST OFFICE ASBESTOS FLOORING REMOVAL	\$29,800.00	6/19/2025
Human Resources	The Tharpe Company, Inc. d/b/a Engage2Excel	Human Resources has a contract with the Tharpe Company to administer our employee service awards program. Our first renewal term ends in July. We have two one-year renewal options and would like to renew the contract for one additional year.	\$21,190.00	6/20/2025
Public Works - Water & Wastewater	DATA FLOW SYSTEMS, INC	DATA FLOW, \$10,050, FCC LICENSING SERVICES 67 SITE	\$10,050.00	6/23/2025
Public Works - Water & Wastewater	DATA FLOW SYSTEMS, INC	DATA FLOW, \$23,150, REMOTE TELEMETRY	\$23,150.00	6/23/2025
Human Resources	McGriff, a Marsh & McLennan Agency LLC Company	Administration of the Health Reimbursement Account benefit for the six-month run-out period following the transition to BlueCross and BlueShield.	\$32,500.00	6/24/2025
General Services - Solid Waste	Civil & Environmental Consultants, Inc	C&D Landfill Airspace Study for the Solid Waste Annual Report	\$25,000.00	6/27/2025

Fixed Price Term Agreement Spend	
Friedman's Premiere Systems DBA iPromo	\$21,822.08
Unifirst Corporation	\$38,003.60



Union County, NC

Staff Report

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

File #: 25-591

Agenda Date: 10/6/2025

TITLE:

Human Resources Reports for August 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

These reports include all new hires, separations from service, and retirements for Union County Local Government for the month of August 2025.

FINANCIAL IMPACT:

None.

**UNION COUNTY PERSONNEL REPORT
REPORT OF NEW HIRES**

August 2025

<u>Name</u>	<u>Hire Date</u>	<u>Position</u>
FACILITIES MANAGEMENT		
KEVIN J CALKINS	8/25/25	SR FACILITIES MAINTENANCE TECH
FLEET MANAGEMENT		
DERRELL M RUSS	8/11/25	EMRG VHCL EQUIP TECHNICIAN
HS - PUBLIC HEALTH		
ANNETTE E RAMIREZ LLANOS	8/11/25	CLINICAL ASSISTANT
SHENITA I FOUNTAIN	8/25/25	SOCIAL WORKER
FAITH B PATRICK	8/25/25	PUBLIC HEALTH NURSE
HS - SOCIAL SERVICES		
NAKITA Y BRISBON	8/11/25	BEHAVIORAL HEALTH THERAPIST
MADELINE C GUILLOT	8/11/25	BEHAVIORAL HEALTH THERAPIST
ASHLEY M MENDICINO	8/11/25	SENIOR ELIGIBILITY SPECIALIST
AERIAL N SMITH	8/11/25	ELIGIBILITY SPECIALIST
EVERETT M JETER	8/25/25	ELIGIBILITY SUPERVISOR
HS - TRANSPORTATION		
CARLOS A LEBRON	8/11/25	TRANSPORTATION DISPATCHER
PARKS AND RECREATION		
LINIQUE M BOUWER	8/11/25	PARK RANGER
WESLEY R TAYLOR	8/11/25	PARK RANGER
SEAN A PATTON	8/27/25	PARK RANGER - SEASONAL
PUBLIC LIBRARY		
CARA L BROWN	8/11/25	LIBRARY ASSOCIATE PT
CAITLIN B CRUMP	8/11/25	LIBRARY ASSOCIATE PT
TALISHA N WALLACE	8/25/25	LIBRARY ASSISTANT PT
SHERIFF/JAIL/FAC 80.5 HRS		
JUSTIN K LOGAN	8/11/25	DETENTION OFFICER
IRVIN MUNOZ-GOMEZ	8/11/25	DETENTION OFFICER
TREVOR A RASKIN	8/11/25	DETENTION OFFICER
CHRISTOPHER O ALLEN	8/25/25	DEPUTY SHERIFF MASTER
RYAN J GOLDSTEIN	8/25/25	DEPUTY SHERIFF
SHERIFF/JAIL/FACILITIES		
EMMA K PETERSON	8/25/25	SHERIFF'S SERVICES SPECIALIST
BROOKLYN M ROLLINS	8/25/25	SHERIFF'S SERVICES SPECIALIST
SOLID WASTE		
ANTHONY E BEATTY	8/11/25	UTILITY SITE ATTENDANT PT

<u>Name</u>	<u>Hire Date</u>	<u>Position</u>
UCW - PLANNING & RESOURCE MGMT		
DAVID A WILLIAMS	8/11/25	APPLICATIONS ANALYST
UCW - WATER & WASTEWATER OPS		
QOREN R WILLIAMS	8/11/25	UTILITY TECHNICIAN I
JAMES J HULSEY	8/25/25	WAREHOUSE TECHNICIAN
MCKINLEY E LAVERY	8/25/25	UTILITY TECHNICIAN I

**UNION COUNTY PERSONNEL REPORT
REPORT OF RETIREES AND SEPARATIONS FROM SERVICE**

August 2025

<u>Name</u>	<u>Hire Date</u>	<u>Separation Date</u>	<u>Position</u>
RETIREES			
HS - PUBLIC HEALTH			
CYNTHIA W SPRATT	11/12/08	8/29/25	PUBLIC HEALTH NURSE
SHERIFF/JAIL/FACILITIES			
SHARON E TUCKER	9/9/02	8/29/25	SHERIFF'S SERVICES SPECIALIST
WILLIE H BLACKWELL	11/27/06	8/31/25	DEPUTY SHERIFF
SANDRA D SMITH	5/14/07	8/31/25	ACCOUNTING SPECIALIST
SEPARATION FROM SERVICE			
911 COMMUNICATIONS			
BEVERLY B LOGAN	3/24/25	8/22/25	TELECOMMUNICATOR I
HALEY K LILES	7/14/25	8/14/25	TELECOMMUNICATOR I
BUDGET & GRANTS MANAGEMENT			
TIFFANY N ARANT	3/27/23	8/13/25	GRANTS SPECIALIST PT
LOVETTA S WALTON	7/17/23	8/13/25	GRANTS SPECIALIST PT
ENVIRONMENTAL HEALTH			
HALEY A MULLIS	2/13/23	8/14/25	ENVIRONMENTAL HEALTH SPEC
BRANDY C BAUCOM	6/2/25	8/22/25	OFFICE SUPERVISOR
FINANCE			
AMBER N DANIELS	3/10/25	8/5/25	SENIOR ACCOUNTANT
FLEET MANAGEMENT			
AUBREY L BAHAM	1/27/25	8/29/25	EMRG VHCL EQUIP TECHNICIAN
HS - PUBLIC HEALTH			
KEISHA N PALMER	1/13/25	8/15/25	PUBLIC HEALTH NURSE
HS - SOCIAL SERVICES			
JOI N BAILEY	11/25/19	8/15/25	SOCIAL WORK SUPERVISOR
BLAKE J KELLUM	11/7/22	8/15/25	BEHAVIORAL HEALTH THERAPIST
CATELYN M ERVING	6/16/25	8/15/25	ELIGIBILITY SPECIALIST
HS - TRANSPORTATION			
SAMUEL T ROLLINS	6/8/20	8/15/25	TRANSPORTATION OPS SUPERVISOR
KEVIN P FONSECA	10/7/24	8/20/25	TRANSPORTATION DRIVER
PARKS AND RECREATION			
AVERY A PLYLER	5/14/25	8/15/25	PARK RANGER - SEASONAL
PROCUREMENT			
CHERYL D WRIGHT	9/16/13	8/22/25	DIR PROC & CONTRACT MGMT
PUBLIC COMMUNICATIONS			
AILEEN E WHITE	11/18/24	8/18/25	ADMINISTRATIVE PROF II BPT

<u>Name</u>	<u>Hire Date</u>	<u>Separation Date</u>	<u>Position</u>
PUBLIC LIBRARY			
LEAH B RABY	2/26/24	8/7/25	LIBRARY ASSOCIATE PT
ISABELLA C LATTA	8/12/24	8/28/25	LIBRARY ASSOCIATE
ASHLEY T DIXON	9/23/24	8/15/25	LIBRARY ASSOCIATE PT
SHERIFF/JAIL/FAC 80.5 HRS			
ROBERT D NEELEY	8/14/23	8/25/25	DETENTION OFFICER
SOLID WASTE			
MACK E LOFTIS	9/24/13	8/9/25	UTILITY SITE ATTENDANT PT
TA - ASSESSMENT			
AMY L WINN	2/19/18	8/21/25	SENIOR LAND RECORDS SPECIALIST
UCW - UTILITY BUSINESS SVCS			
AARON M WILMOTH	5/6/24	8/11/25	CUSTOMER SERVICE SPECIALIST



Union County, NC

Staff Report

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

File #: 25-598

Agenda Date: 10/6/2025

TITLE:

Tax Refunds, Releases and Prorations Approved by Finance Officer

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

On September 8, 2020, the Board of Commissioners adopted a Resolution Delegating Authority for Tax Releases and Refunds of less than \$100 to Union County's Finance Officer. The resolution and NC GS 105-381(b) require such refunds to be reported to the Board regarding actions taken on requests for releases or refunds. All such actions shall be recorded in the Board's minutes. NC GS 105-330.6 authorizes the tax collector to direct an order for a tax refund of prorated taxes to the county finance officer related to surrendering of registered motor vehicle plates. The finance officer shall issue a refund to the vehicle owner. The attached report is for August 2025 NCVTS releases and refunds less than \$100 and prorations approved by the finance officer.

FINANCIAL IMPACT:

None.



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change	
ABSOLUTE LAWN MAINTENANCE INC	ABSOLUTE LAWN MAINTENANCE INC		PO BOX 793		MONROE, NC 28111	Adjustment < \$100	0083698376	KCS354	PENDING	938834976	Refund Generated due to adjustment on Bill #0083698376-2024-2024-0000	Situs error	8/21/2025		001	TAX	\$0.00	\$0.00	\$0.00	
															200	TAX	(\$67.08)	\$0.00	(\$67.08)	
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
															015	TAX	\$7.37	\$0.00	\$7.37	
															003	TAX	\$0.00	\$0.00	\$0.00	
															005	TAX	\$0.00	\$0.00	\$0.00	
															004	TAX	\$0.00	\$0.00	\$0.00	
															002	TAX	\$0.00	\$0.00	\$0.00	
															Refund					\$89.71
															001	TAX	(\$3.76)	\$0.00	(\$3.76)	
ALAMILLA MENDOZA, CLAUDIA	ALAMILLA MENDOZA, CLAUDIA		4828 ALDERSBROOK DR		MONROE, NC 28110	Proration	0084706854	VFL6864	AUTHORIZED	813988196	Refund Generated due to proration on Bill #0084706854-2024-2024-0000-00	Vehicle Sold	8/19/2025	8/20/2025	200	TAX	(\$11.56)	\$0.00	(\$11.56)	
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
															003	TAX	(\$0.40)	\$0.00	(\$0.40)	
															005	TAX	(\$0.09)	\$0.00	(\$0.09)	
															004	TAX	(\$0.67)	\$0.00	(\$0.67)	
															002	TAX	(\$8.61)	\$0.00	(\$8.61)	
															Refund					\$25.09
															001	TAX	(\$3.97)	\$0.00	(\$3.97)	
															200	TAX	(\$12.22)	\$0.00	(\$12.22)	
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
ALAMILLA MENDOZA, CLAUDIA	ALAMILLA MENDOZA, CLAUDIA		4828 ALDERSBROOK DR		MONROE, NC 28110	Proration	0085432178	VFZ1903	AUTHORIZED	815979542	Refund Generated due to proration on Bill #0085432178-2024-2024-0000-00	Vehicle Sold	8/28/2025	8/29/2025	003	TAX	(\$0.42)	\$0.00	(\$0.42)	
															005	TAX	(\$0.09)	\$0.00	(\$0.09)	
															004	TAX	(\$0.71)	\$0.00	(\$0.71)	
															002	TAX	(\$9.11)	\$0.00	(\$9.11)	
															Refund					\$26.52
															001	TAX	(\$18.07)	\$0.00	(\$18.07)	
															600	TAX	(\$20.48)	\$0.00	(\$20.48)	
															023	TAX	(\$5.67)	\$0.00	(\$5.67)	
															003	TAX	(\$1.93)	\$0.00	(\$1.93)	
															005	TAX	(\$0.43)	\$0.00	(\$0.43)	
004	TAX	(\$3.23)	\$0.00	(\$3.23)																
002	TAX	(\$41.42)	\$0.00	(\$41.42)																
Refund					\$91.23															
BADEN, HEATHER LEE	BADEN, HEATHER LEE		2214 MADEIRA CIR		WAXHAW, NC 28173	Proration	0048682891	PME9581	AUTHORIZED	697919496	Refund Generated due to proration on Bill #0048682891-2024-2024-0000-00	Vehicle Sold	8/20/2025	8/21/2025	001	TAX	(\$4.90)	\$0.00	(\$4.90)	
															015	TAX	(\$1.66)	\$0.00	(\$1.66)	
															003	TAX	(\$0.52)	\$0.00	(\$0.52)	
															005	TAX	(\$0.12)	\$0.00	(\$0.12)	
															004	TAX	(\$0.87)	\$0.00	(\$0.87)	
															002	TAX	(\$11.22)	\$0.00	(\$11.22)	
															Refund					\$19.29
															001	TAX	(\$21.42)	\$0.00	(\$21.42)	
															900	TAX	(\$2.62)	\$0.00	(\$2.62)	
															021	TAX	(\$8.88)	\$0.00	(\$8.88)	
003	TAX	(\$2.30)	\$0.00	(\$2.30)																
005	TAX	(\$0.51)	\$0.00	(\$0.51)																
004	TAX	(\$3.83)	\$0.00	(\$3.83)																
002	TAX	(\$49.10)	\$0.00	(\$49.10)																
Refund					\$88.66															
BELK, KENNETH LEE	BELK, KENNETH LEE		3005 TIFFANY DR		MONROE, NC 28110	Proration	0039729884	42465A	AUTHORIZED	813217419	Refund Generated due to proration on Bill #0039729884-2024-2024-0000-00	Vehicle Sold	8/14/2025	8/15/2025	001	TAX	(\$3.75)	\$0.00	(\$3.75)	
															200	TAX	(\$11.56)	\$0.00	(\$11.56)	
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
															003	TAX	(\$0.40)	\$0.00	(\$0.40)	
															005	TAX	(\$0.09)	\$0.00	(\$0.09)	
															004	TAX	(\$0.67)	\$0.00	(\$0.67)	
															002	TAX	(\$8.60)	\$0.00	(\$8.60)	
															Refund					\$25.07
															001	TAX	(\$6.14)	(\$0.31)	(\$6.45)	
															600	TAX	(\$6.97)	(\$0.34)	(\$7.31)	
026	TAX	(\$1.50)	(\$0.08)	(\$1.58)																
003	TAX	(\$0.66)	(\$0.03)	(\$0.69)																
005	TAX	(\$0.15)	(\$0.01)	(\$0.16)																
004	TAX	(\$1.10)	(\$0.05)	(\$1.15)																
002	TAX	(\$14.08)	(\$0.71)	(\$14.79)																
Refund					\$32.43															
BEYERO, NAHOM MESFIN	BEYERO, NAHOM MESFIN		4011 THORNDALE RD		INDIAN TRAIL, NC 28079	Adjustment < \$100	0071352636	KBN3715	PENDING	815687180	Refund Generated due to adjustment on Bill #0071352636-2024-2024-0000-00	SLVG or RBLT TTL	8/27/2025		001	TAX	(\$44.50)	\$0.00	(\$44.50)	
															900	TAX	(\$5.45)	\$0.00	(\$5.45)	
															021	TAX	(\$18.46)	\$0.00	(\$18.46)	
															003	TAX	(\$4.77)	\$0.00	(\$4.77)	
															005	TAX	(\$1.06)	\$0.00	(\$1.06)	
															004	TAX	(\$7.96)	\$0.00	(\$7.96)	
															002	TAX	(\$102.04)	\$0.00	(\$102.04)	
															Refund					\$184.24
															001	TAX	(\$44.50)	\$0.00	(\$44.50)	
															900	TAX	(\$5.45)	\$0.00	(\$5.45)	
021	TAX	(\$18.46)	\$0.00	(\$18.46)																
003	TAX	(\$4.77)	\$0.00	(\$4.77)																
005	TAX	(\$1.06)	\$0.00	(\$1.06)																
004	TAX	(\$7.96)	\$0.00	(\$7.96)																
002	TAX	(\$102.04)	\$0.00	(\$102.04)																
Refund					\$184.24															



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
BOARD, BRIAN JOSEPH	BOARD, BRIAN JOSEPH	BOARD, MICHELLE MARIE	3853 TWIN LAKES DR		MATTHEWS, NC 28184	Proration	0066781016	PFZ5038	AUTHORIZED	698332128	Refund Generated due to proration on Bill #0066781016-2023-2023-0000-00	Vehicle Sold	8/22/2025	8/25/2025	001	TAX	(\$6.11)	\$0.00	(\$6.11)
															800	TAX	(\$1.68)	\$0.00	(\$1.68)
															003	TAX	(\$0.65)	\$0.00	(\$0.65)
															005	TAX	(\$0.15)	\$0.00	(\$0.15)
															004	TAX	(\$1.09)	\$0.00	(\$1.09)
															002	TAX	(\$14.01)	\$0.00	(\$14.01)
Refund																	\$23.69		
BOARD, MICHELLE MARIE	BOARD, MICHELLE MARIE	BOARD, BRIAN JOSEPH	3853 TWIN LAKES DR		MATTHEWS, NC 28184	Proration	0083535741	LH22483	AUTHORIZED	814720802	Refund Generated due to proration on Bill #0083535741-2024-2024-0000-00	Vehicle Totalled	8/22/2025	8/25/2025	001	TAX	(\$36.83)	\$0.00	(\$36.83)
															800	TAX	(\$5.64)	\$0.00	(\$5.64)
															026	TAX	(\$8.98)	\$0.00	(\$8.98)
															003	TAX	(\$3.95)	\$0.00	(\$3.95)
															005	TAX	(\$0.88)	\$0.00	(\$0.88)
															004	TAX	(\$6.59)	\$0.00	(\$6.59)
002	TAX	(\$84.44)	\$0.00	(\$84.44)															
Refund																	\$147.31		
BOATRIGHT, JACKSON FOREST	BOATRIGHT, JACKSON FOREST		1408 CLONTZ LONG RD		MONROE, NC 28110	Proration	0085752546	9L7544	AUTHORIZED	812979741	Refund Generated due to proration on Bill #0085752546-2024-2024-0000-00	Vehicle Totalled	8/13/2025	8/14/2025	001	TAX	(\$13.71)	\$0.00	(\$13.71)
															900	TAX	(\$1.68)	\$0.00	(\$1.68)
															021	TAX	(\$5.68)	\$0.00	(\$5.68)
															003	TAX	(\$1.47)	\$0.00	(\$1.47)
															005	TAX	(\$0.32)	\$0.00	(\$0.32)
															004	TAX	(\$2.45)	\$0.00	(\$2.45)
002	TAX	(\$31.43)	\$0.00	(\$31.43)															
Refund																	\$56.74		
BONILLA, JORGE HUMBERTO	BONILLA, JORGE HUMBERTO		1901 PLEASANT KNOLL LN		MONROE, NC 28112	Proration	0080005643	FDV2261	AUTHORIZED	814239524	Refund Generated due to proration on Bill #0080005643-2024-2024-0000-00	Vehicle Sold	8/20/2025	8/21/2025	001	TAX	(\$10.10)	\$0.00	(\$10.10)
															200	TAX	(\$31.10)	\$0.00	(\$31.10)
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															003	TAX	(\$1.08)	\$0.00	(\$1.08)
															005	TAX	(\$0.24)	\$0.00	(\$0.24)
															004	TAX	(\$1.81)	\$0.00	(\$1.81)
002	TAX	(\$23.16)	\$0.00	(\$23.16)															
Refund																	\$67.49		
BOONE, MICHAEL LEE	BOONE, MICHAEL LEE	BOONE, MARIAS	4210 ROGERS RD		MONROE, NC 28110	Proration	0057498881	HLF1268	AUTHORIZED	812979972	Refund Generated due to proration on Bill #0057498881-2024-2024-0000-00	Vehicle Sold	8/13/2025	8/14/2025	001	TAX	(\$3.10)	\$0.00	(\$3.10)
															200	TAX	(\$9.56)	\$0.00	(\$9.56)
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															003	TAX	(\$0.33)	\$0.00	(\$0.33)
															005	TAX	(\$0.07)	\$0.00	(\$0.07)
															004	TAX	(\$0.55)	\$0.00	(\$0.55)
002	TAX	(\$7.12)	\$0.00	(\$7.12)															
Refund																	\$20.73		
BRADSHAW, JEFFREY JOE	BRADSHAW, JEFFREY JOE		1003 HOLLYHEDGE LN		INDIAN TRAIL, NC 28079	Proration	0052418401	JD54723	AUTHORIZED	810638780	Refund Generated due to proration on Bill #0052418401-2024-2024-0000-00	Vehicle Sold	8/1/2025	8/4/2025	001	TAX	(\$17.50)	\$0.00	(\$17.50)
															600	TAX	(\$10.83)	\$0.00	(\$10.83)
															020	TAX	(\$5.73)	\$0.00	(\$5.73)
															003	TAX	(\$1.88)	\$0.00	(\$1.88)
															005	TAX	(\$0.42)	\$0.00	(\$0.42)
															004	TAX	(\$3.13)	\$0.00	(\$3.13)
002	TAX	(\$40.12)	\$0.00	(\$40.12)															
Refund																	\$88.61		
BREWER, NATHANIEL JAMES	BREWER, NATHANIEL JAMES		2842 BOWWHITE CIR	2842 A	WINGATE, NC 28174	Adjustment < \$100	0081126657	LFM1486	PENDING	930560256	Refund Generated due to adjustment on Bill #0081126657-2024-2024-0000	Situs error	8/20/2025		001	TAX	\$0.00	\$0.00	\$0.00
															200	TAX	(\$16.98)	\$0.00	(\$16.98)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															022	TAX	\$2.89	\$0.00	\$2.89
															003	TAX	\$0.00	\$0.00	\$0.00
															005	TAX	\$0.00	\$0.00	\$0.00
004	TAX	\$0.00	\$0.00	\$0.00															
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$44.09		
BROOKS, XAVIER JAMAL	BROOKS, XAVIER JAMAL		6106 EISENHOUR LN		INDIAN TRAIL, NC 28079	Adjustment < \$100	0081103216	LFM1336	PENDING	1047191634	Refund Generated due to adjustment on Bill #0081103216-2024-2024-0000	Situs error	8/21/2025		001	TAX	\$0.00	\$0.00	\$0.00
															900	TAX	\$48.80	\$0.00	\$48.80
															200	TAX	(\$115.40)	\$0.00	(\$115.40)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															023	TAX	\$11.76	\$0.00	\$11.76
															003	TAX	\$0.00	\$0.00	\$0.00
005	TAX	\$0.00	\$0.00	\$0.00															
004	TAX	\$0.00	\$0.00	\$0.00															
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$84.84		
BROWN, CHRISTIAN THOMAS	BROWN, CHRISTIAN THOMAS		9809 SEDGEFIELD DR		WAXHAW, NC 28173	Proration	0051174385	CADENZA	AUTHORIZED	931791384	Refund Generated due to proration on Bill #0051174385-2024-2024-0000-00	Vehicle Sold	8/25/2025	8/26/2025	001	TAX	(\$13.25)	\$0.00	(\$13.25)
															101	TAX	(\$6.50)	\$0.00	(\$6.50)
															101	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															026	TAX	(\$3.23)	\$0.00	(\$3.23)
															003	TAX	(\$1.42)	\$0.00	(\$1.42)
															005	TAX	(\$0.32)	\$0.00	(\$0.32)
004	TAX	(\$2.37)	\$0.00	(\$2.37)															
002	TAX	(\$30.39)	\$0.00	(\$30.39)															
Refund																	\$57.48		



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change													
BROWN, SUSAN ROBERTA	BROWN, SUSAN ROBERTA		8450 NORMAN FOREST RD		LANCASTER, SC 29720	Proration	0075347098	JJK5748	AUTHORIZED	929633072	Refund Generated due to proration on Bill #0075347098-2024-2024-0000-00	Reg. Out of state	8/15/2025	8/18/2025	001	TAX	(\$29.96)	\$0.00	(\$29.96)													
															500	TAX	(\$70.68)	\$0.00	(\$70.68)													
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00													
															028	TAX	(\$9.60)	\$0.00	(\$9.60)													
															003	TAX	(\$3.21)	\$0.00	(\$3.21)													
															005	TAX	(\$0.72)	\$0.00	(\$0.72)													
															004	TAX	(\$5.36)	\$0.00	(\$5.36)													
															002	TAX	(\$68.69)	\$0.00	(\$68.69)													
															Refund																	
															\$188.22																	
BURNS, MATTIE MAE	BURNS, MATTIE MAE		1410 ACME RD		MARSHVILLE, NC 28103	Proration	0016584531	THF1034	AUTHORIZED	699159000	Refund Generated due to proration on Bill #0016584531-2024-2024-0000-00	Vehicle Sold	8/27/2025	8/28/2025	001	TAX	(\$5.23)	\$0.00	(\$5.23)													
															018	TAX	(\$2.35)	\$0.00	(\$2.35)													
															003	TAX	(\$0.56)	\$0.00	(\$0.56)													
															005	TAX	(\$0.13)	\$0.00	(\$0.13)													
															004	TAX	(\$0.93)	\$0.00	(\$0.93)													
															002	TAX	(\$11.98)	\$0.00	(\$11.98)													
															Refund																	
\$21.18																																
CARACCIOLI, ANTONIO	CARACCIOLI, ANTONIO		2103 TREE RIDGE RD		INDIAN TRAIL, NC 28079	Proration	0082640161	VFH2419	AUTHORIZED	812980301	Refund Generated due to proration on Bill #0082640161-2024-2024-0000-00	Vehicle Sold	8/13/2025	8/14/2025	001	TAX	(\$4.59)	\$0.00	(\$4.59)													
															600	TAX	(\$5.21)	\$0.00	(\$5.21)													
															023	TAX	(\$1.44)	\$0.00	(\$1.44)													
															003	TAX	(\$0.49)	\$0.00	(\$0.49)													
															005	TAX	(\$0.11)	\$0.00	(\$0.11)													
															004	TAX	(\$0.82)	\$0.00	(\$0.82)													
															002	TAX	(\$10.53)	\$0.00	(\$10.53)													
															Refund																	
\$23.19																																
CARNEIRO, ANTHONY LAWRENCE	CARNEIRO, ANTHONY LAWRENCE		1019 BROOKSLAND PL		WAXHAW, NC 28173	Proration	0082802243	VFH2460	AUTHORIZED	699160338	Refund Generated due to proration on Bill #0082802243-2024-2024-0000-00	Vehicle Sold	8/27/2025	8/28/2025	001	TAX	(\$39.01)	\$0.00	(\$39.01)													
															015	TAX	(\$13.19)	\$0.00	(\$13.19)													
															003	TAX	(\$4.18)	\$0.00	(\$4.18)													
															005	TAX	(\$0.93)	\$0.00	(\$0.93)													
															004	TAX	(\$6.98)	\$0.00	(\$6.98)													
															002	TAX	(\$89.45)	\$0.00	(\$89.45)													
															Refund																	
\$153.74																																
CASEY, KRISTA KAUFFMAN	CASEY, KRISTA KAUFFMAN		1440 GREAT RD		WAXHAW, NC 28173	Proration	0032339198	BME6798	AUTHORIZED	930836952	Refund Generated due to proration on Bill #0032339198-2024-2024-0000-00	Vehicle Sold	8/21/2025	8/22/2025	001	TAX	(\$9.06)	\$0.00	(\$9.06)													
															500	TAX	(\$21.37)	\$0.00	(\$21.37)													
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00													
															028	TAX	(\$2.90)	\$0.00	(\$2.90)													
															003	TAX	(\$0.97)	\$0.00	(\$0.97)													
															005	TAX	(\$0.22)	\$0.00	(\$0.22)													
															004	TAX	(\$1.62)	\$0.00	(\$1.62)													
															002	TAX	(\$20.77)	\$0.00	(\$20.77)													
															Refund																	
															\$56.91																	
CASTRO-PINEDA, KARLA PATRICIA	CASTRO-PINEDA, KARLA PATRICIA		314 OLIVE BRANCH EXT		MARSHVILLE, NC 28103	Adjustment < \$100	0081114415	LEZ5854	PENDING	1047189519	Refund Generated due to adjustment on Bill #0081114415-2024-2024-0000	Situs error	8/21/2025		001	TAX	\$0.00	\$0.00	\$0.00													
															400	TAX	\$129.97	\$0.00	\$129.97													
															200	TAX	(\$118.74)	\$0.00	(\$118.74)													
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)													
															018	TAX	\$17.39	\$0.00	\$17.39													
															003	TAX	\$0.00	\$0.00	\$0.00													
															005	TAX	\$0.00	\$0.00	\$0.00													
															004	TAX	\$0.00	\$0.00	\$0.00													
															002	TAX	\$0.00	\$0.00	\$0.00													
															Refund																	
\$1.38																																
CASTRO-PINEDA, KARLA PATRICIA	CASTRO-PINEDA, KARLA PATRICIA		314 OLIVE BRANCH EXT		MARSHVILLE, NC 28103	Adjustment < \$100	0086881870	LFK8041	PENDING	1047495726	Refund Generated due to adjustment on Bill #0086881870-2024-2024-0000	Situs error	8/22/2025		001	TAX	\$0.00	\$0.00	\$0.00													
															400	TAX	\$42.03	\$3.36	\$45.39													
															200	TAX	(\$38.40)	(\$3.07)	(\$41.47)													
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)													
															018	TAX	\$5.62	\$0.45	\$6.07													
															003	TAX	\$0.00	\$0.00	\$0.00													
															005	TAX	\$0.00	\$0.00	\$0.00													
															004	TAX	\$0.00	\$0.00	\$0.00													
															002	TAX	\$0.00	\$0.00	\$0.00													
															Refund																	
\$20.01																																
CELIS MARRUFO, ORLANDO JOSE	CELIS MARRUFO, ORLANDO JOSE		101 SILVER GLENN LN		INDIAN TRAIL, NC 28079	Proration	0081107082	LEZ5437	AUTHORIZED	813947197	Refund Generated due to proration on Bill #0081107082-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$12.79)	\$0.00	(\$12.79)													
															600	TAX	(\$14.51)	\$0.00	(\$14.51)													
															020	TAX	(\$4.19)	\$0.00	(\$4.19)													
															003	TAX	(\$1.37)	\$0.00	(\$1.37)													
															005	TAX	(\$0.31)	\$0.00	(\$0.31)													
															004	TAX	(\$2.29)	\$0.00	(\$2.29)													
															002	TAX	(\$29.34)	\$0.00	(\$29.34)													
Refund																																
\$64.80																																
CENTENO GUTIERREZ, YOVANA	CENTENO GUTIERREZ, YOVANA		810 SCENIC WAY		MATTHEWS, NC 28104	Proration	0083001674	VDM6540	AUTHORIZED	813946189	Refund Generated due to proration on Bill #0083001674-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$4.69)	\$0.00	(\$4.69)													
															700	TAX	(\$6.21)	\$0.00	(\$6.21)													
															020	TAX	(\$1.54)	\$0.00	(\$1.54)													
															003	TAX	(\$0.51)	\$0.00	(\$0.51)													
															005	TAX	(\$0.11)	\$0.00	(\$0.11)													
															004	TAX	(\$0.84)	\$0.00	(\$0.84)													
															002	TAX	(\$10.77)	\$0.00	(\$10.77)													
Refund																																
\$24.67																																



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
COAN, WILLIAM BRADLEY	COAN, WILLIAM BRADLEY		6209 POTTER RD S		WAXHAW, NC 28173	Proration	0084705168	LJM8071	AUTHORIZED	695799294	Refund Generated due to proration on Bill #0084705168-2024-2024-0000-00	Vehicle Sold	8/6/2025	8/7/2025	001	TAX	(\$73.80)	\$0.00	(\$73.80)
															025	TAX	(\$22.70)	\$0.00	(\$22.70)
															003	TAX	(\$7.91)	\$0.00	(\$7.91)
															005	TAX	(\$1.76)	\$0.00	(\$1.76)
															004	TAX	(\$13.21)	\$0.00	(\$13.21)
															002	TAX	(\$169.21)	\$0.00	(\$169.21)
															Refund				
\$288.59																			
CORTEZZO, LOUIS FRANCIS II	CORTEZZO, LOUIS FRANCIS II		4304 OLDSTONE FOREST DR		WAXHAW, NC 28173	Proration	0074761543	KKP9082	AUTHORIZED	697043472	Refund Generated due to proration on Bill #0074761543-2024-2024-0000-00	Vehicle Totalled	8/14/2025	8/15/2025	001	TAX	(\$93.14)	\$0.00	(\$93.14)
															028	TAX	(\$29.85)	\$0.00	(\$29.85)
															003	TAX	(\$9.99)	\$0.00	(\$9.99)
															005	TAX	(\$2.22)	\$0.00	(\$2.22)
															004	TAX	(\$16.67)	\$0.00	(\$16.67)
															002	TAX	(\$213.57)	\$0.00	(\$213.57)
															Refund				
\$365.44																			
CORTEZZO, LOUIS FRANCIS II	CORTEZZO, LOUIS FRANCIS II		4304 OLDSTONE FOREST DR		WAXHAW, NC 28173	Proration	0072820718	KXC9998	AUTHORIZED	697225530	Refund Generated due to proration on Bill #0072820718-2023-2023-0000-00	Vehicle Sold	8/15/2025	8/18/2025	001	TAX	(\$31.85)	\$0.00	(\$31.85)
															028	TAX	(\$0.18)	\$0.00	(\$0.18)
															003	TAX	(\$3.41)	\$0.00	(\$3.41)
															005	TAX	(\$0.76)	\$0.00	(\$0.76)
															004	TAX	(\$5.70)	\$0.00	(\$5.70)
															002	TAX	(\$73.02)	\$0.00	(\$73.02)
															Refund				
\$122.92																			
COSTANZA, KENNETH GERALD	COSTANZA, KENNETH GERALD		1105 CHERRY LAUREL DR		WAXHAW, NC 28173	Proration	0050938261	PLV5970	AUTHORIZED	695799678	Refund Generated due to proration on Bill #0050938261-2024-2024-0000-00	Vehicle Sold	8/6/2025	8/7/2025	001	TAX	(\$29.46)	\$0.00	(\$29.46)
															026	TAX	(\$7.18)	\$0.00	(\$7.18)
															003	TAX	(\$3.16)	\$0.00	(\$3.16)
															005	TAX	(\$0.70)	\$0.00	(\$0.70)
															004	TAX	(\$5.27)	\$0.00	(\$5.27)
															002	TAX	(\$67.55)	\$0.00	(\$67.55)
															Refund				
\$113.32																			
COWICK, JASON ALLAN	COWICK, JASON ALLAN	HINSON, JENNIFER LYNN	321 MEADOWBROOK DR		MATTHEWS, NC 28104	Proration	0082358382	TJA8684	AUTHORIZED	815979535	Refund Generated due to proration on Bill #0082358382-2024-2024-0000-00	Vehicle Totalled	8/28/2025	8/29/2025	001	TAX	(\$9.10)	(\$0.46)	(\$9.56)
															700	TAX	(\$12.64)	(\$0.60)	(\$13.24)
															020	TAX	(\$2.98)	(\$0.15)	(\$3.13)
															003	TAX	(\$0.97)	(\$0.05)	(\$1.02)
															005	TAX	(\$0.22)	(\$0.01)	(\$0.23)
															004	TAX	(\$1.63)	(\$0.08)	(\$1.71)
															002	TAX	(\$20.85)	(\$1.04)	(\$21.89)
Refund																			
\$50.18																			
CRAINE, GIMEKA SADE	CRAINE, GIMEKA SADE		4904 WINDSONG WAY		WINGATE, NC 28174	Proration	0082730762	EEJ6189	AUTHORIZED	695225526	Refund Generated due to proration on Bill #0082730762-2024-2024-0000-00	Insurance Lapse	8/4/2025	8/5/2025	001	TAX	(\$16.97)	\$0.00	(\$16.97)
															022	TAX	(\$8.89)	\$0.00	(\$8.89)
															003	TAX	(\$1.82)	\$0.00	(\$1.82)
															005	TAX	(\$0.41)	\$0.00	(\$0.41)
															004	TAX	(\$3.83)	\$0.00	(\$3.83)
															002	TAX	(\$38.92)	\$0.00	(\$38.92)
															Refund				
\$70.04																			
CRAWNER, KEVIN LEE	CRAWNER, KEVIN LEE	CRAWNER, SHANNA LEA	4057 SHADOWBROOK RD		WAXHAW, NC 28173	Proration	0068628209	PMX6820	AUTHORIZED	928856112	Refund Generated due to proration on Bill #0068628209-2024-2024-0000-00	Vehicle Sold	8/12/2025	8/13/2025	001	TAX	(\$14.43)	\$0.00	(\$14.43)
															500	TAX	(\$34.05)	\$0.00	(\$34.05)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$4.62)	\$0.00	(\$4.62)
															003	TAX	(\$1.55)	\$0.00	(\$1.55)
															005	TAX	(\$0.34)	\$0.00	(\$0.34)
															004	TAX	(\$2.58)	\$0.00	(\$2.58)
002	TAX	(\$33.10)	\$0.00	(\$33.10)															
Refund																			
\$90.67																			
CRISPENS, WARREN EDWARD JR	CRISPENS, WARREN EDWARD JR		9809 INDIAN TRAIL FAIRVIEW	W	INDIAN TRAIL, NC 28079	Proration	0061800879	HFK5054	AUTHORIZED	814721201	Refund Generated due to proration on Bill #0061800879-2024-2024-0000-00	Vehicle Sold	8/22/2025	8/25/2025	001	TAX	(\$9.74)	\$0.00	(\$9.74)
															930	TAX	(\$1.19)	\$0.00	(\$1.19)
															016	TAX	(\$3.61)	\$0.00	(\$3.61)
															003	TAX	(\$1.04)	\$0.00	(\$1.04)
															005	TAX	(\$0.23)	\$0.00	(\$0.23)
															004	TAX	(\$1.74)	\$0.00	(\$1.74)
															002	TAX	(\$22.33)	\$0.00	(\$22.33)
Refund																			
\$39.88																			
CROFT, MICHAEL EDMUND	CROFT, MICHAEL EDMUND	CROFT, BENNETT EDMUND	1003 FAIRBANKS CT		INDIAN TRAIL, NC 28079	Proration	0081221257	RDL9218	AUTHORIZED	813947330	Refund Generated due to proration on Bill #0081221257-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$33.42)	\$0.00	(\$33.42)
															600	TAX	(\$37.89)	\$0.00	(\$37.89)
															023	TAX	(\$10.49)	\$0.00	(\$10.49)
															003	TAX	(\$3.58)	\$0.00	(\$3.58)
															005	TAX	(\$0.80)	\$0.00	(\$0.80)
															004	TAX	(\$5.98)	\$0.00	(\$5.98)
															002	TAX	(\$76.64)	\$0.00	(\$76.64)
Refund																			
\$168.80																			
CROWDER, RHONDA GENE	CROWDER, RHONDA GENE		909 BELTON ST		MONROE, NC 28110	Proration	0082434755	LDYAGGIE	AUTHORIZED	813429981	Refund Generated due to proration on Bill #0082434755-2024-2024-0000-00	Vehicle Sold	8/15/2025	8/18/2025	001	TAX	(\$16.58)	\$0.00	(\$16.58)
															200	TAX	(\$51.07)	\$0.00	(\$51.07)
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															003	TAX	(\$1.78)	\$0.00	(\$1.78)
															005	TAX	(\$0.40)	\$0.00	(\$0.40)
															004	TAX	(\$2.97)	\$0.00	(\$2.97)
															002	TAX	(\$38.02)	\$0.00	(\$38.02)
Refund																			
\$110.82																			



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
CUKRO, JUSTIN EREN	CUKRO, JUSTIN EREN		3217 SECREST SHORTCUT RD	MONROE, NC 28110	Proration	0085790567	LKCS438	AUTHORIZED	699676752	Refund Generated due to proration on Bill #0085790567-2025-2025-0000-00	Vehicle Sold	8/29/2025	9/2/2025	001	TAX	(\$6.99)	\$0.00	(\$6.99)	
														021	TAX	(\$3.36)	\$0.00	(\$3.36)	
														003	TAX	(\$0.66)	\$0.00	(\$0.66)	
														005	TAX	(\$0.28)	\$0.00	(\$0.28)	
														004	TAX	(\$2.42)	\$0.00	(\$2.42)	
														002	TAX	(\$16.66)	\$0.00	(\$16.66)	
Refund																	\$30.37		
CULLY, PEGGY MARIE	CULLY, PEGGY MARIE		6000 HEMLOCK DR	INDIAN TRAIL, NC 28079	Proration	0028276325	TE39044	AUTHORIZED	816290447	Refund Generated due to proration on Bill #0028276325-2024-2024-0000-00	Vehicle Totalled	8/29/2025	9/2/2025	001	TAX	(\$10.10)	\$0.00	(\$10.10)	
														700	TAX	(\$13.36)	\$0.00	(\$13.36)	
														023	TAX	(\$3.17)	\$0.00	(\$3.17)	
														003	TAX	(\$1.08)	\$0.00	(\$1.08)	
														005	TAX	(\$0.24)	\$0.00	(\$0.24)	
														004	TAX	(\$1.81)	\$0.00	(\$1.81)	
002	TAX	(\$23.15)	\$0.00	(\$23.15)															
Refund																	\$52.94		
CUMMINGS, DAVID ELWIN	CUMMINGS, DAVID ELWIN		1021 MALLARD LANDING DR	MONROE, NC 28110	Proration	0086485174	9B57DV	AUTHORIZED	813989659	Refund Generated due to proration on Bill #0086485174-2025-2025-0000-00	Vehicle Sold	8/19/2025	8/20/2025	001	TAX	(\$10.16)	(\$1.31)	(\$19.47)	
														200	TAX	(\$71.10)	(\$5.16)	(\$76.26)	
														200	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
														003	TAX	(\$1.71)	(\$0.13)	(\$1.84)	
														005	TAX	(\$0.72)	(\$0.06)	(\$0.78)	
														004	TAX	(\$6.28)	(\$0.45)	(\$6.73)	
002	TAX	(\$43.27)	(\$3.13)	(\$46.40)															
Refund																	\$151.48		
CURTIS, CHARLES MICHAEL	CURTIS, CHARLES MICHAEL		15 OLD STAGE TRL	CLOVER, SC 29710	Proration	0076092194	VCM2915	AUTHORIZED	931794416	Refund Generated due to proration on Bill #0076092194-2024-2024-0000-00	Reg. Out of state	8/26/2025	8/27/2025	001	TAX	(\$6.80)	\$0.00	(\$6.80)	
														101	TAX	(\$3.33)	\$0.00	(\$3.33)	
														101	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
														026	TAX	(\$1.66)	\$0.00	(\$1.66)	
														003	TAX	(\$0.73)	\$0.00	(\$0.73)	
														005	TAX	(\$0.16)	\$0.00	(\$0.16)	
004	TAX	(\$1.22)	\$0.00	(\$1.22)															
002	TAX	(\$15.59)	\$0.00	(\$15.59)															
Refund																	\$29.49		
CURTIS, CHARLES MICHAEL	CURTIS, CHARLES MICHAEL		15 OLD STAGE TRL	CLOVER, SC 29710	Proration	0064902694	0075CL	AUTHORIZED	931794424	Refund Generated due to proration on Bill #0064902694-2024-2024-0000-00	Reg. Out of state	8/26/2025	8/27/2025	001	TAX	(\$15.35)	\$0.00	(\$15.35)	
														101	TAX	(\$7.53)	\$0.00	(\$7.53)	
														101	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
														026	TAX	(\$3.74)	\$0.00	(\$3.74)	
														003	TAX	(\$1.64)	\$0.00	(\$1.64)	
														005	TAX	(\$0.36)	\$0.00	(\$0.36)	
004	TAX	(\$2.75)	\$0.00	(\$2.75)															
002	TAX	(\$35.21)	\$0.00	(\$35.21)															
Refund																	\$66.58		
CURTIS, CHARLES MICHAEL	CURTIS, CHARLES MICHAEL		15 OLD STAGE TRL	CLOVER, SC 29710	Proration	0066965295	NZM0213	AUTHORIZED	931794440	Refund Generated due to proration on Bill #0066965295-2024-2024-0000-00	Reg. Out of state	8/26/2025	8/27/2025	001	TAX	(\$8.44)	\$0.00	(\$8.44)	
														101	TAX	(\$4.14)	\$0.00	(\$4.14)	
														101	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
														026	TAX	(\$2.06)	\$0.00	(\$2.06)	
														003	TAX	(\$0.91)	\$0.00	(\$0.91)	
														005	TAX	(\$0.20)	\$0.00	(\$0.20)	
004	TAX	(\$1.51)	\$0.00	(\$1.51)															
002	TAX	(\$19.36)	\$0.00	(\$19.36)															
Refund																	\$36.62		
DEESE, ASHLEY DIANE	DEESE, ASHLEY DIANE		431 E SANDY RIDGE RD	MONROE, NC 28112	Proration	0063582809	PLH3508	AUTHORIZED	696839382	Refund Generated due to proration on Bill #0063582809-2024-2024-0000-00	Vehicle Sold	8/13/2025	8/14/2025	001	TAX	(\$19.51)	\$0.00	(\$19.51)	
														014	TAX	(\$6.07)	\$0.00	(\$6.07)	
														003	TAX	(\$2.09)	\$0.00	(\$2.09)	
														005	TAX	(\$0.46)	\$0.00	(\$0.46)	
														004	TAX	(\$3.49)	\$0.00	(\$3.49)	
														002	TAX	(\$44.73)	\$0.00	(\$44.73)	
Refund																	\$76.35		
DEFILIPPO, JOSEPH ERNEST	DEFILIPPO, JOSEPH ERNEST		1009 BACK STRETCH BLVD	INDIAN TRAIL, NC 28079	Proration	0069964503	FEM136	AUTHORIZED	813947764	Refund Generated due to proration on Bill #0069964503-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$15.01)	\$0.00	(\$15.01)	
														600	TAX	(\$17.01)	\$0.00	(\$17.01)	
														023	TAX	(\$4.71)	\$0.00	(\$4.71)	
														003	TAX	(\$1.61)	\$0.00	(\$1.61)	
														005	TAX	(\$0.36)	\$0.00	(\$0.36)	
														004	TAX	(\$2.69)	\$0.00	(\$2.69)	
002	TAX	(\$34.40)	\$0.00	(\$34.40)															
Refund																	\$75.78		
DOLAN, THOMAS MICHAEL	DOLAN, THOMAS MICHAEL	DOLAN, MARY ROGERS	10033 PERSIMMON CREEK DR	MINT HILL, NC 28227	Proration	0036918563	EDL4067	AUTHORIZED	698847018	Refund Generated due to proration on Bill #0036918563-2024-2024-0000-00	Vehicle Sold	8/26/2025	8/27/2025	001	TAX	(\$6.61)	\$0.00	(\$6.61)	
														016	TAX	(\$2.45)	\$0.00	(\$2.45)	
														003	TAX	(\$0.71)	\$0.00	(\$0.71)	
														005	TAX	(\$0.16)	\$0.00	(\$0.16)	
														004	TAX	(\$1.18)	\$0.00	(\$1.18)	
														002	TAX	(\$15.16)	\$0.00	(\$15.16)	
Refund																	\$26.27		



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change															
DONNELL, DALE RAY	DONNELL, DALE RAY	DONNELL, TRACY JOETTA	9913 JACK NICKLAUS DR		LANCASTER, SC 29720	Proration	0071521485	TMK5077	AUTHORIZED	929120168	Refund Generated due to proration on Bill #0071521485-2024-2024-0000-00	Vehicle Sold	8/13/2025	8/14/2025	001	TAX	(\$6.94)	\$0.00	(\$6.94)															
															500	TAX	(\$16.37)	\$0.00	(\$16.37)															
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00															
															028	TAX	(\$2.23)	\$0.00	(\$2.23)															
															003	TAX	(\$0.74)	\$0.00	(\$0.74)															
															005	TAX	(\$0.16)	\$0.00	(\$0.16)															
															004	TAX	(\$1.24)	\$0.00	(\$1.24)															
															002	TAX	(\$15.91)	\$0.00	(\$15.91)															
															Refund																			
															\$43.59																			
DONNELL, DALE RAY	DONNELL, DALE RAY		9913 JACK NICKLAUS DR		LANCASTER, SC 29720	Proration	0083161978	TMZ8248	AUTHORIZED	929120208	Refund Generated due to proration on Bill #0083161978-2024-2024-0000-00	Reg. Out of state	8/13/2025	8/14/2025	001	TAX	(\$8.59)	\$0.00	(\$8.59)															
															500	TAX	(\$20.25)	\$0.00	(\$20.25)															
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00															
															028	TAX	(\$2.75)	\$0.00	(\$2.75)															
															003	TAX	(\$0.92)	\$0.00	(\$0.92)															
															005	TAX	(\$0.21)	\$0.00	(\$0.21)															
															004	TAX	(\$1.53)	\$0.00	(\$1.53)															
															002	TAX	(\$19.68)	\$0.00	(\$19.68)															
															Refund																			
															\$53.93																			
DONNELL, DALE RAY	DONNELL, DALE RAY	DONNELL, TRACY JOETTA	9913 JACK NICKLAUS DR		LANCASTER, SC 29720	Proration	0071078112	TMZ8249	AUTHORIZED	929120232	Refund Generated due to proration on Bill #0071078112-2024-2024-0000-00	Reg. Out of state	8/13/2025	8/14/2025	001	TAX	(\$17.99)	\$0.00	(\$17.99)															
															500	TAX	(\$42.43)	\$0.00	(\$42.43)															
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00															
															028	TAX	(\$5.77)	\$0.00	(\$5.77)															
															003	TAX	(\$1.93)	\$0.00	(\$1.93)															
															005	TAX	(\$0.43)	\$0.00	(\$0.43)															
															004	TAX	(\$3.22)	\$0.00	(\$3.22)															
															002	TAX	(\$41.24)	\$0.00	(\$41.24)															
															Refund																			
															\$113.01																			
DONNELL, TRACY JOETTA	DONNELL, TRACY JOETTA	DONNELL, DALE RAY	9913 JACK NICKLAUS DR		LANCASTER, SC 29720	Proration	0071078034	TMZ8247	AUTHORIZED	929120264	Refund Generated due to proration on Bill #0071078034-2024-2024-0000-00	Reg. Out of state	8/13/2025	8/14/2025	001	TAX	(\$29.32)	\$0.00	(\$29.32)															
															500	TAX	(\$69.17)	\$0.00	(\$69.17)															
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00															
															028	TAX	(\$9.39)	\$0.00	(\$9.39)															
															003	TAX	(\$3.15)	\$0.00	(\$3.15)															
															005	TAX	(\$0.70)	\$0.00	(\$0.70)															
															004	TAX	(\$5.25)	\$0.00	(\$5.25)															
															002	TAX	(\$67.23)	\$0.00	(\$67.23)															
															Refund																			
															\$184.21																			
DUNLEAVY, LISA ALEXIS	DUNLEAVY, LISA ALEXIS		5343 SHANNAMARA DR		MATTHEWS, NC 28104	Proration	0059993589	HJT9129	AUTHORIZED	812979258	Refund Generated due to proration on Bill #0059993589-2024-2024-0000-00	Vehicle Sold	8/13/2025	8/14/2025	001	TAX	(\$9.61)	\$0.00	(\$9.61)															
															700	TAX	(\$12.71)	\$0.00	(\$12.71)															
															023	TAX	(\$3.02)	\$0.00	(\$3.02)															
															003	TAX	(\$1.03)	\$0.00	(\$1.03)															
															005	TAX	(\$0.23)	\$0.00	(\$0.23)															
															004	TAX	(\$1.71)	\$0.00	(\$1.71)															
															002	TAX	(\$22.02)	\$0.00	(\$22.02)															
															Refund																			
															\$50.33																			
															DURHAM COUNTY TAX ADMINISTRATION	HUTCHINS, JAMES EARL		PO BOX 3397		DURHAM, NC 27702	Proration	0086638921	HMW3579	AUTHORIZED	811992832	Refund Generated due to proration on Bill #0086638921-2025-2025-0000-00	Other Errors	8/7/2025	8/8/2025	001	TAX	(\$9.33)	\$0.00	(\$9.33)
200	TAX	(\$36.52)	\$0.00	(\$36.52)																														
200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)																														
003	TAX	(\$0.88)	\$0.00	(\$0.88)																														
005	TAX	(\$0.37)	\$0.00	(\$0.37)																														
004	TAX	(\$3.23)	\$0.00	(\$3.23)																														
002	TAX	(\$22.23)	\$0.00	(\$22.23)																														
Refund																																		
\$102.56																																		
EDDIE, DONALD EUGENE	EDDIE, DONALD EUGENE		808 SANLEE DR		MONROE, NC 28110	Adjustment < \$100	0081318318	KCV3383	PENDING	930836888	Refund Generated due to adjustment on Bill #0081318318-2024-2024-0000	Situs error	8/21/2025																	001	TAX	\$0.00	\$0.00	\$0.00
															200	TAX	(\$3.67)	\$0.00	(\$3.67)															
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)															
															022	TAX	\$0.62	\$0.00	\$0.62															
															003	TAX	\$0.00	\$0.00	\$0.00															
															005	TAX	\$0.00	\$0.00	\$0.00															
															004	TAX	\$0.00	\$0.00	\$0.00															
															002	TAX	\$0.00	\$0.00	\$0.00															
															Refund																			
															\$33.05																			
EDWARDS WOOD PRODUCTS INC TRANSPORTATION	EDWARDS WOOD PRODUCTS INC TRANSPORTATION		PO BOX 249		MARSHVILLE, NC 28103	Proration	0086713630	YA111343	AUTHORIZED	699160350	Refund Generated due to proration on Bill #0086713630-2025-2025-0000-00	Vehicle Totalled	8/27/2025	8/28/2025	001	TAX	(\$8.58)	\$0.00	(\$8.58)															
															018	TAX	(\$5.11)	\$0.00	(\$5.11)															
															003	TAX	(\$0.81)	\$0.00	(\$0.81)															
															005	TAX	(\$0.34)	\$0.00	(\$0.34)															
															004	TAX	(\$2.97)	\$0.00	(\$2.97)															
															002	TAX	(\$20.43)	\$0.00	(\$20.43)															
															Refund																			
															\$38.24																			
															ENTINU COMMUNICATION 5 LLC	ENTINU COMMUNICATION 5 LLC		4040 MATTHEWS-INDIAN TRL	ROAD	MATTHEWS, NC 28104	Adjustment < \$100	0081049593	LEZ5707	PENDING	1047190104	Refund Generated due to adjustment on Bill #0081049593-2024-2024-0000	Situs error	8/21/2025		001	TAX	\$0.00	\$0.00	\$0.00
																														600	TAX	\$33.52	\$0.00	\$33.52
200	TAX	(\$91.05)	\$0.00	(\$91.05)																														
200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)																														
020	TAX	\$9.69	\$0.00	\$9.69																														
003	TAX	\$0.00	\$0.00	\$0.00																														
005	TAX	\$0.00	\$0.00	\$0.00																														
004	TAX	\$0.00	\$0.00	\$0.00																														
002	TAX	\$0.00	\$0.00	\$0.00																														
Refund																																		
\$77.84																																		



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
FARMER, BRET WILLIAM	FARMER, BRET WILLIAM	FARMER, BARBARA BETH	6604 OLD RIDGE RD		WAXHAM, NC 28173	Proration	0047562713	FMZ8653	AUTHORIZED	698844330	Refund Generated due to proration on Bill #0047562713-2024-2024-0000-00	Vehicle Sold	8/25/2025	8/26/2025	001	TAX	(\$3.79)	\$0.00	(\$3.79)
															028	TAX	(\$1.21)	\$0.00	(\$1.21)
															003	TAX	(\$0.40)	\$0.00	(\$0.40)
															005	TAX	(\$0.09)	\$0.00	(\$0.09)
															004	TAX	(\$0.68)	\$0.00	(\$0.68)
															002	TAX	(\$8.70)	\$0.00	(\$8.70)
Refund																	\$14.87		
FEHELEY, JOSEPH DANIEL	FEHELEY, JOSEPH DANIEL		1292 RESTORATION DR		MARVIN, NC 28173	Proration	0035758952	PDH4085	AUTHORIZED	927004400	Refund Generated due to proration on Bill #0035758952-2024-2024-0000-00	Vehicle Sold	8/5/2025	8/6/2025	001	TAX	(\$20.25)	\$0.00	(\$20.25)
															101	TAX	(\$9.92)	\$0.00	(\$9.92)
															101	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															026	TAX	(\$4.94)	\$0.00	(\$4.94)
															003	TAX	(\$2.17)	\$0.00	(\$2.17)
															005	TAX	(\$0.48)	\$0.00	(\$0.48)
004	TAX	(\$3.62)	\$0.00	(\$3.62)															
002	TAX	(\$46.43)	\$0.00	(\$46.43)															
Refund																	\$87.81		
FLEMING, GORDON	FLEMING, GORDON		7142 WEDDINGTON BROOK DR		MATTHEWS, NC 28104	Proration	0016626025	TFY6374	AUTHORIZED	815321724	Refund Generated due to proration on Bill #0016626025-2024-2024-0000-00	Vehicle Sold	8/26/2025	8/27/2025	001	TAX	(\$7.01)	\$0.00	(\$7.01)
															000	TAX	(\$1.07)	\$0.00	(\$1.07)
															026	TAX	(\$1.71)	\$0.00	(\$1.71)
															003	TAX	(\$0.75)	\$0.00	(\$0.75)
															005	TAX	(\$0.16)	\$0.00	(\$0.16)
															004	TAX	(\$1.25)	\$0.00	(\$1.25)
002	TAX	(\$16.08)	\$0.00	(\$16.08)															
Refund																	\$28.03		
FLUDD, JOHNNY LEE	FLUDD, JOHNNY LEE		2018 BRIDLESIDE DR		INDIAN TRAIL, NC 28079	Proration	0075795815	JAY4315	AUTHORIZED	813947309	Refund Generated due to proration on Bill #0075795815-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$43.64)	\$0.00	(\$43.64)
															000	TAX	(\$49.47)	\$0.00	(\$49.47)
															019	TAX	(\$17.06)	\$0.00	(\$17.06)
															003	TAX	(\$4.68)	\$0.00	(\$4.68)
															005	TAX	(\$1.04)	\$0.00	(\$1.04)
															004	TAX	(\$7.81)	\$0.00	(\$7.81)
002	TAX	(\$100.06)	\$0.00	(\$100.06)															
Refund																	\$223.76		
FOARD, BRITNEY LAUREN	FOARD, BRITNEY LAUREN		7921 INDIAN TL FAIRVIEW RD		INDIAN TRAIL, NC 28079	Adjustment < \$100	0081047754	LF37756	PENDING	1047192021	Refund Generated due to adjustment on Bill #0081047754-2024-2024-0000	Situs error	8/21/2025		001	TAX	\$0.00	\$0.00	\$0.00
															000	TAX	\$14.70	\$0.00	\$14.70
															200	TAX	(\$39.92)	\$0.00	(\$39.92)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															023	TAX	\$4.07	\$0.00	\$4.07
															003	TAX	\$0.00	\$0.00	\$0.00
005	TAX	\$0.00	\$0.00	\$0.00															
004	TAX	\$0.00	\$0.00	\$0.00															
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$51.15		
FOSTER, IRIS ANNI	FOSTER, IRIS ANNI		7012 FARM POND RD		INDIAN TRAIL, NC 28079	Proration	0080757094	REV3919	AUTHORIZED	812981302	Refund Generated due to proration on Bill #0080757094-2024-2024-0000-00	Vehicle Sold	8/13/2025	8/14/2025	001	TAX	(\$23.25)	\$0.00	(\$23.25)
															000	TAX	(\$26.35)	\$0.00	(\$26.35)
															023	TAX	(\$7.29)	\$0.00	(\$7.29)
															003	TAX	(\$2.49)	\$0.00	(\$2.49)
															005	TAX	(\$0.55)	\$0.00	(\$0.55)
															004	TAX	(\$4.16)	\$0.00	(\$4.16)
002	TAX	(\$53.30)	\$0.00	(\$53.30)															
Refund																	\$117.39		
FULLWOOD, DONAY VASHON	FULLWOOD, DONAY VASHON		1031 DANIA RD		INDIAN TRAIL, NC 28079	Proration	0057095598	EDF5499	AUTHORIZED	815320338	Refund Generated due to proration on Bill #0057095598-2024-2024-0000-00	Vehicle Sold	8/26/2025	8/27/2025	001	TAX	(\$21.00)	\$0.00	(\$21.00)
															000	TAX	(\$23.81)	\$0.00	(\$23.81)
															023	TAX	(\$6.59)	\$0.00	(\$6.59)
															003	TAX	(\$2.25)	\$0.00	(\$2.25)
															005	TAX	(\$0.50)	\$0.00	(\$0.50)
															004	TAX	(\$3.76)	\$0.00	(\$3.76)
002	TAX	(\$48.16)	\$0.00	(\$48.16)															
Refund																	\$106.07		
GANTZ, LOIS CANIPE	GANTZ, LOIS CANIPE		320 MEADOWBROOK DR		MATTHEWS, NC 28104	Proration	0079485845	DMY7026	AUTHORIZED	812214354	Refund Generated due to proration on Bill #0079485845-2024-2024-0000-00	Vehicle Sold	8/8/2025	8/12/2025	001	TAX	(\$5.48)	\$0.00	(\$5.48)
															700	TAX	(\$7.26)	\$0.00	(\$7.26)
															020	TAX	(\$1.00)	\$0.00	(\$1.00)
															003	TAX	(\$0.59)	\$0.00	(\$0.59)
															005	TAX	(\$0.13)	\$0.00	(\$0.13)
															004	TAX	(\$0.98)	\$0.00	(\$0.98)
002	TAX	(\$12.57)	\$0.00	(\$12.57)															
Refund																	\$28.81		
GAO, XIAOJIE	GAO, XIAOJIE		726 SKYTOP RD		WAXHAM, NC 28173	Proration	0076316388	REY1519	AUTHORIZED	812215152	Refund Generated due to proration on Bill #0076316388-2024-2024-0000-00	Vehicle Sold	8/8/2025	8/12/2025	001	TAX	(\$61.13)	(\$3.05)	(\$64.18)
															000	TAX	(\$9.37)	(\$0.47)	(\$9.84)
															026	TAX	(\$14.91)	(\$0.74)	(\$15.65)
															003	TAX	(\$6.56)	(\$0.32)	(\$6.88)
															005	TAX	(\$1.46)	(\$0.00)	(\$1.54)
															004	TAX	(\$10.94)	(\$0.55)	(\$11.49)
002	TAX	(\$140.17)	(\$7.01)	(\$147.18)															
Refund																	\$256.76		



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
GEDMAN, HEATHER MARIE	GEDMAN, HEATHER MARIE		942 BARON RD	WAXHAW, NC 28173	Proration	0075805271	K8D2829	AUTHORIZED	814720795	Refund Generated due to proration on Bill #0075805271-2024-2024-0000-00	Vehicle Sold	8/22/2025	8/25/2025	001	TAX	(\$37.97)	\$0.00	(\$37.97)	
														800	TAX	(\$5.82)	\$0.00	(\$5.82)	
														026	TAX	(\$9.26)	\$0.00	(\$9.26)	
														003	TAX	(\$4.07)	\$0.00	(\$4.07)	
														005	TAX	(\$0.91)	\$0.00	(\$0.91)	
														004	TAX	(\$6.79)	\$0.00	(\$6.79)	
														002	TAX	(\$87.07)	\$0.00	(\$87.07)	
Refund																	\$151.89		
GHUMMAN, MUHAMMAD RAFAY	GHUMMAN, MUHAMMAD RAFAY		4444 FAMILY TRAIL DR	INDIAN LAND, SC 29707	Proration	0082183851	LFF4141	AUTHORIZED	812979867	Refund Generated due to proration on Bill #0082183851-2024-2024-0000-00	Reg. Out of state	8/13/2025	8/14/2025	001	TAX	(\$6.62)	\$0.00	(\$6.62)	
														200	TAX	(\$20.40)	\$0.00	(\$20.40)	
														200	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
														003	TAX	(\$0.71)	\$0.00	(\$0.71)	
														005	TAX	(\$0.16)	\$0.00	(\$0.16)	
														004	TAX	(\$1.19)	\$0.00	(\$1.19)	
														002	TAX	(\$15.20)	\$0.00	(\$15.20)	
Refund																	\$44.28		
GLIBITSKAYA, LYUSYA	GLIBITSKAYA, LYUSYA		4110 HUNTERS TRAIL DR	INDIAN TRAIL, NC 28079	Proration	0079688683	LCX042	AUTHORIZED	813217013	Refund Generated due to proration on Bill #0079688683-2024-2024-0000-00	Vehicle Sold	8/14/2025	8/15/2025	001	TAX	(\$11.16)	\$0.00	(\$11.16)	
														600	TAX	(\$12.65)	\$0.00	(\$12.65)	
														023	TAX	(\$3.50)	\$0.00	(\$3.50)	
														003	TAX	(\$1.20)	\$0.00	(\$1.20)	
														005	TAX	(\$0.27)	\$0.00	(\$0.27)	
														004	TAX	(\$1.99)	\$0.00	(\$1.99)	
														002	TAX	(\$25.58)	\$0.00	(\$25.58)	
Refund																	\$56.35		
GOPI, JIBEESH KUMAR	GOPI, JIBEESH KUMAR		1704 MILLBRIDGE PKWY	WAXHAW, NC 28173	Proration	0076906051	JDX9630	AUTHORIZED	932213816	Refund Generated due to proration on Bill #0076906051-2024-2024-0000-00	Vehicle Sold	8/27/2025	8/28/2025	001	TAX	(\$40.91)	\$0.00	(\$40.91)	
														500	TAX	(\$96.52)	\$0.00	(\$96.52)	
														500	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
														028	TAX	(\$13.11)	\$0.00	(\$13.11)	
														003	TAX	(\$4.39)	\$0.00	(\$4.39)	
														005	TAX	(\$0.98)	\$0.00	(\$0.98)	
														004	TAX	(\$7.32)	\$0.00	(\$7.32)	
002	TAX	(\$93.82)	\$0.00	(\$93.82)															
Refund																	\$257.05		
GRIFFIN, STEPHEN MCCAULEY	GRIFFIN, STEPHEN MCCAULEY		1504 BLACK WALNUT ST	MONROE, NC 28112	Proration	0083653591	VFC5847	AUTHORIZED	814480219	Refund Generated due to proration on Bill #0083653591-2024-2024-0000-00	Vehicle Sold	8/21/2025	8/22/2025	001	TAX	(\$56.04)	(\$3.23)	(\$59.27)	
														200	TAX	(\$172.54)	(\$9.92)	(\$182.46)	
														200	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
														003	TAX	(\$6.01)	(\$0.35)	(\$6.36)	
														005	TAX	(\$1.34)	(\$0.00)	(\$1.42)	
														004	TAX	(\$10.03)	(\$0.57)	(\$10.60)	
														002	TAX	(\$128.49)	(\$7.39)	(\$135.88)	
Refund																	\$395.99		
GUINTEHER, MIA RENEE	GUINTEHER, MIA RENEE	MORRELL, TIMOTHY PAUL	1008 HOLLYHEDGE LN	INDIAN TRAIL, NC 28079	Proration	0042711057	PJV9216	AUTHORIZED	814721068	Refund Generated due to proration on Bill #0042711057-2024-2024-0000-00	Vehicle Sold	8/22/2025	8/25/2025	001	TAX	(\$2.11)	\$0.00	(\$2.11)	
														600	TAX	(\$2.40)	\$0.00	(\$2.40)	
														020	TAX	(\$0.70)	\$0.00	(\$0.70)	
														003	TAX	(\$0.22)	\$0.00	(\$0.22)	
														005	TAX	(\$0.05)	\$0.00	(\$0.05)	
														004	TAX	(\$0.38)	\$0.00	(\$0.38)	
														002	TAX	(\$4.85)	\$0.00	(\$4.85)	
Refund																	\$0.71		
GUZINSKI, MAXWELL IAN	GUZINSKI, MAXWELL IAN		2620 WAXHAW MARVIN RD	WAXHAW, NC 28173	Proration	0081243567	KMB3624	AUTHORIZED	697669488	Refund Generated due to proration on Bill #0081243567-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$29.95)	\$0.00	(\$29.95)	
														026	TAX	(\$7.30)	\$0.00	(\$7.30)	
														003	TAX	(\$3.21)	\$0.00	(\$3.21)	
														005	TAX	(\$0.72)	\$0.00	(\$0.72)	
														004	TAX	(\$5.36)	\$0.00	(\$5.36)	
														002	TAX	(\$68.67)	\$0.00	(\$68.67)	
														Refund					
HABER, JONATHAN SCOTT	HABER, JONATHAN SCOTT		1308 HINSON FOREST RD	MONROE, NC 28110	Proration	0077504251	VCM1296	AUTHORIZED	697668942	Refund Generated due to proration on Bill #0077504251-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$11.90)	\$0.00	(\$11.90)	
														019	TAX	(\$4.65)	\$0.00	(\$4.65)	
														003	TAX	(\$1.27)	\$0.00	(\$1.27)	
														005	TAX	(\$0.28)	\$0.00	(\$0.28)	
														004	TAX	(\$2.12)	\$0.00	(\$2.12)	
														002	TAX	(\$27.28)	\$0.00	(\$27.28)	
														Refund					
HAMILTON, CEDRIC JAMAL	HAMILTON, CEDRIC JAMAL		3004 BOBWHITE CIR	WINGATE, NC 28174	Proration	0079872770	VB4510	AUTHORIZED	699411528	Refund Generated due to proration on Bill #0079872770-2024-2024-0000-00- PAY GAP Bill # 663360 DUE DATE 1/5/26	Vehicle Sold	8/28/2025	8/29/2025	001	TAX	(\$14.97)	\$0.00	(\$14.97)	
														022	TAX	(\$7.84)	\$0.00	(\$7.84)	
														003	TAX	(\$1.60)	\$0.00	(\$1.60)	
														005	TAX	(\$0.36)	\$0.00	(\$0.36)	
														004	TAX	(\$2.68)	\$0.00	(\$2.68)	
														002	TAX	(\$34.32)	\$0.00	(\$34.32)	
														Refund					
HAMILTON, JEREMY WILLIAM	HAMILTON, JEREMY WILLIAM		1506 SHINODA WAY	MONROE, NC 28110	Proration	0083039270	9K4722	AUTHORIZED	813947106	Refund Generated due to proration on Bill #0083039270-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$9.80)	\$0.00	(\$9.80)	
														900	TAX	(\$1.20)	\$0.00	(\$1.20)	
														021	TAX	(\$4.06)	\$0.00	(\$4.06)	
														003	TAX	(\$1.05)	\$0.00	(\$1.05)	
														005	TAX	(\$0.23)	\$0.00	(\$0.23)	
														004	TAX	(\$1.75)	\$0.00	(\$1.75)	
														002	TAX	(\$22.48)	\$0.00	(\$22.48)	
Refund																	\$40.57		



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change															
HARRIS, ANDREW ALAN	HARRIS, ANDREW ALAN	HARRIS, TRICIA NICOLE	4627 WATERBELL LN		WAXHAM, NC 28173	Proration	0084604634	LJL8624	AUTHORIZED	938559760	Refund Generated due to proration on Bill #0084604634-2024-2024-0000-00	Vehicle Sold	8/20/2025	8/21/2025	001	TAX	(\$5.11)	\$0.00	(\$5.11)															
															500	TAX	(\$12.04)	\$0.00	(\$12.04)															
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00															
															028	TAX	(\$1.63)	\$0.00	(\$1.63)															
															003	TAX	(\$0.55)	\$0.00	(\$0.55)															
															005	TAX	(\$0.12)	\$0.00	(\$0.12)															
															004	TAX	(\$0.91)	\$0.00	(\$0.91)															
															002	TAX	(\$11.70)	\$0.00	(\$11.70)															
															Refund																			
															\$32.06																			
HARRISON, MAMIE ELIZABETH	HARRISON, MAMIE ELIZABETH		1108 AFTERNOON SUN RD		STALLINGS, NC 28104	Proration	0052949981	HFV6236	AUTHORIZED	815684800	Refund Generated due to proration on Bill #0052949981-2024-2024-0000-00	Vehicle Sold	8/27/2025	8/28/2025	001	TAX	(\$7.04)	\$0.00	(\$7.04)															
															700	TAX	(\$9.32)	\$0.00	(\$9.32)															
															023	TAX	(\$2.21)	\$0.00	(\$2.21)															
															003	TAX	(\$0.75)	\$0.00	(\$0.75)															
															005	TAX	(\$0.17)	\$0.00	(\$0.17)															
															004	TAX	(\$1.26)	\$0.00	(\$1.26)															
															002	TAX	(\$16.14)	\$0.00	(\$16.14)															
															Refund																			
															\$36.89																			
															HEINZELMAN, ROBERT PATRICK	HEINZELMAN, ROBERT PATRICK		1031 MILESTONE CT		MONROE, NC 28110	Proration	0084329640	VN8666	AUTHORIZED	695995320	Refund Generated due to proration on Bill #0084329640-2024-2024-0000-00	Vehicle Sold	8/7/2025	8/8/2025	001	TAX	(\$85.17)	\$0.00	(\$85.17)
015	TAX	(\$28.81)	\$0.00	(\$28.81)																														
003	TAX	(\$9.13)	\$0.00	(\$9.13)																														
005	TAX	(\$2.03)	\$0.00	(\$2.03)																														
004	TAX	(\$15.24)	\$0.00	(\$15.24)																														
002	TAX	(\$195.28)	\$0.00	(\$195.28)																														
Refund																																		
\$335.66																																		
HENRY, NICHOLAS KEATON	HENRY, NICHOLAS KEATON	HENRY, KRISTI NORTHCUTT	1525 HASTY RD		MARSHVILLE, NC 28103	Proration	0081050386	RJV3572	AUTHORIZED	695225628	Refund Generated due to proration on Bill #0081050386-2024-2024-0000-00	Vehicle Sold	8/4/2025	8/5/2025																001	TAX	(\$13.89)	\$0.00	(\$13.89)
																														018	TAX	(\$6.26)	\$0.00	(\$6.26)
															003	TAX	(\$1.49)	\$0.00	(\$1.49)															
															005	TAX	(\$0.33)	\$0.00	(\$0.33)															
															004	TAX	(\$2.48)	\$0.00	(\$2.48)															
															002	TAX	(\$31.84)	\$0.00	(\$31.84)															
															Refund																			
															\$56.29																			
															HERMAN, TONY EUGENE	HERMAN, TONY EUGENE		600 E PARK DR		MONROE, NC 28112	Proration	0061145336	TDM8672	AUTHORIZED	815320289	Refund Generated due to proration on Bill #0061145336-2023-2023-0000-00	Vehicle Sold	8/26/2025	8/27/2025	001	TAX	(\$4.99)	\$0.00	(\$4.99)
																														200	TAX	(\$15.37)	\$0.00	(\$15.37)
200	VEHICLE FEE	\$0.00	\$0.00	\$0.00																														
003	TAX	(\$0.53)	\$0.00	(\$0.53)																														
005	TAX	(\$0.12)	\$0.00	(\$0.12)																														
004	TAX	(\$0.89)	\$0.00	(\$0.89)																														
002	TAX	(\$11.45)	\$0.00	(\$11.45)																														
Refund																																		
\$33.35																																		
HERNDON, MARK BRANDON	HERNDON, MARK BRANDON	HERNDON, STACEY ANN	3525 HONEYSUCKLE DR		WEDDINGTON, NC 28104	Adjustment < \$100	0077176318	KJV3928	PENDING	811128367	Refund Generated due to adjustment on Bill #0077176318-2024-2024-0000-00	Over Assessment	8/5/2025																	001	TAX	(\$12.76)	\$0.00	(\$12.76)
															000	TAX	(\$1.95)	\$0.00	(\$1.95)															
															026	TAX	(\$3.12)	\$0.00	(\$3.12)															
															003	TAX	(\$1.37)	\$0.00	(\$1.37)															
															005	TAX	(\$0.31)	\$0.00	(\$0.31)															
															004	TAX	(\$2.28)	\$0.00	(\$2.28)															
															002	TAX	(\$29.27)	\$0.00	(\$29.27)															
															Refund																			
															\$51.06																			
															HICKS, ANTOINE DESEAN	HICKS, ANTOINE DESEAN	HICKS, AMBER LATRIECE	5125 LAWYERS RD E		WINGATE, NC 28174	Adjustment < \$100	0085721733	LKV6870	PENDING	698330478	Refund Generated due to adjustment on Bill #0085721733-2024-2024-0000-00	Military	8/22/2025		001	TAX	(\$13.51)	\$0.00	(\$13.51)
017	TAX	(\$4.86)	\$0.00	(\$4.86)																														
003	TAX	(\$1.45)	\$0.00	(\$1.45)																														
005	TAX	(\$0.33)	\$0.00	(\$0.33)																														
004	TAX	(\$2.41)	\$0.00	(\$2.41)																														
002	TAX	(\$30.96)	\$0.00	(\$30.96)																														
Refund																																		
\$53.52																																		
HOLDER, RICHARD DARIO	HOLDER, RICHARD DARIO		9839 SEDGEFIELD DR		WAXHAM, NC 28173	Proration	0079406948	KLH5253	AUTHORIZED	698330610	Refund Generated due to proration on Bill #0079406948-2024-2024-0000-00	Vehicle Sold	8/22/2025	8/25/2025																001	TAX	(\$12.64)	\$0.00	(\$12.64)
																														026	TAX	(\$3.08)	\$0.00	(\$3.08)
															003	TAX	(\$1.36)	\$0.00	(\$1.36)															
															005	TAX	(\$0.30)	\$0.00	(\$0.30)															
															004	TAX	(\$2.26)	\$0.00	(\$2.26)															
															002	TAX	(\$28.99)	\$0.00	(\$28.99)															
															Refund																			
															\$48.63																			
															HOOPAUGH GRADING CO LLC	HOOPAUGH GRADING CO LLC		4006 VAN DYKE CT		MONROE, NC 28110	Adjustment < \$100	0068469736	JF3916	PENDING	697919262	Refund Generated due to adjustment on Bill #0068469736-2025-2025-0000-00	Over Assessment	8/20/2025		001	TAX	(\$7.92)	\$0.00	(\$7.92)
																														023	TAX	(\$3.01)	\$0.00	(\$3.01)
003	TAX	(\$0.75)	\$0.00	(\$0.75)																														
005	TAX	(\$0.32)	\$0.00	(\$0.32)																														
004	TAX	(\$2.74)	\$0.00	(\$2.74)																														
002	TAX	(\$18.87)	\$0.00	(\$18.87)																														
Refund																																		
\$33.61																																		
HOOPAUGH GRADING CO LLC	HOOPAUGH GRADING CO LLC		4006 VAN DYKE CT		MONROE, NC 28110	Adjustment < \$100	0068469592	FJL7296	PENDING	697919268	Refund Generated due to adjustment on Bill #0068469592-2025-2025-0000-00	Over Assessment	8/20/2025																	001	TAX	(\$2.15)	\$0.00	(\$2.15)
																														023	TAX	(\$0.82)	\$0.00	(\$0.82)
															003	TAX	(\$0.20)	\$0.00	(\$0.20)															
															005	TAX	(\$0.09)	\$0.00	(\$0.09)															
															004	TAX	(\$0.75)	\$0.00	(\$0.75)															
															002	TAX	(\$5.11)	\$0.00	(\$5.11)															
															Refund																			
															\$9.12																			



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
HOOPAUGH GRADING CO LLC	HOOPAUGH GRADING CO LLC		4006 VAN DYKE CT		MONROE, NC 28110	Adjustment < \$100	0068380710	FJL7297	PENDING	697919274	Refund Generated due to adjustment on Bill #0068380710-2025-2025-0000-00	Over Assessment	8/20/2025		001	TAX	(\$6.90)	\$0.00	(\$6.90)
															023	TAX	(\$2.62)	\$0.00	(\$2.62)
															003	TAX	(\$0.65)	\$0.00	(\$0.65)
															005	TAX	(\$0.28)	\$0.00	(\$0.28)
															004	TAX	(\$2.39)	\$0.00	(\$2.39)
															002	TAX	(\$16.43)	\$0.00	(\$16.43)
Refund																	\$29.27		
HOOPAUGH GRADING CO LLC	HOOPAUGH GRADING CO LLC		4006 VAN DYKE CT		MONROE, NC 28110	Adjustment < \$100	0068966297	FJL7288	PENDING	697919280	Refund Generated due to adjustment on Bill #0068966297-2025-2025-0000-00	Over Assessment	8/20/2025		001	TAX	(\$2.41)	\$0.00	(\$2.41)
															023	TAX	(\$0.92)	\$0.00	(\$0.92)
															003	TAX	(\$0.23)	\$0.00	(\$0.23)
															005	TAX	(\$0.10)	\$0.00	(\$0.10)
															004	TAX	(\$0.84)	\$0.00	(\$0.84)
															002	TAX	(\$5.75)	\$0.00	(\$5.75)
Refund																	\$10.25		
HOPKINS, STEPHANIE ISABELLA	HOPKINS, STEPHANIE ISABELLA	HOPKINS, BLAKE ALAN	126 MADELINE CT		MONTGOMERY, TX 77316	Proration	0065469393	JMX6030	AUTHORIZED	931795272	Refund Generated due to proration on Bill #0065469393-2024-2024-0000-00	Reg. Out of state	8/26/2025	8/27/2025	001	TAX	(\$48.57)	\$0.00	(\$48.57)
															500	TAX	(\$114.58)	\$0.00	(\$114.58)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$15.56)	\$0.00	(\$15.56)
															003	TAX	(\$5.21)	\$0.00	(\$5.21)
															005	TAX	(\$1.16)	\$0.00	(\$1.16)
004	TAX	(\$8.69)	\$0.00	(\$8.69)															
002	TAX	(\$111.36)	\$0.00	(\$111.36)															
Refund																	\$305.13		
HOPKINS, STEPHANIE ISABELLA	HOPKINS, STEPHANIE ISABELLA	HOPKINS, BLAKE ALAN	126 MADELINE CT		MONTGOMERY, TX 77316	Proration	0071708847	KFA3541	AUTHORIZED	931795288	Refund Generated due to proration on Bill #0071708847-2024-2024-0000-00	Reg. Out of state	8/26/2025	8/27/2025	001	TAX	(\$35.47)	\$0.00	(\$35.47)
															500	TAX	(\$83.67)	\$0.00	(\$83.67)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$11.37)	\$0.00	(\$11.37)
															003	TAX	(\$3.81)	\$0.00	(\$3.81)
															005	TAX	(\$0.85)	\$0.00	(\$0.85)
004	TAX	(\$6.35)	\$0.00	(\$6.35)															
002	TAX	(\$81.33)	\$0.00	(\$81.33)															
Refund																	\$222.85		
HOUSEMAN, JASON DELANE	HOUSEMAN, JASON DELANE		2208 AUTUMN BLAZE CT		WAXHAW, NC 28173	Proration	0083537703	RKH8494	AUTHORIZED	812980511	Refund Generated due to proration on Bill #0083537703-2024-2024-0000-00	Vehicle Sold	8/13/2025	8/14/2025	001	TAX	(\$45.69)	\$0.00	(\$45.69)
															990	TAX	(\$5.88)	\$0.00	(\$5.88)
															015	TAX	(\$15.45)	\$0.00	(\$15.45)
															003	TAX	(\$4.90)	\$0.00	(\$4.90)
															005	TAX	(\$1.09)	\$0.00	(\$1.09)
															004	TAX	(\$8.17)	\$0.00	(\$8.17)
002	TAX	(\$104.75)	\$0.00	(\$104.75)															
Refund																	\$185.93		
HOUSEMAN, JASON DELANE	HOUSEMAN, JASON DELANE		2208 AUTUMN BLAZE CT		WAXHAW, NC 28173	Proration	0083537703	RKH8494	AUTHORIZED	812980511	Refund Generated due to proration on Bill #0083537703-2024-2024-0000-00	Vehicle Sold	8/13/2025	8/14/2025	001	TAX	(\$7.53)	(\$0.44)	(\$7.97)
															800	TAX	(\$1.15)	(\$0.07)	(\$1.22)
															026	TAX	(\$1.84)	(\$0.10)	(\$1.94)
															003	TAX	(\$0.81)	(\$0.05)	(\$0.86)
															005	TAX	(\$0.18)	(\$0.01)	(\$0.19)
															004	TAX	(\$1.35)	(\$0.08)	(\$1.43)
002	TAX	(\$17.26)	(\$0.99)	(\$18.25)															
Refund																	\$31.86		
HUERFANO, CARLOS EDUARDO	HUERFANO, CARLOS EDUARDO		8020 OAKMERE RD		WAXHAW, NC 28173	Adjustment < \$100	0086955834	VBC4150	PENDING	932901656	Refund Generated due to adjustment on Bill #0086955834-2025-2025-0000-00	Over Assessment	8/29/2025		001	TAX	(\$6.69)	\$0.00	(\$6.69)
															500	TAX	(\$17.26)	\$0.00	(\$17.26)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$2.74)	\$0.00	(\$2.74)
															003	TAX	(\$0.63)	\$0.00	(\$0.63)
															005	TAX	(\$0.26)	\$0.00	(\$0.26)
004	TAX	(\$2.32)	\$0.00	(\$2.32)															
002	TAX	(\$15.94)	\$0.00	(\$15.94)															
Refund																	\$45.84		
HUERFANO, CARLOS EDUARDO	HUERFANO, CARLOS EDUARDO		8020 OAKMERE RD		WAXHAW, NC 28173	Adjustment < \$100	0086955834	VBC4150	PENDING	932901656	Refund Generated due to adjustment on Bill #0086955834-2025-2025-0000-00	Over Assessment	8/29/2025		001	TAX	(\$80.07)	\$0.00	(\$80.07)
															700	TAX	(\$105.97)	\$0.00	(\$105.97)
															020	TAX	(\$26.25)	\$0.00	(\$26.25)
															003	TAX	(\$8.59)	\$0.00	(\$8.59)
															005	TAX	(\$1.91)	\$0.00	(\$1.91)
															004	TAX	(\$14.32)	\$0.00	(\$14.32)
002	TAX	(\$183.59)	\$0.00	(\$183.59)															
Refund																	\$420.70		
HUFFMAN, MURRAY BRENT	HUFFMAN, MURRAY BRENT		1024 KERRY GREENS DR		MATTHEWS, NC 28104	Proration	0084447110	VFC8140	AUTHORIZED	811767075	Refund Generated due to proration on Bill #0084447110-2024-2024-0000-00	Vehicle Sold	8/6/2025	8/7/2025	001	TAX	\$0.00	\$0.00	\$0.00
															600	TAX	\$37.00	\$2.13	\$39.13
															200	TAX	(\$100.49)	(\$5.78)	(\$106.27)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															020	TAX	\$10.70	\$0.61	\$11.31
															003	TAX	\$0.00	\$0.00	\$0.00
005	TAX	\$0.00	\$0.00	\$0.00															
004	TAX	\$0.00	\$0.00	\$0.00															
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$85.83		
HUFFMAN, MURRAY BRENT	HUFFMAN, MURRAY BRENT		1024 KERRY GREENS DR		MATTHEWS, NC 28104	Proration	0084447110	VFC8140	AUTHORIZED	811767075	Refund Generated due to proration on Bill #0084447110-2024-2024-0000-00	Vehicle Sold	8/6/2025	8/7/2025	001	TAX	\$0.00	\$0.00	\$0.00
															600	TAX	\$37.00	\$2.13	\$39.13
															200	TAX	(\$100.49)	(\$5.78)	(\$106.27)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															020	TAX	\$10.70	\$0.61	\$11.31
															003	TAX	\$0.00	\$0.00	\$0.00
005	TAX	\$0.00	\$0.00	\$0.00															
004	TAX	\$0.00	\$0.00	\$0.00															
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$85.83		
HILUKA, MELAT DEGEFA	HILUKA, MELAT DEGEFA		221 AYLENSBERY LN		INDIAN TRAIL, NC 28079	Adjustment < \$100	0080956405	RJV4950	PENDING	1047189204	Refund Generated due to adjustment on Bill #0080956405-2024-2024-0000-00	Situs error	8/21/2025		001	TAX	\$0.00	\$0.00	\$0.00
															600	TAX	\$37.00	\$2.13	\$39.13
															200	TAX	(\$100.49)	(\$5.78)	(\$106.27)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															020	TAX	\$10.70	\$0.61	\$11.31
															003	TAX	\$0.00	\$0.00	\$0.00
005	TAX	\$0.00	\$0.00	\$0.00															
004	TAX	\$0.00	\$0.00	\$0.00															
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$85.83		
HILUKA, MELAT DEGEFA	HILUKA, MELAT DEGEFA		221 AYLENSBERY LN		INDIAN TRAIL, NC 28079	Adjustment < \$100	0080956405	RJV4950	PENDING	1047189204	Refund Generated due to adjustment on Bill #0080956405-2024-2024-0000-00	Situs error	8/21/2025		001	TAX	\$0.00	\$0.00	\$0.00
															600	TAX	\$37.00	\$2.13	\$39.13
															200	TAX	(\$100.49)	(\$5.78)	(\$106.27)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															020	TAX	\$10.70	\$0.61	\$11.31
															003	TAX	\$0.00	\$0.00	\$0.00
005	TAX	\$0.00	\$0.00	\$0.00															
004	TAX	\$0.00	\$0.00	\$0.00															
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$85.83		



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change												
HYATT, KAREN MCGEE	HYATT, KAREN MCGEE		4615 LOVE MILL RD		MONROE, NC 28110	Proration	0082920016	VEW5534	AUTHORIZED	697704624	Refund Generated due to proration on Bill #0082920016-2024- 2024-0000-00	Vehicle Sold	8/19/2025	8/20/2025	001	TAX	(\$33.95)	\$0.00	(\$33.95)												
															021	TAX	(\$14.08)	\$0.00	(\$14.08)												
															003	TAX	(\$3.64)	\$0.00	(\$3.64)												
															005	TAX	(\$0.81)	\$0.00	(\$0.81)												
															004	TAX	(\$6.07)	\$0.00	(\$6.07)												
															002	TAX	(\$77.84)	\$0.00	(\$77.84)												
															Refund																
\$136.39																															
IANNETTO, JOSEPH CARMINE	IANNETTO, JOSEPH CARMINE	IANNETTO, JAKE ANDREW	5725 LINDLEY CRESCENT DR		INDIAN TRAIL, NC 28079	Proration	0083039908	RKA4303	AUTHORIZED	696839964	Refund Generated due to proration on Bill #0083039908-2024- 2024-0000-00	Vehicle Sold	8/13/2025	8/14/2025	001	TAX	(\$37.50)	\$0.00	(\$37.50)												
															026	TAX	(\$9.15)	\$0.00	(\$9.15)												
															003	TAX	(\$4.02)	\$0.00	(\$4.02)												
															005	TAX	(\$0.89)	\$0.00	(\$0.89)												
															004	TAX	(\$6.71)	\$0.00	(\$6.71)												
															002	TAX	(\$85.97)	\$0.00	(\$85.97)												
															Refund																
\$144.24																															
IANNONE, DEBORAH LEE	IANNONE, DEBORAH LEE		616 MILLTREE ST	D 21	MARSHVILLE, NC 28103	Adjustment < \$100	0083569837	RKJ9917	PENDING	1046502936	Refund Generated due to adjustment on Bill #0083569837- 2024-2024-0000	Situs error	8/18/2025		001	TAX	\$0.00	\$0.00	\$0.00												
															400	TAX	\$15.18	\$0.00	\$15.18												
															200	TAX	(\$13.87)	\$0.00	(\$13.87)												
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)												
															018	TAX	\$2.03	\$0.00	\$2.03												
															003	TAX	\$0.00	\$0.00	\$0.00												
															005	TAX	\$0.00	\$0.00	\$0.00												
															004	TAX	\$0.00	\$0.00	\$0.00												
															002	TAX	\$0.00	\$0.00	\$0.00												
															Refund																
\$26.66																															
IBRAHIMOV, TURAL	IBRAHIMOV, TURAL		4630 OLD CHARLOTTE HWY	APT#5304	MONROE, NC 28110	Proration	0086573930	CARAZ1	AUTHORIZED	699676848	Refund Generated due to proration on Bill #0086573930-2025- 2025-0000-00	Vehicle Sold	8/29/2025	9/2/2025	001	TAX	(\$6.18)	\$0.00	(\$6.18)												
															019	TAX	(\$2.73)	\$0.00	(\$2.73)												
															003	TAX	(\$0.59)	\$0.00	(\$0.59)												
															005	TAX	(\$0.25)	\$0.00	(\$0.25)												
															004	TAX	(\$2.14)	\$0.00	(\$2.14)												
															002	TAX	(\$14.73)	\$0.00	(\$14.73)												
															Refund																
\$26.62																															
JONES, WARREN FREDERICK	JONES, WARREN FREDERICK		5914 EMERALD WOODS DR		INDIAN TRAIL, NC 28079	Proration	0071268809	TLE3765	AUTHORIZED	813428784	Refund Generated due to proration on Bill #0071268809-2024- 2024-0000-00	Vehicle Sold	8/15/2025	8/18/2025	001	TAX	(\$5.33)	\$0.00	(\$5.33)												
															600	TAX	(\$6.04)	\$0.00	(\$6.04)												
															023	TAX	(\$1.67)	\$0.00	(\$1.67)												
															003	TAX	(\$0.57)	\$0.00	(\$0.57)												
															005	TAX	(\$0.13)	\$0.00	(\$0.13)												
															004	TAX	(\$0.95)	\$0.00	(\$0.95)												
															002	TAX	(\$12.21)	\$0.00	(\$12.21)												
Refund																															
\$26.90																															
K C, SURESH	K C, SURESH	MUNANKARMI, YEJU	2712 TRINITY ST		MONROE, NC 28110	Proration	0071766666	REZ5195	AUTHORIZED	812215040	Refund Generated due to proration on Bill #0071766666-2024- 2024-0000-00	Vehicle Sold	8/8/2025	8/12/2025	001	TAX	(\$20.55)	\$0.00	(\$20.55)												
															200	TAX	(\$63.28)	\$0.00	(\$63.28)												
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00												
															003	TAX	(\$2.20)	\$0.00	(\$2.20)												
															005	TAX	(\$0.49)	\$0.00	(\$0.49)												
															004	TAX	(\$3.67)	\$0.00	(\$3.67)												
															002	TAX	(\$47.12)	\$0.00	(\$47.12)												
															Refund																
															\$137.31																
															KEATING, JOHN MICHAEL	KEATING, JOHN MICHAEL		8700 WHITEHAWK HILL RD		MAXHAW, NC 28173	Proration	0075146525	KMN2137	AUTHORIZED	930837312	Refund Generated due to proration on Bill #0075146525-2024- 2024-0000-00	Vehicle Sold	8/21/2025	8/22/2025	001	TAX
500	TAX	(\$246.25)	\$0.00	(\$246.25)																											
500	VEHICLE FEE	\$0.00	\$0.00	\$0.00																											
028	TAX	(\$33.45)	\$0.00	(\$33.45)																											
003	TAX	(\$11.19)	\$0.00	(\$11.19)																											
005	TAX	(\$2.49)	\$0.00	(\$2.49)																											
004	TAX	(\$18.68)	\$0.00	(\$18.68)																											
002	TAX	(\$239.34)	\$0.00	(\$239.34)																											
Refund																															
\$655.78																															
KILEY, KRISTINA HANSON	KILEY, KRISTINA HANSON		5476 HAYSTACK AVE		FORT MILL, SC 29707	Proration	0023502394	J021667	AUTHORIZED	694833210	Refund Generated due to proration on Bill #0023502394-2024- 2024-0000-00	Reg . Out of state	8/1/2025	8/4/2025	001	TAX	(\$14.63)	\$0.00	(\$14.63)												
															026	TAX	(\$3.57)	\$0.00	(\$3.57)												
															003	TAX	(\$1.57)	\$0.00	(\$1.57)												
															005	TAX	(\$0.35)	\$0.00	(\$0.35)												
															004	TAX	(\$2.62)	\$0.00	(\$2.62)												
															002	TAX	(\$33.53)	\$0.00	(\$33.53)												
															Refund																
\$56.27																															
KIMBRELL, EDDIE WADE	KIMBRELL, EDDIE WADE		8311 MORGAN MILL RD		MONROE, NC 28110	Proration	0046057155	BF8686	AUTHORIZED	697669098	Refund Generated due to proration on Bill #0046057155-2024- 2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$14.71)	\$0.00	(\$14.71)												
															017	TAX	(\$5.30)	\$0.00	(\$5.30)												
															003	TAX	(\$1.58)	\$0.00	(\$1.58)												
															005	TAX	(\$0.35)	\$0.00	(\$0.35)												
															004	TAX	(\$2.63)	\$0.00	(\$2.63)												
															002	TAX	(\$33.73)	\$0.00	(\$33.73)												
Refund																															
\$58.30																															
LACJAK, JULIE MARIE	LACJAK, JULIE MARIE		8611 WINGARD RD		MAXHAW, NC 28173	Proration	0058879705	HMV4335	AUTHORIZED	697704198	Refund Generated due to proration on Bill #0058879705-2024- 2024-0000-00	Vehicle Totalled	8/19/2025	8/20/2025	001	TAX	(\$11.25)	\$0.00	(\$11.25)												
															026	TAX	(\$2.75)	\$0.00	(\$2.75)												
															003	TAX	(\$1.21)	\$0.00	(\$1.21)												
															005	TAX	(\$0.27)	\$0.00	(\$0.27)												
															004	TAX	(\$2.01)	\$0.00	(\$2.01)												
															002	TAX	(\$25.00)	\$0.00	(\$25.00)												
															Refund																
\$43.29																															



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
LANEY, DARRELL EUGENE	LANEY, DARRELL EUGENE		2416 COMMUNITY PARK DR		MATTHEWS, NC 28184	Proration	0042192034	JC9986	AUTHORIZED	813947113	Refund Generated due to proration on Bill #0042192034-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$5.54)	\$0.00	(\$5.54)
															700	TAX	(\$7.32)	\$0.00	(\$7.32)
															020	TAX	(\$1.81)	\$0.00	(\$1.81)
															003	TAX	(\$0.60)	\$0.00	(\$0.60)
															005	TAX	(\$0.13)	\$0.00	(\$0.13)
															004	TAX	(\$0.99)	\$0.00	(\$0.99)
															002	TAX	(\$12.70)	\$0.00	(\$12.70)
Refund																	\$29.09		
LASHLEY, ANTONY BLAINE	LASHLEY, ANTONY BLAINE	LASHLEY, KIMBERLY DAWN	1815 FUNNY CIDE DR		WAXHAW, NC 28173	Proration	0069264653	KCR7904	AUTHORIZED	696185094	Refund Generated due to proration on Bill #0069264653-2024-2024-0000-00	Vehicle Sold	8/8/2025	8/12/2025	001	TAX	(\$36.87)	\$0.00	(\$36.87)
															026	TAX	(\$8.99)	\$0.00	(\$8.99)
															003	TAX	(\$3.95)	\$0.00	(\$3.95)
															005	TAX	(\$0.88)	\$0.00	(\$0.88)
															004	TAX	(\$6.00)	\$0.00	(\$6.00)
															002	TAX	(\$84.55)	\$0.00	(\$84.55)
															Refund				
LATEEF, SOHAIL KHALIQ	LATEEF, SOHAIL KHALIQ		3629 PETE DYE BLVD		CARMEL, IN 46033	Proration	0085708688	HEEL4LYF	AUTHORIZED	811767026	Refund Generated due to proration on Bill #0085708688-2024-2024-0000-00	Reg . Out of state	8/6/2025	8/7/2025	001	TAX	(\$181.75)	\$0.00	(\$181.75)
															600	TAX	(\$206.02)	\$0.00	(\$206.02)
															019	TAX	(\$71.05)	\$0.00	(\$71.05)
															003	TAX	(\$19.49)	\$0.00	(\$19.49)
															005	TAX	(\$4.34)	\$0.00	(\$4.34)
															004	TAX	(\$32.52)	\$0.00	(\$32.52)
															002	TAX	(\$416.73)	\$0.00	(\$416.73)
Refund																	\$931.90		
LE, NGUYEN XUAN THI	LE, NGUYEN XUAN THI		1000 FALLONDALE RD		WAXHAW, NC 28173	Proration	0064895535	TEJ9566	AUTHORIZED	930224352	Refund Generated due to proration on Bill #0064895535-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$6.78)	\$0.00	(\$6.78)
															500	TAX	(\$15.99)	\$0.00	(\$15.99)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$2.17)	\$0.00	(\$2.17)
															003	TAX	(\$0.72)	\$0.00	(\$0.72)
															005	TAX	(\$0.16)	\$0.00	(\$0.16)
															004	TAX	(\$1.21)	\$0.00	(\$1.21)
002	TAX	(\$15.55)	\$0.00	(\$15.55)															
Refund																	\$42.58		
LEE, LAUREN NA YOUNG	LEE, LAUREN NA YOUNG		4001 LAKE PRAIRIE DR		WEDDINGTON, NC 28184	Proration	0080765623	JKJ2685	AUTHORIZED	812215278	Refund Generated due to proration on Bill #0080765623-2024-2024-0000-00	Vehicle Sold	8/8/2025	8/12/2025	001	TAX	(\$14.50)	\$0.00	(\$14.50)
															800	TAX	(\$2.22)	\$0.00	(\$2.22)
															026	TAX	(\$3.53)	\$0.00	(\$3.53)
															003	TAX	(\$1.55)	\$0.00	(\$1.55)
															005	TAX	(\$0.34)	\$0.00	(\$0.34)
															004	TAX	(\$2.59)	\$0.00	(\$2.59)
															002	TAX	(\$33.25)	\$0.00	(\$33.25)
Refund																	\$57.98		
LEMERAND, JACQUES PIERRE	LEMERAND, JACQUES PIERRE		1613 YELLOW DAISY DR		MATTHEWS, NC 28184	Proration	0075792125	THC5524	AUTHORIZED	811128815	Refund Generated due to proration on Bill #0075792125-2024-2024-0000-00	Vehicle Sold	8/5/2025	8/6/2025	001	TAX	(\$5.91)	\$0.00	(\$5.91)
															700	TAX	(\$7.82)	\$0.00	(\$7.82)
															023	TAX	(\$1.85)	\$0.00	(\$1.85)
															003	TAX	(\$0.63)	\$0.00	(\$0.63)
															005	TAX	(\$0.14)	\$0.00	(\$0.14)
															004	TAX	(\$1.06)	\$0.00	(\$1.06)
															002	TAX	(\$13.55)	\$0.00	(\$13.55)
Refund																	\$30.96		
LI, SHULONG	LI, SHULONG		7709 STONEHAVEN DR		MARVIN, NC 28173	Proration	0069487943	REK8688	AUTHORIZED	931109856	Refund Generated due to proration on Bill #0069487943-2024-2024-0000-00	Vehicle Sold	8/22/2025	8/25/2025	001	TAX	(\$4.43)	\$0.00	(\$4.43)
															101	TAX	(\$2.17)	\$0.00	(\$2.17)
															101	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															026	TAX	(\$1.08)	\$0.00	(\$1.08)
															003	TAX	(\$0.47)	\$0.00	(\$0.47)
															005	TAX	(\$0.10)	\$0.00	(\$0.10)
															004	TAX	(\$0.79)	\$0.00	(\$0.79)
002	TAX	(\$10.15)	\$0.00	(\$10.15)															
Refund																	\$19.19		
LOFTIN, LATOYA LYNETTE	LOFTIN, LATOYA LYNETTE		1013 OLD TRADE ST		EDGEWOOD, SC 29712	Proration	0083351247	WPH9294	AUTHORIZED	815320758	Refund Generated due to proration on Bill #0083351247-2024-2024-0000-00	Reg . Out of state	8/26/2025	8/27/2025	001	TAX	(\$18.98)	\$0.00	(\$18.98)
															600	TAX	(\$21.52)	\$0.00	(\$21.52)
															023	TAX	(\$5.96)	\$0.00	(\$5.96)
															003	TAX	(\$2.03)	\$0.00	(\$2.03)
															005	TAX	(\$0.45)	\$0.00	(\$0.45)
															004	TAX	(\$3.40)	\$0.00	(\$3.40)
															002	TAX	(\$43.53)	\$0.00	(\$43.53)
Refund																	\$95.87		
LOWERY, MAURICE	LOWERY, MAURICE		7514 SUNBONNET LN		WAXHAW, NC 28173	Proration	0069123764	VEN4289	AUTHORIZED	930559000	Refund Generated due to proration on Bill #0069123764-2024-2024-0000-00	Vehicle Sold	8/20/2025	8/21/2025	001	TAX	(\$3.58)	\$0.00	(\$3.58)
															500	TAX	(\$8.45)	\$0.00	(\$8.45)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$1.15)	\$0.00	(\$1.15)
															003	TAX	(\$0.38)	\$0.00	(\$0.38)
															005	TAX	(\$0.09)	\$0.00	(\$0.09)
															004	TAX	(\$0.64)	\$0.00	(\$0.64)
002	TAX	(\$8.21)	\$0.00	(\$8.21)															
Refund																	\$22.50		



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
LUKEY, MARK	LUKEY, MARK		1509 W SANDY RIDGE RD	MONROE, NC 28112	Proration	0068625233	JK6862	AUTHORIZED	696840096	696840096	Refund Generated due to proration on Bill #0068625233-2024-2024-0000-00	Vehicle Sold	8/13/2025	8/14/2025	001	TAX	(\$10.01)	\$0.00	(\$10.01)
															029	TAX	(\$2.27)	\$0.00	(\$2.27)
															003	TAX	(\$1.07)	\$0.00	(\$1.07)
															005	TAX	(\$0.24)	\$0.00	(\$0.24)
															004	TAX	(\$1.79)	\$0.00	(\$1.79)
															002	TAX	(\$22.95)	\$0.00	(\$22.95)
															Refund				
\$38.33																			
MAKAREWICZ, DANIEL ANDREW	MAKAREWICZ, DANIEL ANDREW		609 CARVER POND LN	WAXHAW, NC 28173	Proration	0059402765	HFK6726	AUTHORIZED	696184866	696184866	Refund Generated due to proration on Bill #0059402765-2024-2024-0000-00	Vehicle Sold	8/8/2025	8/12/2025	001	TAX	(\$22.51)	\$0.00	(\$22.51)
															026	TAX	(\$5.49)	\$0.00	(\$5.49)
															003	TAX	(\$2.42)	\$0.00	(\$2.42)
															005	TAX	(\$0.54)	\$0.00	(\$0.54)
															004	TAX	(\$4.02)	\$0.00	(\$4.02)
															002	TAX	(\$51.61)	\$0.00	(\$51.61)
															Refund				
\$186.59																			
MAKOGON, DANIEL JAMES	MAKOGON, DANIEL JAMES		4016 CAMROSE CROSSING LN	MATTHEWS, NC 28104	Proration	0082518882	RKE1551	AUTHORIZED	697668210	697668210	Refund Generated due to proration on Bill #0082518882-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$37.02)	\$0.00	(\$37.02)
															020	TAX	(\$12.13)	\$0.00	(\$12.13)
															003	TAX	(\$3.97)	\$0.00	(\$3.97)
															005	TAX	(\$0.88)	\$0.00	(\$0.88)
															004	TAX	(\$6.62)	\$0.00	(\$6.62)
															002	TAX	(\$84.88)	\$0.00	(\$84.88)
															Refund				
\$145.50																			
MAKOGON, SERGEY	MAKOGON, SERGEY		4016 CAMROSE CROSSING LN	MATTHEWS, NC 28104	Proration	0081672537	PEL8804	AUTHORIZED	697668228	697668228	Refund Generated due to proration on Bill #0081672537-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$10.78)	\$0.00	(\$10.78)
															000	TAX	(\$12.22)	\$0.00	(\$12.22)
															003	TAX	(\$1.16)	\$0.00	(\$1.16)
															005	TAX	(\$0.26)	\$0.00	(\$0.26)
															004	TAX	(\$1.93)	\$0.00	(\$1.93)
															002	TAX	(\$24.71)	\$0.00	(\$24.71)
															Refund				
\$51.06																			
MALCOMB, RICKEY DAVID	MALCOMB, RICKEY DAVID	MALCOMB, ROXANNE DENISE	3121 N ROCKY RIVER RD	MONROE, NC 28110	Proration	0077237713	VBE1269	AUTHORIZED	814721145	814721145	Refund Generated due to proration on Bill #0077237713-2024-2024-0000-00	Vehicle Sold	8/22/2025	8/25/2025	001	TAX	(\$13.68)	\$0.00	(\$13.68)
															200	TAX	(\$42.10)	\$0.00	(\$42.10)
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															003	TAX	(\$1.47)	\$0.00	(\$1.47)
															005	TAX	(\$0.33)	\$0.00	(\$0.33)
															004	TAX	(\$2.45)	\$0.00	(\$2.45)
															002	TAX	(\$31.35)	\$0.00	(\$31.35)
Refund																			
\$91.38																			
MARSHALL, JOHANNA MARIA MAGDALENA	MARSHALL, JOHANNA MARIA MAGDALENA		1021 WADSWORTH LN	INDIAN TRAIL, NC 28079	Proration	0042784938	ZVF4889	AUTHORIZED	814480695	814480695	Refund Generated due to proration on Bill #0042784938-2024-2024-0000-00	Vehicle Sold	8/21/2025	8/22/2025	001	TAX	(\$4.60)	(\$0.26)	(\$4.86)
															020	TAX	(\$5.22)	(\$0.30)	(\$5.52)
															003	TAX	(\$1.51)	(\$0.09)	(\$1.60)
															003	TAX	(\$0.49)	(\$0.03)	(\$0.52)
															005	TAX	(\$0.11)	(\$0.01)	(\$0.12)
															004	TAX	(\$0.82)	(\$0.04)	(\$0.86)
															002	TAX	(\$10.55)	(\$0.61)	(\$11.16)
Refund																			
\$24.64																			
MARTIN, KIRK ALLAN	MARTIN, KIRK ALLAN		1234 FLINT CT	MATTHEWS, NC 28104	Proration	0070009552	TMH3961	AUTHORIZED	812749126	812749126	Refund Generated due to proration on Bill #0070009552-2024-2024-0000-00	Vehicle Sold	8/12/2025	8/13/2025	001	TAX	(\$1.96)	\$0.00	(\$1.96)
															000	TAX	(\$0.30)	\$0.00	(\$0.30)
															026	TAX	(\$0.48)	\$0.00	(\$0.48)
															003	TAX	(\$0.21)	\$0.00	(\$0.21)
															005	TAX	(\$0.05)	\$0.00	(\$0.05)
															004	TAX	(\$0.35)	\$0.00	(\$0.35)
															002	TAX	(\$4.49)	\$0.00	(\$4.49)
Refund																			
\$7.84																			
MARU PURNA, SAI CHANDER	MARU PURNA, SAI CHANDER		1043 SCOTCH MEADOWS LOOP	MONROE, NC 28110	Proration	0071016627	SWECHA	AUTHORIZED	813428777	813428777	Refund Generated due to proration on Bill #0071016627-2024-2024-0000-00	Vehicle Sold	8/15/2025	8/18/2025	001	TAX	(\$32.82)	\$0.00	(\$32.82)
															200	TAX	(\$101.07)	\$0.00	(\$101.07)
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															003	TAX	(\$3.52)	\$0.00	(\$3.52)
															005	TAX	(\$0.78)	\$0.00	(\$0.78)
															004	TAX	(\$5.87)	\$0.00	(\$5.87)
															002	TAX	(\$75.26)	\$0.00	(\$75.26)
Refund																			
\$219.32																			
MATHESON, FRANCES RACHEL	MATHESON, FRANCES RACHEL		8122 LOOKING GLASS LN	WAXHAW, NC 28173	Proration	0074049889	DMH3525	AUTHORIZED	697225200	697225200	Refund Generated due to proration on Bill #0074049889-2024-2024-0000-00	Vehicle Sold	8/15/2025	8/18/2025	001	TAX	(\$8.62)	\$0.00	(\$8.62)
															025	TAX	(\$2.65)	\$0.00	(\$2.65)
															003	TAX	(\$0.92)	\$0.00	(\$0.92)
															005	TAX	(\$0.21)	\$0.00	(\$0.21)
															004	TAX	(\$1.54)	\$0.00	(\$1.54)
															002	TAX	(\$19.77)	\$0.00	(\$19.77)
															Refund				
\$33.71																			
MCDUFFIE, MICHAEL EUGENE	MCDUFFIE, MICHAEL EUGENE		2109 DELAMERE DR	MATTHEWS, NC 28104	Proration	0068568552	FLD5440	AUTHORIZED	813428882	813428882	Refund Generated due to proration on Bill #0068568552-2024-2024-0000-00	Vehicle Sold	8/15/2025	8/18/2025	001	TAX	(\$11.23)	\$0.00	(\$11.23)
															000	TAX	(\$12.73)	\$0.00	(\$12.73)
															020	TAX	(\$3.68)	\$0.00	(\$3.68)
															003	TAX	(\$1.20)	\$0.00	(\$1.20)
															005	TAX	(\$0.27)	\$0.00	(\$0.27)
															004	TAX	(\$2.01)	\$0.00	(\$2.01)
															002	TAX	(\$25.76)	\$0.00	(\$25.76)
Refund																			
\$56.88																			



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change															
MCINTYRE APPRAISALS LLC	MCINTYRE APPRAISALS LLC		13088 ARNOLD PALMER CIR	LANCASTER, SC 29720		Proration	00708809517	JJY9361	AUTHORIZED	926443896	Refund Generated due to proration on Bill #00708809517-2024-2024-0000-00	Reg . Out of state	8/1/2025	8/4/2025	001	TAX	(\$66.60)	(\$3.34)	(\$69.94)															
															101	TAX	(\$32.65)	(\$1.63)	(\$34.28)															
															101	VEHICLE FEE	\$0.00	\$0.00	\$0.00															
															026	TAX	(\$16.24)	(\$0.81)	(\$17.05)															
															003	TAX	(\$7.14)	(\$0.36)	(\$7.50)															
															005	TAX	(\$1.59)	(\$0.08)	(\$1.67)															
															004	TAX	(\$11.92)	(\$0.59)	(\$12.51)															
															002	TAX	(\$152.71)	(\$7.63)	(\$160.34)															
															Refund																			
															\$303.29																			
MCINTYRE APPRAISALS LLC	MCINTYRE APPRAISALS LLC	MCINTYRE, JAMES ANDREW	13088 ARNOLD PALMER CIR	LANCASTER, SC 29720		Proration	0077345075	TAR4550	AUTHORIZED	927732464	Refund Generated due to proration on Bill #0077345075-2024-2024-0000-00	Reg . Out of state	8/6/2025	8/7/2025	001	TAX	(\$103.27)	\$0.00	(\$103.27)															
															101	TAX	(\$50.62)	\$0.00	(\$50.62)															
															101	VEHICLE FEE	\$0.00	\$0.00	\$0.00															
															026	TAX	(\$25.18)	\$0.00	(\$25.18)															
															003	TAX	(\$11.07)	\$0.00	(\$11.07)															
															005	TAX	(\$2.47)	\$0.00	(\$2.47)															
															004	TAX	(\$10.48)	\$0.00	(\$10.48)															
															002	TAX	(\$236.78)	\$0.00	(\$236.78)															
															Refund																			
															\$447.87																			
MCINTYRE, CAROLYN AMMON	MCINTYRE, CAROLYN AMMON		13088 ARNOLD PALMER CIR	LANCASTER, SC 29720		Proration	0080367701	HMA6447	AUTHORIZED	927732440	Refund Generated due to proration on Bill #0080367701-2024-2024-0000-00	Reg . Out of state	8/6/2025	8/7/2025	001	TAX	(\$29.32)	\$0.00	(\$29.32)															
															101	TAX	(\$14.37)	\$0.00	(\$14.37)															
															101	VEHICLE FEE	\$0.00	\$0.00	\$0.00															
															026	TAX	(\$7.15)	\$0.00	(\$7.15)															
															003	TAX	(\$3.15)	\$0.00	(\$3.15)															
															005	TAX	(\$0.70)	\$0.00	(\$0.70)															
															004	TAX	(\$5.25)	\$0.00	(\$5.25)															
															002	TAX	(\$67.23)	\$0.00	(\$67.23)															
															Refund																			
															\$127.17																			
MILLER, ROBERT ANSTEAD	MILLER, ROBERT ANSTEAD		1006 WOODHURST DR	MONROE, NC 28110		Proration	0071060510	TE23231	AUTHORIZED	815321731	Refund Generated due to proration on Bill #0071060510-2024-2024-0000-00	Vehicle Sold	8/26/2025	8/27/2025	001	TAX	(\$22.16)	\$0.00	(\$22.16)															
															970	TAX	(\$2.24)	\$0.00	(\$2.24)															
															026	TAX	(\$5.41)	\$0.00	(\$5.41)															
															003	TAX	(\$2.37)	\$0.00	(\$2.37)															
															005	TAX	(\$0.53)	\$0.00	(\$0.53)															
															004	TAX	(\$3.97)	\$0.00	(\$3.97)															
															002	TAX	(\$50.81)	\$0.00	(\$50.81)															
															Refund																			
															\$87.49																			
															MINTON, BENJAMIN COLE	MINTON, BENJAMIN COLE		2026 TERRAPIN ST	INDIAN TRAIL, NC 28079		Proration	0070180226	KEA8410	AUTHORIZED	814721033	Refund Generated due to proration on Bill #0070180226-2024-2024-0000-00	Vehicle Sold	8/22/2025	8/25/2025	001	TAX	(\$14.17)	(\$0.71)	(\$14.88)
600	TAX	(\$16.06)	(\$0.81)	(\$16.87)																														
023	TAX	(\$4.45)	(\$0.22)	(\$4.67)																														
003	TAX	(\$1.52)	(\$0.07)	(\$1.59)																														
005	TAX	(\$0.34)	(\$0.02)	(\$0.36)																														
004	TAX	(\$2.54)	(\$0.12)	(\$2.66)																														
002	TAX	(\$32.49)	(\$1.63)	(\$34.12)																														
Refund																																		
\$75.15																																		
MINTZ, DANIELLE CHRISTINE	MINTZ, DANIELLE CHRISTINE		609 QUEENSWATER LN	WAXHAW, NC 28173		Proration	0081942246	JMD8273	AUTHORIZED	697225638	Refund Generated due to proration on Bill #0081942246-2024-2024-0000-00	Vehicle Totalled	8/15/2025	8/18/2025																001	TAX	(\$30.88)	\$0.00	(\$30.88)
															026	TAX	(\$7.53)	\$0.00	(\$7.53)															
															003	TAX	(\$3.31)	\$0.00	(\$3.31)															
															005	TAX	(\$0.74)	\$0.00	(\$0.74)															
															004	TAX	(\$5.52)	\$0.00	(\$5.52)															
															002	TAX	(\$70.81)	\$0.00	(\$70.81)															
															Refund																			
															\$118.79																			
															MITTAL, MANISH	MITTAL, MANISH		312 VINTAGE CREEK DR	MATTHEWS, NC 28104		Proration	0070551540	RES4039	AUTHORIZED	813429715	Refund Generated due to proration on Bill #0070551540-2024-2024-0000-00	Vehicle Sold	8/15/2025	8/18/2025	001	TAX	(\$6.12)	\$0.00	(\$6.12)
																														800	TAX	(\$0.94)	\$0.00	(\$0.94)
026	TAX	(\$1.49)	\$0.00	(\$1.49)																														
003	TAX	(\$0.65)	\$0.00	(\$0.65)																														
005	TAX	(\$0.14)	\$0.00	(\$0.14)																														
004	TAX	(\$1.09)	\$0.00	(\$1.09)																														
002	TAX	(\$14.03)	\$0.00	(\$14.03)																														
Refund																																		
\$24.46																																		
MODE, MITZI GOBLE	MODE, MITZI GOBLE		5902 EMERALD WOODS DR	INDIAN TRAIL, NC 28079		Proration	0026385523	JLB8127	AUTHORIZED	815981264	Refund Generated due to proration on Bill #0026385523-2024-2024-0000-00	Vehicle Sold	8/28/2025	8/29/2025																001	TAX	(\$3.93)	\$0.00	(\$3.93)
															600	TAX	(\$4.45)	\$0.00	(\$4.45)															
															023	TAX	(\$1.23)	\$0.00	(\$1.23)															
															003	TAX	(\$0.42)	\$0.00	(\$0.42)															
															005	TAX	(\$0.10)	\$0.00	(\$0.10)															
															004	TAX	(\$0.70)	\$0.00	(\$0.70)															
															002	TAX	(\$9.01)	\$0.00	(\$9.01)															
															Refund																			
															\$19.84																			
															MORELLI, KRISTEN	MORELLI, KRISTEN		82 ETHAN ALLEN RD	FREEHOLD, NJ 07728		Proration	0081265511	TFP7333	AUTHORIZED	928245936	Refund Generated due to proration on Bill #0081265511-2024-2024-0000-00	Reg . Out of state	8/8/2025	8/12/2025	001	TAX	(\$48.37)	\$0.00	(\$48.37)
500	TAX	(\$114.11)	\$0.00	(\$114.11)																														
500	VEHICLE FEE	\$0.00	\$0.00	\$0.00																														
028	TAX	(\$15.50)	\$0.00	(\$15.50)																														
003	TAX	(\$5.19)	\$0.00	(\$5.19)																														
005	TAX	(\$1.15)	\$0.00	(\$1.15)																														
004	TAX	(\$8.66)	\$0.00	(\$8.66)																														
002	TAX	(\$110.91)	\$0.00	(\$110.91)																														
Refund																																		
\$303.89																																		



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
MORELLI, KRISTEN	MORELLI, KRISTEN	MORELLI, VINCENT PAUL	82 ETHAN ALLEN RD		FREEHOLD, NJ 07728	Proration	0081265512	HBX4543	AUTHORIZED	928245944	Refund Generated due to proration on Bill #0081265512-2024-2024-0000-00	Reg. Out of state	8/8/2025	8/12/2025	001	TAX	(\$30.01)	\$0.00	(\$30.01)
															500	TAX	(\$70.79)	\$0.00	(\$70.79)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$9.61)	\$0.00	(\$9.61)
															003	TAX	(\$3.22)	\$0.00	(\$3.22)
															005	TAX	(\$0.72)	\$0.00	(\$0.72)
															004	TAX	(\$5.37)	\$0.00	(\$5.37)
															002	TAX	(\$68.80)	\$0.00	(\$68.80)
Refund																	\$188.52		
MORELOCK, DANNY LEE	MORELOCK, DANNY LEE		8101 CANE POINTE LN		WAXHAW, NC 28173	Proration	0058972418	ADC1159	AUTHORIZED	696183678	Refund Generated due to proration on Bill #0058972418-2024-2024-0000-00	Vehicle Sold	8/8/2025	8/12/2025	001	TAX	(\$19.12)	\$0.00	(\$19.12)
															025	TAX	(\$5.88)	\$0.00	(\$5.88)
															003	TAX	(\$2.05)	\$0.00	(\$2.05)
															005	TAX	(\$0.46)	\$0.00	(\$0.46)
															004	TAX	(\$3.42)	\$0.00	(\$3.42)
															002	TAX	(\$43.84)	\$0.00	(\$43.84)
Refund																	\$74.77		
MORENO, JAIME	MORENO, JAIME		2313 MADEIRA CIR		WAXHAW, NC 28173	Proration	0073276651	HCS6659	AUTHORIZED	699158370	Refund Generated due to proration on Bill #0073276651-2024-2024-0000-00	Vehicle Sold	8/27/2025	8/28/2025	001	TAX	(\$6.06)	\$0.00	(\$6.06)
															015	TAX	(\$2.05)	\$0.00	(\$2.05)
															003	TAX	(\$0.65)	\$0.00	(\$0.65)
															005	TAX	(\$0.14)	\$0.00	(\$0.14)
															004	TAX	(\$1.08)	\$0.00	(\$1.08)
															002	TAX	(\$13.89)	\$0.00	(\$13.89)
Refund																	\$23.87		
MULLIS, RODNEY ALAN	MULLIS, RODNEY ALAN		7212 SECREST SHORTCUT RD		INDIAN TRAIL, NC 28079	Proration	0072417737	TLA8332	AUTHORIZED	698127624	Refund Generated due to proration on Bill #0072417737-2024-2024-0000-00	Vehicle Totalled	8/21/2025	8/22/2025	001	TAX	(\$32.12)	\$0.00	(\$32.12)
															023	TAX	(\$10.08)	\$0.00	(\$10.08)
															003	TAX	(\$3.44)	\$0.00	(\$3.44)
															005	TAX	(\$0.77)	\$0.00	(\$0.77)
															004	TAX	(\$5.75)	\$0.00	(\$5.75)
															002	TAX	(\$73.65)	\$0.00	(\$73.65)
Refund																	\$125.81		
NAGY LUP, FELIX	NAGY LUP, FELIX		1175 SCOTCH MEADOWS LOOP		MONROE, NC 28110	Proration	0078616322	RJC7872	AUTHORIZED	815979577	Refund Generated due to proration on Bill #0078616322-2023-2023-0000-00	Vehicle Totalled	8/28/2025	8/29/2025	001	TAX	(\$7.47)	\$0.00	(\$7.47)
															200	TAX	(\$23.01)	\$0.00	(\$23.01)
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															003	TAX	(\$0.80)	\$0.00	(\$0.80)
															005	TAX	(\$0.18)	\$0.00	(\$0.18)
															004	TAX	(\$1.34)	\$0.00	(\$1.34)
002	TAX	(\$17.13)	\$0.00	(\$17.13)															
Refund																	\$49.93		
NEWEY, CLIVE WILLIAM	NEWEY, CLIVE WILLIAM		PO BOX 826		INDIAN TRAIL, NC 28079	Proration	0082932772	FLJ3817	AUTHORIZED	698845944	Refund Generated due to proration on Bill #0082932772-2024-2024-0000-00	Vehicle Totalled	8/26/2025	8/27/2025	001	TAX	(\$5.69)	(\$0.27)	(\$5.96)
															015	TAX	(\$1.92)	(\$0.10)	(\$2.02)
															003	TAX	(\$0.61)	(\$0.03)	(\$0.64)
															005	TAX	(\$0.14)	(\$0.01)	(\$0.15)
															004	TAX	(\$1.02)	(\$0.05)	(\$1.07)
															002	TAX	(\$13.05)	(\$0.66)	(\$13.71)
Refund																	\$23.55		
NICOLETTE, JUSTIN ANTHONY	NICOLETTE, JUSTIN ANTHONY		15709 KNOLLWOOD PL		INDIAN TRAIL, NC 28079	Proration	0075282279	PNE4699	AUTHORIZED	812749112	Refund Generated due to proration on Bill #0075282279-2023-2023-0000-00	Vehicle Sold	8/12/2025	8/13/2025	700	TAX	(\$1.95)	\$0.00	(\$1.95)
															700	TAX	(\$1.19)	\$0.00	(\$1.19)
															023	TAX	(\$0.28)	\$0.00	(\$0.28)
															003	TAX	(\$0.11)	\$0.00	(\$0.11)
															005	TAX	(\$0.02)	\$0.00	(\$0.02)
															004	TAX	(\$0.19)	\$0.00	(\$0.19)
002	TAX	(\$2.40)	\$0.00	(\$2.40)															
Refund																	\$5.24		
NIGAM, MANOJ	NIGAM, MANOJ		8917 MAN OF WAR DR		WAXHAW, NC 28173	Proration	0061860670	PHK7102	AUTHORIZED	699677790	Refund Generated due to proration on Bill #0061860670-2024-2024-0000-00	Reg. Out of state	8/29/2025	9/2/2025	001	TAX	(\$4.10)	\$0.00	(\$4.10)
															026	TAX	(\$1.00)	\$0.00	(\$1.00)
															003	TAX	(\$0.44)	\$0.00	(\$0.44)
															005	TAX	(\$0.10)	\$0.00	(\$0.10)
															004	TAX	(\$0.73)	\$0.00	(\$0.73)
															002	TAX	(\$9.40)	\$0.00	(\$9.40)
Refund																	\$15.77		
NUGENT, CHRISTOPHER MICHAEL	NUGENT, CHRISTOPHER MICHAEL		2395 MILL HOUSE LN		MATTHEWS, NC 28104	Proration	0082976208	LHA5443	AUTHORIZED	814482676	Refund Generated due to proration on Bill #0082976208-2024-2024-0000-00	Vehicle Sold	8/21/2025	8/22/2025	001	TAX	(\$142.71)	\$0.00	(\$142.71)
															700	TAX	(\$188.87)	\$0.00	(\$188.87)
															023	TAX	(\$44.77)	\$0.00	(\$44.77)
															003	TAX	(\$15.30)	\$0.00	(\$15.30)
															005	TAX	(\$3.41)	\$0.00	(\$3.41)
															004	TAX	(\$25.53)	\$0.00	(\$25.53)
002	TAX	(\$327.21)	\$0.00	(\$327.21)															
Refund																	\$747.80		
NUNN, CLARENCE LYNN	NUNN, CLARENCE LYNN		18000 WHISPERING OAKS		CORNELIUS, NC 28031	Proration	0080567367	LCN8462	AUTHORIZED	696642036	Refund Generated due to proration on Bill #0080567367-2024-2024-0000-00	Vehicle Sold	8/12/2025	8/13/2025	001	TAX	(\$63.99)	\$0.00	(\$63.99)
															026	TAX	(\$15.60)	\$0.00	(\$15.60)
															003	TAX	(\$6.86)	\$0.00	(\$6.86)
															005	TAX	(\$1.53)	\$0.00	(\$1.53)
															004	TAX	(\$11.45)	\$0.00	(\$11.45)
															002	TAX	(\$146.73)	\$0.00	(\$146.73)
Refund																	\$246.16		



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change													
ORR, ROBERT KARL	ORR, ROBERT KARL		1117 BLACKMOOR RD	WAXHAM, NC 28173	Proration	0073731469	JEP5544	AUTHORIZED	930226976	Refund Generated due to proration on Bill #0073731469-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$43.50)	\$0.00	(\$43.50)														
														500	TAX	(\$102.62)	\$0.00	(\$102.62)														
														500	VEHICLE FEE	\$0.00	\$0.00	\$0.00														
														028	TAX	(\$13.94)	\$0.00	(\$13.94)														
														003	TAX	(\$4.67)	\$0.00	(\$4.67)														
														005	TAX	(\$1.04)	\$0.00	(\$1.04)														
														004	TAX	(\$7.78)	\$0.00	(\$7.78)														
														002	TAX	(\$99.73)	\$0.00	(\$99.73)														
														Refund																	\$273.28	
														Refund																	(\$13.30)	
PATEL, SANJEEV ASHOKKUMAR	PATEL, SANJEEV ASHOKKUMAR		9417 SIR HUON LN	WAXHAM, NC 28173	Proration	0068595821	TPE6505	AUTHORIZED	697705860	Refund Generated due to proration on Bill #0068595821-2024-2024-0000-00	Vehicle Sold	8/19/2025	8/20/2025	001	TAX	(\$13.30)	\$0.00	(\$13.30)														
														026	TAX	(\$3.24)	\$0.00	(\$3.24)														
														003	TAX	(\$1.42)	\$0.00	(\$1.42)														
														005	TAX	(\$0.32)	\$0.00	(\$0.32)														
														004	TAX	(\$2.38)	\$0.00	(\$2.38)														
														002	TAX	(\$30.48)	\$0.00	(\$30.48)														
														Refund																	\$51.14	
														Refund																	(\$61.30)	
														Refund																	(\$69.49)	
														PENSKE LEASING AND RENTALCOMPANY	PENSKE LEASING AND RENTALCOMPANY		2675 MORGANTOWN RD	READING, PA 19607	Proration	0066387738	ZM1972	AUTHORIZED	814719647	Refund Generated due to proration on Bill #0066387738-2024-2024-0000-00	Vehicle Sold	8/22/2025	8/25/2025	001	TAX	(\$61.30)	\$0.00	(\$61.30)
600	TAX	(\$69.49)	\$0.00	(\$69.49)																												
020	TAX	(\$20.09)	\$0.00	(\$20.09)																												
003	TAX	(\$6.57)	\$0.00	(\$6.57)																												
005	TAX	(\$1.46)	\$0.00	(\$1.46)																												
004	TAX	(\$10.97)	\$0.00	(\$10.97)																												
002	TAX	(\$140.55)	\$0.00	(\$140.55)																												
Refund																												\$310.43				
Refund																												(\$8.67)				
POPLIN, GARY DEAN	POPLIN, GARY DEAN		611 E LAWYERS RD	MONROE, NC 28110	Proration	0073685668	XKF2923	AUTHORIZED	814721250	Refund Generated due to proration on Bill #0073685668-2023-2023-0000-00	Vehicle Sold	8/22/2025	8/25/2025															001	TAX	(\$8.67)	\$0.00	(\$8.67)
														980	TAX	(\$1.06)	\$0.00	(\$1.06)														
														021	TAX	(\$3.26)	\$0.00	(\$3.26)														
														003	TAX	(\$0.93)	\$0.00	(\$0.93)														
														005	TAX	(\$0.21)	\$0.00	(\$0.21)														
														004	TAX	(\$1.55)	\$0.00	(\$1.55)														
														002	TAX	(\$19.88)	\$0.00	(\$19.88)														
														Refund																	\$35.56	
														Refund																	(\$18.46)	
														PRICE, TRACEY LYNNE	PRICE, TRACEY LYNNE	PRICE, TODD FRANCIS	3004 TIFFANY DR	MONROE, NC 28110	Proration	0070142637	E9735	AUTHORIZED	813947778	Refund Generated due to proration on Bill #0070142637-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$18.46)	\$0.00	(\$18.46)
200	TAX	(\$56.86)	\$0.00	(\$56.86)																												
200	VEHICLE FEE	\$0.00	\$0.00	\$0.00																												
003	TAX	(\$1.98)	\$0.00	(\$1.98)																												
005	TAX	(\$0.44)	\$0.00	(\$0.44)																												
004	TAX	(\$3.30)	\$0.00	(\$3.30)																												
002	TAX	(\$42.34)	\$0.00	(\$42.34)																												
Refund																												\$123.36				
Refund																												(\$27.82)				
PRINCE, HOLLY WILLIAMS	PRINCE, HOLLY WILLIAMS		1010 DUNBARTON RD	INDIAN TRAIL, NC 28079	Proration	0080747301	REC2327	AUTHORIZED	813946224	Refund Generated due to proration on Bill #0080747301-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025															001	TAX	(\$27.82)	\$0.00	(\$27.82)
														600	TAX	(\$31.54)	\$0.00	(\$31.54)														
														023	TAX	(\$8.73)	\$0.00	(\$8.73)														
														003	TAX	(\$2.98)	\$0.00	(\$2.98)														
														005	TAX	(\$0.66)	\$0.00	(\$0.66)														
														004	TAX	(\$4.98)	\$0.00	(\$4.98)														
														002	TAX	(\$63.80)	\$0.00	(\$63.80)														
														Refund																	\$140.51	
														Refund																	(\$23.36)	
														PRITCHARD, GORDON ALLEN	PRITCHARD, GORDON ALLEN	PRITCHARD, LINDA ELLEN	6046 WALDORF AVE	MONROE, NC 28110	Proration	0077632102	VCM1360	AUTHORIZED	697225542	Refund Generated due to proration on Bill #0077632102-2024-2024-0000-00	Vehicle Sold	8/15/2025	8/18/2025	001	TAX	(\$23.36)	\$0.00	(\$23.36)
026	TAX	(\$5.70)	\$0.00	(\$5.70)																												
003	TAX	(\$2.51)	\$0.00	(\$2.51)																												
005	TAX	(\$0.56)	\$0.00	(\$0.56)																												
004	TAX	(\$4.18)	\$0.00	(\$4.18)																												
002	TAX	(\$53.56)	\$0.00	(\$53.56)																												
Refund																												\$89.87				
Refund																												(\$15.09)				
Refund																												(\$5.59)				
PROPHET, ROBERT ANDERSON	PROPHET, ROBERT ANDERSON	PROPHET, VALERIA LYNETTE	1144 ASHE MEADOW DR	INDIAN TRAIL, NC 28079	Proration	0075086683	KMW1915	AUTHORIZED	698332506	Refund Generated due to proration on Bill #0075086683-2024-2024-0000-00	Vehicle Sold	8/22/2025	8/25/2025															001	TAX	(\$15.09)	\$0.00	(\$15.09)
														016	TAX	(\$5.59)	\$0.00	(\$5.59)														
														003	TAX	(\$1.62)	\$0.00	(\$1.62)														
														005	TAX	(\$0.36)	\$0.00	(\$0.36)														
														004	TAX	(\$2.70)	\$0.00	(\$2.70)														
														002	TAX	(\$34.61)	\$0.00	(\$34.61)														
														Refund																	\$59.97	
														Refund																	(\$7.59)	
														PROTEKY INC	PROTEKY INC	GOPU, AROGYA JOSNA	1117 MESA WAY	MARVIN, NC 28173	Proration	0083740775	FCV5323	AUTHORIZED	928856136	Refund Generated due to proration on Bill #0083740775-2024-2024-0000-00	Vehicle Sold	8/12/2025	8/13/2025	001	TAX	(\$7.59)	(\$0.37)	(\$7.96)
																												101	TAX	(\$3.72)	(\$0.19)	(\$3.91)
101	VEHICLE FEE	\$0.00	\$0.00	\$0.00																												
026	TAX	(\$1.85)	(\$0.09)	(\$1.94)																												
003	TAX	(\$0.81)	(\$0.04)	(\$0.85)																												
005	TAX	(\$0.18)	(\$0.01)	(\$0.19)																												
004	TAX	(\$1.36)	(\$0.07)	(\$1.43)																												
002	TAX	(\$17.39)	(\$0.87)	(\$18.26)																												
Refund																												\$34.54				



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
RABON, DAVID REID JR	RABON, DAVID REID JR		9921 WINDROW DR		INDIAN TRAIL, NC 28079	Proration	0061435859	RKP4371	AUTHORIZED	811127996	Refund Generated due to proration on Bill #0061435859-2024-2024-0000-00	Vehicle Sold	8/5/2025	8/6/2025	001	TAX	(\$1.25)	\$0.00	(\$1.25)
															930	TAX	(\$0.15)	\$0.00	(\$0.15)
															016	TAX	(\$0.47)	\$0.00	(\$0.47)
															003	TAX	(\$0.13)	\$0.00	(\$0.13)
															005	TAX	(\$0.03)	\$0.00	(\$0.03)
															004	TAX	(\$0.22)	\$0.00	(\$0.22)
															002	TAX	(\$2.87)	\$0.00	(\$2.87)
Refund																	\$5.12		
RATLEY, ERVIN DARRELL	RATLEY, ERVIN DARRELL		7306 INDIAN TRAIL FAIRVIE RD.		INDIAN TRAIL, NC 28079	Adjustment < \$100	0081138913	VEP4531	PENDING	930837208	Refund Generated due to adjustment on Bill #0081138913-2024-2024-0000	Situs error	8/21/2025		001	TAX	\$0.00	\$0.00	\$0.00
															200	TAX	(\$15.00)	\$0.00	(\$15.00)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															023	TAX	\$1.54	\$0.00	\$1.54
															003	TAX	\$0.00	\$0.00	\$0.00
															005	TAX	\$0.00	\$0.00	\$0.00
															004	TAX	\$0.00	\$0.00	\$0.00
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$43.54		
RATLEY, ERVIN DARRELL	RATLEY, ERVIN DARRELL		7306 INDIAN TRAIL FAIRVIE RD.		INDIAN TRAIL, NC 28079	Adjustment < \$100	0086357807	VHE5837	PENDING	930837216	Refund Generated due to adjustment on Bill #0086357807-2025-2025-0000	Situs error	8/21/2025		001	TAX	\$0.00	\$0.00	\$0.00
															200	TAX	(\$4.40)	\$0.00	(\$4.40)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															023	TAX	\$0.43	\$0.00	\$0.43
															003	TAX	\$0.00	\$0.00	\$0.00
															005	TAX	\$0.00	\$0.00	\$0.00
															004	TAX	\$0.00	\$0.00	\$0.00
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$33.97		
REDFERN, TAMIKO YVETTE	REDFERN, TAMIKO YVETTE		2026 CLOVER HILL RD		INDIAN TRAIL, NC 28079	Proration	0076230410	RHL4269	AUTHORIZED	810639571	Refund Generated due to proration on Bill #0076230410-2024-2024-0000-00	Vehicle Sold	8/1/2025	8/4/2025	001	TAX	(\$5.68)	(\$0.29)	(\$5.97)
															600	TAX	(\$6.44)	(\$0.32)	(\$6.76)
															026	TAX	(\$1.39)	(\$0.07)	(\$1.46)
															003	TAX	(\$0.61)	(\$0.03)	(\$0.64)
															005	TAX	(\$0.13)	(\$0.01)	(\$0.14)
															004	TAX	(\$1.01)	(\$0.05)	(\$1.06)
															002	TAX	(\$13.03)	(\$0.65)	(\$13.68)
Refund																	\$29.71		
RELIHAN, WILLIE	RELIHAN, WILLIE		1027 WIND CARVED LN		MONROE, NC 28110	Adjustment < \$100	0052744053	HCS5174	PENDING	813988987	Refund Generated due to adjustment on Bill #0052744053-2024-2024-0000-00	Over Assessment	8/19/2025		001	TAX	(\$3.22)	\$0.00	(\$3.22)
															200	TAX	(\$9.90)	\$0.00	(\$9.90)
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															003	TAX	(\$0.34)	\$0.00	(\$0.34)
															005	TAX	(\$0.08)	\$0.00	(\$0.08)
															004	TAX	(\$0.58)	\$0.00	(\$0.58)
															002	TAX	(\$7.37)	\$0.00	(\$7.37)
Refund																	\$21.49		
RIZAL, LOK NATH	RIZAL, LOK NATH		1174 GLADIOLUS CT		REYNOLDSBURG, OH 43068	Proration	0079046017	TLP8571	AUTHORIZED	929119728	Refund Generated due to proration on Bill #0079046017-2024-2024-0000-00	Reg. Out of state	8/13/2025	8/14/2025	001	TAX	(\$11.13)	\$0.00	(\$11.13)
															500	TAX	(\$26.25)	\$0.00	(\$26.25)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$3.57)	\$0.00	(\$3.57)
															003	TAX	(\$1.19)	\$0.00	(\$1.19)
															005	TAX	(\$0.27)	\$0.00	(\$0.27)
															004	TAX	(\$1.99)	\$0.00	(\$1.99)
002	TAX	(\$25.51)	\$0.00	(\$25.51)															
Refund																	\$69.91		
ROBERSON, STEVEN LEVETT	ROBERSON, STEVEN LEVETT		5063 STONEHILL LN		MATTHEWS, NC 28104	Proration	0064439003	TKD9029	AUTHORIZED	812748874	Refund Generated due to proration on Bill #0064439003-2024-2024-0000-00	Vehicle Sold	8/12/2025	8/13/2025	001	TAX	(\$10.06)	\$0.00	(\$10.06)
															700	TAX	(\$13.31)	\$0.00	(\$13.31)
															020	TAX	(\$3.30)	\$0.00	(\$3.30)
															003	TAX	(\$1.08)	\$0.00	(\$1.08)
															005	TAX	(\$0.24)	\$0.00	(\$0.24)
															004	TAX	(\$1.80)	\$0.00	(\$1.80)
															002	TAX	(\$23.07)	\$0.00	(\$23.07)
Refund																	\$52.86		
ROBINSON HEATH, TAMMY ANN	ROBINSON HEATH, TAMMY ANN	HEATH, MICHAEL DARRIN	5205 WILLOW RUN DR		MONROE, NC 28110	Proration	0081239126	TEZ2494	AUTHORIZED	814480177	Refund Generated due to proration on Bill #0081239126-2024-2024-0000-00	Vehicle Totalled	8/21/2025	8/22/2025	001	TAX	(\$8.56)	\$0.00	(\$8.56)
															970	TAX	(\$0.85)	\$0.00	(\$0.85)
															019	TAX	(\$3.35)	\$0.00	(\$3.35)
															003	TAX	(\$0.92)	\$0.00	(\$0.92)
															005	TAX	(\$0.20)	\$0.00	(\$0.20)
															004	TAX	(\$1.53)	\$0.00	(\$1.53)
															002	TAX	(\$19.62)	\$0.00	(\$19.62)
Refund																	\$35.04		
RODRIGUEZ, ADRIANY RAFAEL	RODRIGUEZ, ADRIANY RAFAEL		2815 BARNARD CASTLE LN		WEDDINGTON, NC 28104	Adjustment < \$100	00800967585	LEZ5534	PENDING	1046881233	Refund Generated due to adjustment on Bill #00800967585-2024-2024-0000	Situs error	8/20/2025		001	TAX	\$0.00	\$0.00	\$0.00
															200	TAX	(\$7.54)	\$0.00	(\$7.54)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															700	TAX	\$3.24	\$0.00	\$3.24
															020	TAX	\$0.80	\$0.00	\$0.80
															003	TAX	\$0.00	\$0.00	\$0.00
															005	TAX	\$0.00	\$0.00	\$0.00
004	TAX	\$0.00	\$0.00	\$0.00															
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$33.50		



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change													
ROLLER, DARWOOD FREDERICK	ROLLER, DARWOOD FREDERICK	ROLLER, EMELIA WRIGHT	7900 KINGSTON DR	WAXHAN, NC 28173	Proration	0030096622	DMF2520	AUTHORIZED	930273360	Refund Generated due to proration on Bill #0030096622-2024-2024-0000-00	Vehicle Sold	8/19/2025	8/20/2025	001	TAX	(\$2.05)	\$0.00	(\$2.05)														
														500	TAX	(\$4.83)	\$0.00	(\$4.83)														
														500	VEHICLE FEE	\$0.00	\$0.00	\$0.00														
														028	TAX	(\$0.65)	\$0.00	(\$0.65)														
														003	TAX	(\$0.22)	\$0.00	(\$0.22)														
														005	TAX	(\$0.05)	\$0.00	(\$0.05)														
														004	TAX	(\$0.36)	\$0.00	(\$0.36)														
														002	TAX	(\$4.69)	\$0.00	(\$4.69)														
														Refund																		
														\$12.85																		
RORIE, VERNON ALFREDO DANIEL	RORIE, VERNON ALFREDO DANIEL		6053 OXFORDSHIRE RD	WAXHAN, NC 28173	Proration	0083778581	LHD6523	AUTHORIZED	811767236	Refund Generated due to proration on Bill #0083778581-2024-2024-0000-00	Vehicle Sold	8/6/2025	8/7/2025	001	TAX	(\$27.20)	\$0.00	(\$27.20)														
														800	TAX	(\$4.17)	\$0.00	(\$4.17)														
														026	TAX	(\$6.63)	\$0.00	(\$6.63)														
														003	TAX	(\$2.92)	\$0.00	(\$2.92)														
														005	TAX	(\$0.65)	\$0.00	(\$0.65)														
														004	TAX	(\$4.87)	\$0.00	(\$4.87)														
														002	TAX	(\$62.36)	\$0.00	(\$62.36)														
														Refund																		
														\$108.80																		
														ROXON, JACOB CHRISTOPHER	ROXON, JACOB CHRISTOPHER		2109 SANDY POND LN	WAXHAN, NC 28173	Adjustment < \$100	0072810379	RCHIHS	PENDING	697919382	Refund Generated due to adjustment on Bill #0072810379-2024-2024-0000-00	Over Assessment	8/20/2025		001	TAX	(\$9.75)	\$0.00	(\$9.75)
026	TAX	(\$2.37)	\$0.00	(\$2.37)																												
003	TAX	(\$1.05)	\$0.00	(\$1.05)																												
005	TAX	(\$0.24)	\$0.00	(\$0.24)																												
004	TAX	(\$1.74)	\$0.00	(\$1.74)																												
002	TAX	(\$22.34)	\$0.00	(\$22.34)																												
Refund																																
\$37.49																																
RUNKEL, PHILIP SCHRAMM	RUNKEL, PHILIP SCHRAMM	RUNKEL, PAMELA BENSON	721 COACHMAN DR	WAXHAN, NC 28173	Proration	0058964307	HHB7957	AUTHORIZED	696840276	Refund Generated due to proration on Bill #0058964307-2024-2024-0000-00	Vehicle Sold	8/13/2025	8/14/2025															001	TAX	(\$21.48)	\$0.00	(\$21.48)
																												026	TAX	(\$5.23)	\$0.00	(\$5.23)
														003	TAX	(\$2.30)	\$0.00	(\$2.30)														
														005	TAX	(\$0.51)	\$0.00	(\$0.51)														
														004	TAX	(\$3.84)	\$0.00	(\$3.84)														
														002	TAX	(\$49.25)	\$0.00	(\$49.25)														
														Refund																		
														\$82.61																		
														RYBARCZYK, SHIPRA KAUL	RYBARCZYK, SHIPRA KAUL	RYBARCZYK, JOHN ROBERT	9103 CLERKENWELL DR	WAXHAN, NC 28173	Proration	0083608688	LHZ2068	AUTHORIZED	699677778	Refund Generated due to proration on Bill #0083608688-2024-2024-0000-00	Vehicle Sold	8/29/2025	9/2/2025	001	TAX	(\$43.42)	\$0.00	(\$43.42)
																												026	TAX	(\$10.59)	\$0.00	(\$10.59)
003	TAX	(\$4.65)	\$0.00	(\$4.65)																												
005	TAX	(\$1.04)	\$0.00	(\$1.04)																												
004	TAX	(\$7.77)	\$0.00	(\$7.77)																												
002	TAX	(\$99.56)	\$0.00	(\$99.56)																												
Refund																																
\$167.93																																
SALAS, ALBERT LAURENCE	SALAS, ALBERT LAURENCE		4418 HORSESHOE BEND	MATTHEWS, NC 28104	Proration	0075820618	SAM887	AUTHORIZED	813217601	Refund Generated due to proration on Bill #0075820618-2024-2024-0000-00	Vehicle Totalled	8/14/2025	8/15/2025															001	TAX	(\$47.56)	\$0.00	(\$47.56)
																												800	TAX	(\$7.28)	\$0.00	(\$7.28)
														026	TAX	(\$11.60)	\$0.00	(\$11.60)														
														003	TAX	(\$5.10)	\$0.00	(\$5.10)														
														005	TAX	(\$1.13)	\$0.00	(\$1.13)														
														004	TAX	(\$8.51)	\$0.00	(\$8.51)														
														002	TAX	(\$109.05)	\$0.00	(\$109.05)														
														Refund																		
														\$190.23																		
														SAMMONS, BARBARA JOY	SAMMONS, BARBARA JOY		2870 CHARLEVOIX ST	THE VILLAGES, FL 32163	Proration	0064355425	JKT9102	AUTHORIZED	814721089	Refund Generated due to proration on Bill #0064355425-2024-2024-0000-00	Vehicle Sold	8/22/2025	8/25/2025	001	TAX	(\$20.68)	\$0.00	(\$20.68)
600	TAX	(\$23.45)	\$0.00	(\$23.45)																												
019	TAX	(\$8.09)	\$0.00	(\$8.09)																												
003	TAX	(\$2.22)	\$0.00	(\$2.22)																												
005	TAX	(\$0.49)	\$0.00	(\$0.49)																												
004	TAX	(\$3.70)	\$0.00	(\$3.70)																												
002	TAX	(\$47.43)	\$0.00	(\$47.43)																												
Refund																																
\$106.06																																
SAMOCRAINI, IGOR	SAMOCRAINI, IGOR		7609 WATER OAK LN	MONROE, NC 28110	Proration	0071499909	TCV7210	AUTHORIZED	813947085	Refund Generated due to proration on Bill #0071499909-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025															001	TAX	(\$5.48)	\$0.00	(\$5.48)
														930	TAX	(\$0.67)	\$0.00	(\$0.67)														
														016	TAX	(\$2.03)	\$0.00	(\$2.03)														
														003	TAX	(\$0.59)	\$0.00	(\$0.59)														
														005	TAX	(\$0.13)	\$0.00	(\$0.13)														
														004	TAX	(\$0.98)	\$0.00	(\$0.98)														
														002	TAX	(\$12.57)	\$0.00	(\$12.57)														
														Refund																		
														\$22.45																		
														SAZONCICKS, JURIS	SAZONCICKS, JURIS		1544 PRICKLY LN	WAXHAN, NC 28173	Proration	0083684585	LHZ1779	AUTHORIZED	932213184	Refund Generated due to proration on Bill #0083684585-2024-2024-0000-00	Vehicle Sold	8/27/2025	8/28/2025	001	TAX	(\$13.26)	\$0.00	(\$13.26)
500	TAX	(\$31.29)	\$0.00	(\$31.29)																												
500	VEHICLE FEE	\$0.00	\$0.00	\$0.00																												
028	TAX	(\$4.25)	\$0.00	(\$4.25)																												
003	TAX	(\$1.42)	\$0.00	(\$1.42)																												
005	TAX	(\$0.32)	\$0.00	(\$0.32)																												
004	TAX	(\$2.37)	\$0.00	(\$2.37)																												
002	TAX	(\$30.41)	\$0.00	(\$30.41)																												
Refund																																
\$83.32																																
SCHULZ, ROBERT STEVEN	SCHULZ, ROBERT STEVEN		439 TURLEBACK RDG	WEDDINGTON, NC 28104	Proration	0082411868	KHA8822	AUTHORIZED	814481311	Refund Generated due to proration on Bill #0082411868-2024-2024-0000-00	Vehicle Sold	8/21/2025	8/22/2025	001	TAX	(\$44.70)	\$0.00	(\$44.70)														
														800	TAX	(\$6.85)	\$0.00	(\$6.85)														
														026	TAX	(\$10.90)	\$0.00	(\$10.90)														
														003	TAX	(\$4.79)	\$0.00	(\$4.79)														
														005	TAX	(\$1.07)	\$0.00	(\$1.07)														
														004	TAX	(\$8.00)	\$0.00	(\$8.00)														
														002	TAX	(\$102.50)	\$0.00	(\$102.50)														
														Refund																		
														\$178.81																		



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change														
SEHGAL, VISHAL	SEHGAL, VISHAL	4034 FLOWERING PEACH RD	MARVIN, NC 28173	Proration	0079966831	JAH7423	AUTHORIZED	927733008	Refund Generated due to proration on Bill #0079966831-2024-2024-0000-00	Insurance Lapse	8/6/2025	8/7/2025	001	TAX		(\$28.55)	\$0.00	(\$28.55)															
													101	TAX		(\$13.99)	\$0.00	(\$13.99)															
													101	VEHICLE FEE		\$0.00	\$0.00	\$0.00															
													026	TAX		(\$6.96)	\$0.00	(\$6.96)															
													003	TAX		(\$3.06)	\$0.00	(\$3.06)															
													005	TAX		(\$0.68)	\$0.00	(\$0.68)															
													004	TAX		(\$5.11)	\$0.00	(\$5.11)															
													002	TAX		(\$65.45)	\$0.00	(\$65.45)															
													Refund																				
													\$123.80																				
SHOBE, DAVID HENRY	SHOBE, DAVID HENRY	265 WEDDINGTON RD	MATTHEWS, NC 28104	Proration	0078136357	JLC1172	AUTHORIZED	815321052	Refund Generated due to proration on Bill #0078136357-2024-2024-0000-00	Vehicle Sold	8/26/2025	8/27/2025	001	TAX		(\$4.17)	\$0.00	(\$4.17)															
													800	TAX		(\$0.64)	\$0.00	(\$0.64)															
													026	TAX		(\$1.01)	\$0.00	(\$1.01)															
													003	TAX		(\$0.45)	\$0.00	(\$0.45)															
													005	TAX		(\$0.10)	\$0.00	(\$0.10)															
													004	TAX		(\$0.75)	\$0.00	(\$0.75)															
													002	TAX		(\$9.55)	\$0.00	(\$9.55)															
													Refund																				
													\$16.67																				
													SLATER, DARRELL KEITH	SLATER, DARRELL KEITH	9990 JACK NICKLAUS DR	LANCASTER, SC 29720	Proration	0075835845	5159VA	AUTHORIZED	811096510	Refund Generated due to proration on Bill #0075835845-2024-2024-0000-00	Reg. Out of state	8/4/2025	8/5/2025	001	TAX		(\$21.88)	\$0.00	(\$21.88)		
200	TAX		(\$67.38)	\$0.00	(\$67.38)																												
200	VEHICLE FEE		\$0.00	\$0.00	\$0.00																												
003	TAX		(\$2.34)	\$0.00	(\$2.34)																												
005	TAX		(\$0.52)	\$0.00	(\$0.52)																												
004	TAX		(\$3.91)	\$0.00	(\$3.91)																												
002	TAX		(\$50.18)	\$0.00	(\$50.18)																												
Refund																																	
\$146.21																																	
SLATER, DARRELL KEITH	SLATER, DARRELL KEITH	9990 JACK NICKLAUS DR	LANCASTER, SC 29720	Proration	0075835122	5159VA	AUTHORIZED	811096524	Refund Generated due to proration on Bill #0075835122-2024-2024-0000-00	Reg. Out of state	8/4/2025	8/5/2025														001	TAX		(\$12.25)	\$0.00	(\$12.25)		
													200	TAX		(\$37.74)	\$0.00	(\$37.74)															
													200	VEHICLE FEE		\$0.00	\$0.00	\$0.00															
													003	TAX		(\$1.31)	\$0.00	(\$1.31)															
													005	TAX		(\$0.29)	\$0.00	(\$0.29)															
													004	TAX		(\$2.19)	\$0.00	(\$2.19)															
													002	TAX		(\$28.10)	\$0.00	(\$28.10)															
													Refund																				
													\$81.88																				
													SMITH, JEREMIAH RODERICK	SMITH, JEREMIAH RODERICK	3107 TWELVE MILE CREEK RD	MATTHEWS, NC 28104	Proration	0051540160	EAH5630	AUTHORIZED	811128633	Refund Generated due to proration on Bill #0051540160-2024-2024-0000-00	Vehicle Sold	8/5/2025	8/6/2025	001	TAX		(\$5.00)	(\$0.37)	(\$5.37)		
800	TAX		(\$0.76)	(\$0.05)	(\$0.81)																												
026	TAX		(\$1.22)	(\$0.09)	(\$1.31)																												
003	TAX		(\$0.53)	(\$0.04)	(\$0.57)																												
005	TAX		(\$0.12)	(\$0.01)	(\$0.13)																												
004	TAX		(\$0.89)	(\$0.06)	(\$0.95)																												
002	TAX		(\$11.47)	(\$0.83)	(\$12.30)																												
Refund																																	
\$21.44																																	
SNEAD, MARK CHRISTOPHER	SNEAD, MARK CHRISTOPHER	SNEAD, TANYA SHEREE	6402 LANDSFORD RD	MARSHVILLE, NC 28103	Proration	0059942189	8BA1771	AUTHORIZED	695993886	Refund Generated due to proration on Bill #0059942189-2024-2024-0000-00	Vehicle Sold	8/7/2025														8/8/2025	001	TAX		(\$54.92)	\$0.00	(\$54.92)	
													018	TAX		(\$24.77)	\$0.00	(\$24.77)															
													003	TAX		(\$5.88)	\$0.00	(\$5.88)															
													005	TAX		(\$1.31)	\$0.00	(\$1.31)															
													004	TAX		(\$9.83)	\$0.00	(\$9.83)															
													002	TAX		(\$125.92)	\$0.00	(\$125.92)															
													Refund																				
													\$222.63																				
													STEARNS, MICHAEL WILLIAM	STEARNS, MICHAEL WILLIAM	STEARNS, JESSICA DAILEY	1018 FORBISHIRE DR	MATTHEWS, NC 28104	Proration	0075319463	TPF4592	AUTHORIZED	815980424	Refund Generated due to proration on Bill #0075319463-2024-2024-0000-00	Vehicle Sold	8/28/2025		8/29/2025	001	TAX		(\$21.54)	\$0.00	(\$21.54)
																												600	TAX		(\$24.42)	\$0.00	(\$24.42)
020	TAX		(\$7.06)	\$0.00	(\$7.06)																												
003	TAX		(\$2.31)	\$0.00	(\$2.31)																												
005	TAX		(\$0.51)	\$0.00	(\$0.51)																												
004	TAX		(\$3.86)	\$0.00	(\$3.86)																												
002	TAX		(\$49.40)	\$0.00	(\$49.40)																												
Refund																																	
\$109.10																																	
STEPHENSON, TAYLOR LYNN-ANN	STEPHENSON, TAYLOR LYNN-ANN	5106 DARBY DRIVE	MONROE, NC 28110	Proration	0074981595	FCT7608	AUTHORIZED	814719794	Refund Generated due to proration on Bill #0074981595-2024-2024-0000-00	Vehicle Sold	8/22/2025	8/25/2025														001		TAX		(\$8.20)	\$0.00	(\$8.20)	
													600	TAX		(\$9.29)	\$0.00	(\$9.29)															
													019	TAX		(\$3.20)	\$0.00	(\$3.20)															
													003	TAX		(\$0.88)	\$0.00	(\$0.88)															
													005	TAX		(\$0.19)	\$0.00	(\$0.19)															
													004	TAX		(\$1.46)	\$0.00	(\$1.46)															
													002	TAX		(\$18.80)	\$0.00	(\$18.80)															
													Refund																				
													\$42.02																				
													STEWART, PATRICK DYLAN	STEWART, PATRICK DYLAN	4693 SHANNAMARA DR	MATTHEWS, NC 28104	Proration	0083502220	TMD6842	AUTHORIZED	813217398	Refund Generated due to proration on Bill #0083502220-2024-2024-0000-00	Vehicle Sold	8/14/2025	8/15/2025	001	TAX		(\$6.03)	\$0.00	(\$6.03)		
700	TAX		(\$7.97)	\$0.00	(\$7.97)																												
023	TAX		(\$1.89)	\$0.00	(\$1.89)																												
003	TAX		(\$0.65)	\$0.00	(\$0.65)																												
005	TAX		(\$0.15)	\$0.00	(\$0.15)																												
004	TAX		(\$1.08)	\$0.00	(\$1.08)																												
002	TAX		(\$13.82)	\$0.00	(\$13.82)																												
Refund																																	
\$31.59																																	



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
STOUT, BRIDGETTE YVETTE	STOUT, BRIDGETTE YVETTE	1309 CARLSON DR	MONROE, NC 28110	Proration	0086475748	LHA9033	AUTHORIZED	812979930	Refund Generated due to proration on Bill #0086475748-2025-0000-00	Insurance Lapse	8/13/2025	8/14/2025	001	TAX	(\$7.15)	\$0.00	(\$7.15)		
													980	TAX	(\$1.27)	\$0.00	(\$1.27)		
													021	TAX	(\$3.44)	\$0.00	(\$3.44)		
													003	TAX	(\$0.68)	\$0.00	(\$0.68)		
													005	TAX	(\$0.28)	\$0.00	(\$0.28)		
													004	TAX	(\$2.47)	\$0.00	(\$2.47)		
													002	TAX	(\$17.04)	\$0.00	(\$17.04)		
Refund																	\$32.33		
TARLTON, JUSTIN KODY	TARLTON, JUSTIN KODY	4197 RENEE FORD RD	STANFIELD, NC 28163	Proration	0065431943	HFJ1449	AUTHORIZED	815981250	Refund Generated due to proration on Bill #0065431943-2024-0000-00	Vehicle Sold	8/28/2025	8/29/2025	001	TAX	(\$19.23)	\$0.00	(\$19.23)		
													980	TAX	(\$2.36)	\$0.00	(\$2.36)		
													021	TAX	(\$7.98)	\$0.00	(\$7.98)		
													003	TAX	(\$2.06)	\$0.00	(\$2.06)		
													005	TAX	(\$0.46)	\$0.00	(\$0.46)		
													004	TAX	(\$3.44)	\$0.00	(\$3.44)		
													002	TAX	(\$44.09)	\$0.00	(\$44.09)		
Refund																	\$79.62		
THIEM, STEPHANIE DAWN	THIEM, STEPHANIE DAWN	4004 PINEBROOK LN	WAXHAW, NC 28173	Proration	0083467303	RJH8295	AUTHORIZED	932548064	Refund Generated due to proration on Bill #0083467303-2024-0000-00	Vehicle Sold	8/28/2025	8/29/2025	001	TAX	(\$13.97)	\$0.00	(\$13.97)		
													500	TAX	(\$32.96)	\$0.00	(\$32.96)		
													500	VEHICLE FEE	\$0.00	\$0.00	\$0.00		
													028	TAX	(\$4.47)	\$0.00	(\$4.47)		
													003	TAX	(\$1.49)	\$0.00	(\$1.49)		
													005	TAX	(\$0.33)	\$0.00	(\$0.33)		
													004	TAX	(\$2.50)	\$0.00	(\$2.50)		
002	TAX	(\$32.04)	\$0.00	(\$32.04)															
Refund																	\$87.76		
THIEMANN, AMY VERNON	THIEMANN, AMY VERNON	6419 MCNEELY RD	WAXHAW, NC 28173	Adjustment < \$100	0053043208	HCT3904	PENDING	815320359	Refund Generated due to adjustment on Bill #0053043208-2024-2024-0000-00	Over Assessment	8/26/2025		001	TAX	(\$5.00)	\$0.00	(\$5.00)		
													990	TAX	(\$0.65)	\$0.00	(\$0.65)		
													015	TAX	(\$1.70)	\$0.00	(\$1.70)		
													003	TAX	(\$0.53)	\$0.00	(\$0.53)		
													005	TAX	(\$0.12)	\$0.00	(\$0.12)		
													004	TAX	(\$0.90)	\$0.00	(\$0.90)		
													002	TAX	(\$11.46)	\$0.00	(\$11.46)		
Refund																	\$20.36		
THOMAS, LARRY CALVIN	THOMAS, LARRY CALVIN	1413 WILLIAMSBURG LN	MONROE, NC 28110	Proration	0075310310	CP55326	AUTHORIZED	696840288	Refund Generated due to proration on Bill #0075310310-2024-2024-0000-00	Vehicle Sold	8/13/2025	8/14/2025	001	TAX	(\$34.00)	\$0.00	(\$34.00)		
													200	TAX	(\$104.67)	\$0.00	(\$104.67)		
													003	TAX	(\$3.65)	\$0.00	(\$3.65)		
													005	TAX	(\$0.81)	\$0.00	(\$0.81)		
													004	TAX	(\$6.08)	\$0.00	(\$6.08)		
													002	TAX	(\$77.95)	\$0.00	(\$77.95)		
													Refund						
THOMAS, VICTORIA MICHAEL	THOMAS, VICTORIA MICHAEL	1137 ARINGILL LN	MATTHEWS, NC 28104	Proration	0063024860	HET8704	AUTHORIZED	813948548	Refund Generated due to proration on Bill #0063024860-2024-2024-0000-00	Vehicle Totalled	8/18/2025	8/19/2025	001	TAX	(\$21.56)	\$0.00	(\$21.56)		
													600	TAX	(\$24.45)	\$0.00	(\$24.45)		
													020	TAX	(\$7.07)	\$0.00	(\$7.07)		
													003	TAX	(\$2.31)	\$0.00	(\$2.31)		
													005	TAX	(\$0.51)	\$0.00	(\$0.51)		
													004	TAX	(\$3.86)	\$0.00	(\$3.86)		
													002	TAX	(\$49.45)	\$0.00	(\$49.45)		
Refund																	\$109.21		
THOMPSON, KIMBERLY LYNN	THOMPSON, KIMBERLY LYNN	1008 AFTERNOON SUN RD	STALLINGS, NC 28104	Proration	0076725999	HKP4326	AUTHORIZED	815981621	Refund Generated due to proration on Bill #0076725999-2024-2024-0000-00	Vehicle Sold	8/28/2025	8/29/2025	001	TAX	(\$9.75)	\$0.00	(\$9.75)		
													700	TAX	(\$12.91)	\$0.00	(\$12.91)		
													023	TAX	(\$3.06)	\$0.00	(\$3.06)		
													003	TAX	(\$1.04)	\$0.00	(\$1.04)		
													005	TAX	(\$0.23)	\$0.00	(\$0.23)		
													004	TAX	(\$1.74)	\$0.00	(\$1.74)		
													002	TAX	(\$22.36)	\$0.00	(\$22.36)		
Refund																	\$51.09		
TORREZ MORENO, RICHARD	TORREZ MORENO, RICHARD	1937 TIN ROOF LN	MONROE, NC 28112	Proration	0081821820	LFA8384	AUTHORIZED	813947127	Refund Generated due to proration on Bill #0081821820-2024-2024-0000-00	Vehicle Sold	8/18/2025	8/19/2025	001	TAX	(\$2.02)	\$0.00	(\$2.02)		
													200	TAX	(\$6.24)	\$0.00	(\$6.24)		
													200	VEHICLE FEE	\$0.00	\$0.00	\$0.00		
													003	TAX	(\$0.22)	\$0.00	(\$0.22)		
													005	TAX	(\$0.05)	\$0.00	(\$0.05)		
													004	TAX	(\$0.37)	\$0.00	(\$0.37)		
													002	TAX	(\$4.65)	\$0.00	(\$4.65)		
Refund																	\$13.55		
TYSON, ALICIA BATTEN	TYSON, ALICIA BATTEN	6024 MCWHORTER RD	WAXHAW, NC 28173	Proration	0047070111	FHW2713	AUTHORIZED	696184404	Refund Generated due to proration on Bill #0047070111-2024-2024-0000-00	Vehicle Totalled	8/8/2025	8/12/2025	001	TAX	(\$6.72)	\$0.00	(\$6.72)		
													015	TAX	(\$2.27)	\$0.00	(\$2.27)		
													003	TAX	(\$0.72)	\$0.00	(\$0.72)		
													005	TAX	(\$0.16)	\$0.00	(\$0.16)		
													004	TAX	(\$1.20)	\$0.00	(\$1.20)		
													002	TAX	(\$15.40)	\$0.00	(\$15.40)		
													Refund						



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Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change													
UDAYAKUMAR, UTHAMAN	UDAYAKUMAR, UTHAMAN		213 BARCLAY DR		WAXHAN, NC 28173	Proration	0066191185	JHM6259	AUTHORIZED	938559768	Refund Generated due to proration on Bill #0066191185-2024-2024-0000-00	Vehicle Sold	8/20/2025	8/21/2025	001	TAX	(\$22.75)	\$0.00	(\$22.75)													
															500	TAX	(\$53.67)	\$0.00	(\$53.67)													
															500	VEHICLE FEE	(\$25.00)	\$0.00	(\$25.00)													
															028	TAX	(\$7.29)	\$0.00	(\$7.29)													
															003	TAX	(\$2.44)	\$0.00	(\$2.44)													
															005	TAX	(\$0.54)	\$0.00	(\$0.54)													
															004	TAX	(\$4.07)	\$0.00	(\$4.07)													
															002	TAX	(\$52.16)	\$0.00	(\$52.16)													
															Refund																	
															\$167.92																	
UNION COUNTY COMMUNITY ACTION INC	UNION COUNTY COMMUNITY ACTION INC		PO BOX 1029		MONROE, NC 28111	Adjustment < \$100	0080062004	LDP252	PENDING	811993896	Refund Generated due to adjustment on Bill #0080062004-2024-2024-0000-00	Exempt Property	8/7/2025		001	TAX	(\$4.52)	\$0.00	(\$4.52)													
															200	TAX	(\$13.92)	\$0.00	(\$13.92)													
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)													
															003	TAX	(\$0.48)	\$0.00	(\$0.48)													
															005	TAX	(\$0.11)	\$0.00	(\$0.11)													
															004	TAX	(\$0.81)	\$0.00	(\$0.81)													
															002	TAX	(\$10.37)	\$0.00	(\$10.37)													
															Refund																	
															\$60.21																	
															VALDIVIA, CHELSEA SINCLAIRE	VALDIVIA, CHELSEA SINCLAIRE		1029 FORBISHIRE DR		MATTHEWS, NC 28104	Proration	0080937607	VEP4304	AUTHORIZED	813428798	Refund Generated due to proration on Bill #0080937607-2024-2024-0000-00	Vehicle Sold	8/15/2025	8/18/2025	001	TAX	(\$12.46)
600	TAX	(\$14.12)	\$0.00	(\$14.12)																												
020	TAX	(\$4.08)	\$0.00	(\$4.08)																												
003	TAX	(\$1.33)	\$0.00	(\$1.33)																												
005	TAX	(\$0.30)	\$0.00	(\$0.30)																												
004	TAX	(\$2.23)	\$0.00	(\$2.23)																												
002	TAX	(\$28.57)	\$0.00	(\$28.57)																												
Refund																																
\$63.09																																
VERENICH, YELENA	VERENICH, YELENA		6910 PLAIN VIEW RD		MONROE, NC 28110	Proration	0083255519	VEW5683	AUTHORIZED	811128136	Refund Generated due to proration on Bill #0083255519-2024-2024-0000-00	Vehicle Sold	8/5/2025	8/6/2025																001	TAX	(\$2.11)
															600	TAX	(\$2.40)	\$0.00	(\$2.40)													
															019	TAX	(\$0.83)	\$0.00	(\$0.83)													
															003	TAX	(\$0.23)	\$0.00	(\$0.23)													
															005	TAX	(\$0.05)	\$0.00	(\$0.05)													
															004	TAX	(\$0.38)	\$0.00	(\$0.38)													
															002	TAX	(\$4.85)	\$0.00	(\$4.85)													
															Refund																	
															\$10.85																	
															VORONIN, SERHII	VORONIN, SERHII		1008 RAYWOOD CT		MATTHEWS, NC 28104	Proration	0085571651	VFZ1972	AUTHORIZED	815319911	Refund Generated due to proration on Bill #0085571651-2024-2024-0000-00	Vehicle Sold	8/26/2025	8/27/2025	001	TAX	(\$9.92)
600	TAX	(\$11.26)	\$0.00	(\$11.26)																												
020	TAX	(\$3.26)	\$0.00	(\$3.26)																												
003	TAX	(\$1.07)	\$0.00	(\$1.07)																												
005	TAX	(\$0.23)	\$0.00	(\$0.23)																												
004	TAX	(\$1.77)	\$0.00	(\$1.77)																												
002	TAX	(\$22.77)	\$0.00	(\$22.77)																												
Refund																																
\$50.28																																
WADDLE, CHRISTINE STRIPLING	WADDLE, CHRISTINE STRIPLING	WADDLE, TIMOTHY BROOKS JR	1516 SUNFLOWER FIELD PL		MATTHEWS, NC 28104	Proration	0078600946	KHE9516	AUTHORIZED	810638794	Refund Generated due to proration on Bill #0078600946-2023-2023-0000-00	Vehicle Sold	8/1/2025	8/4/2025																001	TAX	(\$5.41)
															700	TAX	(\$6.17)	\$0.00	(\$6.17)													
															020	TAX	(\$1.58)	\$0.00	(\$1.58)													
															003	TAX	(\$0.58)	\$0.00	(\$0.58)													
															005	TAX	(\$0.13)	\$0.00	(\$0.13)													
															004	TAX	(\$0.97)	\$0.00	(\$0.97)													
															002	TAX	(\$12.41)	\$0.00	(\$12.41)													
															Refund																	
															\$27.25																	
															WADDLE, TIMOTHY BROOKS JR	WADDLE, TIMOTHY BROOKS JR		1516 SUNFLOWER FIELD PL		MATTHEWS, NC 28104	Proration	0078600756	KHL4717	AUTHORIZED	810639165	Refund Generated due to proration on Bill #0078600756-2024-2024-0000-00	Vehicle Sold	8/1/2025	8/4/2025	001	TAX	(\$18.73)
700	TAX	(\$24.79)	\$0.00	(\$24.79)																												
020	TAX	(\$6.14)	\$0.00	(\$6.14)																												
003	TAX	(\$2.01)	\$0.00	(\$2.01)																												
005	TAX	(\$0.45)	\$0.00	(\$0.45)																												
004	TAX	(\$3.35)	\$0.00	(\$3.35)																												
002	TAX	(\$42.94)	\$0.00	(\$42.94)																												
Refund																																
\$98.41																																
WALKER, LAUREN NICOLE	WALKER, LAUREN NICOLE	WALKER, LUKE ALBERT	6035 ABERGELE LN		MATTHEWS, NC 28104	Proration	0083624430	DAE3980	AUTHORIZED	815979563	Refund Generated due to proration on Bill #0083624430-2024-2024-0000-00	Vehicle Sold	8/28/2025	8/29/2025																001	TAX	(\$6.78)
															200	TAX	(\$20.88)	(\$1.52)	(\$22.40)													
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00													
															003	TAX	(\$0.73)	(\$0.05)	(\$0.78)													
															005	TAX	(\$0.16)	(\$0.01)	(\$0.17)													
															004	TAX	(\$1.21)	(\$0.09)	(\$1.30)													
															002	TAX	(\$15.55)	(\$1.13)	(\$16.68)													
															Refund																	
															\$48.60																	
															WALKUP, BETTY CASKEY	WALKUP, BETTY CASKEY		7201 TIRZAH CHURCH RD		WAXHAN, NC 28173	Proration	0025879186	VNW6944	AUTHORIZED	694832148	Refund Generated due to proration on Bill #0025879186-2023-2023-0000-00	Vehicle Sold	8/1/2025	8/4/2025	001	TAX	(\$0.62)
025	TAX	(\$0.15)	\$0.00	(\$0.15)																												
003	TAX	(\$0.07)	\$0.00	(\$0.07)																												
005	TAX	(\$0.01)	\$0.00	(\$0.01)																												
004	TAX	(\$0.11)	\$0.00	(\$0.11)																												
002	TAX	(\$1.42)	\$0.00	(\$1.42)																												
Refund																																
\$2.38																																



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
WATERS, STEVE WAYNE	WATERS, STEVE WAYNE		2025 UNION GROVE LN	INDIAN TRAIL, NC 28079	Proration	0077316597	K3B2809	AUTHORIZED	811095460	Refund Generated due to proration on Bill #0077316597-2024-2024-0000-00	Vehicle Sold	8/4/2025	8/5/2025	001	TAX	(\$13.15)	\$0.00	(\$13.15)	
														600	TAX	(\$14.91)	\$0.00	(\$14.91)	
														023	TAX	(\$4.13)	\$0.00	(\$4.13)	
														003	TAX	(\$1.41)	\$0.00	(\$1.41)	
														005	TAX	(\$0.31)	\$0.00	(\$0.31)	
														004	TAX	(\$2.35)	\$0.00	(\$2.35)	
														002	TAX	(\$30.16)	\$0.00	(\$30.16)	
Refund																			
\$66.42																			
WATTS, PAUL DAVID	WATTS, PAUL DAVID		6106 BUD HUEY RD	WAXHAW, NC 28173	Adjustment < \$100	0086409796	AV31965	PENDING	695224704	Refund Generated due to adjustment on Bill #0086409796-2025-2025-0000-00	Over Assessment	8/4/2025		001	TAX	(\$4.40)	\$0.00	(\$4.40)	
														025	TAX	(\$1.75)	\$0.00	(\$1.75)	
														003	TAX	(\$0.42)	\$0.00	(\$0.42)	
														005	TAX	(\$0.18)	\$0.00	(\$0.18)	
														004	TAX	(\$1.52)	\$0.00	(\$1.52)	
														002	TAX	(\$10.50)	\$0.00	(\$10.50)	
														Refund					
\$18.77																			
WEAVER, MICHAEL WILLIAM	WEAVER, MICHAEL WILLIAM		2325 PLEASANT GROVE CH RD	MARSHVILLE, NC 28103	Proration	0059327865	ELZ6214	AUTHORIZED	697044162	Refund Generated due to proration on Bill #0059327865-2024-2024-0000-00	Vehicle Sold	8/14/2025	8/15/2025	001	TAX	(\$21.34)	\$0.00	(\$21.34)	
														017	TAX	(\$7.69)	\$0.00	(\$7.69)	
														003	TAX	(\$2.29)	\$0.00	(\$2.29)	
														005	TAX	(\$0.51)	\$0.00	(\$0.51)	
														004	TAX	(\$3.82)	\$0.00	(\$3.82)	
														002	TAX	(\$48.92)	\$0.00	(\$48.92)	
														Refund					
\$84.57																			
WEBBER, PAUL DAVID	WEBBER, PAUL DAVID		3907 HORSHAM ST	INDIAN LAND, SC 29707	Proration	0072671608	HC87370	AUTHORIZED	695252628	Refund Generated due to proration on Bill #0072671608-2023-2023-0000-00	Reg . Out of state	8/5/2025	8/6/2025	001	TAX	(\$10.31)	\$0.00	(\$10.31)	
														800	TAX	(\$2.84)	\$0.00	(\$2.84)	
														003	TAX	(\$1.11)	\$0.00	(\$1.11)	
														005	TAX	(\$0.25)	\$0.00	(\$0.25)	
														004	TAX	(\$1.84)	\$0.00	(\$1.84)	
														002	TAX	(\$23.65)	\$0.00	(\$23.65)	
														Refund					
\$40.00																			
WEBBER, PAUL DAVID	WEBBER, PAUL DAVID		3907 HORSHAM ST	INDIAN LAND, SC 29707	Proration	0054961366	PMX2125	AUTHORIZED	811128080	Refund Generated due to proration on Bill #0054961366-2024-2024-0000-00	Reg . Out of state	8/5/2025	8/6/2025	001	TAX	(\$14.00)	\$0.00	(\$14.00)	
														800	TAX	(\$2.14)	\$0.00	(\$2.14)	
														026	TAX	(\$3.41)	\$0.00	(\$3.41)	
														003	TAX	(\$1.50)	\$0.00	(\$1.50)	
														005	TAX	(\$0.33)	\$0.00	(\$0.33)	
														004	TAX	(\$2.50)	\$0.00	(\$2.50)	
														002	TAX	(\$32.10)	\$0.00	(\$32.10)	
Refund																			
\$55.98																			
WILLIAMS, MICHAEL NATHANIEL JR	WILLIAMS, MICHAEL NATHANIEL JR		201 SPRING HILL RD	MATTHEWS, NC 28104	Proration	0078695913	TJS8148	AUTHORIZED	812979846	Refund Generated due to proration on Bill #0078695913-2023-2023-0000-00	Vehicle Sold	8/13/2025	8/14/2025	001	TAX	(\$1.05)	\$0.00	(\$1.05)	
														700	TAX	(\$1.19)	\$0.00	(\$1.19)	
														020	TAX	(\$0.31)	\$0.00	(\$0.31)	
														003	TAX	(\$0.11)	\$0.00	(\$0.11)	
														005	TAX	(\$0.02)	\$0.00	(\$0.02)	
														004	TAX	(\$0.19)	\$0.00	(\$0.19)	
														002	TAX	(\$2.40)	\$0.00	(\$2.40)	
Refund																			
\$5.27																			
WILLIAMS, TODD CHRISTOPHER	WILLIAMS, TODD CHRISTOPHER		1007 STANBURY DR	MATTHEWS, NC 28104	Proration	0075590284	KMN3734	AUTHORIZED	815321633	Refund Generated due to proration on Bill #0075590284-2024-2024-0000-00	Vehicle Sold	8/26/2025	8/27/2025	001	TAX	(\$4.21)	\$0.00	(\$4.21)	
														600	TAX	(\$4.77)	\$0.00	(\$4.77)	
														020	TAX	(\$1.38)	\$0.00	(\$1.38)	
														003	TAX	(\$0.45)	\$0.00	(\$0.45)	
														005	TAX	(\$0.10)	\$0.00	(\$0.10)	
														004	TAX	(\$0.75)	\$0.00	(\$0.75)	
														002	TAX	(\$9.65)	\$0.00	(\$9.65)	
Refund																			
\$21.31																			
WILSON, MIRANDA JO	WILSON, MIRANDA JO	MCCLAIN, JANIS ALEXA	11 RANDOM TREE RD	KERSHAW, SC 29667	Proration	0075328866	KDM9749	AUTHORIZED	928244472	Refund Generated due to proration on Bill #0075328866-2024-2024-0000-00	Reg . Out of state	8/8/2025	8/12/2025	001	TAX	(\$4.21)	\$0.00	(\$4.21)	
														500	TAX	(\$27.98)	\$0.00	(\$27.98)	
														500	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
														028	TAX	(\$3.80)	\$0.00	(\$3.80)	
														003	TAX	(\$1.27)	\$0.00	(\$1.27)	
														005	TAX	(\$0.29)	\$0.00	(\$0.29)	
														004	TAX	(\$2.12)	\$0.00	(\$2.12)	
002	TAX	(\$27.20)	\$0.00	(\$27.20)															
Refund																			
\$74.52																			
YAROTSKIY, YEKATERINA	YAROTSKIY, YEKATERINA		2027 CITY LIGHTS DR	INDIAN TRAIL, NC 28079	Proration	0080866588	TJS1326	AUTHORIZED	815900739	Refund Generated due to proration on Bill #0080866588-2024-2024-0000-00	Vehicle Sold	8/28/2025	8/29/2025	001	TAX	(\$13.87)	\$0.00	(\$13.87)	
														600	TAX	(\$15.72)	\$0.00	(\$15.72)	
														023	TAX	(\$4.35)	\$0.00	(\$4.35)	
														003	TAX	(\$1.48)	\$0.00	(\$1.48)	
														005	TAX	(\$0.33)	\$0.00	(\$0.33)	
														004	TAX	(\$2.48)	\$0.00	(\$2.48)	
														002	TAX	(\$31.80)	\$0.00	(\$31.80)	
Refund																			
\$70.03																			
YEROMENKO, YEVHENII	YEROMENKO, YEVHENII		2348 MONARCH PRESERVE CIR	MONROE, NC 28110	Proration	0084321608	LHZ3245	AUTHORIZED	814240203	Refund Generated due to proration on Bill #0084321608-2024-2024-0000-00	Vehicle Sold	8/20/2025	8/21/2025	001	TAX	(\$30.23)	\$0.00	(\$30.23)	
														200	TAX	(\$93.09)	\$0.00	(\$93.09)	
														200	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
														003	TAX	(\$3.24)	\$0.00	(\$3.24)	
														005	TAX	(\$0.72)	\$0.00	(\$0.72)	
														004	TAX	(\$5.41)	\$0.00	(\$5.41)	
														002	TAX	(\$69.33)	\$0.00	(\$69.33)	
Refund																			
\$202.02																			



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
YOUNG, TIMON RAY	YOUNG, TIMON RAY		1228 HIGHWAY 218 W		INDIAN TRAIL, NC 28079	Proration	0073653617	PLB9205	AUTHORIZED	813989078	Refund Generated due to proration on Bill #0073653617-2024-2024-0000-00	Vehicle Sold	8/19/2025	8/20/2025	001	TAX	(\$26.53)	\$0.00	(\$26.53)
															930	TAX	(\$3.25)	\$0.00	(\$3.25)
															016	TAX	(\$9.84)	\$0.00	(\$9.84)
															003	TAX	(\$2.84)	\$0.00	(\$2.84)
															005	TAX	(\$0.63)	\$0.00	(\$0.63)
															004	TAX	(\$4.75)	\$0.00	(\$4.75)
															002	TAX	(\$60.82)	\$0.00	(\$60.82)
															Refund				
Refund Total																	\$20115.31		



Union County, NC

Staff Report

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

File #: 25-599

Agenda Date: 10/6/2025

TITLE:

Tax Collector's Departmental Report for August 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This report reflects the totals of all tax transactions within the Tax Collector's Office for the month of August 2025 as required by NCGS 105-350(7).

FINANCIAL IMPACT:

None.

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

From: Vann Harrell
Tax Administrator

Date: September 12, 2025

Re: Departmental Monthly Report

The Tax Collector's monthly/year to date collections report for the month ending August 29, 2025 is attached for your information and review.

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

Attachment

VH/JM

**AUGUST 2025
PERCENTAGE FOR REGULAR TAX**

AUGUST 29, 2025 REGULAR TAX	2025	2024	2023	2022	2021
BEGINNING CHARGE	271,062,516.93	237,247,534.79	226,155,147.38	217,039,806.70	208,197,353.02
TAX CHARGE					
PUBLIC UTILITIES CHARGE					
DISCOVERIES	82,917.32				
NON DISCOVERIES	387,270.09	19,222.44	18,968.47	18,968.08	
RELEASES	(65,887.55)	(5,256.66)	(5,455.51)	(333.85)	
TOTAL CHARGE	271,466,816.79	237,261,500.57	226,168,660.34	217,058,440.93	208,197,353.02
BEGINNING COLLECTIONS	350,451.84	236,915,063.72	226,049,986.32	216,971,803.23	208,143,583.34
COLLECTIONS	15,568,474.06	48,121.65	14,456.04	17,507.99	480.19
TOTAL COLLECTIONS	15,918,925.90	236,963,185.37	226,064,442.36	216,989,311.22	208,144,063.53
BALANCE OUTSTANDING	255,547,890.89	298,315.20	104,217.98	69,129.71	53,289.49
PERCENTAGE OF REGULAR	5.86%	99.87%	99.95%	99.97%	99.97%
OVERALL CHARGED	271,466,816.79	237,261,500.57	226,168,660.34	217,058,440.93	208,197,353.02
OVERALL COLLECTED	15,918,925.90	236,963,185.37	226,064,442.36	216,989,311.22	208,144,063.53
OVERALL PERCENTAGE	5.86%	99.87%	99.95%	99.97%	99.97%

**AUGUST 2025
PERCENTAGE FOR REGULAR TAX**

AUGUST 29, 2025 REGULAR TAX	2020	2019	2018	2017
BEGINNING CHARGE	192,181,689.64	186,540,147.30	180,717,811.44	186,663,147.61
TAX CHARGE				
PUBLIC UTILITIES CHARGE				
DISCOVERIES				
NON DISCOVERIES				
RELEASES				
TOTAL CHARGE	192,181,689.64	186,540,147.30	180,717,811.44	186,663,147.61
BEGINNING COLLECTIONS	192,110,426.76	186,442,503.75	180,659,758.09	186,615,936.26
COLLECTIONS	9.79	137.54	4.00	(112.00)
TOTAL COLLECTIONS	192,110,436.55	186,442,641.29	180,659,762.09	186,615,824.26
BALANCE OUTSTANDING	71,253.09	97,506.01	58,049.35	47,323.35
PERCENTAGE OF REGULAR	99.96%	99.95%	99.97%	99.97%
OVERALL CHARGED	192,181,689.64	186,540,147.30	180,717,811.44	186,663,147.61
OVERALL COLLECTED	192,110,436.55	186,442,641.29	180,659,762.09	186,615,824.26
OVERALL PERCENTAGE	99.96%	99.95%	99.97%	99.97%

**AUGUST 2025
PERCENTAGE FOR REGULAR TAX**

AUGUST 29, 2025 REGULAR TAX	2016
BEGINNING CHARGE	176,859,604.37
TAX CHARGE	
PUBLIC UTILITIES CHARGE	
DISCOVERIES	
NON DISCOVERIES	
RELEASES	
TOTAL CHARGE	176,859,604.37
BEGINNING COLLECTIONS	176,820,453.45
COLLECTIONS	(59.23)
TOTAL COLLECTIONS	176,820,394.22
BALANCE OUTSTANDING	39,210.15
PERCENTAGE OF REGULAR	99.98%
OVERALL CHARGED	176,859,604.37
OVERALL COLLECTED	176,820,394.22
OVERALL PERCENTAGE	99.98%



Union County, NC

Staff Report

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

File #: 25-605

Agenda Date: 10/6/2025

TITLE:

Consider a Step 2 Economic Development Incentive Grant Request to Safe Fire Detection, Inc. (Project Smokey)

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Award a Step 2 Economic Development Incentive Grant to Safe Fire Detection, Inc. (Project Smokey) in an amount not-to-exceed \$141,000 over a five-year period; and 2) authorize the County Manager to i) negotiate and execute an agreement substantially consistent with this agenda item, ii) exercise any renewal or extension term options set forth in the Agreement, and iii) terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.

PRIOR BOARD ACTIONS:

October 6, 2025, Regular Meeting, Agenda Item # 25-604 - Public Hearing Held

BACKGROUND:

The Union County Economic Development Department started conversations with Safe Fire Detection, Inc under codename Project Smokey in 2023 about the potential relocation of their manufacturing operation from Indian Trail, NC, to a 10-acre parcel located within the Piedmont Innovation Industrial Park off Goldmine Road or a 14-acre parcel located in the Monroe Corporate Center. The company is considering the purchase of either the 10-acre parcel or the 14-acre parcel, the construction of a 40,000 square foot manufacturing facility, and the purchase and installation of new production equipment. Total capital investment is approximately \$10,000,000.

Safe Fire Detection, Inc. is a manufacturer of advanced fire detection systems for several key industry sectors including nuclear power, electric utilities, Petro-chemical, and space exploration. The company opened its doors in 1985 in Indian Trail. They have grown to employ 25 people, of whom 16 are Union County residents.

The company is at capacity at its current location and needs a building and land large enough to accommodate future business growth. The purchase of either parcel and the construction of a 40,000 SF facility would satisfy growth needs for years to come.

Based on the anticipated capital investment, it is proposed that the Board award a STEP 2 Economic Development Incentive Grant in an amount-not-to-exceed \$141,000 paid over a 5-year period beginning in FY 2028. The value of the incentive grant will be based upon appraised value each year as appraised by the Union County Tax Administration Office. This grant is based on the company's

projected investment of approximately \$10,000,000 in land, new building construction, and purchase and installation of new manufacturing equipment over the grant period, but not less than \$2,000,000. Based on its projected investment in Union County, the current tax rate, and assuming a consistent assessed value with no depreciation, the company will pay estimated ad valorem taxes on the new taxable investment in the amount of \$217,000 over the grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.

The grant is also contingent upon the company retaining its current number of employees located within Union County and creating a minimum of 10 new full-time jobs.

FINANCIAL IMPACT:

The project, if brought to Union County, would have an economic development incentive grant in an amount-not-to-exceed \$141,000 but would generate approximately \$217,000 in ad valorem taxes over the 5-year grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.



Union County, NC

Staff Report

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

File #: 25-550

Agenda Date: 10/6/2025

TITLE:

Wastewater Pump Station Approval Request - Sanctuary at Southgate Phase II Development

INFORMATION CONTACT:

Brian Matthews, County Manager, 704-292-2597

ACTION REQUESTED:

Receive information on the request for approval of a wastewater pump station to serve the proposed Sanctuary at Southgate Phase II development and approve or deny as appropriate.

PRIOR BOARD ACTIONS:

February 18, 2025, Regular Meeting, Agenda Item # 25-053 - Received and denied the wastewater pump station approval request for the Sanctuary at Southgate Phase II Development.

BACKGROUND:

Pursuant to documentation requirements and amendments to the Union County Code of Ordinances adopted by the Board of Commissioners, the use of wastewater pump stations for sewer extensions requires approval by the Board of Commissioners. Per the Ordinance, developers are allowed to resubmit approval requests once six months have passed from any prior Board action.

BGE Inc. has prepared and submitted documentation regarding the proposed Sanctuary at Southgate Phase II development. The documents have been reviewed by UCW staff and were found to comply with the adopted requirements.

The proposed Sanctuary at Southgate Phase II Development is unchanged from the original submittal.

FINANCIAL IMPACT:

None.

Sanctuary at Southgate Pump Station Request

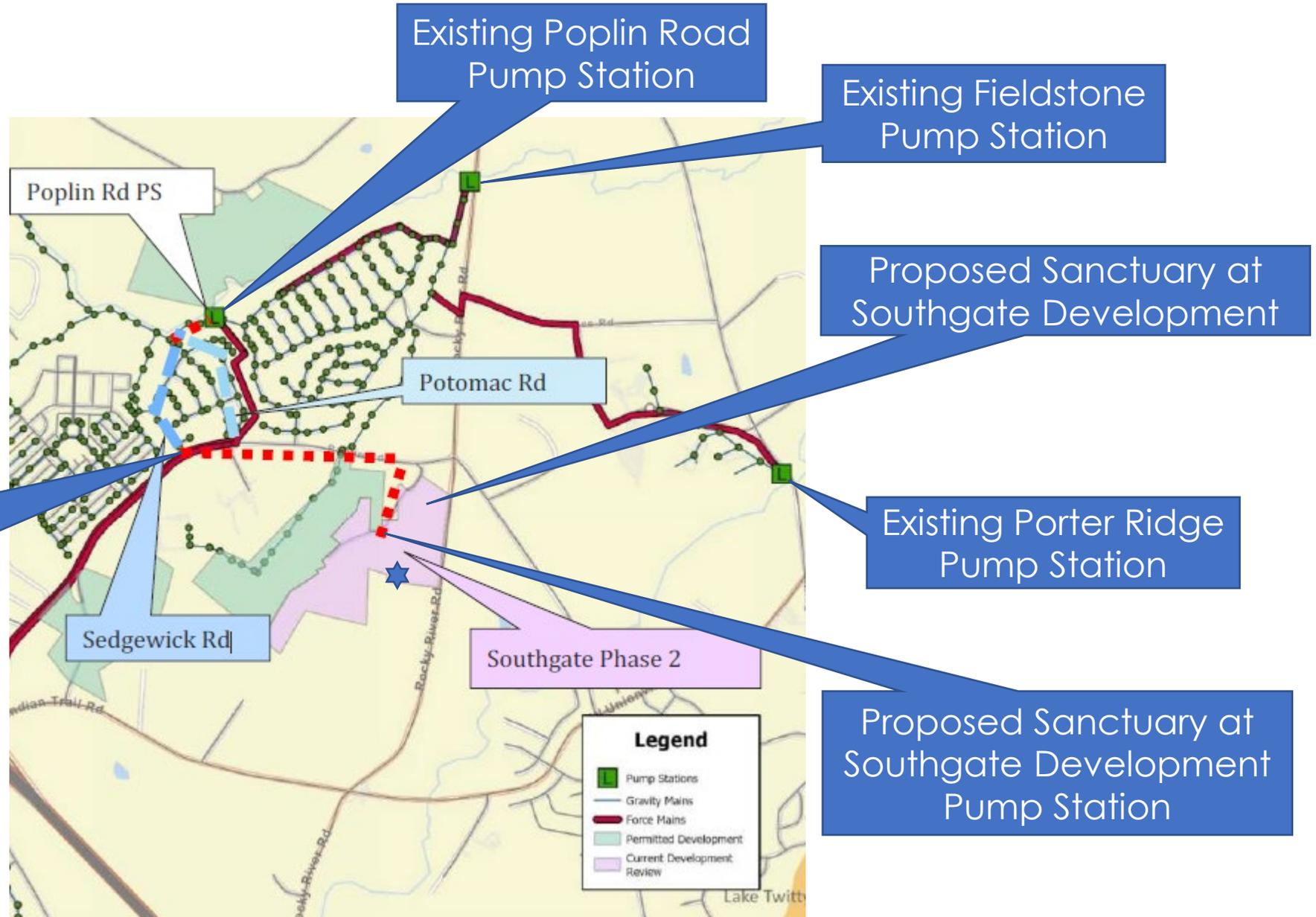
Board of County Commissioners
October 6, 2025



UNIONCOUNTY
WATER

Location Map

Located at the southwest corner of the intersection of Rocky River and Poplin Roads



Proposed Sanctuary at Southgate Development Force Main Discharge

Proposed Sanctuary at Southgate Development

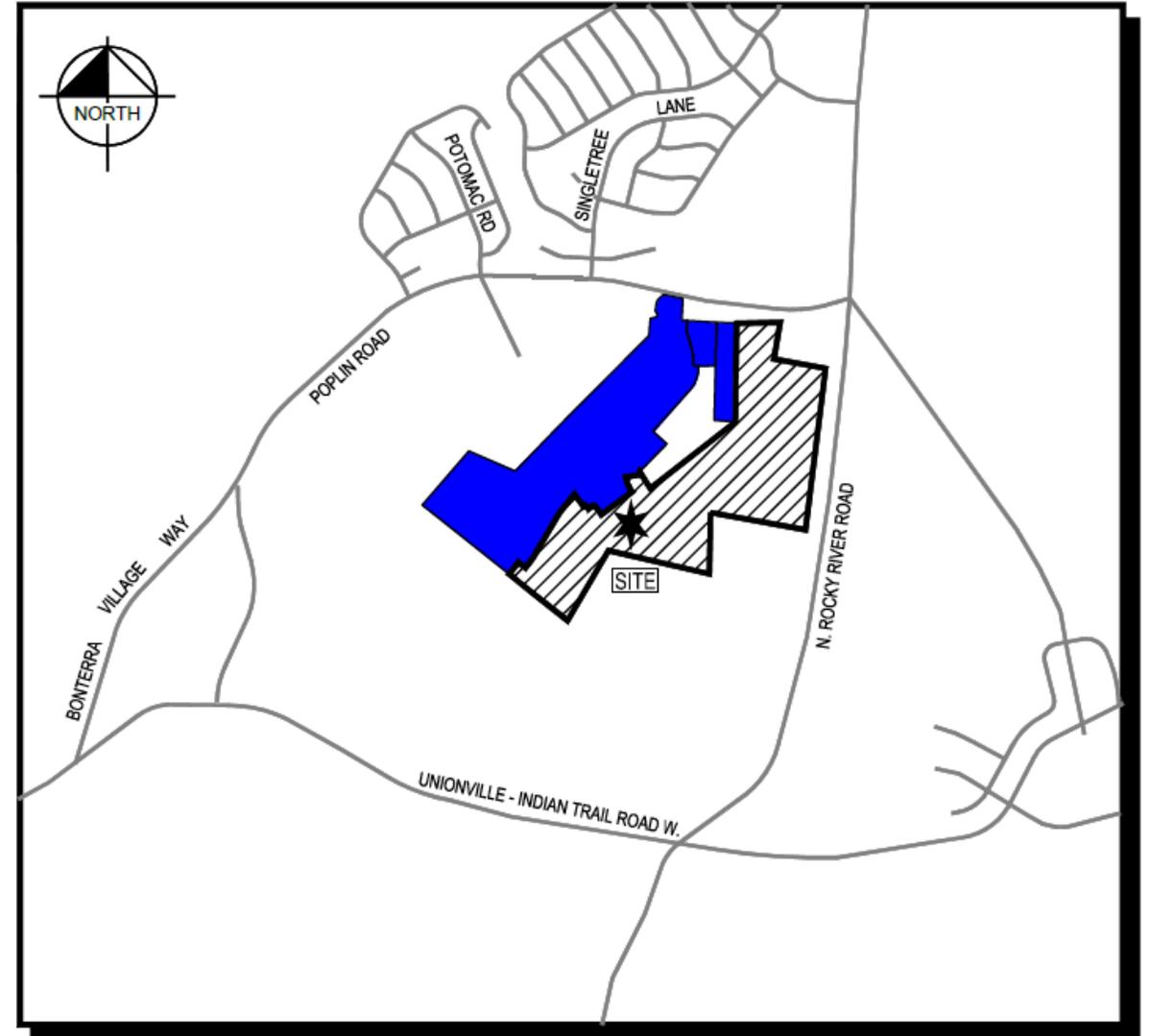
Existing Porter Ridge Pump Station

Proposed Sanctuary at Southgate Development Pump Station

Proposed Development Service Areas

Description	Area
Sanctuary at Southgate Development	72 Acres
Total	72 Acres

- Service area is within the Town of Indian Trail
- Service area is limited to the proposed Sanctuary at Southgate Development



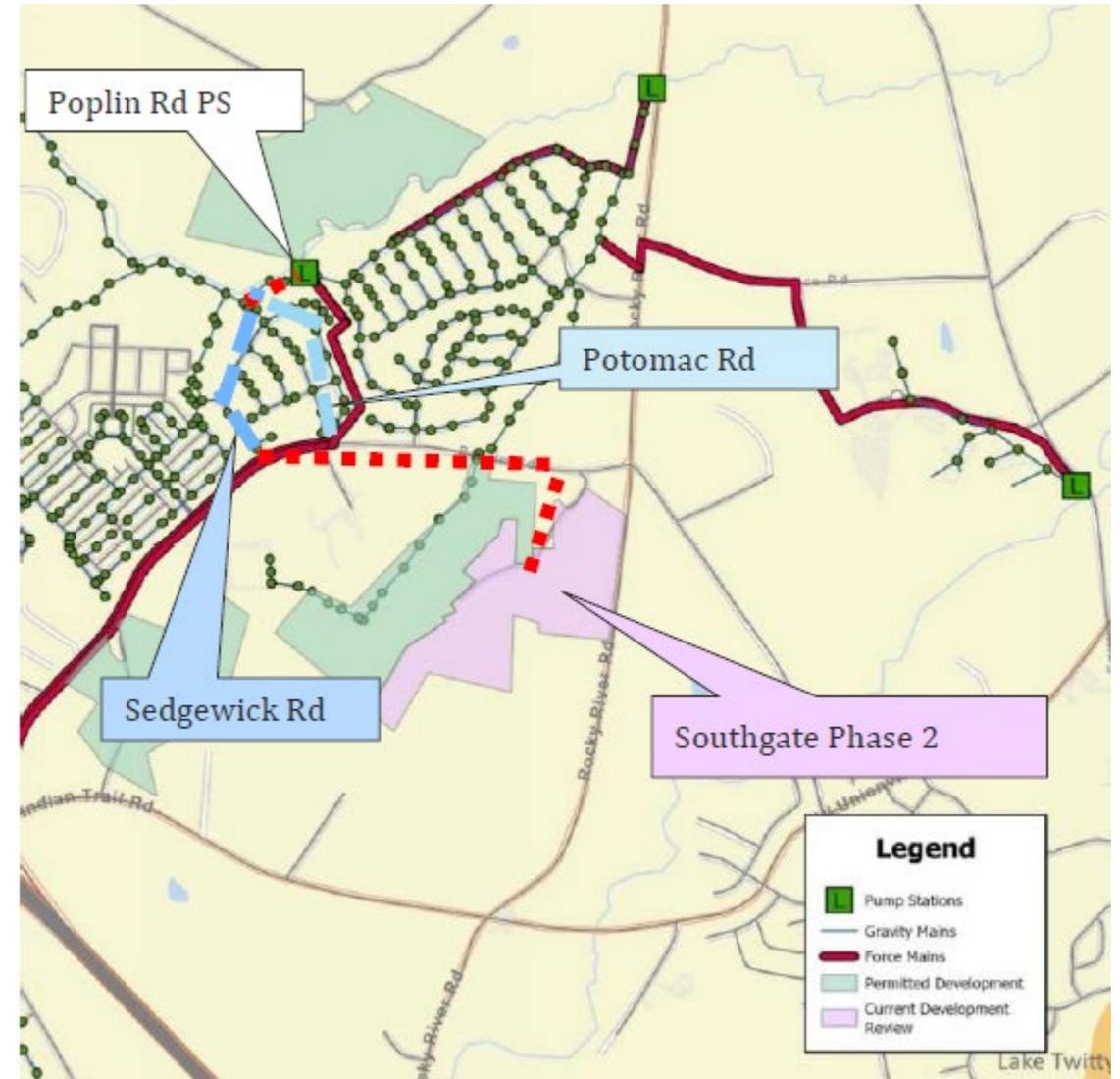
SITE LOCATION MAP
NOT TO SCALE

- Phase I
- Phase II

Alternative 1

On Site Pump Station

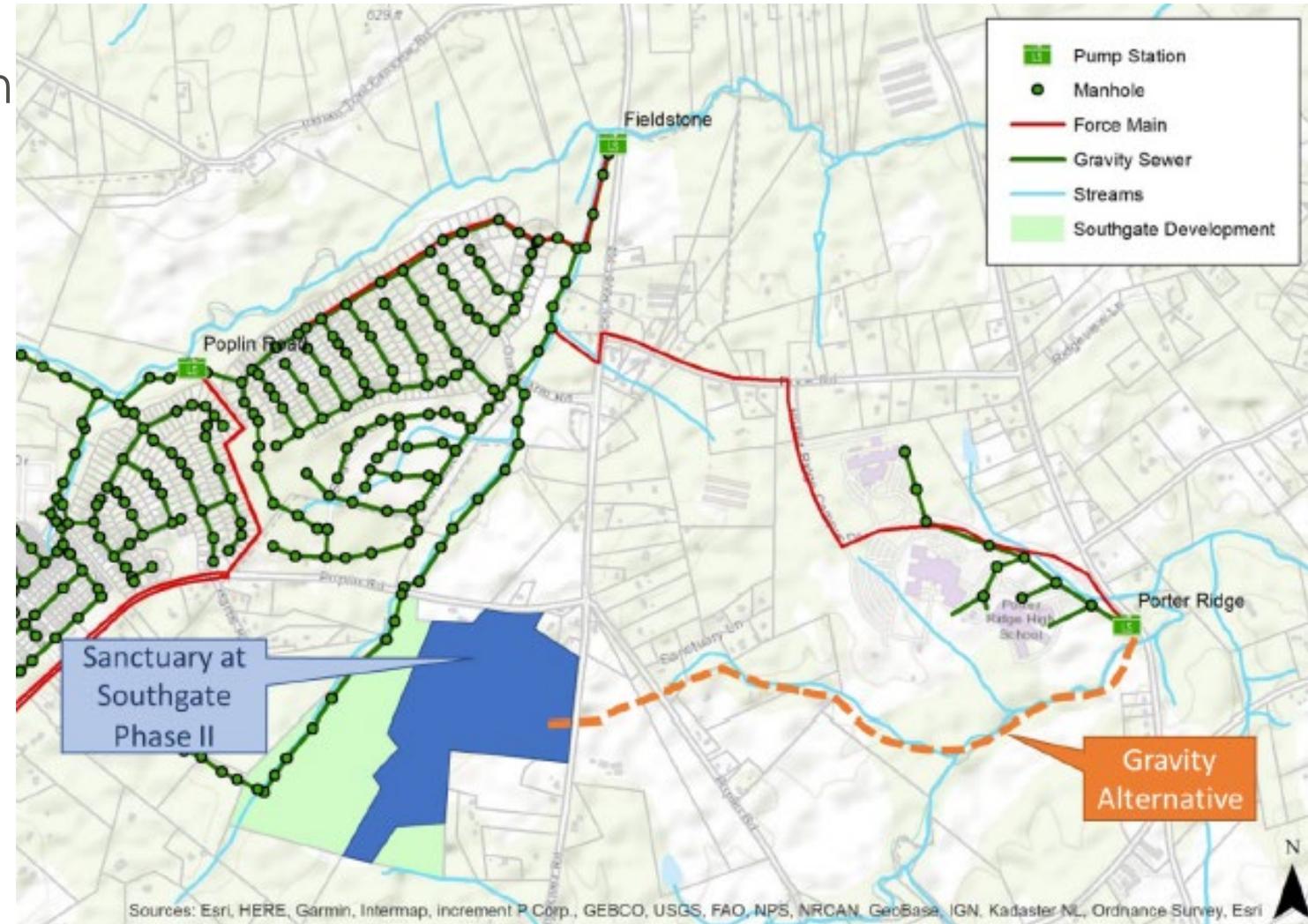
- 💧 Pump station to serve proposed development
- 💧 Proposed discharge to existing gravity system at the intersection of Poplin and Sedgewick or Potomac Roads
- 💧 Flow is conveyed to Poplin Road pump station and treated at 12-Mile Creek WRF
- 💧 Life Cycle Cost of \$2.1M
- 💧 Developer contributing \$0.9M to cover estimated 20-year maintenance costs



Alternative 2

Gravity Connection and Existing Pump Station Upgrades

- Gravity sewer connection to existing Porter Ridge Pump Station
- Adds 97,870 GPD to the Porter Ridge and Fieldstone pump stations
- Upsizing required for both Porter Ridge and Fieldstone pump stations
- Flow is ultimately conveyed to Poplin Road pump station and treated at 12-Mile Creek WRF (unchanged from Alternative 1)
- Life Cycle Cost of \$3.6M



Utility Based Rationale

Approval	Denial
Proposed development is ultimately served by the Poplin Road pump station regardless of selected alternative	Alternative 2 will require additional improvements to two existing pump stations
Alternative 2 requires capacity improvements to two existing pump stations and is a costlier option to serve the proposed development for the utility when considering the life cycle costs	
Proposed development cannot be served by a gravity solution	

Requested Board Action

💧 For Approval:

- 💧 (i) Approve the application request concerning the Sanctuary at Southgate development for a wastewater pump station, as such pump station solution is set forth in the application associated with the request, in accordance with Section 34-336(b)(1) of the Union County Code; and (ii) adopt the utility-based rationale statement for approval.

💧 For Denial:

- 💧 (i) Deny the application request concerning the Sanctuary at Southgate development for a wastewater pump station, as such pump station solution is set forth in the application associated with the request, in accordance with Section 34-336(b)(1) of the Union County Code; and (ii) adopt the utility-based rationale statement for denial.



Questions?



UNIONCOUNTY
WATER



TECHNICAL MEMORANDUM

July 30, 2025

To: Union County Board of County Commissioners
500 N. Main Street, Suite 932
Monroe, NC 28112

From: BGE, Inc., on behalf of Applicant
1111 Metropolitan Ave, Suite 250
Charlotte, NC 28204

RE: Project 20241457 – Southgate Mixed Use Pump Station Alternatives Analysis

Dear Board of Commissioners,

Please see the attached documents for the Southgate Mixed Use Pump Station Alternatives Analysis. The Applicant for this project is Walton North Carolina, LLC, on behalf of itself in its capacity as owner and on behalf of all other owners in its capacity as manager, operator or agent, as applicable and Walton Southgate, LLC (Applicant).

On behalf of Applicant, BGE, Inc. (BGE) completed the pump station alternatives analysis for the proposed Southgate Mixed Use development to garner your approval for a new pump station. The proposed Southgate Mixed Use development is located in Union County, North Carolina, at the intersection of Poplin Road and North Rocky River Road (See Appendix 1) and is comprised of 75 single-family residential homes, a future mixed use development with multi-family units, clubhouse and pool, a future commercial development with mixed use retail shops, fast food restaurant, medical office, grocery, coffee shop, fuel center, car wash, restaurant, and a future fire station. The proposed development is within Union County's Twelve Mile Creek Water Reclamation Facility's service area via the Poplin Road Pump Station.

Applicant has reviewed the Future Land Use Plans for Union County and Indian Trail and believe the proposed pump station is well-suited for the larger goals of the municipality and the county. The Town of Indian Trail 2041 Future Land Use Plan, adopted 7/12/2022, identifies this area as a Walkable Activity Center. A Walkable Activity Center is home to a broad range of uses including commercial, office, and residential with an emphasis on promoting economic development.

The Union County 2050 Comprehensive Plan shows this area located in proximity to Community and Employment Centers located off Unionville-Indian Trail Road and the Monroe Expressway. Applicant believes a regional pump station fits both the economic goals of Indian Trail and Union County based on the planning and plans.

Applicant donated land to Indian Trail that has been identified for a future Fire Station. The funding for the Fire Station is discussed in the Union County Capital Improvement Plan and the proposed pump station would service the facility.

This Technical Memorandum outlines the proposed project, potential area to be served by the pump station, capacity analyses completed by Black & Veatch, and the pump station alternatives analysis

with life cycle cost calculations. The pump station alternatives analysis compares Alternative 1, including a proposed new on-site pump station with force main connecting to the existing gravity sewer infrastructure of the Annandale Subdivision, and Alternative 2, including a proposed gravity sewer main connecting to the Porter Ridge Pump Station (See Appendix 7). For Alternative 2, Black & Veatch completed an analysis outlining required upgrades to the existing Porter Ridge and Fieldstone Pump Stations.

The life cycle costs analysis determined the proposed Alternative 1 is more cost effective than Alternative 2 (See Total Life Cycle Cost Alternative Summary Table).

Total Life Cycle Cost Alternative Summary Table - NPV	
Alternative 1 - On-Site Pump Station with Gravity Sewer Connection at Annandale Subdivision	\$2,086,600.86
Alternative 2 - Off-Site Gravity Sewer Connection to Porter Ridge Pump Station	\$3,585,319.06
	DELTA \$1,498,718.20

In addition to Alternative 1 being more cost effective, the developer will assume the 20-year projected maintenance cost of \$919,441.58 for the on-site pump station in Alternative 1. This results in the Total Life Cycle Cost Alternative 1 NPV being equal to **\$1,167,159.28**, creating an even greater difference in cost between the two alternatives.

Based on the life cycle cost analysis for both pump station alternatives, a new on-site pump station receiving wastewater flows from the proposed Southgate Mixed Use development with connection to existing gravity sewer infrastructure of the Annandale subdivision, would be the best option for this project.

Please contact me (msinkovitz@bgeinc.com; 980.867.4497) with any questions or concerns.

Thank-you for your consideration.

Sincerely,

07/30/2025

Matthew J. Sinkovitz, P.E.
Senior Project Manager



July 30, 2025

Chris Clark, PE
Water and Wastewater Director
500 North Main Street
Monroe, NC 28112

Re: Application for pump station to serve Phase 2 of Sanctuary at Southgate

Dear Mr. Clark,

This law firm represents Walton North Carolina, LLC (on behalf of itself in its capacity as owner and on behalf of all other owners in its capacity as manager, operator, or agent, as applicable) and Walton Southgate, LLC as the Applicant. (Walton North Carolina, LLC and Walton Southgate, LLC are collectively referred to herein as “Walton”.) On June 5th, Walton submitted a new application pursuant to Code Section 34-336(b)(1) for approval of a pump station to serve Phase 2 of Sanctuary at Southgate. Unlike the first application which was denied by the Board of Commissioners, the new application provides that Walton will assume the pump station’s 20-year maintenance budget of \$919,441. It is my understanding that despite this substantial change in the new application, your department rejected the application on the basis that it was not “materially different” from the first application. For the following reasons, my client respectfully asks that you reconsider.

First, the new application is “materially” different. Walton’s assumption of maintenance costs addresses the Board’s purported rationale for denying the first application. The Board’s rationale statement explained that: “[t]he new pump station solution will require significant investment over time in a pump station which primarily serves one development, without the opportunity for significant revenue from other customer connections which would assist in offsetting such costs.” Clearly, maintenance costs were a “material” consideration in the Board’s denial of the first application; therefore, the new application’s commitment of almost a million dollars for future maintenance cannot be anything *other* than a “material” change from the first application.

Second, the County’s Code does not grant UCW the authority to refuse placing the new application on the agenda. Section 34-336(b)(1)(d) states: “After completion of UCW’s review of the application, UCW shall notify the developer that the review is complete. UCW shall send the application, any municipal input, and any other information UCW determines is appropriate for consideration of the application to the board...” The word “shall” is mandatory, meaning that UCW does not have the discretion necessary to withhold an application from review by the Commissioners.

UCW's refusal to place my client's new application on the Board's meeting agenda is similar to the situation addressed by the North Carolina Supreme Court in *Morningstar Marinas/Eaton Ferry, LLC v. Warren County*, 368 N.C. 360, 777 S.E.2d 733 (2015). In that case, the Warren County zoning administrator refused to forward a zoning appeal to the county's board of adjustment even though the controlling statute stated that the administrator "shall" transmit such appeals to the board of adjustment. *Marinas/Eaton Ferry, LLC*, 368 N.C. at 365-66. The Supreme Court affirmed the trial court's grant of a writ of mandamus ordering the administrator to place the matter on the agenda as requested. *Id.* at 367.

For the foregoing reasons, my client respectfully asks that you place the most recent pump station application on the Commissioners' meeting agenda for the August meeting.

Sincerely,

A handwritten signature in black ink that reads "John Scarbrough". The signature is written in a cursive, slightly slanted style.

John Scarbrough

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INTRODUCTION

Walton North Carolina, LLC, on behalf of itself in its capacity as owner and on behalf of all other owners in its capacity as manager, operator or agent, as applicable and Walton Southgate, LLC (Applicant) is seeking Union County Board of County Commissioners approval for the Southgate Mixed Use development. The project is located in Union County, North Carolina, at the intersection of Poplin Road and North Rocky River Road (See Appendix 1). The site includes a portion of parcel 07006001A, 07021015E, parcel 07009017, parcel 07006001B, and parcel 07009017A, totaling 61.2 acres (See Appendices 1 and 2). The Southgate Mixed Use development includes 75 single-family residential homes (by D.R. Horton, Sanctuary at Southgate Phase 2), a future multi-family development including 240 multi-family units (by Applicant), a future commercial development including a shopping center with food service (by others), with sanitary sewer infrastructure including gravity lines, on-site pump station, and force main. Applicant has started preliminary design on the commercial components and is actively marketing the spaces to well-known retailers. BGE prepared this Pump Station Alternatives Analysis to meet the requirements of Union County Code, Section 34-336, Para b.1.b. The analysis includes the (1) area to be served by the proposed pump station, (2) volume of wastewater flow to be generated by the development, (3) capacity analysis with necessary improvements identified to handle flow from the development, and (4) a pump station alternative analysis comparing the lifecycle costs of gravity and pump station sanitary sewer solutions for the development.

BACKGROUND

The area to be served by the proposed pump station totals approximately 74 acres and includes 75 single-family residential homes (by D.R. Horton), a future multi-family development (by Applicant), two future commercial developments (by others), and a future emergency response facility (by others) (See Appendix 2). The Utility Sketch Plan developed by BGE is included as Appendix 3.

BGE determined the total wastewater demand of the proposed Southgate Mixed Use development and the future multi-family, commercial, and the future emergency response facility serviced by the proposed pump station to be **97,870 GPD** (See Appendix 4). BGE utilized the total wastewater demand and determined the total peak wet weather wastewater flow design condition for the proposed pump station to be **177.20 GPM**, by applying the minimum peaking factor of 2.5 as outlined in the *NCDENR Minimum Design Criteria for the Permitting of Pump Stations and Force Mains* to all design daily flows, except the single family detached lots (See Appendix 4). BGE applied a peaking factor of 3 to the single family detached lots design daily flow per Black & Veatch's assumptions outlined in its Sanctuary at Southgate Phase 2 Wastewater Collection System Analyses (See Appendices 5 & 6).

Black & Veatch analyzes wastewater flows and provides wastewater collection system hydraulic modeling services for Union County Water (UCW). Black & Veatch completed two (2) Sanctuary at Southgate Phase II wastewater collection system analyses to determine impacts of the new development on wastewater flows in the receiving wastewater collection system.

Black & Veatch's first analysis, dated 4/26/2023 (See Appendix 5), analyzed two alternatives.

- Alternative 1 – On-Site Pump Station with Gravity Sewer Connection at Phase I. Alternative 1 includes an on-site pump station for the Sanctuary at Southgate Phase II development with force main discharging into the gravity sewers installed during the Sanctuary at Southgate Phase I development. “After being discharged to the Phase 1 sewer, wastewater will flow downstream by gravity to an existing 12-inch sewer. The flow travels through 5,200 feet of 12-inch sewer, the Fieldstone Pump Station, and 4,500 feet of 6-inch force main and then discharges to 1,300 feet of 8-inch gravity sewer that flows to the Poplin Road Pump Station” (Black & Veatch, 4/26/2023).
- Alternative 2 – Off-Site Gravity Sewer Connection to Porter Ridge Pump Station. Alternative 2 assumes construction of 4,700 feet of adequately sized sewer to convey project flows to the Porter Ridge service area. Sanctuary at Southgate Phase II development wastewater flows “would connect to a 3,100 LF 8-

inch gravity sewer leading to the Porter Ridge pump station, which discharges into the 12-inch Fieldstone service area collection sewer, approximately 8,000 LF downstream of the connection point indicated on the development's site utility plan" (Black & Veatch, 4/26/2023).

The findings and recommendations outlined in Black & Veatch's report, dated 4/26/2023, include:

- Evaluation of both the 12-inch and 8-inch gravity sewers associated with the Sanctuary at Southgate Phase II Development flows determined neither are predicted to surcharge under a 1-year storm event.
- Alternative 2 "has little effect on the analysis in terms of capacity based on the modeling results but requires the construction of off-site gravity sewer conveying flows to the Porter Ridge Pump Station service area. The Porter Ridge Pump Station capacity needs to be evaluated if [Alternative 2] is further considered."
- The allocation and firm capacities of the Fieldstone Pump Station are exceeded with the addition of the Sanctuary at Southgate Phase II development wastewater flows. "It is not recommended that the 0.44 MGD firm capacity of the [Fieldstone Pump Station] be exceeded."
- The allocation and firm capacities of the Poplin Road Pump Station are exceeded with the addition of the Sanctuary at Southgate Phase II development wastewater flows. "Approval for this development is dependent on completion of the CIP improvement project that will install adequate flow equalization at the Poplin Road Pump Station. Once an equalization tank is installed, the storage volume will be sufficient to prevent backup in the gravity system upstream of the Poplin Pump Station." [Per email from Crystal Panico, dated 12/7/2023, the equalization tank was substantially completed and should be online in the next couple of months.]
- "The Twelve Mile Creek WRF has a rated capacity of 7.5 MGD."

At Union County Water's direction, Black & Veatch analyzed two additional alternatives and issued a Sanctuary at Southgate Phase 2 Revised Wastewater Collection System Analysis, dated 8/24/2023 (See Appendix 6).

- Alternative 3 - On-Site Pump Station with Gravity Sewer Connection at Sedgewick Road. Alternative 3 includes an on-site pump station for the Sanctuary at Southgate Phase II development with force main discharging to the northwest, across Poplin Road, into the gravity sewer along Sedgewick Road, and the gravity sewer conveying wastewater flow approximately 2,000 feet to the Poplin Road Pump Station.
- Alternative 4 - On-Site Pump Station with Gravity Sewer Connection at Potomac Road. Alternative 4 includes an on-site pump station for the Sanctuary at Southgate Phase II development with force main discharging to the northwest, across Poplin Road, into the gravity sewer along Potomac Road, and the gravity sewer conveying flow approximately 2,000 feet to the Poplin Road pump station.

The findings and recommendations outlined in Black & Veatch's report, dated 8/24/2023, include:

- Both Alternative 3 and Alternative 4 "are not predicted to surcharge under a 1-year storm event." Either sewer discharge location "is viable from a capacity standpoint."
- "The allocation and firm capacities of the Poplin Road Pump Station are exceeded with the addition of [the Sanctuary at Southgate Phase II development] proposed peak flows."
- "Approval for [the Sanctuary at Southgate Phase II development] is dependent on completion of the CIP improvement project that will provide flow equalization at the Poplin Road Pump Station. At that point, the storage volume will be sufficient to prevent backup in the gravity system upstream of the Poplin Road Pump Station...Until the Poplin Road Pump Station [Equalization] Basin project is completed, it is not recommended that the 3.64 MGD operational capacity of the station be exceeded." [Per email from Crystal Panico, dated 12/7/2023, the equalization tank was substantially completed and should be online in the next couple of months.]
- "The Twelve Mile Creek WRF has a rated capacity of 7.5 MGD."

Based on the analyses completed by Black & Veatch, topography, and direction provided by UCW [Per email from Crystal Panico, dated 9/29/2023), BGE defined two alternatives for the Pump Station Alternatives Analysis. Alternative 1 includes an on-site pump station with gravity sewer force main connecting to existing infrastructure at Potomac Road (Annandale Subdivision) and Alternative 2 includes gravity sewer line connecting to the Porter Ridge Pump Station with upgrades to the existing Porter Ridge Pump Station and the Fieldstone Pump Station (See Appendix 7). For Alternative 2, Black & Veatch outlined the required upgrades for the existing Porter Ridge Pump Station and the Fieldstone Pump Station in the Sanctuary at Southgate Gravity Alternative Calculations, dated 11/21/2023 (See Appendix 8). Black & Veatch recommended the following for Alternative 2:

- Minimum 8-inch pipe diameter for the 7,100 linear feet of gravity sewer.
- Replace the two (2) pumps at the Porter Ridge Pump Station pumps with 275 GPM pumps at 105 feet of head.
- Replace the two (2) pumps at the Fieldstone Pump Station with news pumps at design point of 490 GPM at approximately 102 feet of head.
- “The pump sizing at each station is increasing by [30% to 50%]. Wet well improvements may be required depending on size of [the] new pumps and [the] existing wet well.” Wet wells should be assessed to ensure the pumps fit in the pump slots and the wet well provides adequate volume to limit the number of on/off cycles. “The sizing of the existing electrical systems and generator should also be assessed to determine whether they can support the larger pumps.”

ALTERNATIVE 1 – ON-SITE PUMP STATION WITH GRAVITY SEWER CONNECTION AT ANNANDALE SUBDIVISION

Overview

Alternative 1 includes a new on-site pump station for the proposed Southgate Mixed Use development and 5,460 linear feet of 6” PVC sanitary sewer force main connecting to existing sanitary sewer infrastructure at Potomac Road (See Appendix 7).

Assumptions

- BGE calculated a total sewer demand of 97,870 GPD (**design daily flow = 67.97 GPM**) and utilized a 2.5 peaking factor per *NCDENR Minimum Design Criteria for the Permitting of Pump Stations and Force Mains*, except for the single family detached lots. BGE applied a peaking factor of 3 to the single family detached lots design daily flow per Black & Veatch’s assumptions outlined in its Sanctuary at Southgate Phase 2 Wastewater Collection System Analyses (See Appendices 5 & 6). This resulted in a peak wet weather wastewater flow of 255,175 GPD (**peak hourly flow = 177.20 GPM**) (See Appendix 4).
- New Southgate Mixed Use pump station calculations are included as Appendix 9.
- BGE coordinated pump recommendations with Xylem Water Solutions USA, Inc. (Xylem). For the pump station condition of pump rate = 225 GPM, static head = 43 feet, and total head = 64 feet, Xylem recommended the Flygt NP 3127 HT 3~ Adaptive 488 pump (See Appendix 10).
- BGE coordinated pump station budget costs with CMH Solutions, LLC (CMH). CMH provided a lump sum budget cost of **\$963,000** for the new on-site Southgate Mixed Use pump station. Scope included:
 - 6-foot diameter, 21-foot deep wet well,
 - 4-inch discharge piping and 4-inch valve vault piping (force main will increase to 6-inch after the valve vault),
 - One (1) 8-inch gravity sewer into the wet well, and
 - 30-foot driveway.

Life Cycle Cost Analysis

BGE completed a life cycle cost analysis per the *Union County Water Documentation Requirements for the Consideration of Wastewater Pump Stations*. BGE determined the Net-Present-Value of Alternative 1 lifecycle costs is **\$2,086,600.86** (See Appendix 11).

ALTERNATIVE 2 – OFF-SITE GRAVITY SEWER CONNECTION TO PORTER RIDGE PUMP STATION

Overview

Alternative 2 includes construction of 7,100 linear feet of 8" PVC gravity sewer line with upgrades to the existing Porter Ridge Pump Station and the Fieldstone Pump Station.

Assumptions

- For the Porter Ridge Pump Station, BGE estimated a total sewer demand of 151,570 GPD (**design daily flow = 105.26 GPM**) and utilized a 2.5 peaking factor per *NCDENR Minimum Design Criteria for the Permitting of Pump Stations and Force Mains*, except for the single family detached lots. BGE applied a peaking factor of 3 to the single family detached lots design daily flow per Black & Veatch's assumptions outlined in its Sanctuary at Southgate Phase 2 Wastewater Collection System Analyses (See Appendices 5 & 6). This resulted in a peak wet weather wastewater flow of 389,425 GPD (**peak hourly flow = 270.43 GPM**). Porter Ridge Pump Station calculations are included as Appendix 12.
- For the Fieldstone Pump Station, BGE estimated a total sewer demand of 310,050 GPD (**design daily flow = 215.31 GPM**) and utilized a 2.5 peaking factor per *NCDENR Minimum Design Criteria for the Permitting of Pump Stations and Force Mains*, except for the single family detached lots. BGE applied a peaking factor of 3 to the single family detached lots design daily flow per Black & Veatch's assumptions outlined in its Sanctuary at Southgate Phase 2 Wastewater Collection System Analyses (See Appendices 5 & 6). This resulted in a peak wet weather wastewater flow of 785,625 GPD (**peak hourly flow = 545.57 GPM**). Fieldstone Pump Station calculations are included as Appendix 13.
- BGE coordinated pump recommendations with Xylem for the Porter Ridge Pump Station. For the pump station condition of pump rate = 300 GPM, static head = 43 feet, and total head = 94 feet, Xylem recommended the Flygt NP 3153 HT 3~ 462 pump (See Appendix 14).
- BGE coordinated Porter Ridge Pump Station upgrade budget costs with CMH Solutions, LLC (CMH). CMH provided a lump sum budget cost of **\$430,000** for the Porter Ridge Pump Station upgrades. Scope included:
 - Replace existing pumps with two (2) new Flygt NP 3153 HT 3~ 462 pumps,
 - Modifications to the existing pump control panel to include new 30Hp solid state reduced voltage starters, pump breakers, transformer breaker, power wiring, and ancillary controls as required,
 - Replace existing generator with a 60kW unit with 80kW alternator and 200A transfer switch, and
 - Upgrade existing electrical service to a 200A service.
 - The budget cost includes by-pass operations for the duration of the system upgrade.
 - The budget cost does not include modifications to the existing Radio Telemetry System.
- BGE coordinated pump recommendations with Xylem for the Fieldstone Pump Station. For the pump station condition of pump rate = 600 GPM, static head = 62 feet, and total head = 167 feet, Xylem recommended the Flygt NP 3202.185 HT pump (See Appendix 15).
- BGE coordinated Fieldstone Pump Station upgrade budget costs with CMH Solutions, LLC (CMH). CMH provided a lump sum budget cost of **\$642,000** for the Fieldstone Pump Station upgrades. Scope included:
 - Replace existing pumps with two (2) new Flygt NP 3202.185 HT pumps,
 - Modifications to the existing pump control panel to include new 75Hp solid state reduced voltage starters, pump breakers, transformer breaker, power wiring, and ancillary controls as required,

- Replace existing generator with a 175kW unit with 200kW alternator and 400A transfer switch, and
- Upgrade existing electrical service to a 400A service.
- The budget cost includes by-pass operations for the duration of the system upgrade.
- The budget cost does not include modifications to the existing Radio Telemetry System.
- BGE assumed construction of a 7,100 linear foot 8" PVC gravity sanitary sewer line with manholes located every 425 feet (plus 20%, one at beginning, and one at end).
- BGE assumed 10 acres of clearing and grubbing would be required to construct the new gravity sanitary sewer line.
- BGE assumed 10 acres of temporary construction easement and five (5) acres of sanitary sewer easement would be acquired for the new gravity sanitary sewer line.

Life Cycle Cost Analysis

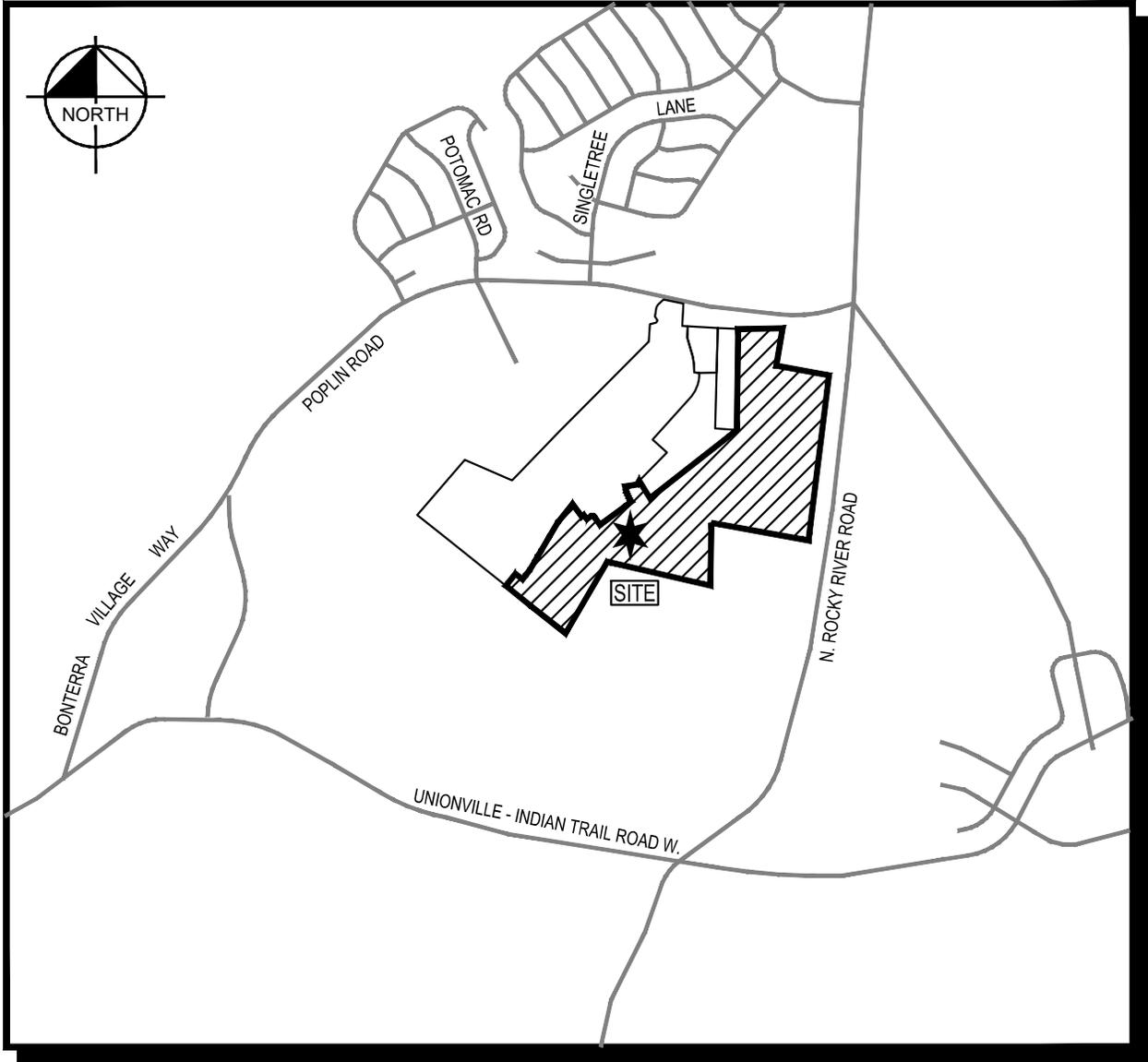
BGE completed a life cycle cost analysis per the *Union County Water Documentation Requirements for the Consideration of Wastewater Pump Stations*. BGE determined the Net-Present-Value of Alternative 2 lifecycle costs is **\$3,585,319.06** (See Appendix 16).

CONCLUSION

The life cycle cost analysis determined Alternative 1 is more cost effective than Alternative 2.

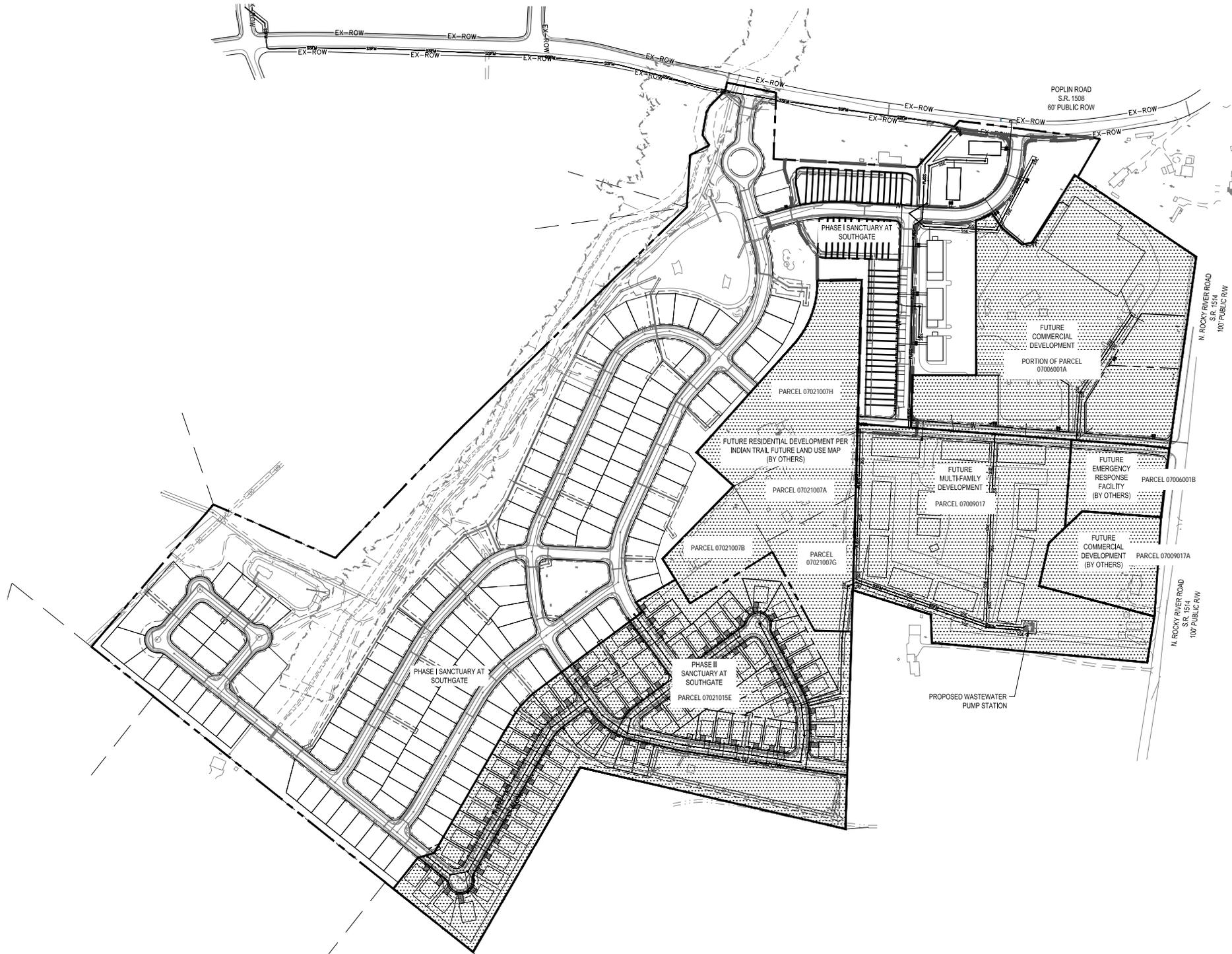
Total Life Cycle Cost Alternative Summary Table - NPV	
Alternative 1 - On-Site Pump Station with Gravity Sewer Connection at Annandale Subdivision	\$2,086,600.86
Alternative 2 - Off-Site Gravity Sewer Connection to Porter Ridge Pump Station	\$3,585,319.06
New Gravity Sanitary Sewer Line	\$1,669,354.47
Porter Ridge Pump Station Upgrades	\$753,607.36
Fieldstone Pump Station Upgrades	\$1,162,357.23
DELTA	\$1,498,718.20

APPENDIX 1 - SITE LOCATION MAP

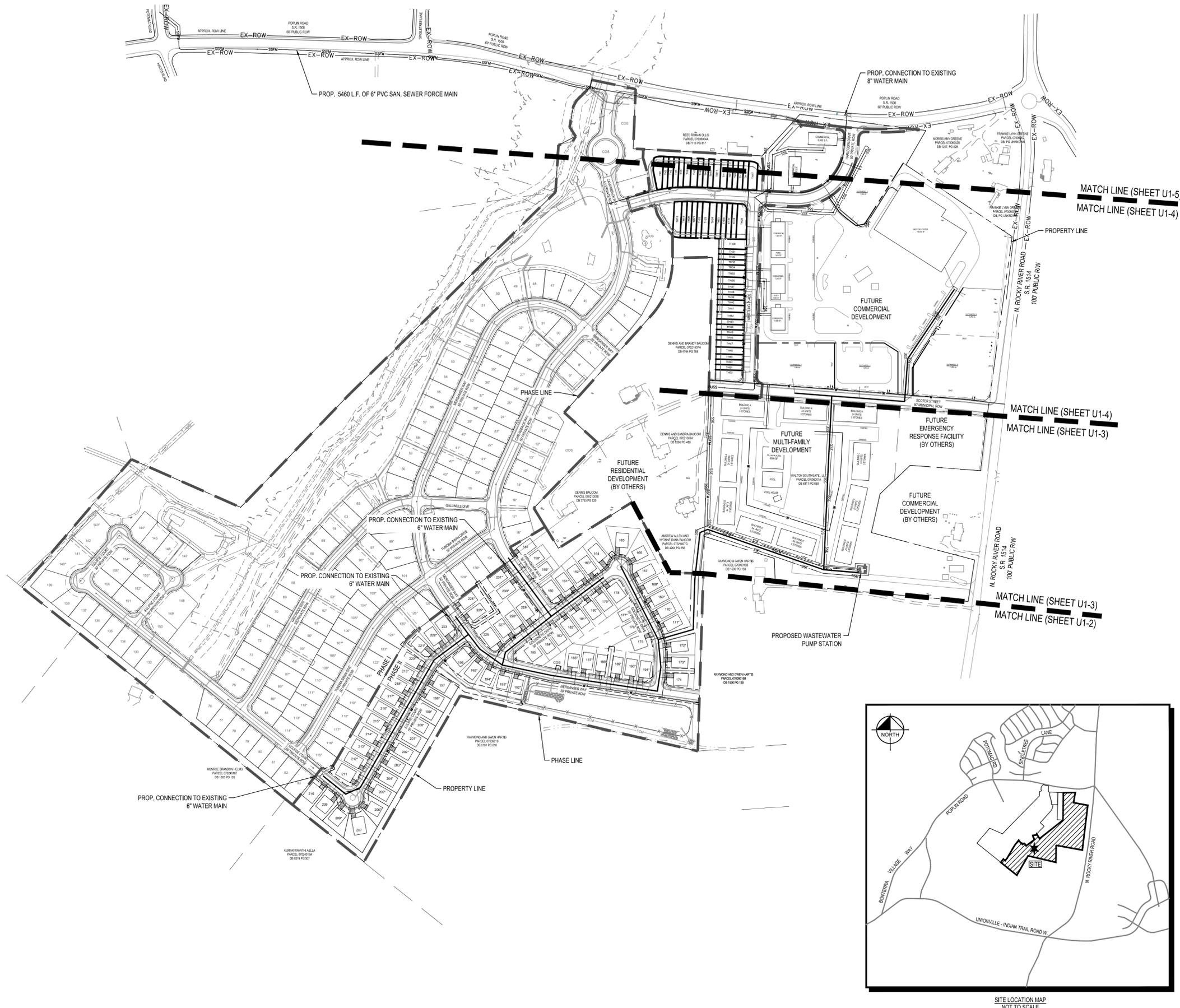


SITE LOCATION MAP
NOT TO SCALE

APPENDIX 2 - PROPOSED PUMP STATION SERVICE AREA MAP



G:\NCA\Projects\DR Horton\7734-16 - Sanctuary at Southgate\03 - DWG\Concept\CONCEPTUAL UTIL PLAN.dwg Layout: U1-0



SITE DEVELOPMENT DATA

JURISDICTION: TOWN OF INDIAN TRAIL, NC
 TOTAL PROJECT AREA: 90.355 ACRES

DEVELOPER: D.R. HORTON
 8025 ARROWRIDGE BLVD
 CHARLOTTE, NC 28273
 TAKARSKI@DRHORTON.COM
 704-574-4579
 CONTACT: TROY KARSKI

TAX PARCEL #: 07006001A
 ADDRESS: 4823 N ROCKY RIVER ROAD
 INDIAN TRAIL, NC 28079

CURRENT OWNER: WALTON SOUTHGATE, LLC
 MAILING ADDRESS: 8800 N GAINES CENTER DRIVE, STE 345
 SCOTTSDALE, AZ 85258
 CONTACT: BRAD MARTIN
 BMARTIN@WALTON.COM

TAX PARCEL #: 07009017
 ADDRESS: 4709 N ROCKY RIVER ROAD
 INDIAN TRAIL, NC 28079

CURRENT OWNER: WALTON SOUTHGATE, LLC
 MAILING ADDRESS: 8800 N GAINES CENTER DRIVE, STE 345
 SCOTTSDALE, AZ 85258
 CONTACT: BRAD MARTIN
 BMARTIN@WALTON.COM

TAX PARCEL #: 07021015E
 ADDRESS: 0 POPLIN ROAD
 INDIAN TRAIL, NC 28079

CURRENT OWNER: WALTON NORTH CAROLINA, LLC ET AL
 MAILING ADDRESS: 8800 N GAINES CENTER DRIVE, STE 345
 SCOTTSDALE, AZ 85258
 CONTACT: BRAD MARTIN
 BMARTIN@WALTON.COM

SUBMITTING ENGINEER /
 LANDSCAPE ARCHITECT: MATT SINKOVITZ, P.E.
 BGE, INC.
 1111 METROPOLITAN AVE, STE 250
 CHARLOTTE, NC 28204
 MSINKOVITZ@BGEINC.COM
 960.666.0326

PHASE II SANCTUARY AT SOUTHGATE:
 PARCEL(S): 07021015E
 SINGLE FAMILY RESIDENTIAL UNITS: 75

FUTURE MULTIFAMILY DEVELOPMENT:
 PARCEL(S): 07009017
 UNITS: 240
 CLUBHOUSE: 6,500 SF
 POOL: 2,500 SF

FUTURE COMMERCIAL DEVELOPMENT:
 PARCEL(S): 07006001A, 07006001B, 07009017A
 GROCERY CENTER: 75,000 SF
 RETAIL SHOPS: 20,000 SF
 COFFEE SHOP WITH DRIVE THROUGH: 10,000 SF
 FAST FOOD RESTAURANT WITH DRIVE THROUGH: 6,000 SF
 MEDICAL OFFICES: 12,000 SF
 FUEL CENTER: 9,500 SF
 BRANCH BANK WITH DRIVE THROUGH: 6,000 SF
 CAR WASH: 5,000 SF
 RESTAURANT (BY OTHERS): 6,000 SF
 EMERGENCY RESPONSE CENTER (BY OTHERS): 14,000 SF

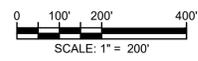
NUMBER AND SIZE OF DOMESTIC AND IRRIGATION WATER METERS:
 SINGLE FAMILY RESIDENTIAL UNITS: 75 METERS
 3/4" DOMESTIC AND IRRIGATION
 FUTURE MULTIFAMILY DEVELOPMENT: 3/4" FIRE DETECTOR, 2" DOMESTIC

NUMBER AND SIZE OF COMMERCIAL WATER METERS:
 FUTURE COMMERCIAL DEVELOPMENT: 20 METERS
 GROCERY CENTER: 3/4" FIRE DETECTOR, 1" DOMESTIC
 MIXED USE RETAIL SHOPS: 3/4" FIRE DETECTOR, 3/4" DOMESTIC
 COFFEE SHOP: 3/4" FIRE DETECTOR, 3/4" DOMESTIC
 FAST FOOD RESTAURANT: 3/4" FIRE DETECTOR, 3/4" DOMESTIC
 MEDICAL OFFICES: 3/4" FIRE DETECTOR, 3/4" DOMESTIC
 FUEL CENTER: 3/4" FIRE DETECTOR, 3/4" DOMESTIC
 BRANCH BANK: 3/4" FIRE DETECTOR, 3/4" DOMESTIC
 CAR WASH: 3/4" FIRE DETECTOR, 3/4" DOMESTIC
 RESTAURANT (BY OTHERS): 3/4" FIRE DETECTOR, 1" DOMESTIC
 FUTURE EMERGENCY RESPONSE FACILITY (BY OTHERS): 3/4" FIRE DETECTOR, 3/4" DOMESTIC

UNION COUNTY PUBLIC WORKS UTILITY NOTES:
 1. WATER MAIN TO BE LOCATED IN R.O.W. OR WITHIN A 15-FOOT EXCLUSIVE WATER EASEMENT.
 2. SEWER MAIN IS TO BE LOCATED IN R.O.W. OR WITHIN A 20-FOOT EXCLUSIVE SEWER EASEMENT.
 3. WATER AND SEWER SERVICE SHALL NOT CROSS PROPERTY BOUNDARY.

RECEIVING WATER TREATMENT FACILITY: TWELVE MILE CREEK WASTEWATER TREATMENT PLANT

QUALITY OF WASTEWATER SERVICE: DOMESTIC AND COMMERCIAL
 PHASE II AND FUTURE RESIDENTIAL, MULTIFAMILY, AND COMMERCIAL DEVELOPMENTS REQUIRE
 CONSTRUCTION OF NEW WASTEWATER PUMP STATION. THE PROPOSED WASTEWATER PUMP
 STATION WILL SERVICE A +/- 74 ACRE AREA.
 SEE SHEET U1-1 FOR CALCULATIONS AND THE PROPOSED PUMP STATION SERVICE AREA.



NOTE:
ANY WELLS AND/OR ON-SITE WATERWATER DISPOSAL SYSTEMS DISCOVERED
DURING THE SITE DEVELOPMENT PROCESS WILL BE ABANDONED IN ACCORDANCE
WITH APPLICABLE NORTH CAROLINA LAWS AND RULES.



FILE NUMBER:
7734-16
DATE: 05/30/2025

U1-0

REV	DATE	DESCRIPTION
1		
2		
3		
4		
5		

DESIGNED BY: APS
 DRAWN BY: APS
 REVIEWED BY: MJS

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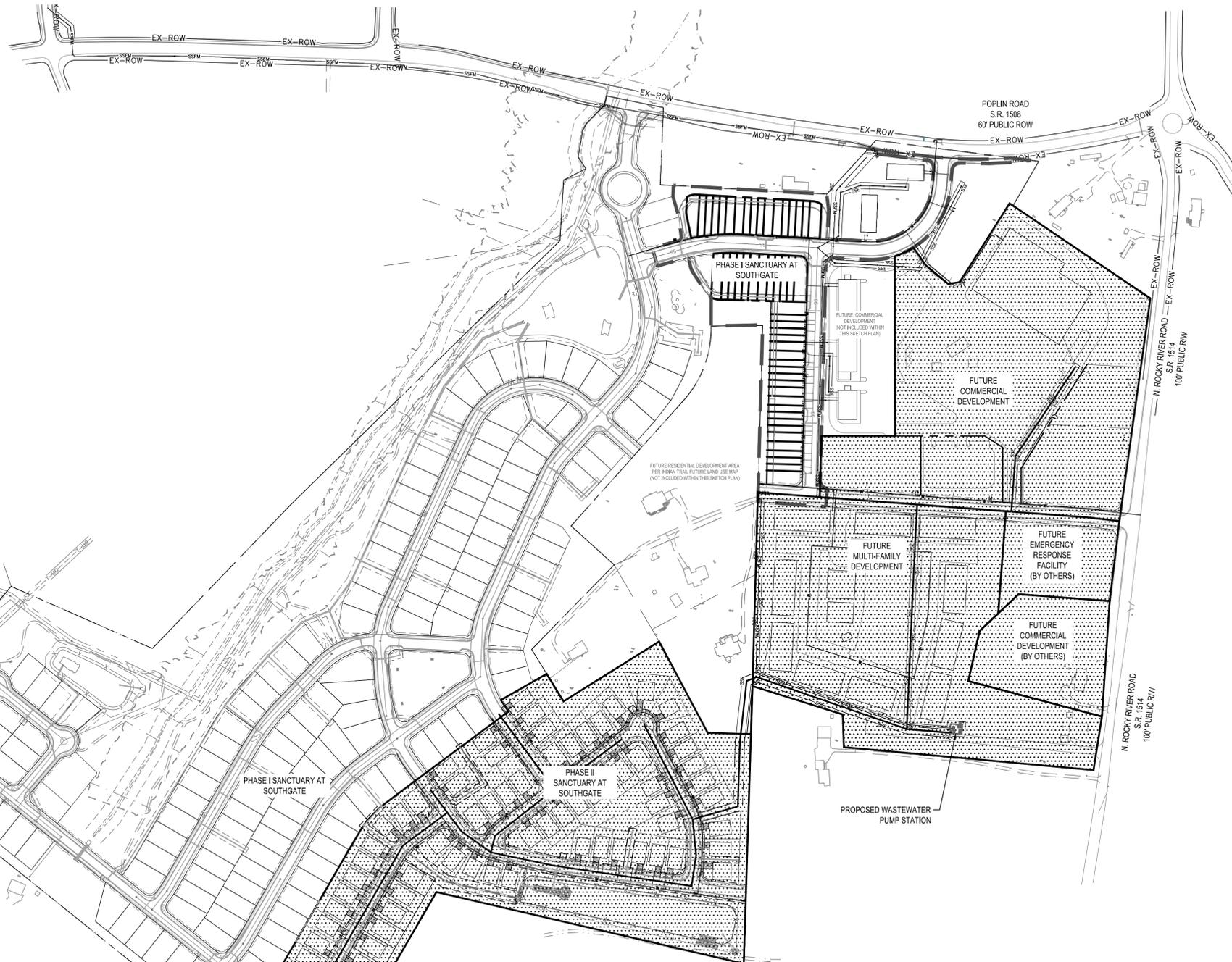
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SOUTHGATE MIXED USE
 INDIAN TRAIL, NC 28073

OVERALL UTILITY SKETCH PLAN

811
 Know what's below.
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PUMP STATION SERVICE AREA (+/- 61.2 ACRES)

PARCELS: 07006001A
07006001B
07009017
07009017A
07021007A
07021007J
07021015E

CALCULATIONS:

IRRIGATION WATER USAGE:

SINGLE FAMILY RESIDENTIAL UNITS
75 RESIDENTIAL UNITS X 200 GPD/LOT = 15,000 GPD

OPEN SPACE - MULTI-FAMILY / AMENITY AREA
6,250 CU. FT X 7.48052 GAL/CU. FT = 46,754 GAL/WK = 6,679 GPD
ASSUMES 1/2" WATERING WEEKLY ON APPROX. 150,000 SF OF LANDSCAPED AREAS.
1/2" = 0.041667 FT

TOTAL IRRIGATION WATER DEMAND = 21,679 GPD

DOMESTIC WATER USAGE:

SINGLE FAMILY RESIDENTIAL UNITS
75 RESIDENTIAL UNITS X 400 GPD = 30,000 GPD

FUTURE MULTI-FAMILY DEVELOPMENT
UNITS (240 UNITS, ASSUME 3 BEDROOMS PER UNIT):
720 BEDROOMS X 125 GPD/BEDROOM = 90,000 GPD
CLUBHOUSE: 10 FIXTURES X 250 GPD/FIXTURE = 2,500 GPD
POOL: 2,500 SF / 15 POOL SURFACE AREA SF/SWIMMER = 167 SWIMMERS
10 GPD/SWIMMER X 167 SWIMMERS = 1,670 GPD

REQUESTED DOMESTIC WATER DEMAND = 124,170 GPD
PEAK DOMESTIC WATER DEMAND = 215.6 GPM

DOMESTIC WASTEWATER DEMAND FLOW:

SINGLE FAMILY RESIDENTIAL UNITS
75 RESIDENTIAL UNITS X 280 GPD = 21,000 GPD

FUTURE MULTI-FAMILY DEVELOPMENT
UNITS (240 UNITS, ASSUME 3 BEDROOMS PER UNIT):
720 BEDROOMS X 70 GPD/BEDROOM = 50,400 GPD
CLUBHOUSE: 10 FIXTURES X 250 GPD/FIXTURE = 2,500 GPD
POOL: 2,500 SF / 15 POOL SURFACE AREA SF/SWIMMER = 167 SWIMMERS
10 GPD/SWIMMER X 167 SWIMMERS = 1,670 GPD

TOTAL DOMESTIC WASTEWATER DEMAND = 75,570 GPD

COMMERCIAL WATER USAGE AND WASTEWATER DEMAND FLOW:
(PEAK FLOWS CALCULATED USING 2.5 PEAKING FACTOR)

FUTURE EMERGENCY RESPONSE BUILDING (BY OTHERS)
10 FIXTURES X 250 GPD/FIXTURE = 2,500 GPD
PEAK = 4.34 GPM

FUTURE COMMERCIAL DEVELOPMENT
GROCERY CENTER (75,000 SF)
DELI = 1,000 SF X 40 GPD/100 SF = 400 GPD
MEAT/FISH DEPARTMENT = 2,000 SF X 75 GPD/100 SF = 1,500 GPD
16 FIXTURES X 250 GPD/FIXTURE = 4,000 GPD
TOTAL = 5,900 GPD
PEAK = 10.24 GPM

COFFEE SHOP WITH DRIVE THROUGH (10,000 SF)
10,000 SF X 50 GPD/100 SF = 5,000 GPD
PEAK = 8.68 GPM

FUEL CENTER (9,500 SF)
2 FIXTURES X 250 GPD/FIXTURE = 500 GPD
PEAK = 0.87 GPM

CAR WASH (5,000 SF)
1,200 GPD/BAY X 2 BAYS = 2,400 GPD
PEAK = 4.17 GPM

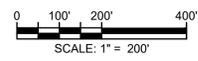
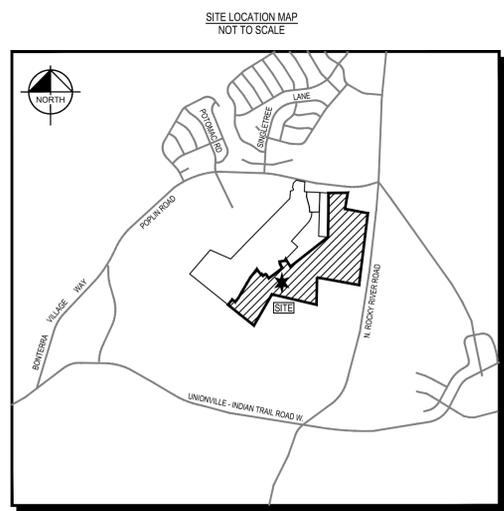
RESTAURANT (150 SEATS) (BY OTHERS)
40 GAL/SEAT X 200 SEATS = 6,000 GPD
PEAK = 10.42 GPM

TOTAL COMMERCIAL WASTEWATER DEMAND = 22,300 GPD
TOTAL COMMERCIAL WATER DEMAND = 22,300 GPD
PEAK COMMERCIAL WATER DEMAND = 38.7 GPM

CALCULATIONS SUMMARY

WATER DEMAND SUMMARY (PS SERVICE AREA)		
DEMAND TYPE	FLOW	UNIT
IRRIGATION	21,679 GPD	
DOMESTIC	124,170 GPD	
COMMERCIAL	22,300 GPD	
TOTAL	168,149 GPD	
PEAK DOMESTIC	216 GPM	
PEAK COMMERCIAL	38.7 GPM	
TOTAL	254 GPM	

WASTEWATER DEMAND SUMMARY (PS SERVICE AREA)		
DEMAND TYPE	FLOW	UNIT
DOMESTIC	75,570 GPD	
COMMERCIAL	22,300 GPD	
TOTAL	97,870 GPD	



FILE NUMBER:
7734-16
DATE: 05/30/2025

U1-1

DESIGNED BY: APS
DATE

DRAWN BY: APS
REV

REVIEWED BY: MJS
DESCRIPTION

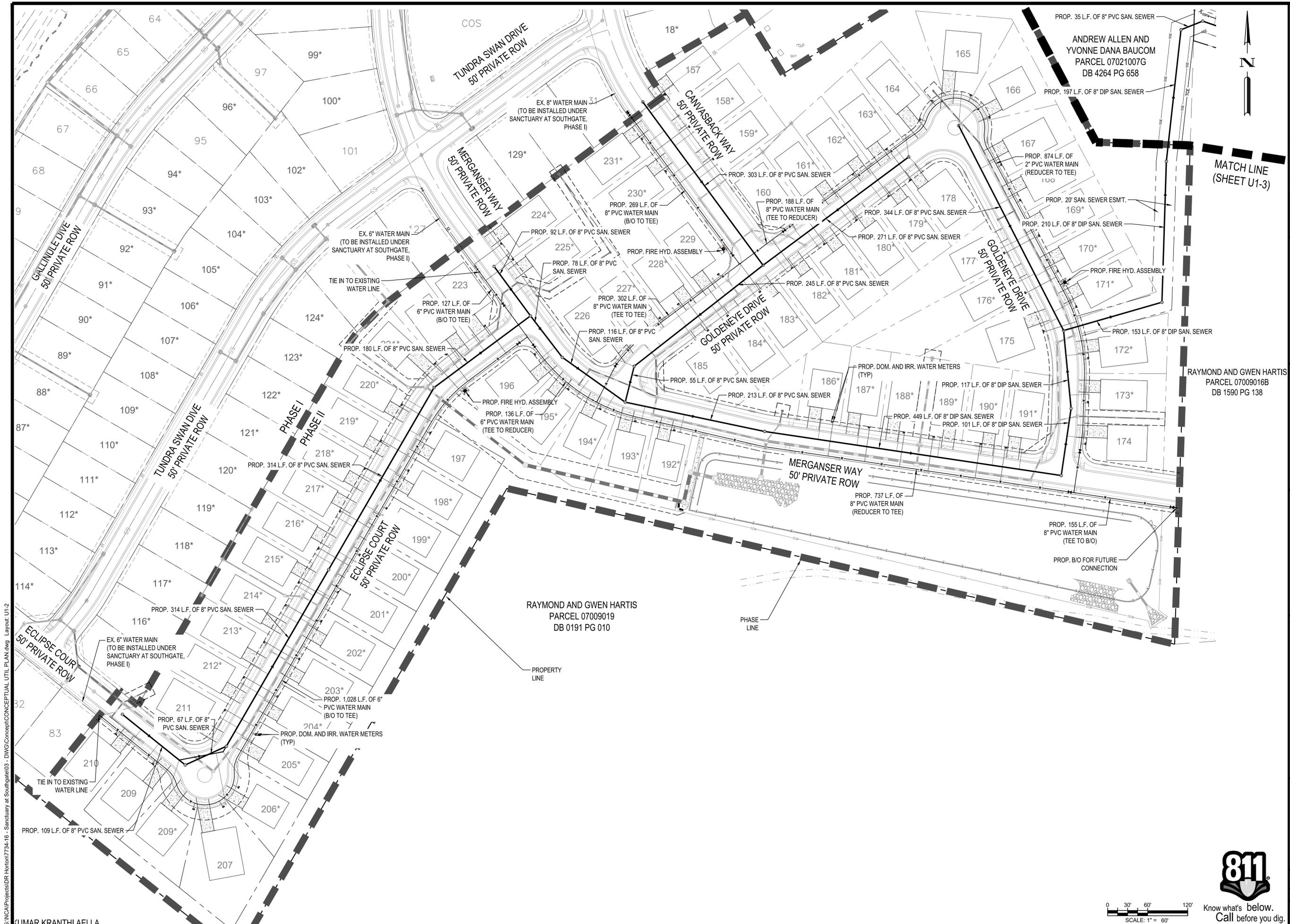
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SCOTTSDALE / AZ 85238

SOUTHGATE MIXED USE

INDIAN TRAIL, NC 28613

PROPOSED PUMP STATION SERVICE AREA MAP



ANDREW ALLEN AND
YVONNE DANA BAUCOM
PARCEL 07021007G
DB 4264 PG 658

MATCH LINE
(SHEET U1-3)

RAYMOND AND GWEN HARTIS
PARCEL 07009016B
DB 1590 PG 138

RAYMOND AND GWEN HARTIS
PARCEL 07009019
DB 0191 PG 010

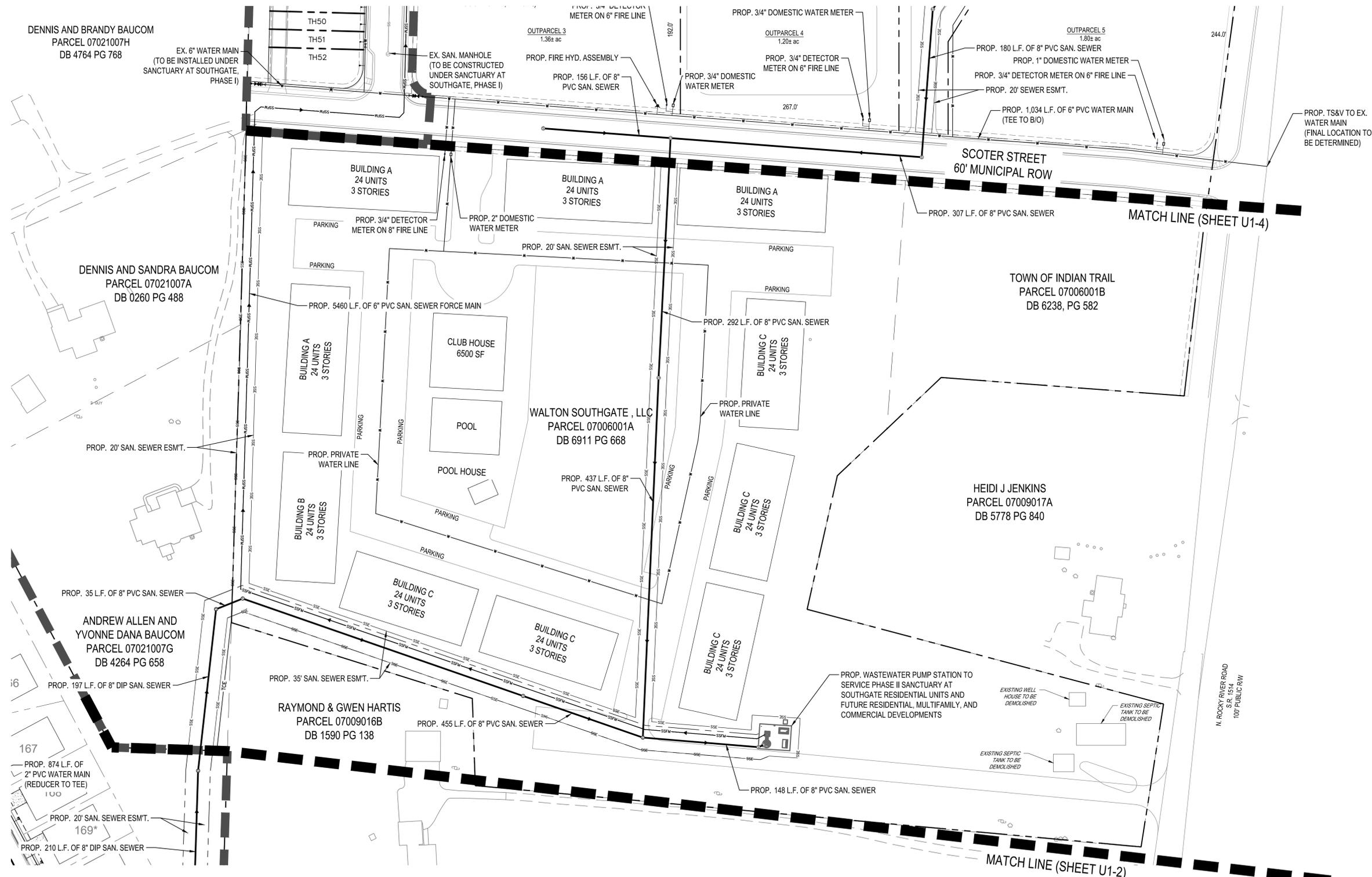


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1		DESIGNED BY: APS
2		DRAWN BY: APS
3		REVIEWED BY: MJS

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UTILITY SKETCH PLAN (1 OF 4)	
FILE NUMBER:	7734-16
DATE:	05/30/2025
U1-2	

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IMAR KRANTHI AFIIA



DENNIS AND BRANDY BAUCOM
PARCEL 07021007H
DB 4764 PG 768

DENNIS AND SANDRA BAUCOM
PARCEL 07021007A
DB 0260 PG 488

ANDREW ALLEN AND
YVONNE DANA BAUCOM
PARCEL 07021007G
DB 4264 PG 658

RAYMOND & GWEN HARTIS
PARCEL 07009016B
DB 1590 PG 138

WALTON SOUTHGATE, LLC
PARCEL 07006001A
DB 6911 PG 668

TOWN OF INDIAN TRAIL
PARCEL 07006001B
DB 6238, PG 582

HEIDI J JENKINS
PARCEL 07009017A
DB 5778 PG 840

SCOTER STREET
60' MUNICIPAL ROW

N. ROCKY RIVER ROAD
S.R. 1514
100' PUBLIC ROW



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1		
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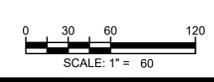
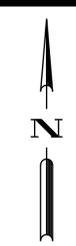
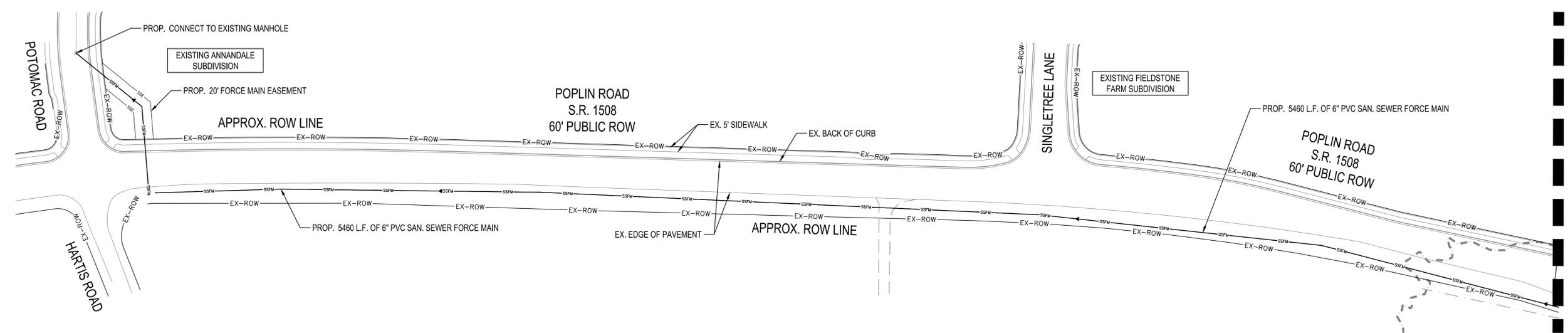
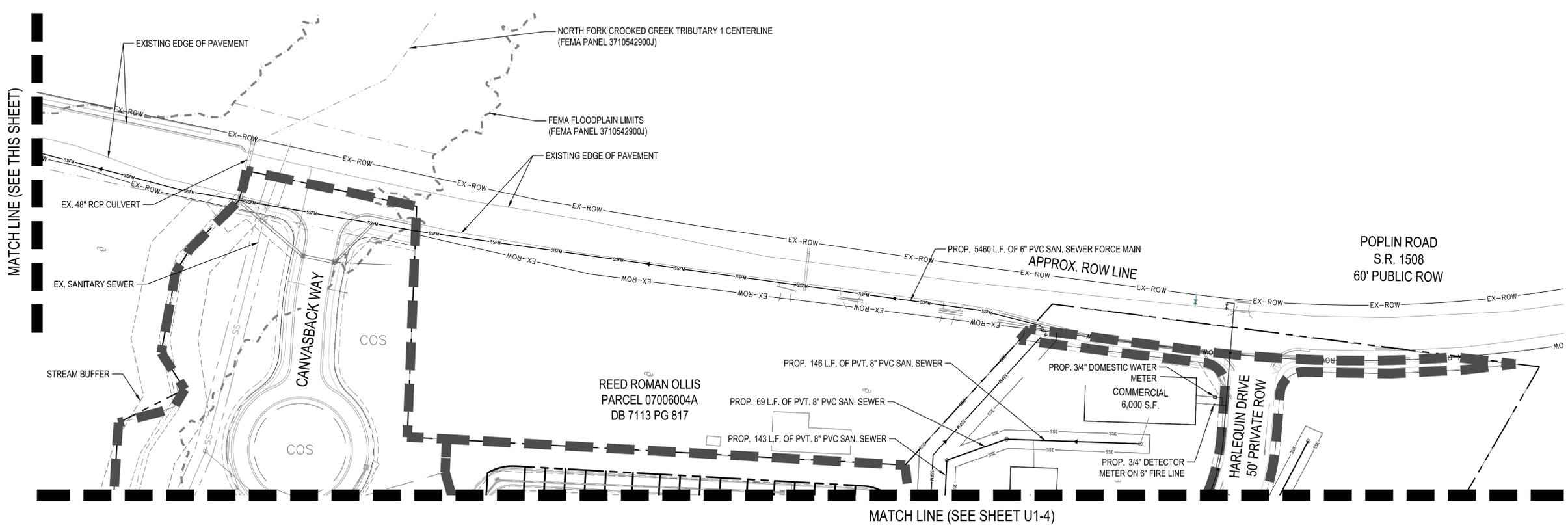
UTILITY SKETCH PLAN
 (2 OF 4)

FILE NUMBER:
7734-16
 DATE: 05/30/2025

U1-3

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REVIEWED BY:	MJS			
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Walton				
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SOUTHGATE MIXED USE				
INDIAN TRAIL, NC 28613				
UTILITY SKETCH PLAN (4 OF 4)				
FILE NUMBER:	7734-16			
DATE:	05/30/2025			
	U1-5			

APPENDIX 4 - BGE PROPOSED PUMP STATION PEAK WET WEATHER SEWER FLOW

ESTIMATED DOMESTIC SEWER DEMAND			
SANCTUARY AT SOUTHGATE PHASE II SINGLE FAMILY DETACHED LOTS			
TOTAL (LOTS)	GPD/LOT	AVE DAILY FLOW (GPD)	PEAK WET WEATHER FLOW (GPD)
75	280	21000	63000
FUTURE MULTI-FAMILY UNITS (240) (BY OTHERS)			
TOTAL (BEDROOMS)	GPD/ BEDROOM	AVE DAILY FLOW (GPD)	PEAK WET WEATHER FLOW (GPD)
720	70	50400	126000
FUTURE CLUBHOUSE (BY OTHERS)			
TOTAL (FIXTURES)	GPD/ FIXTURE	AVE DAILY FLOW (GPD)	PEAK WET WEATHER FLOW (GPD)
10	250	2500	6250
FUTURE POOL (BY OTHERS)			
TOTAL (SF)	SWIMMERS	AVE DAILY FLOW (GPD)	PEAK WET WEATHER FLOW (GPD)
2500	167	1670	4175
TOTAL DOMESTIC SEWER		75570	199425

NOTES:
 1) WASTEWATER DESIGN FLOW RATES USED FROM 15A NCAC 02T .0114.
 2A) 2500 SF / 15 POOL SURFACE AREA SF/SWIMMER = 167 SWIMMERS
 2B) 10 GALLONS/DAY/SWIMMER
 3) BGE UTILIZED MINIMUM PEAKING FACTOR OF 2.5 TO CALCULATE PEAK WASTEWATER FLOWS FOR ANY PUMP STATION. PER NCDENR MINIMUM DESIGN CRITERIA FOR THE PERMITTING OF PUMP STATIONS AND FORCE MAINS, IN ALL INSTANCES, EXCEPT FOR THE SINGLE FAMILY DETACHED LOTS. BGE UTILIZED A PEAKING FACTOR OF 3 TO CALCULATE PEAK WASTEWATER FLOWS FOR THE SINGLE FAMILY DETACHED LOTS.

ESTIMATED COMMERCIAL SEWER DEMAND			
EMERGENCY RESPONSE BUILDING (BY OTHERS)			
TOTAL (FIXTURES)	GPD/ FIXTURE	AVE DAILY FLOW (GPD)	PEAK WET WEATHER FLOW (GPD)
10	250	2500	6250
FUTURE GROCERY (75,000 SF) (BY OTHERS)			
SPACE	GPD	AVE DAILY FLOW (GPD)	PEAK WET WEATHER FLOW (GPD)
DELI	400	5900	14750
MEAT/FISH DEPARTMENT	1500		
FIXTURES	4000		
FUTURE COFFEE SHOP (10,000 SF) (BY OTHERS)			
GPD/100 SF	100 SF	AVE DAILY FLOW (GPD)	PEAK WET WEATHER FLOW (GPD)
50	100	5000	12500
FUTURE FUEL CENTER (9,500 SF) (BY OTHERS)			
TOTAL (FIXTURES)	GPD/ FIXTURE	AVE DAILY FLOW (GPD)	PEAK WET WEATHER FLOW (GPD)
2	250	500	1250
FUTURE CAR WASH (5,000 SF) (BY OTHERS)			
GAL/BAY	BAYS	AVE DAILY FLOW (GPD)	PEAK WET WEATHER FLOW (GPD)
1200	2	2400	6000
FUTURE RESTAURANT (150 SEATS) (BY OTHERS)			
GAL/SEAT	SEATS	TOTAL (GPD)	PEAK WET WEATHER FLOW (GPD)
40	150	6000	15000
TOTAL COMMERCIAL SEWER (GPD)		22300	55750

NOTES:
 1) DESIGN FLOW RATES FROM NCAC 02T .0114.
 2) ASSUMES 1,000 SF DELI, 2,000 SF MEAT/FISH DEPARTMENT, AND 16 BATHROOM FIXTURES FOR GROCERY.
 3) ASSUMES 200 SF PER EMPLOYEE FOR MIXED USE RETAIL SHOPS AND ONE SHIFT.
 4) ASSUMES 1 MEDICAL PRACTITIONER PER 1,000 SF OF MEDICAL OFFICE SPACE AND ONE SHIFT.
 5) BGE UTILIZED MINIMUM PEAKING FACTOR OF 2.5 TO CALCULATE PEAK WASTEWATER FLOWS FOR ANY PUMP STATION. PER NCDENR MINIMUM DESIGN CRITERIA FOR THE PERMITTING OF PUMP STATIONS AND FORCE MAINS, IN ALL INSTANCES, EXCEPT FOR THE SINGLE FAMILY DETACHED LOTS. BGE UTILIZED A PEAKING FACTOR OF 3 TO CALCULATE PEAK WASTEWATER FLOWS FOR THE SINGLE FAMILY DETACHED LOTS.

TOTAL SEWER DEMAND (GPD)	97870	255175
TOTAL PEAK WET WEATHER FLOW (GPM)	177.20	

26 April 2023

Union County Water
500 N. Main Street, Suite 500
Monroe, NC 28112

Wastewater Collection System Analysis
Sanctuary at Southgate Phase 2
Black & Veatch Project
175886.8058

Attention: Crystal Outlaw Panico, PE

BACKGROUND

Union County Water (UCW) has requested that Black & Veatch perform hydraulic analyses for the proposed Sanctuary at Southgate development utilizing UCW's collection system hydraulic model. The analyses are intended to evaluate the impacts of the new development on wastewater flows in the receiving collection system. The proposed Sanctuary at Southgate Phase 2 development would be tributary to the Poplin Road pump station, which pumps receiving flows into the Twelve Mile Creek Basin.

Additionally, UCW has requested that a capacity analysis be performed for the collection system from the development to the Poplin Road Pump Station, including gravity sewer and the Fieldstone PS. Several developments that are permitted to discharge to the same gravity sewer as Sanctuary at Southgate Phase 2 but do not yet have a sewer connection are incorporated into this analysis. This analysis is intended to evaluate the impacts of the new development on the wastewater flows in the receiving collection system

DEVELOPMENT OVERVIEW

Based on the Utility Sketch Plan document prepared by BGE, Inc, dated July 7, 2022 the site will consist of 75 single family homes, 240 three-bedroom multi-family units, one clubhouse and pool, 24,500 SF of commercial development, a 200 seat restaurant, and an emergency response building. The development is located south of the intersection of Poplin Road and North Rocky River Road. The site is ±72 acres and Figure 1 shows a plan view of the proposed development.

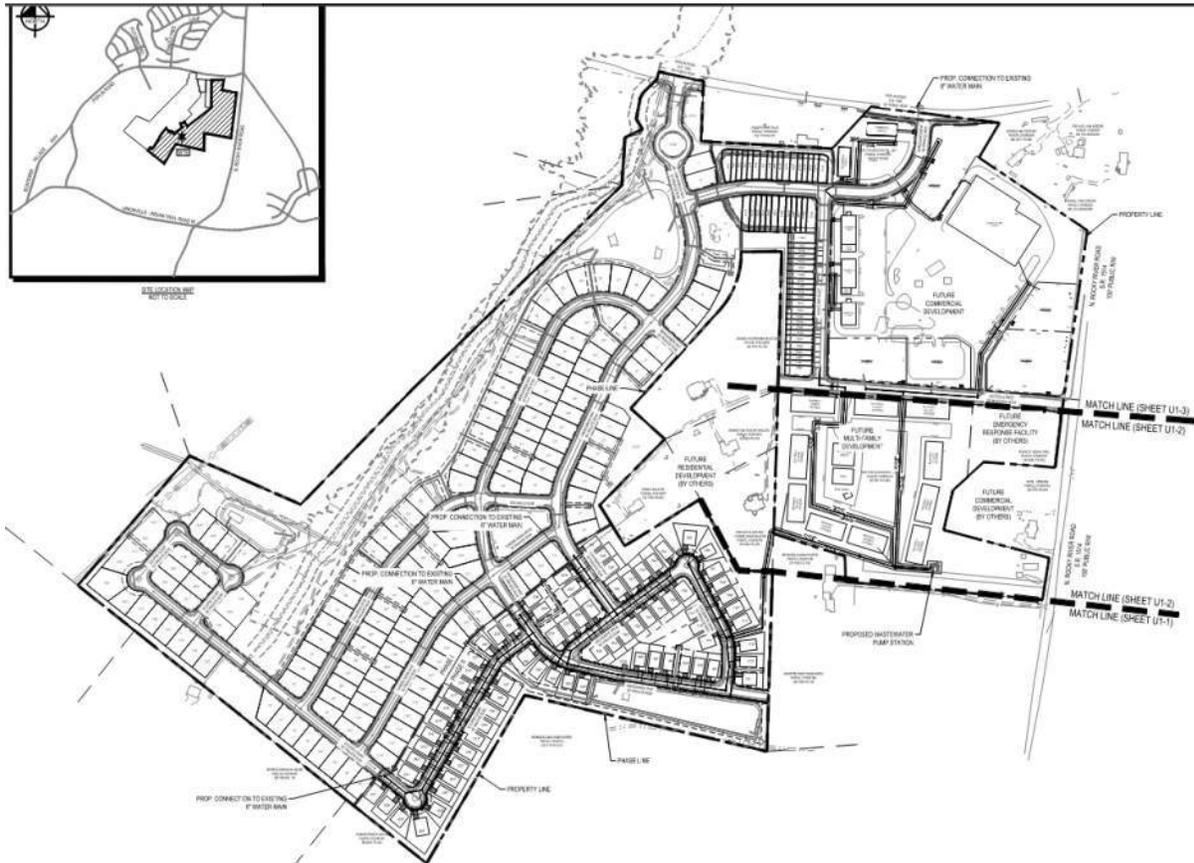


Figure 1 Development Overview

ESTIMATED DEVELOPMENT WASTEWATER FLOWS

The developer's sketch included an estimate of total average daily flow of 97,870 gpd for the development. Table 1 summarizes the development's wastewater flows. In addition to the average daily flow estimates provided by the developer, the peak wet weather flows were estimated using a peaking factor of 3 for single family homes and a peaking factor of 2.5 for multi-family homes and commercial. The peak flows incorporate an infiltration and inflow (I/I) flow component for the proposed development and is in line with the peaking factors observed in the UCW 2011 Comprehensive Master Plan I/I estimates for new developments.

Table 1 Sanctuary at Southgate Phase 2 Development Wastewater Flows Summary

Flow Source	Number of Units/Size	Unit	Unit Rates	Average Daily Flow (gpd)	Peak Wet Weather Flow (gpd)
Single Family Residential Units	75	Units	280	21,000	63,000
Multi-Family Units	720	Bedrooms	70	50,400	126,000
Pool	1	Unit	1,670	1,670	4,175
Clubhouse	10	Fixtures	250	2,500	6,250
Commercial / Retail	--	--	--	22,300*	55,750
Total				97,870	255,175
*Total commercial / retail calcs on project utility plans page U1-0 (total of 22,300 gpd) do not match page U1-1 calculations (total of 24,300 gpd).					

DEVELOPMENT ANALYSIS

Figure 2 is a map of the project location and contains a red-dashed line indicating the wastewater flow path for the development. The development contains an on-site pump station on the southeast portion of the site, according to site utility plans. The pump station would pump flows from Phase 2 of the development and discharge to the north into the Sanctuary at Southgate Phase 1 gravity sewers. After being discharged to the Phase 1 sewer, wastewater will flow downstream by gravity to an existing 12-inch sewer. The flow travels through 5,200 feet of 12-inch sewer, the Fieldstone Pump Station, and 4,500 feet of 6-inch force main and then discharges to 1,300 feet of 8-inch gravity sewer that flows to the Poplin Road Pump Station.

Additionally, a separate flow path was analyzed for the Sanctuary at Southgate Phase 2 development, indicated in Figure 2 with a blue-dashed line. This alternate flow path does not require an on-site pump station, but instead assumes the construction of approximately 4,700 LF of adequately sized sewer to convey project flows to the Porter Ridge service area. In this alternative, development flows would connect to a 3,100 LF 8-inch gravity sewer leading to the Porter Ridge pump station, which discharges into the 12-inch Fieldstone service area collection sewer, approximately 8,000 LF downstream of the connection point indicated on the development's site utility plan.

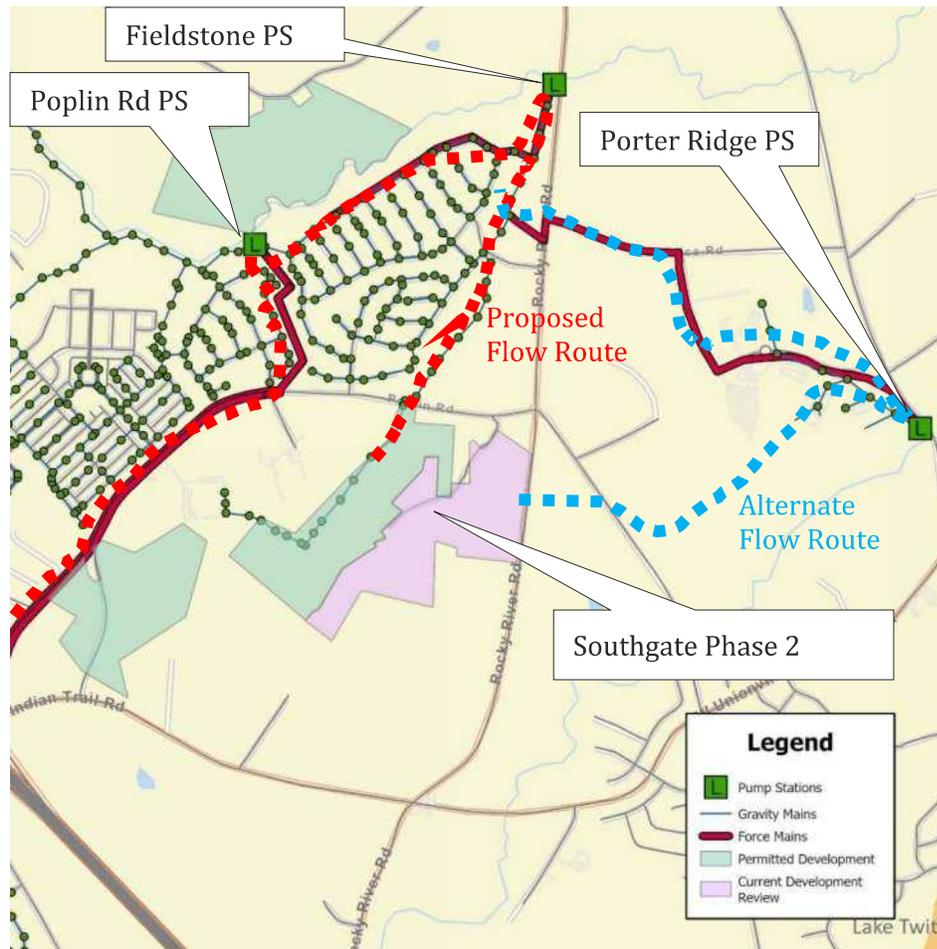


Figure 2 Development Location and Flow Paths

An initial model run was performed to simulate existing 2015 conditions within the Twelve Mile Creek model network under the 2011 Comprehensive Master Plan design storm event, a 1-year SCS Type III storm with a 24-hour duration. The 2015 model run was then adjusted to include the new Sanctuary at Southgate Phase 2 development. The impact to the collection system was compared to the predevelopment conditions including the receiving gravity sewer and the downstream system. Permitted development flows, totaling 122,180 gpd, were included in the model tributary to the Fieldstone PS. Estimated flows for the proposed new development, totaling 97,870 gpd were added on top of these permitted flows in the 2015 model flows.

DEVELOPMENT RESULTS

The Sanctuary at Southgate Phase 2 pump station would pump flows from the project site to the north into the Phase 1 gravity sewers. After being discharged to the Phase 1 sewer, wastewater will flow downstream by gravity to the existing 12-inch sewer. The 2015 model was updated to show the new development flows going to the indicated connection point. Model

flows were compared against the UCW criteria for improvements in the wastewater collection system. The criteria that would trigger an improvement in the UCW gravity sewers is 50% of the MH depth surcharged above the crown of the pipe during a 1-year design storm.

The model predicts there will be no surcharge in pipes downstream of the development, and the addition of the Sanctuary at Southgate Phase 2 development flow does not increase the peak flows significantly. The peak flow to the Fieldstone pump station is approximately 0.70 MGD, and the peak velocity in the force main is 5.38 ft/s. The peak flows from proposed and permitted developments exceed the station's firm capacity of 0.44 MGD. The peak flow to the Poplin Road pump station is 4.07 mgd; however, the firm pumping capacity of the Poplin Road pump station is limited to 3.64 mgd because of the allowable pressures in the force main. Therefore, the peak flows exceeded the flow capacity at the Poplin Road pump station.

There is available capacity for the Sanctuary at Southgate Phase 2 development to connect to the 12-inch sewer. No SSOs were predicted in the 12-inch or 8-inch downstream gravity systems. However, the current firm pumping capacity of the Fieldstone and Poplin Road pump stations are inadequate to handle the additional wet weather flows from the new development.

GRAVITY SEWERS

The graphs in Figure 3 and Figure 4 below show the flow and depth in the sewer downstream of the new connection where the 12-inch sewer receives flow from this project and other tributary permitted project flows tributary to the Fieldstone pump station. The total flow at MH-14726 includes the obligated flows, as well as flows from the Sanctuary at Southgate Phase 2 development flows. Depth was not observed in the model to exceed the crown of pipe at this point in the collection system. Flow at this point prior to the development flows being added to

the model was 0.379 mgd. This increased to 0.624 mgd after Sanctuary at Southgate Phase 2 flows were added.

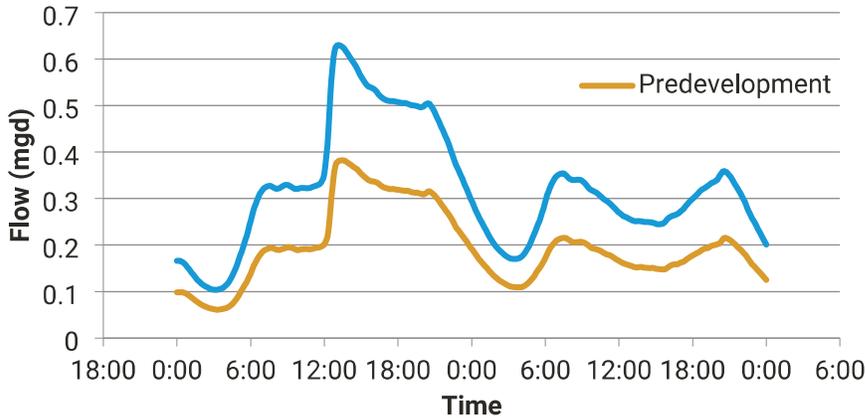


Figure 3 Peak Flow at MH-14726

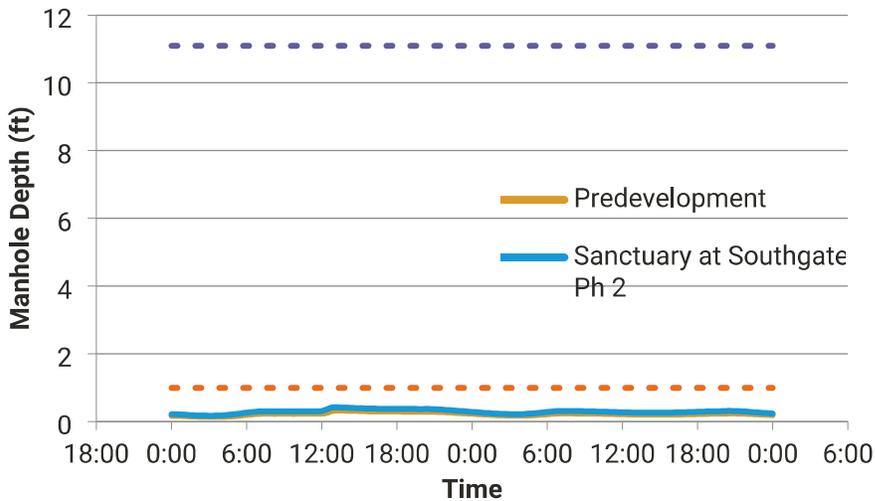


Figure 4 Peak Depth at MH-14726

The graphs in Figure 5 and Figure 6 below show the flow and depth in the sewer downstream of the new connection where the 8-inch sewer receives discharge from the Fieldstone pump station. The total flow at MH-6336 includes flows from Fieldstone, and the developments previously indicated within that service area. Depth was not observed in the model to exceed the crown of pipe at this point in the collection system. The peak flow in the pipe at this point before the Sanctuary at Southgate Phase 2 development was added was 0.44 mgd. With the development online, the peak flow increased to 0.69 mgd.

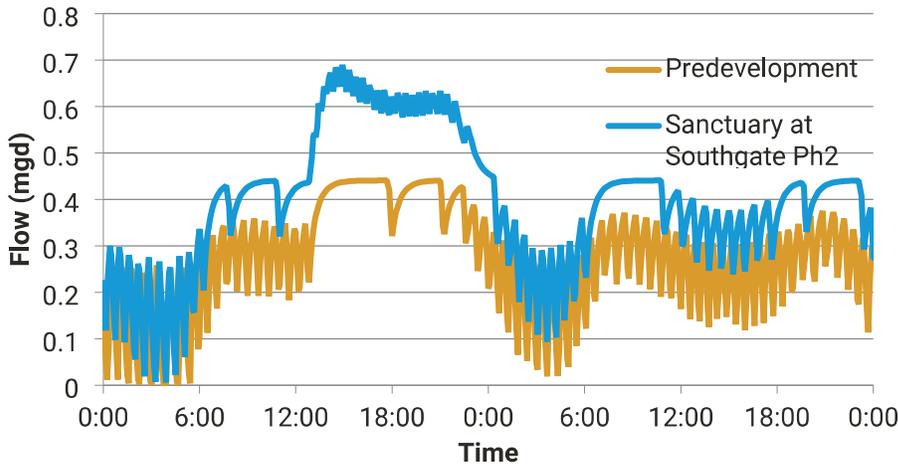


Figure 5 Peak Wet Weather Flow at MH-6336

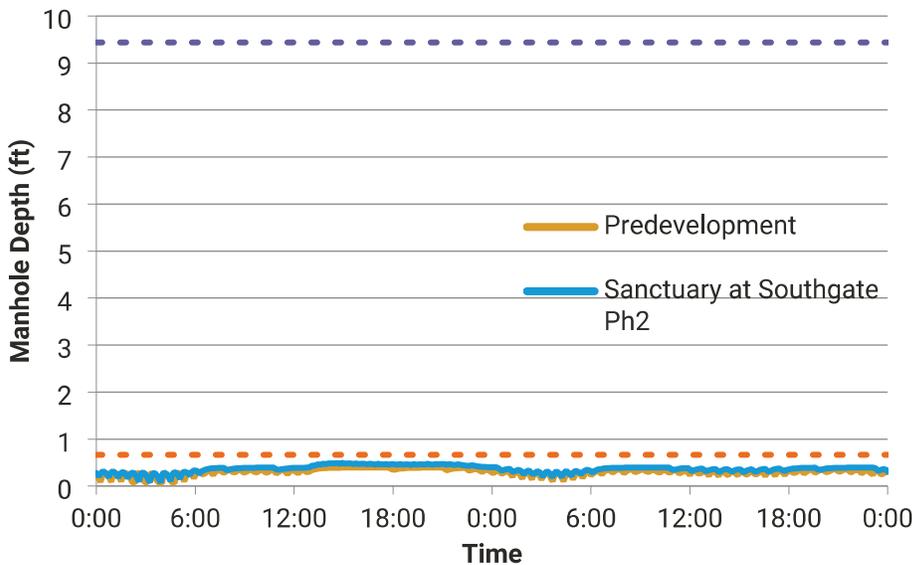


Figure 6 Peak Depth at MH-6336

Sewer capacity evaluations for the alternative flow route, sending project flows to the Porter Ridge pump station service area, were very similar to the results of the evaluation for the original connection point. The effect of moving the development’s proposed flows to a more downstream point essentially return flows to predevelopment conditions upstream of the Porter Ridge pump station discharge manhole. There were no capacity limitations in the modeled 12-inch sewer in the original flow route, or in in the alternative flow route. This alternate flow route has no effect on the model results obtained at the Fieldstone or Poplin Road pump stations downstream. The capacity of the Porter Ridge pump station was not evaluated in this analysis, but it is recommended that the station’s average flow, obligated flows, and firm capacity be evaluated in order to further assess the impact of this development on that station.

FIELDSTONE PUMP STATION AND FORCE MAIN

Table 2 summarizes the dry weather flows at the Fieldstone pump station. The station was evaluated for capacity based on the most recent drawdown test data shown in Table 3 and the existing flows in the model. The criteria that would trigger an improvement for a pump station is the pump station not having firm capacity to pump the flows during a 1-year design storm. The firm capacity of the Fieldstone Pump Stations is 0.44 mgd. The average flows to the pump station are approximately 0.21 mgd; therefore, there is approximately 0.23 mgd of available capacity at the pump station. This project’s peak flows would exceed the allocation capacity of the station. The modeled peak flow to the Fieldstone pump station after the Sanctuary at Southgate development’s flows come online exceed the station’s firm capacity of 0.44 mgd. For these two reasons, there is not enough available capacity for the new development’s flows.

Table 2 Fieldstone Pump Station Dry Weather Flows

Average Flow (MGD)	Obligated Flow (MGD)	Total Flow (MGD)
0.09	0.12	0.21

Table 3 Fieldstone Pump Station Capacity

Fieldstone Pump Station			
Drawdown Test Date	Pump 1 Drawdown (MGD)	Pump 2 Drawdown (MGD)	Firm Capacity (MGD)
4/9/2020	0.44	0.45	0.44

POPLIN ROAD PUMP STATION AND FORCE MAIN

UCW provided draw down tests that approximated the Poplin Road Pump Station firm capacity at 4.0 mgd, however, as noted in the *Poplin Road Pump Station Alternatives Analysis* technical memo, the force main flow is limited because the allowable pressures of the force main are below the pressures caused by the firm capacity. Therefore, the flows were limited to 3.64 mgd. Table 4 summarizes the dry weather flows to the Poplin Road pump station. The model was run with the force main capacity limitation. and the existing flows into the Poplin Road Pump Station were estimated to be 4.07 mgd, which exceeds the wet weather capacity at the pump station. It should be noted that there is a planned CIP project to provide wet weather storage for the Poplin Road Pump Station by building a 3.0 mgd equalization basin for the wet weather flows. Once this project is implemented the capacity at the Poplin Road Pump Station can be reevaluated. This project is scheduled to be completed in the third quarter of 2023.

Table 4 Poplin Road Pump Station Dry Weather Flows

Average Flow (MGD)	Obligated Flow (MGD)	Total Flow (MGD)
1.04	0.32	1.36

RECOMMENDATION

Both the 12-inch and 8-inch gravity sewers associated with the development flows evaluated in this analysis are not predicted to surcharge under a 1-year storm event. The alternate flow path for this development has little effect on the analysis in terms of capacity based on the modeling results but requires the construction of off-site gravity sewer conveying flows to the Porter Ridge pump station service area. The Porter Ridge pump station capacity needs to be evaluated if the alternate route is further considered. The allocation and firm capacities of the Fieldstone pump station are exceeded with the addition of this project's proposed peak flows. It is not recommended that the 0.44 mgd firm capacity of the station be exceeded. Approval of the development flows connecting to the UCW collection system cannot be granted for this reason. Furthermore, the allocation and firm capacities of the Poplin Road pump station are exceeded with the addition of this project's proposed peak flows. Approval for this development is dependent on completion of the CIP improvement project that will install adequate flow equalization at the Poplin Road Pump Station. Once an equalization tank is installed, the storage volume will be sufficient to prevent backup in the gravity system upstream of the Poplin Rd Pump Station. It should be noted that the Poplin Road Pump Station is pumping at full capacity for extended periods of time to empty the wet weather equalization tank and the 24-inch gravity sewer downstream of the force main discharge location is at full capacity. The 3.0 mgd Poplin Road equalization basin project is expected to be completed in the third quarter of 2023. Until this project is completed, it is not recommended that the 3.64 mgd operational capacity of the station be exceeded.

The Twelve Mile Creek WRF has a rated capacity of 7.5 MGD. North Carolina law 15A NCAC 02T.0118, often referred to as the 80/90 rule, states that prior to exceeding 80% of the wastewater treatment system's permitted hydraulic capacity based on average flow of the last calendar year, an evaluation on meeting future wastewater needs must be submitted to the State. Additionally, at 90% plant capacity, final plans and specifications for expansion must be submitted and approved. Based on the 80/90 Rule, UC should be ready to submit an evaluation of their future treatment needs and outline plans going forward by the time the average annual flow exceeds 80% of the permitted treatment capacity (6 MGD). Current flows are approaching the 80% mark and UC should be prepared to submit an evaluation in the near future.

Very truly yours,
BLACK & VEATCH INTERNATIONAL COMPANY


Scot Thompson
Project Manager



NPH

cc: John Shutak, UCW
Jeff Coggins, BV
Katy Weidner BV

24 August 2023

Union County Water
500 N. Main Street, Suite 500
Monroe, NC 28112

Wastewater Collection System Analysis
Sanctuary at Southgate Phase 2 Revised
Black & Veatch Project
175886.8063

Attention: Crystal Outlaw Panico, PE

BACKGROUND

Union County Water (UCW) has requested that Black & Veatch update hydraulic analyses for the proposed Sanctuary at Southgate development utilizing UCW's collection system hydraulic model. Previous hydraulic analyses, reported in the recent April 2023 technical memo contain model results for project wastewater flows conveyed through the Fieldstone and Porter Ridge pump stations. This analysis is intended to evaluate the impacts along two alternative sewer routes: Sedgewick Rd sewer and Potomac Rd sewer. The proposed Sanctuary at Southgate Phase 2 development would be tributary to the Poplin Road pump station, which pumps receiving flows into the Twelve Mile Creek Basin.

DEVELOPMENT OVERVIEW

Based on the Utility Sketch Plan document prepared by BGE, Inc, dated July 7, 2022 the site will consist of 75 single family homes, 240 three-bedroom multi-family units, one clubhouse and pool, 24,500 SF of commercial development, a 200 seat restaurant, and an emergency response building. The development is located south of the intersection of Poplin Road and North Rocky River Road. The site is ±72 acres and Figure 1 shows a plan view of the proposed development.

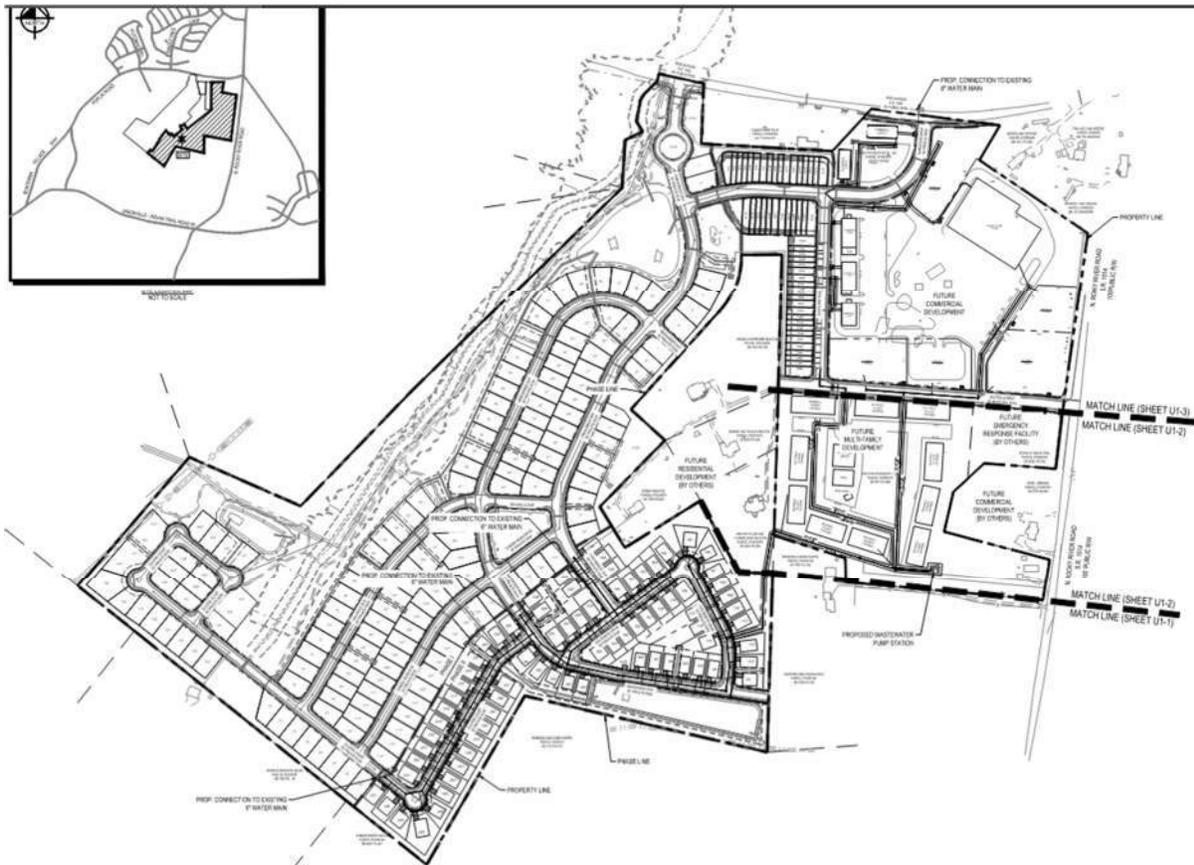


Figure 1 Development Overview

ESTIMATED DEVELOPMENT WASTEWATER FLOWS

The developer's sketch included an estimate of total average daily flow of 97,870 gpd for the development. Table 1 summarizes the development's wastewater flows. In addition to the average daily flow estimates provided by the developer, the peak wet weather flows were estimated using a peaking factor of 3 for single family homes and a peaking factor of 2.5 for multi-family homes and commercial. The peak flows incorporate an infiltration and inflow (I/I) flow component for the proposed development and is in line with the peaking factors observed in the UCW 2011 Comprehensive Master Plan I/I estimates for new developments.

Table 1 Sanctuary at Southgate Phase 2 Development Wastewater Flows Summary

Flow Source	Number of Units/Size	Unit	Unit Rates	Average Daily Flow (gpd)	Peak Wet Weather Flow (gpd)
Single Family Residential Units	75	Units	280	21,000	63,000
Multi-Family Units	720	Bedrooms	70	50,400	126,000
Pool	1	Unit	1,670	1,670	4,175
Clubhouse	10	Fixtures	250	2,500	6,250
Commercial / Retail	--	--	--	22,300*	55,750
Total				97,870	255,175
*Total commercial / retail calcs on project utility plans page U1-0 (total of 22,300 gpd) do not match page U1-1 calculations (total of 24,300 gpd).					

DEVELOPMENT ANALYSIS

Figure 2 is a map of the project location and contains a red and blue dashed lines indicating the potential wastewater flow paths for the development. The development contains an on-site pump station on the southeast portion of the site, according to site utility plans. The pump station would pump flows from Phase 2 of the development and discharge to the northwest across Poplin Rd into one of two possible gravity sewers along either Sedgewick Rd or Potomac Rd. From either discharge location, these gravity sewers convey flow approximately 2,000 feet to the Poplin Road Pump Station.

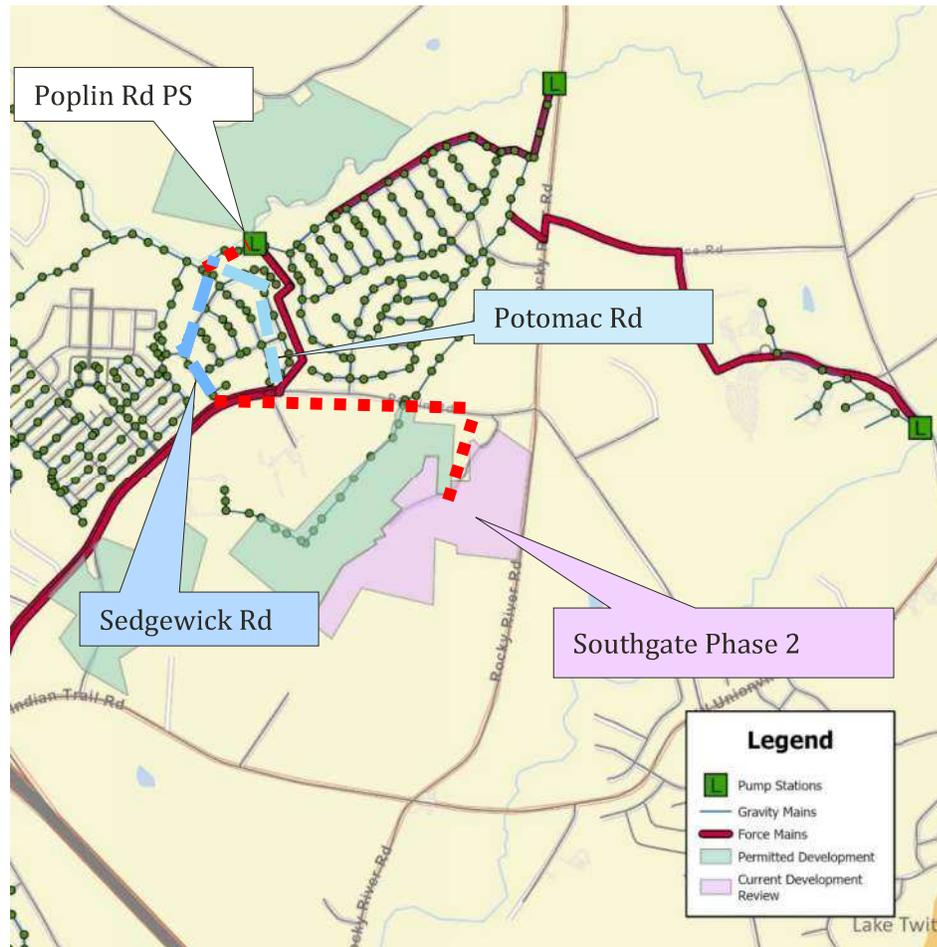


Figure 2 Development Location and Flow Paths

An initial model run was performed to simulate existing 2022 conditions within the Twelve Mile Creek model network under the 2022 Comprehensive Master Plan design storm event, a 1-year SCS Type II storm with a 24-hour duration. The 2022 model run was then adjusted to include the new Sanctuary at Southgate Phase 2 development. The impact to the collection system was compared to the predevelopment conditions including the receiving gravity sewer and the downstream system.

DEVELOPMENT RESULTS

The Sanctuary at Southgate Phase 2 pump station would pump flows from the project site to the northwest across Poplin Rd into either 8-inch sewer along Sedgewick Rd, or into 8-inch sewer along Potomac Rd. After being discharged to one of these 8-inch sewers, wastewater will flow downstream by gravity to the existing 36-inch sewer leading into the Poplin Rd pump station. The 2022 model was updated to show the new development flows going to the indicated connection point. Model flows were compared against the UCW criteria for

improvements in the wastewater collection system. The criteria that would trigger an improvement in the UCW gravity sewers is 50% of the MH depth surcharged above the crown of the pipe during a 1-year design storm.

The model predicts there will be no surcharge in pipes downstream of the development, and the addition of the Sanctuary at Southgate Phase 2 development flow does not increase the peak flows significantly. The peak flow to the Poplin Road pump station is 4.07 mgd; however, the firm pumping capacity of the Poplin Road pump station is limited to 3.64 mgd because of the allowable pressures in the force main. Therefore, the peak flows exceeded the flow capacity at the Poplin Road pump station.

There is available capacity for the Sanctuary at Southgate Phase 2 development to connect to the 8-inch sewers on both Sedgewick Rd and Potomac Rd. Surcharging in these sewers did not exceed the crown of the pipe and no SSOs were predicted in the downstream gravity systems. However, the current firm pumping capacity of the Poplin Road pump station is inadequate to handle the additional wet weather flows from the new development.

GRAVITY SEWERS

The graphs in Figures 3 through Figure 6 below show the flow and depth in the sewer downstream of the new connection at locations on both Sedgewick Rd and Potomac Rd where manhole depth is the least, meaning surcharging due to wet weather flow would be of most concern. The total flow at MH-6276 (Sedgewick route) and MH-6281 (Potomac route) includes the obligated flows, as well as flows from the Sanctuary at Southgate Phase 2 development flows. Depth was not observed in the model to exceed the crown of pipe at these points in the collection system. Flow at these points prior to the development flows being added to the model were 0.0141 mgd and 0.0013 mgd, and increased to 0.313 mgd and 0.304 mgd, respectively, after Sanctuary at Southgate Phase 2 flows were added.

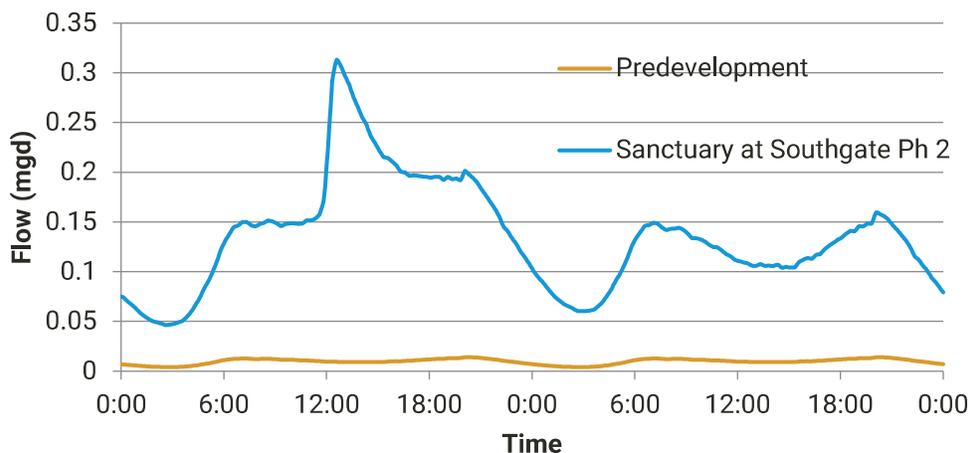


Figure 3 Peak Flow at MH-6276 (Sedgewick Route)

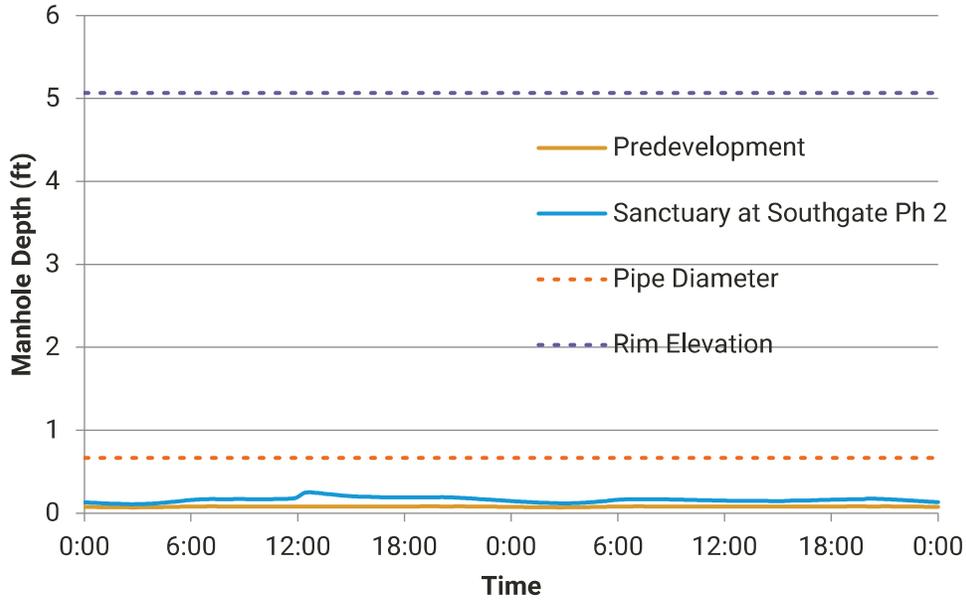


Figure 4 Peak Depth at MH-6276 (Sedgewick Route)

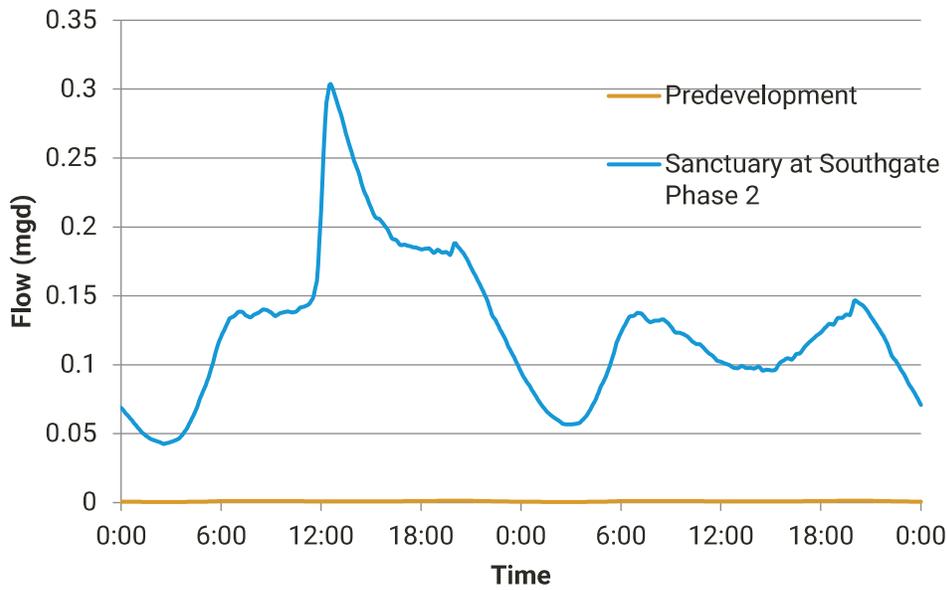


Figure 5 Peak Wet Weather Flow at MH-6281 (Potomac Route)

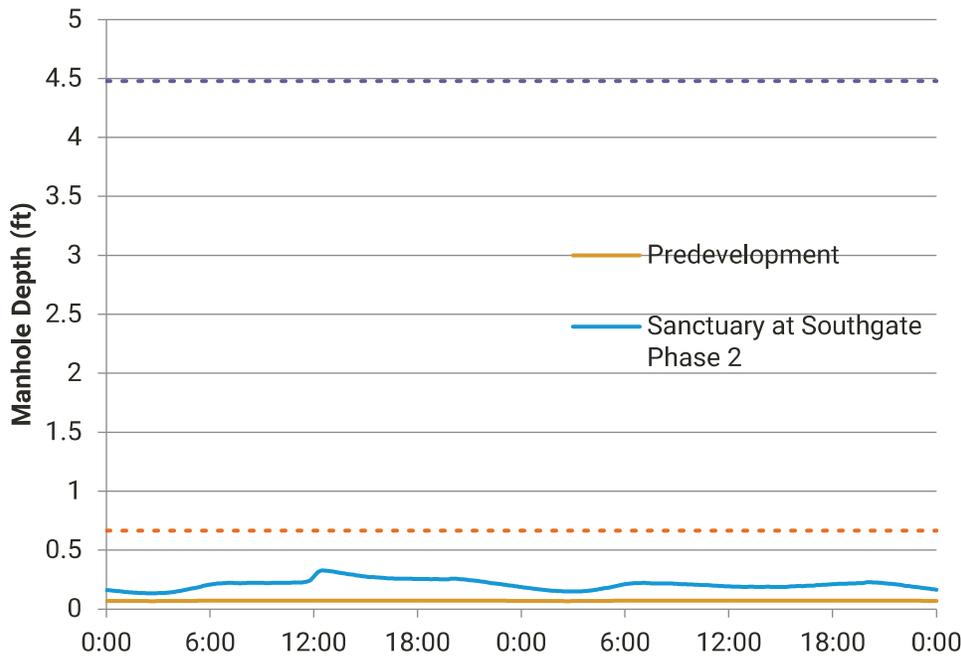


Figure 6 Peak Depth at MH-6281 (Potomac Route)

POPLIN ROAD PUMP STATION AND FORCE MAIN

UCW provided draw down tests that approximated the Poplin Road Pump Station firm capacity at 4.0 mgd, however, as noted in the *Poplin Road Pump Station Alternatives Analysis* technical memo, the force main flow is limited because the allowable pressures of the force main are below the pressures caused by the firm capacity. Therefore, the flows were limited to 3.64 mgd. Table 2 summarizes the dry weather flows to the Poplin Road pump station. The model was run with the force main capacity limitation, and the existing flows into the Poplin Road Pump Station were estimated to be 4.07 mgd, which exceeds the wet weather capacity at the pump station. It should be noted that there is an ongoing CIP project to provide wet weather storage for the Poplin Road Pump Station by building a 4.0 MG equalization basin for wet weather flows. Once this project is implemented the capacity at the Poplin Road Pump Station can be reevaluated. This project is scheduled to be completed in the third quarter of 2023.

Table 2 Poplin Road Pump Station Dry Weather Flows

Average Flow (MGD)	Obligated Flow (MGD)	Total Flow (MGD)
1.04	0.32	1.36

RECOMMENDATION

Both 8-inch gravity sewer discharge alternatives evaluated in this analysis are not predicted to surcharge under a 1-year storm event. Either location is viable from a capacity standpoint. The allocation and firm capacities of the Poplin Road pump station are exceeded with the addition

of this project's proposed peak flows. Approval for this development is dependent on completion of the CIP improvement project that will provide flow equalization at the Poplin Road Pump Station. At that point, the storage volume will be sufficient to prevent backup in the gravity system upstream of the Poplin Road Pump Station. It should be noted that the model runs project the Poplin Road Pump Station to be pumping at full capacity for extended periods of time to empty the equalization basin; meanwhile, the 24-inch gravity sewer downstream of the force main discharge location is at full capacity. Until the Poplin Road Pump Station EQ Basin project is completed, it is not recommended that the 3.64 mgd operational capacity of the station be exceeded.

The Twelve Mile Creek WRF has a rated capacity of 7.5 MGD. North Carolina law 15A NCAC 02T.0118, often referred to as the 80/90 rule, states that prior to exceeding 80% of the wastewater treatment system's permitted hydraulic capacity based on average flow of the last calendar year, an evaluation on meeting future wastewater needs must be submitted to the State. Additionally, at 90% plant capacity, final plans and specifications for expansion must be submitted and approved. Based on the 80/90 Rule, UC should be ready to submit an evaluation of their future treatment needs and outline plans going forward by the time the average annual flow exceeds 80% of the permitted treatment capacity (6 MGD). Current flows are approaching the 80% mark and UC should be prepared to submit an evaluation in the near future.

Very truly yours,
BLACK & VEATCH INTERNATIONAL COMPANY


Scot Thompson
Project Manager

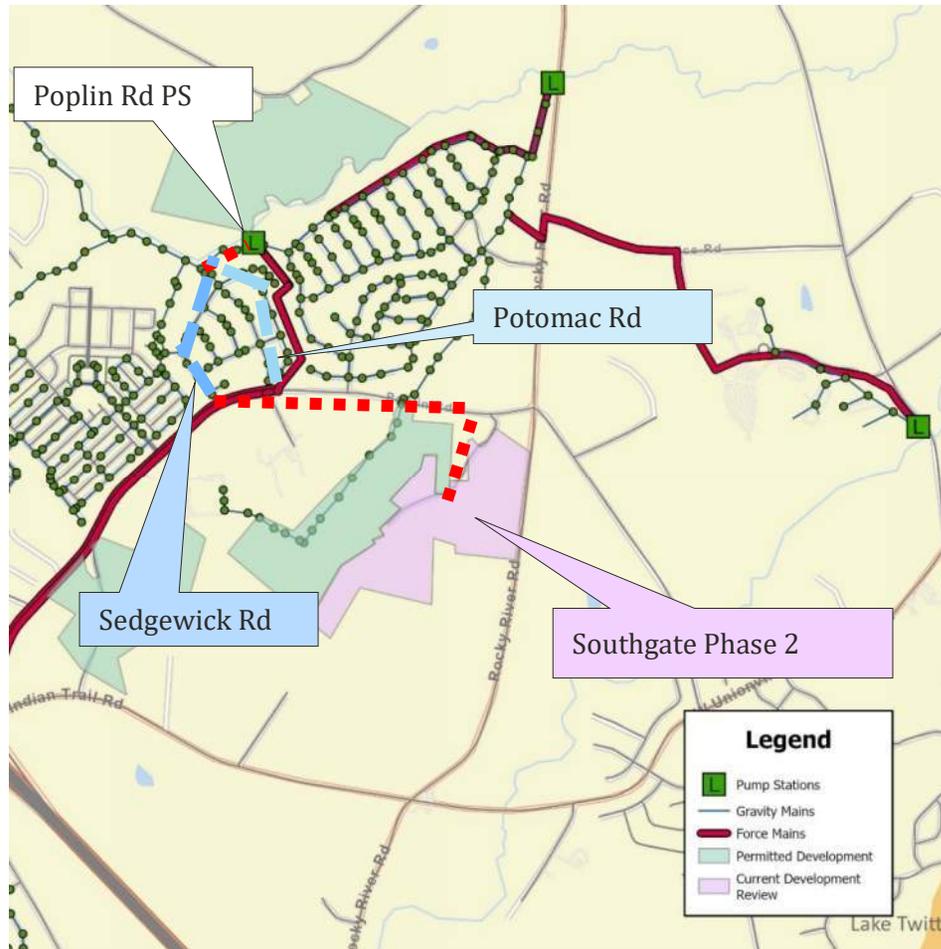


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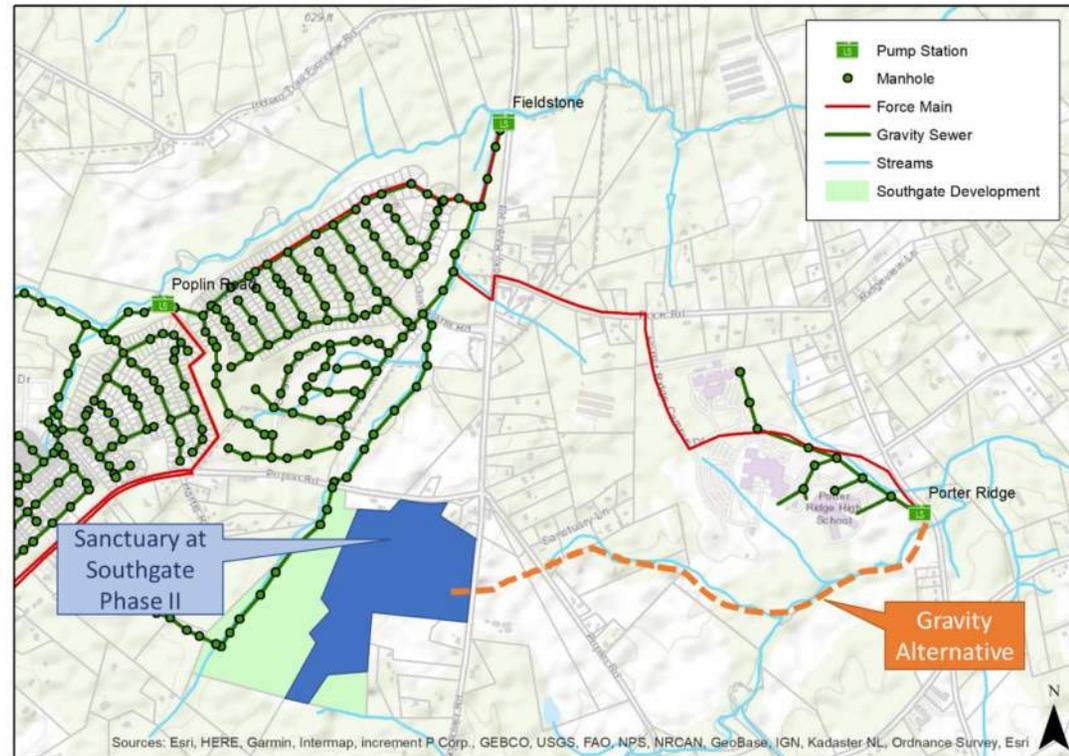
cc: John Shutak, UCW
Jeff Coggins, BV
Katy Weidner BV
Nathan Hampton BV

APPENDIX 7 - PUMP STATION ALTERNATIVES

ALTERNATIVE 1



ALTERNATIVE 2

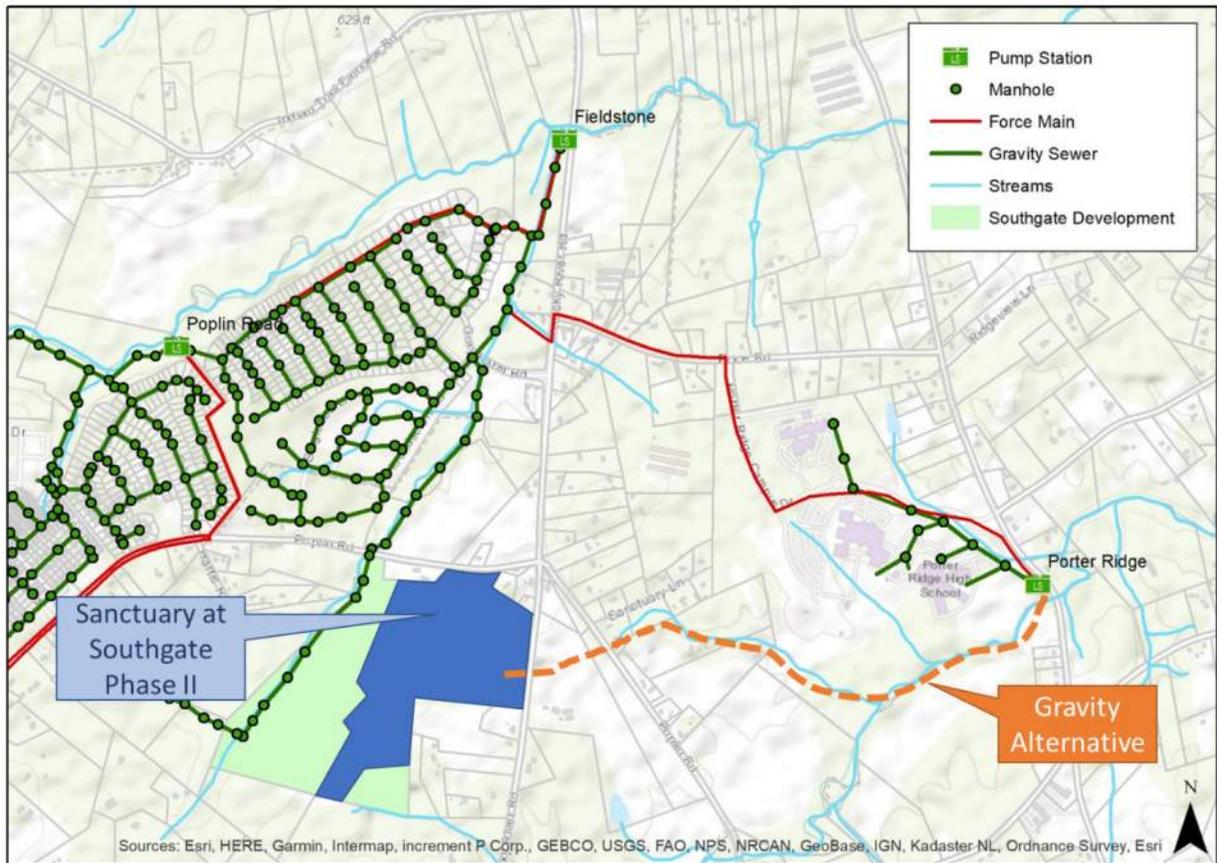


Note: The Alternative 2 graphic was developed by Black & Veatch and included in the Sanctuary at Southgate Gravity Alternative Calculations, dated 11/21/2023 (See Appendix 7).

Figure 2 Development Location and Flow Paths

Note: Alternative 1 is defined in Black & Veatch's Phase 2 Wastewater Collection System Analysis, dated 8/24/2024, and Figure 2 is included in the report (See Appendix 6).

Union County Water – Sanctuary at Southgate Gravity Calculations



Known Information and Assumptions:

- Sanctuary at Southgate is located at Poplin Rd and Rocky River Rd.
- The nearest Union County infrastructure downstream of the development is the Porter Ridge Pump Station
- Flow Calculations
 - Flow for the Sanctuary at Southgate Phase 2 project were outlined in the received sketch plan
- Slope assumptions using the approximate ground slope from Digital Elevation model:
 - The gravity sewer from the development location to the South Fork of Crooked Creek would be 4,900 ft. The elevation change is 24 ft. The ground slope is approximately 0.49%.
 - The sewer along the South Fork of Crooked Creek is 2200 ft and would need to be installed at minimum slope (0.4%).
- Length of sewer: 7,100 ft
- Manning's $n=0.013$

Estimated Flow in Sewer

	Avg Flow (gpd)	Wet Weather Flow (gpd)
Sanctuary at Southgate Phase II	97,870	255,175

0.255 mgd = 0.395 cfs

Pipe Size Calculations

$$d = \left(\frac{(Q * n)}{(0.46 * \sqrt{S})} \right)^{3/8} = \left(\frac{(0.395 * 0.013)}{(0.46 * \sqrt{0.004})} \right)^{3/8} = 0.50 \text{ ft} = 6 \text{ in}$$

Since the minimum gravity size is an 8-inch, a pipe diameter of **8 inches** is recommended for the gravity sewer.

Estimated Flow at Porter Ridge Pump Station

Porter Ridge Existing Firm Capacity = 180 gpm = 0.259 mgd

School WW Peaking Factor = 2.5

- Porter Ridge HS, assumed 1800 students, 100 faculty
 - 15 gal/student
 - 27,000 gpd
- Porter Ridge MS, assumed 1300 students, 70 faculty
 - 15 gal/student
 - 19,500 gpd
- Porter Ridge ES, assumed 600 students, 40 faculty
 - 12 gal/student
 - 7,200 gpd

	Avg Flow (gpd)	Wet Weather Flow (gpd)
Current Porter Ridge Flows (schools)	53,700	134,250
Sanctuary at Southgate Phase II	97,870	255,175
Total		389,425

0.389 mgd = 0.602 cfs = 270.4 gpm

Recommendation: Replace the Porter Ridge PS pumps with 275 gpm pumps at 105 ft of head. This larger size would not provide for any additional capacity for future upstream connections. The 6-inch force main is adequately sized. The velocity in the 6-inch force main would be about 3 fps at a flow of 270 gpm.

Fieldstone Pumps: The 2 pumps would need to be swapped for new pumps at a design point of 490 gpm at approximately 102 ft of head. This would be enough flow for the current obligated flows and the

Sanctuary at Southgate development. This would not allow for any capacity for future upstream connections.

Fieldstone Force Main: The 6-inch force main would be fine. At 490 gpm, the velocity in the force main is 5.5 fps, and the discharge pressure is reasonable.

Fieldstone Wet Well: The new pump would pump almost twice as much flow as the existing pumps. We would need to review the drawings to determine if improvements were needed to limit the number of on/off cycles.

Final List of Projects:

- 7,100 ft of 8-inch gravity sewer from the development site to the Porter Ridge PS
- 2 new pumps at the Porter Ridge PS (275 gpm at 105 feet of head)
- 2 new pumps at the Fieldstone PS (490 gpm at 102 feet of head)
- The pump sizing at each station is increasing by 30-50%. Wet Well Improvements may be required depending on size of new pumps and existing wet well, both ensure to fit the pumps themselves fit in the pump slots and that the size provides adequate volume to limit the number of on/off cycles. The sizing of the existing electrical systems and the generator should also be assessed to determine whether they can support the larger pumps.



APPENDIX 9 - NEW SOUTHGATE MIXED USE PUMP STATION CALCULATIONS

Pump Station Sizing and Cycles

Project Name: Sanctuary at Southgate PS Designed By: APG Date: 12/20/2024
 Project Location: UCPW in Indian Trail Checked By: _____ Date: _____
 BGE Project #: 7734-16 Revised By: _____ LMK _____

Wet Well Elevations

Ground Elev = <u>608.00</u>	High Level Alarm Elev = <u>595.00</u>
Sewer Invert Elev = <u>596.00</u>	Lag Pump On Elev = <u>594.00</u>
Force Main Discharge Elev = <u>603.33</u>	Lead Pump On Elev = <u>593.00</u>
Top of Pump Elev = <u>590.00</u>	Pumps Off Elev = <u>590.50</u>
Pump Suction Elev = <u>587.50</u>	Low Level Alarm Elev = <u>590.00</u>
Wet Well Sump Elev = <u>587.25</u>	

Wet Well Dimensions

Wet Well Diameter = <u>6.00</u>	Wet Well Active Storage Depth = <u>2.50</u>
Wet Well Storage per Foot = <u>28.3 cf/ft</u>	Wet Well Active Storage Volume = <u>528.7 gal.</u>
Wet Well Storage per Foot = <u>211.5 gal./ft</u>	

Pump Station Cycles

1. Cycles at Beginning of Life

Pump Rate at Beginning of Life = <u>225.00 gpm</u>	Cycle Time T = <u>11.1 min.</u>
Active Storage Volume = <u>528.7 gal.</u>	Cycles Per Hour = <u>5.38</u>
Design Daily Flow = <u>68.0 gpm</u>	

Inflow Rate (gpm)	Pump Rate (gpm)	Net Flow Rate Out (gpm)	Draw Down Time (gpm)	Time to Fill (min)	Cycle Time (min)	Cycles Per Hour	Volume Pumped
1	225.00	224.00	2.36	528.73	531.09	0.11	531.09
50	225.00	175.00	3.02	10.57	13.60	4.41	679.80
<u>67.97 gpm</u>	225.00	157.03	3.37	7.78	11.15	5.38	757.57
100	225.00	125.00	4.23	5.29	9.52	6.30	951.71
150	225.00	75.00	7.05	3.52	10.57	5.67	1586.19
<u>177.20 gpm</u>	225.00	47.80	11.06	2.98	14.05	4.27	2489.05
224	225.00	1.00	528.73	2.36	531.09	0.11	118964.26

2. Cycles at End of Life

Pump Rate at End of Life = <u>200.00 gpm</u>	Cycle Time T = <u>11.8 min.</u>
Active Storage Volume = <u>528.7 gal.</u>	Cycles Per Hour = <u>5.09</u>
Design Daily Flow = <u>68.0 gpm</u>	

Inflow Rate (gpm)	Pump Rate (gpm)	Net Flow Rate Out (gpm)	Draw Down Time (gpm)	Time to Fill (min)	Cycle Time (min)	Cycles Per Hour
1	200.00	199.00	2.66	528.73	531.39	0.11
50	200.00	150.00	3.52	10.57	14.10	4.26
<u>67.97 gpm</u>	200.00	132.03	4.00	7.78	11.78	5.09
100	200.00	100.00	5.29	5.29	10.57	5.67
150	200.00	50.00	10.57	3.52	14.10	4.26
<u>177.20 gpm</u>	200.00	22.80	23.19	2.98	26.18	2.29
199	200.00	1.00	528.73	2.66	531.39	0.11



Pump Station Major Losses

Project Name: Sanctuary at Southgate PS
 Project Location: UCPW in Indian Trail
 BGE Project #: 7734-16

Designed By: APG Date: 12/20/2024
 Checked By: _____ Date: _____
 LMK _____ Date: _____

Pump Station Major Losses

1. Static Head

Force Main Max CL Elevation = 630.00
 Pump Suction Elevation = 587.50
 Static Head = **42.50 ft.**

2. Suction Head

Pumps Off Elev = 590.50
 Pump Suction Elev = 587.50
 Suction Head = **-3.00 ft.**

3. Friction Head

Pipe Size (in.)	Pipe Material	Pipe Length (ft.)	Inside Diameter (in.)	B.O.L. Pump Rate (gpm)	B.O.L. Hazen Williams Coefficient	B.O.L. Velocity (ft/sec)	E.O.L. Pump Rate (gpm)	E.O.L. Hazen Williams Coefficient	E.O.L. Velocity (ft/sec)
4	DI	40	4.18	225	125	5.26	200	100	4.67
4	PVC-SDR 18	0	4.23	225	140	5.14	200	120	4.56
6	DI	0	6.40	225	125	2.24	200	100	1.99
6	PVC-SDR 18	5460	6.09	225	140	2.48	200	120	2.20
8	DI	0	8.55	225	125	1.26	200	100	1.12
8	PVC-SDR 18	0	7.98	225	140	1.44	200	120	1.28

Beginning of Life Friction Head = **21.87 ft.**

End of Life Friction Head = **23.56 ft.**



Pump Station Minor Losses and Total Head Losses

Project Name: Sanctuary at Southgate PS Designed By: APG Date: 12/20/2023
 Project Location: UCPW in Indian Trail Checked By: _____ Date: _____
 BGE Project #: 7734-16 Revised By: _____ Date: _____

Pump Station Minor Losses

1. Fitting Losses

Pipe Size (in.)	Fitting Description	Friction Loss Coefficient (k)	B.O.L. Velocity (ft/sec)	B.O.L. Head Loss (ft.)	E.O.L. Velocity (ft/sec)	E.O.L. Head Loss (ft.)
4	Std. 90° Bend	0.51	5.26	0.22	4.67	0.17
4	Std. 90° Bend	0.51	5.26	0.22	4.67	0.17
4	Plug Valve	0.31	5.26	0.13	4.67	0.11
4	Swing Check Valve	0.90	5.26	0.39	4.67	0.31
4	Tee-Branch	1.02	5.26	0.44	4.67	0.35
6	Tee-Through	0.90	2.24	0.07	1.99	0.06
6	4x6 Increase	0.28	2.24	0.02	1.99	0.02
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	45° Bend	0.24	2.24	0.02	1.99	0.01
6	22.5° Bend	0.12	2.24	0.01	1.99	0.01
6	22.5° Bend	0.12	2.24	0.01	1.99	0.01
6	Pipe Exit	1.00	2.24	0.08	1.99	0.06

Beginning of Life Friction Head = 1.94
 End of Life Friction Head = 1.53

Pump Station Total Head Losses

1. Beginning of Life Total Head Losses

Static Head = 42.50
 Suction Head = -3.00
 Friction Head Losses = 21.87
 Fitting Head Losses = 1.94
 Total System Head = 63.31 ft.

2. End of Life Total Head Losses

Static Head = 42.50
 Suction Head = -3.00
 Friction Head Losses = 23.56
 Fitting Head Losses = 1.53
 Total System Head = 64.60 ft.



Pump Station System Table

Project Name: Sanctuary at Southgate PS Designed By: APG Date: 12/20/2023
 Project Location: UCPW in Indian Trail Checked By: _____ Date: _____
 BGE Project #: 7734-16 Revised By: _____ Date: _____

Pump Station Minor Losses

1. Fitting Losses

Pump Rate (gpm)	Avg. Velocity (ft/sec)	Fitting Head Loss (ft.)	B.O.L. Friction Head Loss (ft.)	B.O.L. Total System Head (ft.)	E.O.L. Friction Head Loss (ft.)	E.O.L. Total System Head (ft.)	Head from NP 3171 Pump Curve
0	0.00	0.00	0.00	39.50	0.00	39.50	183.5
50	0.55	0.08	1.31	40.89	1.74	41.32	
100	1.11	0.33	4.71	44.54	6.27	46.10	175.5
150	1.66	0.75	9.97	50.22	13.28	53.52	
200	2.21	1.33	16.98	57.81	22.60	63.44	167.5
250	2.77	2.08	25.66	67.24	34.16	75.74	
300	3.32	2.99	35.96	78.45	47.86	90.35	161.0
350	3.87	4.07	47.82	91.40	63.65	107.23	
400	4.42	5.32	61.22	106.04	81.49	126.31	154.0
450	4.98	6.74	76.13	122.36	101.33	147.57	
500	5.53	8.32	92.51	140.33	123.14	170.95	147.0
550	6.08	10.06	110.35	159.91	146.88	196.44	
600	6.64	11.98	129.62	181.10	172.53	224.01	142.5
650	7.19	14.05	150.31	203.86	200.07	253.63	
700	7.74	16.30	172.40	228.20	229.47	285.27	136.0



Anti-Floatation Sizing

Project Name: Sanctuary at Southgate PS Designed By: APG Date: 12/20/2023
 Project Location: UCPW in Indian Trail Checked By: APG Date: 12/20/2023
 BGE Project #: 7734-16 Revised By: _____

Wet Well Dimensions

Top of Wet Well Elev = 609.00
 Finished Grade Elev = 608.00
 Wet Well Sump Elev = 587.25
 Wet Well Diameter = 6.00 ft.
 Top Slab Thickness = 1.00 ft.
 Wall Thickness = 0.67 ft.
 Base Thickness = 1.00 ft.
 Antifloatation Base Diameter = 14.00 ft.
 Antifloatation Base Thickness = 2.00 ft.
 Depth of Wet Well embedded into Antifloatation
 Base = 2.00 ft.
 Volume of Top Slab = 42.31 cu. ft.
 Volume of Wet Well = 878.01 cu. ft.
 Volume of Base = 42.31 cu. ft.
 Vol. of Antifloatation Base = 223.25 cu. ft.
 Total Vol. of Wet Well = 1185.89 cu. ft.

Buoyant Force of Wet Well = 73,999.37 lbs.

Unit Weights

Unit Weight of Concrete = 150 lbs./cu. ft.
 Unit Weight of Saturated Soil = 105 lbs./cu. ft.
 Unit Weight of Water = 62.4 lbs./cu. ft.

Wet Well Weights

Weight of Top Slab = 6,347.07 lbs.
 Weight of Wet Well = 43,697.83 lbs.
 Weight of Base = 6,347.07 lbs.
 Weight. of Antifloatation Base = 33,487.27 lbs.
 Total Weight of Wet Well = 89,879.24 lbs.

Soil Weight Above Antifloatation Base

Volume of Soil = 2204.58 cu. ft.
 Weight of Soil = 231,480.77 lbs.

Anti-Buoyant Force of Wet Well = 146,404.53 lbs.

Factor of Safety = 1.98 FS Should be above 1.2

APPENDIX 10 - NEW SOUTHGATE MIXED USE PUMP STATION - FLYGT NP 3153 PUMP

NP 3153 HT 3~ 466

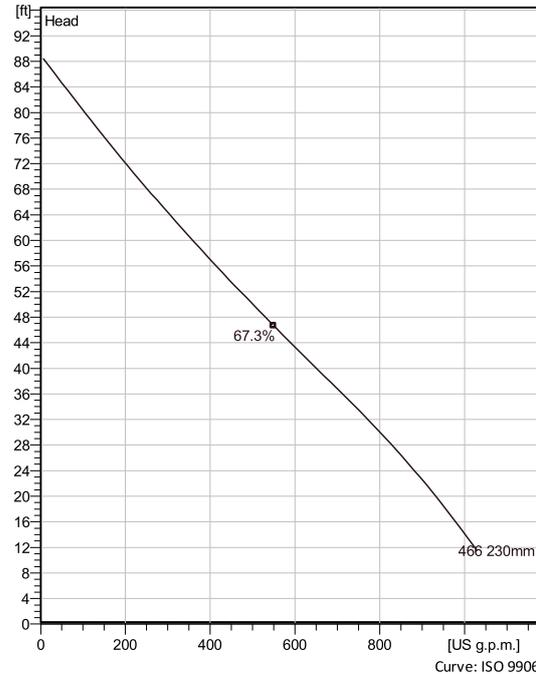
Patented self cleaning semi-open channel impeller, ideal for pumping in waste water applications. Modular based design with high adaptation grade.



Technical specification



Curves according to: Water, pure Water, pure [100%], 39.2 °F, 62.42 lb/ft³, 1.6891E-5 ft²/s



Nominal (mean) data shown. Under- and over-performance from this data should be expected due to standard manufacturing tolerances. Please consult your local Flygt representative for performance guarantees.

Configuration

Motor number N3153.185 21-15-4AA-W 12hp	Installation type P - Semi permanent, Wet
Impeller diameter 230 mm	Discharge diameter 4 inch

Pump information

Impeller diameter 230 mm
Discharge diameter 4 inch
Inlet diameter 150 mm
Maximum operating speed 1765 rpm
Number of blades 2
Max. fluid temperature 40 °C

Material

Impeller Hard-Iron™

Project Xylect-21617014
Block

Created by Kyle Pohle
Created on 12/21/2023 **Last update** 12/21/2023

NP 3153 HT 3~ 466

Technical specification



Motor - General

Motor number N3153.185 21-15-4AA-W 12hp	Phases 3~	Rated speed 1765 rpm	Rated power 12 hp
ATEX approved No	Number of poles 4	Rated current 16 A	Stator variant 5
Frequency 60 Hz	Rated voltage 460 V	Insulation class H	Type of Duty S1
Version code 185			

Motor - Technical

Power factor - 1/1 Load 0.78	Motor efficiency - 1/1 Load 88.5 %	Total moment of inertia 1.91 lb ft ²	Starts per hour max. 30
Power factor - 3/4 Load 0.71	Motor efficiency - 3/4 Load 88.5 %	Starting current, direct starting 114 A	
Power factor - 1/2 Load 0.58	Motor efficiency - 1/2 Load 87.0 %	Starting current, star-delta 38 A	

Project	Xylect-21617014	Created by	Kyle Pohle		
Block		Created on	12/21/2023	Last update	12/21/2023

NP 3153 HT 3~ 466

Performance curve

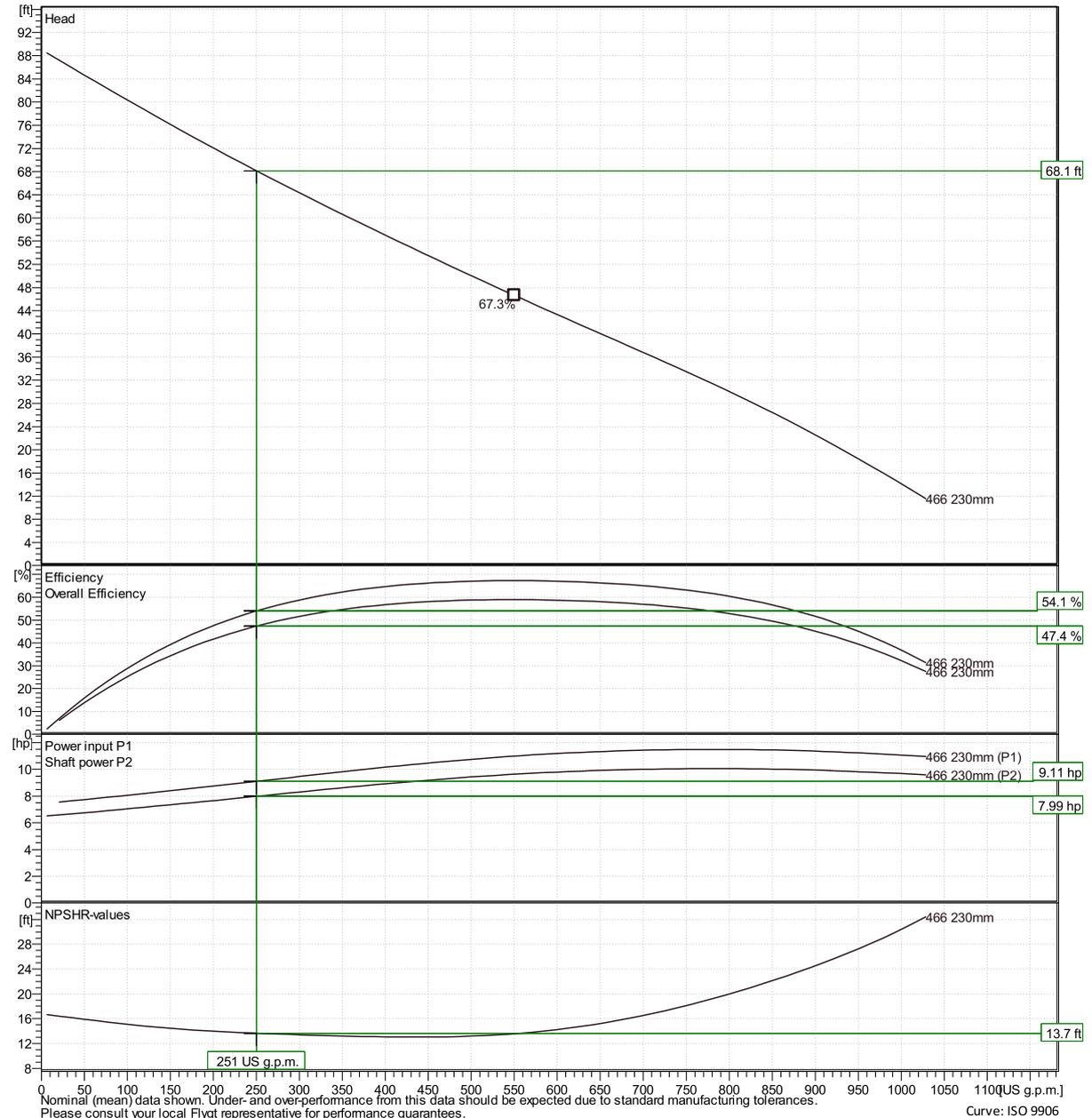


Duty point

Flow
251 US g.p.m.

Head
68.1 ft

Curves according to: Water, pure Water, pure [100%], 39.2 °F, 62.42 lb/ft³, 1.6891E-5 ft²/s



Nominal (mean) data shown. Under- and over-performance from this data should be expected due to standard manufacturing tolerances. Please consult your local Flygt representative for performance guarantees. Curve: ISO 9906

Xylect-21617014

Kyle Pohle

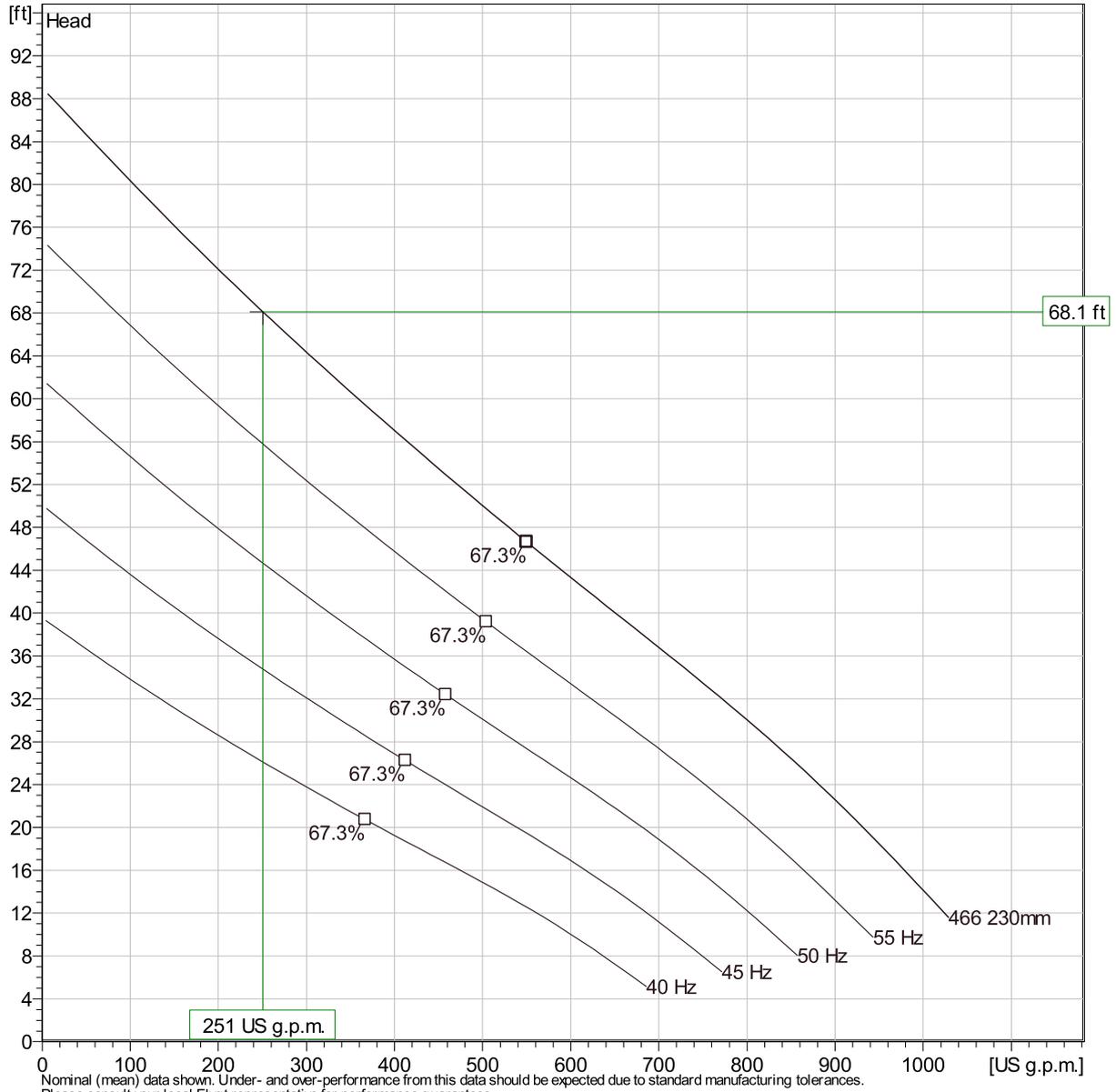
Created on 12/21/2023 Last update 12/21/2023

NP 3153 HT 3~ 466

Duty Analysis



Curves according to: Water, pure [100%]; 39.2°F; 62.42lb/ft³; 1.6891E-5ft²/s



Operating characteristics

Pumps / Systems	Flow US g.p.m.	Head ft	Shaft power hp	Flow US g.p.m.	Head ft	Shaft power hp	Hydr. eff.	Spec. Energy kWh/US MG	NPSHre ft
1	251	68.1	7.99	251	68.1	7.99	54.1 %	452	13.7

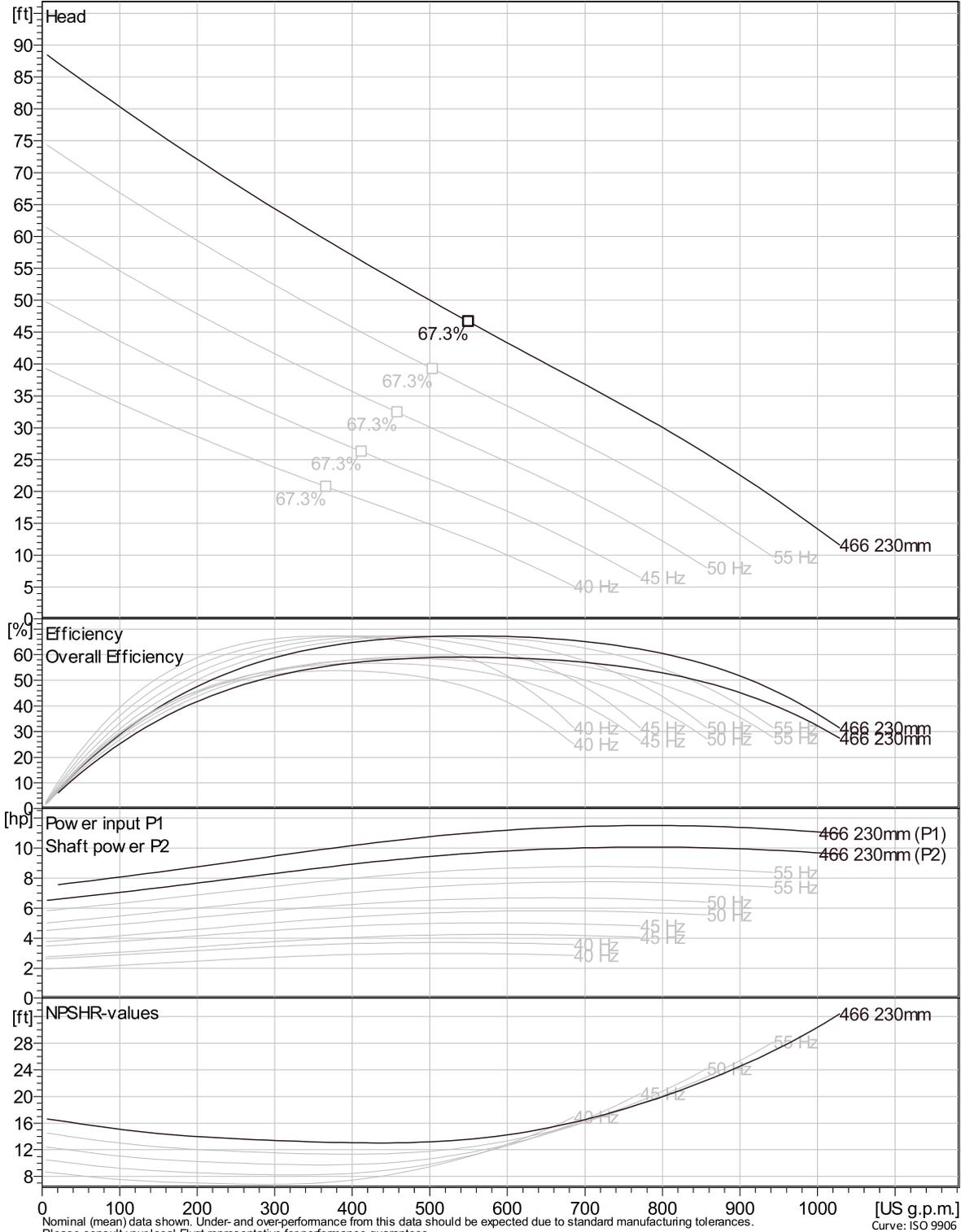
Project		Created by	Kyle Pohle
Block	Xylect-21617014	Created on	12/21/2023
		Last update	12/21/2023

NP 3153 HT 3~ 466

VFD Curve



Curves according to: Water, pure, 39.2 °F, 62.42 lb/ft³, 1.6891E-5 ft²/s

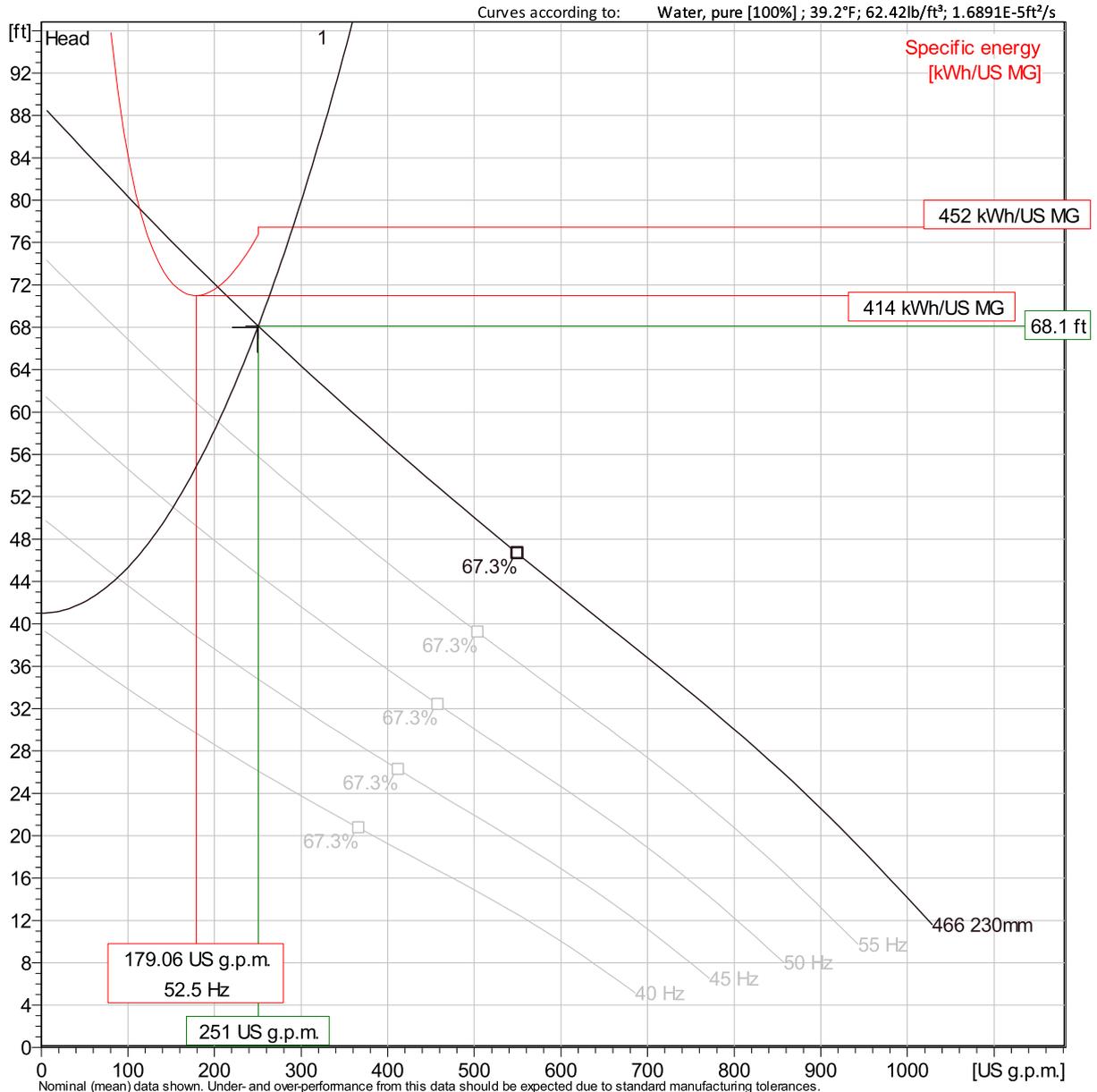


Nominal (mean) data shown. Under- and over-performance from this data should be expected due to standard manufacturing tolerances. Please consult your local Flygt representative for performance guarantees. Curve: ISO 9906

Project	Xylect-21617014	Created by	Kyle Pohle
Block		Created on	12/21/2023
		Last update	12/21/2023

NP 3153 HT 3~ 466

VFD Analysis



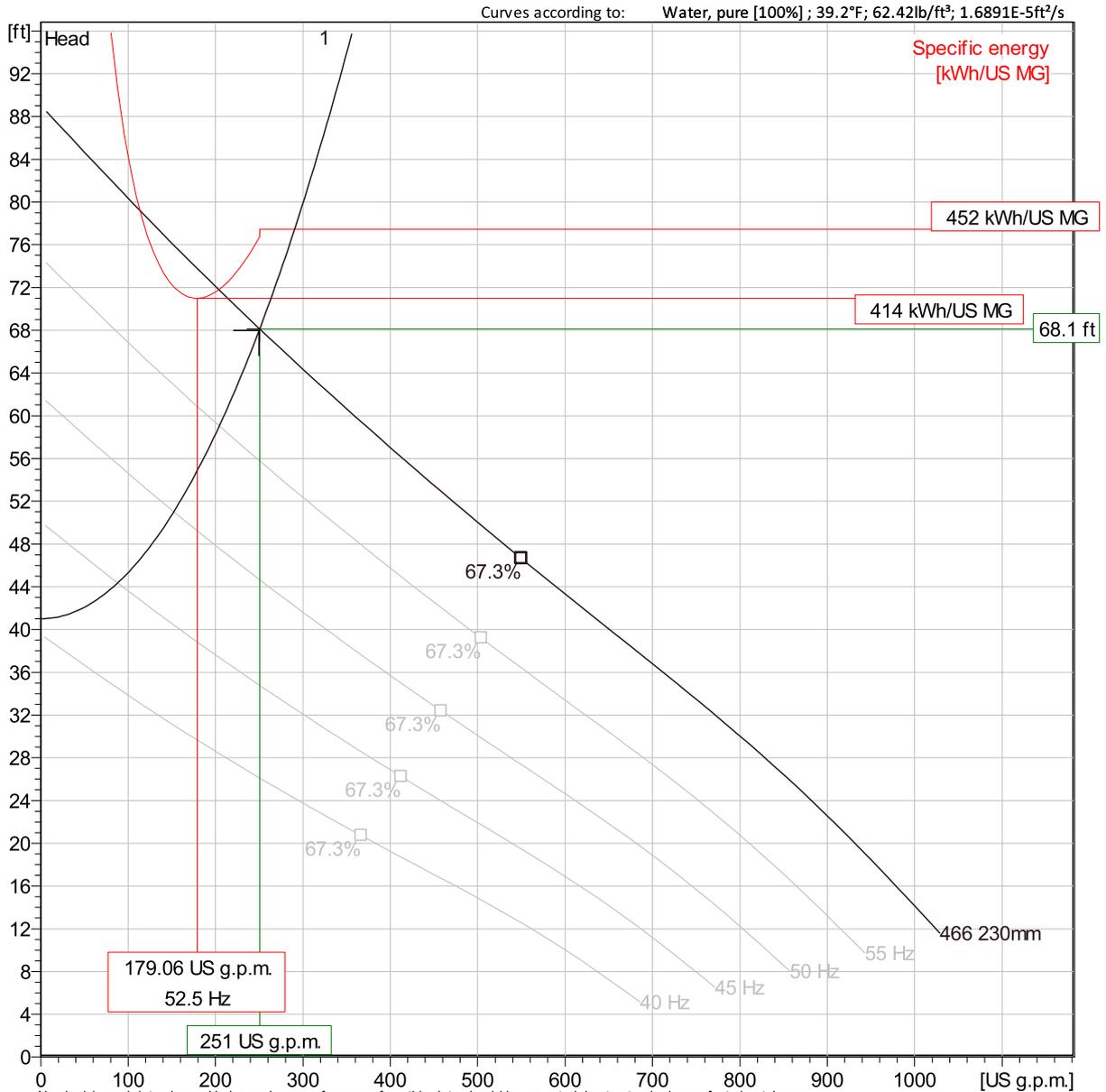
Operating Characteristics

Pumps / Systems	Frequency	Flow	Head	Shaft power	Flow	Head	Shaft power	Hydr. eff.	Specific energy	NPSHre
		US g.p.m.	ft	hp	US g.p.m.	ft	hp		kWh/US MG	
1	60 Hz	251	68.1	7.99	251	68.1	7.99	54.1 %	452	13.7
1	55 Hz	204	59	6.02	204	59	6.02	50.8 %	419	12
1	50 Hz	152	51	4.37	152	51	4.37	45 %	420	10.6
1	45 Hz	88.2	44.4	3.02	88.2	44.4	3.02	32.8 %	528	9.37

Project	Xylect-21617014	Created by	Kyle Pohle
Block		Created on	12/21/2023
		Last update	12/21/2023

NP 3153 HT 3~ 466

VFD Analysis



Nominal (mean) data shown. Under- and over-performance from this data should be expected due to standard manufacturing tolerances. Please consult your local Flygt representative for performance guarantees.

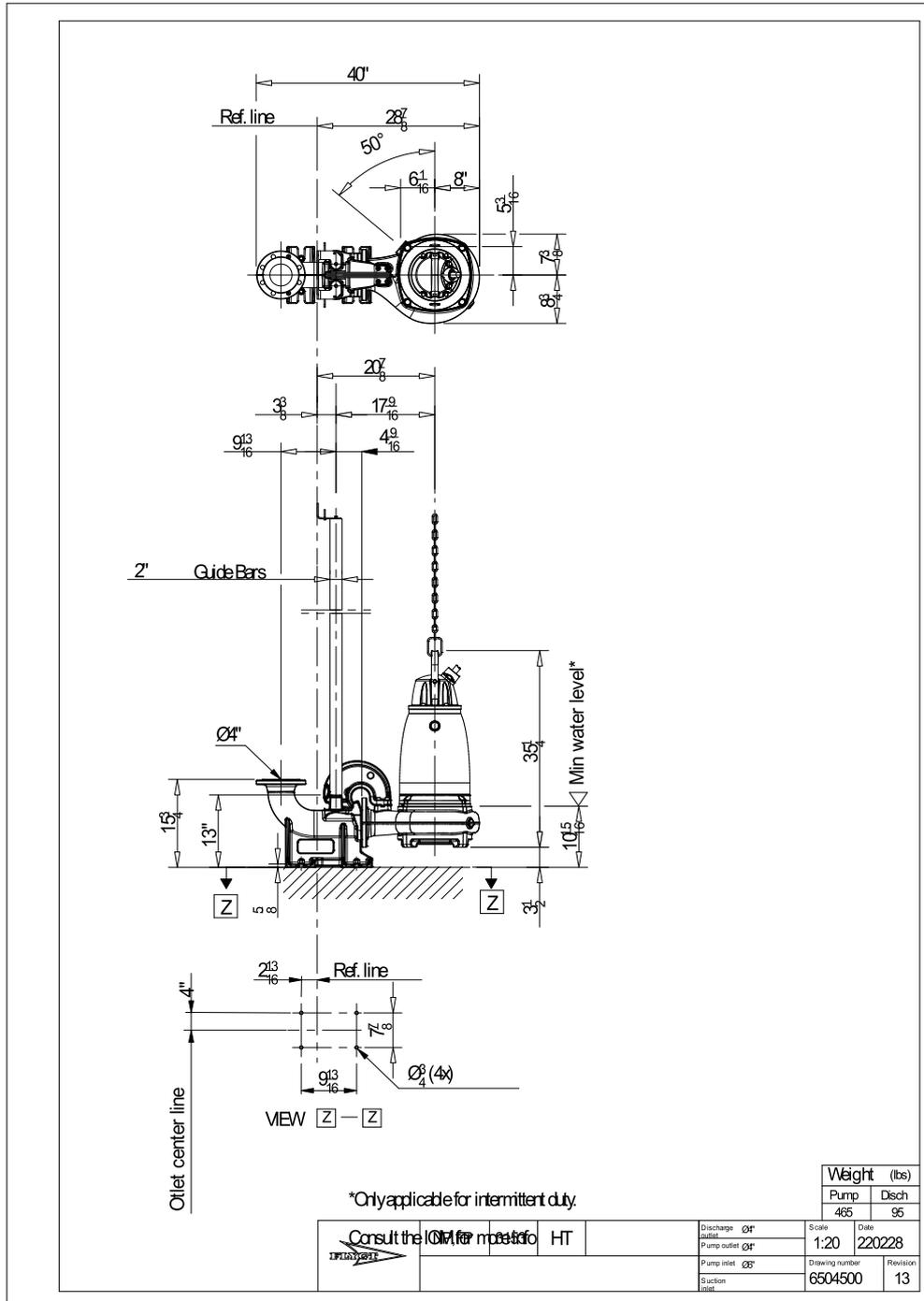
Operating Characteristics

Pumps / Systems	Frequency	Flow US g.p.m.	Head ft	Shaft power hp	Flow US g.p.m.	Head ft	Shaft power hp	Hydr. eff.	Specific energy kWh/US MG	NPSHre ft
1	40 Hz									

Project	Xylect-21617014	Created by	Kyle Pohle
Block		Created on	12/21/2023
		Last update	12/21/2023

NP 3153 HT 3~ 466

Dimensional drawing



Project	Xylect-21617014	Created by	Kyle Pohle
Block		Created on	12/21/2023
		Last update	12/21/2023

APPENDIX 11 - ALTERNATIVE 1 LIFE CYCLE COST ANALYSIS

Life Cycle Cost Analysis Southgate Mixed Use Alternative 1 - On-Site Pump Station with Gravity Sewer Connection at Annandale Subdivision				
Inputs and Assumptions				
Planning Period	20	Years	O&M Costs (% of Capital for Pump Stations)	3%
Discount Rate	1.55%		10-year Items (% of Total for Pump Stations)	5%
Inflation	3.20%		20-year Items (% of Total for Pump Stations)	60%
			50-year Items (% of Total for Pump Stations)	35%
Initial Capital Investment				
Item	Quantity	UOM	Cost Per Unit	Cost
6" PVC Sanitary Sewer Force Main	5460	LF	\$60	\$327,600
New Sanctuary at Southgate Phase II Pump Station	1	LS	\$963,000	\$963,000
			Total	\$1,290,600
Annual Costs				
Electrical Cost	\$0.08	kWH		
Flygt NP 3127 HT 3~ 488				
Pump On Time Per Cycle (min)	11.15			
Pump Cycles Per Hour	5.38			
Flygt NP 3153 HT 3~ 466 Pump Horsepower	11			
Ave Daily Flow Rate (GPM)	68			
US MG / Year	35.73			
Pump Spec Energy (kWh/US MG)	408			
Yearly Cost of Electricity	\$1,166.33			
Yearly Cost of Pump Station O&M	\$38,718.00			
Total Yearly Costs at Year 0	\$39,884.33			
Total Annual Costs NPV	\$919,441.58			
Life-Cycle Replacement Costs				
Cost 10-year Items at Year 0	\$64,530.00			
Cost 10-year Items at Year 10	\$88,421.65			
NPV of 10-Year Items at Year 10	\$75,815.74			
Cost 10-year Items at Year 20	\$121,158.98			
NPV of 10-Year Items at Year 20	\$89,075.25			
Cost 20-Year Items at Year 0	\$774,360.00			
Cost 20-Year Items at Year 20	\$1,453,907.77			
NPV of 20-Year Items at Year 20	\$1,068,903.02			
Total Life-Cycle Replacement Costs NPV	\$1,233,794.00			
Residual Values				
Cost of 10-year Items at Year 20	\$121,158.98			
Cost of 20-year Items at Year 20	\$1,453,907.77			
Residual Value of 50-Year Items at Year 20	\$271,026.00			
Total Life-Cycle Replacement Residual Value at Year 20	\$1,846,092.75			
Total Residual Value NPV	\$1,357,234.72			
Total Net Present Value	\$2,086,600.86			

APPENDIX 12 - PORTER RIDGE PUMP STATION CALCULATIONS



Pump Station Design Flows

Project Name: Porter Ridge PS
 Project Location: UCPW in Indian Trail
 BGE Project #: 7734-16

Designed By: APG Date: 12/20/2024
 Checked By: _____ Date: _____
 Revised By: _____ Date: _____

Proposed Uses

2. Phase II

Use	Units	Quantity Per Unit		Population	Daily Flow Per	Daily Flow Per Use
Existing Schools			1 Lot	0.0		53,700 gpd
Sanctuary at Southgate Single Family			1 Person	0.0		21,000 gpd
Sanctuary at Southgate Multi-Family and Commercial			1 Person	0.0		76,870 gpd

Design Flow

Proposed Flow = 151,570 gpd
 Design Daily Flow = 151,570 gpd

Design Daily Flow = **105.26 gpm**

Peak Hourly Flow = 389,425 gpd
 Peak Hourly Flow = **270.43 gpm**

Proposed Population = _____ people
 Total Population = _____ people
 Single Family
 Peaking Factor = 3.00
 Multi-Family and
 Commercial Peaking Factor = 2.50



Pump Station Sizing and Cycles

Project Name: Porter Ridge PS Designed By: APG Date: 12/20/2024
 Project Location: UCPW in Indian Trail Checked By: _____ Date: _____
 BGE Project #: 7734-16 Revised By: _____ LMK _____

Wet Well Elevations

Ground Elev = <u>590.00</u>	High Level Alarm Elev = <u>577.50</u>
Sewer Invert Elev = <u>577.92</u>	Lag Pump On Elev = <u>576.75</u>
Force Main Discharge Elev = <u>585.33</u>	Lead Pump On Elev = <u>576.00</u>
Top of Pump Elev = <u>573.00</u>	Pumps Off Elev = <u>573.00</u>
Pump Suction Elev = <u>570.50</u>	Low Level Alarm Elev = _____
Wet Well Sump Elev = <u>570.00</u>	

Wet Well Dimensions

Wet Well Diameter = <u>6.00</u>	Wet Well Active Storage Depth = <u>3.00</u>
Wet Well Storage per Foot = <u>28.3 cf/ft</u>	Wet Well Active Storage Volume = <u>634.5 gal.</u>
Wet Well Storage per Foot = <u>211.5 gal./ft</u>	

Pump Station Cycles

1. Cycles at Beginning of Life

Pump Rate at Beginning of Life = <u>300.00 gpm</u>	Cycle Time T = <u>9.3 min.</u>
Active Storage Volume = <u>634.5 gal.</u>	Cycles Per Hour = <u>6.46</u>
Design Daily Flow = <u>105.3 gpm</u>	

Inflow Rate (gpm)	Pump Rate (gpm)	Net Flow Rate Out (gpm)	Draw Down Time (gpm)	Time to Fill (min)	Cycle Time (min)	Cycles Per Hour	Volume Pumped
1	300.00	299.00	2.12	634.48	636.60	0.09	636.60
50	300.00	250.00	2.54	12.69	15.23	3.94	761.37
<u>105.26 gpm</u>	300.00	194.74	3.26	6.03	9.29	6.46	977.40
160	300.00	140.00	4.53	3.97	8.50	7.06	1359.59
225	300.00	75.00	8.46	2.82	11.28	5.32	2537.90
<u>270.43 gpm</u>	300.00	29.57	21.46	2.35	23.81	2.52	6437.90
299	300.00	1.00	634.48	2.12	636.60	0.09	190342.82

2. Cycles at End of Life

Pump Rate at End of Life = <u>275.00 gpm</u>	Cycle Time T = <u>9.8 min.</u>
Active Storage Volume = <u>634.5 gal.</u>	Cycles Per Hour = <u>6.14</u>
Design Daily Flow = <u>105.3 gpm</u>	

Inflow Rate (gpm)	Pump Rate (gpm)	Net Flow Rate Out (gpm)	Draw Down Time (gpm)	Time to Fill (min)	Cycle Time (min)	Cycles Per Hour
1	275.00	274.00	2.32	634.48	636.79	0.09
50	275.00	225.00	2.82	12.69	15.51	3.87
<u>105.26 gpm</u>	275.00	169.74	3.74	6.03	9.77	6.14
160	275.00	115.00	5.52	3.97	9.48	6.33
225	275.00	50.00	12.69	2.82	15.51	3.87
<u>270.43 gpm</u>	275.00	4.57	138.96	2.35	141.30	0.42
274	275.00	1.00	634.48	2.32	636.79	0.09



Pump Station Major Losses

Project Name: Porter Ridge PS
 Project Location: UCPW in Indian Trail
 BGE Project #: 7734-16

Designed By: APG Date: 12/20/2024
 Checked By: _____ Date: _____
 LMK _____ Date: _____

Pump Station Major Losses

1. Static Head

Force Main Max CL Elevation = 613.00
 Pump Suction Elevation = 570.50
 Static Head = **42.50 ft.**

2. Suction Head

Pumps Off Elev = 573.00
 Pump Suction Elev = 570.50
 Suction Head = **-2.50 ft.**

3. Friction Head

Pipe Size (in.)	Pipe Material	Pipe Length (ft.)	Inside Diameter (in.)	B.O.L. Pump Rate (gpm)	B.O.L. Hazen Williams Coefficient	B.O.L. Velocity (ft/sec)	E.O.L. Pump Rate (gpm)	E.O.L. Hazen Williams Coefficient	E.O.L. Velocity (ft/sec)
4	DI	0	4.18	300	125	7.01	275	100	6.43
4	PVC-SDR 18	0	4.23	300	140	6.85	275	120	6.28
6	DI	0	6.40	300	125	2.99	275	100	2.74
6	PVC-SDR 18	8000	6.09	300	140	3.30	275	120	3.03
8	DI	0	8.55	300	125	1.68	275	100	1.54
8	PVC-SDR 18	0	7.98	300	140	1.92	275	120	1.76

Beginning of Life Friction Head = **51.65 ft.**

End of Life Friction Head = **58.48 ft.**



Pump Station System Table

Project Name: Porter Ridge PS
 Project Location: UCPW in Indian Trail
 BGE Project #: 7734-16

Designed By: APG
 Checked By: _____
 Revised By: _____

Date: 12/20/2024
 Date: _____
 Date: _____

Pump Station Minor Losses

1. Fitting Losses

Pump Rate (gpm)	Avg. Velocity (ft/sec)	Fitting Head Loss (ft.)	B.O.L. Friction Head Loss (ft.)	B.O.L. Total System Head (ft.)	E.O.L. Friction Head Loss (ft.)	E.O.L. Total System Head (ft.)	Head from NP 3171 Pump Curve
0	0.00	0.00	0.00	40.00	0.00	40.00	183.5
50	0.55	0.08	1.88	41.96	2.50	42.58	
100	1.10	0.33	6.77	47.10	9.00	49.33	175.5
150	1.65	0.75	14.33	55.07	19.05	59.80	
200	2.20	1.33	24.39	65.72	32.44	73.77	167.5
250	2.75	2.08	36.86	78.94	49.02	91.10	
300	3.30	2.99	51.65	94.64	68.69	111.68	161.0
350	3.85	4.07	68.69	112.76	91.36	135.43	
400	4.40	5.32	87.94	133.26	116.96	162.28	154.0
450	4.96	6.74	109.35	156.08	145.43	192.17	
500	5.51	8.32	132.88	181.20	176.73	225.05	147.0
550	6.06	10.06	158.50	208.57	210.81	260.87	
600	6.61	11.98	186.19	238.16	247.63	299.60	142.5
650	7.16	14.05	215.90	269.96	287.15	341.20	
700	7.71	16.30	247.63	303.93	329.34	385.64	136.0

APPENDIX 13 - FIELDSTONE PUMP STATION CALCULATIONS



Pump Station Design Flows

Project Name: Fieldstone PS
 Project Location: UCPW in Indian Trail
 BGE Project #: 7734-16

Designed By: APG Date: 12/20/2024
 Checked By: _____ Date: _____
 Revised By: _____ Date: _____

Proposed Uses

2. Phase II

Use	Units	Quantity Per Unit	Population	Daily Flow Per Unit	Daily Flow Per Use
Existing Flows		1 Lot	0.0		90,000 gpd
Permitted Flows		1 Lot	0.0		122,180 gpd
Sanctuary at Southgate Single-Family		1 Person	0.0		21,000 gpd
Sanctuary at Southgate Multi-Family and Commercial		1 Person	0.0		76,870 gpd

Design Flow

$$\begin{aligned} \text{Proposed Flow} &= \frac{310,050 \text{ gpd}}{1} \\ \text{Design Daily Flow} &= \frac{310,050 \text{ gpd}}{1} \\ \text{Design Daily Flow} &= \boxed{215.31 \text{ gpm}} \end{aligned}$$

$$\begin{aligned} \text{Peak Hourly Flow} &= \frac{785,625 \text{ gpd}}{1} \\ \text{Peak Hourly Flow} &= \boxed{545.57 \text{ gpm}} \end{aligned}$$

$$\begin{aligned} \text{Proposed Population} &= \frac{\quad}{1} \text{ people} \\ \text{Total Population} &= \frac{\quad}{1} \text{ people} \\ \text{Single Family Peaking Factor} &= \frac{3.00}{1} \\ \text{Multi-Family and Commercial Peaking Factor} &= \frac{2.50}{1} \end{aligned}$$



Pump Station Sizing and Cycles

Project Name: Fieldstone PS Designed By: APG Date: 12/20/2024
 Project Location: UCPW in Indian Trail Checked By: _____ Date: _____
 BGE Project #: 7734-16 Revised By: _____ LMK _____

Wet Well Elevations

Ground Elev = <u>591.82</u>	High Level Alarm Elev = <u>570.50</u>
Sewer Invert Elev = <u>570.42</u>	Lag Pump On Elev = <u>570.00</u>
Force Main Discharge Elev = <u>588.50</u>	Lead Pump On Elev = <u>569.00</u>
Top of Pump Elev = <u>566.50</u>	Pumps Off Elev = <u>566.50</u>
Pump Suction Elev = <u>563.53</u>	Low Level Alarm Elev = _____
Wet Well Sump Elev = <u>563.20</u>	

Wet Well Dimensions

Wet Well Diameter = <u>10.00</u>	Wet Well Active Storage Depth = <u>2.50</u>
Wet Well Storage per Foot = <u>78.5 cf/ft</u>	Wet Well Active Storage Volume = <u>1468.7 gal.</u>
Wet Well Storage per Foot = <u>587.5 gal./ft</u>	

Pump Station Cycles

1. Cycles at Beginning of Life

Pump Rate at Beginning of Life = <u>600.00 gpm</u>	Cycle Time T = <u>10.6 min.</u>
Active Storage Volume = <u>1468.7 gal.</u>	Cycles Per Hour = <u>5.64</u>
Design Daily Flow = <u>215.3 gpm</u>	

Inflow Rate (gpm)	Pump Rate (gpm)	Net Flow Rate Out (gpm)	Draw Down Time (gpm)	Time to Fill (min)	Cycle Time (min)	Cycles Per Hour	Volume Pumped
1	600.00	599.00	2.45	1468.69	1471.15	0.04	1471.15
150	600.00	450.00	3.26	9.79	13.06	4.60	1958.26
<u>215.31 gpm</u>	600.00	384.69	3.82	6.82	10.64	5.64	2290.73
300	600.00	300.00	4.90	4.90	9.79	6.13	2937.39
450	600.00	150.00	9.79	3.26	13.06	4.60	5874.78
<u>545.57 gpm</u>	600.00	54.43	26.98	2.69	29.68	2.02	16190.78
599	600.00	1.00	1468.69	2.45	1471.15	0.04	881216.74

2. Cycles at End of Life

Pump Rate at End of Life = <u>560.00 gpm</u>	Cycle Time T = <u>11.1 min.</u>
Active Storage Volume = <u>1468.7 gal.</u>	Cycles Per Hour = <u>5.41</u>
Design Daily Flow = <u>215.3 gpm</u>	

Inflow Rate (gpm)	Pump Rate (gpm)	Net Flow Rate Out (gpm)	Draw Down Time (gpm)	Time to Fill (min)	Cycle Time (min)	Cycles Per Hour
1	560.00	559.00	2.63	1468.69	1471.32	0.04
150	560.00	410.00	3.58	9.79	13.37	4.49
<u>215.31 gpm</u>	560.00	344.69	4.26	6.82	11.08	5.41
300	560.00	260.00	5.65	4.90	10.54	5.69
450	560.00	110.00	13.35	3.26	16.62	3.61
<u>545.57 gpm</u>	560.00	14.43	101.80	2.69	104.49	0.57
599	560.00	1.00	1468.69	2.63	1471.32	0.04



Pump Station Major Losses

Project Name: Fieldstone PS
 Project Location: UCPW in Indian Trail
 BGE Project #: 7734-16

Designed By: APG Date: 12/20/2024
 Checked By: _____ Date: _____
 LMK _____ Date: _____

Pump Station Major Losses

1. Static Head

Force Main Max CL Elevation = 625.00
 Pump Suction Elevation = 563.53
 Static Head = **61.47 ft.**

2. Suction Head

Pumps Off Elev = 566.50
 Pump Suction Elev = 563.53
 Suction Head = **-2.97 ft.**

3. Friction Head

Pipe Size (in.)	Pipe Material	Pipe Length (ft.)	Inside Diameter (in.)	B.O.L. Pump Rate (gpm)	B.O.L. Hazen Williams Coefficient	B.O.L. Velocity (ft/sec)	E.O.L. Pump Rate (gpm)	E.O.L. Hazen Williams Coefficient	E.O.L. Velocity (ft/sec)
4	DI	0	4.18	600	125	14.02	560	100	13.09
4	PVC-SDR 18	0	4.23	600	140	13.69	560	120	12.78
6	DI	0	6.40	600	125	5.98	560	100	5.58
6	PVC-SDR 18	4400	6.09	600	140	6.61	560	120	6.17
8	DI	0	8.55	600	125	3.35	560	100	3.13
8	PVC-SDR 18	0	7.98	600	140	3.85	560	120	3.59

Beginning of Life Friction Head = **102.40 ft.**

End of Life Friction Head = **119.88 ft.**



Pump Station Minor Losses and Total Head Losses

Project Name: Fieldstone PS Designed By: APG Date: 12/20/2024
 Project Location: UCPW in Indian Trail Checked By: _____ Date: _____
 BGE Project #: 7734-16 Revised By: _____ Date: _____

Pump Station Minor Losses

1. Fitting Losses

Pipe Size (in.)	Fitting Description	Friction Loss Coefficient (k)	B.O.L. Velocity (ft/sec)	B.O.L. Head Loss (ft.)	E.O.L. Velocity (ft/sec)	E.O.L. Head Loss (ft.)
4	Std. 90° Bend	0.51	14.02	1.56	13.09	1.36
4	Std. 90° Bend	0.51	5.98	0.28	5.58	0.25
4	Plug Valve	0.31	5.98	0.17	5.58	0.15
4	Swing Check Valve	0.90	5.98	0.50	5.58	0.44
4	Tee-Branch	1.02	5.98	0.57	5.58	0.49
6	Tee-Through	0.90	5.98	0.50	5.58	0.44
6	4x6 Increase	0.28	5.98	0.16	5.58	0.14
6	45° Bend	0.24	5.98	0.13	5.58	0.12
6	45° Bend	0.24	5.98	0.13	5.58	0.12
6	45° Bend	0.24	5.98	0.13	5.58	0.12
6	45° Bend	0.24	5.98	0.13	5.58	0.12
6	45° Bend	0.24	5.98	0.13	5.58	0.12
6	45° Bend	0.24	5.98	0.13	5.58	0.12
6	45° Bend	0.24	5.98	0.13	5.58	0.12
6	45° Bend	0.24	5.98	0.13	5.58	0.12
6	45° Bend	0.24	5.98	0.13	5.58	0.12
6	45° Bend	0.24	5.98	0.13	5.58	0.12
6	45° Bend	0.24	5.98	0.13	5.58	0.12
6	22.5° Bend	0.12	5.98	0.07	5.58	0.06
6	22.5° Bend	0.12	5.98	0.07	5.58	0.06
6	Pipe Exit	1.00	5.98	0.56	5.58	0.48

Beginning of Life Friction Head = **5.89**
 End of Life Friction Head = **5.13**

Pump Station Total Head Losses

1. Beginning of Life Total Head Losses

Static Head = 61.47
 Suction Head = -2.97
 Friction Head Losses = 102.40
 Fitting Head Losses = 5.89
 Total System Head = **166.79 ft.**

2. End of Life Total Head Losses

Static Head = 61.47
 Suction Head = -2.97
 Friction Head Losses = 119.88
 Fitting Head Losses = 5.13
 Total System Head = **183.51 ft.**

NP 3153 HT 3~ 462

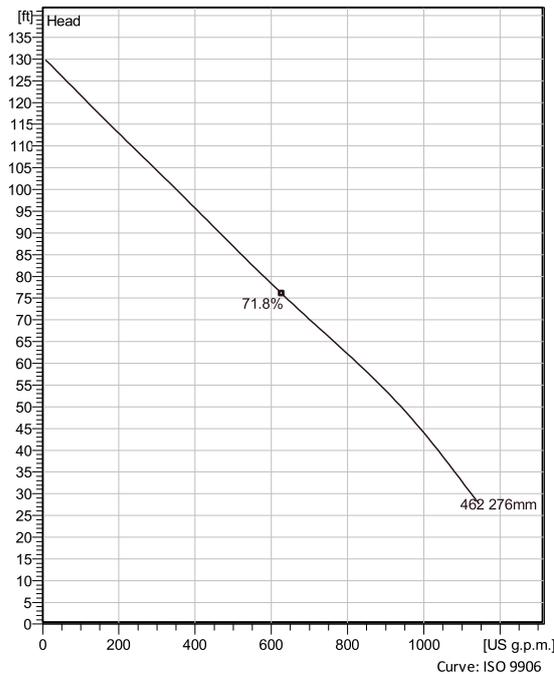
Patented self cleaning semi-open channel impeller, ideal for pumping in waste water applications. Modular based design with high adaptation grade.



Technical specification



Curves according to: Water, pure Water, pure [100%], 39.2 °F, 62.42 lb/ft³, 1.6891E-5 ft²/s



Nominal (mean) data shown. Under- and over-performance from this data should be expected due to standard manufacturing tolerances. Please consult your local Flygt representative for performance guarantees.

Configuration

Motor number N3153.185 21-18-4AA-W 20hp	Installation type P - Semi permanent, Wet
Impeller diameter 276 mm	Discharge diameter 4 inch

Pump information

Impeller diameter 276 mm
Discharge diameter 4 inch
Inlet diameter 150 mm
Maximum operating speed 1755 rpm
Number of blades 2
Max. fluid temperature 40 °C

Material

Impeller Hard-Iron™

Project	Xylect-20620257	Created by	Dan Joyce
Block		Created on	9/16/2024
		Last update	9/16/2024

NP 3153 HT 3~ 462

Technical specification



Motor - General

Motor number N3153.185 21-18-4AA-W 20hp	Phases 3~	Rated speed 1755 rpm	Rated power 20 hp
ATEX approved No	Number of poles 4	Rated current 26 A	Stator variant 5
Frequency 60 Hz	Rated voltage 460 V	Insulation class H	Type of Duty S1
Version code 185			

Motor - Technical

Power factor - 1/1 Load 0.83	Motor efficiency - 1/1 Load 87.5 %	Total moment of inertia 2.38 lb ft ²	Starts per hour max. 30
Power factor - 3/4 Load 0.77	Motor efficiency - 3/4 Load 89.0 %	Starting current, direct starting 148 A	
Power factor - 1/2 Load 0.66	Motor efficiency - 1/2 Load 89.0 %	Starting current, star-delta 49.3 A	

Project Xylect-20620257
Block

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Created on 9/16/2024 **Last update** 9/16/2024

NP 3153 HT 3~ 462

Performance curve

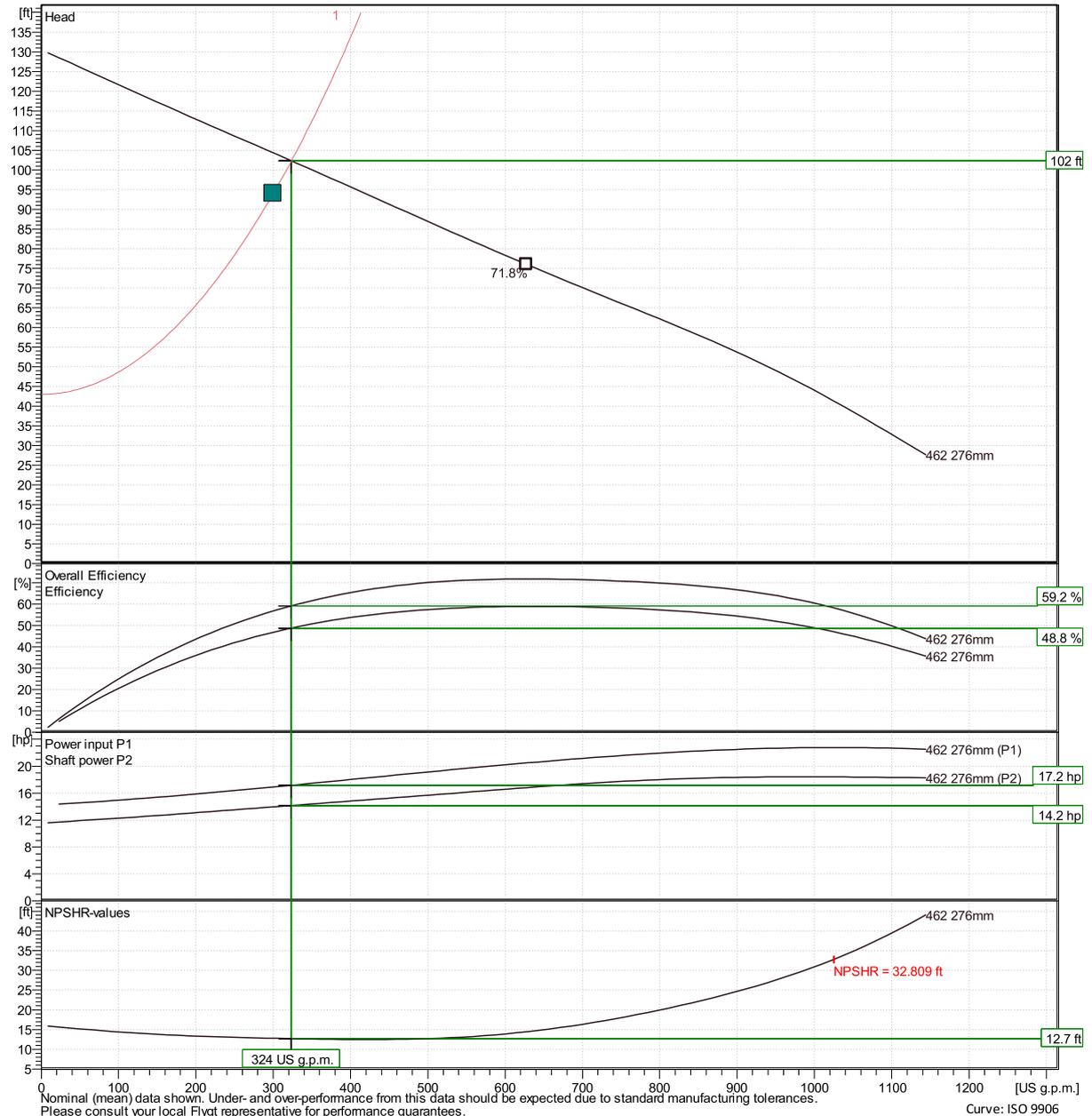


Duty point

Flow
324 US g.p.m.

Head
102 ft

Curves according to: Water, pure Water, pure [100%], 39.2 °F, 62.42 lb/ft³, 1.6891E-5 ft²/s



Nominal (mean) data shown. Under- and over-performance from this data should be expected due to standard manufacturing tolerances. Please consult your local Flygt representative for performance guarantees. Curve: ISO 9906

Xylect-20620257

Dan Joyce

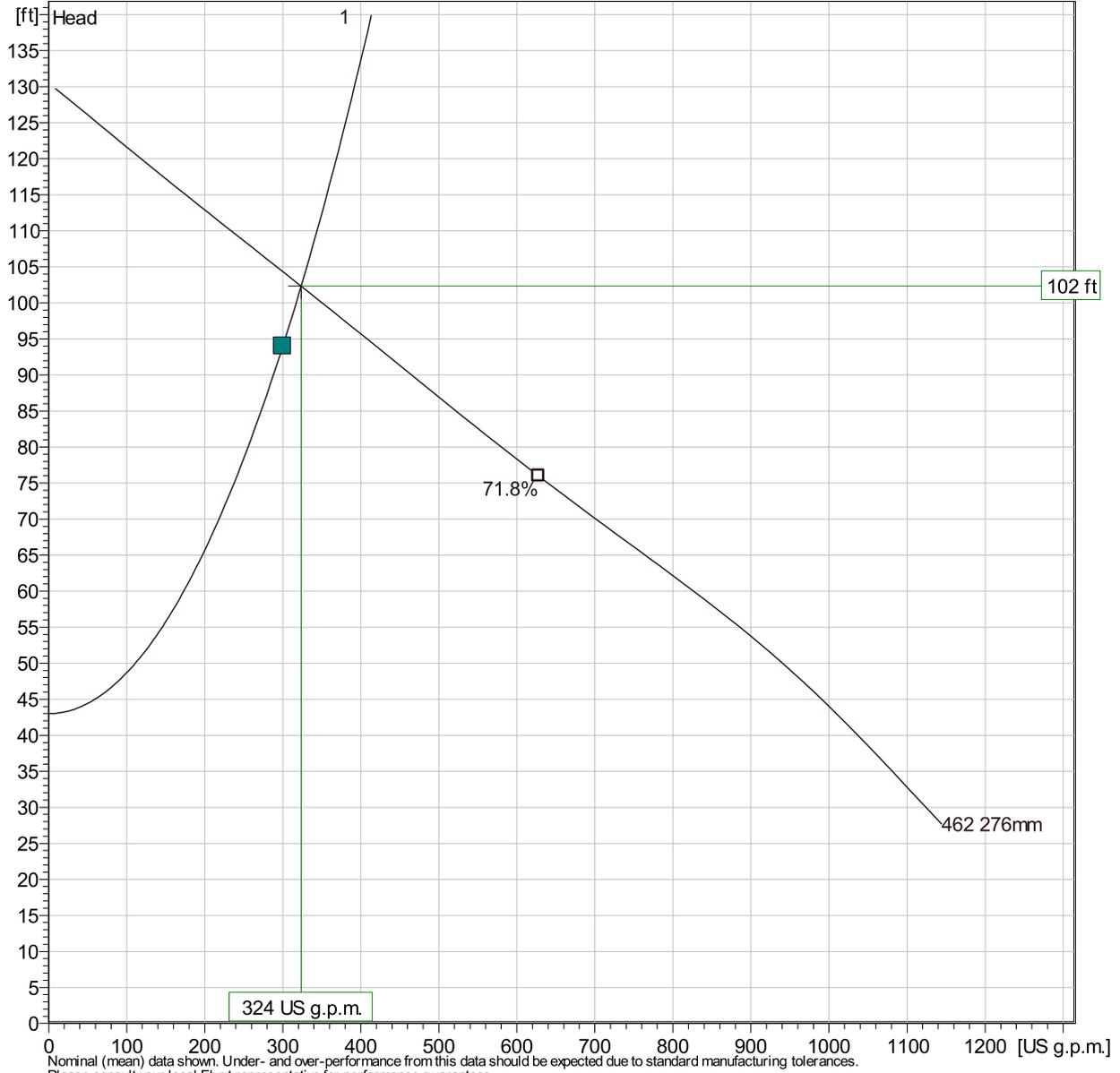
Created on 9/16/2024 Last update 9/16/2024

NP 3153 HT 3~ 462

Duty Analysis



Curves according to: Water, pure [100%]; 39.2°F; 62.42lb/ft³; 1.6891E-5ft²/s



Operating characteristics

Pumps / Systems	Flow	Head	Shaft power	Flow	Head	Shaft power	Hydr.eff.	Spec. Energy	NPSHre
	US g.p.m.	ft	hp	US g.p.m.	ft	hp		kWh/US MG	
1	324	102	14.2	324	102	14.2	59.2 %	660	12.7

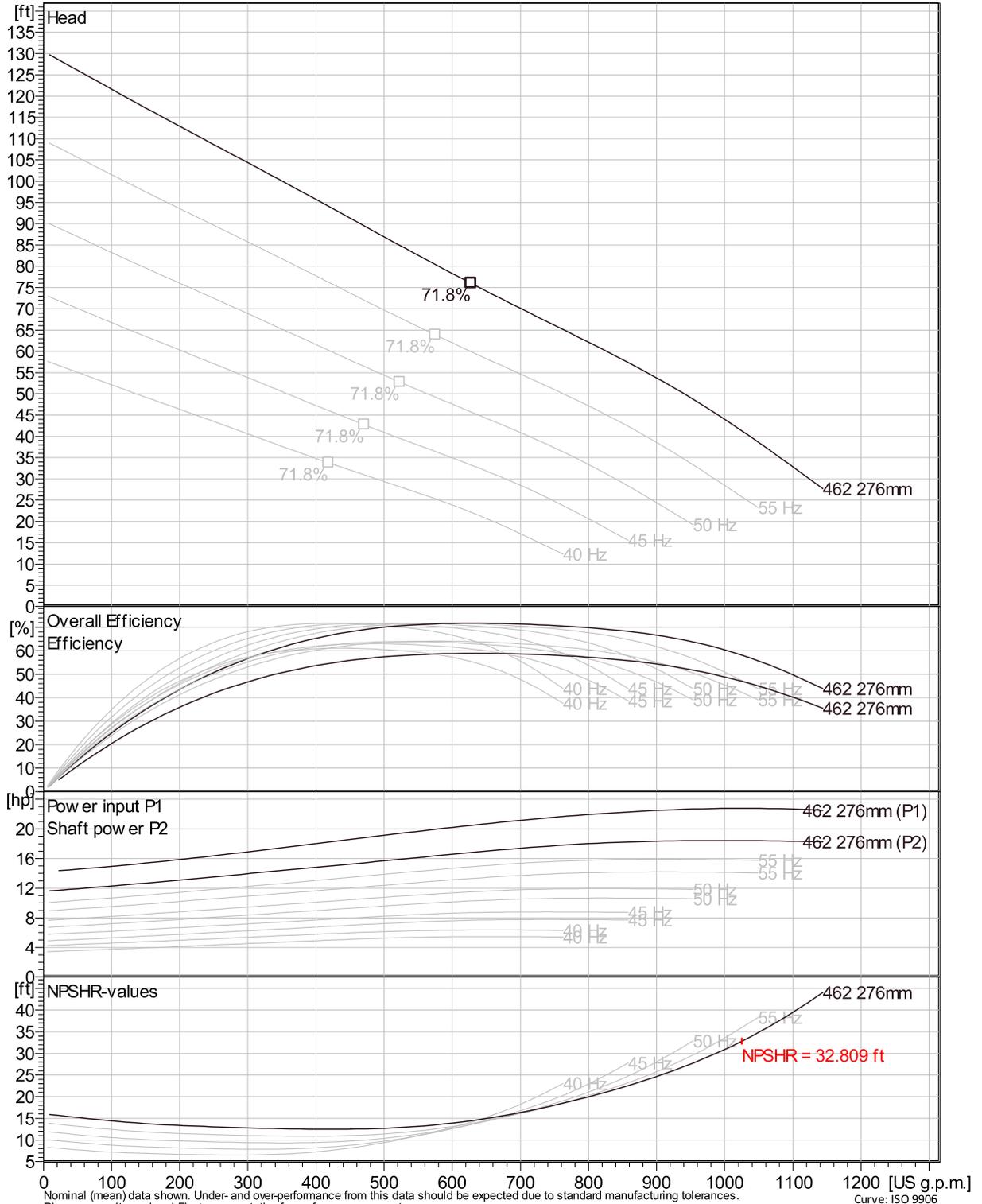
Project		Created by	Dan Joyce	
Block	Xylect-20620257	Created on	9/16/2024	Last update 9/16/2024

NP 3153 HT 3~ 462

VFD Curve



Curves according to: Water, pure, 39.2 °F, 62.42 lb/ft³, 1.6891E-5 ft²/s



Nominal (mean) data shown. Under- and over-performance from this data should be expected due to standard manufacturing tolerances. Please consult your local Flygt representative for performance guarantees.

Curve: ISO 9906

Project Xylect-20620257
Block

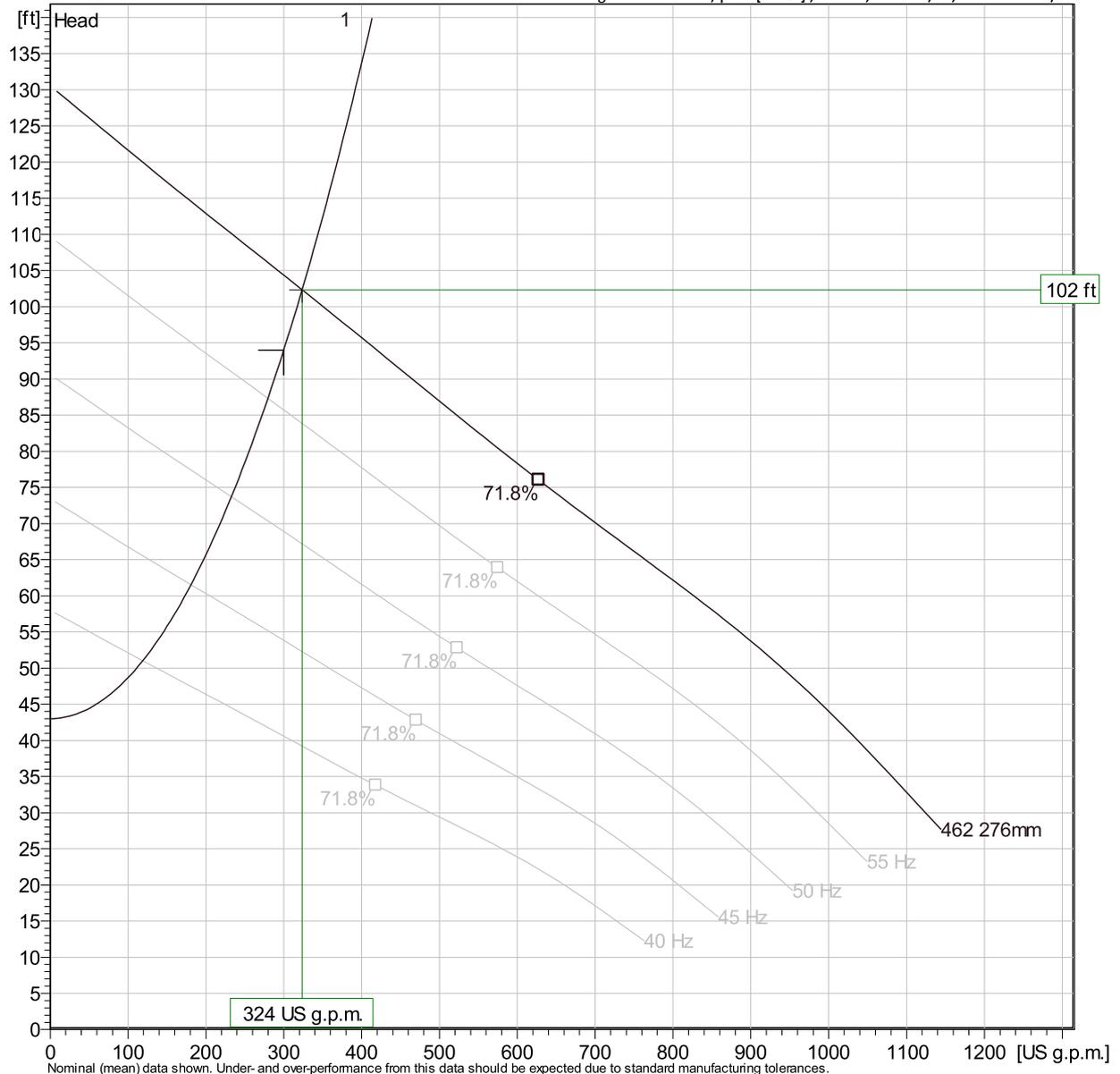
Created by Dan Joyce
Created on 9/16/2024 Last update 9/16/2024

NP 3153 HT 3~ 462

VFD Analysis



Curves according to: Water, pure [100%] ; 39.2°F; 62.42lb/ft³; 1.6891E-5ft²/s



Nominal (mean) data shown. Under- and over-performance from this data should be expected due to standard manufacturing tolerances. Please consult your local Flygt representative for performance guarantees.

Operating Characteristics

Pumps / Systems	Frequency	Flow	Head	Shaft power	Flow	Head	Shaft power	Hydr. eff.	Specific energy	NPSH _{re}
		US g.p.m.	ft	hp	US g.p.m.	ft	hp		kWh/US MG	
1	60 Hz	324	102	14.2	324	102	14.2	59.2 %	660	12.7
1	55 Hz	280	87.3	10.8	280	87.3	10.8	57.3 %	537	11.1
1	50 Hz	233	73.7	7.97	233	73.7	7.97	54.4 %	481	9.63
1	45 Hz	181	61.5	5.68	181	61.5	5.68	49.6 %	452	8.26

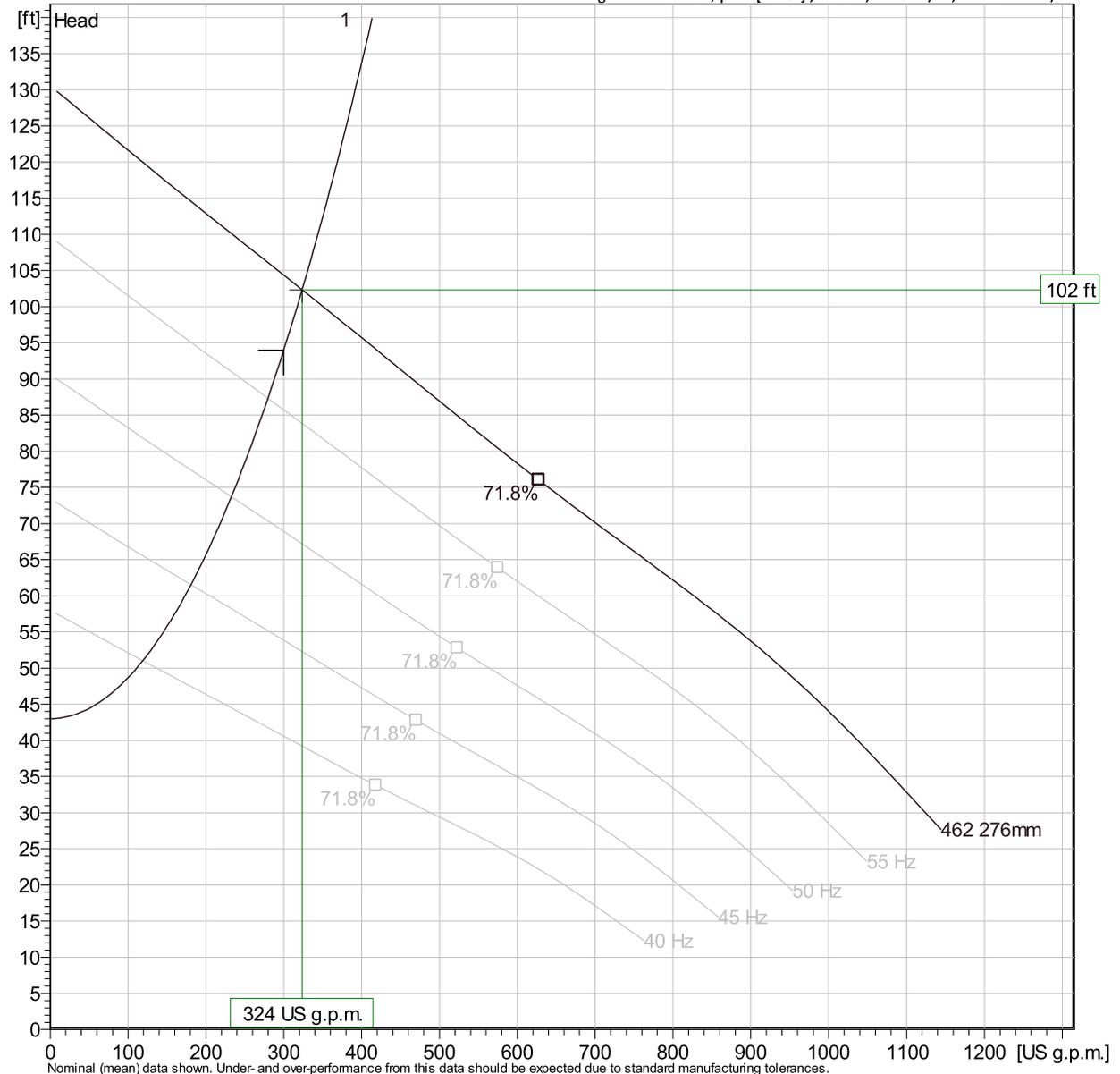
Project	Xylect-20620257	Created by	Dan Joyce
Block		Created on	9/16/2024
		Last update	9/16/2024

NP 3153 HT 3~ 462

VFD Analysis



Curves according to: Water, pure [100%]; 39.2°F; 62.42lb/ft³; 1.6891E-5ft²/s



Nominal (mean) data shown. Under- and over-performance from this data should be expected due to standard manufacturing tolerances. Please consult your local Flygt representative for performance guarantees.

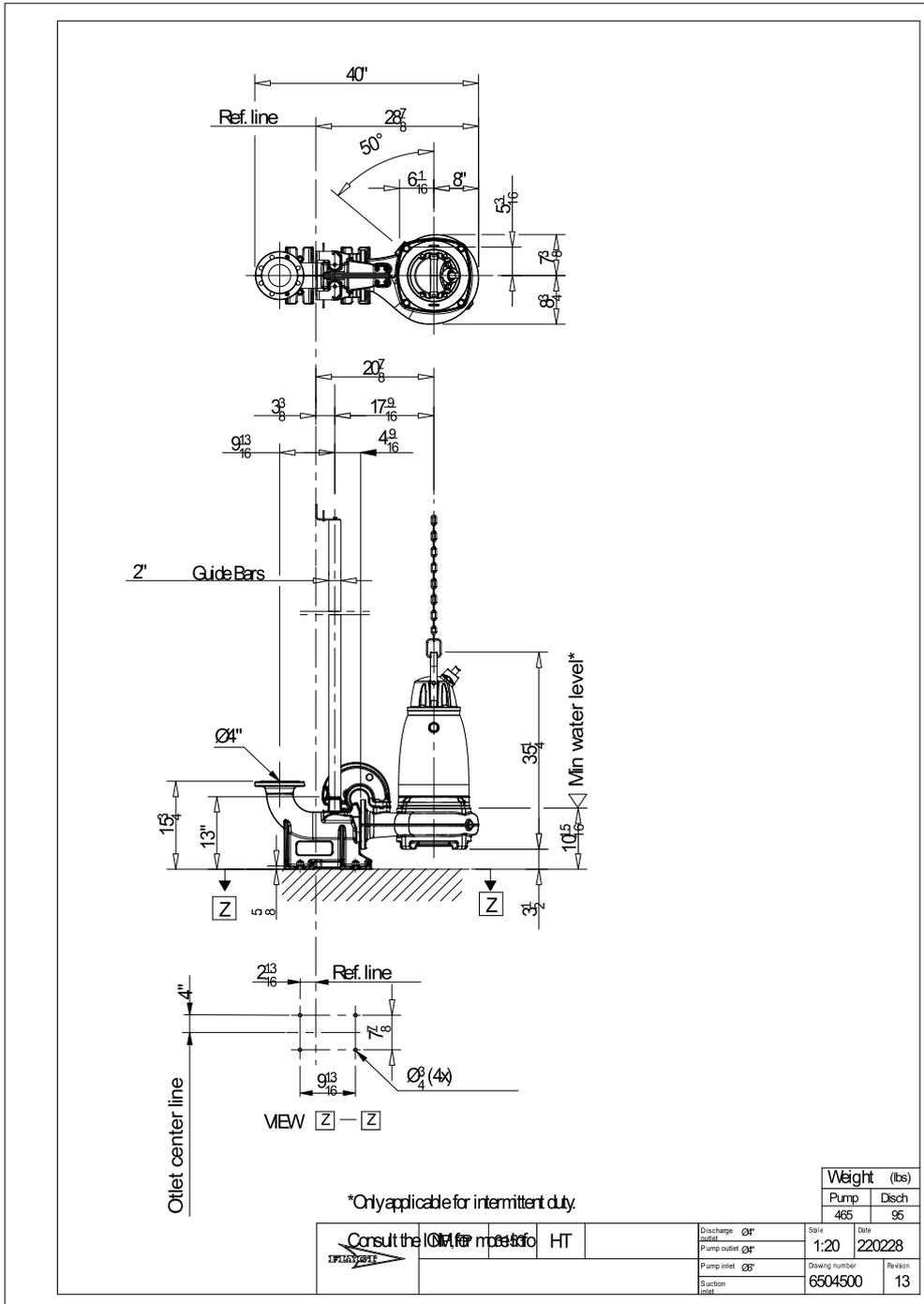
Operating Characteristics

Pumps / Systems	Frequency	Flow	Head	Shaft power	Flow	Head	Shaft power	Hydr. eff.	Specific energy	NPSH _{re}
		US g.p.m.	ft	hp	US g.p.m.	ft	hp			
1	40 Hz	119	51	3.83	119	51	3.83	40.1 %	487	7.07

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		Last update	9/16/2024

NP 3153 HT 3~ 462

Dimensional drawing

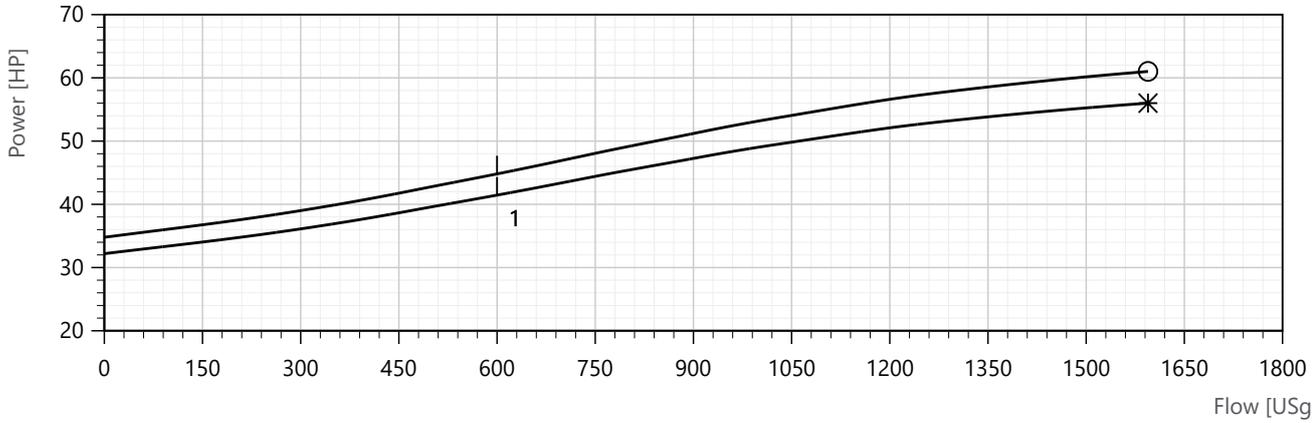


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Block		Created on	9/16/2024
		Last update	9/16/2024

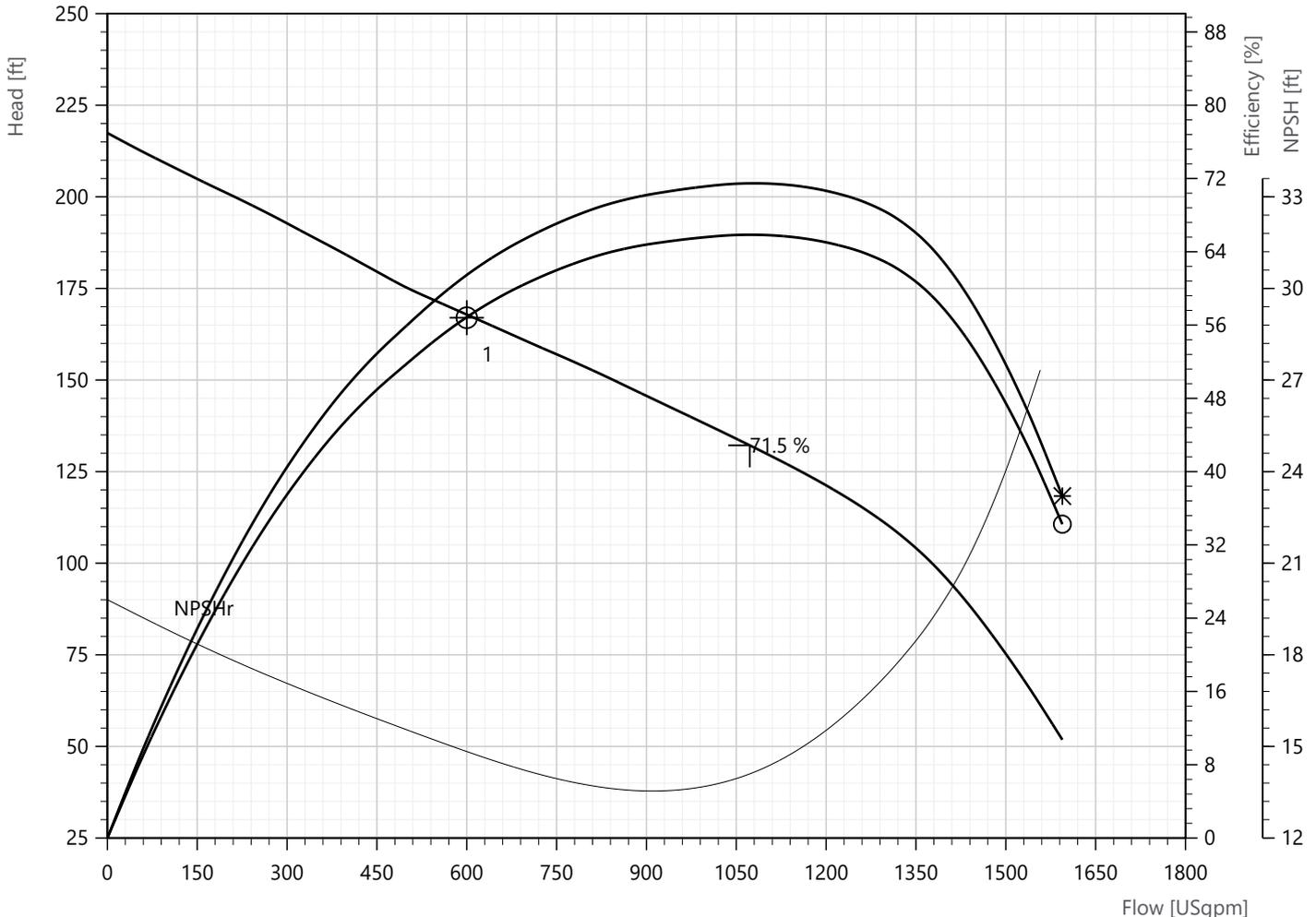


PERFORMANCE CURVE

DATE 2024-09-16		REPORT Fieldstone PS				ISSUE 17		PRODUCT NP3202.185 HT	
NUMBER OF BLADES 2		TOTAL MOMENT OF INERTIA 10 lbft ²		RATED SPEED 1770 RPM		POLES 4 PHASES 3 FREQUENCY 60 Hz		IMPELLER DIAMETER 344 mm	
MOTOR COS PHI 0.91		1/1-RATED POWER 0.91		3/4-RATED POWER 0.88		1/2-RATED POWER 0.82		RATED CURRENT 68 A	
MOTOR EFFICIENCY 91.5 %		91.5 %		92.4 %		92.5 %		STARTING CURRENT 425 A	
						STARTING TORQUE 320 Nm		MAX TORQUE 650 Nm	
								MOTOR TYPE / STATOR 30-24-4AA/01	
								MOTOR ISSUE 11	
								DUTY CLASS S1	



Duty points	Flow [USgpm]	Head [ft]	Power [HP]	Efficiency [%]	NPSHr [ft]	Standard	Guarantee (-> no guarantee)
1	600	167	(44.8) (41.5)	(56.9) (61.5)	(14.8)	HI 14.6-2022	2B QH Guarantee



NOTE:
 CURVES SHOW PERFORMANCE WITH CLEAR COLD WATER
 * : PUMP EFFICIENCY / SHAFT POWER
 O : OVERALL EFFICIENCY / INPUT POWER
 NPSHR = NPSH3 + MARGIN
 NO OPERATION ALONG DASHED CURVE.

AUTHOR:
 DAN JOYCE

APPENDIX 16 - ALTERNATIVE 2 LIFE CYCLE COST ANALYSIS

Life Cycle Cost Analysis
Southgate Mixed Use
Alternative 2 - Off-Site Gravity Sewer Connection to Porter Ridge Pump Station
New Gravity Sanitary Sewer Line

Inputs and Assumptions

Planning Period	20	Years	O&M Costs (% of Capital for Gravity Systems)	1%
Discount Rate	1.55%		10-year Items (% of Total for Gravity Systems)	5%
Inflation Rate	3.20%		20-year Items (% of Total for Gravity Systems)	0%
			50-year Items (% of Total for Gravity Systems)	95%

Initial Capital Investment

Item	Quantity	UOM	Cost Per Unit	Cost
8" PVC Gravity Sanitary Sewer Line	7100	LF	\$80	\$568,000
Manholes	23	EA	\$5,000	\$115,000
Clearing & Grubbing	10	AC	\$7,500	\$75,000
Temporary Construction Easement Acquisition	10	AC	\$50,000	\$500,000
Sanitary Sewer Easement Acquisition	5	AC	\$100,000	\$500,000
Total				\$1,758,000

Annual Costs

Yearly Cost of Gravity System O&M	\$6,830
Total Annual Costs NPV	\$157,450

Life-Cycle Replacement Costs

Cost of 10-Year Items at Year 0	\$34,150
Cost of 10-Year Items at Year 10	\$46,794
NPV of 10-Year Items at Year 10	\$40,123
Cost of 10-Year Items at Year 20	\$64,119
NPV of 10-Year Items at Year 20	\$47,140
Cost 20-Year Items at Year 0	\$0
Cost of 20-Year Items at Year 20	\$0
NPV of 20-Year Items at Year 20	\$0
Total Life-Cycle Replacement Costs NPV	\$87,262

Residual Values

Cost of 10-Year Items at Year 20	\$64,119
Cost of 20-Year Items at Year 20	\$0
Residual Value of 50-Year Items at Year 20	\$389,310
Total Life-Cycle Replacement Residual Value at Year 20	\$453,429
Total Residual Value NPV	\$333,358

Total Net Present Value	\$1,669,354.47
--------------------------------	-----------------------

Life Cycle Cost Analysis
Southgate Mixed Use
Alternative 2 - Off-Site Gravity Sewer Connection to Porter Ridge Pump Station
Porter Ridge Pump Station Upgrades

Inputs and Assumptions

Planning Period	20	Years	O&M Costs (% of Capital for Pump Stations)	3%
Discount Rate	1.55%		10-year Items (% of Total for Pump Stations)	5%
Inflation	3.20%		20-year Items (% of Total for Pump Stations)	60%
			50-year Items (% of Total for Pump Stations)	35%

Initial Capital Investment

Item	Quantity	UOM	Cost Per Unit	Cost
Porter Ridge PS Upgrades	1	LS	\$430,000	\$430,000
			Total	\$430,000

Annual Costs

Electrical Cost	\$0.08	kWH
Porter Ridge PS - Flygt NP 3153 HT 3~ 462		
Pump On Time Per Cycle (min)	9.29	
Pump Cycles Per Hour	6.46	
Ave Daily Flow Rate (GPM)	105.26	
US MG / Year	55.34	
Pump Spec Energy (kWh/US MG)	660	
Yearly Cost of Electricity	\$2,921.79	
Yearly Cost of Pump Station O&M	\$12,900.00	
Total Yearly Costs at Year 0	\$15,821.79	
Total Annual Costs NPV	\$364,735.14	

Life-Cycle Capital Replacement Costs

Cost 10-Year Items at Year 0	\$21,500.00
Cost 10-Year Items at Year 10	\$29,460
NPV of 10-Year Items at Year 10	\$25,260.16
Cost 10-Year Items at Year 20	\$40,367.55
NPV of 10-Year Items at Year 20	\$29,677.95
Cost 20-Year Items at Year 0	\$258,000.00
Cost 20-Year Items at Year 20	\$484,410.62
NPV of 20-Year Items at Year 20	\$356,135.36
Total Replacement Costs NPV	\$411,073.47

Residual Values

Cost 10-Year Items at Year 20	\$40,368
Cost 20-Year Items at Year 20	\$484,411
Residual Value of 50-Year Items at Year 20	\$90,300
Total Life-Cycle Replacement Residual Value at Year 20	\$615,078
Total Residual Value NPV	\$452,201

Total Net Present Value

\$753,607.36

Life Cycle Cost Analysis
Southgate Mixed Use
Alternative 2 - Off-Site Gravity Sewer Connection to Porter Ridge Pump Station
Fieldstone Pump Station Upgrades

Inputs and Assumptions

Planning Period	20	Years	O&M Costs (% of Capital for Pump Stations)	3%
Discount Rate	1.55%		10-year Items (% of Total for Pump Stations)	5%
Inflation	3.20%		20-year Items (% of Total for Pump Stations)	60%
			50-year Items (% of Total for Pump Stations)	35%

Initial Capital Investment

Item	Quantity	UOM	Cost Per Unit	Cost
Fieldstone PS Upgrades	1	LS	\$642,000	\$642,000
			Total	\$642,000

Annual Costs

Electrical Cost	\$0.08	KWH
Fieldstone PS - Flygt NP 3202.185 HT		
Pump On Time Per Cycle (min)	10.64	
Pump Cycles Per Hour	5.64	
Ave Daily Flow Rate (GPM)	215.31	
US MG / Year	113.19	
Pump Spec Energy (kWh/US MG)	660	
Yearly Cost of Electricity	\$5,976.17	
Yearly Cost of Pump Station O&M	\$19,260.00	
Total Yearly Costs at Year 0	\$25,236.17	
Total Annual Costs NPV	\$581,761.96	

Life-Cycle Capital Replacement Costs

Cost 10-Year Items at Year 0	\$32,100.00
Cost 10-Year Items at Year 10	\$43,985
NPV of 10-Year Items at Year 10	\$37,714.01
Cost 10-Year Items at Year 20	\$60,269.69
NPV of 10-Year Items at Year 20	\$44,309.86
Cost 20-Year Items at Year 0	\$385,200.00
Cost 20-Year Items at Year 20	\$723,236.31
NPV of 20-Year Items at Year 20	\$531,718.38
Total Replacement Costs NPV	\$613,742.25

Residual Values

Cost 10-Year Items at Year 20	\$60,270
Cost 20-Year Items at Year 20	\$723,236
Residual Value of 50-Year Items at Year 20	\$134,820
Total Life-Cycle Replacement Residual Value at Year 20	\$918,326
Total Residual Value NPV	\$675,147

Total Net Present Value

\$1,162,357.23

**Motions and Rationale Statements Concerning Proposed Wastewater Pump Station
Application Request – Sanctuary at Southgate Phase II**

TO APPROVE THE PUMP STATION APPLICATION REQUEST

Motion

(i) Approve the application request concerning the Sanctuary at Southgate Phase II development for a new wastewater pump station, as such pump station solution is set forth in the application associated with the request, in accordance with Section 34-336(b)(1) of the Union County Code; and (ii) adopt the utility-based rationale statement for approval.

Utility Based Rationale Statement

In managing Union County’s water and wastewater utility, it is the responsibility of the Union County Board of Commissioners (the “Board”) to determine the particular needs of the utility at the current time in making decisions concerning the utility. The Board should take into account and weigh numerous operational, financial, and other utility-based reasons to make decisions which the Board determines are reasonable, in the public interest, and rationally based on the best interest of the operation of the utility. Pursuant to Section 34-336(b)(1) of the Union County Code, the Board does hereby find and determine that approval of the new pump station application request is reasonable, in the public interest, and is rationally based on the best interest of the operation of the utility, based upon following utility-based rationale:

1. Construction of the requested solution will result in a new pump station, which should be maintained with less likelihood for the need for major rehabilitation or replacement projects in the near future; whereas, a gravity line directly serving this property without a new pump station would require capacity improvements at two older, existing pump stations. Thus, the requested solution requires only one new pump station and does not require improvements to multiple existing, costlier to maintain, pump stations.
2. The projected life cycle costs for the new pump station solution are less than the projected life cycle costs for an alternative solution involving a gravity line with improvements to two existing pump stations (before considering any contribution to reduce costs).
3. The proposed development is ultimately served by the same larger pump station (Poplin Road) and treatment plant (12-Mile Creek) as a potential alternative for public sewer service.

TO DENY THE PUMP STATION APPLICATION REQUEST

Motion

(i) Deny the application request concerning the Sanctuary at Southgate Phase II development for a new wastewater pump station, as such pump station solution is set forth in the application associated with the request, in accordance with Section 34-336(b)(1) of the Union County Code; and (ii) adopt the utility-based rationale statement for denial.

Utility-Based Rationale Statement

In managing Union County's water and wastewater utility, it is the responsibility of the Union County Board of Commissioners (the "Board") to determine the particular needs of the utility at the current time in making decisions concerning the utility. The Board should take into account and weigh numerous operational, financial, and other utility-based reasons to make decisions which the Board determines are reasonable, in the public interest, and rationally based on the best interest of the operation of the utility. Pursuant to Section 34-336(b)(1) of the Union County Code, the Board does hereby find and determine that denial of the new pump station application request is reasonable, in the public interest, and is rationally based on the best interest of the operation of the utility, based upon following utility-based rationale:

1. The new pump station solution will require significant investment over time in a pump station, as well as any future replacements, which primarily serves one development, without the opportunity for significant revenue from other customer connections which would assist in offsetting such long-term costs.
2. Compared to a solution with improvements to two additional pump stations, the new pump station solution does not allow for as many improvements that would benefit the entire utility system.