

Union County, NC

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



Meeting Agenda

Monday, November 17, 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**25-714****Closed Session****INFORMATION CONTACT:**

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

ACTION REQUESTED:

Enter into Closed Session pursuant to NCGS 143-318.11.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

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

FINANCIAL IMPACT:

None.

Opening of Meeting - 6:00 PM

Invocation - Commissioner Clancy Baucom

Pledge of Allegiance

Informal Comments**Public Hearing(s)****25-685****Public Hearing - Rezoning Petition CZ-2025-005 Secrest****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 case is requesting a revision of the Union County Zoning Map by rezoning one parcel totaling 11.958 acres outside of road right of way appearing on the tax map as tax parcel 07-042-002A along Secrest Short Cut Road from R-20 to B-4 with Conditions. The flea market incorporated a special use permit approval as part of this rezoning. The rezoning will include the following conditions:

- 1) Limited to site plan dated August 17, 2025

- 2) Uses limited to flea market and driving school
- 3) Owner will construct improvements to Secrest Short Cut as required by NCDOT
- 4) Five-year vesting of development rights
- 5) Development will meet all requirements of the Union County Unified Development Ordinance as of the date of approval

The Land Use Board evaluated this proposal at its October 21 meeting and recommended denial on a 5-1 vote, noting flood and noise concerns. One member of the public spoke and expressed concern over noise and traffic impacts.

If the Board of Commissioners wishes to make a decision on this rezoning, it may 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-2024-005 from Karmyne Milton; and (ii) adopt the consistency and reasonableness statement for denial.

FINANCIAL IMPACT:

None.

25-686

Public Hearing - Rezoning Petition RZ-2025-010 Haney

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 case is requesting to rezone one parcel totaling 0.51 acres appearing on the tax map as tax parcel 091-31-001 located on Pageland Highway from RA-40 to HC (Highway Corridor). The rezoning request is a "straight" rezoning, so there are no conditions associated with this request.

The Land Use Board evaluated this proposal at its October 21 meeting and recommended approval on a 5-1 vote, citing consistency with the land use map.

If the Board of Commissioners wishes to make a decision on the rezoning petition, it can consider the following motions.

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

Motion

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

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

Motion

- (i) Deny rezoning petition RZ-2025-010 from Mike Haney; and (ii) adopt the consistency and reasonableness statement for denial.

FINANCIAL IMPACT:

None.

25-692

Public Hearing - Union County Rural Land Use Plan and Land Use Map Amendments

INFORMATION CONTACT:

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

ACTION REQUESTED:

Conduct public hearing for plan adoption and Land Use Map amendments.

PRIOR BOARD ACTIONS:

- 1) May 6, 2024, Regular Meeting, Agenda Item # 24-289 - Authorize staff to apply for Green Growth Toolkit grant.
- 2) March 17, 2025, Regular Meeting, Agenda Item # 25-071 - Receive update on vision statement.
- 3) August 11, 2025, Regular Meeting, Agenda Item #25-483 - Receive update on draft strategies

BACKGROUND:

The steering committee has completed its work in developing a land use plan for the rural parts of Union County. The draft report summarizes the work of the committee, including its strategy recommendations, which are below:

- Expand agricultural easement purchase program
- Require contiguous areas for open space in major subdivisions
- Express concern over impacts from bypasses
- Limit major subdivisions in certain zoning districts
- Expand rural area in Land Use Map
- Add six rural centers to the Land Use Map
- Flexibility for commercial uses in rural areas
- Provide options for smaller developments impacted by open space requirements
- Create a conservation development brochure

The Soil and Water Conservation District and Land Use Board both reviewed and recommend the plan as submitted.

A total of two comments have been received from the public. Both noted concern over impacts of growth and transportation projects on rural character and agriculture.

FINANCIAL IMPACT:

There are no impacts from the plan adoption.

Staff Recognition

25-717

Proclamation - Remembering Charles “Chic” Richardson

INFORMATION CONTACT:

Chair Melissa Merrell, Board of County Commissioners

ACTION REQUESTED:

Adopt proclamation remembering Charles “Chic” Richardson.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This Proclamation recognizes and honors Charles “Chic” J. Richardson for his dedication and service to his country. Mr. Richardson served in the United States Army Air Force during World War II as a B-17 bomber crewman. Mr. Richardson passed away on November 3, 2025, at the age of 102.

FINANCIAL IMPACT:

None.

Consent Agenda

25-693

Contract - Catawba River Water Treatment Plant Expansion - Preliminary Engineering Report

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Water Capital Improvement Program (CIP) includes an allocation for the design and construction of an expansion of the Catawba River Water Treatment Plant to 56 MGD with all costs being shared 50%

each with Lancaster County Water and Sewer District. The preliminary engineering report (PER) will review the condition of the existing plant, evaluate alternatives for current and future facility expansion, develop and execute PFAS pilot testing for treatment options, and analyze algae treatment methods in the raw water reservoir to continue to manage water quality related to taste and odor.

Weston & Sampson Engineers has been selected to provide engineering services for Task Order 2025-1: Catawba River Water Treatment Plant Expansion Preliminary Engineering Report. Weston & Sampson Engineers was chosen from RFQ - Professional Services for CRWTP Expansion solicited by the joint venture of Union County and Lancaster County Water and Sewer District.

FINANCIAL IMPACT:

The total cost of the Task Order 2025-1 with Weston & Sampson Engineers is \$382,523.00. This total task order amount will be shared equally between Union County and Lancaster County Water and Sewer District, with Union County's financial responsibility being \$191,261.50. Sufficient funds are available within the adopted capital account 60184523 - CRWTP Expansion.

25-698

Bid Award - Waxhaw North Sanitary Sewer Replacement & Rehabilitation

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Adopt Resolution for Tentative Award of the Waxhaw North Sanitary Sewer Replacement & Rehabilitation project construction, 2) contingent upon North Carolina Department of Environmental Quality's issuance of the Authority to Award, award contract to North American Pipeline Management, LLC in the amount of \$3,138,610.00; 3) 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; and 4) adopt Resolution Providing Notice of Construction of the Waxhaw North Sanitary Sewer Replacement & Rehabilitation project.

PRIOR BOARD ACTIONS:

- 1) March 1, 2021, Regular Meeting, Agenda Item #4 - Approved WK Dickson Task Order 2021-01 for engineering field assessment and preliminary design services for the project in an amount of \$104,850.00.
- 2) March 20, 2023, Regular Meeting, Agenda Item #23-057 - Approved WK Dickson Task Order 2021-09 for final design, permitting, and bidding services in an amount of \$135,509.00.
- 3) August 12, 2024, Regular Meeting, Agenda Item #24-530 - Adopted

resolution accepting Appropriations Act (S.L. 2023-134) funding in the amount of \$1,477,500.00 from the North Carolina Department of Environmental Quality Division of Water Infrastructure and authorized the County Manager to execute all necessary documentation related to the acceptance.

BACKGROUND:

The Capital Improvement Plan (CIP) includes an annual allocation in the Wastewater Rehabilitation & Replacement Program to assess, prioritize, and rehabilitate/replace sanitary sewer collection system infrastructure. This project is Year 1 of a two-year rehabilitation project to replace the aged Septic Tank Effluent Gravity (STEG) wastewater collection system in Waxhaw. This Year 1 project consists of the replacement of approximately 4,500 linear feet of 4-inch and 6-inch sewer lines with 8-inch and 10-inch sewer mains in the Waxhaw downtown area on the north side of Highway 75.

On August 21, 2025, the Procurement Department partnered with Union County Water (UCW) to issue an Invitation for Bid IFB 2024-083 Waxhaw North Sanitary Sewer Replacement & Rehabilitation project. On October 2, 2025, two (2) bids for the title project were received. Since fewer than three (3) bids were received, the submitted bids were returned to the bidders unopened.

On October 3, 2025, the Procurement Department partnered with Union County Water to re-issue an Invitation for Bid IFB 2024-083 (Rebid) Waxhaw North Sanitary Sewer Replacement & Rehabilitation project. On October 14, 2025, one (1) bid for the title project was received and processed. All bids were tabulated, reviewed and certified by Ardurra (previously WK Dickson). The single bid was in the amount of \$3,138,610.00; staff recommends that the project be awarded to the lowest, responsive, responsible bidder, North American Pipeline Management, LLC, in the amount of \$3,138,610.00.

FINANCIAL IMPACT:

Funding is available within the adopted capital account 60185522 - STEG Assessment Waxhaw to support the construction contract amount of \$3,138,610.00.

25-701

Contract Amendment - GIS Managed Services

INFORMATION CONTACT:

Luke Fawcett, Union County Water, Planning & Resource Management
Assistant Director, 704-296-4237

ACTION REQUESTED:

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

January 6, 2025, Regular Meeting, Agenda Item #24-879 - Contract Amendment - GIS Managed Services

BACKGROUND:

GIS Managed Services refers to the cloud-hosted, vendor-supported infrastructure used to power Union County Water's geospatial systems and tools. In December 2021, Union County first partnered with ROK Technologies to provide a managed ArcGIS Enterprise environment hosted in AWS. This decision was driven by the increasing demands on GIS infrastructure and the growing role of geospatial data in utility operations.

This amendment is required to extend and update the cost increase by \$5,952 for the AWS cloud services that Rok Technologies manages for Union County.

Rok Technologies manages to cloud services that support Union County Water's operational web maps, work applications, data warehousing, integrations, and analytical functions.

FINANCIAL IMPACT:

The pricing for the Services for the Extended Term of one year is \$163,872.00 which will be funded by Union County Water enterprise fund. Funding is available within approved FY26 operating budget.

25-629**Budget Amendment - Funding to Build and Support Enhanced Community-Based Health Care Delivery to Improve the Health and Quality of Life for All North Carolinians****INFORMATION CONTACT:**

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

ACTION REQUESTED:

1) Recognize, receive, and appropriate \$23,316.80 in Bringing Home Value Innovation Funding from Community Care of North Carolina and 2) Approve Budget Amendment #11.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Community Care of North Carolina (CCNC) has awarded Bringing Value Home Innovation Funding to Union County Public Health. This is a one-time grant in the amount of \$23,316.80. The payment represents approximately \$16.70 per member calculated using your March 2025 Medicaid Standard Plan Prepaid Health Plan (PHP) attribution of 1,396 as reported to CCNC in the Beneficiary files from each PHP. As attribution rates vary from month to month, the Innovation Funding grants were calculated using March 2025 attribution data - for consistency and accuracy.

The purpose of this grant is to assist practices in identifying and executing plans that support CCNC's charitable mission to build and support

enhanced community-based health care delivery systems to improve the health and quality of life for all North Carolinians. To remain consistent with this mission and CCNC's tax-exempt status, acceptable uses for these funds include, but are not limited to:

- Expanding access to care by offering open access scheduling
- Developing practice-based solutions to reduce unnecessary ED and Inpatient Utilization
- Improving quality performance, particularly for targeted Medicaid PHP Quality Measures
- Employing new ways to engage unengaged patients
- Implementing Practice Innovations that align with CCNC's mission

Grant funds may not be used for lobbying or partisan political activities.

FINANCIAL IMPACT:

The County is awarded \$23,316.80 from Community Care of North Carolina. No County match is required.

25-677

Special Revenue Ordinance Amendment - Appropriate Additional ARPA Temporary Savings Fund for Public Health Services

INFORMATION CONTACT:

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

ACTION REQUESTED:

- 1) Recognize, receive, and appropriate \$50,000 in additional funding from the North Carolina Division of Public Health, Agreement Addendum, FY 25-26, 121 ARPA Temporary Savings Fund Program for Public Health Services in the Human Services Agency's Public Health Department, and
- 2) approve Special Revenue Ordinance Amendment # 97A.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This funding, provided through budget receipts transferred from the ARPA Temporary Savings fund and made available through the NCGA 2023 Appropriations Act, HB 259, provides a \$50,000 grant in each year of the 2023-2025 fiscal biennium to each local health department to support activities authorized under the General Aid-to-Counties Agreement Addendum including the delivery of the 10 Essential Public Health Services per GS § 130A-1.1.1, the core functions of public health (Assessment, Policy Development, Assurance), and the specific health needs or health status indicators selected by each local health department.

Per HB 259, Section 4.7.(i), "The funds appropriated from the State Fiscal Recovery Fund in this act and in prior enactments of the General Assembly shall not revert at the end of each fiscal year of the 20232025 fiscal biennium but shall remain available to expend and appropriate until

the date set by applicable federal law or guidance.”

This Agreement Addendum for Activity 121 further enhances the ability of local health departments to deliver the essential services and core functions of public health to address the specific health needs or health status indicators selected by the local health department.

The North Carolina General Statute § 130A-1.1(b) states: a local health department shall ensure that the following 10 Essential Public Health Services are available and accessible to the population in each county served by the local health department:

Assessment:

1. Monitor health status to identify community health problems.
2. Diagnose and investigate health problems and health hazards in the community.

Policy Development:

3. Inform, educate, and empower people about health issues.
4. Mobilize community partnerships to identify and solve health problems.
5. Develop policies and plans that support individual and community health efforts.

Assurance:

6. Enforce laws and regulations that protect health and ensure safety.
7. Link people to needed personal health services and assure the provision of health care when otherwise unavailable.
8. Assure a competent public health and personal health care workforce.
9. Evaluate effectiveness, accessibility, and quality of personal and population-based health services.
10. Research for new insights and innovative solutions to health problems.

FINANCIAL IMPACT:

Federal grant funding in the amount of \$50,000 is awarded through the North Carolina Division of Public Health Agreement Addendum, FY 25-26, 121 ARPA Temporary Savings Funds for Public Health Services. No County match is required.

25-688

Grant Application - Dental Clinic

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

grant and budget funds as appropriate.

PRIOR BOARD ACTIONS:

- 1) November 7, 2022, Regular Meeting, Agenda Item #22-751 - Approved Delta Dental Foundation grant application.
- 2) December 4, 2023, Regular Meeting, Agenda Item #23-823 - Approved Delta Dental Foundation grant application.
- 3) December 2, 2024, Regular Meeting, Agenda Item #24-815 - Approved Delta Dental Foundation grant application.

BACKGROUND:

The Delta Dental Foundation is accepting applications for grant funding up to \$5,000 to support community dental care for children through their Smiles for Kids Grants Program. The Public Health Dental Clinic requests approval to apply for these funds to support and expand our dental care services for children who have financial challenges receiving the necessary care. We anticipate 25-30 children can be served through this funding.

The County's Dental Clinic provides general dentistry services and education to residents who may have difficulty obtaining dental care due to financial needs or access to other providers. The clinic provides services for adults and children beginning at 1 year of age. The clinic accepts Medicaid, third-party insurance and private pay on a sliding fee scale based on income.

Oral diseases, which range from cavities and gum disease to oral cancer, cause pain and disability for many in our community. Establishing good oral health practices and seeking early dental care is an important component for overall health and is especially important for children to begin routine dental care early in their lives.

A new application is required to be submitted each year to be considered for grant funding.

FINANCIAL IMPACT:

Anticipated funding is \$5,000 with no County match requested or required.

25-689

Budget Amendment - Additional Funding for Conversion to Electronic Test Ordering and Results System

INFORMATION CONTACT:

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

ACTION REQUESTED:

- 1) Recognize, receive, and appropriate \$6,000 in additional funding from the North Carolina Division of Public Health Agreement Addendum FY25-26, 510 General Communicable Disease Control, Revision #1 and
- 2) approve Budget Amendment #10.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

To help better control, detect, and monitor communicable diseases, the North Carolina State Laboratory of Public Health (NCSLPH) is implementing a new system: the Electronic Test Ordering and Results (ETOR) system. Currently, local health departments send thousands of paper test requisition forms to the NCSLPH each week, which results in thousands of paper results being sent back. This manual process is time consuming and inefficient for everyone. To significantly reduce paper and streamline operations, the NCSLPH is phasing in the implementation of the ETOR system. The local health departments' part in the onboarding process will be during the Bidirectional Interface Project. Local health departments will be phased into this process and notified of their timeline by the project manager at the NCSLPH. This project will connect each local health departments' Electronic Health Record (EHR) system directly with the NCSLPH Laboratory Information Management System (LIMS) through the North Carolina Health Information Exchange (NCHIEA). This new bidirectional interface will allow every local health department to place lab test orders with NCSLPH electronically (i.e., paperless) and to receive lab test results automatically back into the local health department's EHR system via the NCHIEA. This change will make test ordering and receipt of results much more efficient, benefiting all local health departments across North Carolina.

FINANCIAL IMPACT:

The County is awarded \$6,000 from the North Carolina Division of Public Health through May 31, 2026. No County match is required.

25-707

Grant Application -Target Circle Community Giving

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None

BACKGROUND:

Union County has been selected to receive funding through Target's Target Circle Community Giving program, in which Target Circle members vote and direct funds toward programs in their communities. Once each voting period concludes, Target allocates grants based on the percentage of votes each organization receives.

Union County's Senior Nutrition Program has been designated to receive

\$3,525.39 in unrestricted funding through this initiative. These funds will be used to support general program operations and enhance services for older adults across Union County. The funding will be used for program needs such as shelf-stable meals, computer equipment for staff, or craft and activity supplies for congregate meal site participants.

FINANCIAL IMPACT:

\$3,525.39 will be awarded with no required match.

25-696

Resolution - Parks & Recreation Bobcat Exchange

INFORMATION CONTACT:

Jim Chaffin, Parks & Recreation, Director, 704-283-3881

ACTION REQUESTED:

Adopt a resolution authorizing the exchange of personal property.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County currently owns a Bobcat S250 skid steer loader purchased in 2005, which is actively used by the Parks & Recreation Department. Due to the machine's age and the rising costs associated with its maintenance, the department is requesting to replace the existing Bobcat with a new 2025 Model S650 T4 skid steer loader.

As part of this replacement process, Parks & Recreation is seeking approval to exchange the current Bobcat S250 pursuant to N.C.G.S. 160A-271. The County will receive the current fair market value of the Bobcat, less the cost of an outstanding work order, as trade-in value for the new Bobcat. This exchange will reduce the overall purchase cost charged to the department's budget. Details regarding the purchase price, trade-in value, and the final net price are included in the attached resolution.

FINANCIAL IMPACT:

The total cost for the new 2025 Model S650 T4 Skid Steer Loader, after applying the trade-in allowance for the existing Bobcat S250, will be \$48,737.44. Funds for this purchase are appropriately budgeted within the Parks & Recreation Department's current budget.

25-697

Purchase - Replacement/Expansion Vehicles

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Fleet requests the approval to purchase sixteen (16) replacement and/or expansion vehicles. Seven (7) vehicles are replacements for existing assets that have met their use in life in accordance with the vehicle replacement policy and were approved for replacement in the FY26 budget. Nine (9) vehicles are expansion vehicles which were approved in the FY26 budget. A summary of the replacement and expansion vehicles is as follows:

Replacements

- (1) 2026 Ford Explorer 4WD - Replaces 41-08, UC Water, \$39,344.16
- (1) 2026 Ford F250 Crew Cab 4WD - Replaces 55-14, Fire Services \$50,230.18
- (1) 2026 Ford F150 Super Cab 4WD - Replaces 33-13, \$42,142.78
- (1) 2026 Ford F150 Super Cab 4WD - Replaces 70-16, \$42,142.78
- (1) 2026 Ford F150 Super Cab 4WD - Replaces 16-16, \$42,142.78
- (1) 2026 Ford F150 Super Cab 4WD - Replaces 34-13, \$42,142.78
- (1) 2026 Ford F150 Super Cab 4WD - Replaces 56-14, \$42,142.78

Expansions

- (1) 2026 Ford Explorer 4WD - Expansion, Assessment, \$39,344.16
- (1) 2026 Ford F250 Crew Cab 4WD - Expansion, Solid Waste, \$50,093.88
- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01
- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01
- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01
- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01
- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01
- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01
- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01

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 vehicles will be made using North Carolina State Term Contract 2510A as quoted by Deacon Jones Ford of Clinton. The Procurement Department has vetted this contract and purchase amount.

FINANCIAL IMPACT:

The anticipated cost for the vehicles is \$696,816.35 and is budgeted accordingly for FY26.

25-700**Bid Award and Construction Contract - Union County Progress Building Backup Generator****INFORMATION CONTACT:**

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

ACTION REQUESTED:

1) Award contract to Hinson Electric, Inc. in the amount of \$481,800.00; 2) authorize the County Manager to i) negotiate and execute and 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; and 3) adopt Resolution Providing Notice of Construction of the Union County Progress Building Backup Generator.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The project scope entails providing and installing a backup generator to provide full building backup power in the event of an emergency or during the loss of normal utility power. The backup generator will help ensure essential services can continue to be provided in the event of a loss of power to the Progress Building.

On September 16, 2025, the Procurement and Contract Management Department partnered with the Facilities and Fleet Management Department to issue IFB 2026-024. On October 15, 2025, eight (8) bids for the titled project were received and processed. The bids were tabulated, reviewed and certified by Progressive Architecture and Engineering, P.C. The bids ranged from \$448,800.00 - \$1,095,600.00; staff recommend that the project be awarded to the lowest responsive, responsible bidder acknowledging all required forms in their bid submission, Hinson Electric, Inc., in the amount of \$481,800.00.

FINANCIAL IMPACT:

The cost to execute this contract is \$481,800.00. There are sufficient finds in capital account number 40080209 to cover this expense.

25-702**Tax Bill Correction Report for October 2025****INFORMATION CONTACT:**

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

ACTION REQUESTED:

Approve Tax Bill Correction Reports for October 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:

October Refund amount = \$21,093.01

25-703**Contract - Phone System Upgrade****INFORMATION CONTACT:**

Jon Amelio, Information Technology, Director, 704-283-3533

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Procurement Department partnered with Information Technology to issue Request for Proposals 2025-022 Union County Phone System Upgrade. On December 19, 2024, eighteen proposals were received and reviewed by an evaluation team in accordance with applicable evaluation criteria for this project. The top ranked six 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, Ring Central, Inc, to provide Cloud Phone services. This contract has an initial term of five years with three two-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 \$271,958.40. Since this contract contains a five-year term with three two-year renewal options, a total of \$2,991,542.40 is estimated to be spent. Funding is available in the adopted FY2026 budget with future expenditures subject to annual BOCC budget appropriation.

25-708**Minutes for Approval****INFORMATION CONTACT:**

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

ACTION REQUESTED:

Approve minutes

PRIOR BOARD ACTIONS:

None

BACKGROUND:

Draft minutes have been sent to Commissioners for review and approval

FINANCIAL IMPACT:

None

Information Only**25-691****Union EMS Quarterly Financial Statements****INFORMATION CONTACT:**

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union EMS provides unaudited quarterly reports and an annual audited financial report to the County as required by contract terms.

FINANCIAL IMPACT:

None.

25-704**Communications Monthly Report - October 2025****INFORMATION CONTACT:**

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

None.

Business**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 #: 25-714

Agenda Date: 11/17/2025

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.

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

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

File #: 25-685

Agenda Date: 11/17/2025

TITLE:

Public Hearing - Rezoning Petition CZ-2025-005 Secrest

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 case is requesting a revision of the Union County Zoning Map by rezoning one parcel totaling 11.958 acres outside of road right of way appearing on the tax map as tax parcel 07-042-002A along Secrest Short Cut Road from R-20 to B-4 with Conditions. The flea market incorporated a special use permit approval as part of this rezoning. The rezoning will include the following conditions:

- 1) Limited to site plan dated August 17, 2025
- 2) Uses limited to flea market and driving school
- 3) Owner will construct improvements to Secrest Short Cut as required by NCDOT
- 4) Five-year vesting of development rights
- 5) Development will meet all requirements of the Union County Unified Development Ordinance as of the date of approval

The Land Use Board evaluated this proposal at its October 21 meeting and recommended denial on a 5-1 vote, noting flood and noise concerns. One member of the public spoke and expressed concern over noise and traffic impacts.

If the Board of Commissioners wishes to make a decision on this rezoning, it may 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-2024-005 from Karmyne Milton; and (ii) adopt the consistency and reasonableness statement for denial.

FINANCIAL IMPACT:

None.

Application for Conditional Rezoning

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

UPDATED INFORMATION

General Information

Project Address 6615 Secrest Shortcut Rd City Indian Trail State NC Zip 28079

Tax Parcel ID 07042002A Current Zoning Designation R-20 Total Acres 11.9580

Proposed Zoning Designation B-4 Date Submitted 3-28-25

Contact Information

Applicant Name Karmyne Milton

Address 1420 Rama Rd City Charlotte State NC Zip 28211

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

Property Owner Name Matt Construction Inc.

Address 4506 STATESVILLE RD City CHARLOTTE State NC Zip 28269

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

Applicant's Certification

[Signature]
Signature

03/28/2025
Date

Karmyne Milton/Authorized Agent
Printed Name/Title

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

[Signature]
Signature

03/28/2025
Date

Mehmet Ilik/owner
Printed Name/Title

Union County Office Use Only:

Case Number: 2024-CZ-005 Date Received: 3-28-25

Amount of Fee: N/A Fee Ok: BEA Received by: BEA
Change of applicant

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

BEN BARRY

TELEPHONE (704) 996-8945

hasben@carolina.rr.com

July 3, 2024

PROJECT : Rezone 11 acre site on Secrest Shortcut Road from R20 to B4 ~~HC~~ (tbd)
(See attached Site Plan)

CLIENT : Mehmet Ilik – purchaser (pending)

CURRENT

OWNERS : Amy R. Cline and Annette R. Mills

PROPOSED USE : Flea Market on Weekends – Driving School weekdays

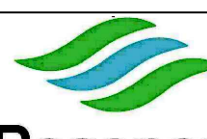
More than half of the property is currently Flood Plain – see attachment- and there is a large Power Line Right of Way dividing the useable portion. A large part of the useable portion across the power R/W is wooded and proposed to remain so. The proposal is for a remaining useable portion to be used for overflow parking.

Two entrance/exit drives are proposed off of Secrest Shortcut Road – one to the main parking and one to an overflow area. There are existing turn lanes to each driveway entrance, although the turns need to be re-striped to serve the opposite direction.

The proposed areas to be rezoned =	26,657 sf - overflow parking
(areas are approximate,	9,884 sf - power R/W crossing
subject to survey)	41,155 sf - building + parking

The current plan is construct a building (probably metal building) of approximately 9,600 square feet (or what area is feasible) to provide necessary toilets, an office, and covered vendor spaces. Other outdoor spaces will be available to vendors on weekends as needed.

Ben Barry
(704) 996-8945
ben@thebigride.org



Rosenau

Engineering

4108 SAINT JOSEPH DR
INDIAN TRAIL, NC 28079
704-893-5482
www.rosenauengineering.com
NCBES CERT. NO. - P-1789

SEALS:

JOHNATHAN S. ROSENAU

ENGINEER

037143

JOHNATHAN S. ROSENAU

NC P.E. #037143

PROJECT NAME:

SECRET SHORTCUT ARTISAN MARKET
& DRIVERS' EDUCATION

6615 SECREST SHORTCUT ROAD (PARCEL ID 07042002A)
VANCE TOWNSHIP, UNION COUNTY, NORTH CAROLINA 28079

CLIENT:

KEMPO CORPORATION INC
4506 STATESVILLE ROAD
CHARLOTTE, NC 28269
704-605-2124
KARMYNEM@YAHOO.COM

DATE: 03/21/2025
REVISIONS:

A

05/03/2025

REVISION

A

06/17/2025

COMMUNITY MING

JOB NO: 25108
SHEET TITLE:

CONDITIONAL
ZONING PLAN

SCALE: 1" = 40'
SHEET NO.:

CZP-1

© ROSENAU ENGINEERING, PLLC

PROJECT DATA	
OWNER:	KEMPO CORPORATION INC.
OWNER CONTACT:	KARMYNE MILTON
OWNER ADDRESS:	4506 STATESVILLE ROAD, CHARLOTTE, NC 28269
OWNER PHONE:	704-605-2124
OWNER EMAIL:	KARMYNEM@YAHOO.COM
APPLICANT:	KEMPO CORPORATION INC.
APPLICANT CONTACT:	KARMYNE MILTON
APPLICANT ADDRESS:	4506 STATESVILLE ROAD, CHARLOTTE, NC 28269
APPLICANT PHONE:	704-605-2124
APPLICANT EMAIL:	KARMYNEM@YAHOO.COM
Digitally signed by Jonathan S Rosenau 'Date: 2025.08.22 14:40:11 -04'00	
CIVIL ENGINEER:	JONATHAN S. ROSENAU, P.E., ROSENAU ENGINEERING, PLLC
CIVIL ENGINEER ADDRESS:	4108 ST. JOSEPH DRIVE, INDIAN TRAIL, NC 28079
CIVIL ENGINEER PHONE:	704-893-5482
CIVIL ENGINEER EMAIL:	JONROSENAU@ROSENAUENGINEERING.COM
SITE ADDRESS:	6615 SECREST SHORTCUT ROAD, INDIAN TRAIL, NC
PARCEL ID:	07042002A
LAND DEVELOPMENT AGENCY:	UNION COUNTY
WATER/SEWER AGENCIES:	UNION COUNTY; NCDEQ
STORMWATER MANAGEMENT AGENCY:	NCDEQ
EROSION CONTROL AGENCY:	NCDEQ
DRIVEWAY/ROADWAY AGENCY:	NCDOT
OPEN SPACE REQUIRED:	52,089 SQUARE FEET (@ 10% OF 11.958 ACRES)
OPEN SPACE PROVIDED:	67,120 SQUARE FEET (1.54 ACRES; 12.9%)
IMPROVED OPEN SPACE PROVIDED:	26,630 SQUARE FEET (0.61 ACRES; 5.1%)
TREE CONSERVATION AREA REQUIRED:	NONE
TREE CONSERVATION AREA PROVIDED:	NONE
HERITAGE TREES:	NONE
CURRENT ZONING:	RESIDENTIAL (R-20)
PROPOSED ZONING:	GENERAL COMMERCIAL (B-4)
EXISTING USE:	NONE
PROPOSED USE:	OFFICE (DRIVERS EDUCATION) & FLEA MARKET (ARTISAN MARKET)
TOTAL PROPERTY AREA:	11.958 ACRES (520,890 SQ. FT.)
REQUIRED RIGHT-OF-WAY DEDICATION:	50 FOOT FROM CENTERLINE OF RIGHT-OF-WAY
RIGHT-OF-WAY DEDICATION:	0.44 AC (19,052 SQ-FT)
MINIMUM LOT SIZE:	NO MINIMUM
MINIMUM LOT WIDTH:	NO MINIMUM
MINIMUM STREET SETBACK:	40 FEET
MINIMUM SIDE SETBACK:	20 FEET
MINIMUM REAR SETBACK:	40 FEET
MAXIMUM BUILDING HEIGHT:	50 FEET
PROPOSED BUILDING HEIGHT:	20 FEET
PROPOSED BUILDING SIZE:	9,600 SQUARE FEET (7,200 SF FLEA MARKET; 2,400 SF OFFICE)
MAXIMUM ALLOWED PARKING:	25% ABOVE MINIMUM REQUIRED 55 SPACES x 125% = 69 SPACES
MINIMUM REQUIRED PARKING: (*REFERENCING CITY OF MONROE UDO TABLE 8.4.1 FOR MARKETS & PRODUCE STANDS)	2 SPACES PER 1,000 SF MARKET AREA* 23,500 SF x 2 SPACE/1,000 SF = 47 SPACES* 1 SPACE PER 300 SF OFFICE 2,400 SF OFFICE x 1 SPACE/300 SF = 8 SPACES 47 SPACES* + 8 SPACES = 55 TOTAL SPACES
PROPOSED PARKING:	62 SPACES (WITH AT LEAST 3 ACCESSIBLE SPACES)
MINIMUM PARKING SPACE DIMENSIONS:	9'x19'
PROPOSED PARKING SPACE DIMENSIONS:	9'x19'
MINIMUM LOADING SPACES REQUIRED:	NONE
MINIMUM STREET FRONTAGE LANDSCAPING:	S1 SCREENING (10 FOOT WIDE; 3 FT TALL HEDGE WITH 1 TREE EVERY 50 FEET)
MINIMUM PERIMETER PARKING LOT LANDSCAPING:	S1 SCREENING (10 FOOT WIDE; 3 FT TALL HEDGE WITH 1 TREE EVERY 50 FEET)
MINIMUM INTERIOR PARKING LOT LANDSCAPING:	1 SHADE TREE & 4 SHRUBS PER 10 SPACES; LANDSCAPE ISLANDS 150 SF & 8 FOOT WIDTH; LANDSCAPE ISLAND EVERY 10 SPACES
MINIMUM LAND USE BUFFER:	S2 SCREENING (10 FOOT WIDE; 6 FT TALL HEDGE WITH 1 TREE EVERY 40 FEET)
ADDITIONAL LAND USE BUFFER:	10 FOOT NATURAL ALONG NORTHERN PROPERTY LINE ABUTTING RESIDENTIAL HOMES
MAJOR RIVER BASIN:	YADKIN
WATERSHED:	CROOKED CREEK
STREAMS:	NORTH FORK CROOKED CREEK TRIBUTARY B
PROPOSED STREAM IMPACTS:	NONE
STREAM BUFFER:	100 FOOT
FEMA FLOOD ZONE:	ZONE AE; CID 370234 PANEL 5418; PRELIMINARY DATE: MARCH 31, 2023
PROPOSED FLOODPLAIN IMPACTS:	TEMPORARY UTILITY CONSTRUCTION ONLY
STORMWATER MANAGEMENT:	ATTENDATE 2; 10' AND 50-YEAR STORM EVENTS
STORMWATER TREATMENT:	TREAT 1-INCH PER NCDEQ REQUIREMENTS
EXISTING IMPERVIOUS:	NONE
PROPOSED IMPERVIOUS:	52,000 SQUARE FEET (1.19 ACRES; 10.00%)
PROPOSED DISTURBED AREA:	172,000 SQUARE FEET (3.95 ACRES; 33.02%)
WASTEWATER TREATMENT PLANT:	TWELVE MILE CREEK
DOMESTIC WATER:	UNION COUNTY WATER
SUNFLOWER PROTECTION:	SUNFLOWER IDENTIFICATION SURVEY NOT REQUIRED

ADJACENT PROPERTY OWNERS		
PARCEL ID	NAME	MAILING ADDRESS
07045015	HONEYCUTT FAMILY FARMS LLC	6510 SECREST SHORTCUT RD, INDIAN TRAIL, NC 28079
07042001	PAUL C & FAITH W LEVERING	5817 WOODY GROVE RD, INDIAN TRAIL, NC 28079
0042003	ARBOR GLEN COMMUNITY ASSOCIATION INC	C/O COMMUNITY ASSOCIATION MANAGEMENT, CHARLOTTE, NC 28271
07042088	FKH SFR PROPCO ALP	C/O FIRSTKEY HOMES LLC, ATLANTA, GA 30339
07042089	VALENTINA POMERLYAN	1021 SOUTHWIND TRAIL DR, INDIAN TRAIL, NC 28079
07042090	REGINALD T JENKINS & MELISSA BROWN-JENKINS	1019 SOUTHWIND TRAIL DR, INDIAN TRAIL, NC 28079
07042091	JOHN MICHAEL & ALICIA PAULSEN VAN HEESCH	1017 SOUTHWIND TRAIL DR, INDIAN TRAIL, NC 28079
07042092	ERVING & ZULMA TORRES	1015 SOUTHWIND TRAIL DR, INDIAN TRAIL, NC 28079
07042093	NIKITA IGOREVICH SAVCHENKO & OLENA PATRISIA HYNKU	1013 SOUTHWIND TRAIL DR, INDIAN TRAIL, NC 28079
07042094	ASSEFA FOLLE & YODIT ADMASU	1011 SOUTHWIND TRAIL DR, INDIAN TRAIL, NC 28079
07042095	MIGUEL A ELCOROBARRUTIA	1009 SOUTHWIND TRAIL DR, INDIAN TRAIL, NC 28079
07042096	GEBREGIRHANE T ASFEHA & ASTER Z GEBRE	1007 SOUTHWIND TRAIL DR, INDIAN TRAIL, NC 28079
07042097	JOHN CHARLES CLARK JR	1855 SAINT THOMAS RD, VISTA, CA 92081
07042098	FRANCIS MARINO JR & ANGELA MARINO	1003 SOUTHWIND TRAIL DR, INDIAN TRAIL, NC 28079
07042139	ARBOR GLEN COMMUNITY ASSOCIATION INC	C/O COMMUNITY ASSOCIATION MANAGEMENT, CHARLOTTE, NC 28271
07021335A	BONTERRA VILLAGE HOMEOWNERS ASSOCIATION INC	2403 BONTERRA BLVD, INDIAN TRAIL, NC 28079
07021335	PINE CREEK LAND COMPANY LLC	PO BOX 219, MARSHVILLE, NC 28103

GENERAL NOTES:

- ALL CONSTRUCTION TO BE CONDUCTED IN COMPLIANCE WITH UNION COUNTY'S STANDARDS AND SPECIFICATIONS. SITE PLAN WILL FULLY COMPLY WITH ALL PROVISIONS OF THE UNION COUNTY DEVELOPMENT ORDINANCE.
- ANY WORK CONDUCTED WITHIN THE ROADWAY RIGHT OF WAY MUST BE APPROVED AND COORDINATED WITH NCDOT.
- SHRUBS AND TREES SHOULD BE SELECTED FROM THE COUNTY'S APPROVED VEGETATION LIST AND PLANTED IN ACCORDANCE WITH COUNTY SPECIFICATIONS.
- DUMPSTER AND OTHER TRASH/RECYCLE RECEPTACLES TO BE SCREENED FROM ROADWAY AND ADJACENT PROPERTIES.
- COUNTY PERMITS INCLUDING FENCE, SIGN, UPFIT, DEMO AND USE MAY BE REQUIRED AFTER CONCEPT PLAN APPROVAL. OWNER SHOULD WORK WITH COUNTY TO OBTAIN THE NECESSARY PERMITS.
- SPECIFIC SITE LAYOUT SHALL BE APPROVED BY COUNTY'S STAFF VIA COUNTY'S PERMIT REVIEW PROCESS. THE LAYOUT DEPICTED IN THIS CONDITIONAL ZONING PLAN IS CONCEPTUAL IN NATURE. OWNER SHALL HAVE THE RIGHT TO MODIFY CONFIGURATION IN ACCORDANCE WITH COUNTY'S ZONING ORDINANCE AND REGULATIONS.
- PROPERTY SHALL COMPLY WITH ALL COUNTY ZONING REGULATIONS WITH THE EXCEPTION OF THE CONDITIONS AGREED UPON THROUGH THIS CONDITIONAL ZONING APPROVAL. REFER TO THE AGREED UPON AUTHORIZED DEVIATIONS FROM THE ZONING ORDINANCE FOR DETAILS.
- TOPOGRAPHIC SURVEY AND GEOTECHNICAL REPORT WILL BE NECESSARY PRIOR TO DEVELOPMENT OF CONSTRUCTION DOCUMENTS.
- NO FILL SHALL BE PLACED WITHIN THE FEMA FLOODPLAIN INCLUDING BOTH EFFECTIVE AND PRELIMINARY AREAS UNLESS APPROVED BY COUNTY AND FEMA.
- ANY SITE LIGHTING WILL NEED TO BE APPROVED BY COUNTY.

DEVELOPMENT VISION:

OWNER ENVISIONS PROPERTY AS A GATHERING PLACE FOR LOCAL ARTISANS AND FARMERS TO DISPLAY AND SELL THEIR LOCALLY MADE CRAFTS AND PRODUCE. THE INDOOR ARTISAN MARKET WILL BE OPEN YEAR ROUND. THE OUTDOOR ARTISAN MARKET WILL BE OPEN ON PREARRANGED DAYS AS WEATHER ALLOWS.

THE PROPOSED BUILDING WILL ALSO BE THE HOME OF A DRIVERS EDUCATION SCHOOL FOCUSING ON HELPING PREPARE NEW DRIVERS.

PARCEL 07042001
OWNER: PAUL & FAITH LEVERING
ZONING: SF-1, MIXED-USE OVERLAY (INDIAN TRAIL)
USE: VACANT/WOODED

PARCEL 07045015
OWNER: HONEYCUTT FAMILY FARMS LLC
ZONING: SF-1, MIXED-USE OVERLAY (INDIAN TRAIL)
USE: FARM

C:\Users\jrosenau\Engineering\GP Eng - Rosenau Engineering - Documents\General\25108 - Kempo - Secret Site Plan\Cell\08\Parcel\25108 SP.dwg, 8/22/2025 1:18:46 PM, ARCH full bleed D (24.00 x 36.00 inches)

July 11, 2025

Mehmet Ilik
ilikmehmet00@gmail.com

RE: Impact Study – Proposed Flea Market (Artisan Market) and Office Building, Secrest Short Cut Road, Union County, NC.

Dear Mr. Ilik:

At your request, we have prepared a summary of our findings relating to an impact study of surrounding developments for a proposed flea market and office building development. The study evaluates real estate transactions for comparable properties near the same or a similar use elsewhere to determine if the development will harm property values.

Our analysis focuses on whether the proposed development will injure the value of surrounding property. To determine the impact, if any, the consultant focuses research on a neighborhood overview as well as an analysis on the proposed development's conformity with the surrounding neighborhood. We then research similar developments with adjacent or nearby sales and then compare those sales to similar sales further away. This attempts to isolate any potential influence from the development.

In order to assess conformity with the surrounding neighborhood, we have researched the future land use plan for the subject's neighborhood and nearby proposed developments.

We also compare sales on adjacent properties to those for non-adjacent properties and then analyze the results. It is noted that when selecting data to analyze, we select comparable developments that also include a flea market development. We have also selected other more intensive commercial uses such as car washes and collision centers. The best available data was selected and included in this study.

PROPOSED DEVELOPMENT

The subject property will be a Flea/Artisan Market and Office Building on an 11.859-acre tract at 6615 Secrest Short Cut Road in Indian Trail, Union County, NC. The property is currently mostly vacant except for a Duke Energy Power Tower and a 150' wide easement bisects the property.

The property is planned for a 9,600 square foot indoor artisan market to include a 7,200 square foot flea market and a 2,400-square-foot office area to be used for a driving school. It will have 63 spaces for parking.

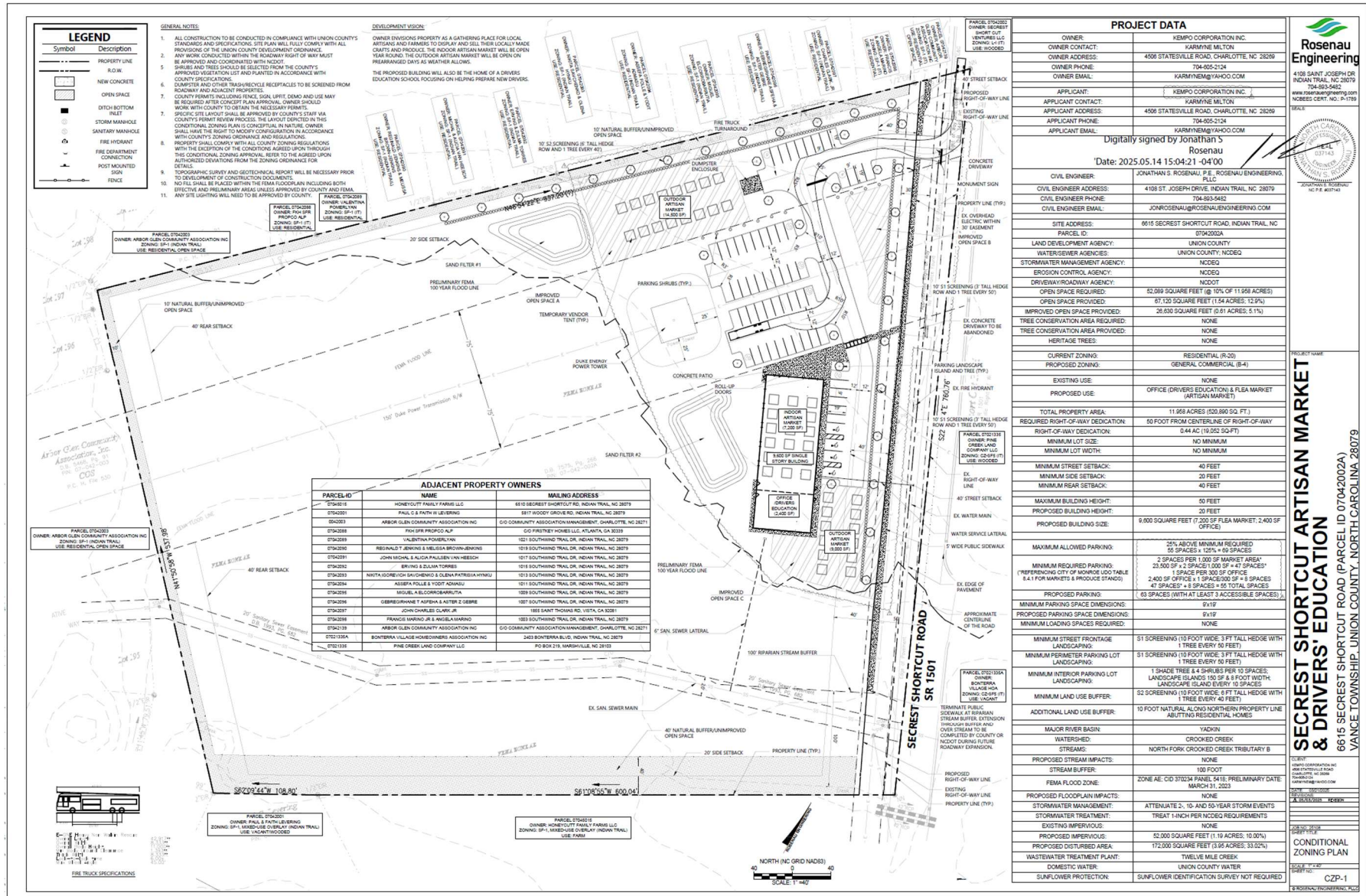
Currently the closest homes are 90 feet away or more from the property line. The development includes a 10-foot natural buffer followed by a 10-foot screening buffer including 6' hedges and trees every 40 feet. The proposed outdoor parking and the outdoor artisan market area are on the other side of the buffers from the homes. The proposed office and market building is over 300 feet away from any homes.

Surrounding uses include vacant farmland, woodland, HOA land and single family homes generally ranging between 1,800 and 3,000 square feet and built in the early 2000's. Recent sales are near \$400,000.

An aerial, site plan, photographs and area map are shown to follow.



AERIAL



CONDITIONAL ZONING PLAN

DEVELOPMENT VISION:

OWNER ENVISIONS PROPERTY AS A GATHERING PLACE FOR LOCAL ARTISANS AND FARMERS TO DISPLAY AND SELL THEIR LOCALLY MADE CRAFTS AND PRODUCE. THE INDOOR ARTISAN MARKET WILL BE OPEN YEAR ROUND. THE OUTDOOR ARTISAN MARKET WILL BE OPEN ON PREARRANGED DAYS AS WEATHER ALLOWS.

THE PROPOSED BUILDING WILL ALSO BE THE HOME OF A DRIVERS EDUCATION SCHOOL FOCUSING ON HELPING PREPARE NEW DRIVERS.

GENERAL NOTES:

1. ALL CONSTRUCTION TO BE CONDUCTED IN COMPLIANCE WITH UNION COUNTY STANDARDS AND SPECIFICATIONS. SITE PLAN WILL FULLY COMPLY WITH ALL PROVISIONS OF THE UNION COUNTY DEVELOPMENT ORDINANCE.
2. ANY WORK CONDUCTED WITHIN THE ROADWAY RIGHT OF WAY MUST BE APPROVED AND COORDINATED WITH NCDOT.
5. SHRUBS AND TREES SHOULD BE SELECTED FROM THE COUNTY'S APPROVED VEGETATION LIST AND PLANTED IN ACCORDANCE WITH COUNTY SPECIFICATIONS.
6. DUMPSTER AND OTHER TRASH/RECYCLE RECEPTACLES TO BE SCREENED FROM ROADWAY AND ADJACENT PROPERTIES.
7. COUNTY PERMITS INCLUDING FENCE, SIGN, UPFIT, DEMO AND USE MAY BE REQUIRED AFTER CONCEPT PLAN APPROVAL. OWNER SHOULD WORK WITH COUNTY TO OBTAIN THE NECESSARY PERMITS.
7. SPECIFIC SITE LAYOUT SHALL BE APPROVED BY COUNTY'S STAFF VIA COUNTY'S PERMIT REVIEW PROCESS. THE LAYOUT DEPICTED IN THIS CONDITIONAL ZONING PLAN IS CONCEPTUAL IN NATURE. OWNER SHALL HAVE THE RIGHT TO MODIFY CONFIGURATION IN ACCORDANCE WITH COUNTY'S ZONING ORDINANCE AND REGULATIONS.
8. PROPERTY SHALL COMPLY WITH ALL COUNTY ZONING REGULATIONS WITH THE EXCEPTION OF THE CONDITIONS AGREED UPON THROUGH THIS CONDITIONAL ZONING APPROVAL. REFER TO THE AGREED UPON AUTHORIZED DEVIATIONS FROM THE ZONING ORDINANCE FOR DETAILS.
9. TOPOGRAPHIC SURVEY AND GEOTECHNICAL REPORT WILL BE NECESSARY PRIOR TO DEVELOPMENT OF CONSTRUCTION DOCUMENTS.
10. NO FILL SHALL BE PLACED WITHIN THE FEMA FLOODPLAIN INCLUDING BOTH EFFECTIVE AND PRELIMINARY AREAS UNLESS APPROVED BY COUNTY AND FEMA.
11. ANY SITE LIGHTING WILL NEED TO BE APPROVED BY COUNTY.

PARCEL 07042

CONDITIONAL ZONING PLAN DETAILS



FRONTAGE FACING NORTH



FRONTAGE FACING SOUTH



VIEW OF SITE



VIEW OF SITE



DUKE POWER TOWER AND SUBJECT INTERIOR



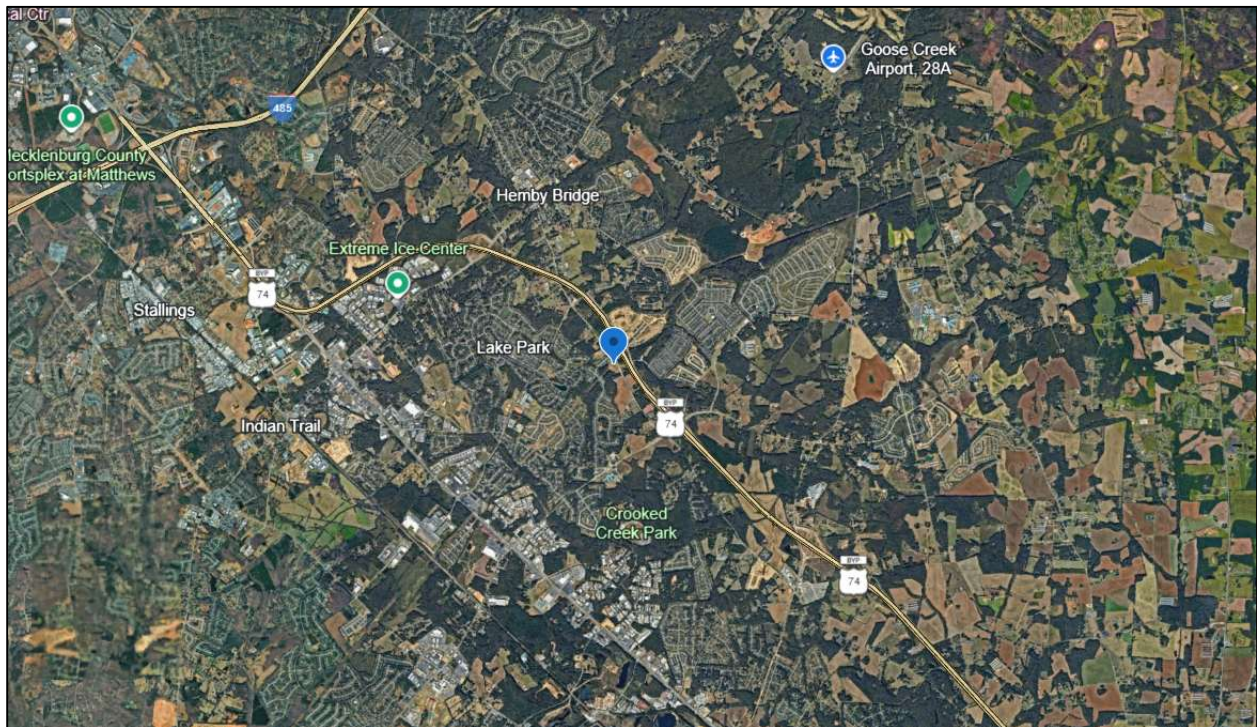
**REAR OF ADJACENT BOWLING ALLEY AND
SUBJECT SITE**



**VIEW OF TYPICAL HOME ADJACENT TO
SUBJECT**



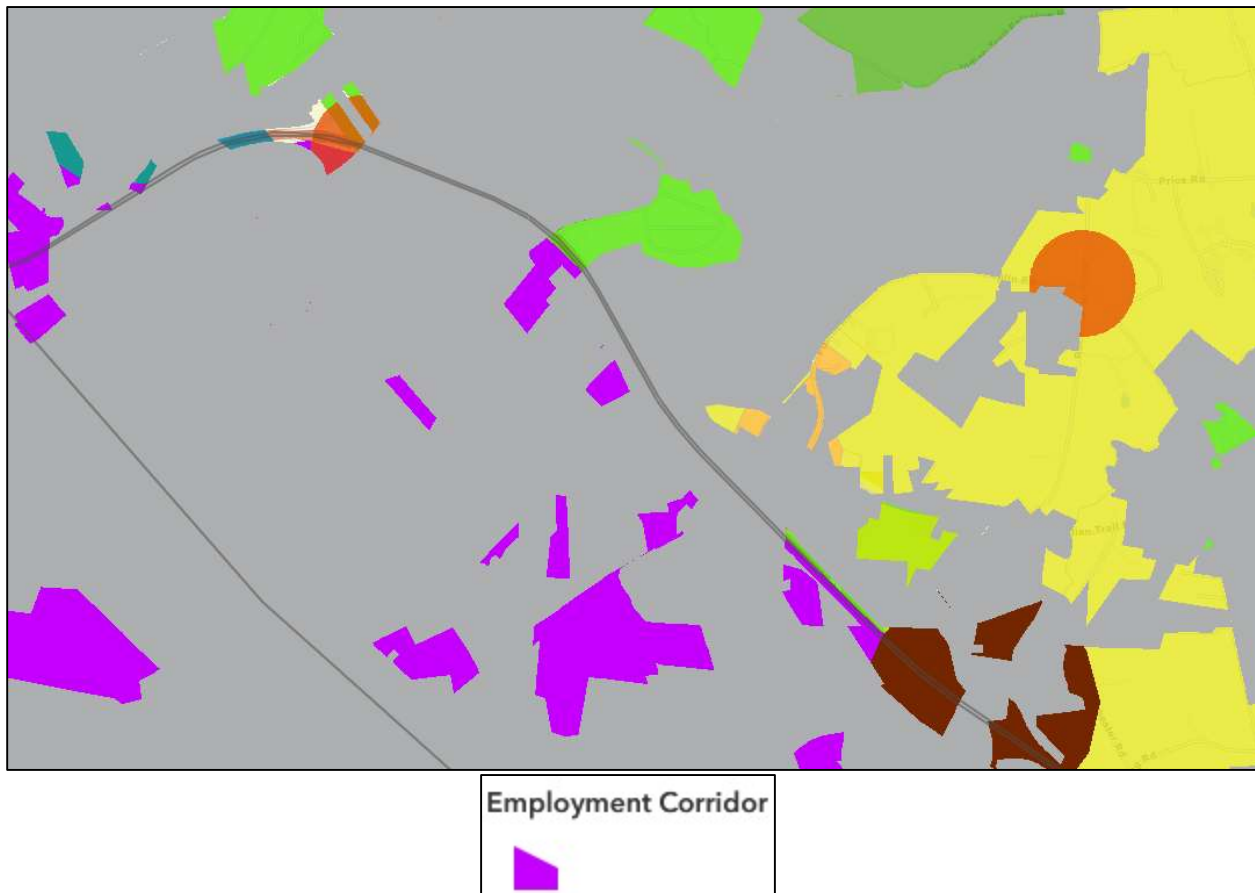
**VIEW OF SITE THROUGH EASEMENT AREA
FROM ADJACENT NEIGHBORHOOD**



AREA MAP

Union County 2050 Future Land Use Plan

Union County’s 2050 Land Use Plan serves as a guide for land use and development over the next 25 years. The plan will guide decisions affecting physical development and redevelopment within its planning jurisdictions. The close-ups of the subject area highlighted as “Employment Corridor” and are shown to follow.

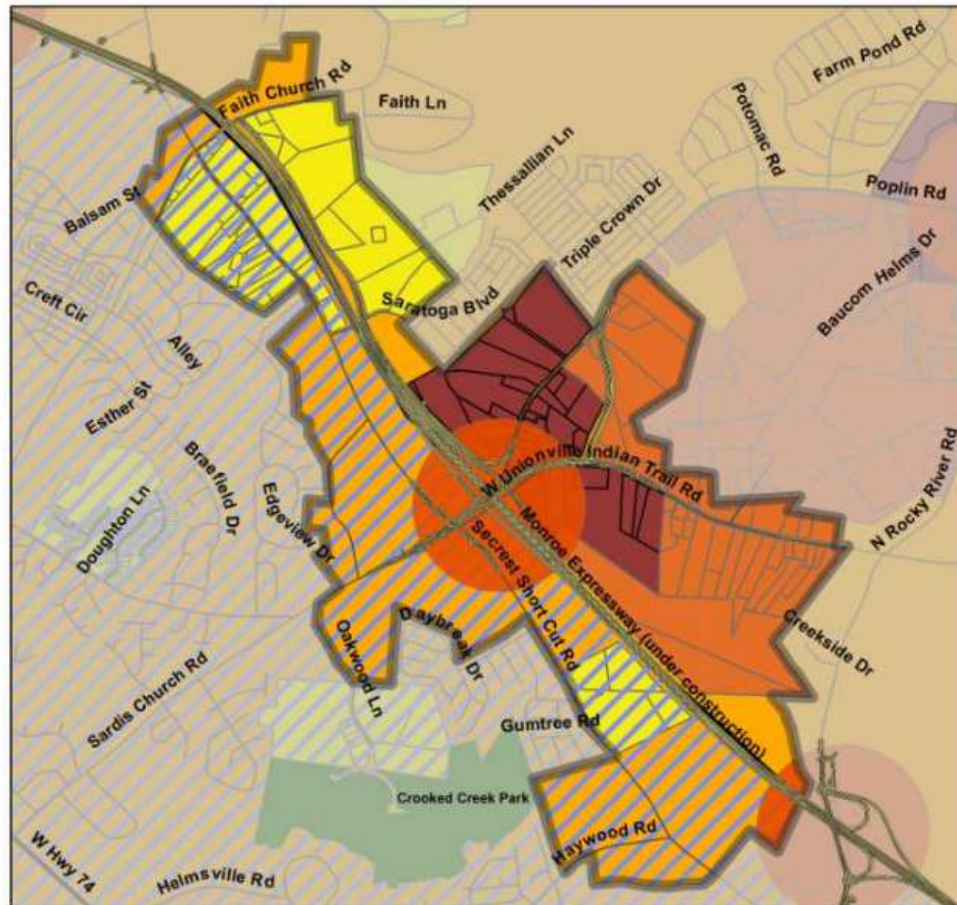


UNION COUNTY 2050 LAND USE MAP

Secret Short Cut Small Area Land Use Plan

The Secret Short Cut Land Use Plan serves as a guide for land use and development for the subject area. The subject area is highlighted as “Employment Corridor” and/or “Mixed Residential” and are shown to follow.

Secret Short Cut Small Area Plan Land Use Plans



Legend

- Monroe Expressway
- ▭ Study Area Boundary
- ▭ Neighborhood Center - Union County
- ▭ Employment Corridor - Union County
- ▭ Medium Density Residential - Indian Trail
- ▭ Mixed Use - Indian Trail
- ▭ Traditional Neighborhood Devt - Indian Trail
- ▭ Mixed Residential - Union County

Note: The Secret Short Cut Small Area Plan is a joint effort of Indian Trail and Union County to identify land uses and infrastructure most appropriate for the area in light of a significant change in access and mobility due to the proximity of the interchange with the Monroe Expressway.



0 2,000 4,000 Feet



Created on January 4, 2018 by Bjorn E. Hansen, AICP CTP.
Contact: (704) 283-3690 or bjorn.hansen@co.union.nc.us

SECREST SHORT CUT SMALL AREA PLAN SHOWING SUBJECT AS AN EMPLOYMENT CORRIDOR AND/OR MIXED-RESIDENTIAL

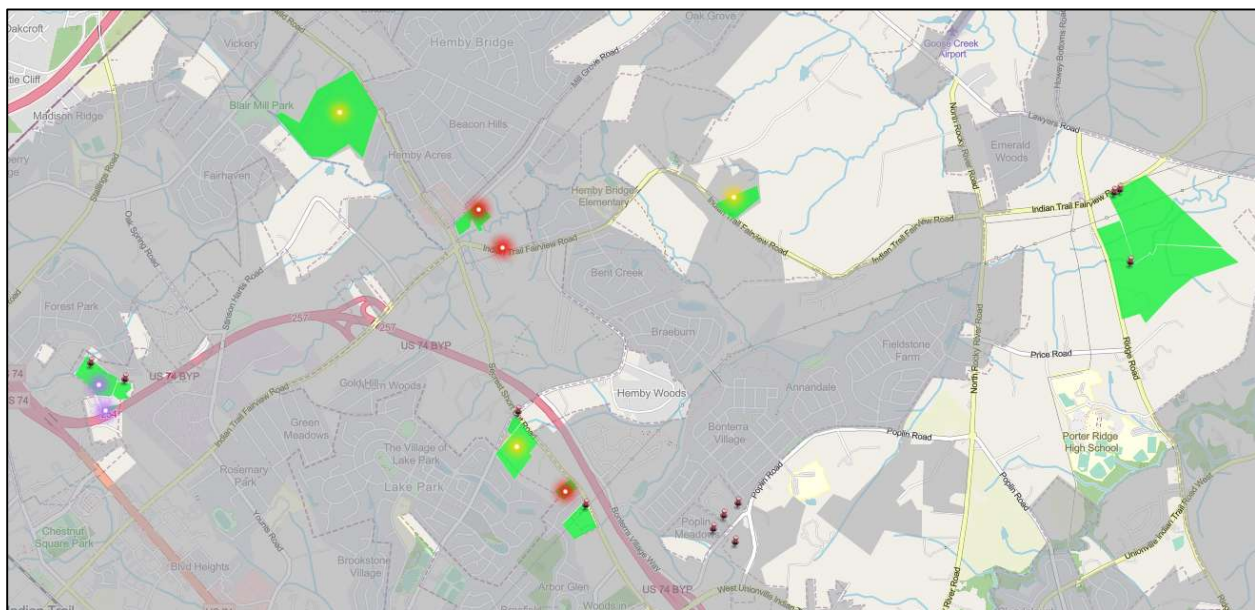
*Future Land Use Plan
and Small Area Plan
Conclusions*

The subject is designated for “Employment Corridor and/or “Mixed Residential” development in the plans. The proposed development appears consistent with the land use plans.

**Area Proposed
and Approved
Developments**

When evaluating the growth patterns of the subject’s neighborhood, we also consider proposed and approved developments.

Recently a church, a manufacturing plant, a sewer plant and subdivisions were approved in the subject area. Currently, a tow truck lot is proposed northeast of the subject at Secret Short Cut Road and Faith Church Road adjacent to the proposed Enclave, 18-lot subdivision.



PROPOSED OR APPROVED DEVELOPMENTS NEAR SUBJECT

*Area Development
Conclusions*

The subject area is growing, which indicates an increased demand for commercial development in the subject’s immediate neighborhood. Therefore, it is our opinion that the subject’s proposed use conforms with the growth patterns of the subject’s immediate neighborhood.

Sales of Properties Near Comparable Developments

We have analyzed sales in the past years of homes that are abutting a flea market development and sales that are not. The data indicates there is no detrimental impact or loss in value for home values that are closer to the development than similar homes in the same neighborhood. While efforts to include the most similar properties were made, we recognize that there are various influencing characteristics on value, other than location. These characteristics may include size, age and quality/condition. The analysis below intends to provide factual data. The comparable properties and houses were chosen based on their location in relation to one another with no information intentionally removed. The purpose of the analysis was to research the facts, followed by an analysis of the resulting information.

Millers Flea Market – 3674 Highway 51, Fort Mill

This approximate 31,000 square foot indoor flea market also has outdoor areas on over 15 acres. The property has been active as a flea market for decades and is one of the largest in the Charlotte MSA.

Beginning in 2018, Pulte Homes built many single-family homes as part of the McCulloch subdivision. We have researched the homes closest to the flea market and compared them to the homes further away.

The three sales near the flea market ranged from \$119 to \$123 per square foot and the sales away from the flea market ranged from \$105 to \$130 per square foot.

There is no evidence that being near the flea market impacted values negatively. An overview follows.

Sales Closer to Flea Market							
Address	Date	Price	Size (SF)	Year Built	Acre	Price/SF	Note
6010 Willow Branch Ct.	2-Apr-18	\$ 399,915	3,320	2018	0.32	\$ 120	60' to property line
6016 Willow Branch Ct.	4-May-18	\$ 366,825	3,080	2018	0.27	\$ 119	60' to property line
6022 Willow Branch Ct.	10-Apr-18	\$ 421,705	3,424	2018	0.36	\$ 123	60' to property line
Average						\$ 121	
Sales Away from Flea Market							
Address	Date	Price	Size (SF)	Year Built	Acre	Price/SF	Note
6021 Willow Branch Ct.	29-Nov-20	\$ 524,999	4,238	2020	0.4	\$ 124	150' to property line
6015 Willow Branch Ct.	22-May-18	\$ 434,500	4,135	2018	0.4	\$ 105	250' to property line
6009 Willow Branch Ct.	22-Apr-18	\$ 400,345	3,068	2018	0.36	\$ 130	250' to property line
8908 Gladden Hill Lane	21-Oct-19	\$ 380,455	2,960	2018	0.28	\$ 129	400' to property line
Average						\$ 122	



AERIAL
RED = FLEA MARKET
BLUE = SALE NEAR FLEA MARKET
GREEN = SALE AWAY FROM FLEA MARKET

As part of our analysis, we also examine sales around other uses most similar to flea markets and offices as we could research.

**6415 Wilkinson Boulevard
– AquaWave Car Wash**

This 5,120 square foot car wash was built in 2015 and is a full service drive thru. The four sales near the car wash ranged from \$234 to \$355 per square foot and the sales away from the car wash ranged from \$195 to \$317 per square foot. There is no evidence that being near the development impacted values negatively.

Sales Near Car Wash						
Address	Date	Price	Size (SF)	Year Built	Acre	Price/SF
114 Live Oak Ave.	19-Aug-22	\$ 215,000	844	1920	0.18	\$ 255
114 Live Oak Ave.	25-Apr-24	\$ 269,000	844	1920	0.18	\$ 319
114 Live Oak Ave.	2-Aug-24	\$ 283,000	844	1920	0.18	\$ 335
108 Live Oak Ave.	19-Jul-24	\$ 170,000	727	1920	0.18	\$ 234
Sales Away from Car Wash						
Address	Date	Price	Size (SF)	Year Built	Acre	Price/SF
113 Rankin St.	25-May-23	\$ 245,000	864	1920	0.17	\$ 284
109 Rankin St.	9-Mar-21	\$ 250,000	1344	1920	0.2	\$ 186
105 Rankin St.	13-Feb-24	\$ 275,500	869	1920	0.18	\$ 317
101 Rankin St.	8-Feb-22	\$ 295,000	1512	1920	0.2	\$ 195



AERIAL
RED = CAR WASH
BLUE = SALE NEAR CAR WASH
GREEN = SALE AWAY FROM CAR WASH

**1817 E. Franklin Boulevard
– Sams Xpress Car Wash**

This 3,993 square foot car wash is west of the subject and was built in 2016 and is a full-service drive thru. The two sales near the car wash ranged from \$126 to \$134 per square foot and the sales away from the car wash ranged from \$71 to \$169 per square foot. There is no evidence that being near the car wash impacted values negatively.

Sales Near Car Wash						
Address	Date	Price	Size (SF)	Year Built	Acre	Price/SF
1918 Country Club Rd.	6-Aug-24	\$ 350,000	2616	1938	1.28	\$ 134
2008 Country Club Rd.	18-Feb-22	\$ 299,000	2381	1935	0.57	\$ 126
Sales Away from Car Wash						
Address	Date	Price	Size (SF)	Year Built	Acre	Price/SF
225 Ridge Lane	29-Jul-24	\$ 445,000	3703	1951	0.69	\$ 120
1841 Country Club Rd.	18-Mar-20	\$ 175,000	2455	1925	0.56	\$ 71
1740 Montclair Ave.	2-Oct-20	\$ 550,000	5303	1962	1.04	\$ 104
1712 Montclair Ave.	19-May-20	\$ 235,000	2898	1966	0.46	\$ 81
1701 Montclair Ave.	11-Apr-25	\$ 330,000	2712	1964	0.39	\$ 122
1705 Montclair Ave.	8-Jul-20	\$ 201,000	1972	1958	0.35	\$ 102
1825 Montclair Ave.	24-Jun-21	\$ 315,000	1869	1969	0.42	\$ 169

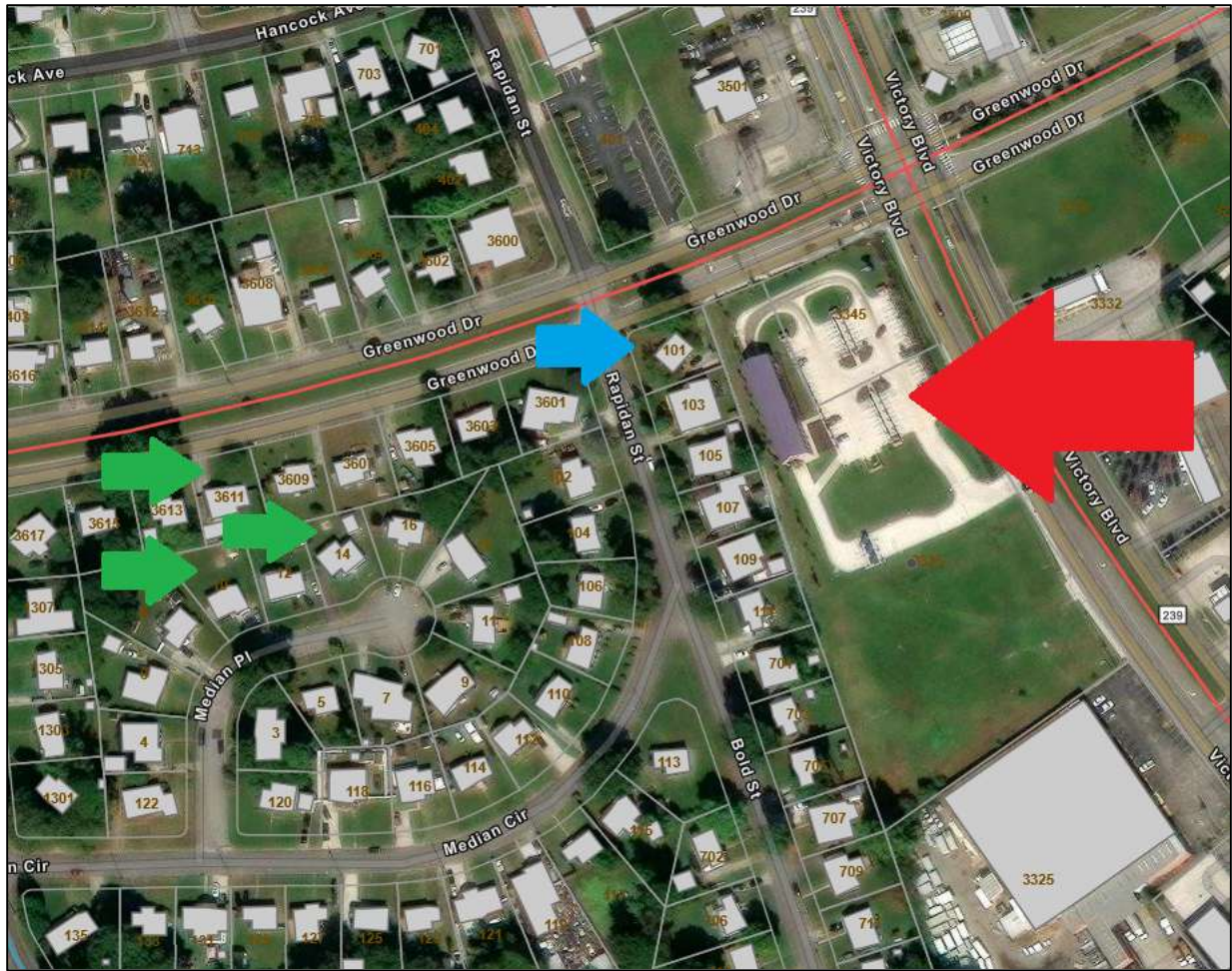


AERIAL
RED = CAR WASH
BLUE = SALE NEAR CAR WASH
GREEN = SALE AWAY FROM CAR WASH

**3335 Victory Boulevard in
Portsmouth, Virginia**

This is a similar RipTide car wash that was developed recently in Portsmouth, Virginia. It has homes in the rear. This 4,175 square foot car wash is a full service drive thru. The home sale directly behind the car wash sold for \$210,000 or \$233 per square foot. Three other sales not near the car wash sold for between \$180,000 and \$210,000 and \$175 to \$217 per square foot. There is no evidence that being near the car wash impacted values negatively.

Sales Near Car Wash						
Address	Date	Price	Size (SF)	Year Built	Acre	Price/SF
101 Rapidan St	11-Sep-23	\$ 210,000	900	1960	0.18	\$ 233
Sales Away from Car Wash						
Address	Date	Price	Size (SF)	Year Built	Acre	Price/SF
3611 Greenwood Dr.	20-Apr-23	\$ 210,000	1200	1940	0.18	\$ 175
18 Median Pl.	7-Sep-22	\$ 180,000	900	1942	0.27	\$ 200
10 Median Pl.	25-Oct-22	\$ 185,000	852	1940	0.21	\$ 217

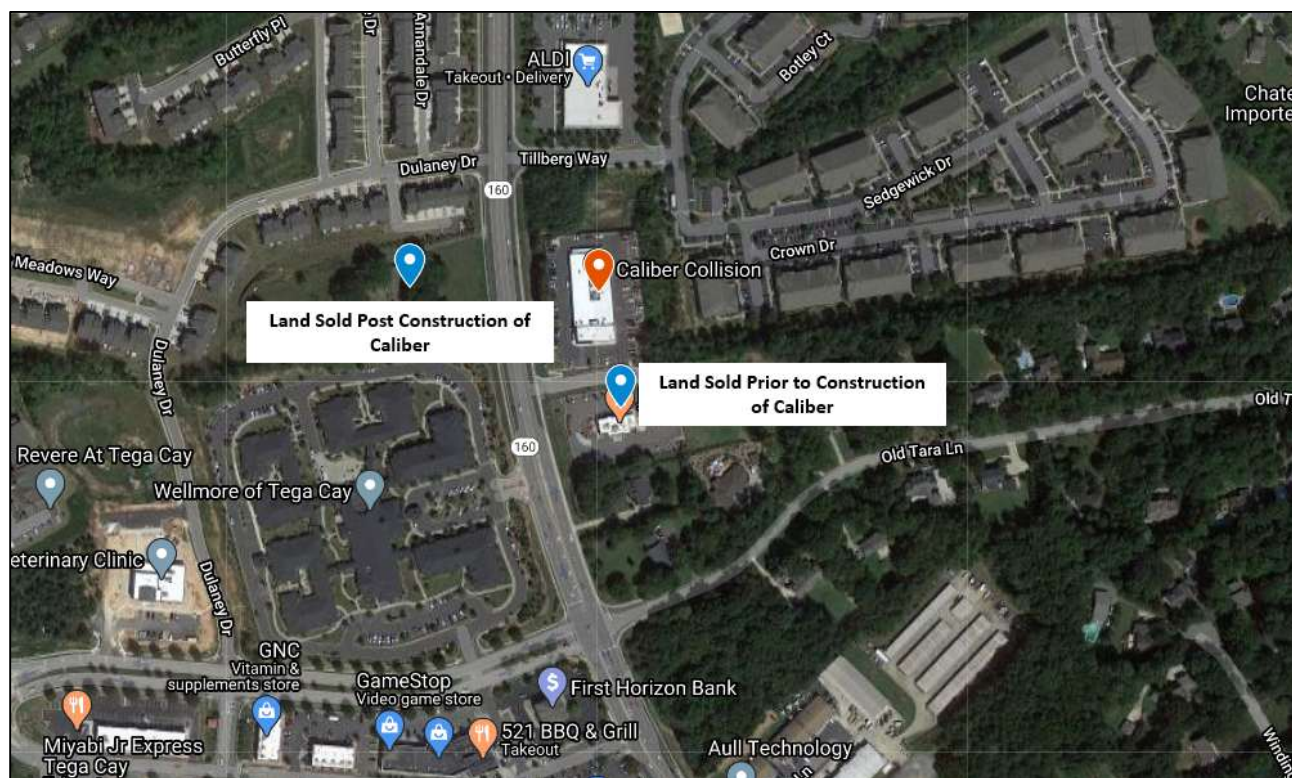


AERIAL
RED = CAR WASH
BLUE = SALE NEAR CAR WASH
GREEN = SALE AWAY FROM CAR WASH

Additional Sales Adjacent to Commercial Development

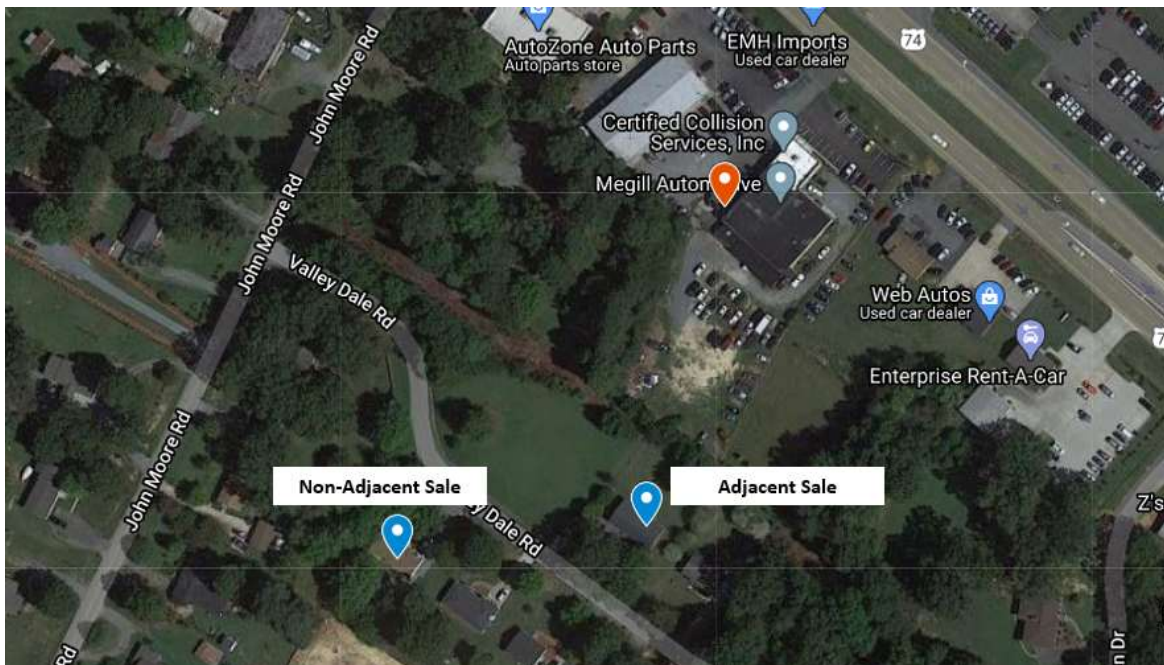
We also researched sales of properties abutting comparable developments versus sales of properties not abutting comparable developments as well as sales of properties before and after the construction of a comparable development. There were limited available sales abutting comparable developments near the subject's market and the best available data is included below. The first set of sales includes two parcels of commercial land that neighbor a Caliber Collision constructed in Fort Mill in 2018. The sales data shows there was no reduction in price per acre for neighboring commercial land after the construction of the Caliber Collision.

2540 Highway 160 W Parcel: 6500000662 Built in 2018					
	<u>Parcel:</u>	<u>Date</u>	<u>Price</u>	<u>Size</u>	<u>\$/Acre</u>
Sale prior to Construction of Caliber	6440101556	8/19/2016	\$872,500	2.83	\$308,195
Sale after Construction of Caliber	6500000032	11/2/2018	\$830,000	2.44	\$340,164



The second set of sales analyzed includes two residential properties. One sale was located adjacent to Certified Collision Services in Monroe and the second sale was a comparable dwelling that was not located adjacent to the Certified Collision Services. The sales did not show a decrease in value for being located adjacent to the automotive property. We recognize that there are various influencing characteristics on value, other than location. These characteristics may include size, age, and quality/condition.

Certified Collision Services 3215 W Roosevelt Boulevard, Monroe Parcel: 09298097						
	<u>Parcel:</u>	<u>Date</u>	<u>Price</u>	<u>Year Built</u>	<u>Size</u>	<u>\$/SF</u>
Sale Adjacent:	09298103	9/5/2018	\$137,000	1965	1,042	\$131.48
Sale Non-Adjacent:	09298112	10/16/2019	\$160,000	1971	1,350	\$118.52



Additional General Research Regarding Impacts of Commercial Development

We also researched a study of the impacts of commercial development on surrounding residential property values conducted by Jonathan A. Wiley, Ph.D., Associate Professor in the Department of Real Estate at Georgia State University. His study found that while retail developments may impact an initial negative price impact (typically during construction), following the completion of a new retail development, there is a sharp upward trend in surrounding residential property values within a 0.75-mile radius. Therefore, his study concluded that residential properties in an area slated for new retail development, overall sell at a significant premium compared to the residential properties that were outside of the 0.75-mile radius. The article goes on to say that while homeowners and brokers may have strong opinions to the contrary, the research concluded in his study did not find substantive evidence to support an overall or long-term negative impact on surrounding residential properties as a result of commercial development.

IMPACT STUDY CONCLUSIONS

As discussed in previous sections, the subject's proposed development is consistent with the neighborhood and in conformity with the projected growth patterns based on Future Land Use Plans. We also consider the neighboring residential properties and the potential impact, if any, to the residential properties. Based on data analyzed in the impact analysis, there is no detrimental impact on neighboring properties, and the use conforms to the neighborhood.

The data outlined above includes an analysis of existing development and growth patterns for the subject's neighborhood as well as a comparable summary of sales of properties abutting comparable developments. The analysis above intends to provide factual data gathered from the subject and surrounding markets. The purpose of the analysis was to

research the facts, followed by an analysis of the resulting information.

Sincerely yours,

T. B. HARRIS, JR. & ASSOCIATES

A handwritten signature in black ink, appearing to read "Bjaffin" or similar, written in a cursive style.

Benjamin H. Curran, MAI

ADDENDA

CERTIFICATION OF THE APPRAISER

I, Benjamin H. Curran, 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 performed no 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. The reported analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the *Uniform Standards of Professional Appraisal Practice*.
9. As of the date of this report, I have completed the continuing education program for Designated Members of the Appraisal Institute.
10. The reported analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the requirements of the *Code of Professional Ethics and Standards of Professional Practice* of the Appraisal Institute.
11. The use of this report is subject to the requirements of the Appraisal Institute relating to review by its duly authorized representatives.
12. I have made a personal inspection of the property that is the subject of this report.
13. No one provided significant real property appraisal assistance to the person(s) signing this certification other than those individuals having signed the attached report.



Benjamin H. Curran, MAI
(NC State Certified General Real Estate Appraiser # A7120)
(SC State Certified General Real Estate Appraiser #6879)

July 11, 2025

Date

QUALIFICATIONS OF THE APPRAISER***Benjamin H. Curran, MAI***

**T.B. Harris, Jr. & Associates
1125 E. Morehead Street, Ste. 202
Charlotte, North Carolina 28204
(704) 334-4686**

EDUCATION AND CREDENTIALS

- **University of South Carolina**

Bachelor of Arts Degree in Finance and Real Estate

2001 - 2005

North Carolina Real Estate Education, Inc.

R-1 -	Introduction to Real Estate Appraisal, 2005
R-2 -	Valuation Principles and Procedures, 2006
R-3 -	Applied Residential Property Valuation, 2006
USPAP	Uniform Standards of Professional Appraisal Practice, 2006
G1 -	Introduction to Income Property Appraisal, 2007
G2 -	Advanced Income Capitalization, 2007
G3 -	Applied Income Property Valuation, 2007

- **Appraisal Institute**

Advanced Concepts & Case Studies, 2014
General Demonstration Report-Capstone, 2014
General Demonstration Report Writing, 2014
Advanced Internet Search Strategies, 2013
Advanced Sales Comparison & Cost Approaches, 2011
Advanced Income Capitalization, 2010
General Appraiser Report Writing and Case Studies, 2010
General Market Analysis and Highest and Best Use, 2009
Business Practices and Ethics, 2008

- **Confirmed Expert Witness for Real Estate Appraisal**

Mecklenburg County
Cumberland County
Rowan County

AFFILIATIONS AND ACTIVITIES

- South Carolina Certified General Real Estate Appraiser, 2011 to present, License No. 6879
- North Carolina Certified General Real Estate Appraiser, 2009 to present, License No. A7120
- Member Appraisal Institute # 498545
- North Carolina State Registered Trainee, 2006 to 2009, Certificate No. T4475

**RELATED EXPERIENCE**

- **T.B. Harris, Jr. & Associates** Charlotte, North Carolina
July 2009-Present – Appraiser, participating in all aspects of the appraisal process.
- **T.B. Harris, Jr. & Associates** Charlotte, North Carolina
May 2006-June 2009 – Registered trainee, participating in all aspects of the appraisal process.

RESEARCH EXPERIENCE

A partial list of types of properties appraised include:

Apartment Complexes
 Childcare Facilities
 Churches
 Condemnation Cases
 Condominiums (Office and Flex)
 Convenience Stores
 Drugstores
 Fast-Food Restaurants
 Industrial Properties
 Institutional Properties
 Medical Office Properties
 Mini-Storage Facilities
 Mixed-Use Properties
 Office Properties
 Restaurants
 Retail Buildings
 Shopping Centers
 Service Stations
 Takings and Rights-of-Way Acquisitions

Townhouse Complexes
Vacant Land
Veterinary Clinics
Hotels

CLIENTELE

Attorneys, Investors, and Individuals
Bank of America
Bissell Hayes
Branch, Banking & Trust (BB&T)
Catawba Lands Conservancy
Central Carolina Bank
Charlotte Douglas International Airport
Citizens Financial Group, Inc.
City of Charlotte
Duke Energy Company
First Charter Bank
GVA Lat Purser & Associates Incorporated
Lincoln Harris
RBC Centura Bank
Regions Bank
SouthTrust Bank
Statesville Regional Airport
Wachovia Corporation

From: [Brandi Deese](#)
To: [Bjorn Hansen](#); [Cheri Clark](#); mayorpres@aol.com
Subject: RE: Proposed rezoning on Secrest Short Cut
Date: Friday, July 12, 2024 11:00:15 AM
Attachments: [image001.png](#)
[image002.png](#)

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

Good Morning Bjorn –

Thank you for sharing and allowing us to comment. Indian Trail has had multiple conversations with the property owners and various potential buyers due to it being in a doughnut hole area. We provided several options for development of the property (several residential options & light industrial options). The floodplain and utility easements consume most of the lot and the options are limited by those factors regardless of the land use. The Secrest Shortcut Small area plan that the Town and the County adopted calls for this parcel to be medium density residential and open space/environmentally sensitive. The Town of Indian Trail's Comprehensive plan calls for the same as well. The Town of Indian Trail strongly opposes this request and especially with the limited amount of information provided. Thank you!

[Microsoft Word - Secrest Short Cut Road Small Area Plan - Adopted \(10.15.2018\).docx \(indiantrail.org\)](#)

[Comprehensive Town Plan | Indian Trail, NC](#)



Brandi C. Deese, MPA, AICP, CNU-A
Planning Director

Town of Indian Trail
315 Matthews-Indian Trail Road
PO Box 2430
Indian Trail, NC 28079

Office: 704-821-5401
Email: bcd@indiantrail.org
[Development Projects Page](#)

From: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Sent: Wednesday, July 10, 2024 10:28 AM
To: Brandi Deese <bcd@indiantrail.org>; Cheri Clark <cheri.clark@lakeparknc.gov>; mayorpres@aol.com
Subject: RE: Proposed rezoning on Secrest Short Cut

Here are both. One is a JPEG map and the other is a PDF site plan.

Bjorn E. Hansen, AICP CTP

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov
unioncountync.gov

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

From: Brandi Deese bcd@indiantrail.org
Sent: Wednesday, July 10, 2024 10:27 AM
To: Bjorn Hansen bjorn.hansen@unioncountync.gov; Cheri Clark cheri.clark@lakeparknc.gov; mayorpres@aol.com
Subject: RE: Proposed rezoning on Secrest Short Cut

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

Good Morning Bjorn –

The second attachment would not pull up correctly . . . could you resend? Thank you!



Brandi C. Deese, MPA, AICP, CNU-A
Planning Director

Town of Indian Trail
315 Matthews-Indian Trail Road
PO Box 2430
Indian Trail, NC 28079

Office: 704-821-5401
Email: bcd@indiantrail.org
[Development Projects Page](#)

From: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Sent: Tuesday, July 9, 2024 3:26 PM
To: Brandi Deese <bcd@indiantrail.org>; Cheri Clark <cheri.clark@lakeparknc.gov>; mayorpres@aol.com
Subject: Proposed rezoning on Secrest Short Cut

Good afternoon,

We have a proposed flea market and driving school on Secrest Short Cut and want to include municipal comments as part of our staff report. Please let me know what comments you may have by early August.

Thanks,

Bjorn

Bjorn E. Hansen, AICP CTP

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov
unioncountync.gov



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

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

Pursuant to North Carolina General Statutes Chapter 132, Public Records, this electronic mail message and any attachments hereto, as well as any electronic mail message(s) that may be sent in response to it may be considered public record and as such are subject to request and review.

Pursuant to North Carolina General Statutes Chapter 132, Public Records, this electronic mail message and any attachments hereto, as well as any electronic mail message(s) that may be sent in response to it may be considered public record and as such are subject to request and review.

From: [Cheri Clark](#)
To: [Bjorn Hansen](#)
Subject: RE: Proposed rezoning on Secrest Short Cut
Date: Monday, July 22, 2024 3:41:40 PM
Attachments: [image001.png](#)
[image002.png](#)

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

Bjorn,
The Village of Lake Park is not in favor of the rezoning due to traffic concerns.
Kindest Regards,
Cheri Clark
Village Administrator/Clerk
Village of Lake Park
P. O. Box 219
3801 Lake Park Road
Lake Park, NC 28079
(704)882-8657x101

E-mail correspondence to and from this address may be subject to the North Carolina Public Records Law "NCGS.Ch. 132" and may be disclosed to third parties.

From: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Sent: Wednesday, July 10, 2024 11:03 AM
To: Cheri Clark <cheri.clark@lakeparknc.gov>; Brandi Deese <bcd@indiantrail.org>;
mayorpres@aol.com
Subject: RE: Proposed rezoning on Secrest Short Cut

It would be a school for student drivers, so assume teenagers. The configuration for the building has not been determined. That will be a site plan review question. And the S2 (trees and shrubs) screening would be based on a B-4 zoning classification, which is 40' feet front and rear and 20' on the sides. That will be another comment since they are referencing the setback requirements for R-20 (the current zoning) in the lower right corner. They already show sufficient setbacks so the plan won't change based on that comment.

Bjorn E. Hansen, AICP CTP

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov

unioncountync.gov

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

From: Cheri Clark <cheri.clark@lakeparknc.gov>
Sent: Wednesday, July 10, 2024 10:31 AM
To: Bjorn Hansen <bjorn.hansen@unioncountync.gov>; Brandi Deese <bcd@indiantrail.org>;
mayorpres@aol.com
Subject: RE: Proposed rezoning on Secrest Short Cut

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

Bjorn,

Is the Driving School a proposed truck driving school and is the Flea Market open stalls like the one on 74 or enclosed buildings? What type of screening would be involved for the commercial site?

Kindest Regards,

Cheri Clark

Village Administrator/Clerk

Village of Lake Park

P. O. Box 219

3801 Lake Park Road

Lake Park, NC 28079

(704)882-8657

E-mail correspondence to and from this address may be subject to the North Carolina Public Records Law "NCGS.Ch. 132" and may be disclosed to third parties.

From: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Sent: Wednesday, July 10, 2024 10:28 AM
To: Brandi Deese <bcd@indiantrail.org>; Cheri Clark <cheri.clark@lakeparknc.gov>;
mayorpres@aol.com
Subject: RE: Proposed rezoning on Secrest Short Cut

Here are both. One is a JPEG map and the other is a PDF site plan.

Bjorn E. Hansen, AICP CTP

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov
unioncountync.gov

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

From: Brandi Deese bcd@indiantrail.org
Sent: Wednesday, July 10, 2024 10:27 AM
To: Bjorn Hansen bjorn.hansen@unioncountync.gov; Cheri Clark cheri.clark@lakeparknc.gov; mayorpres@aol.com
Subject: RE: Proposed rezoning on Secrest Short Cut

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

Good Morning Bjorn –

The second attachment would not pull up correctly . . . could you resend? Thank you!



Brandi C. Deese, MPA, AICP, CNU-A
Planning Director

Town of Indian Trail
315 Matthews-Indian Trail Road
PO Box 2430
Indian Trail, NC 28079

Office: 704-821-5401
Email: bcd@indiantrail.org
[Development Projects Page](#)

From: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Sent: Tuesday, July 9, 2024 3:26 PM
To: Brandi Deese <bcd@indiantrail.org>; Cheri Clark <cheri.clark@lakeparknc.gov>; mayorpres@aol.com
Subject: Proposed rezoning on Secrest Short Cut

Good afternoon,

We have a proposed flea market and driving school on Secrest Short Cut and want to include municipal comments as part of our staff report. Please let me know what comments you may have by early August.

Thanks,

Bjorn

Bjorn E. Hansen, AICP CTP

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov
unioncountync.gov



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

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

Pursuant to North Carolina General Statutes Chapter 132, Public Records, this electronic mail message and any attachments hereto, as well as any electronic mail message(s) that may be sent in response to it may be considered public record and as such are subject to request and review.

From: [Kevin Pressley](#)
To: [Bjorn Hansen](#); [Cheri Clark](#); [Brandi Deese](#)
Subject: Re: Proposed rezoning on Secrest Short Cut
Date: Wednesday, July 10, 2024 11:43:31 AM
Attachments: [image001.png](#)
[image002.png](#)

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

Bjorn

Thanks for reaching out

We really appreciate your willingness to involve surrounding municipalities for input as it will definitely effect all of us

As far as Hemby Bridge, we have experienced numerous requests for commercial zoning in the past couple of years, which has force the board to draw a hard line against rezoning, especially from residential to commercial located in residential areas

The town would request that the county to deny the rezoning

Thanks again

Kevin

[Sent from the all new AOL app for iOS](#)

On Wednesday, July 10, 2024, 11:03 AM, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

It would be a school for student drivers, so assume teenagers. The configuration for the building has not been determined. That will be a site plan review question. And the S2 (trees and shrubs) screening would be based on a B-4 zoning classification, which is 40' feet front and rear and 20' on the sides. That will be another comment since they are referencing the setback requirements for R-20 (the current zoning) in the lower right corner. They already show sufficient setbacks so the plan won't change based on that comment.

Bjorn E. Hansen, AICP CTP

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov
unioncountync.gov

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

From: Cheri Clark <cheri.clark@lakeparknc.gov>
Sent: Wednesday, July 10, 2024 10:31 AM
To: Bjorn Hansen <bjorn.hansen@unioncountync.gov>; Brandi Deese <bcd@indiantrail.org>; mayorpres@aol.com
Subject: RE: Proposed rezoning on Secrest Short Cut

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

Bjorn,
Is the Driving School a proposed truck driving school and is the Flea Market open stalls like the one on 74 or enclosed buildings? What type of screening would be involved for the commercial site?
Kindest Regards,
Cheri Clark
Village Administrator/Clerk
Village of Lake Park
P. O. Box 219
3801 Lake Park Road
Lake Park, NC 28079
(704)882-8657

E-mail correspondence to and from this address may be subject to the North Carolina Public Records Law "NCGS.Ch. 132" and may be disclosed to third parties.

From: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Sent: Wednesday, July 10, 2024 10:28 AM
To: Brandi Deese <bcd@indiantrail.org>; Cheri Clark <cheri.clark@lakeparknc.gov>; mayorpres@aol.com
Subject: RE: Proposed rezoning on Secrest Short Cut

Here are both. One is a JPEG map and the other is a PDF site plan.

Bjorn E. Hansen, AICP CTP

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov
unioncountync.gov

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

From: Brandi Deese bcd@indiantrail.org
Sent: Wednesday, July 10, 2024 10:27 AM
To: Bjorn Hansen bjorn.hansen@unioncountync.gov; Cheri Clark cheri.clark@lakeparknc.gov; mayorpres@aol.com
Subject: RE: Proposed rezoning on Secrest Short Cut

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

Good Morning Bjorn –

The second attachment would not pull up correctly . . . could you resend? Thank you!



Brandi C. Deese, MPA, AICP, CNU-A
Planning Director

Town of Indian Trail
315 Matthews-Indian Trail Road
PO Box 2430
Indian Trail, NC 28079

Office: 704-821-5401
Email: bcd@indiantrail.org
[Development Projects Page](#)

From: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Sent: Tuesday, July 9, 2024 3:26 PM
To: Brandi Deese <bcd@indiantrail.org>; Cheri Clark <cheri.clark@lakeparknc.gov>; mayorpres@aol.com
Subject: Proposed rezoning on Secrest Short Cut

Good afternoon,

We have a proposed flea market and driving school on Secrest Short Cut and want to include municipal comments as part of our staff report. Please let me know what comments you may have by early August.

Thanks,

Bjorn

Bjorn E. Hansen, AICP CTP

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov
unioncountync.gov



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

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

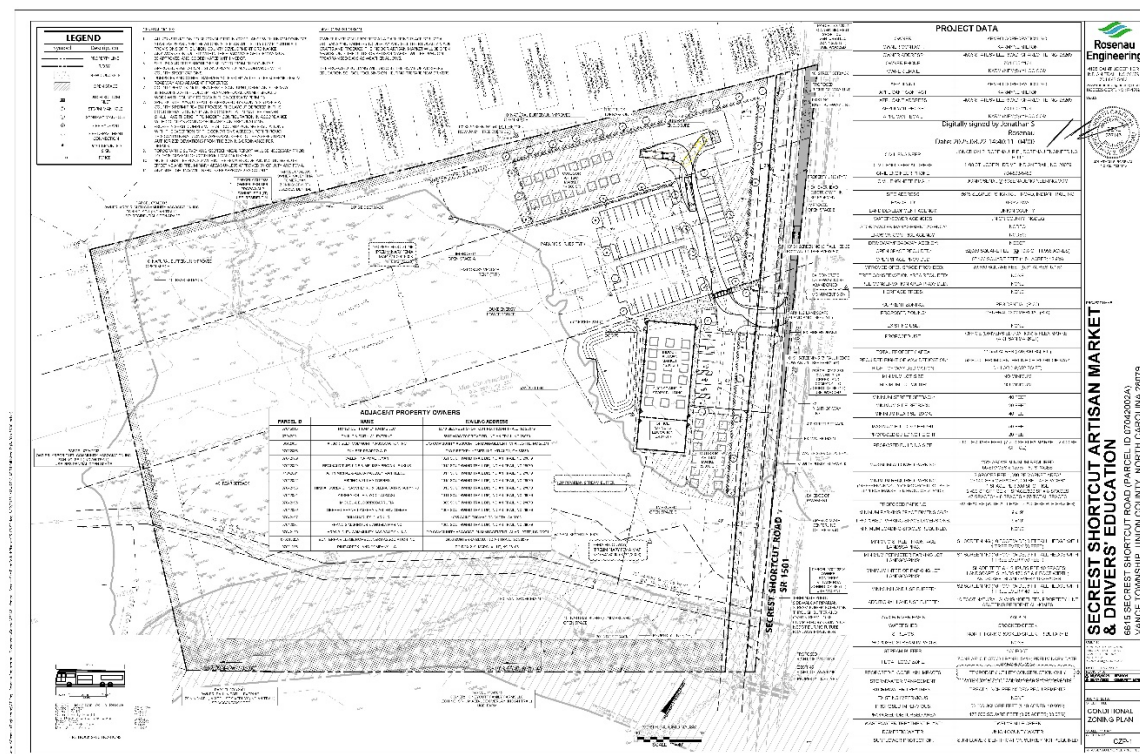
Pursuant to North Carolina General Statutes Chapter 132, Public Records, this electronic mail message and any attachments hereto, as well as any electronic mail message(s) that may be sent in response to it may be considered public record and as such are subject to request and review.

Planning Staff Report - Rezoning Case # CZ-2024-005
Staff Contact: Bjorn Hansen, Senior Planner

Summary of Request

This case is requesting a revision of the Union County Zoning Map by rezoning one parcel totaling 11.958 acres outside of road right of way appearing on the tax map as tax parcel 07-042-002A along Secrest Short Cut Road from R-20 to B-4 with Conditions. The flea market incorporated a special use permit approval as part of this rezoning. The rezoning will include the following conditions:

- 1) Limited to site plan dated August 17, 2025
- 2) Uses limited to flea market and driving school
- 3) Owner will construct improvements to Secrest Short Cut as required by NCDOT
- 4) Five-year vesting of development rights
- 5) Development will meet all requirements of the Union County Unified Development Ordinance as of the date of approval



Owner/Applicant

Owner: Matt Construction, Inc.
4506 Statesville Road
Charlotte, NC 28269

Applicant: Karmyne Milton
1420 Rama Road
Charlotte, NC 28211

Property Information

Location: On the southwest corner of Secrest Shortcut Road and Southwind Trail Drive. Location more specifically described as tax parcel 07-042-002A.



Municipal Proximity: The site is surrounded by Indian Trail.

Existing Land Use and Development Status: The parcel is currently zoned R-20. The site is partially cleared near the road, with the remainder in the floodplain and forested.

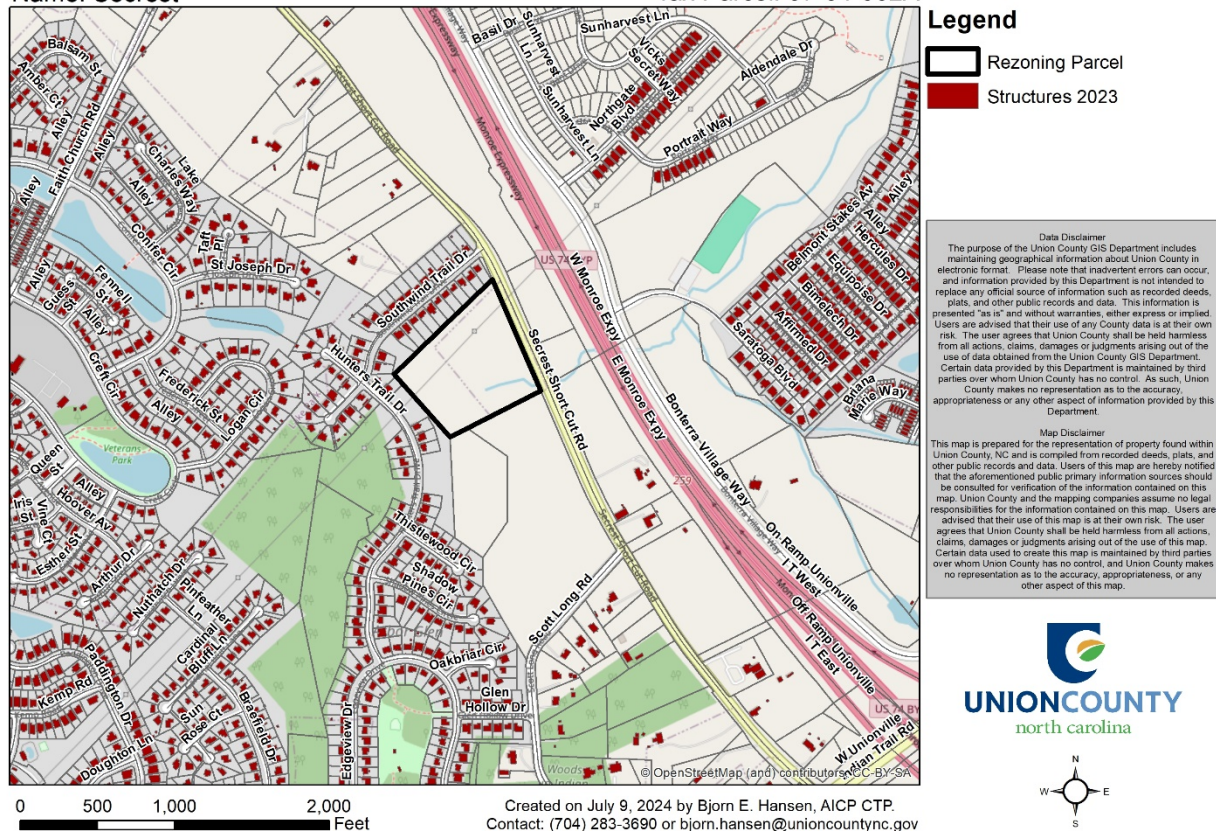
Development Status

Petition: 2024-CZ-005

Name: Secrest

Size: 12.398 acres

Tax Parcel: 07-04-002A



Environmental Features: There is a stream and significant amount of floodplain on the site. The current flood plain is shown on the following map, but the proposed updated floodplain will slightly expand the impacted area on the site. The proposed layout accommodates the new floodplain. Secrest Shortcut Road has been closed for flooding four times since 2018.

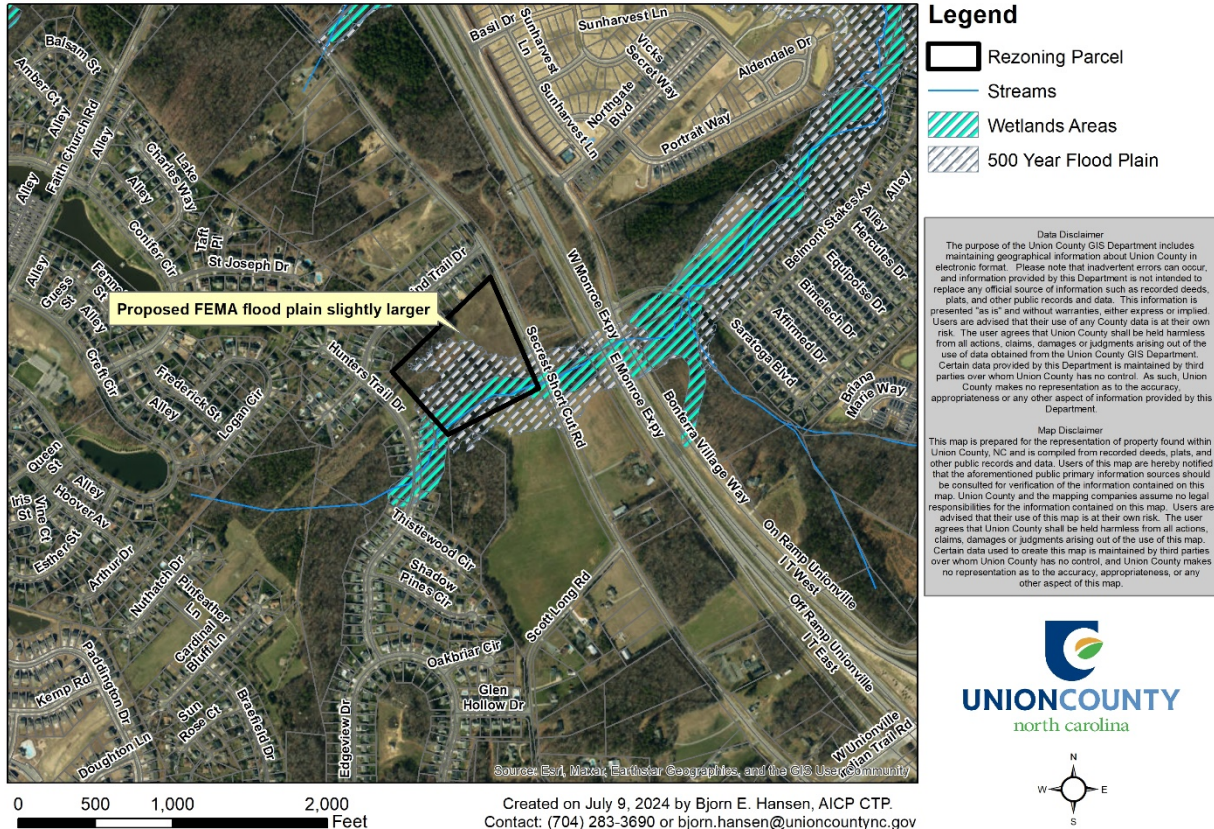
Environmental Features

Petition: 2024-CZ-005

Name: Secrest

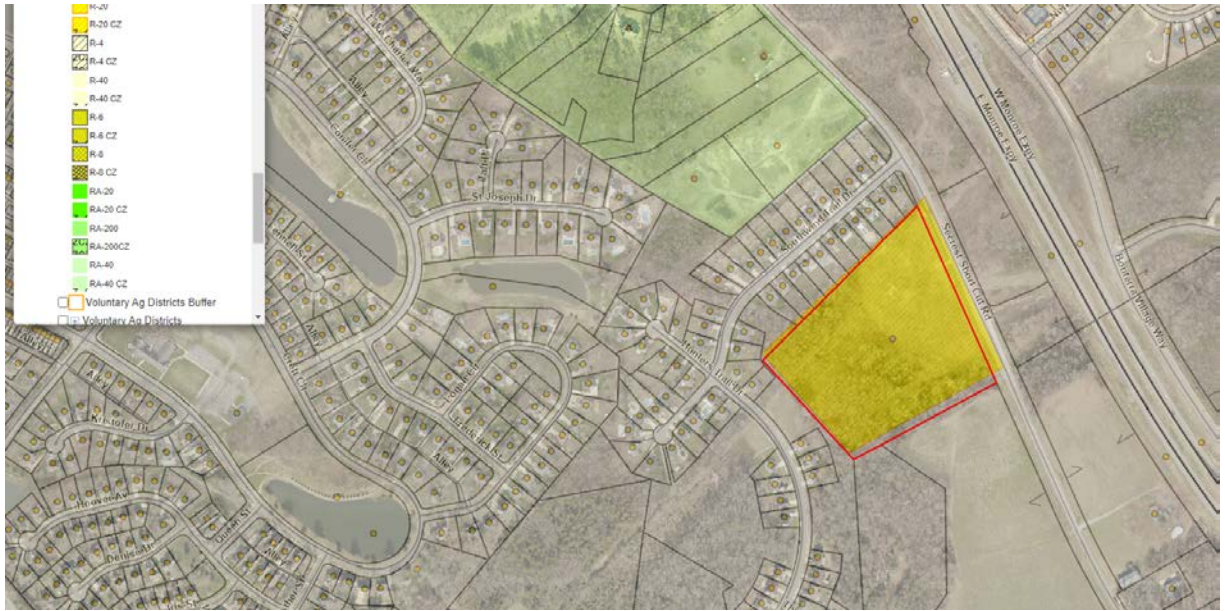
Size: 12.398 acres

Tax Parcel: 07-04-002A



Utilities: The development will utilize Union County water and sewer service.

Zoning and Land Use History: The parcel site has been zoned R-20 since zoning was initiated in Union County. Since most development in the area has occurred inside Indian Trail, there have been few actions by Union County. There currently is a proposed rezoning to Light Industrial approximately a half mile to the north at the corner of Faith Church and Secrest Short Cut. That proposed development is inside Hemby Bridge, meaning Union County is processing the rezoning.



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

Transportation: This site will have access from Secrest Short Cut Road. The road already includes a left turn lane, so no additional road improvements would be required as a result of this rezoning and development. Due to the variability of flea markets, it is difficult to predict traffic generation by this type of use. There is no established rate for this land use in the Institute of Transportation Engineers (ITE) trip generation manual. These types of uses have peak generation on weekends, meaning weekday impacts are minimal. The associated driver school would likewise have a small traffic impact.

Secrest Short Cut Road carries approximately 11,500 vehicles per day in 2023, up from a COVID era 9,100 vehicles per day shown in the following map. There are no funded road improvements in the vicinity of the proposed rezoning.

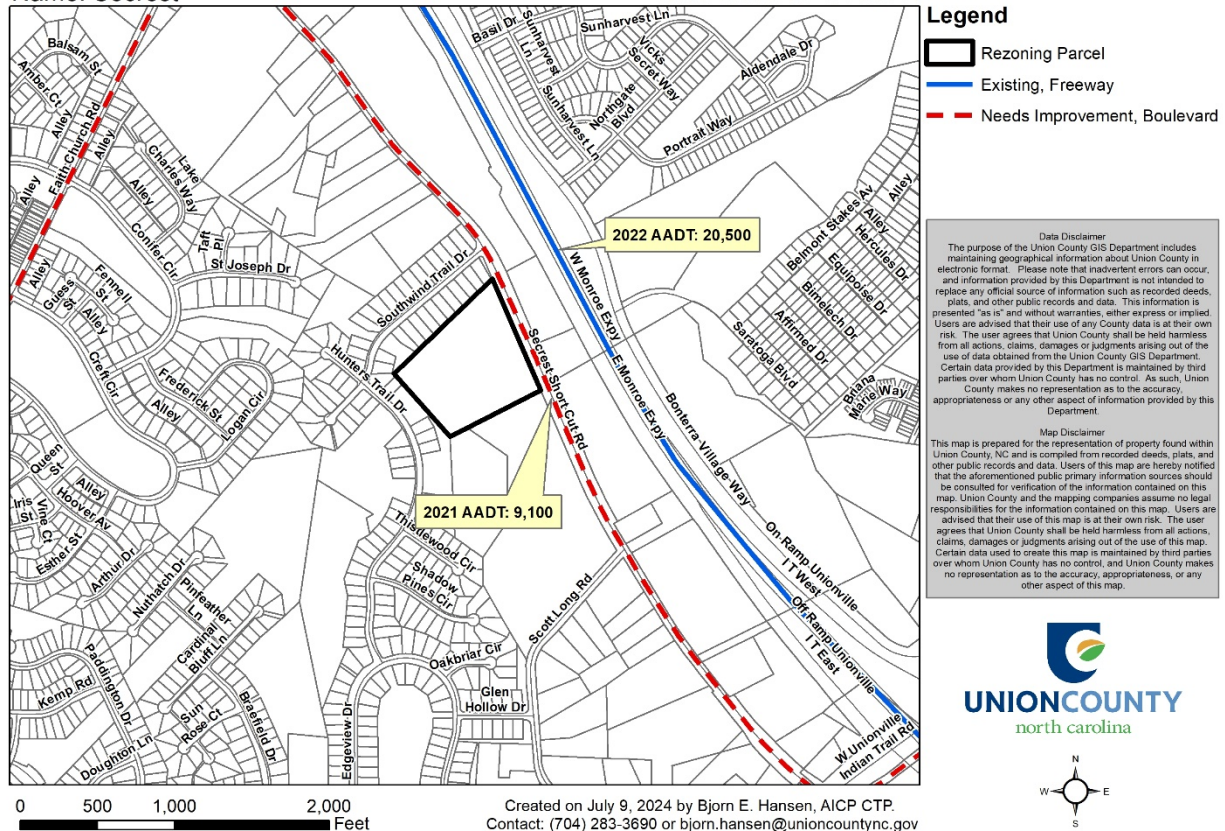
Transportation

Petition: 2024-CZ-005

Name: Secret

Size: 12.398 acres

Tax Parcel: 07-04-002A



Planning Documents

Union County Comprehensive Plan: The Union County 2050 comprehensive plan identifies this area as an Employment Corridor overlaid upon a Transition Zone. The proposed retail and service uses are therefore considered appropriate, although the amount of retail should be limited due to traffic impacts along the corridor. The flea market uses proposed under B-4 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.

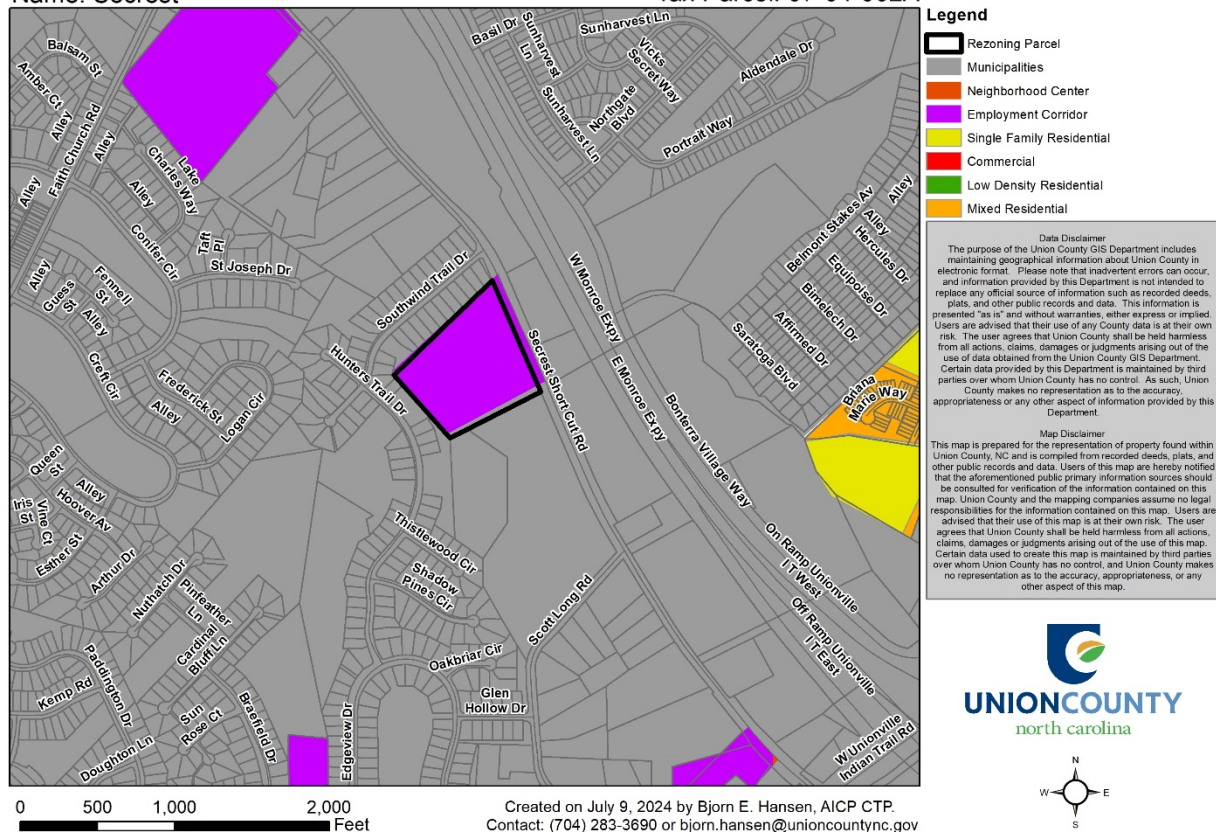
Land Use Map

Petition: 2024-CZ-005

Name: Secrest

Size: 12.398 acres

Tax Parcel: 07-04-002A



Public and Municipal Comments

Public Comments: A community meeting was held July 31, 2025. Eleven residents attended and had questions and concerns over buffering, business plan for flea market, proximity of driveway to nearby neighborhoods, and flooding on Secrest Short Cut Road.

One resident spoke at the October 21, 2025, Land Use Board meeting. They expressed concern over noise and traffic impacts.

Municipal Comments: Indian Trail, Hemby Bridge, and Lake Park were consulted and had the following comments:

Indian Trail: Indian Trail has had multiple conversations with the property owners and various potential buyers due to it being in a doughnut hole area. We provided several options for development of the property (several residential options & light industrial options). The floodplain and utility easements consume most of the lot and the options are limited by those factors regardless of the land use. The Secret Shortcut Small area plan that the Town and the County adopted calls for this parcel to be medium density residential and open space/environmentally sensitive. The Town of Indian Trail's Comprehensive plan calls for the same as well. The Town of Indian Trail strongly opposes this request and especially with the limited amount of information provided.

Hemby Bridge: We really appreciate your willingness to involve surrounding municipalities for input as it will definitely affect all of us. As far as Hemby Bridge, we have experienced numerous requests for commercial zoning in the past couple of years, which has forced the board to draw a hard line against rezoning, especially from residential to commercial located in residential areas. The town would request that the county to deny the rezoning.

Lake Park: The Village of Lake Park is not in favor of the rezoning due to traffic concerns.

Land Use Board Recommendation

The Land Use Board reviewed this proposal and recommended denial on a 5-1 vote its October 21, 2025, meeting, citing flooding concerns and proximity to residential areas.

Staff Comments and Recommendation

This part of Union County is identified for employment uses as an Employment Corridor overlay over a Transition Zone. Because this is a non-residential request, the Employment Corridor recommendations apply. Employment Corridors have access to transportation infrastructure such as railways, airports and major roads, and have available land with close proximity to similar uses. Employment Corridors connect employment nodes and other large job centers throughout the County and neighboring counties. A variety of employment uses may be appropriate along these corridors. The proposed retail uses are appropriate in limited frequency, and the driving school is appropriate within the overlay. The proposed site plan meets the requirements of the Unified Development Ordinance and the uses are consistent with the adopted plan. **Because of these aspects of the development, staff recommend approval of this rezoning application.**

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 deny the rezoning petition (CZ-2024-005) submitted by Karmyne Milton, requesting a revision of the Union County Zoning Map by rezoning one parcel totaling 11.958 acres appearing on the tax map as tax parcel 07-042-002A along Secrest Short Cut Road from R-20 to B-4 with Conditions.

CONSISTENCY AND REASONABLENESS STATEMENT FOR APPROVAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN) (CZ-2024-005)

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

1. The proposed use is consistent with the Plan. The Plan’s Land Use Map identifies this area as in an Employment Corridor. The Plan provides that a variety of employment uses may be appropriate along an Employment Corridor. Dependent on location and adjacent facilities, the Plan sets forth that development uses that may be appropriate include distribution, logistics, aeronautics, industrial and agri-business. Retail uses, while not specifically listed in the non-exhaustive list of potential uses in the Employment Corridor overlay, would be complementary with other employment uses and consistent with the uses contemplated in an Employment Corridor in the Plan.
2. Flea markets are allowed in this district with a special use permit. The applicant has included all information required for special use approval with the conditional zoning map amendment application, in accordance with Section 80.050-G(3) of the Unified Development Ordinance of Union County, North Carolina.
3. The use will increase business opportunities and business and economic development in Union County, which is a goal of 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-2024-005)**

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

1. Although the proposed use is in an Employment Corridor as identified on the Plan’s Land Use Map, the Plan identifies certain examples of employment uses that may be appropriate in an Employment Corridor. These examples of employment uses that may be appropriate include distribution, logistics, aeronautics, industrial, and agri-businesses. The particular retail use proposed here is materially different from, and inconsistent with, the types of uses contemplated in the Employment Corridor.
2. The proposed use will increase traffic along Secrest Short Cut Road. Traffic congestion is a noted concern in the Plan.
3. The commercial uses are immediately adjacent to existing residential uses, with a commercial use being of a markedly different character from these immediately adjacent existing uses.

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-2024-005) submitted by Karmyne Milton (the “Applicant”), requesting a revision of the Union County Zoning Map by rezoning one parcel totaling 11.958 acres appearing on the tax map as tax parcel 07-042-002A along Secrest Short Cut Road from R-20 to B-4 with Conditions.

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 R-20 to B-4 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 07-042-002A in the Vance Township from R-20 to B-4 with Conditions.
2. The conditions accepted by the Applicant are hereby approved and incorporated into the B-4 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 #: 25-686

Agenda Date: 11/17/2025

TITLE:

Public Hearing - Rezoning Petition RZ-2025-010 Haney

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 case is requesting to rezone one parcel totaling 0.51 acres appearing on the tax map as tax parcel 091-31-001 located on Pageland Highway from RA-40 to HC (Highway Corridor). The rezoning request is a "straight" rezoning, so there are no conditions associated with this request.

The Land Use Board evaluated this proposal at its October 21 meeting and recommended approval on a 5-1 vote, citing consistency with the land use map.

If the Board of Commissioners wishes to make a decision on the rezoning petition, it can consider the following motions.

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

Motion

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

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

Motion

- (i) Deny rezoning petition RZ-2025-010 from Mike Haney; and (ii) adopt the consistency and reasonableness statement for denial.

FINANCIAL IMPACT:

None.

Application for Straight 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 2916 Pageland Hwy City Monroe State NC Zip 28110

Tax Parcel ID 091 31 001 Current Zoning Designation RA40 Total Acres .51

Proposed Zoning Designation Highway Corridor Date Submitted 9/23/2025

Project Description or Intent of Rezoning

rezoning request is to allow for a self-storage facility.

Contact Information

Applicant Name Mike Haney

Address 1000 Datar Lane City Indian Trail State NC Zip 28079

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

Property Owner Name McKagney Investments, LLC

Address Same as appicate information City [REDACTED] State [REDACTED] Zip [REDACTED]

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

Applicant's Certification

[Signature]
Signature

9/23/2025

Date

Mike Haney/ Owner

Printed Name/Title

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

[Signature]
Signature

9/23/2025

Date

Mike Haney/ Owner

Printed Name/Title

Union County Office Use Only:

Case Number: 2025-RZ-010 Date Received: 9-24-25

Amount of Fee (\$600): BEA Fee Ok: BEA Received by: BEA

Contact: Bjorn Hansen T. 704.283.3690 E. Bjorn.Hansen@unioncountync.gov

Letter of Intent

Date: September 23, 2025

To: Union County Planning Department
Reference: Straight Rezoning Request
2916 Pageland Hwy, Monroe NC 28110
Parcel # 091 31 001

My name is Michael Haney and I'm a long-time resident of Union County. I've recently acquired the .51-acre Pageland Highway parcel with the intention of developing a self-storage facility.

This parcel is currently zoned RA 40 and I'm requesting a straight rezoning to Highway Corridor (HC). Zoning HC appears to be consistent with the intended use fronting highway 601 (Pageland Hwy).

Sincerely,
Mike Haney
704-497-6619

Planning Staff Report - Rezoning Case # RZ-2025-010

Staff Contact: Bjorn Hansen, Senior Planner

Summary of Request

This case is requesting to rezone one parcel totaling 0.51 acres appearing on the tax map as tax parcel 09-131-001 located on Pageland Highway from RA-40 to Highway Corridor. The rezoning request is a straight rezoning, so there are no conditions associated with this request.

Owner/Applicant

Owner: McKagney Investments, LLC
1000 Dataw Lane
Indian Trail, NC 28079

Applicant: Mike Haney
1000 Dataw Lane
Indian Trail, NC 28079

Property Information

Location: On the west side of Pageland Highway south of Eudy Road. Location more specifically described as tax parcel 09-131-001.



Municipal Proximity: The site is nearly a mile south of the City of Monroe.

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

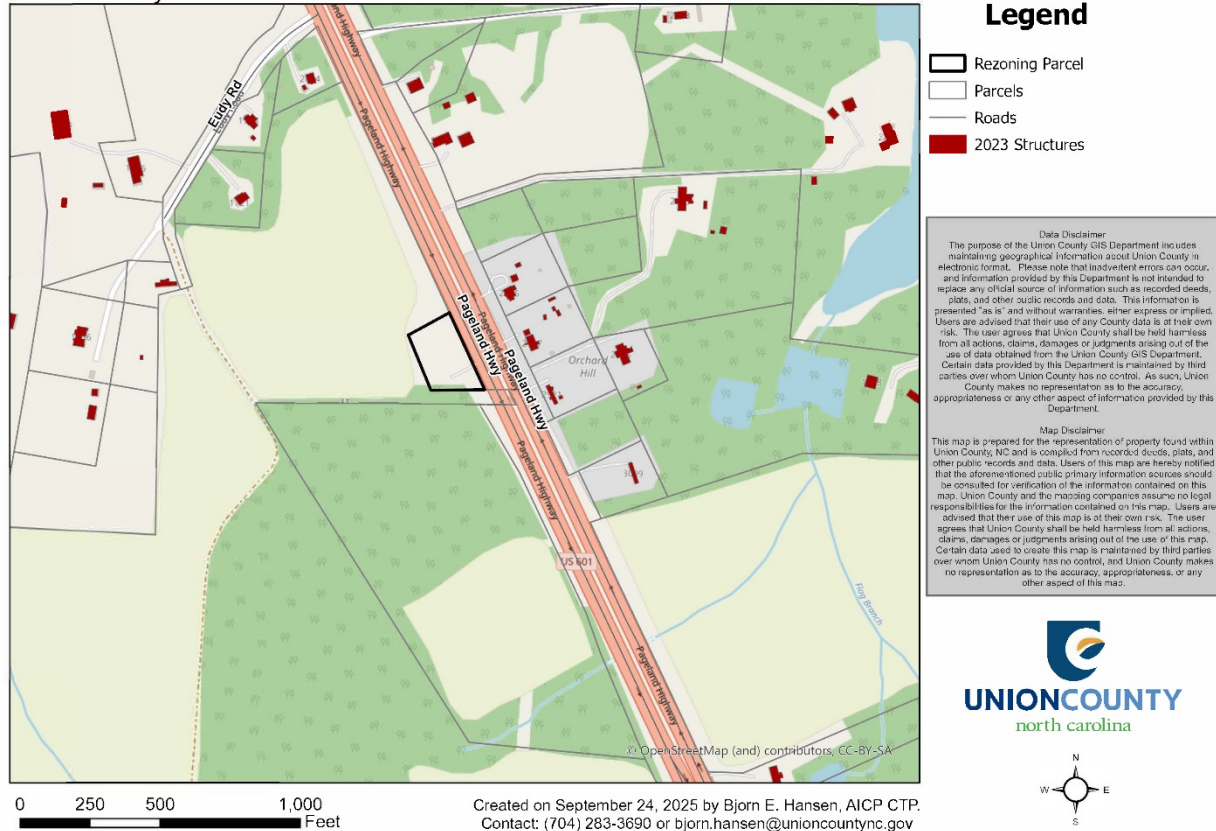
Development Status

Petition: 2025-RZ-010

Name: Haney

Size: 0.51 acres

Tax Parcel: 09-131-001



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

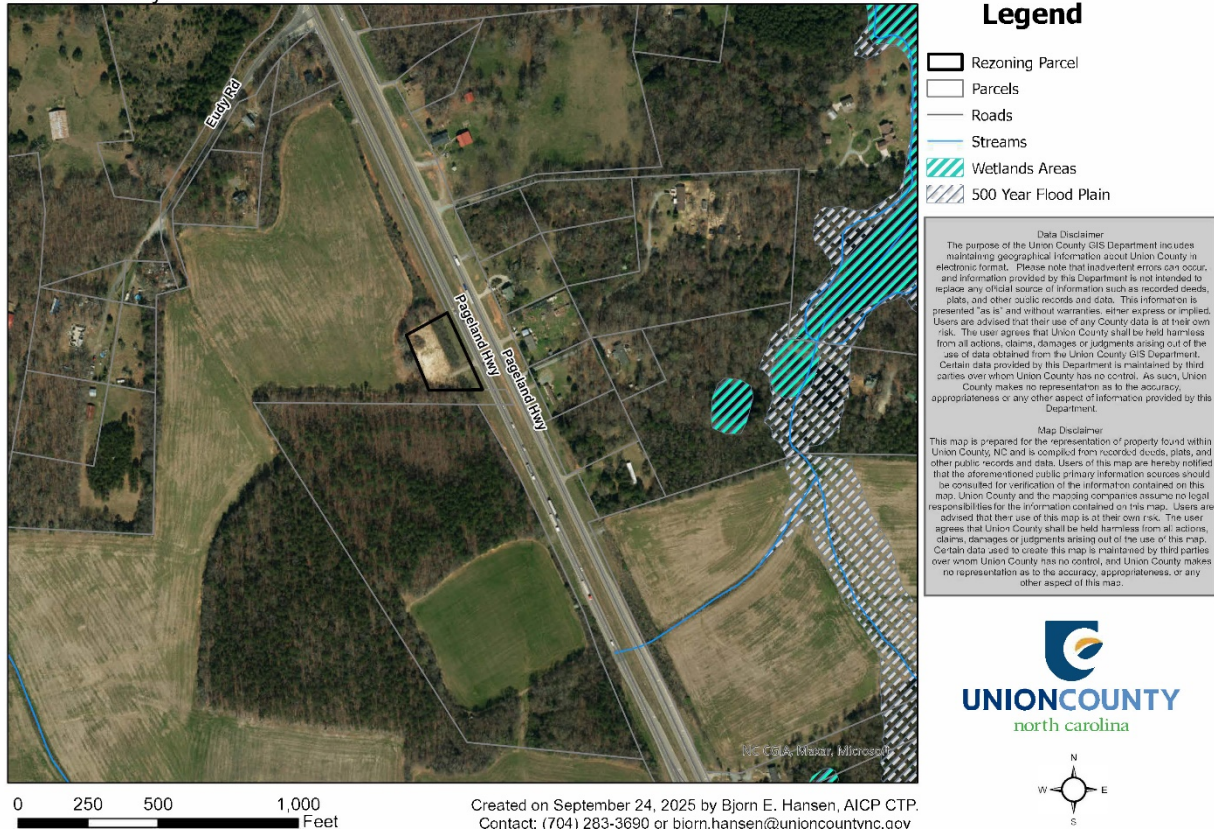
Environmental Features

Petition: 2025-RZ-010

Name: Haney

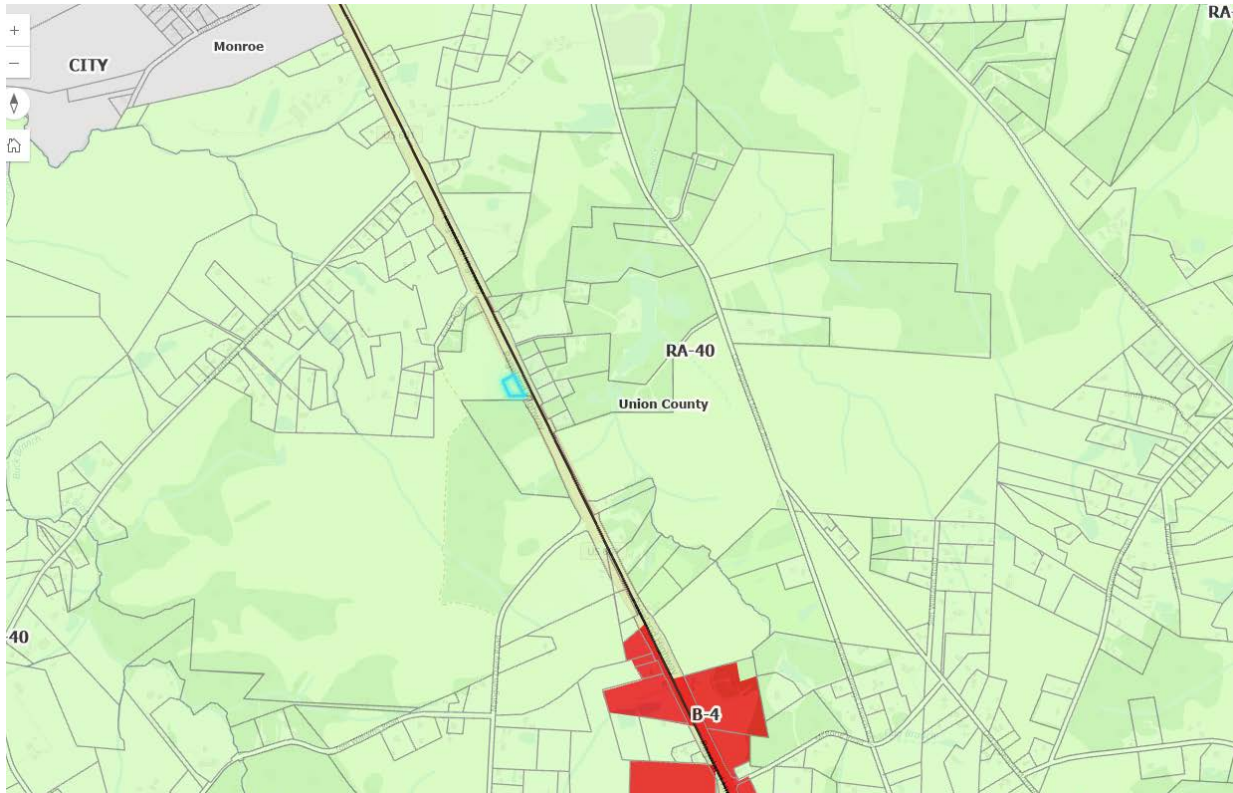
Size: 0.51 acres

Tax Parcel: 09-131-001



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 one half mile north was proposed for rezoning to B-4 in 1989, but was denied. A 6.391 acre site approximately 2/3 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 1,000 feet north 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 (TIA) was not required for this rezoning. Because there are no proposed uses with the rezoning, staff are unable to assess impacts on the corridor.

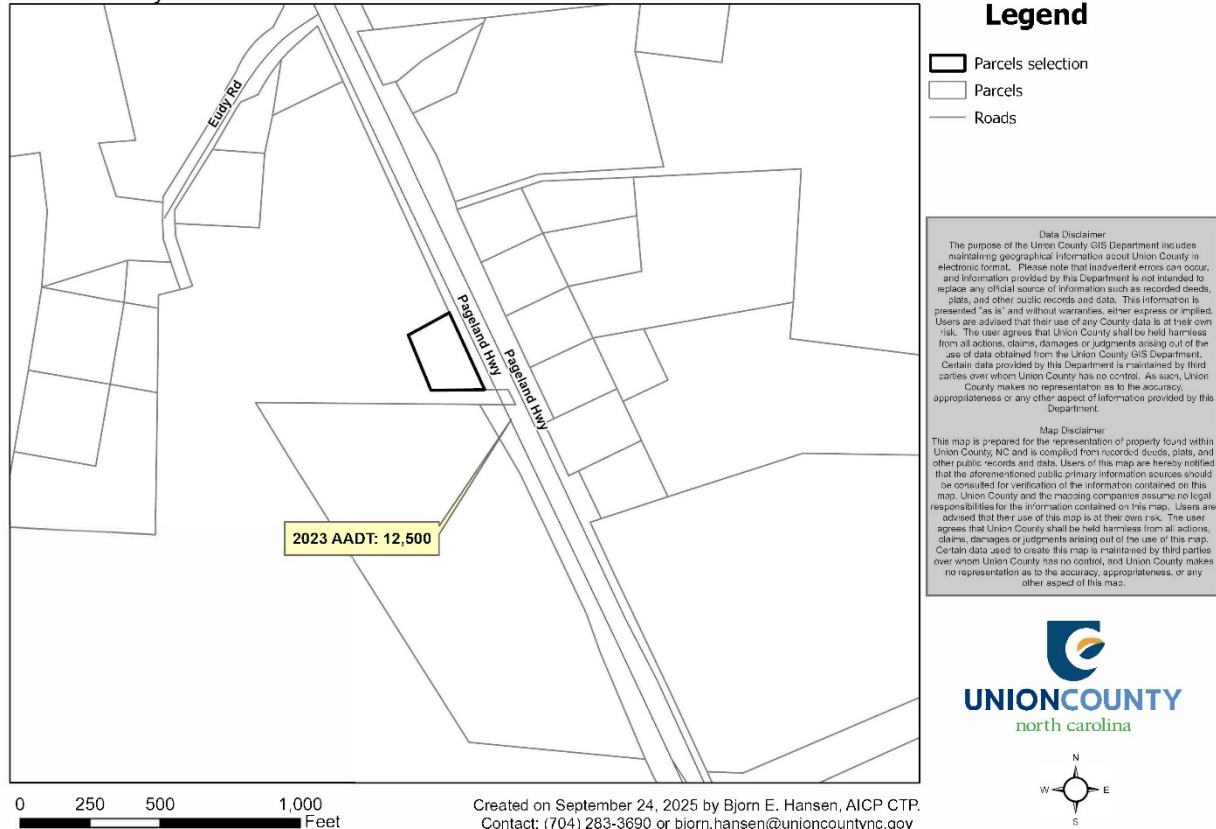
Transportation

Petition: 2025-RZ-010

Name: Haney

Size: 0.51 acres

Tax Parcel: 09-131-001



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 zoning district is therefore considered appropriate, although the small size of the site could result in strip development if duplicated along the corridor. A lack of utilities may mean that the site cannot be fully utilized with a significant number of employees or customers.

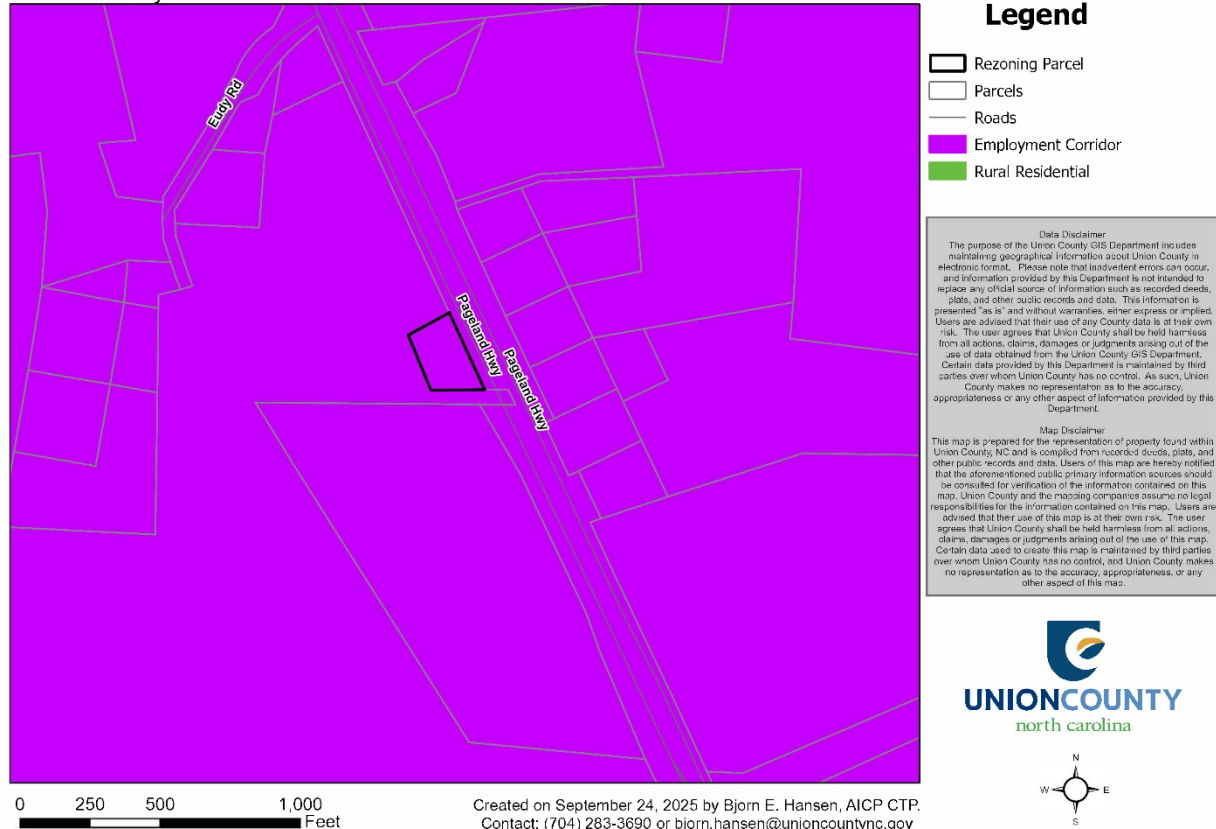
Land Use Map

Petition: 2025-RZ-010

Name: Haney

Size: 0.51 acres

Tax Parcel: 09-131-001



Public and Municipal Comments

Public Comments: A community meeting was not required since this is not a conditional rezoning request. No one spoke at the October 21 Land Use Board meeting.

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

Land Use Board Recommendation

The Land Use Board evaluated this rezoning request at its October 21, 2025, meeting. The Board recommended approval on a 5-1 vote, citing consistency with the land use map.

Staff Comments and Recommendation

This part of Union County is identified for employment uses as an overlay over rural residential and agricultural land uses. Because this is a straight rezoning request, all potential uses must be considered when making a recommendation. The small size of the parcel, lack of utilities, plus recent stormwater detention requirements result in reduced available land even before considering significant buffer and setback requirements as a percentage of the overall parcel. Any use with employees or customers would require bathrooms, necessitating septic and well being located on site, which means uses without employees may be the most appropriate uses on site. US 601 is a high-speed multi-lane corridor, and having multiple small commercial properties along the corridor, each with their own driveway, could result in an unattractive stripped environment that would reduce the utility of the highway and be inconsistent with the Employment Corridor designation. Because of these aspects of the development, staff recommend **denial** of this rezoning application.

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 (RZ-2025-010) submitted by Mike Haney, requesting a revision of the Union County Zoning Map by rezoning one parcel totaling approximately 0.51 acres appearing on the tax map as tax parcel 09-131-001 along US 601 from RA-40 to Highway Corridor (HC).

CONSISTENCY AND REASONABLENESS STATEMENT FOR APPROVAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN) (RZ-2025-010)

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 Highway Corridor would allow for many of these development uses contemplated for an Employment Corridor under the Plan..
2. The benefits to the community at large, the neighbors, and the property owners of the proposed rezoning outweigh any detriments to the neighbors and others caused by the rezoning. The benefits of this rezoning include potentially allowing for increased employment or business uses for the surrounding community to utilize, as well as developing an area designated in the Plan for development along a significant transportation corridor in the County. The potential detriments of the use established by this rezoning could include increased noise, light, and traffic exposure, as well as increased public services impacts.

**CONSISTENCY AND REASONABLENESS STATEMENT FOR DENIAL OF THE
PROPOSED AMENDMENT (THE PROPOSAL IS INCONSISTENT WITH THE
CURRENT PLAN) (RZ-2025-010)**

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

1. Future allowed commercial use on the property under certain uses allowed in Highway Corridor districts could result in increased congestion on the roads and streets adjacent and nearby to the property. Traffic congestion is a noted concern in the Plan.
2. Certain uses allowed in a Highway Corridor zoning district are not employment uses that are contemplated uses in an Employment Corridor as identified in the Plan.
3. 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 RZ-2025-010 submitted by Mike Haney, requesting a revision of the Union County Zoning Map by rezoning one parcel totaling approximately 0.51 acres appearing on the tax map as tax parcel 09-131-001 along US 601 from RA-40 to Highway Corridor (HC); 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-40 to Highway Corridor (HC) 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 09-131-001 along US 601 from RA-40 to Highway Corridor (HC).
2. 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 #: 25-692

Agenda Date: 11/17/2025

TITLE:

Public Hearing - Union County Rural Land Use Plan and Land Use Map Amendments

INFORMATION CONTACT:

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

ACTION REQUESTED:

Conduct public hearing for plan adoption and Land Use Map amendments.

PRIOR BOARD ACTIONS:

- 1) May 6, 2024, Regular Meeting, Agenda Item # 24-289 - Authorize staff to apply for Green Growth Toolkit grant.
- 2) March 17, 2025, Regular Meeting, Agenda Item # 25-071 - Receive update on vision statement.
- 3) August 11, 2025, Regular Meeting, Agenda Item #25-483 - Receive update on draft strategies

BACKGROUND:

The steering committee has completed its work in developing a land use plan for the rural parts of Union County. The draft report summarizes the work of the committee, including its strategy recommendations, which are below:

- Expand agricultural easement purchase program
- Require contiguous areas for open space in major subdivisions
- Express concern over impacts from bypasses
- Limit major subdivisions in certain zoning districts
- Expand rural area in Land Use Map
- Add six rural centers to the Land Use Map
- Flexibility for commercial uses in rural areas
- Provide options for smaller developments impacted by open space requirements
- Create a conservation development brochure

The Soil and Water Conservation District and Land Use Board both reviewed and recommend the plan as submitted.

A total of two comments have been received from the public. Both noted concern over impacts of growth and transportation projects on rural character and agriculture.

FINANCIAL IMPACT:

There are no impacts from the plan adoption.



Rural Land Use Plan



Table of Contents

1. List of Figures and Tables.....	2
2. Thanks and Acknowledgements.....	3
3. Executive Summary.....	4
4. Union County 2050 and Rural Planning.....	5
5. Rural Union County	
a. Development Pressure.....	7
b. Agriculture.....	9
6. Field Research	
a. Catawba Lands Conservancy	11
b. NC Wildlife Resources Commission.....	17
7. Visioning Process.....	19
8. Strategy Development.....	21
9. Strategy Recommendations.....	25
10. Conservation Strategies and Funding Sources.....	28
11. Adoption.....	31
12. Conclusion.....	32

List of Figures

Figure 1: Union County Land use map.....	5
Figure 2: Union County development projects map.....	7
Figure 3: Union County minor subdivision dashboard.....	8
Figure 4: Photograph of agricultural land.....	8
Figure 5: Photograph of logged timber.....	9
Figure 6: Photograph of recently planted agricultural land.....	9
Figure 7: Map of priority environmental and agricultural land.....	12
Figure 8: Map of Significant Natural Areas.....	14
Figure 9: Photograph of natural forested area.....	17
Figure 10: Photograph of Monarch butterfly.....	17
Figure 11: Plan outreach flyer.....	19
Figure 12: Strategy outreach StoryMap.....	21
Figure 13: Map of bypasses and expanded rural area.....	23
Figure 14: Photograph of steering committee chairman Allan Baucom.....	24

List of Tables

Table 1: Natural resources score matrix.....	13
Table 2: List of natural areas.....	14
Table 3: Weight each metric provided for the farmland score.....	15

Thanks and Acknowledgements

The Union County Rural Land Use Plan is the result of many years of effort in helping preserve the essential aspects of Union County while guiding growth into the future. The process started in 2019 with the initiation of the Union County 2050 Comprehensive Plan. One of the recommendations was to create a rural land use plan for the half of Union County designated as rural. This plan is a result of that process.

The Union County Board of Commissioners directed staff to initiate the process in early 2024, and Union County was awarded a \$10,000 grant through the North Carolina Wildlife Resources Commission's Green Growth Toolbox Program. This program provides support for local government planning projects that consider wildlife and natural resource conservation in land use and development planning, incentives and ordinances. Union County matched this grant with \$10,000 to contract with the Catawba Lands Conservancy to provide technical assistance in analyzing Union County's agricultural and environmental resources to help focus conservation efforts. Staff from the Commission and Conservancy were instrumental in helping ensure the Plan's recommendations incorporated best practices for protecting agricultural lands and natural resources.

Finally, Union County benefited from the insight and experience of County residents who served on the steering committee or provided comments during the Plan's development.

Board of County Commissioners

Melissa Merrell, Chair
Brian Helms, Vice-Chair
Clancy Baucom
Christina Helms
Gary Sides

Land Use Board

Darren Green, Chair
Rick Davis, Vice-Chair
Lawrence Britt
Charles Walkup, Jr.
Douglas McClew
Mark Tilley
Derrick Austin
David Brooks

Steering Committee

Allan Baucom, Chair
James Austin, Vice-chair
Danyelle Crum
Mick Noel
Nick Long
Jared Steele
Laura Varela

Staff

Lee Jenson, Planning Director
Bjorn Hansen, Long Range Planner
Jim King, Zoning Administrator
Dr. Keith O'Herrin, PhD, Urban Forester
Alan Aldridge, Soil and Water
Conservation District Director
Andrew Baucom, County Extension
Director



Executive Summary

Union County has added an average of more than 5,000 people per year for the past quarter-century. This development pressure is projected to continue into the future as well as continue to expand from the Charlotte urbanized area into the more rural areas, placing pressure on environmental resources, rural character, and agricultural operations. Previously adopted plans identified many goals and aspirations for protecting agriculture and controlling growth, but few substantial actions had been taken. In the past two years Union County has initiated an agricultural development easement purchase program, requiring 30% open space for major subdivisions in rural areas, and expressing concern over development pressure in the rural area due to proposed roads south of Waxhaw, Marshville, and Monroe. The Union County Rural Land Use Plan was proposed in early 2024 to identify ways to provide flexibility to property owners while protecting the environment, rural character, and agricultural operations into the future.

In partnership with the Catawba Lands Conservancy, Union County Soil and Water Conservation District, NC State Agricultural Extension Office, and NC Wildlife Resources Commission, the Union County Planning Department led the development of this plan, starting in October 2024 with the first meeting of the seven-member steering committee. Public engagement was a key part of the process. All committee meetings were open to the public, and two rounds of public engagement ensured that what the committee adopted included significant public review. This committee developed a vision statement that was reviewed by over 200 Union County residents and followed up with a series of strategies that was reviewed by over 160 residents.

The Union County Rural Land Use Plan includes a series of strategies that would permanently protect 10% of all agricultural land in Union County by 2050, limit impacts of large-scale residential development, reduce development pressures, and provide additional flexibility for property owners. The most impactful strategy – significantly increasing the agricultural easement purchase program – would require adding several million tax dollars per year. The recommended funding source would require a successful public referendum be implemented, meaning voters would decide whether this strategy is worth the cost.

This Plan represents a year's worth of work between Union County and outside agency staff, the steering committee, and the hundreds of Union County residents who asked to be kept apprised of progress as this plan was developed. The recommendations propose concrete steps to influence the drivers of development pressure, be good stewards of the land, protect rural character, and respect property rights.

Union County 2050

A comprehensive plan is the official adopted statement for future development of a community. Union County 2050 analyzed existing conditions and emerging trends in the County, describes the process for gathering public input on future goals, establishes a vision for future development, and outlines steps for achieving that vision. The adopted vision is below

Union County in 2050 is a place defined by connections, where local governments work together on targeted issues. There are clearly communicated plans for growth and infrastructure improvements, and resources are committed to their implementation.

Union County is a growing community where there is:

- *Increased capacity to address education, transportation, water, public safety, and other multi-jurisdictional issues*
- *High-density residential, retail and employment options in designated areas*
- *Convenient accessibility between retail, residential, and employment land uses*
- *Complementary development patterns along corridors*
- *Preserved rural character outside of water and sewer coverage areas*
- *Recognition and support of agriculture as a key industry*
- *Enhanced community connections for arts, agri-tourism, and parks and recreation*

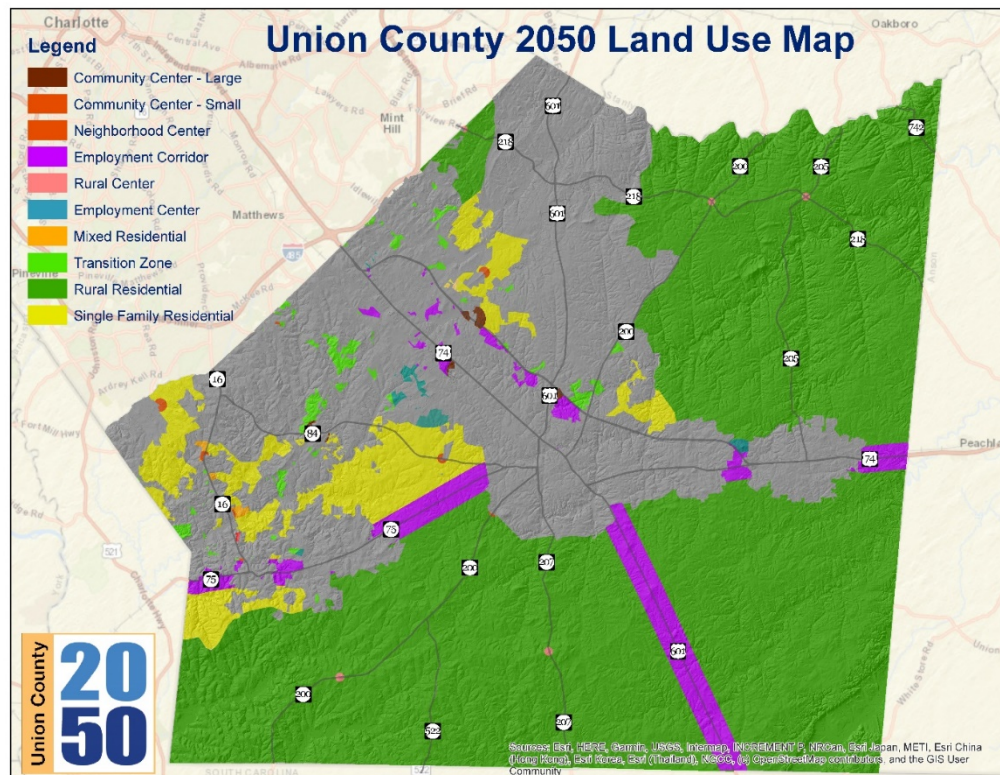


FIGURE 1

The Plan serves as foundation for making land use and public investment decisions for the next nearly 30 years. The Union County Rural Land Use Plan refines the 2050 plan by making recommendations for the rural part of Union County. For purposes of the Rural Land Use Plan study area, rural Union County is considered those areas in dark green in the [land use map](#) of the [Union County 2050 Comprehensive Plan](#), shown in Figure 1. For purposes of the plan, rural residential means development of no more than one home per acre, as well as agricultural uses. There are employment corridor and rural commercial node recommendations as well, but these areas are limited to specific parts of the rural area.

The 2050 planning process in 2019 through 2021 included a subcommittee specifically focused on agriculture. This committee supported many strategies for environmental and public safety initiatives but did not want to facilitate development by allowing additional clustering incentives for new developments or funding water and sewer expansions to support municipal planning efforts.

Agriculture is the dominant land use in the rural parts of Union County, and the following strategies are included in the 2050 Comprehensive Plan to support agriculture:

- Advocating for, or even financially supporting, expansion of high-speed internet into rural areas with high levels of agricultural activity
- Advocating for interstate status for US 74 and the Monroe Expressway to support agribusiness development
- Continuing the short line water extension program to take homes with unsafe well water off of wells
- Lowering density for major subdivisions in rural areas to preserve rural character

The Board of Commissioners authorized implementation committees to further research cluster standards and open space in rural areas. These committees met in 2021 and 2022 to make recommendations on how to balance accommodating residential development with minimizing impacts. The Board of Commissioners supported the recommendations of the open space committee, although they did not support many of the incentives for clustering development proposed by the cluster committee.

The overall vision for Union County from the 2050 process remains a guide to be referenced throughout implementation processes such as the Union County Rural Land Use Plan.

Rural Union County

Development Pressure

The rural area identified in the Union County 2050 plan represents approximately three quarters of all land in unincorporated Union County and more than half of all land in Union County. These areas are home to significant agricultural and environmental resources and have been facing continuing development pressures as development continues to expand outward from Charlotte and Mecklenburg County. The [map below](#) (Figure 2) shows recent, current, or proposed development in unincorporated Union County as of June 2025. The residential developments, shown in yellow, represent developments of eight or more lots.

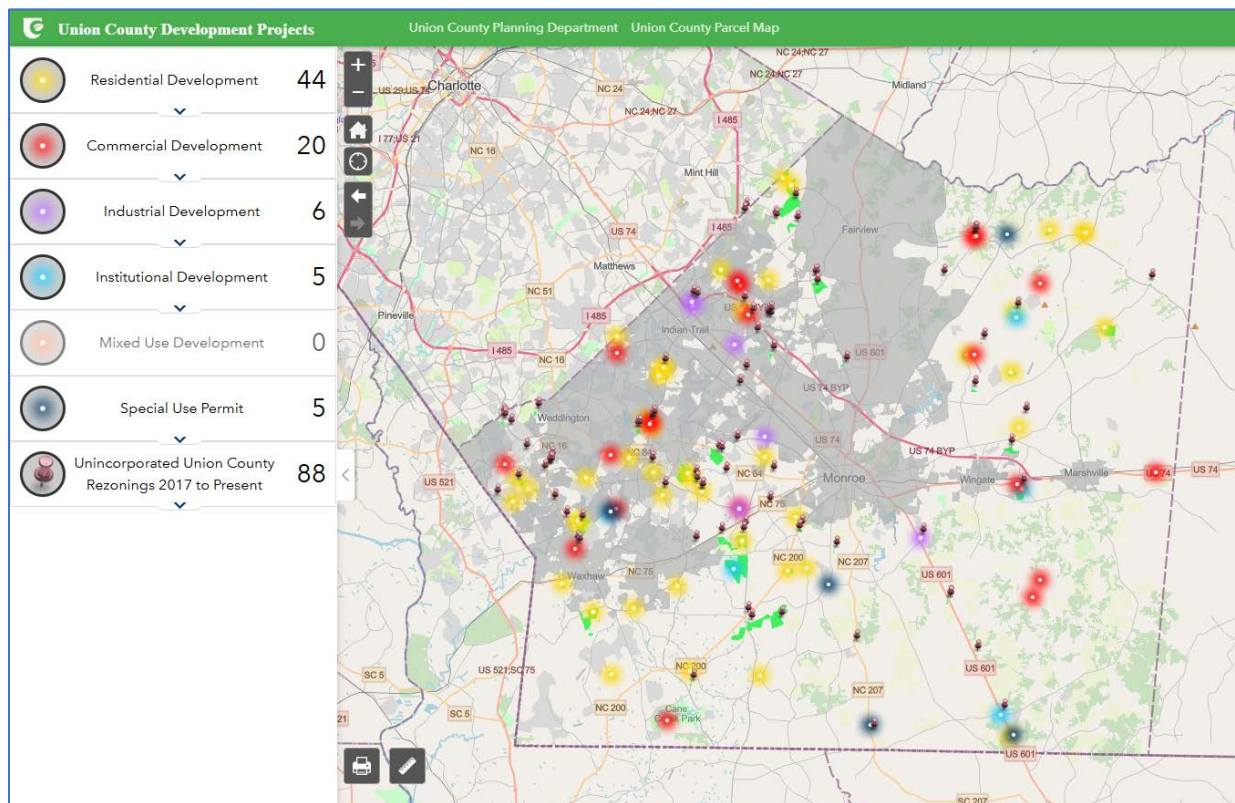


FIGURE 2

Minor residential developments, involving subdivisions of fewer than eight lots, are common in the rural parts of Union County. The [dashboard below](#) (Figure 3) shows minor subdivisions since 2020 in the rural parts of Union County, excluding Monroe, Sandy Ridge and Vance townships. Approximately 1,000 residential lots were created over this time. The rural parts of Union County are projected to add approximately

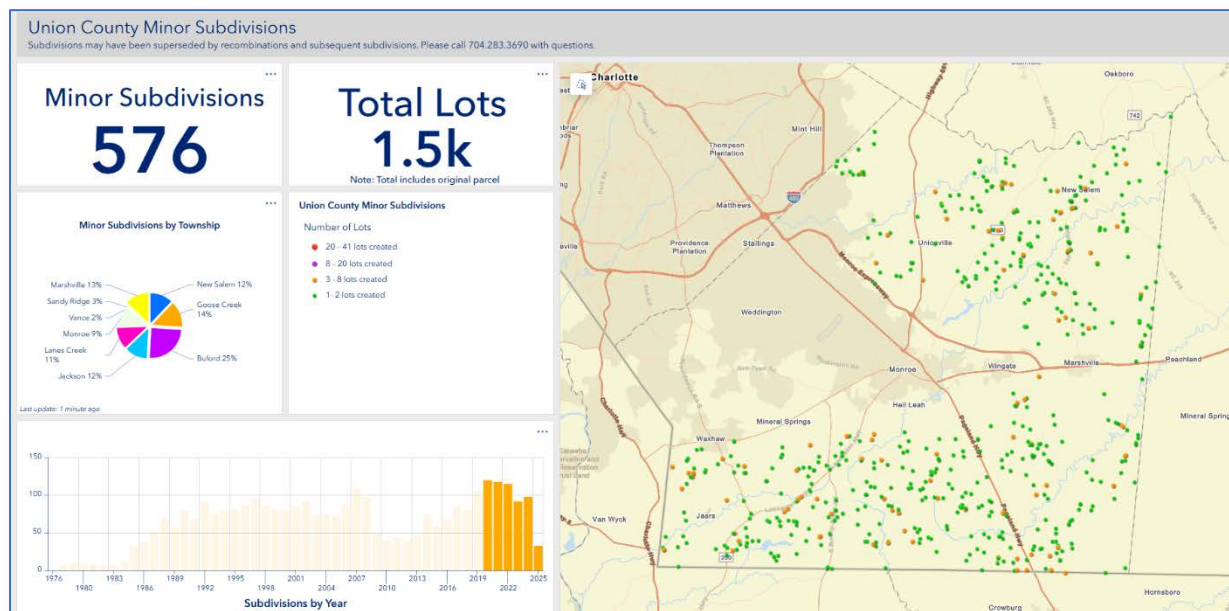


FIGURE 3

6,500 dwelling units between 2023 and 2055, or approximately 200 per year. At approximately three people per household this means an additional 20,000 residents over this timeframe. The major and minor subdivision totals since 2020 are consistent with this trend. Over the same period only approximately 1,200 jobs are projected to be added in the rural parts of Union County, further adding to Union County's imbalanced tax base.



FIGURE 4

While Union County residents and community leaders are strong supporters of property rights, there is a growing recognition that continued development and transition of agricultural and undisturbed lands impacts agricultural and environmental systems.

Agriculture



FIGURE 5

Union County is one of North Carolina's most important agricultural centers, which includes forestry activities. Despite being home to nearly a quarter-million people, Union County is still the third-most agriculturally productive county in the state, with a half-billion dollars in annual sales (Source: Monroe – Union County Economic Development).

Approximately half of all land (over 186,000 acres) in Union County was used for agricultural activities in 2017.

This is down seven percent in just five years. Despite this loss of land, Union

County ranks fourth in North Carolina for value of agricultural products sold. This productivity ranges from crop production (#1 in both soybeans and wheat) to cattle (#10) and poultry (#1 in egg layers, #2 in broilers, and #4 in turkeys). In addition to growing and raising crops and livestock, Union County is home to several animal processing plants, grain silos, and related industries.



FIGURE 6

The [2022 North Carolina Census of Agriculture](#) determined Union County has nearly 190,000 acres of farmland and loses approximately 3,000 acres of farmland per year. The County also ranks 13th highest nationally for open space loss according to a [2022 study by the American Farmland Trust](#). In response to these reports, the Union County Board of Commissioners approved an agricultural easement program in 2024, funded with the tax revenues from properties coming out of the agricultural tax program. [Union County's Land Preservation and](#)

[Easement Program](#) helps protect working farms and rural landscapes for future generations. As the County continues to grow, this program ensures Union County can balance development with conservation by keeping agricultural land in agricultural use.

A conservation easement is a voluntary legal agreement between a landowner and Union County Soil and Water Conservation District. It permanently limits certain uses

of the land to protect its conservation value, while allowing the landowner to continue owning, using and even selling the land. These easements are tailored to each property and designed to preserve its agricultural, natural or scenic qualities.

Easements are recorded with the property deed and remain in place if the land is sold or inherited. Union County staff monitor each easement to ensure compliance and continued protection from residential development.

Field Research

Union County partnered with Catawba Lands Conservancy (CLC) and the North Carolina Wildlife Resources Commission (NCWRC) to develop objective assessments of resources and priority areas to conserve to protect the county's rural nature and environment. Specifically, CLC and NCWRC identified rural areas important for sustaining the county's agricultural economy and natural resources (Figure 7) and advised Union County on open space preservation strategies.

Catawba Lands Conservancy (CLC)

Catawba Lands Conservancy protects land in Union County through conservation easements or ownership. CLC considers projects that provide quality habitat for wildlife, protect our region's water quality, support the local farming heritage, and provide outdoor recreational opportunities. Specifically, CLC prioritizes projects that expands protected parks and natural areas, supports habitat for rare and imperiled species, adequately protect lands around streams and wetlands, protects family farms and farmland with prime soils, or supports expansion of the Carolina Thread Trail network.

Union County partnered with Catawba Lands Conservancy (CLC) to identify important areas to conserve to protect the county's rural nature. Specifically, CLC identified rural areas important for sustaining the county's agricultural economy and natural resources (Figure 7). To identify the key areas for conservation, CLC evaluated five conditions for agricultural lands and eight conditions for natural resources, described further below. In CLC's analysis they evaluated 640 square miles of land across Union County which includes 395 square miles of rural lands. Within the rural areas there are thousands of acres of quality farmland and important natural resources, but the analysis focused on those that need protection now to protect the region's rural character. Further detail is provided below.

Methodology: Utilizing a Geographic Information System (GIS), the rural areas of Union County were broken into a grid of 30x30 meter cells. Within each cell a score is assigned for each variable and then totaled for the conservation score. The higher a score, the more important the cell is to protect the natural rural character for the county. Scores for Priority Natural Areas were out of 100. These areas are shown on Figure 7 on the next page and highlight the areas south of Waxhaw and Mineral Springs as priority areas from an environmental and agricultural basis. This analysis covers all of Union County and could be used by municipalities looking to protect environmental and agricultural

resources in their jurisdictions.

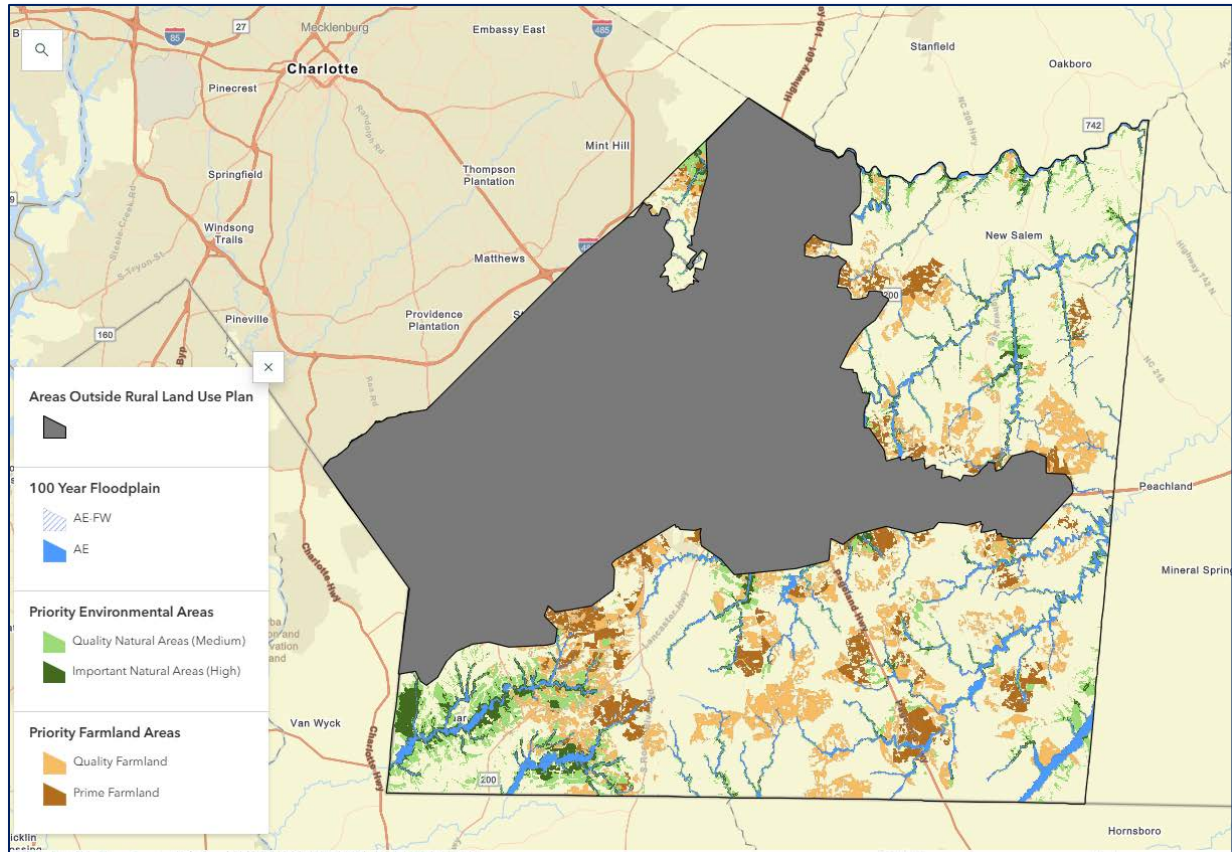


FIGURE 7

Natural Areas

The natural areas in Union County provide multiple benefits including aesthetics, protecting water quality, mitigating floods, filtering air, and providing habitat for plants and animals. The conservation plan identifies concentrated areas at threat of development that provide multiple benefits for the county's natural resources. To identify these areas, the CLC evaluated eight metrics which are described below (Table 1).

Close to Other Protected Lands: Adding additional conserved land to existing parks and natural areas helps to enhance the protection of those existing areas.

Additionally, growing existing parks and natural areas protects the aesthetics over a larger area.

Large Intact Forests: Larger natural areas provide greater benefits for wildlife and the public. Larger natural areas provide more room for wildlife to move, feed, and nest. Some priority conservation species require larger habitats for foraging, sheltering, finding mates, and smaller-scale migration, especially for young adult and fledgling animals finding new territories. Larger natural areas also help wildlife survive through major catastrophic events, such as floods, fires, and storms since larger natural areas provide greater refuge and areas with quality food.

Significant Natural Areas: Significant Natural Areas are identified by the North Carolina Natural Heritage Program as containing a concentration of high-quality habitat and rare or imperiled species. This designation does not provide any legal protection but does highlight land that is critical to protecting our state's biodiversity and natural areas. Natural Heritage Natural Areas (NHNAs) within the study area are listed in Table 2. The NC Wildlife Resources Commission recommends that development be avoided on and around NHNAs. In cases where development is proposed on or near an NHNA, cluster subdivisions may be an option to buffer these natural areas as open space set-asides.

Natural Resources Score Matrix	
Close to Other Protected Lands	20%
Large Intact Forests	20%
Significant Natural Areas	13%
Unique Natural Areas	10%
Interior Forests	10%
Steep Slopes over Streams	10%
500-Year Floodplain	10%
Rare or Imperiled Species	7%

TABLE 1: THE WEIGHT EACH METRIC PROVIDED OR THE NATURAL RESOURCES SCORE

Natural Area	Biodiversity Significance
Waxhaw Creek Aquatic Habitat	Exceptional
Richardson Creek Ledges	Exceptional
Goose Creek Aquatic Habitat	Exceptional
Polk Mountain	Very High
Jackson Blackjacks	Very High
Andrew Jackson Ridges	Very High

Crooked Creek Aquatic Habitat	Very High
Crooked Creek Ledges	Very High
Waxhaw Creek Floodplain	High
Jackson Sunflower Site	High
North Fork Crooked Creek Rare Plant Site	High
Fish Road Basic Forest	High
Lanes Creek Aquatic Habitat	Moderate
New Salem Branch	General
Lanes Creek Floodplain	General
Cane Creek Park	General

TABLE 2: LIST OF SIGNIFICANT NATURAL AREAS IDENTIFIED BY THE NORTH CAROLINA NATURAL HERITAGE PROGRAM.

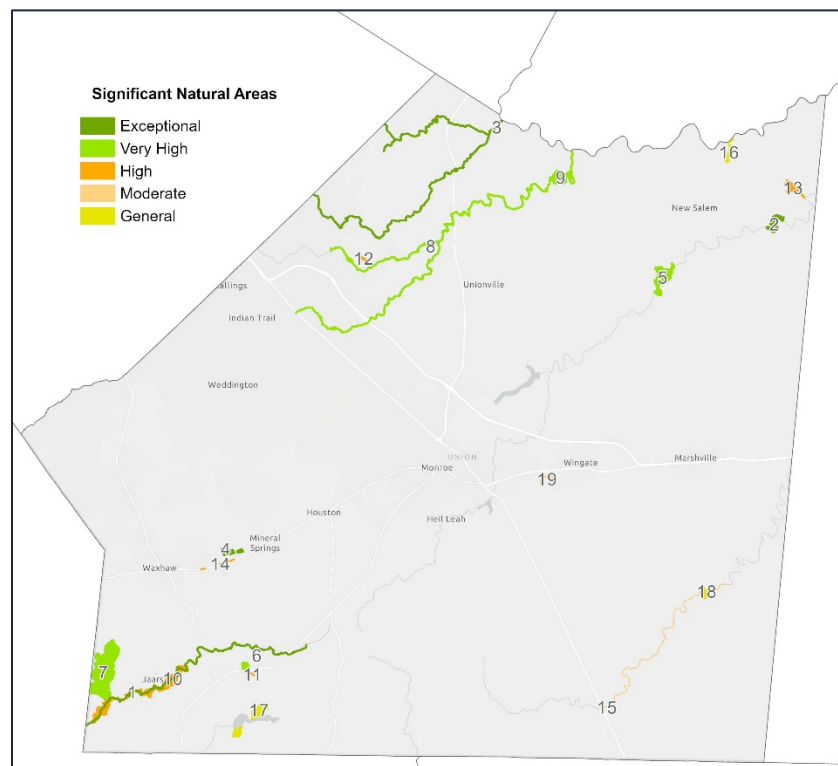


FIGURE 8

Unique Natural Areas: Within the broad categories of pasture, grasslands, hardwood forests, and floodplains are unique habitat types. Some are rare and unique to the piedmont of North Carolina and to Union County. For example, xeric hardpan forests are only found in North and South Carolina in the Charlotte area. They result from a special soil type that is very tight, leading to very dry conditions and a grassy forest floor with stunted trees.

Interior Forests: Some animal species are more sensitive to human disturbances than others. Additionally, they prefer the cover a forest canopy provides from predators.

Therefore, they are often found deeper in woods, away from forested edges. Protecting forests more than 300-feet from a forest edge provides the appropriate habitat for interior forest species.

Steep Slopes over Streams: Riparian areas along our rivers, creeks, and streams help to filter out pollutants and sediment, and keep water cool. However, as steepness increases the velocity of stormwater flowing into our water also increases. Protecting steep sloped areas along water bodies is important to limiting sedimentation. Additionally, the cool and moist conditions created by this setup provide habitat for plant and animal species more often found in the mountains of the Carolinas. These areas are important for protecting the county's biodiversity.

500-Year Floodplain: Our region has seen increasingly larger storms with flooding at or exceeding the 100-year floodplain. Protecting areas outside of the 100-year floodplain promotes flood resiliency in the future.

Rare and Imperiled Species: This includes species listed by the Endangered Species Act as Threatened or Endangered and species listed by the NC Wildlife Resources Commission and the NC Plant Conservation Program as Threatened, Endangered, Species of Concern, or Significantly Rare. These are only known locations where these species are currently found. This does not include species identified by the NC State Wildlife Action Plan as Species of Greatest Conservation Need.

Farming Community and Economy

Farmland in Union County supports the local economy and provides food for our region. The CLC's land analysis identifies clusters of farmland located on Prime or Statewide Importance land that can support the local farming community. To identify these areas, CLC evaluated five metrics which are described below (Table 3).

Contiguous Areas of Farmland: Protecting larger areas of farmland supports more viable and resilient agricultural operations, strengthens local food systems, and creates greater economic benefits. This also reduces potential interactions with residential development and farming operations.

Prime or Statewide Important Farmland Soils: These are soils that the Natural Resources Conservation Service identified as particularly productive because they can produce higher yields with minimal inputs or modifications. Statewide important soils are found by the NC Department of Agriculture and Consumer Services to produce higher yields with property soil management.

Farmland Score Matrix	
Contiguous Acres of Farmland	30%
Prime or Statewide Important Farmland Soils	30%
Close to Other Protected Lands	15%
Close to Markets (Urban Areas)	10%
Density of Farm Related Businesses	15%

TABLE 3: WEIGHT EACH METRIC PROVIDED FOR THE FARMLAND SCORE



Close to Other Protected Lands: Proximity to parks and other natural lands provide a buffer for farms to reduce interactions with development.

Close to Markets: Reducing the distance between farms and markets helps to improve the profitability of local farms by reducing transportation costs. Additionally, it improves the likelihood of supporting farm-to-table partnerships and Community-Supported Agriculture systems.

Density of Farm Related Businesses: Farms require specialized services and stores to continue operations such as large equipment repair shops, large animal veterinarians, grain and animal processing facilities, and farm supplies. These businesses require a certain mass of farms to remain profitable and in business. Protecting farmland around these businesses ensures the resiliency of the local farming economy.

North Carolina Wildlife Resources Commission

The NC Wildlife Resources Commission (NCWRC) developed the Green Growth Toolbox program to provide conservation guidance for local government planning projects that consider wildlife and natural resource conservation in land use and development planning, incentives and ordinances. The Green Growth Toolbox is designed to help communities conserve high quality habitats as communities and developers build new homes, workplaces, and shopping centers. The toolbox helps communities plan for growth in a way that will conserve natural assets such as fish, wildlife, plants, streams, forests, fields, and wetlands. Included in the guidance are recommended conservation data to identify conservation priorities, science-based conservation strategies to protect wildlife habitat and ecosystem services and planning best practices. The program also offers the Partners for Green Growth cost-share grant for local

governments to implement conservation in their planning activities and Union County was awarded funding in June 2024. As part of the Partners for Green Growth award, NCWRC staff assisted in identifying conservation priorities and associated planning strategies for Union County.



FIGURE 9, PHOTO CREDIT NCWRC



FIGURE 10, PHOTO CREDIT: USFWS

Open Space Prioritization

Open space site selection for natural landscapes should prioritize NC Natural Heritage Program Natural Areas, wide riparian buffers along rivers and streams, floodplains and wetlands, connected forests and grasslands, and buffers adjacent to properties

managing for agriculture and conservation. North Carolina Natural Heritage Program Natural Areas are areas of high special biodiversity significance identified by the NC Natural Heritage Program. These areas may not be protected but have rare species or significant high-quality natural communities. The NC Natural Heritage Program provides free mapping services that identify the locations of these natural areas. Property owners and engineers can access these GIS layers at <http://www.ncnhp.org> to identify any potential natural areas to prioritize in their open space set-asides. The NC Natural Heritage Program also provides a free managed land GIS layer that identifies properties managed for conservation. Open space can be prioritized to buffer these managed areas from development to allow for continued functional management of those protected lands.

The same buffers can be used for lands in current agricultural uses to ensure continued agricultural management. For most streams and rivers in Union County, the NC Wildlife Resources Commission recommends a minimum riparian buffer of 100 feet for perennial streams and 50 feet for intermittent streams. For streams in watersheds with federally-listed aquatic species, such as Waxhaw Creek and its tributaries, the NCWRC recommends a minimum riparian buffer of 200 feet for perennial streams and 100 feet for intermittent streams. Larger upland set-asides adjacent to riparian areas are recommended to be between 300-600 feet from the water's edges as they protect water quality, floodplain function and water storage capacity to reduce the impact of flooding, and protect wildlife habitat. Large tracts of native forests and grasslands not adjacent to riparian areas also provide water quality protection and facilitate water infiltration and groundwater recharge. Prioritize forest and grassland open space to be adjacent to other intact natural areas on adjacent properties and avoid fragmentation or the creation of natural habitat "islands" on properties.

Open Space Uses

For the purposes of conserving natural and working lands in the rural areas of Union County, open space set-asides should primarily be utilized and managed for low impact uses or agriculture. Working lands can be leased to local farmers for agricultural uses, and forests can be managed for timber production. There are several options for the use and management of open spaces for natural resource uses. The North Carolina Wildlife Resources Commission recommends management of the open space for the health of the landscape. If not being managed for agricultural purposes, there are several options for the management and development of open space if not entering into an easement or other program. These can include planning and managing for outdoor recreation opportunities like nature trails for local residents or managing for pollinator habitat. These management strategies are generally maintained through a Homeowners Association (HOA) or deed restrictions. A final method of management would be to not manage the open space for any specific use.



Visioning Process

The Steering Committee's first task in November 2024 was to develop a vision statement for the rural parts of Union County. A vision statement is a written document that describes Union County's long-term goals and aspirations for the future. It serves as a roadmap for the County and inspires the community. Specifically, a vision statement:

- Communicates value: A vision statement communicates the organization's value and commitment to achieving its goals.
- Guides direction: A vision statement directly motivates the organization's direction and purpose.
- Inspires growth: A vision statement inspires the organization's growth.
- Uses abstract language: Vision statements often use abstract language instead of vivid imagery.
- Can be daring: A vision statement can be daring, distinct, or even disagreeable.

The committee developed a draft vision statement in December 2024 that was released to the public for a comment period of January 1-31, 2025. The draft vision statement distributed for public feedback is below.

In the rural areas of Union County, we cherish a way of life where farms and protected open spaces define our community. As stewards of the land, we treasure the balance between living close to nature and preserving our agricultural heritage. Expanses of productive farmland remind us daily of where our food comes from, and by supporting flexible and managed land uses, we protect our environment and encourage public appreciation while ensuring agriculture thrives. This approach will sustain our rural character and provide a vibrant future for generations to come.

The County and committee members distributed informational handouts to local businesses, community contacts, and at County facilities, such as Cane Creek Park. In addition, Union County posted the survey link through the weekly County newsletter, plan web page, and social media. [A total of 210 residents provided comments on the vision statement.](#) Respondents overwhelmingly supported the draft vision statement, but did have concern about overly vague statements and flexible land uses.

In response to this public feedback, the steering committee revised the vision statement to clarify uses and protections for the environment. The vision statement on the



FIGURE 11

following page was approved by the steering committee at its February 25, 2025, meeting.

In the rural areas of Union County, we cherish a way of life where farms and protected open spaces define our community. As stewards of the land, we treasure the balance between living close to nature and preserving our agricultural heritage. Expanses of productive farmland remind us daily of where our food comes from, and by adding options for property owners, lowering density, and enhancing environmental protection requirements we preserve our natural resources and encourage public appreciation while ensuring agriculture thrives. This approach will sustain our rural character and provide a vibrant future for generations to come.

Strategy Development

The steering committee and staff took four months to review potential strategies to implement the approved vision for rural Union County. The committee operated under the following understandings of effective strategies:

- Are a policy or action designed to achieve a goal.
- Are the teeth of the plan.
- Need to be thought through to avoid unintended consequences.
- Ideally are effective on their own and not require other strategies to achieve effects.

The committee members discussed existing issues in the rural parts of Union County, and reviewed revisions to development standards, new or expanded programs, and changes to existing plans in order to implement the vision.

The committee reviewed the following issues but decided to not present to the public for feedback or recommend to the Board of Commissioners:

- Privately permitted septic systems
- Recommendations for modifying minimum lot sizes

The committee did not recommend taking these strategies to the public because the privately permitted system option is legal to use in North Carolina, so they did not feel Union County would have the ability to influence this status. The committee was split on the benefits of requiring larger lot sizes as well as allowing smaller lot sizes as ways of protecting open space.



FIGURE 12

The committee took the following strategies to the public for feedback, which was held from June 20 through July 20, 2025.

- Expansion of areas considered rural - The area immediately west of Monroe, totaling approximately six square miles is outside Union County's established sewer service basin, so higher

density development recommendations could be replaced with a rural residential designation. This would impact open space requirements and rezoning recommendations.

- Increasing/reducing the number of commercial nodes - Rural Centers function as small scale civic and commercial centers for rural areas of the County.

These Centers are clusters of low-density, non-residential uses located at a crossroads of two or more major or minor thoroughfares. Appropriate uses include convenience stores, civic buildings, gas stations and others. Rural Centers provide limited commercial and community services while still maintaining the rural nature of the community.

- Enhanced buffering along streams and water bodies – Local governments are prohibited by state law from enacting buffers beyond those established by the state, but could prioritize stream buffering in 30% open space requirements or as part of rezonings.
- Prioritization of land set aside in major subdivisions - This requirement applies to major subdivisions, which typically are eight or more lots or involve installing infrastructure such as roads or utilities. Union County does not currently specify which land to set aside in major subdivisions.
- Conditions for allowing commercial uses on residential land without rezoning - Commercial or industrial uses such as landscaping, plumbing, and storage facilities would be allowed on parcels of at least five acres without rezoning in exchange for four acres of protected open space for every one acre of development.
- Expanding conservation efforts to purchase easements - Union County has recently implemented an agricultural easement program with an allocation of approximately \$1 million per year from the General Fund. This strategy would recommend increasing the funding per year.
- Remove bypasses from [transportation plan](#) - There are four proposed bypasses south of Waxhaw, Monroe, and Marshville that impact the rural part of the County. These bypasses will likely increase development potential for new areas, like what was experienced with the Monroe Expressway. The removal process would involve the municipalities and NCDOT but would start with a Union County

position.

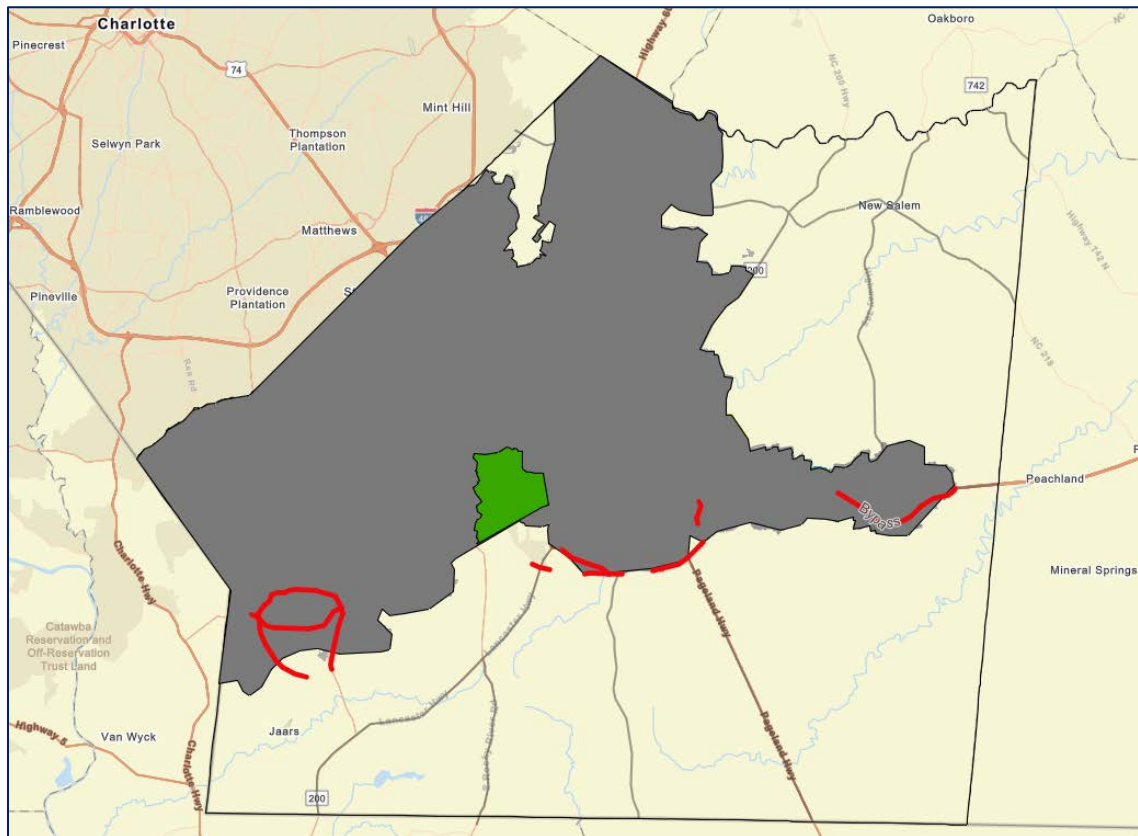


FIGURE 13

- Limit subdivisions in certain zoning districts - The Unified Development Ordinance includes a table with a list of uses allowed in each zoning district. Subdivision of land would be removed as an allowed by right use in certain zoning districts, requiring additional conditions or approvals to allow additional residential development in identified areas.
- Allowing property owners to pay into an open space fund in lieu of setting aside 30 percent open space within their development when no priority agricultural or environmental features are on their property.

The comment period was conducted through an [online StoryMap](#) and [embedded survey](#). The story map included maps such as the one above, which depicts the proposed addition to the rural area (shown in green) and the proposed bypasses near Waxhaw, Monroe, and Marshville.

Union County shared this information with the public through social media posts, announcements in the weekly Union County Horizons newsletter, email to the more than 500 people who have provided their email address to be kept apprised of the plan process, post cards distributed to businesses in the rural parts of Union County, and an interview on the local WIXE radio station. A total of 166 people submitted [feedback and comments](#) on the strategies. The demographics of the respondents



did skew older and more established than the County as a whole, with nearly 2/3 of respondents having lived in the county more than 20 years, and over 40 percent 60 years or older. Only five respondents were under 30, for example. Nearly all respondents (88 percent) lived and/or worked in the rural parts of Union County.

The public generally supported more restrictions on development and strongly supported protection of the environment and agricultural lands. They were somewhat supportive of adding additional rural centers and expanding the rural area to areas immediately west of Monroe. They opposed flexibility for developers to be able to “buy back” land otherwise required to be set aside as open space if no priority agricultural or environmental features were found on site, and expressed skepticism over the opportunity for owners of large lots (five acres or more) to be able to establish low-impact businesses on their property in exchange for significant open space requirements.

The chairman of the steering committee, Allan Baucom, presented the proposed strategies and public feedback to the Land Use Board and Board of Commissioners for their awareness and feedback as well. The [Land Use Board received this information at](#)

[its July 15, 2025, meeting](#). The Board was generally supportive of the strategies but did express concerns over how to pay for the proposed agricultural easement program expansion.

The Board of Commissioners received a similar update at its [August 11, 2025, meeting](#).



FIGURE 14

Strategy Recommendations

The committee then evaluated the strategies at its August and September meetings, where they voted to recommend the following strategies as part of the plan.

Expand agricultural easement purchase program: The committee voted to recommend expanding the existing program, with a goal of protecting 10% of the agricultural land in Union County by 2050. This is estimated to cost \$3-5 million per year in additional funds to protect 10% of the approximately 190,000 acres used by agriculture in Union County. The soil and water conservation district property tax referendum strategy is recommended as the preferred funding source, which would cost ½ cent to one cent per \$100 in value in property taxes per year to fund and would raise \$3 to \$6 million per year. A general increase to the property tax, as well as a ¼ cent sales tax allowed in North Carolina under Article 46 Optional Quarter Cent Sales Tax, could also be considered to fund the program.

Require contiguous areas for open space in major subdivisions: Union County currently requires 30% open space in major subdivisions, excluding floodplains, stream buffers, or road right of way. The open space currently can be scattered throughout the neighborhood, which may not help protecting environmental features. The committee discussed options from 50 to 80% required contiguous areas before recommending 60% as a minimum. This open space requirement would first be applied to intact forests, which were the first priority of the committee and public. The committee considered rare and protected species, wetlands, or stream buffers as the second priority. Stream buffering was ultimately recommended as the second priority. These priorities would be implemented through amendments to the Unified Development Ordinance (UDO).

Purchase priority land with fee in lieu for open space requirements: The committee recognizes the burden of a small development maintaining a parcel of open space, so it recommends allowing the developer to pay into the County's Land Preservation and Easement Program based on the value of land that is no longer required to be kept in open space in the proposed development. Eligibility would be limited to smaller developments, such as ones that do not require new roads.

Add flexibility for commercial uses in rural areas: Small business owners looking to start or expand low traffic commercial or industrial businesses such as landscaping, plumbing, and similar trade-type uses would be allowed on parcels of at least five acres without rezoning in exchange for four acres of protected open space for every one acre of developed area. These new options for property owners would be implemented through amendments to the Unified Development Ordinance (UDO).

Express concern over impacts from bypasses: Union County has experienced significant development pressures along the Monroe Expressway in recent years. There are several proposed bypasses that extend into the rural parts of Union County and the committee felt these bypasses could have similar impacts on development patterns. The committee has concerns about ease of development in rural areas if the southern Waxhaw and Monroe bypasses are built. The committee supports the Marshville



Bypass, noting the long-range plan for upgrading US 74 to interstate standards and the potential of building it using toll revenues. The committee acknowledges that the County does not have the authority to unilaterally remove any of the bypasses from the CTP. This position would allow the Board of Commissioners to engage with the NCDOT, Charlotte Regional Transportation Planning Organization (CRTPO) and affected municipalities on concerns raised through this plan.

Limit major subdivisions in certain zoning districts: The committee has concerns over large subdivisions being allowed anywhere in the rural parts of Union County. Current North Carolina general statutes limit County authority to downzone or otherwise reduce uses allowed on a property. The subdivision of land is not a use, so the committee recommended limiting major subdivisions (those that create eight or more lots) to where water and/or sewer can be provided by a central service provider. A central service provider is defined as any sewage treatment facility owned and operated by a sanitary district, a metropolitan sewage district, a water and sewer authority, a county or municipality or other public utility, or a private utility. This strategy would be implemented through amendments to the UDO.

Expand rural area in the Land Use Map: The committee supports expanding the rural area by approximately six square miles west of Monroe, shown in Figure 12. This designation would reduce development impacts for new subdivisions in this area and instead incentivize such development to request annexation into an adjacent municipality. This strategy would be implemented through amendments to the Land Use Map.

Add six rural centers to the Land Use Map: Rural Centers function as small scale civic and commercial centers for rural areas of the County. These Centers are clusters of low-density, non-residential uses located at a crossroads of two or more major or minor thoroughfares. Appropriate uses include convenience stores, civic buildings, gas stations and others. Rural Centers provide limited commercial and community services while still maintaining the rural nature of the community. The committee acknowledged the flexibility from having additional small-scale commercial nodes in the rural areas, particularly where existing commercial operations already occurred and therefore recommend nodes at the following intersections be added as amendments to the Land Use Map.

- South Providence Road and NC 200
- South Rocky River Road, Parkwood School Road, and NC 200
- Plyler Mill and Griffith Roads
- New Salem Road, Carl Polk Road, and Sugar and Wine Road
- Love Mill Road and NC 218
- Lawyers Road and Mill Grove Road

Create a Conservation Development Brochure: Part of the scope for this overall plan development involved creating a development brochure to assist property owners and developers understand how to apply open space requirements in new major subdivisions. This brochure will be created as part of the implementation of this



plan, along with amendments to the UDO and funding commitments by the Board of Commissioners.

Conservation Strategies and Funding Sources

There are many private, public, and non-profit organizations and programs that can help with open space preservation. There are also different ways of protecting land. The traditional way is to purchase land for permanent protection. This method is more expensive and requires upkeep of the land by the owner. A conservation easement is a more common approach and is an agreement between a property owner and a conservation non-profit or government agency that allows landowners to retain ownership and use of their property but restricts development on the property. Each conservation easement is different because they are negotiated by the landowner and the conservation entity. Depending on the terms, a conservation easement will allow for farming, timber management, agrotourism, and wildlife management activities. The restrictions are permanent and apply to future landowners. Landowners can realize certain property and income tax benefits from these agreements.

The CLC prefers projects that provide enhanced protection beyond regulatory or zoning requirements such as FEMA floodplains, tree saves or required open space. However, in special circumstances, CLC will consider projects in FEMA floodplains, tree saves or required open space that have significant conservation values such as state recognized significant natural areas or rare species that require specialized management. In these situations, CLC would need adequate funding for long-term management. Additionally, CLC will consider projects along adopted Carolina Thread Trail corridors to advance trail development.

The list of resources listed below is not exhaustive but provides options in North Carolina.

NC Resilience Exchange (<https://www.resilienceexchange.nc.gov>): A central resource to identify funding for conservation activities that improve community resiliency including land conservation, land stewardship, and utility improvements.

State Programs

NC Land and Water Fund: An annual fund that provides grants for land conservation, stream restoration, and conservation planning. The program focuses on conservation projects that support water quality, protection of impaired species and natural areas, and historical sites. Funds can be used to purchase conservation easements or full ownership. A match is not required but suggested to be competitive.

North Carolina Parks and Recreation Trust Fund: PARTF provides dollar-for-dollar matching grants to local governments for the acquisition and/or development of park and recreational projects to serve the general public. A local government can request a maximum of \$500,000 with each application. Local governments can apply to acquire land for parks and build recreational facilities for use by the public. A PARTF grant can also be used to protect the natural and scenic resources or renovate older park facilities.



NC Agricultural Development and Farmland Preservation Trust Fund: Annual fund that provides grants to support local farming economies, conservation of farmland, and planning for farmland conservation. Projects in Union County require a 30% match which can be cash, in-kind, or donated property value. These funds can be matched with the USDA's Agricultural Land Easement Program.

Federal Programs

USDA Agricultural Conservation Easement Program: The Agricultural Conservation Easement Program (ACEP) helps landowners, land trusts, and other entities protect, restore, and enhance wetlands or protect working farms and ranches through conservation easements. Land eligible for agricultural easements includes private or Tribal land that is agricultural land, cropland, rangeland, grassland, pastureland and nonindustrial private forest land. Priority is given to farms that maximize protection of contiguous agricultural lands and have soils identified as Prime, Unique, or Other productive by the Natural Resources Conservation Service.

Land and Water Conservation Fund (LWCF): Provides funding through different programs to local governments. The Cooperative Endangered Species Conservation Fund provides grants to local governments through the state to protect and conserve Federally listed threatened and endangered species and the habitats on which these species depend. The National Park Service State and Local Assistance Programs provides 50/50 matching grants to local governments, through the states, for the acquisition and development of public outdoor recreation areas and facilities.

Regional Conservation Partnership Program: This program is a partner-driven approach to conservation that addresses identified resource needs on agricultural lands. Through this program, project partners support farmers, landowners, and the community by providing matching funds for conservation activities and purchasing conservation easements. Activities can include implementing best management practices, land restoration, purchasing conservation easements, and public work projects that address a natural resource need. Partners do need to identify a combination of 1-to-1 cash and in-kind match.

Local, Private, or Non-Profit Programs

Present Use Value (PUV) programs: PUVs provide property tax deferments for property owners that commit to utilizing their property for forestry, agriculture, or wildlife conservation purposes. The intention of any PUV program is to tax property for its current use, which is lower than the theoretical market value that is used to value property taxes. Properties enrolled in a PUV must follow each program's requirements. Any property that is disqualified due to falling out of compliance will be required to pay "roll back" taxes or the sum of the previous three years of unpaid deferred taxes plus interest and the current year's theoretical market value.

- o Forestry PUV: Properties managed and utilized as commercial forestland can qualify for North Carolina's forestry PUV program. Property owners can contact the [Union County NC Forest Service](#) office for more information.



- o Agriculture PUV: Properties actively engaged in agricultural or horticultural uses may qualify for the agriculture PUV program through the NC Department of Agriculture and Consumer Services. Qualifying properties must generate a minimum of \$1,000 gross per year in farm production. Contact the Union County NC Cooperative Extension office for more information.
- o Wildlife Conservation Land Program (WCLP): The Wildlife Conservation Land Program allows private landowners who manage their property for protected wildlife species, priority wildlife habitats or as Wildlife Reserve Land to apply for a property tax deferment. Visit <https://www.ncwildlife.gov/wclp> for more information and an outline of qualifying requirements.

Conservation Fund: [The Conservation Fund](#) is a non-profit founded on the idea that environmental protection and economic vitality are mutually reinforcing strategies that make our society stronger. They are twin pillars of a national strategy: economic growth without environmental protection is unsustainable, and environmental protection without economic growth is equally unsustainable. For more than 40 years, The Conservation Fund has been [buying at-risk land](#) with high conservation value to protect it from degradation, putting protections in place to ensure it is managed for environmental, economic, and human gain before finding long-term owners, ideally operations relatively new to farming. The Fund has a 10-year goal of protecting 5,000 acres of land over the next 10 years in the Charlotte region.



Adoption

The Rural Land Use Plan Steering Committee was tasked with developing a plan, but the Land Use Board likewise plays a role in making recommendations on all planning initiatives and proposals. The Steering Committee recommended the plan to the Land Use Board at its October 7, 2025, meeting. Union County then emailed the more than 500 Union County residents who previously provided their email address and requested updates on the plan and its development.

The Land Use Board reviewed the plan at its October 21, 2025, meeting. A total of XX residents spoke at the meeting. After reviewing the plan, the Board recommended XXX. Add detail from their discussion.

The Board of Commissioners held a public hearing at its November 17, 2025, regular Board meeting. A total of XX residents spoke at the hearing. Add details of adoption process.

Conclusion

Union County currently is home to over 270,000 people and will continue to add thousands of additional residents each year for the foreseeable future. Remote work, desire for a quieter lifestyle, and lower land costs have increased development pressure in the rural parts of Union County. This development comes with impacts, both as a loss of agricultural land and as impacts to environmental features. This plan was initiated in 2024 to help develop strategies to protect environmental and agricultural resources, as well as provide options for small business owners and farmers who want to stay on their land.

The Union County Rural Land Use Plan was resident-led, starting with the advisory committee that guided the work, and ending with three rounds of public comment opportunities regarding the vision, the strategies, and the overall plan. Over 500 residents were kept apprised of progress, and over 300 provided their feedback on at least one phase of the plan development. **The plan was adopted by the Union County Board of Commissioners on November 17, 2025.**

If fully implemented, the Union County Rural Land Use Plan would permanently protect 30 square miles of working agricultural land, allow community-scale commercial development at identified intersections, allow small business owners to establish and expand their low-impact businesses in exchange for protected land, and better protect forests and streams as residential development occurs.

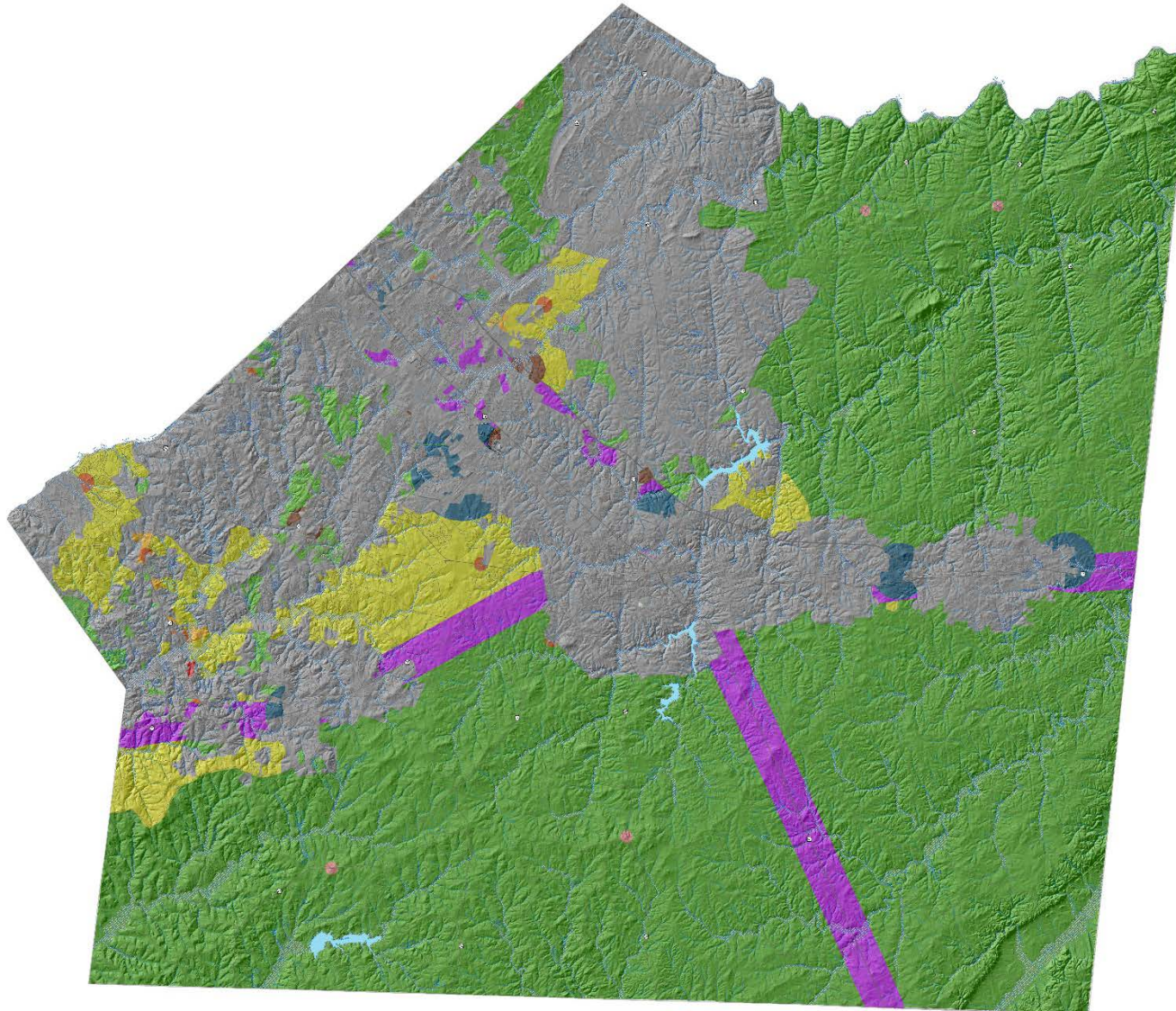
Union County would like to thank its steering committee, the Catawba Lands Conservancy, and the North Carolina Resources Commission for their time and support over this year-long process. Together they developed an effective, focused, and endorsed guide for protecting the rural parts of Union County for the next 25 years.



Rural Land Use Plan

Board of Commissioners
November 17, 2025

2050 LAND USE MAP



Land Use Plan Descriptions

- Transition Zone:** Upzonings would be denied by Union County and reference to adjacent municipality for annexation.
- Agricultural Area:** Farming, forestry and rural residential.
- Single Family Residential:** Detached single family (>2 unit/acre).
- Mixed Residential:** Mixed residential (detached single family, patio, and cottage homes, townhomes, and multi-family).
- Employment Corridor:** Logistics, industrial, and agri-business related uses.
- Employment Center:** Industrial and office uses.
- Community Center - Large:** Community-serving commercial centers with a larger footprint and service area.
- Community Center - Small:** Community-serving commercial uses (retail, restaurant and services) including opportunities for office, civic, institutional and mixed residential uses.
- Neighborhood Center:** Neighborhood-serving commercial uses (retail, restaurant and services) and mixed residential uses.
- Rural Center:** Small scale commercial and civic uses.
- Town Center:** Existing downtown or town center with a range of uses including commercial, office, civic, institutional and mixed residential uses.



• **ROLE OF STEERING COMMITTEE**

- Research options
- Solicit public feedback
- Make recommendations to LUB and BOCC

ROLE OF LAND USE BOARD

- Make recommendations to Board of Commissioners
- Participate in planning process as requested
- Provide feedback to the Steering Committee

ROLE OF BOARD OF COMMISSIONERS

- Provide feedback to the Steering Committee
- Approve plan
- Implement strategies

• **APPROVED VISION STATEMENT**

In the rural areas of Union County, we cherish a way of life where farms and protected open spaces define our community. As stewards of the land, we treasure the balance between living close to nature and preserving our agricultural heritage. Expanses of productive farmland remind us daily of where our food comes from, and by adding options for property owners, lowering density, and enhancing environmental protection requirements we preserve our natural resources and encourage public appreciation while ensuring agriculture thrives. This approach will sustain our rural character and provide a vibrant future for generations to come.

• OUTREACH

- Two rounds of public engagement (visioning and strategy development)
- Social media postings
- Weekly newsletter
- Email to 600+ interested residents and municipalities
- Updates on County web site
- Interview on WIXE
- Almost 400 responses from public
- Presentation to municipal planners
- Public steering committee meetings

• **WHAT ARE STRATEGIES?**

- A policy or action designed to achieve a goal
- They are the teeth of the plan
- Need to be thought through to avoid unintended consequences
- Ideally are effective on their own and not require other strategies to achieve effects

RECOMMENDED STRATEGIES

Name	Description	Implementation
Expand agricultural easement purchase program	Protect 10% of all agricultural land by 2050	Increase funding by \$3-5 million per year
Add flexibility for commercial uses in rural areas	Allow low impact commercial development without rezoning on five acre minimum lots and four acres of protected land per acre of development	Unified Development Ordinance amendment
Require contiguous areas for open space in major subdivisions	Require open space to be concentrated, with 60% contiguous, focused on forests and streams	Unified Development Ordinance amendment
Purchase priority land with fee in lieu for open space requirements	Allow smaller impacted subdivisions to avoid open space requirements by paying into agricultural easement program	Unified Development Ordinance amendment

RECOMMENDED STRATEGIES

Name	Description	Implementation
Express concern over impacts from bypasses	Express concern over development impacts from bypasses south of Waxhaw and Monroe	BOCC policy
Limit major subdivisions in certain zoning districts	Require major subdivisions to have access to water or sewer	Unified Development Ordinance amendment
Expand rural area in the Land Use Map	Add six square miles immediately west of Monroe to rural residential district	Land Use Map amendment
Add Six Rural Centers to Land Use Map	Add small commercial centers to six intersections in rural areas • NC 200 and South Providence • NC 200 and S. Rocky River • Griffith and Plyler Mill • New Salem and Sugar and Wine • NC 218 and Love Mill • Lawyers and Mill Grove	Land Use Map amendment

• NEXT STEPS

- October 21 – Endorsement by Soil and Water Conservation District Board
- October 21 – Land Use Board recommendation
- November 6 – Present to Agricultural Advisory Board
- November 17- BOCC consideration of plan
- November Steering Committee: Rural business uses, agricultural easement purchase program funding recommendations
- December Steering Committee: Fee in lieu of open space for smaller subdivisions, open space requirement language
- January Steering Committee: Major subdivision utility requirement language, expressing concern over impacts from bypasses, introduce development guide
- February Steering Committee: Finalize any remaining ordinance language, draft development guide
- March Steering Committee: Finalize development guide
- February/March Land Use Board: Review amendments
- March/April BOCC: Conduct public hearing and consider adopting amendments and other Committee recommendations

THANK YOU!



• **STRONGLY SUPPORTED STRATEGIES**

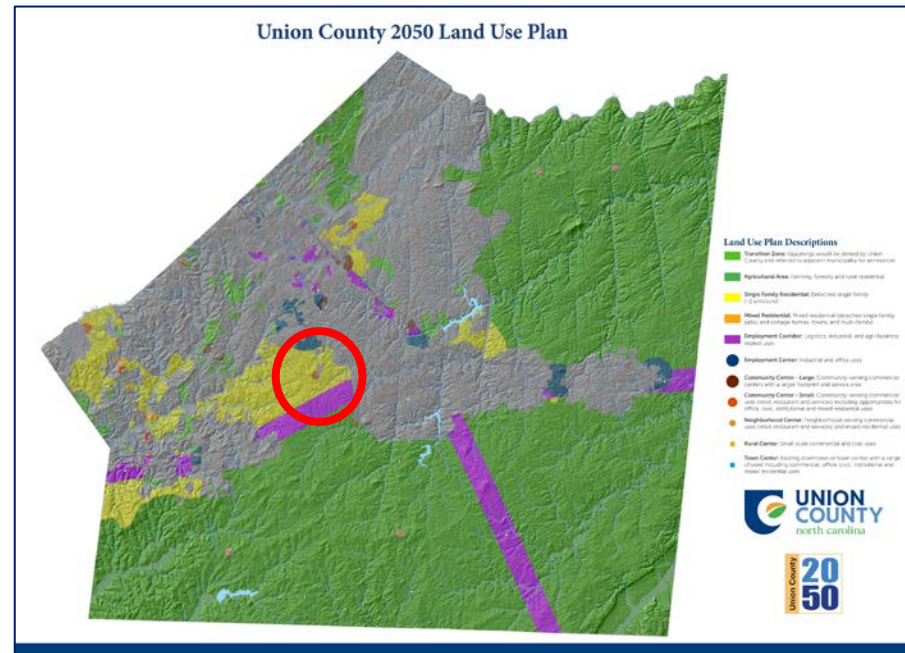
- Expand agricultural easement purchase program
- Require contiguous areas for open space in major subdivisions
- Proposing removal of one or more bypasses
- Limit subdivisions in certain zoning districts
- Protect intact forests in the 30% open space required area. Rare and protected species, wetlands, and streams are tied after forests

The steering committee and public levels of support are consistent for the above strategies.

Implementing these strategies would require a combination of Unified Development Ordinance (UDO) amendments, additional County funding, and coordination with municipalities and the NCDOT.

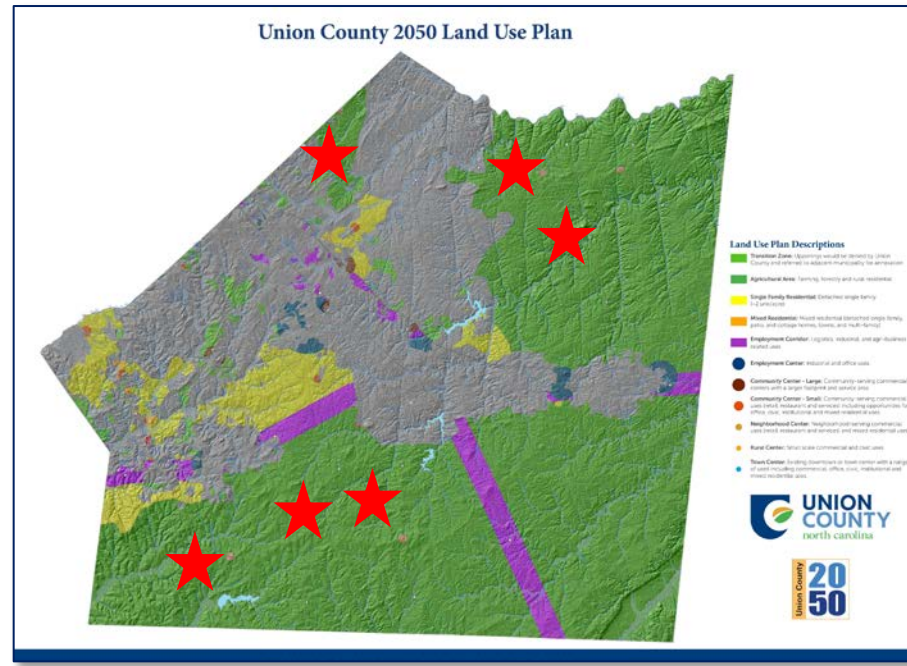
• SUPPORTED STRATEGY

- Expand rural area on land use map
- Implementing this strategies would occur through an amendment to the land use map for Union County
- Frequent comments:
 - “We have enough high density housing in Union County. We can’t get county water here in parts of Unionville.”
 - “Union County is already upside down on development with disproportionately more residential development happening.”
 - More rural is a better use of this beautiful county. We don’t want to be Mecklenburg. Let rural designations help keep the green space charm“
 - “I think rezoning this area back to rural is fantastic, our 2 lane roads are already over crowded with the housing developments already in Union County. I believe there is already too much high density development here and any areas that can be changed back to RA-40 is a step towards the right direction again.”



• SUPPORTED STRATEGY

- Add six rural centers to the land use map
- Frequent comments:
 - “We don’t mind driving to town”
 - “Commercial centers will turn into broader developments”
 - “I think this could be a good thing, but we can’t let this get out of hand”
 - “We have enough gas stations, grocery stores, and shopping centers. Open a park, or even better plant corn on the properties.”
 - “I appreciate and like this idea. It appears this is intended to "officially" document what has already occurred at the locations identified.”



• NOT SUPPORTED STRATEGIES

- Purchase parcels in priority areas in exchange for higher density in remaining areas
 - Concerns over implementation and lawsuits
 - Would require NCGA enabling legislation
- Allow low impact commercial and industrial uses on residentially-zoned land
 - 5-10 acres most common suggestion for minimum lot size
 - Need to determine ratio of developed to protected land, such as four acres protected for every acre developed
 - Implementing this strategies would require amending the UDO to add a new “rural business” use for RA-zoned land
- Frequent comments:
 - “This would not be enforced and there should be strictly following the land use zoning rules.”
 - “These seem like very low impact uses and would blend with the land and development.”
 - “It should be acre for acre. If you’re going to take 5 for use then you protect five acres. I believe that we are losing sight of rural living by adding more and more.”
 - “I think that if someone wants to start and run a business on their own land, they should be able to do so without jumping through hoops or being denied due to a lack of land.”
 - “Can we just not please. Why would a residential area that went in knowing around them was residential now want commercial vehicles and businesses in their neighborhoods.”
- Observation: Strategies that increase flexibility for property owners and developers not supported as much as strategies that limit development

• **HOW TO RESTRICT MAJOR SUBDIVISIONS AS A USE**

- Strictly speaking, subdivisions are not a land use
- Current NCGS limiting downzoning of property
- Eligible strategies:
 - Require Special Use Permit for major subdivisions
 - Add an additional requirement that a major subdivision in the rural area would require access to at least one public utility
- Ideal strategy – downzone all land in rural areas and process subdivisions as rezonings

UTILITY NETWORK MAP

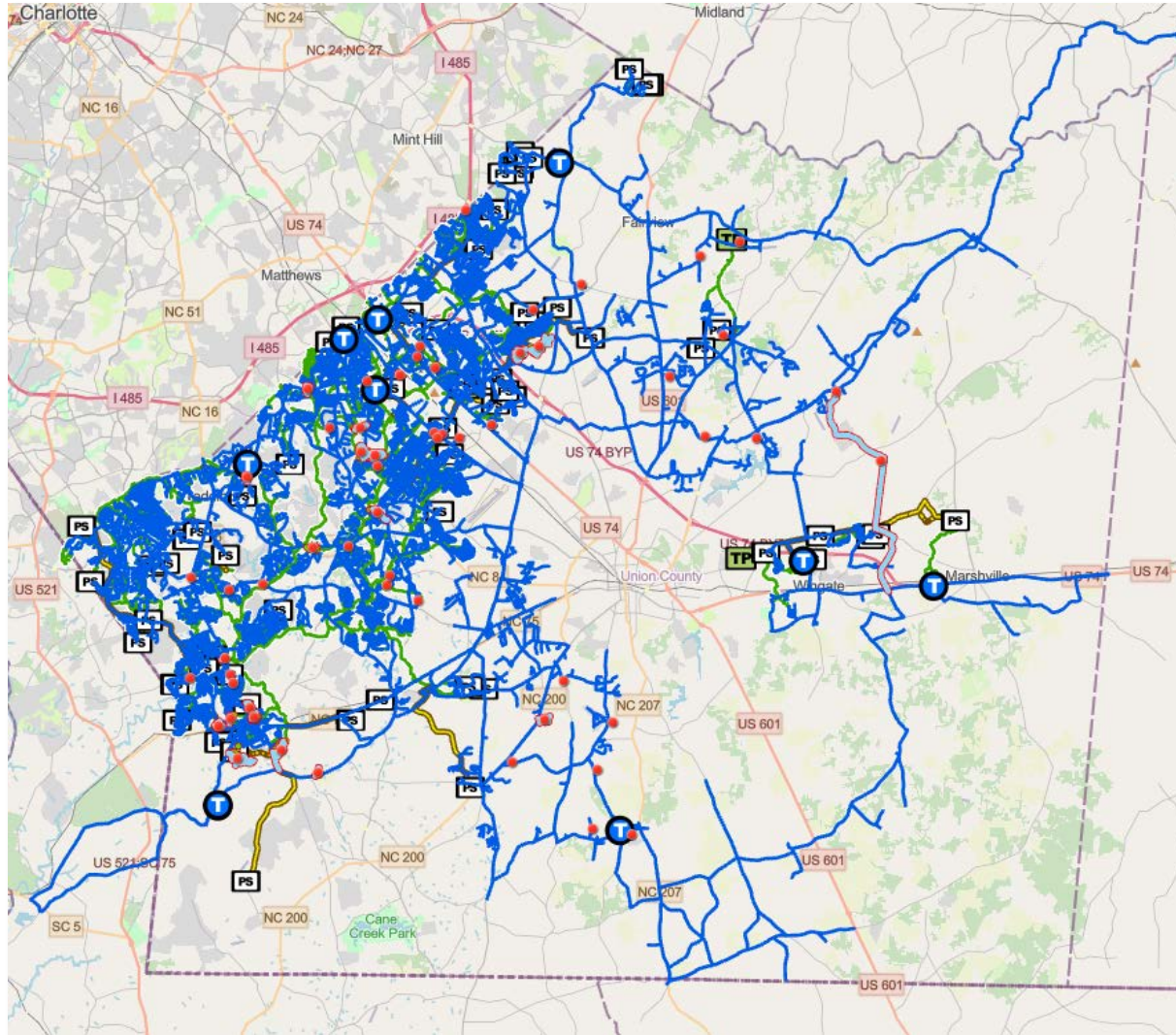
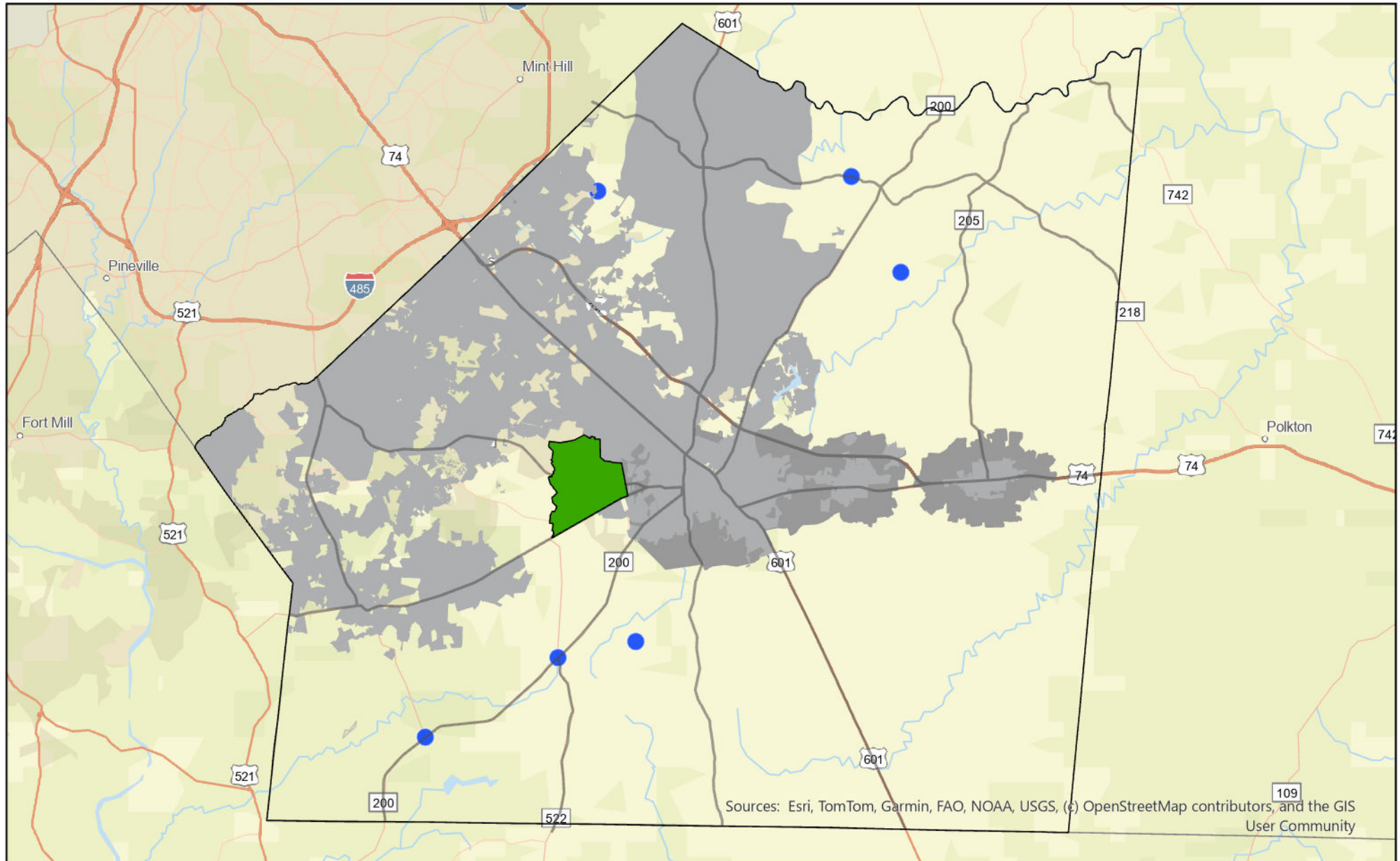


Exhibit A: Rural Land Use Map Amendments



0 2.75 5.5 11 Miles

Map made: October 27, 2025
by Bjorn Hansen, Senior Planner - Long Range Planning
bjorn.hansen@unioncountync.gov

Legend

- | | |
|------------------------------|----------------------------|
| Union County | Municipal Boundaries |
| Proposed Expanded Rural Area | ETJ |
| Highways | Proposed New Rural Centers |





Union County, NC

Staff Report

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

File #: 25-717

Agenda Date: 11/17/2025

TITLE:

Proclamation - Remembering Charles "Chic" Richardson

INFORMATION CONTACT:

Chair Melissa Merrell, Board of County Commissioners

ACTION REQUESTED:

Adopt proclamation remembering Charles "Chic" Richardson.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This Proclamation recognizes and honors Charles "Chic" J. Richardson for his dedication and service to his country. Mr. Richardson served in the United States Army Air Force during World War II as a B-17 bomber crewman. Mr. Richardson passed away on November 3, 2025, at the age of 102.

FINANCIAL IMPACT:

None.

PROCLAMATION BY THE UNION COUNTY BOARD OF COMMISSIONERS HONORING CHARLES “CHIC” J. RICHARDSON

WHEREAS, Charles “Chic” J. Richardson, born on June 7, 1923, answered the call of duty during one of the most pivotal conflicts in history, serving with distinction and courage in the United States Army Air Forces during World War II; and

WHEREAS, Mr. Richardson served in the European Theater of Operations as a radioman and gunner on a B-17G with the 8th Air Force, 390th Bomb Group (Heavy), 571st Squadron, stationed in Framlingham, England. He took part in numerous high-risk missions that played a crucial role in the Allied efforts to secure victory. Through his commitment and bravery, he contributed to the liberation of Europe and the eventual Allied victory; and

WHEREAS, Mr. Richardson’s outstanding military service was marked by acts of extraordinary valor. His awards and commendations, including the Distinguished Flying Cross, Air Medal with four Oak-Leaf Clusters, two Presidential Unit Citations, Russian Medal of Victory, French Jubilee of Liberty Medal, and the French Legion of Honor Medal, reflect his heroic efforts and commitment to duty. These accolades are not only symbols of his bravery but also of the profound respect and gratitude of the nations he helped to liberate; and

WHEREAS, among his many achievements, Mr. Richardson was awarded a Certificate in Recognition of his service and contributions to liberating France and for his participation in the Invasion of Normandy, signed by the French Secretary of Defense. These honors speak to his deep sacrifice and steadfastness, enduring experiences of terror and hardship that forever marked his life and that of those who served beside him; and

WHEREAS, Mr. Richardson’s journey in the military included returning to the locations he once served in Europe, witnessing the transformation of places he helped liberate over eighty years prior, reflecting the lasting impact of his sacrifices and the enduring bonds of peace fostered through his service; and

WHEREAS, following his military service, Mr. Richardson continued to honor his fellow service members and the memory of those who served by actively participating in the 390th Bomb Group Historical Society Chapter in Charlotte, North Carolina, where he shared his experiences with future generations, ensuring that the lessons of courage, sacrifice, and resilience are never to be forgotten; and

WHEREAS, Mr. Richardson’s life and service embodied the highest ideals of loyalty, courage, and patriotism, serving as an example of the dedication and strength of our nation’s servicemen and women. His story, his valor, and his lifelong commitment to preserving the legacy of his fellow veterans are a testament to the profound impact that one individual can have on history and on the lives of countless others.

NOW, THEREFORE, BE IT PROCLAIMED by the Union County Board of Commissioners here by proclaim heartfelt recognition and commendation for Charles “Chic” J. Richardson. His courage, heroism, and dedication to his country and comrades continue to inspire and remind us of all of the sacrifices made in defense of freedom. It is with great respect and admiration that we honor and recognize Mr. Richardson today as a true American hero.

Adopted the 17th day of November 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 #: 25-693

Agenda Date: 11/17/2025

TITLE:

Contract - Catawba River Water Treatment Plant Expansion - Preliminary Engineering Report

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Water Capital Improvement Program (CIP) includes an allocation for the design and construction of an expansion of the Catawba River Water Treatment Plant to 56 MGD with all costs being shared 50% each with Lancaster County Water and Sewer District. The preliminary engineering report (PER) will review the condition of the existing plant, evaluate alternatives for current and future facility expansion, develop and execute PFAS pilot testing for treatment options, and analyze algae treatment methods in the raw water reservoir to continue to manage water quality related to taste and odor.

Weston & Sampson Engineers has been selected to provide engineering services for Task Order 2025-1: Catawba River Water Treatment Plant Expansion Preliminary Engineering Report. Weston & Sampson Engineers was chosen from RFQ - Professional Services for CRWTP Expansion solicited by the joint venture of Union County and Lancaster County Water and Sewer District.

FINANCIAL IMPACT:

The total cost of the Task Order 2025-1 with Weston & Sampson Engineers is \$382,523.00. This total task order amount will be shared equally between Union County and Lancaster County Water and Sewer District, with Union County's financial responsibility being \$191,261.50. Sufficient funds are available within the adopted capital account 60184523 - CRWTP Expansion.

TASK ORDER

NUMBER 2025-1

This Task Order pertains to an Agreement by and between LANCASTER WATER AND SEWER DISTRICT, SOUTH CAROLINA and UNION COUNTY, NORTH CAROLINA, ("OWNER"), and WESTON & SAMPSON ENGINEERS, INC. ("ENGINEER"), dated ____, 2025, ("the Agreement"). ENGINEER shall perform services on the project described below as provided herein and in the Agreement. This Task Order shall not be binding until it has been properly signed by ENGINEER and OWNER. Upon execution, this Task Order shall supplement the Agreement as it pertains to the project described below.

TASK ORDER NUMBER: 2025-1

PROJECT NAME: RFQ: Professional Services for CRWTP Expansion

PART 1.0 PROJECT DESCRIPTION:

The CRWTP is a 40-MGD water treatment facility that provides drinking water to customers of Union County and Lancaster County Water and Sewer District. Due to continually expanding customer base, the parties plan to expand the existing water treatment capacity from 40 MGD to 56 MGD. Alternatives and cost considerations should also be evaluated for “phasing-in” this upgrade or upgrading to a lesser capacity than 56 MGD.

Currently, the facility is an Ultra-Pulsator treatment facility with Greenleaf filtration. Chlorine dioxide is added as a pre-oxidant and chloramines as a final disinfectant. The overall treatment capacity also includes four (4) each 2 MGD pressurized ultrafiltration membranes constructed in a facility with space to expand by +/- 8 MGD of additional membrane treatment. There are two (2) raw water reservoirs on-site in a series arrangement. The original reservoir (approximately 120 MG) serves as a pre-settling basin to the most recent reservoir (approximately 1 BG). Residuals are currently managed with settling and thickening basins and on-site spray fields.

This project will evaluate the alternatives for facility expansion considering the footprint required for this and future expansions. This expansion is anticipated to sustain each Party’s water demands in a fiscally responsible manner for their customers. Due to the increase in demand generated by the expanding customer base, this upgrade must also allow for future expansions of the facility.

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

2.1 Task 1 – Project Kickoff and Management

2.1.1 Develop Request for Information (RFI) to OWNER to request available documentation required to complete the engineering analysis.

2.1.2 Develop draft project execution plan (PEP) for Phase 1 of the project to be discussed during site kickoff meeting. Phase 1 PEP will include a prioritized list of process improvement goals to be further evaluated, a schedule of proposed interactive workshops with OWNER and relevant stakeholders, and an overall delivery schedule of the Phase 1 project deliverables with milestones.

2.1.3 Conduct an on-site project kickoff meeting with OWNER, key project stakeholders, and the technical project team. Lead an interactive planning session with key stakeholders to identify and prioritize desired facility upgrades and process improvements. Participate in a high-level site walkthrough of the existing facility.

2.1.4 Finalize Phase 1 PEP based off feedback from the kickoff meeting.

2.1.5 Conduct monthly coordination meetings with OWNER to review design details and discuss status of project.

Task 1 – Deliverables:

- In-person site visit and kick-off meeting
- Draft and Final Project Execution Plan (PEP)
- Treatment Plant Process Improvement prioritized list of goals
- Agendas, meeting minutes, and other materials (logs, schedules, etc.) as required to facilitate and document project progress

2.2 Task 2 – Additional Water Quality (WQ) Monitoring and Sampling Plan

2.2.1 Obtain, tabulate, and review up to 3 years of available analytical data to understand the water quality across the existing treatment trains at the plant. Locations may include, but are not limited to, raw water, effluent of each unit process, plant finished water, and residuals for each unit process.

2.2.2 Prepare a sampling plan to obtain additional water quality data needed at the plant including PFAS, parameters that may impact PFAS treatment/removal (including but not limited to NOM/TOC, Algae, Metals, Organics, TSS, etc.), and any other parameters presented as a data-gap during the review of the existing analytical data. The sampling plan will include analyzing the

selected parameters in various locations in the plant including, but not limited to the raw water, finished water, and at various points across the existing treatment processes.

Review recommended sampling plan with OWNER and solicit and incorporate OWNER feedback. Provided suggested budget and pricing for the recommended sampling plan to OWNER. OWNER to fund and execute sampling plan.

Tabulate and review additional water quality data obtained from the additional sampling plan. Assume up to five (5) sampling events.

Task 2 – Deliverables:

- Prepare list of data request
- Prepare a technical memorandum outlining the recommended sampling plan for additional data requests – if warranted
- Prepare a technical memorandum documenting the results of the additional sampling effort.

2.2 Task 3 – Existing Conditions Evaluation

2.3.1 Conduct a site visit to assess the existing conditions of the facility. This site visit and requisite work is anticipated to last up to 5 days and will include the following work:

2.3.1.1 Review operations of existing UF membrane units and work with operators to understand the current limitations and challenges with the current process.

2.3.1.2 Review the current method(s) for controlling algae concentrations in the existing reservoirs and throughout the plant and work with operators to understand the current limitations and challenges with the current process.

2.3.1.3 Review existing residuals handling operations and work with operators to understand the current limitations and challenges with the current process (if applicable).

2.3.1.4 Observe and evaluate existing conditions of all major equipment, buildings, utilities, and supporting site/infrastructure previously outlined in the 2018 facility site assessment list and update existing conditions in the list accordingly.

2.3.1.5 Gather information needed to update as-built drawings.

2.3.2 Update existing drawings to reflect as-built conditions.

2.3.3 Perform a site visit to identify resource areas including wetlands prior to field survey. Conduct a site survey of the property in the vicinity of the proposed water plant.

Task 3 – Deliverables:

- Site visits to interview operators and inventory assets
- Updated asset inventory lists
- Updated facility record drawings
- Environmental report summarizing resource areas of concern
- Site survey

2.4 Task 4 – PFAS Evaluation and Planning

2.4.1 Build upon the regulatory review performed as part of the 2018 Facility Master Plan and the March 2023 Union County PFAS Conceptual Treatment Alternatives Analysis. Provide a summary of the current and future regulatory status for PFAS not covered in the previous review. Review existing and pending regulations and amendments issued by the Environmental Protection Agency (EPA), South Carolina Department of Environmental Services (SC DES), and North Carolina Department of Environmental Quality (NC DEQ).

2.4.2 Lead interactive workshop – “PFAS Development of Solutions”

- Determine PFAS compounds of interest (just EPA/SC and NC regulated components or any unregulated PFAS of interest)?
- Identify OWNER’s PFAS mitigation strategy (i.e. under MCL, meet MCLG, ND for all PFAS).
- Identify OWNER’s treatment preferences (i.e. operational longevity, capital costs vs operational costs, etc.)

2.4.3 PFAS Pilot Protocol & Pilot – following the PFAS Planning workshop prepare summarize discussions and findings and prepare outline for protocol for piloting.

Task 4 – Deliverables:

- PFAS Planning Workshop
- Provide update to the March 2023 Union County PFAS Conceptual Treatment Alternatives Analysis and the 2018 Facility Master Plan PFAS treatment alternatives chapter of PER based on the workshop findings.
- PFAS Pilot Protocol – if warranted

2.5 Task 5 – Facility Planning

2.5.1 Perform useful life analysis of existing equipment and infrastructure using the methodology outlined in the 2018 Facility Master Plan.

2.5.2 Incorporate the findings from the existing conditions evaluation into the PEP list developed during the kick-off meeting. Work with OWNER to refine the list of upgrades and improvements to be further evaluated during Phase 1.

2.5.3 Lead Interactive Workshop – Facility Planning

2.5.3.1 20-year planning period

2.5.3.2 Space programming for additional administration space needs such as offices, break-room, conference room, laboratory, maintenance and equipment storage workshop space.

2.5.3.3 Review existing plant building for upgrades including parking lot paving, windows and doors to bring up to current safety code as well as risk and resiliency plan suggestions.

2.5.3.4 Strategy for membranes and existing building space including review of membrane alternatives

2.5.3.5 Process Improvements for additional plant capacity

2.5.3.6 Review of raw water quality and taste and odor impacts as well as improvements

2.5.3.7 Electrical service review

2.5.3.8 Distribution pumping and storage and plant hydraulics

2.5.3.9 Review old spare pump station for use as redundant station. Provide recommendations for improvement

2.5.3.10 Review generator and provide recommendations for improvement

Task 5 – Deliverables:

- Updated Treatment Plant Process Improvement prioritized list of goals
- Facility Master Planning Workshop
- Updated PEP
- Facility Master Plan Chapter of PER

2.6 Task 6 – Algae Management and Reservoir Modeling

2.6.1 Review existing reservoir design of the reservoir system to aid in further understanding how water moves through the reservoir. Identify potential areas of short-circuiting or areas where mixing needs to be improved.

2.6.2 Conduct interactive workshop with OWNER to determine the preferred strategies for managing algae concentrations in the existing reservoir and at the plant. Discuss the potential options including but not limited to, increasing the algae monitoring frequency to improve response time, relocating the raw water intake, improving reservoir mixing, and/or adding or modifying source water treatment. Collectively with OWNER, determine up to three options to be further analyzed.

2.6.3 Evaluate up to three (3) options for algae management based on input provided by the OWNER during the interactive workshop. Perform preliminary sizing calculations and prepare a high-level conceptual layout for each option.

Task 6 – Deliverables:

- Reservoir workshop
- Reservoir improvement alternatives Chapter of PER

2.7 Task 7 – Treatment Alternatives Analysis

2.7.1 Review the pros and cons of utilizing the existing UF membrane units in the future. Provide suggestions for improving performance of UF membranes if appropriate. Evaluate utilizing ceramic membranes and compare benefits and drawbacks compared with existing UF membranes. Evaluate decommissioning the UF membranes and replacing with a different technology.

2.7.2 Evaluate filtration alternatives and/or options for retrofitting the Greenleaf filters with up to 3 different media configurations.

2.7.3 Evaluate up to three (3) options for PFAS treatment based on input provided by the OWNER during the interactive workshop. Perform preliminary sizing calculations and prepare a high-level conceptual layout for each option.

2.7.4 Evaluate existing residuals handling and spray application facilities and determine if additional capacity is required. Provide up to two (2) alternatives for residuals handling for the additional plant capacity with the pros and cons of both.

2.7.5 For Tasks 2.7.1 through 2.7.4, develop a high-level alternatives matrix in Excel outlining the benefits and challenges associated with each option and ranking each option based on treatment effectiveness, estimated capital cost, estimated ongoing maintenance cost, ease of operation, and anticipated construction duration.

2.7.6 Prepare and present alternatives to OWNER if appropriate to narrow down choices that would be further evaluated and costs prepared. The presentation will include a summary of each option, preliminary sizing and layouts (as applicable), and a review of the Excel alternatives

matrix. Following the presentation, OWNER will work to finalize the options to be further developed in the preliminary engineering report.

Task 7 – Deliverables:

- Prepare Alternatives Analysis for plant improvements

2.8 Task 8 – Phase 1 Preliminary Engineering and Report

2.8.1 Review the feasibility of increasing the existing plant capacity from 40 MGD to approximately 56 MGD. Determine if a phased approach is needed to expand the plant capacity by 16 MGD. Review existing plant hydraulics to identify bottlenecks in the existing plant. Update the hydraulic profile to reflect existing conditions in the plant.

2.8.2 Perform preliminary sizing calculations to determine what additional pumping capacity is needed in the raw water and finished water systems, including membranes if appropriate.

2.8.3 Evaluate the capacity of the existing rapid mix tanks to determine if new rapid mix tank(s) are needed or if the existing rapid mix tanks can be modified to accommodate the additional 16 MGD capacity. Determine if chemical dosing strategy upstream of the rapid mix tank needs to be modified based on proposed PFAS treatment technology(s) or algae management strategy(s) selected.

2.8.4 Review feasibility of expanding the UltraPulsator and Greenleaf filter capacity by adding additional unit(s). Perform preliminary unit sizing and review any potential impacts to future performance based on the PFAS treatment technology(s) or algae management strategy(s) selected.

2.8.5 Evaluate the updated powder activated carbon (PAC) usage based on the treatment technology(s) selected for PFAS removal and algae management, if applicable. Prepare preliminary sizing calculations, layout, and location for upgraded PAC storage and dosing equipment.

2.8.6 Perform preliminary sizing calculations for the chemical feed systems needed for the expanded 16 MGD capacity. Determine if any other chemical feed system upgrades are needed for the existing 40 MGD plant.

2.8.7 Determine the additional Clearwell storage capacity required for the expanded facility and provide recommendations of where to install the new storage vessels.

2.8.8 Provide up to two (2) options of overall site layouts for the proposed facility expansion. Include phasing recommendations for each layout, if applicable. Provide strategies for future expansion of the plant beyond the current expansion to 56 MGD if appropriate.

2.8.9 Prepare engineering estimates of construction and capital costs associated with each layout option, including each phase if applicable.

2.8.10 Prepare a permitting outline for the proposed plant expansion. Identify the list of required permits from the South Carolina Department of Environmental Services (SC DES), North Carolina Department of Environmental Quality (NC DEQ), US Army Corps of Engineers, and other applicable agencies. Include an estimate of permitting costs and approximate schedule for obtaining the permits for the plant expansion.

2.8.11 Provide a regulatory assessment of existing treatment processes and confirm that existing and proposed treatment processes will meet existing regulations. Identify if any existing or proposed treatment process pose a risk to pending regulations or amendments to existing regulations.

2.8.12 Provide a summary of any future piloting and/or sampling recommendations to aid in the final design of the plant expansion.

2.8.13 Prepare a report summarizing the findings from the Phase 1 engineering effort. Include a construction feasibility plan that allows the existing facilities at the CRWTP to remain in full operation throughout the entire construction duration. Provide a construction timeline for the plant expansion.

2.8.14 Meet with OWNER to review Phase 1 Preliminary Engineering report.

2.8.15 Revise the Phase 1 Preliminary Engineering report up to one (1) time based on OWNER's comments.

Task 8 – Deliverables:

- DRAFT and Final Preliminary Engineering Report

PART 3.0 ADDITIONAL SERVICES, NOT PART OF BASIC SERVICES:

PART 4.0 OWNER'S RESPONSIBILITIES:

PART 5.0 PERIODS OF SERVICE:

Eight (8) Months from executed Agreement/Task Order.

PART 6.0 PAYMENTS TO ENGINEER:

The ENGINEER will be compensated on a per diem (hourly rate) not to exceed \$382,523.00 as outlined below.

Task 1 Project Kickoff and Management	\$64,742.00
Task 2 Additional Water Quality (WQ) Monitoring and Sampling Plan	\$22,942.00
Task 3 Existing Conditions Evaluation	\$92,226.00
Task 4 PFAS Evaluation and Planning	\$11,960.00
Task 5 Facility Planning	\$32,300.00
Task 6 Algae Management and Reservoir Monitoring	\$36,481.00
Task 7 Treatment Alternatives Analysis	\$40,028.00
Task 8 Phase 1 Preliminary Engineering Report	\$81,844.00

All hourly rate work will be charged based upon the personnel classifications performing the work and corresponding hourly rate set forth in Attachment A, which is attached and incorporated herein by reference.

An estimated breakdown of the hourly effort is outlined in Attachment B, which is attached and incorporated herein by reference.

PART 7.0 OTHER:

This Task Order is executed this ____ day of _____, 2025.

ENGINEER

By: _____

Name: Leah Stanton

Title: Vice President

Address: 911 Norman Alley
Conway, SC 29626

UNION COUNTY,
NORTH CAROLINA

LANCASTER COUNTY WATER AND SEWER
DISTRICT, SOUTH CAROLINA

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____

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

Address: 1400 Pageland Highway
Lancaster, SC 29720

Approved as to Legal Form:

BTI

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

Deputy Finance Officer

Attachment A
Hourly Rates

EMPLOYEE TITLE	BILLING RATE
Principal In Charge - VP	\$350.00
Senior Technical Specialist	\$231.00
Senior Project Administrator	\$188.00
Project Manager 1	\$169.00
Front Desk Coordinator	\$95.00
Senior Resident Representative	\$152.00
Senior Designer	\$196.00
Resident Representative	\$108.00
Senior Structural Engineer	\$320.00
Project Manager 1	\$187.00
Senior Resident Representative	\$150.00
Senior Civil Designer	\$141.00
Senior Project Manager	\$257.00
Technical Project Coordinator	\$128.00
Principal Engineer	\$328.00
Senior Project Engineer	\$169.00
Senior Technical Leader	\$290.00
Senior Process Engineer	\$190.00
Engineer 3	\$140.00



Attachment B

Level of Effort and Cost Table

Project Name: LCWSD/Union County-Catawba River WTP Expansion Project

	Labor									
	Brown, Timothy Senior Technical Specialist		Carter, Dickie Senior Technical Specialist		Carter, Vicki Senior Project Admininstrator		Comeau, John Senior Team Leader		Dixon, William Senior Structural Engineer	
Project Structure	Hours	Bill	Hours	Bill	Hours	Bill	Hours	Bill	Hours	Bill
A - PER	36.00	8,316			12.00	2,256				
B - PHASE B - ADDTL WQ MONITORING & SAMPLING	16.00	3,696			4.00	752				
C - PHASE C - EXISTING CONDITIONS EVAL	60.00	13,860	40.00	9,240	16.00	3,008			16.00	5,120
D - PHASE D - PFAS EVAL & PLANNING	8.00	1,848			8.00	1,504				
E - PHASE E - FACILITY PLANNING	20.00	4,620			8.00	1,504	16.00	4,640		
F - PHASE F - ALGAE MANAGEMENT & RESERVOIR	15.00	3,465			2.00	376				
G - PHASE G - TREATMENT ALTERNATIVES	20.00	4,620			8.00	1,504				
H - PHASE H - PER	40.00	9,240	16.00	3,696	24.00	4,512	8.00	2,320	8.00	2,560
Total	215.00	49,665	56.00	12,936	82.00	15,416	24.00	6,960	24.00	7,680



Attachment B

Level of Effort and Cost Table

Project Name: LCWSD/Union County-Catawba River WTP Expansion Project

Labor											
Kearnan, Aaron Engineer III		McGougan, Jessica Senior Project Manager		McGougan, Joseph Principal Engineer		Reid, Andrew Senior Technical Leader		Stanton, Leah Chief Operating Officer		Terravecchia, Gianna Senior Process Engineer	
Hours	Bill	Hours	Bill	Hours	Bill	Hours	Bill	Hours	Bill	Hours	Bill
		26.00	6,682	16.00	5,248	52.00	15,080	10.00	3,500	64.00	12,160
40.00	5,600			8.00	2,624	8.00	2,320	1.00	350	40.00	7,600
				16.00	5,248	20.00	5,800	4.00	1,400	80.00	15,200
		8.00	2,056	4.00	1,312	8.00	2,320	4.00	1,400	8.00	1,520
20.00	2,800			12.00	3,936	20.00	5,800	4.00	1,400	40.00	7,600
40.00	5,600			10.00	3,280	16.00	4,640	1.00	350	8.00	1,520
40.00	5,600			18.00	5,904	20.00	5,800	4.00	1,400	80.00	15,200
60.00	8,400	24.00	6,168	16.00	5,248	40.00	11,600	4.00	1,400	80.00	15,200
200.00	28,000	58.00	14,906	100.00	32,800	184.00	53,360	32.00	11,200	400.00	76,000



Attachment B

Level of Effort and Cost Table

Project Name: LCWSD/Union County-Catawba River WTP Expansion Project

Labor		Reimb. Expenses	Reimb. Consultants	Total
Total		Total	Total	
Hours	Bill	Bill	Bill	Bill
216.00	53,242	11,500		64,742
117.00	22,942			22,942
252.00	58,876		33,350	92,226
48.00	11,960			11,960
140.00	32,300			32,300
92.00	19,231		17,250	36,481
190.00	40,028			40,028
320.00	70,344		11,500	81,844
1,375.00	308,923	11,500	62,100	382,523



Union County, NC

Staff Report

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

File #: 25-698

Agenda Date: 11/17/2025

TITLE:

Bid Award - Waxhaw North Sanitary Sewer Replacement & Rehabilitation

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Adopt Resolution for Tentative Award of the Waxhaw North Sanitary Sewer Replacement & Rehabilitation project construction, 2) contingent upon North Carolina Department of Environmental Quality's issuance of the Authority to Award, award contract to North American Pipeline Management, LLC in the amount of \$3,138,610.00; 3) 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; and 4) adopt Resolution Providing Notice of Construction of the Waxhaw North Sanitary Sewer Replacement & Rehabilitation project.

PRIOR BOARD ACTIONS:

- 1) March 1, 2021, Regular Meeting, Agenda Item #4 - Approved WK Dickson Task Order 2021-01 for engineering field assessment and preliminary design services for the project in an amount of \$104,850.00.
- 2) March 20, 2023, Regular Meeting, Agenda Item #23-057 - Approved WK Dickson Task Order 2021-09 for final design, permitting, and bidding services in an amount of \$135,509.00.
- 3) August 12, 2024, Regular Meeting, Agenda Item #24-530 - Adopted resolution accepting Appropriations Act (S.L. 2023-134) funding in the amount of \$1,477,500.00 from the North Carolina Department of Environmental Quality Division of Water Infrastructure and authorized the County Manager to execute all necessary documentation related to the acceptance.

BACKGROUND:

The Capital Improvement Plan (CIP) includes an annual allocation in the Wastewater Rehabilitation & Replacement Program to assess, prioritize, and rehabilitate/replace sanitary sewer collection system infrastructure. This project is Year 1 of a two-year rehabilitation project to replace the aged Septic Tank Effluent Gravity (STEG) wastewater collection system in Waxhaw. This Year 1 project consists of the replacement of approximately 4,500 linear feet of 4-inch and 6-inch sewer lines with 8-inch and 10-inch sewer mains in the Waxhaw downtown area on the north side of Highway 75.

On August 21, 2025, the Procurement Department partnered with Union County Water (UCW) to issue an Invitation for Bid IFB 2024-083 Waxhaw North Sanitary Sewer Replacement & Rehabilitation project. On October 2, 2025, two (2) bids for the title project were received. Since fewer than three

(3) bids were received, the submitted bids were returned to the bidders unopened.

On October 3, 2025, the Procurement Department partnered with Union County Water to re-issue an Invitation for Bid IFB 2024-083 (Rebid) Waxhaw North Sanitary Sewer Replacement & Rehabilitation project. On October 14, 2025, one (1) bid for the title project was received and processed. All bids were tabulated, reviewed and certified by Ardurra (previously WK Dickson). The single bid was in the amount of \$3,138,610.00; staff recommends that the project be awarded to the lowest, responsive, responsible bidder, North American Pipeline Management, LLC, in the amount of \$3,138,610.00.

FINANCIAL IMPACT:

Funding is available within the adopted capital account 60185522 - STEG Assessment Waxhaw to support the construction contract amount of \$3,138,610.00.



OCTOBER 29, 2025

MR. NATHANIEL GROVE
SENIOR ENGINEER | CAPITAL IMPROVEMENT PROGRAM
UNION COUNTY WATER
500 N. MAIN STREET, SUITE 600
MONROE, NORTH CAROLINA 28112

SUBJECT: IFB# 2024-083Rebid Waxhaw North Sanitary Sewer Replacement & Rehabilitation
Project Number: 20230277.00.CL
Bid Tabulation and Recommendation

Dear Mr. Grove:

Enclosed is the Certified Bid Tabulation for the referenced project. One bid was submitted. The one bidder is North American Pipeline Management, LLC (NAPM), of Marietta, Georgia. The bid was found to be free of mathematical errors or oversights and appears to be complete and compliant with the Contract Documents.

I have worked with NAPM on previous projects as a consultant Project Manager and Construction Contract Administrator. In my experience, NAPM successfully executed and delivered similar projects for public utility and local government owners, including Winston-Salem/Forsyth County Utilities and The City of Lancaster, South Carolina.

In effort to evaluate the Contractor's responsiveness beyond my firsthand experience, many of the listed references were contacted. I spoke with a professionally licensed Project Manager, a Local Government Official, and an owner's representative/inspector, all of whom worked with NAPM on previous projects. References I spoke with were involved in the design and/or construction contract administration of utility replacement and rehabilitation projects in Columbia, SC, Apex, NC, Norwood, NC, and Pilot Mountain, NC. All references contacted shared generally positive feedback regarding NAPM. References specifically spoke about NAPM's high quality of workmanship and collaborative approach to construction alternatives analyses and change management.

I also spoke with NAPM's Operations Manager and Senior Project Manager to further evaluate their understanding of the project and planned approach to the specific elements and nature of this project. I understand their superintendent visited the project site during the bidding process



to become familiar with the Town and specifics of the project environment ahead of submitting their bid. Throughout my efforts and discussions, I found no issues of concern regarding NAPM's ability to perform the scope of work and deliver a successful outcome for Union County Water on this project.

Based on the information outlined above, I herein declare North American Pipeline Management, LLC. to be a responsive and responsible bidder.

Based on the results of this Bid and the information we have received at this time, I recommend Union County award the contract to North American Pipeline Management, LLC. in the amount of \$3,138,610.00, equating to their Total Bid Price (Total Base Bid + Alternate 1 + Alternate 2).

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

Sincerely,

ARDURRA

Jake Berkshire, PE

Project Manager

Enclosures (1)

C: Caleb Brehm, PE – Project Engineer, ARDURRA

James T. Lyon, PE – Engineering Manager, ARDURRA

BID TABULATION**Waxhaw Sanitary Sewer Replacement & Rehabilitation**

Union County

REBID DATE: October 14, 2025

ARDURRA# 20230277.00.CL

North American Pipeline Management,
LLC

PO Box 683638

Marietta, GA 30068

License No. 70877

Item No.	Description	Unit	Quantity	Unit Price	Extended Total
General Work:					
1	Mobilization (Max 5% of Base Bid)	LS	1	\$125,000.00	\$125,000.00
2	Pre-Construction CCTV (4" Sewer)	LF	820	\$10.00	\$8,200.00
3	Pre-Construction CCTV (6" Sewer)	LF	3,100	\$5.00	\$15,500.00
4	10" DR9 HDPE Gravity Sewer (by Pipe Bursting) (0-6 ft depth)	LF	160	\$320.00	\$51,200.00
5	10" DR9 HDPE Gravity Sewer (by Pipe Bursting) (6-10 ft depth)	LF	2,800	\$340.00	\$952,000.00
6	10" DR9 HDPE Gravity Sewer (by Pipe Bursting) (10+ ft depth)	LF	890	\$445.00	\$396,050.00
7	8" PVC SDR 26 Gravity Sewer (by Open Cut) (0-6 ft depth)	LF	95	\$320.00	\$30,400.00
8	8" PVC SDR 26 Gravity Sewer (by Open Cut) (6-10 ft depth)	LF	65	\$340.00	\$22,100.00
9	8" PVC SDR 26 Gravity Sewer (by Open Cut) (10+ ft depth)	LF	10	\$445.00	\$4,450.00
10	8" DIP Outside Drop Connection	EA	2	\$16,375.00	\$32,750.00
11	Service Lateral Tie In to Sewer Main (0-6 ft depth)	EA	2	\$6,000.00	\$12,000.00
12	Service Lateral Tie In to Sewer Main (6-10 ft depth)	EA	24	\$7,650.00	\$183,600.00
13	Service Lateral Tie In to Sewer Main (10+ ft depth)	EA	7	\$9,000.00	\$63,000.00
14	4' Diameter Precast Concrete Manhole (0-6 ft depth)	EA	1	\$15,000.00	\$15,000.00
15	4' Diameter Precast Concrete Manhole (6-10 ft depth)	EA	2	\$17,000.00	\$34,000.00
16	4' Diameter Precast Concrete Manhole (10+ ft depth)	EA	1	\$19,000.00	\$19,000.00
17	Repair 4' Diameter Manhole Bench and Invert	EA	22	\$1,200.00	\$26,400.00
18	4" PVC Service Lateral (By Open Cut)	LF	400	\$150.00	\$60,000.00
19	6" PVC Service Lateral (By Open Cut)	LF	30	\$150.00	\$4,500.00
20	4" PVC Service Lateral (By Pipe Bursting)	LF	400	\$125.00	\$50,000.00
21	6" PVC Service Lateral (By Pipe Bursting)	LF	30	\$125.00	\$3,750.00
22	Cleanout Assembly	EA	35	\$1,200.00	\$42,000.00
23	Abandonment/Removal of Existing Septic Tank	EA	11	\$5,250.00	\$57,750.00
24	Abandon Existing 4' Diameter Manhole	EA	2	\$4,200.00	\$8,400.00
25	Flowable Fill	CY	900	\$275.00	\$247,500.00
26	Concrete Sidewalk Replacement	SY	80	\$170.00	\$13,600.00
27	Driveway Concrete Replacement	SY	70	\$190.00	\$13,300.00
28	Driveway Gravel Repair	SY	70	\$60.00	\$4,200.00
29	Driveway Asphalt Repair	SY	20	\$145.00	\$2,900.00
30	Road Asphalt Repair	SY	760	\$156.00	\$118,560.00
31	Erosion Control	LS	1	\$25,000.00	\$25,000.00
32	Erosion Control Maintenance (per Month)	EA	8	\$1,250.00	\$10,000.00
33	Seeding, Mulching, Site Grading, and Landscape Restoration	LS	1	\$30,000.00	\$30,000.00
34	Traffic Control	LS	1	\$110,000.00	\$110,000.00
Total Base Bid					\$2,792,110.00
Alternate 1 – Mill & Overlay					
35	Asphalt Milling – 2.0"	SY	3,400	\$10.00	\$34,000.00
36	Asphalt Overlay – 2.0"	TON	380	\$350.00	\$133,000.00
Add for Alternate 1					\$167,000.00
Alternate 2 - Additional Mill & Overlay (Additional on N Church St.)					
37	Asphalt Milling – 2.0"	SY	3,600	\$10.00	\$36,000.00
38	Asphalt Overlay – 2.0"	TON	410	\$350.00	\$143,500.00
Add for Alternate 2					\$179,500.00
Total Bid (Base Bid + Alternate 1 + Alternate 2)					\$3,138,610.00

I hereby certify that the above is a true and correct
(to the best of my knowledge) tabulation of bids received on October 14, 2025.

Jake Berkshire, PE

ARDURRA

10/23/25



**RESOLUTION OF THE UNION COUNTY BOARD OF COMMISSIONERS FOR TENTATIVE AWARD OF THE
WAXHAW NORTH SANITARY SEWER REPLACEMENT & REHABILITATION PROJECT**

WHEREAS, bids were received, pursuant to duly re-advertisement notice on October 3, 2025, therefore, for construction of the Waxhaw North Sanitary Sewer Replacement & Rehabilitation project; and

WHEREAS, the Engineer of Record, Ardurra, has reviewed the bids; and

WHEREAS, North American Pipeline Management, LLC was the lowest responsive, responsible bidder for the Waxhaw North Sanitary Sewer Replacement & Rehabilitation project, in the total bid amount of \$3,138,610.00; and

WHEREAS, the Engineer of Record recommends Tentative Award to the lowest responsive, responsible bidder, North American Pipeline Management, LLC.

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

1. That Tentative Award is made to the lowest responsive, responsible bidder, North American Pipeline Management, LLC in the total bid amount of \$3,138,610.00.
2. That Tentative Award is contingent upon the approval of the North Carolina Department of Environmental Quality by issuance of the Authority to Award.

Adopted this the 17th day of November 2025.

Attest:

Lynn West
Clerk to the Board

Melissa Merrell
Chair Union County Board of Commissioners

**RESOLUTION OF THE UNION COUNTY BOARD OF COMMISSIONERS PROVIDING NOTICE OF
WAXHAW NORTH SANITARY SEWER REPLACEMENT & REHABILITATION PROJECT CONSTRUCTION**

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

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

WHEREAS, the Union County Board of Commissioners desires to give notice of construction of the Waxhaw North Sanitary Sewer Replacement & Rehabilitation Project prior to commencement of project construction as required by G.S. § 153A-457.

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

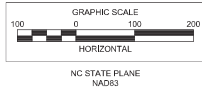
1. Union County may commence construction of the Waxhaw North Sanitary Sewer Replacement & Rehabilitation Project on property as shown on the attached map after the award date of the construction contract for the project.
2. This resolution and notice is adopted in accordance with the construction notice requirements of G.S. § 153A-457.

Adopted this the 17th day of November, 2025.

Attest:

Lynn West
Clerk to the Board

Melissa Merrell
Chair, Union County Board of Commissioners



PROJ. MGR.:	JRB
DESIGN BY:	BWK
DRAWN BY:	JDH/CMB
PROJ. DATE:	AUG 2025
DRAWING NUMBER:	
G.2	
WKD PROJ. NO.:	
20230277.00.CL	



Union County, NC

Staff Report

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

File #: 25-701

Agenda Date: 11/17/2025

TITLE:

Contract Amendment - GIS Managed Services

INFORMATION CONTACT:

Luke Fawcett, Union County Water, Planning & Resource Management Assistant Director, 704-296-4237

ACTION REQUESTED:

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

January 6, 2025, Regular Meeting, Agenda Item #24-879 - Contract Amendment - GIS Managed Services

BACKGROUND:

GIS Managed Services refers to the cloud-hosted, vendor-supported infrastructure used to power Union County Water's geospatial systems and tools. In December 2021, Union County first partnered with ROK Technologies to provide a managed ArcGIS Enterprise environment hosted in AWS. This decision was driven by the increasing demands on GIS infrastructure and the growing role of geospatial data in utility operations.

This amendment is required to extend and update the cost increase by \$5,952 for the AWS cloud services that Rok Technologies manages for Union County.

Rok Technologies manages to cloud services that support Union County Water's operational web maps, work applications, data warehousing, integrations, and analytical functions.

FINANCIAL IMPACT:

The pricing for the Services for the Extended Term of one year is \$163,872.00 which will be funded by Union County Water enterprise fund. Funding is available within approved FY26 operating budget.

STATE OF NORTH CAROLINA

AMENDMENT #4

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 “Client,” and ROK TECHNOLOGIES, LLC, a South Carolina limited liability company, hereinafter referred to as “ROK Technologies,” shall modify as indicated that agreement between the parties dated September 20, 2021, as amended, hereinafter referred to as the “Agreement.”

W I T N E S S E T H:

WHEREAS, ROK Technologies and Client entered into an Agreement pursuant to which ROK Technologies would provide Client with implementation and managed services related to and in support of Client’s AWS environment and Esri ArcGIS® Enterprise software (the “Services”); and

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

WHEREAS, ROK Technologies is willing to continue to provide the Services during the extended term.

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

1. The parties agree to extend the term of the Agreement for one (1) year, beginning December 1, 2025, and ending November 30, 2026 (the “Extended Term”).
2. The parties further agree that the pricing for the Services for the Extended Term shall be \$13,656.00 per month, with the annual amount not to exceed \$163,872.00.
3. This Amendment shall be governed by the terms of the Master Service Agreement (“MSA”) and Service Level Agreement (“SLA”) between the parties dated September 20, 2021, as amended, including Exhibit A to the MSA and SLA. The MSA, SLA and related amendments are attached hereto and incorporated herein by reference.
4. Except as herein amended, the terms and provisions of the Agreement shall remain in full force and effect.
5. Each signatory below warrants that it has the corporate or other organizational power and authority to execute, deliver and perform this Amendment. Each signatory further warrants that the execution, delivery and performance by it of this Amendment and the Agreement has been duly authorized and approved by all requisite action of the party’s management and appropriate governing body.

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

UNION COUNTY

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

ROK TECHNOLOGIES, 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

1 Carriage Lane Suite B-201 | p 888-898-3404 | f 843.225-1813 | info@ROKtech.net



County of Union, NC Public
Works

Master Services Agreement

Version 1 | 9/7/2021

Master Services Agreement

September 20, 2021

This Master Services Agreement (the “**MSA**”) is effective as of **September 1, 2021** (the “**Effective Date**”) by and between ROK Technologies, LLC (“**ROK**”) and Union County, NC (“**Client**”). ROK and Client are each individually referred to herein as a “**Party**” and collectively as the “**Parties**.” This MSA shall govern the Parties’ relationship as more fully described in Statements of Work (each, an “**SOW**”) agreed upon between the Parties pursuant to the terms of this MSA. This MSA anticipates the execution of various written SOWs and the following terms shall apply to such SOWs. The MSA, SOW and all exhibits, addendums and/or amendments thereto are collectively referred to herein as the “**Agreement**.”

1. RECITALS.

- A. ROK is in the business of architecting, hosting and managing the infrastructure for geographical information system—or “GIS”—computing systems for its business clients.
- B. Client seeks to hire ROK to provide certain Services in relation to Client’s own GIS Platform, and ROK desires to provide the same pursuant to the terms and conditions of this Agreement.
- C. NOW, THEREFORE, in consideration of the mutual covenants, terms, and conditions set forth herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

2. SELECT DEFINITIONS.

- A. “**Client’s Platform**” or the “**Platform**” means the collection of Client data and applications managed by ROK pursuant to this Agreement.
- B. “**Managed Services**” means the management of Client’s Platform by ROK pursuant to a Service Level Agreement.
- C. “**Non-Tenant**” means Client if Client’s Platform is not hosted by ROK—for example, if Client engages a third-party cloud service provider such as AWS or Azure, or, uses on-premises or similar Client-owned equipment to host Client’s Platform and contracts with ROK for Managed Services only.
- D. “**Professional Services**” means any and all Services rendered by ROK to Client pursuant to an SOW other than Managed Services, such as consultation, data assessment and recommendations, and so forth.
- E. “**Services**” means any and all Services rendered by ROK to Client pursuant to an SOW, including all Managed Services and Professional Services.
- F. “**Tenant**” means Client if Client’s Platform is hosted by ROK on ROK’s cloud-based systems.
- G. “**Service Level Agreement**” or “**SLA**” means a type of SOW that sets forth the specific terms applicable to ROK’s provision of Managed Services.

3. SERVICES.

- A. **Services.** Services will be provided by ROK pursuant to the terms and conditions of this Agreement and any applicable SOW—including, where applicable, a Service Level Agreement.
- B. **Subcontractors.** ROK may use subcontractors (under separate contract to ROK) to perform the Services, or portion(s) thereof.

4. SOWs.

- A. **Form of SOW.** ROK will not proceed with performing Services until both Client and ROK have signed the applicable SOW. Each SOW, once signed by both Parties, will become a part of this Agreement. Each SOW must be in writing and should include, at a minimum:
 - i. Description of Services and deliverables in sufficient detail to gauge the successful progress and completion of the Services;
 - ii. Period of duration, expected date(s) of completion (by phase/milestone or entire project) or delivery of deliverables, and/or other performance timetable;
 - iii. If applicable, designated means of performance, including identification of any particular roles or individuals required to participate in the Services;
 - iv. Resources required from Client for performance of the Services, such as access to

particular information, systems, or environments, involvement of specific personnel, and so forth;

- v. If applicable, acceptance criteria and testing period, permissible reasons for rejection and ROK's duty to remedy the same, if any;
- vi. Fees owed to ROK for the Services, along with method of computation (e.g., fixed fee or hourly rate) and timing/conditions of payment (e.g., milestone-based);
- vii. Description and estimated amounts of any significant reimbursable expenses expected to be incurred; and
- viii. Identification of the Client department responsible for overseeing the project and Client employee designated as project owner.

- B. **Amendment.** SOWs may only be amended by a written document signed by each Party's authorized representative, and per the change management procedures set forth therein.
- C. **Governance.** Each SOW will, upon execution by both of the Parties hereto, be incorporated into and become part of this Agreement. In the event of any conflict between this Agreement and any SOW, the terms and conditions of the applicable SOW shall control as to the specific deliverables and Services addressed in said SOW, and this Agreement shall control as to all other matters.

5. PRICING.

- A. **Pricing.** Prices for Services will be specified in one of the following, as applicable to the Services to be provided:
 - i. Those specified in ROK's then-current price list, less any applicable discount at the time of ROK's acceptance of an SOW;
 - ii. Those specified in a written price quotation submitted by ROK; or
 - iii. Those specified in the SOW; or
 - iv. Incidental extra fees agreed-upon by the Parties from time to time (for example, additional work authorized outside business hours or weekends).
 - 1. Premium rates outside normal business hours during the business week will be billed at one and one-half times the agreed upon labor rate.
 - 2. Premium rates on weekends and us holidays will be billed at twice the agreed upon labor rate.
- B. **Taxes.** All prices are exclusive of any taxes, fees, duties or other applicable amounts. Client shall pay the taxes related to Services purchased pursuant to this Agreement, or Client shall present an exemption certificate acceptable to the taxing authorities. Applicable taxes, if any, will be billed as a separate item on the invoice. ROK reserves the right to increase the fees for Services in the event Client determines any withholding tax obligation prevents ROK from receiving the specified prices for such Services pursuant to Section 5(a) above.

6. PAYMENT AND INVOICING.

- A. **Payment.** Unless otherwise indicated in an SOW, payment terms are due 30 days from receipt of an accurate invoice. Any sum not paid by Client within sixty (60) days from the date of the invoice will bear interest from the date of the invoice until paid at a rate of: (i) ten (10) per cent per annum or (ii) the maximum rate permitted by law, whichever is less. All payments are conditioned upon appropriation by the Union County Board of Commissioners of sufficient funds for each request for services.
- B. **Invoicing.** As set forth below, ROK will invoice Client depending on the type of Services:
 - i. For Managed Services, unless otherwise agreed by the Parties in the applicable SOW, ROK will invoice Client for such Services, and payment will be due, in advance of performance of the same.
 - ii. For Professional Services, ROK will invoice Client per the SOW's invoicing schedule. Invoices may contain multiple milestones or a single invoice at the start or end of the project. Unless otherwise mutually agreed upon in writing or via a change management procedure, the total invoiced amounts for SOW milestones shall not exceed the total amount agreed upon in the SOW. If a SOW does not contain a milestone schedule, ROK will invoice

Professional Services performed under such SOW as set forth in such SOW.

- C. **Deposit.** ROK reserves the right to charge Client a deposit for payment on any SOW.
- D. **Disputed Charges.** Written notice of any disputed charge must be received by ROK within 20 days of the date of issuance of the invoice in question or Client forfeits the right to dispute the charge. This notice must include the invoice number in dispute, the item(s) and amount(s) disputed and a complete description of the basis for Client withholding payment. Notice of any disputed charge does not release Client from the obligation of paying any remaining balance of the invoice under the terms specified. Upon resolution of the disputed charge, ROK will issue a credit memo or Client will pay the total amount outstanding referenced by the dispute.
- E. **Collections.** If payment has not been received within the three-month period after the due date, ROK will have no other option but to undertake collection and enforcement efforts. If collection and enforcement efforts are undertaken by ROK, Client shall be liable for all costs thereof, including reasonable attorneys' fees. If Client is in arrears on any invoice, ROK may, upon giving notice, apply any deposit thereto and suspend, withhold or terminate further performance of Services until all arrearages are brought current.

7. TERM AND TERMINATION.

- A. **Term.** The term of this Agreement will commence on the Effective Date and, unless terminated pursuant to this Section 7, shall remain in effect until the later of one (1) year after the Effective Date or (2) sixty (60) days after completion of all rights and obligations by each Party under any SOW, so long as no other SOWs are outstanding.
- B. **Termination.** This Agreement, and any Services being performed hereunder, may be terminated immediately by either Party upon written notice:
 - i. If the other Party breaches any of the material provisions of this Agreement and the breach is not capable of being cured or after providing thirty (30) days written notice to the breaching Party if the breaching Party fails to cure such breach within such period;
 - ii. If the other Party: ceases, or threatens to cease to carry on business as a going concern; or becomes or may become the object of the institution of voluntary or involuntary proceedings in bankruptcy or liquidation, or a receiver or similar officer is appointed with respect to the whole or a substantial part of its assets; or an event similar to any of the foregoing occurs under applicable law;
 - iii. If, except as provided below, either Party assigns (by operation of law or otherwise, including merger) or transfers any of the rights or responsibilities granted under this Agreement, any support agreement, or any SOW, without the prior written consent of the other Party, or in the event of a sale of all or substantially all of such Party's assets, or transfer of a controlling interest in such Party to an unaffiliated third Party. Notwithstanding the foregoing: ROK reserves the right to subcontract Services to any affiliate or third-party organization to provide Services to Client, and ROK may assign this Agreement or all or any portion of its rights and obligations hereunder, to any affiliate of ROK; and/or
 - iv. If fees are not paid when due and payment has not been received within thirty (30) days after notice from ROK to Client of such past due payment, ROK may suspend or withhold the provision of Services until all amounts past due are paid in full, and/or immediately terminate this Agreement or any Services provided hereunder.
 - v. Upon termination or expiration of this Agreement ROK shall return all of Client's data to Client, in a non-proprietary and reasonably available format, within five (5) business days of the Agreement's termination. After receiving written confirmation of Client's receipt of such data, ROK shall ensure, and certify to Client, that all of Client's data still in its (or any related entities') possession is destroyed within thirty (30) days of Client's confirmation, unless applicable law prevents destruction of such data.
- C. **Change of Scope.** ROK reserves the right to change the scope and content of any of the Services upon ninety (90) days prior notice to Client. Such changes will become effective upon Client's renewal of the applicable Services.
- D. **Effect of Termination.**
 - i. If, following termination of this Agreement, the Parties execute an SOW, then any such SOW will be governed by the terms and conditions of this Agreement notwithstanding the

earlier termination of this Agreement, unless and until the Parties execute a new MSA to govern the SOW.

- ii. Each of the Services provided hereunder will terminate immediately upon termination of this Agreement, unless otherwise agreed by the Parties. Notwithstanding the foregoing, the Parties' ongoing obligations under any non-terminated SOWs will continue through the end of their defined term, unless otherwise agreed by the Parties in writing.
- iii. Upon termination of this Agreement or any Services, Client shall pay ROK for all work ROK has performed up to the Effective Date of termination at the agreed upon prices, fees and expense reimbursement rates.
- iv. Sections 4(c), 6(e), 6(f), liability under Section 9, and Sections 10 through 16 shall survive termination of this Agreement.

8. BACKUPS; DATA LOSS OR CORRUPTION.

- A. **Tenant Backups.** For Tenants, backups will be performed and retained by ROK according to the schedule set forth in the SLA or other SOW.
- B. **Non-Tenant Backups.** For Non-Tenants, Non-Tenant shall be responsible for performing and retaining current backups of its systems and data. At its exclusive option, ROK shall be entitled to perform and retain its own backups of Client's systems and data according to the schedule set forth in the SLA or other SOW. Client understands and agrees that said backup by ROK is merely intended as a secondary backup and that Client, as the owner of the infrastructure, is expected to make primary backups at a frequency reasonably sufficient to protect Client's data and restore the same, if needed.
- C. **Data Loss or Corruption.** Whether Client is a Tenant or Non-Tenant, ROK is not responsible for any loss, alteration, destruction, damage, or corruption of data resulting from Client's introduction of a virus or other corrupting force (a "**Virus**"). Any warranty or service contract does not cover infection of any Client application or system with such as a Virus. For Non-Tenants, because the Client owns and controls the infrastructure of its systems, any virus not expressly introduced by ROK shall be deemed a Virus introduced by Client. ROK may, at its discretion, bill Client for the Professional Services required to remove a Virus and restore the system.
- D. **D. Security; Data.** See attached Exhibit A, which is attached and incorporated herein by reference.

Int.  

9. CLIENT RESPONSIBILITIES AND RESTRICTIONS.

- A. **Tenant responsibilities.** As a Tenant, Client shall be solely responsible for:
 - i. Confidentially maintaining an accurate and complete list of all individuals that are authorized by Client to have access credentials ("**Authorized Users**");
 - ii. The security and use of access credentials by the Authorized Users;
 - iii. The use of the Services by the Authorized Users in compliance with Client's responsibilities and restrictions under this Agreement;
 - iv. Employing all physical, administrative, and technical controls, screening, security procedures, and other safeguards necessary to securely administer the distribution and use of all access credentials and protect against any unauthorized access to or use of the Services and control of data, including the uploading or other provision of data for processing by the Services;
 - v. The content of the data provided to ROK or otherwise hosted by ROK for the Client under this Agreement, including without limitation ensuring that all such content is benign and suitable for hosting in a public cloud environment;
 - vi. Securing and maintaining all rights in the data provided to ROK or otherwise hosted by ROK for the Client necessary for ROK to provide Services without violating the rights of any third party or otherwise obligating ROK to Client or to any third party;
 - vii. Use of the Services in a manner that infringes, misappropriates, or otherwise violates any intellectual property right, privacy right, or other right of any third party including by any unauthorized access to, misappropriation, use, alteration, destruction, or disclosure of the data of any third party, or that violates any applicable law;
 - viii. Client's information technology infrastructure, including computers, software, databases, electronic systems (including database management systems), and networks, whether operated directly by Client

- or through third-Party services;
 - ix. All access to and use of the Services directly or indirectly with or without Client's knowledge or consent, including all results obtained from, and all conclusions, decisions, and actions based on, such access or use; and
 - x. Providing all cooperation and assistance as ROK may reasonably request to enable ROK to exercise its rights and perform its obligations under and in connection with this Agreement.
- B. Tenant restrictions.** As a Tenant, Client shall not, and shall not permit others to:
- i. Copy, modify, or create derivative works or improvements of the Services;
 - ii. Rent, lease, lend, sell, sublicense, assign, distribute, publish, transfer, or otherwise make available any Services to any third-Party without first obtaining approval from ROK, including on or in connection with the internet or any time-sharing, service bureau, software as a service, cloud, or other technology or service;
 - iii. Reverse engineer, disassemble, decompile, decode, adapt, or otherwise attempt to derive or gain access to the source code of the Services, in whole or in part;
 - iv. Bypass or breach any security device or protection used by the Services or access or use the Services other than by an authorized user through the use of his or her own then valid access credentials;
 - v. Input, upload, transmit, or otherwise provide to or through the Services, any information or materials that are unlawful or injurious, or contain, transmit, or activate any harmful code;
 - vi. Damage, destroy, disrupt, disable, impair, interfere with, or otherwise impede or harm in any manner the Services, ROK systems, or ROK's provision of Services to any third Party, in whole or in part;
 - vii. Remove, delete, alter, or obscure any trademarks, specifications, documentation, warranties, or disclaimers, or any copyright, trademark, patent, or other intellectual property or proprietary rights notices from any Services, including any copy thereof;
 - viii. Access or use the Services in any manner or for any purpose that infringes, misappropriates, or otherwise violates any intellectual property right or other right of any third Party including by any unauthorized access to, misappropriation, use, alteration, destruction, or disclosure of the data of any third-Party, or that violates any applicable law;
 - ix. Access or use the Services for purposes of competitive analysis of the Services, the development, provision, or use of a competing service or product or any other purpose that is to ROK's detriment or commercial disadvantage; or
 - x. Access or use the Services in, or in association with, the design, construction, maintenance, or operation of any hazardous environments, systems, or applications, any safety response systems or other safety-critical applications, or any other use or application in which the use or failure of the Services could lead to personal injury or severe physical or property damage.
- C. Tenant Responsibility for Certain Factors Affecting Uptime.** The service commitment and hourly or uptime commitment in any Service Level Agreement do not apply to any unavailability, suspension or termination of an included Service, or any other included Service performance issues: (i) caused by factors outside of ROK's reasonable control, including any force majeure event or internet access or related problems beyond the demarcation point of the applicable included Service; (ii) that result from any actions or inactions of Client or any third party, including failure to acknowledge a recovery volume; (iii) that result from Client's equipment, software or other technology and/or third party equipment obtained by Client, software or other technology (other than third-party equipment within ROK's direct control); (iv) that result from Client or third-party (including AWS) policies or protocols inherited by ROK; (v) relating to compliance with laws applicable to Client or Client's industry that are not generally applicable to information technology service providers; or (vi) arising from ROK's suspension or termination of Client's right to use the applicable included Service in accordance with the Agreement. If availability is impacted by factors other than those listed herein or used in ROK's monthly uptime percentage calculation, then ROK may issue a service credit to Client at its exclusive discretion.
- D. Non-Tenant responsibilities.** As a Non-Tenant, Client shall be solely responsible for:
- i. Confidentially maintaining an accurate and complete list of Authorized Users;
 - ii. The security and use of access credentials by the Authorized Users;
 - iii. The use of the Services by the Authorized Users in compliance with Client's responsibilities and

restrictions under this Agreement;

- iv. Employing all physical, administrative, and technical controls, screening, and security procedures and other safeguards necessary to securely administer the distribution and use of all access credentials and protect against any unauthorized access to or use of the Services and control the content and use of Client data, including the uploading or other provision of data for processing by the Services;
 - v. The content of data associated with or effected by Services provided by ROK, including without limitation ensuring that all such content is benign and suitable for hosting in a public cloud environment;
 - vi. Security, protection, and backup of data associated with or effected by Services provided by ROK; and
 - vii. Compliance with laws applicable to the use of data associated with or effected by Services provided by ROK;
 - viii. Use of Services in a manner that infringes, misappropriates, or otherwise violates any intellectual property right, privacy right, or other right of any third Party including by any unauthorized access to, misappropriation, use, alteration, destruction, or disclosure of the data of any third-Party, or that violates any applicable law;
 - ix. Set up, maintenance, and operation all Client systems in good repair on or through which the Services are accessed or used;
 - x. Providing ROK with such access to Client's premises and Client systems as is reasonably necessary for ROK to perform the Services;
 - xi. Client's information technology infrastructure, including computers, software, databases, electronic systems (including database management systems), and networks, whether operated directly by Client or through the use of third-Party services;
 - xii. All access to and use of the Services directly or indirectly with or without Client's knowledge or consent, including all results obtained from, and all conclusions, decisions, and actions based on, such access or use; and
 - xiii. Providing all cooperation and assistance as ROK may reasonably request to enable ROK to exercise its rights and perform its obligations under and in connection with this Agreement.
- E. **Non-Tenant Restrictions** - as a Non-Tenant, Client shall not, and shall not permit others to:
- i. Copy, modify, or create derivative works or improvements of the Services;
 - ii. Reverse engineer, disassemble, decompile, decode, adapt, or otherwise attempt to derive or gain access to the source code of the Services, in whole or in part;
 - iii. Damage, destroy, disrupt, disable, impair, interfere with, or otherwise impede or harm in any manner the Services or ROK's provision of Services;
 - iv. Remove, delete, alter, or obscure any trademarks, specifications, documentation, warranties, or disclaimers, or any copyright, trademark, patent, or other intellectual property or proprietary rights notices from any Services, including any copy thereof;
 - v. Access or use the Services in any manner or for any purpose that infringes, misappropriates, or otherwise violates any intellectual property right or other right of any third Party including by any unauthorized access to, misappropriation, use, alteration, destruction, or disclosure of the data of any third-Party, or that violates any applicable law;
 - vi. Access or use the Services for purposes of competitive analysis of the Services, the development, provision, or use of a competing service or product or any other purpose that is to ROK's detriment or commercial disadvantage; or
 - vii. Access or use the Services in, or in association with, the design, construction, maintenance, or operation of any hazardous environments, systems, or applications, any safety response systems or other safety-critical applications, or any other use or application in which the use or failure of the Services could lead to personal injury or severe physical or property damage.
- F. **All Clients.** Except to the extent caused by ROK's breach of this Agreement, Client is responsible for all activities that occur on Client's Platform or under all Client accounts, regardless of whether the activities are authorized by Client or undertaken by Client, Client's employees or a third party (including Client's contractors, agents or end users), and ROK is not responsible for unauthorized access to Client accounts.

10. WARRANTY; DISCLAIMER AND LIMITATIONS.

- A. **Services Warranty.** With respect to Services performed by ROK, ROK warrants to Client, unless otherwise specified in writing, that the Services as and when delivered or rendered, will conform to the standard of care exhibited by reasonably skilled contractors in the industry (network systems integration). Client shall notify ROK in writing within ninety (90) days after provision of the Services in question if any of the Services fail to conform to the standard of care set forth in this Agreement. The passage of the thirty (30) day period after provision of the Services without the notification described herein shall constitute Client's final acceptance of the Services.
 - B. **Third-Party Product Warranties.** With respect to particular products manufactured or supplied by third parties to ROK for resale to Client, ROK MAKES NO WARRANTIES OF ANY KIND IN ADDITION TO OR EXCEEDING THE WARRANTY SUPPLIED OR OFFERED BY THE RESPECTIVE MANUFACTURER OR SUPPLIER, which shall be transferred or assigned to Client, if possible, and Client's recovery is limited to recovery against such manufacturer or supplier for breach of any applicable warranties of manufacturer or supplier. In the event of a claim by Client for breach of product warranty, ROK must follow the warranty policy established by the manufacturer. This policy may require return of the warranted item to the manufacturer for repair. At Client's request, ROK agrees to take all actions reasonably necessary or appropriate to secure Client's rights and to protect its interests under such third-party warranties. Work performed by ROK, not covered by product warranty, will be billed to Client at the applicable ROK rate.
 - C. **Disclaimer.** EXCEPT AS EXPRESSLY PROVIDED HEREIN OR IN ANY SOW, THE SERVICES ARE PROVIDED ON AN "AS IS" BASIS. USE AND RELIANCE ON THE SERVICES ARE AT CLIENT'S OWN RISK. EXCEPT AS EXPRESSLY PROVIDED HEREIN OR IN ANY SOW, ROK EXPRESSLY DISCLAIMS ANY EXPRESS OR IMPLIED WARRANTY RELATING TO THE SERVICES, INCLUDING BUT NOT LIMITED TO THE IMPLIED WARRANTIES OF MERCHANTABILITY, MERCHANTABLE OR SATISFACTORY QUALITY, FITNESS FOR A PARTICULAR PURPOSE, OR ARISING FROM COURSE OF PERFORMANCE, COURSE OF DEALING, OR USAGE OF TRADE. EXCEPT AS EXPRESSLY PROVIDED HEREIN OR IN ANY SOW, ROK EXPRESSLY DISCLAIMS ANY THAT USE OF OR ACCESS TO THE SERVICES WILL BE CONTINUOUS, UNINTERRUPTED, ERROR-FREE, FREE OF DEFECTS, OR FREE OF TECHNICAL PROBLEMS.
- 11. NON-SOLICITATION.** During the term of this Agreement and for a period of one (1) year following the end of this Agreement, neither Party will (i) offer employment to any employee of the other Party; or (ii) attempt to directly or indirectly induce any employee of the other Party to terminate his or her employment. In the event of a breach of this section, money or damages may not be an adequate remedy, and, therefore, in addition to any other legal or equitable remedies, each Party shall be entitled to seek an injunction against such breach. The obligations set forth in this section are independent covenants and shall survive termination of this Agreement. Notwithstanding the foregoing, each Party shall be free to offer employment to any employee or subcontractor that directly contacts such Party in response to general public advertisements of employment opportunities (including the use of employment agencies and recruiters).
- 12. DISPUTE RESOLUTION.**
- A. **Governing Law.** This Agreement, including without limitation this Agreement's interpretation, shall be treated as though this Agreement were executed and performed in the State of North Carolina, and shall be governed by and construed in accordance with the laws of the State of North Carolina without regard to its conflict of law principles. The language in this Agreement shall be interpreted in accordance with its fair meaning and not strictly for or against either Party.
 - B. **Venue.** The proper and exclusive venue for any judicial action between the Parties—including any remedies in aid of arbitration, such as a petition to compel arbitration or confirm an arbitration award—shall be the state and federal courts located in or nearest to Monroe, North Carolina
 - C. **Legal Fees.** If any dispute arises between the Parties with respect to the matters covered by this Agreement which leads to a proceeding to resolve such dispute, the prevailing Party in such proceeding shall be entitled to receive its reasonable attorneys' fees, expert witness fees, litigation costs (including arbitration fees and court fees), and any other relief it may be awarded, as permitted by NC law.
- 13. CONFIDENTIALITY.**
- A. **Confidential Information.** "Confidential Information" shall mean and include all of the proprietary, non-public information of either Party disclosed pursuant to or in furtherance of this Agreement including but not limited to all Technical Information as defined herein, and any information relating

to markets, customers, products, patents, inventions, procedures, methods, designs, object code, data, programs, improvements, training materials, workflows, and works of authorship. Notwithstanding the foregoing, "Confidential Information" shall not include any information, that the recipient can demonstrate through its records (i) was in its knowledge or possession prior to disclosure by the discloser, (ii) was in the public domain at the time of disclosure or subsequently entered the public domain through no fault of recipient, or (iii) was disclosed to recipient by a third party with the right to make such a disclosure or (iv) meet the definition of a "public record" as defined by North Carolina law.

- B. **Duty of Nondisclosure.** It is expected that, appurtenant to this Agreement, each Party to this may disclose certain Confidential Information to the other Party. Each Party shall refrain from using or exploiting any Confidential Information of the other Party for any purposes or activities other than those specifically authorized in this Agreement. Each Party represents and warrants that it will hold Confidential Information in confidence and protect Confidential Information to the same extent and by the same means it uses to protect the confidentiality of its own proprietary or confidential information that it does not wish to disclose. Neither Party shall disclose or facilitate disclosure of Confidential Information of the other Party to anyone except its employees, independent contractors, or legal or tax advisors who are authorized according to this Agreement and who have a "need to know such information", or as otherwise required by law. Each Party shall ensure that the employees, independent contractors, or legal or tax advisors to whom the Confidential Information is disclosed comply with their obligations under this Agreement with respect to the Confidential Information.
- C. **Survival.** Each Party's duty of confidentiality with respect to all Confidential Information it receives hereunder will survive termination or expiration of this Agreement and will be binding upon each Party's successors and assigns. Upon termination or expiration of this Agreement, all Confidential Information made available hereunder, including copies thereof, shall be returned to the disclosing Party or shall be certified as destroyed at the request of the disclosing Party. The Parties may disclose, or may have disclosed, to each other, both orally and in writing or in other tangible form, certain confidential information with respect to each Party's business, as well as the Services provided under this Agreement. The Parties hereby agree to keep such information ~~and the terms of this Agreement~~ confidential.
- D. **Disclosure to Subcontractors.** Notwithstanding any other provision of this Section 19, ROK shall be authorized to disclose Client's Confidential Information to subcontractors, contractors or employees of a ROK entity who have a legitimate business need to have access to such information, only with the express consent of Client. ROK shall be responsible for any breach of this Agreement caused by any of its subcontractors, employees or agents.

Int.  

14. INTELLECTUAL PROPERTY.

- A. **Pre-Existing IP.** Each Party will retain the exclusive ownership of all of its pre-existing intellectual property, Confidential Information and materials, including, without limitation, proprietary ideas, sketches, diagrams, text, know-how, concepts, proofs of concepts, artwork, software, algorithms, methods, processes, identifier codes or other technology that are owned by a Party prior to commencement of any Services hereunder, or that are otherwise developed by or for such Party outside the scope of this Agreement. Client may at any time, access and retrieve all of its data stored in ROK's (or any related entities') infrastructure.
- B. **ROK IP.** Except as otherwise expressly set forth in this Agreement or an applicable SOW, ROK owns and will continue to own all right, title, and interest in and to the Services, products, deliverables, data collection tools, reports, scripts, sketches, diagrams, text, know-how, concepts, proofs of concepts, artwork, software, algorithms, methods, processes, identifier codes or other technology provided or developed by ROK (or a third party acting on ROK's behalf) pursuant to this Agreement, including modifications, enhancements, improvements or derivative works of any of the foregoing, regardless of who first conceives or reduces to practice, and all intellectual property in any of the foregoing (collectively "ROK IP").
- C. **Client IP.** As between Client and ROK, Client at all times retains all right, title and interest in and to all of Client's data and applications provided by Client to ROK hereunder, Client's pre-existing technology and all intellectual property that is developed by Client or by a third party on Client's behalf thereafter, other than ROK intellectual property.
- D. **Third-Party Products.** Third party products will always be owned by the applicable third party and will be subject to any applicable third-Party license terms.

15. GENERAL PROVISIONS.

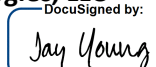
- A. **Entire Understanding.** This Agreement, along with all Exhibits and Appendices incorporated by reference herein, and all SOWs executed by the Parties pursuant to this Agreement, contains the entire understanding of the Parties with respect to the subject matter contained herein, and shall supersede all prior agreements and understandings, whether written or oral. There are no restrictions, promises, covenants, or understandings other than those expressly set forth herein, and no rights or duties on the part of either Party are to be implied or inferred beyond those expressly provided for. To the extent ROK is required to click to agree or accept any written terms of Client in order to provide the Services (e.g., accepting Client's website terms to access Client's designated environment), the Parties understand and agree that such act is the result of a technological requirement and is of no binding effect upon the Parties.
- B. **Severance.** If any provision of this Agreement is held unenforceable or in conflict with the law of any jurisdiction, the validity of the remaining provisions shall not be affected by such holding. The Parties agree to negotiate and amend in good faith such provision in a manner consistent with the intentions of the Parties as expressed in the Agreement, if any invalid or unenforceable provision affects the consideration of either Party.
- C. **Modifications and Additions.** No modifications or additions to the terms and conditions of this Agreement shall be binding unless in writing and signed by both Parties.
- D. **Assignment.** This Agreement shall be binding upon and inure to the benefit of the Parties and their respective successors and assigns. Neither Party may assign the terms or conditions of this Agreement to a third party, affiliated entity, or related division without the prior written consent of the other Party.
- E. **Notices.** All notices provided in connection with this Agreement will be in writing and will be delivered by email and either (i) certified or registered mail, postage prepaid and return receipt requested or (ii) overnight delivery courier (e.g., FedEx) and will be deemed effective upon receipt by the authorized representative at the address set forth above in the preamble, or at such other addresses as the Parties may designate by written notice to each other.
- F. **Force Majeure** – ROK may, without liability, suspend or delay performance of this Agreement on account of force majeure or other circumstances beyond its control, including, but not limited to, strikes, acts of God, political unrest, embargo, failure of source of supply, or casualty.
- G. **Waiver.** No waiver by either Party of any breach of this Agreement, no matter how long continuing or how often repeated, shall be deemed a waiver of any subsequent breach thereof, nor shall any delay or omission on the part of either Party to exercise any right, power, or privilege hereunder be deemed a waiver of such right, power, or privilege.
- H. **Counterparts.** This Agreement may be executed in counterparts, each of which shall be deemed an original, but both of which together shall constitute one and the same instrument.

IN WITNESS WHEREOF, this Agreement is duly executed as of the Effective Date by the following authorized representatives for each Party:

Accepted By:

ROK Technologies, LLC

Signature

DocuSigned by:

49204602FB304B2...

Printed Name

Jay Young

Title

Account Executive

Date

September 20, 2021

[CLIENT]

Signature

DocuSigned by:

A84957CDD7DF479...

Printed Name William M. Watson

Title

County Manager

Date

September 20, 2021

Exhibit A

D. Security; Data. In consideration of this Agreement, ROK warrants that it will employ information security best practices with respect to network security techniques, including, without limitation, firewalls, intrusion detection, and authentication protocols, vulnerability, and patch management. ROK additionally warrants that it will ensure that any data, data security, physical service security, data segregation, continuity of business, and other related operations, plans, protocols, and policies in this Agreement, or any Service Level Agreements are followed. ROK shall ensure that all of Client's data is stored and processed in the United States. ROK shall report to Client any use or disclosure of Client's data which is not authorized by this Agreement, including any reasonable belief that an unauthorized individual has accessed such data. ROK shall report such event without unreasonable delay and in no case later than the following: initially reported by telephone within twenty-four (24) hours of when ROK becomes aware of the event and report thereafter in writing within five (5) days of initial telephone call. As used in this paragraph, the phrase "becomes aware" shall mean the first day on which unauthorized use or disclosure of Client's data is known or reasonable should have been known by ROK to have occurred. ROK shall provide Client all such information related to such unauthorized use of access of Client's data, including a written report, as is reasonably requested by Client.



County of Union, NC

AMAZON WEB SERVICES
(AWS), GIS Managed Services
Agreement

Service Level Agreement 2020-2021

1 Introduction

Businesses today are faced with the growing challenge of supporting end-user access to complex applications from a variety of locations, devices, and methods. Coupled with the fact that all organizations today require "Enterprise-Class" computing functionality, internal IT resources are pushed to their limits, often struggling to meet the service levels demanded by the business.

To help County of Union, NC ("**Client**") address these diverse needs, ROK Technologies ("**ROK**") provides GIS Managed Services that offer a flexible suite of extended maintenance and premium support offerings designed to:

- Proactively reduce the risks of costly downtime
- Ease resource and skillset constraints
- Simplify management
- Optimize system performance
- Improve productivity, security, compliance, and return on investment

This Managed Services Agreement or "**SLA**" will provide Client with access to trained and certified experts that can help thoroughly resolve pressing issues in a timely fashion and, thereby, aid Client in achieving its business objectives. In this manner, Client gains the benefit of a single point of accountability.

With fixed cost and flexible options for GIS Managed Services, ROK Technologies provides consistency and ensures Client is receiving the optimal benefit from its investments. ROK Technologies is honored to partner with Client and is committed to helping Client maintain the health and efficiency of its valuable IT resources.

2 Reactive Support

Reactive Support provides the services necessary to respond to and resolve support incidents reported by Client as they arise. ROK's goal is to quickly resolve incidents before they significantly affect business continuity. Typical incidents include, but are not limited to, the following:

- A system down condition in which system operation is disrupted or severely hampered
- Poor system performance that is impeding system and application operation
- Loss of connectivity to internal networks or Internet services
- An inability to access data residing on an external storage device

The scope and terms of ROK's Reactive Support services are described below in the following sections.

2.1 Scope of Service

The scope of ROK's Reactive Support services includes the tracking and management of customer-reported incidents, diagnosis and remediation of reported incidents, and assistance with system changes to the AMAZON WEB SERVICES (AWS) environment and the installed Esri Commercial off-the-shelf software ("**Esri COTS**"). The specific tasks associated with these activities are as follows:

2.1.1 Incident Tracking

1. Receive and respond to incidents reported by the Client in accordance with the service levels defined later in this document.
2. Record and track each incident in ROK's ticket management system.
3. Periodically report the current status of the incident to designated Client personnel.
4. Communicate the steps taken to ultimately resolve the incident.

2.1.2 Problem Diagnosis and Remediation

1. Collect information from Client regarding the nature of the incident, the circumstances under which the incident occurred, and its current and potential impact.
2. Investigate potential causes of the incident and diagnose the root cause where possible, drawing upon currently installed diagnostic tools as required.
3. Identify potential remedies for the incident based on the results of problem diagnosis.
4. Apply and test possible fixes in a systematic fashion until the incident is resolved or otherwise closed.
5. Engage vendor support as required to assist in troubleshooting and resolution and continue to manage the incident through to completion.

2.1.3 Configuration Assistance

1. Collect information from Client regarding the scope of the change requested, the motivation for the change, and the expected results.
2. Investigate the potential impact of the change, in terms of desired results and unintended consequences.
3. Determine the steps necessary to implement the change while mitigating risk.
4. Recommend a course of action to Client.
5. Upon authorization by Client, implement changes in accordance with the plan of action.
6. Record the change in accordance with Client's change management processes.

2.1.4 Esri COTS Application Upgrades and Patches

1. Upon request, ROK's Managed Services Team will upgrade and configure Esri COTS to the desired version. Additionally, upon request, ROK's Managed Services will install critical and optional patches as they are released.
 - a. ROK will communicate critical upgrade and patching opportunities for Esri COTS. If desired, both parties will work to schedule a day and time to complete the upgrade and/or patching that limits disruption of service.
2. Upon request, ROK's Managed Services will install and configure new Esri COTS as desired by Client. Managed Services hours will be consumed for this effort.

2.1.5 Customer Support

Customer Support: Tickets can be submitted 24hrs a day, 7 days a week via the **Client** portal which will be provided after execution of contract. Support tickets can also be called in 24hrs a day, 7 days a week via the toll-free number which will be provided after execution of contract.

2.1.6 Third Party Integrations

One of the benefits of having a managed service provider is that you'll always have a cloud-GIS expert on your side. This can be particularly beneficial when it comes to the complexities of integrating your GIS system with other third-party products. ROK's role in assisting you with these integrations includes the following:

- Addressing any IT considerations in relation to ArcGIS or your cloud environment (opening ports, configuring certificates, users, etc.)
- Providing reasonable third-party access as requested and defined by our customers

- Configuring the ArcGIS platform to be ready for integrations, as specified by the selected third party

3 Proactive Support

Proactive Support includes the administrative services necessary to maintain the supported equipment in working condition and protect the data stored thereon. The primary goal of ROK's Proactive Support is to reduce the risk of system failure and to mitigate the impact of unplanned outages should they arise. ROK Technologies shall render these services continuously over the life of the engagement, with most tasks occurring on a periodic basis with predetermined frequency. The scope, deliverables, and terms of ROK's Proactive Support services are described below in the following sections.

3.1 Scope of Service

The scope of ROK's Proactive Support and specific tasks associated with these activities are as follows:

3.1.1 *Dedicated Client Success Manager*

ROK's primary goal is to provide Client with flawless service, becoming an extension of Client's technical team of experts. Serving as Client's single point of contact, ROK Technologies assigned Client Success Manager's primary responsibilities shall include:

- Understanding Client's business needs
- Managing Client's ROK Technologies entitlements
- Accelerating the delivery of ROK's Technical Services
- Quarterly business review (QBR)

3.1.2 *Proactive Support Services*

ROK Technologies will provide resources skilled in the planned activities on the given month to come to help accomplish the objectives outlined during the planning session. Client and ROK Technologies realize these objectives will vary and change from month-to-month based on the current business needs and objectives. The ROK Technologies CSM will work with Client prior to resource scheduling to ensure proper skillset alignment to the current need. Note: Scheduling is subject to resource availability.

- **OS Updates and Patches** | ROK's Managed Services takes care of all your OS patching activities to help keep your resources current and secure. When updates or patches are released from your OS vendors our team applies them in a timely and consistent manner to minimize the impact on your business. Critical security patches are applied as needed, while others are applied based on the patch schedule you request.
- **Incident Management** | ROK Managed Services monitors the overall health of your infrastructure resources and handles the daily activities of investigating and resolving alarms or incidents. Committed to a 2-hour maximum response time, in the event of an instance failure, our team would take appropriate action to help minimize or avoid service interruption.
- **Back Up and Retention** | **BACKUP FREQUENCY:**

Back Up and Retention Duration		
Frequency	Time	Retention Duration
Daily	Every 12 hours	2 Weeks
Monthly	1 st Full VM Snapshot of the Month	12 Months
SQL Server		
Frequency	Time	Retention Duration
Daily	4 times daily	2 Weeks
Monthly	1 st Full SQL Backup of the Month	12 Months

- **Security Management** | ROK protects your information assets to help keep your Cloud infrastructure secure. With anti-malware protection, intrusion detection, and intrusion prevention systems, ROK's Team manages security policies per stack, and can quickly recognize and respond to any intrusion.

3.1.2.2 Customer Support

1. **Customer Support.** Tickets can be called in 24 hours a day, 7 days a week via the toll-free number which will be provided after execution of contract. Tickets may also be submitted any time via email or from the Customer Service Portal. Contact emails and Customer Service Portal information will be provided following execution of contract.
2. **Coverage Hours.** Live Support is available 8am to 5pm EST M-F ("**Support Hours**").
 - a. **Customer Service Portal ("**Portal**"):** ROK will provide to Client unlimited access to Portal support. Client will report Malfunctions by accessing the Portal and creating a service ticket or by sending an email to a dedicated support email address. A member of ROK's Support Staff ("**Support Staff**") will be assigned and Client will be contacted within in a timeframe defined by the severity of the Malfunction. If the Support Staff member handling a request is unable to provide adequate assistance to Client for such requests hereunder, ROK will supply one or more alternative Support Staff members who are able to respond to the request to Client's reasonable satisfaction. All support ticket activities, findings, and resolutions will be tracked in the customer portal for future reference.
 - b. **Telephone Support Service:** ROK will provide to Client unlimited access to 24/7 Telephone Support ("**Telephone Support**") via a toll-free number. Client will report Malfunctions by calling the Telephone Support number. A member of the Support Staff will be assigned to the Malfunction, and Client will be contacted within the timeframe defined by the severity of the Malfunction. In the event a Malfunction is reported outside of Support Hours, the on-duty Support Staff will be assigned and will contact Client within sixty (60) minutes of the original call. If the Support Staff member handling a certain request is unable to provide adequate assistance to Client for such requests hereunder, ROK will supply one or more alternative Support Staff members who are able to respond to the request to Client's reasonable satisfaction.
3. **Severity of Malfunctions.** ROK will correct Malfunctions as provided herein. "**Malfunction**" shall mean a failure by the Services to operate as required by this Agreement. "Services" shall refer to the Amazon Web Services (AWS) environment and/or the Esri Certified Off the Shelf software (COTS). The definitions of the Malfunction Severity classifications are as follows:
 - a. **Severity Level 1:** A problem which renders the Services inoperative, causes a significant and ongoing interruption to the end-user's business activities or causes a loss or corruption of data,

where either the entire company or large groups of users are affected.

b. Severity Level 2: A problem which causes the Services to be intermittently inoperative, disrupted or malfunctioning and which materially interferes with Client's use of the Services, for the entire company or large groups of users.

c. Severity Level 3: A problem which causes the Services not to function in accordance with applicable specifications, for small groups or individual users, but which causes only a minor impact on Client's use of the Services and for which an acceptable circumvention is available.

d. Severity Level 4: Any general questions and issues pertaining to the Services and all Malfunctions which are not included in the other Malfunction classifications.

4. *Correction of Malfunctions.* ROK will correct Malfunctions as provided herein. "Malfunction" shall mean a failure by the Services to operate as required by this Agreement. "Services" shall refer to the Amazon Web Services (AWS) environment and/or the Esri Certified Off the Shelf software (COTS). The definitions of the Malfunction classifications are as follows:

a. Report of Malfunction. With respect to a report of any Malfunction, Client personnel making such a report will describe to the Support staff the Malfunction in reasonable detail and the circumstances under which the Malfunction occurred or is occurring and will, based upon the criteria of the Severity Definition, classify the Malfunction as a Severity Level 1, 2, 3 or 4.

b. Critical Malfunctions. If a Severity Level 1 or 2 Malfunction (each, a "Critical Malfunction") cannot be corrected to Client's reasonable satisfaction through communication with the Support staff within two (2) hours after ROK receives the description of the Malfunction, ROK will: (1) escalate the problem to additional members of Support Staff and ROK's Client Success Manager; (2) take and continue to take the actions which will most expeditiously resolve the Critical Malfunction; (3) provide a report to Client of the steps taken and to be taken to resolve the problem, the progress to correction, and the estimated time of correction, and update that report every two (2) hours until the Critical Malfunction is resolved.

c. ROK's Level of Effort. ROK will work continuously until any Critical Malfunction, of which a correction or workaround has not been achieved, has been resolved. Additionally, if a correction or workaround to a Critical Malfunction has not been achieved within two (2) days ROK will work continuously, during normal ROK working hours, try to resolve any Severity Level 1 or 2 Malfunction. ROK and Client will mutually agree upon a schedule within which to resolve any Severity Level 3 or 4 Malfunction.

d. Action Required from ROK. For a Critical Malfunctions, ROK will work to provide an immediate correction, which will then be promptly implemented for the Client staff to test. For a Severity Level 3 or 4 Malfunction, ROK will provide a correction as promptly as reasonably achievable, and will seek to establish with Client a mutually agreed schedule for the correction to be provided.

Service/Activity	Service Level	Service Level Credit
Availability of the Services	Failure to comply with the Customer Support requirements outlined in section 3.1.2.2	10% of the monthly charge for the month of the failure.
Restore Time	In the event of unscheduled downtime caused by ROK Technologies, the system shall be restored and fully operational within four (4) hours. If the event is caused by an employee of Client, ROK will work to restore the environment within the 4-hour window and will communicate the action plan and updates to Client throughout the restoration. No penalty to ROK will be applied if downtime is caused by an employee of Client or Client Configurations, as defined in Section 8 below.	Should the action caused by ROK and lead to downtime in excess of 4 hours, Client shall receive credit for 10% of the monthly charge for the month of the failure.

4 Assumptions

ROK's delivery of the services defined by this Agreement is based on the assumptions described below. Any deviation from these assumptions might impact the scope of services to be provided and associated fees:

1. ROK Technologies shall primarily render Reactive Support services remotely, while making use of current technologies that provide remote access and control of the supported systems where available.
2. Client shall permit the use of remote access technologies that enable ROK Technologies to render services remotely.

5 Managed Services Billing Information

The Managed Services hereunder are billed on an annual basis. The billing amount for this SLA shall be based on the services described in the table below.

Item(s)	Term	Cost Per Month / Pay as you go
<u>AWS Infrastructure and ROK's Managed Cloud Services:</u> ArcGIS Server 8 vCPU 32 GB RAM ArcGIS Server 4 vCPU 16 GB RAM ArcGIS Server 4 vCPU 16 GB RAM- DEV Citrix Seats Citrix Server 8 vCPU 32 GB RAM DataStore Server 4 vCPU 16 GB RAM DataStore Server 4 vCPU 16 GB RAM- DEV FileServer/LM/CCC 2 vCPU 8 GB RAM Geoevent Server 4 vCPU 16 GB RAM GeoEvent Server 4 vCPU 16 GB RAM-DEV Other 4 vCPU 16 GB RAM Other 4 vCPU 16 GB RAM Other 4 vCPU 16 GB RAM-DEV Portal Server 4 vCPU 16 GB RAM Portal Server 4 vCPU 16 GB RAM-DEV 22 Hours of Managed Services per month S3 1TB SQL 8 vCPU 32 GB RAM SQL 4 vCPU 16 GB RAM-DEV SQL 4 vCPU 16 GB RAM Storage/SnapShot SSD 100GB 250GB Storage/SnapShot SSD 100GB 250GB-Dev	12 months	\$12,434.45

WebServer 2 vCPU 8 GB RAM WebServer 2 vCPU 8 GB RAM WebServer 2 vCPU 4 GB RAM-DEV		
Annual total		\$149,213.00

Pricing based solely on the Cloud environment outlined in Section 11. Infrastructure needs will be reviewed ongoing. Should Client require a change in resources that differ from those listed, ROK Technologies, will work with Client to determine the hardware changes needed, and the associated costs/savings. All changes will be accepted in writing via signed amendment before being executed. Payments are due 30 days from receipt of invoice non-payment after 60 days will result in suspension of service.

September 20, 2021

The initial term of this SLA shall begin on **9/15/2020** and expire one year thereafter. Upon expiration, this SLA may renew for additional terms up to three years in duration upon the execution of an amendment to this Agreement signed by both parties. Termination of this SLA shall be governed by Section 7 of the MSA.

5.1 Billing Terms

The following terms shall govern the determination of fees associated with this Agreement:

1. Terms of payment are due thirty days from the receipt of an accurate invoice. Late fees will be applied on invoices greater than sixty (60) days from the date invoiced and can result in suspension of service.

6 Scheduling

As part of these offerings, ROK Technologies will conduct proactive scheduling with Client. As scheduling changes arise, Client shall contact ROK Technologies one (1) to two (2) weeks in advance where possible. The ROK Technologies Technical Operations Team will make a best effort to accommodate special requests.

7 Change Control Policy

As ROK Technologies and Client collaborate on this Managed Services Agreement, it is possible that either party will find reasons to change the scope of this Agreement. In the event that Client would like to discuss the addition or subtraction of specified, agreed upon services, Client will submit a Service Request to ROK. Client's ROK Technologies Account Manager will make contact within one (1) business day to review or schedule a review of this request.

8 Disclaimers

In addition to the disclaimers and limitations set forth in the MSA, Client understands and agrees as follows with respect to the Managed Services rendered hereunder:

ROK is not responsible for the loss of data caused by the action(s) of Client. Any warranty or service contract does not cover infection of any system with a virus introduced by Client. All work necessary for ROK to remove a virus will be billed to Client. Work performed under a service contract is governed by the terms of said service contract.

The uptime, support requirements, response times, and Service Level Credits set forth in this SLA shall not be binding upon ROK for any occurrence, failure of service, or other malfunction caused by any factor set forth in Section 9(c) of the MSA, Client, any employee, vendor or other agent of Client, or any system configuration under Client's exclusive control (for example, where applicable, external VPN, external authentication, external

access management, external environment peering, or Client’s specialized non-standard system software) (collectively, “**Client Configurations**”). ROK disclaims all responsibility for Client Configurations and Client assumes sole liability for any problem or error caused by the same.

9 Supported Environment

Infrastructure needs will be reviewed ongoing. Should Client require additional resources beyond those listed, ROK Technologies will work with Client to determine the additional hardware needed and the associated costs.

Description	Qty. Per Month	Specs
ArcGIS Server Federated	1	8vCPUs 32GB RAM
ArcGIS Hosting	1	4vCPUs 16GBRAM
Geoevent	1	4vCPUs 16GBRAM
Portal Server	1	4vCPUs 16GBRAM
Datastore	1	4vCPUs 16GBRAM
S-T Datastore	1	4vCPUs 16GBRAM
SQL Server	1	8vCPUs 32GB RAM
Web Adaptor	1	2vCPUs 8GBRAM
Web Server	1	2 vCPUs 4GB RAM
ArcGIS/ Image Server (County’s Server)	1	4 vCPUs 16GBRAM
Utilities/LM/Citrix Cloud Connector	1	2 vCPUs 8GBRAM
ArcGIS Server Federated Development	1	4vCPUs 16GB RAM
ArcGIS Hosting Development	1	4vCPUs 16GBRAM
Geoevent Development	1	4vCPUs 16GBRAM
Portal Server Development	1	4vCPUs 16GBRAM
Datastore Development	1	4vCPUs 16GBRAM
S-T Datastore Development	1	4vCPUs 16GBRAM
SQL Server Development	1	4vCPUs 16GB RAM
Web Adaptor/Server Development	1	2vCPUs 8GBRAM
S3 Storage	3 TB	
Citrix Server	1	8vCPUs 32GB RAM
Citrix Seats	6	
ROK’s Managed Services	22 hours	

10 Service Level Agreement Support Matrix

SLA Response Time Definition				
	1st response	2nd response	follow/update	final
1 - Critical	< 1 hour	< 2 hrs from 1st response	every 2 hrs until closed	closed
2 - High	< 1 hour	< 2 hrs from 1st response	< 2 hrs from 2nd response*	closed
3 - Medium	≤ 4 hours	≤ 8 hours	as needed*	≤16 hours closed
4 - Low	≤ 8 hours	as needed*	questions/feedback	≤16 hours closed
Hours are defined by normal 8-5 day			*a solution and time line will be agreed upon with the County of Union, NC Public Works	

SLA Severity Definition				
Severity - Affected users	Business impact			
	<i>High -problems that render services inoperative, causes significant interruption, or data loss</i>	<i>Medium - causes services to be intermittent or disrupted, which interferes with business</i>	<i>Low- causes the services not to function in accordance specs, with only minor impact</i>	<i>None - general questions and issues, and other lesser malfunctions</i>
High Severity - whole company is affected	1 - Critical	2 - High	3 - Medium	3 - Medium
Medium Severity - departments or large group of users affected	1 - Critical	2 - High	Level 4 - Low	4 - Low
Low Severity - one or a small group is affected	2 - High	3 - Medium	4 - Low	4 - Low

11 Acceptance & Integration with MSA

This Service Level Agreement constitutes the full agreement between ROK and Client for the Managed Services described herein. The attached "Exhibit A" is hereby incorporated by reference into this Agreement.

Upon execution by the Parties, this Service Level Agreement or "SLA" shall become a Statement of Work, or "SOW" issued under, integrated with, and governed by the Master Services Agreement between the Parties. Capitalized terms not defined in this Service Level Agreement shall have the meaning ascribed to them in the MSA.

The undersigned parties acknowledge their acceptance of this SLA and the terms and conditions described herein. Furthermore, the undersigned parties certify that they are authorized representatives of their respective companies with full authority to sign this SLA and enter into this Agreement on behalf of their respective organizations.

Services	Price
GIS Managed Cloud Services <i>includes all managed services outlined, AMAZON WEB SERVICES (AWS) hardware, and VDI</i>	\$12,434.45.00 per month
Annual Cost of Service	\$149,213.4

Contract Terms: 12

Payment Option: Annually x

Agreed to and Accepted By:

ROK Technologies, LLC

DocuSigned by:
Signature Jay Young
49204002FB50482...
Printed Name Alexandra Coleman Jay Young

Title CEO
Date September 20, 2021

For **[INSERT CLIENT NAME]**

DocuSigned by:
Signature William M Watson
A84957CDD7DF479...
Printed Name William M. Watson

Title County Manager
Date September 20, 2021

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

DocuSigned by:
Elm Cukro
ADE45A3BB91A45E...
Deputy Finance Officer

Approved as to Legal Form: KLC

Exhibit A

- I. At ROK Technologies sole expense, ROK Technologies 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. NETWORK SECURITY & PRIVACY LIABILITY (CYBER)

\$1,000,000 Claims Made
\$3,000,000 Aggregate Limit

ROK Technologies 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. Before commencement of any work or event, ROK Technologies shall provide a Certificate of Insurance in satisfactory form as evidence of the insurances required above.
- B. ROK Technologies shall have no right of recovery or subrogation against Union County (including its officers, agents and employees).
- C. It is the intention of the parties that the insurance policies afforded by ROK Technologies shall protect both parties and be primary and non-contributory coverage for any and all losses covered by the above-described insurance.
- D. Union County shall have no liability with respect to ROK Technologies' personal property whether insured or not insured. Any deductible or self-insured retention is the sole responsibility of ROK Technologies.
- E. Notwithstanding the notification requirements of the Insurer, ROK Technologies hereby agrees to notify County's Risk Manager at 500 N. Main Street, Suite #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.
- F. The Certificate of Insurance should note in the Description of Operations the following:

Department: Information Technology
Contract #: 7247

- G. Insurance procured by ROK Technologies shall not reduce nor limit ROK Technologies 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.

- H. Certificate Holder shall be listed as follows:

Union County
Attention: Keith A. Richards, Risk Manager

500 N. Main Street, Suite #130
Monroe, NC 28112

- I. If ROK Technologies is authorized to assign or subcontract any of its rights or duties hereunder and in fact does so, ROK Technologies 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. Indemnification. ROK Technologies 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 ROK Technologies, its officers, employees, subcontractors or agents. ROK Technologies 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. 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. ROK Technologies shall ensure that ROK Technologies 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 ROK Technologies will be considered a breach of this Agreement, which entitles Union County to terminate this Agreement, without penalty, upon notice to ROK Technologies.

~~County of Union, NC Public Works~~ Union County, NC ("Client")

Int  

AWS, Tenant SLA

Service Level Agreement
Dec 01, 2022 - Nov 30, 2023

October 11, 2022



1501 Belle Isle Avenue,
Suite 110 PMB1047,
Mount Pleasant SC 29464
info@roktech.net

Managed Infrastructure

Name	Server Name	Qty	ENV	Uptime %	OS Storage (GB)	Data Storage (GB)	Server Size
Citrix Seat		12					
AWS - S3 Bucket - 1TB		3					
AWS - ArcGIS GeoEvent Server	unionnc-p-geoevent01	1	PRD	100	100	200	4 vCPUs 16GB RAM
AWS - ArcGIS Hosting Server	unionnc-p-ags-hst01	1	PRD	100	100	200	4 vCPUs 16GB RAM
AWS - ArcGIS Portal	unionnc-p-prt01	1	PRD	100	100	150	4 vCPUs 16GB RAM
AWS - ArcGIS Relational DataStore	unionnc-p-ds01	1	PRD	100	100	100	4 vCPUs 16GB RAM
AWS - ArcGIS Server	unionnc-p-ags-util01	1	PRD	100	100	200	8 vCPUs 32GB RAM
AWS - ArcGIS Spatiotemporal Datastore	unionnc-p-stds01	1	PRD	100	100	300	4 vCPUs 16GB RAM
AWS - Citrix Server	unionnc-p-ch02	1	PRD	100	100	250	8 vCPUs 32GB RAM
AWS - License Server	unionnc-p-cc-lm	1	PRD	100	100	100	2 vCPUs 8GB RAM
AWS - SQL Server	unionnc-p-sql01	1	PRD	100	100	300	8 vCPUs 32GB RAM
AWS - Web Server	unionnc-p-web01	1	PRD	100	60		2 vCPUs 8GB RAM
AWS - ArcGIS Image Server	unionnc-p-img01	1	PRD	100	100	200	4 vCPUs 16GB RAM
AWS - ArcGIS Server	unionnc-p-ags-cnty01	1	PRD	100	100	200	8 vCPUs 32GB RAM
AWS - Web Server	unionnc-p-webapp01	1	PRD	100	60		2 vCPUs 4GB RAM
AWS - ArcGIS GeoEvent Server	unionnc-d-geoevent01	1	DEV	50	100	150	4 vCPUs 16GB RAM
AWS - ArcGIS Hosting Server	unionnc-d-ags02	1	DEV	50	100	100	4 vCPUs 16GB RAM
AWS - ArcGIS Portal	unionnc-d-prt01	1	DEV	50	100	150	4 vCPUs 16GB RAM
AWS - ArcGIS Relational DataStore	unionnc-d-ds01	1	DEV	50	100	100	4 vCPUs 16GB RAM
AWS - ArcGIS Server	unionnc-d-ags01	1	DEV	50	100	100	4 vCPUs 16GB RAM
AWS - ArcGIS Spatiotemporal Datastore	unionnc-d-stds01	1	DEV	50	100	200	4 vCPUs 16GB RAM
AWS - SQL Server	unionnc-d-sql01	1	DEV	50	100	200	4 vCPUs 16GB RAM
AWS - Web Server	unionnc-d-web01	1	DEV	50	100		2 vCPUs 8GB RAM
AWS - Web Server	unionnc-p-webapp02	1	PRD	100	50		2 vCPUs 4GB RAM
Infrastructure Monthly Cost							\$7,190.00
Managed Services Monthly Cost							\$5,500.00
Annual total							\$152,280.00
Term							12 Months

Pricing based solely on the Cloud environment outlined.* Infrastructure needs will be reviewed ongoing. Should ~~County of Union, NC Public Works~~ require a change in resources and/or require additional managed services that differ from those listed, ROK Technologies, will work with ~~County of Union, NC Public Works~~ to determine the hardware changes needed, and the associated costs/savings. All changes will be accepted in writing via signed amendment before being executed. Payments are due ~~30 days from receipt of invoice non payment after 60 days will result in suspension of service.~~**

*herein and in the Original SLA.

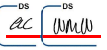
** and services may be suspended in accordance with Section 5.1 of the Original SLA.

* This SLA renews the Original SLA as provided in Section 5 therein. The provisions of this SLA also supersede Section 5 of the Original SLA related to Managed Infrastructure as set forth herein. This SLA also supersedes the total pricing for the SLA (for this renewal term) set forth in Section 11 of the Original SLA.

The initial term of this SLA shall begin on 12/01/2022 and expires in 12 months. ~~Upon expiration, this SLA shall renew for additional one year terms unless either Party provides written notice to the other Party of its intent not to renew at least sixty (60) days in advance of the then current term.~~ Termination of this SLA shall be governed by Section 7 of the MSA. This SLA shall be governed by the terms of the MSA between the parties dated

September 20, 2021, including Exhibit A thereto. This SLA shall also be governed by the terms of the SLA between the parties dated September 20, 2021 (the "Original SLA"), including Exhibit A thereto, unless superseded herein.

Contract Start Date: 12/01/2022

Int 

Contract End Date: 11/30/2023

Payment Option: Annually

Agreed to and Accepted By:

ROK Technologies, LLC

Union County, NC

~~County of Union, NC Public Works~~

Signature:  DocuSigned by:
Alexandra Coleman
795F057307AA415...

Name: Alexandra Coleman

Title: CEO, ROK Technologies

Date: October 11, 2022

Signature:  DocuSigned by:
William M. Watson
A84957CDD7DF479...

Name:

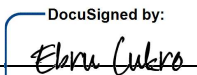
Title: y Manager

Date: November 14, 2022

Verification:

Approved as to Legal Form: BTI

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

 DocuSigned by:
Elmer Culero
Deputy Finance Officer

~~County of Union, NC Public Works~~

Union County, NC ("Client")

Int. ^{DS} ^{DS}
AC *BVM*

AWS, Tenant SLA

December 1, 2023 - November 30, 2024

Service Level Agreement

October 16, 2023

ROK TECHNOLOGIES

1501 Belle Isle Avenue,
Suite 110 PMB1047,
Mount Pleasant SC 29464
info@roktech.net

Union County NC

Service Level Agreement Renewal

December 1, 2023 – November 30, 2024

Pricing based solely on the Cloud environment outline herein and in the Original SLA. Infrastructure needs will be reviewed ongoing. Should Client require a change in resources and/or require additional managed services that differ from those listed, ROK Technologies, will work with Client to determine the hardware changes needed, and the associated costs/savings. All changes will be accepted in writing via signed amendment before being executed. Payments are due and services may be suspended in accordance with Section 5.1 of the Original SLA.

This SLA renews the Original SLA as provided in Section 5 therein. The provisions of this SLA also supersede Section 5 of the Original SLA related to Managed Infrastructure as set forth herein. This SLA also supersedes the total pricing for the SLA (for this renewal term) set forth in Section 11 of the Original SLA. The initial term of this SLA shall begin on 12/01/2023 and expires in 12 months. Termination of this SLA shall be governed by Section 7 of the MSA.

This SLA shall be governed by the terms of the MSA between the parties dated September 20, 2021, including Exhibit A thereto. This SLA shall also be governed by the terms of the SLA between the parties dated September 20, 2021 (the "Original SLA"), including Exhibit A thereto, unless superseded herein.

Name	Server Name	Qty	ENV	Uptime %	OS Storage (GB)	Data Storage (GB)	Log Storage (GB)	Server Size
AWS - ArcGIS GeoEvent Server	unionnc-d-geoevent01	1	DEV	50	100	150		4 vCPUs 16GB RAM
AWS - ArcGIS GeoEvent Server	unionnc-p-geoevent01	1	PRD	100	100	200		4 vCPUs 16GB RAM
AWS - ArcGIS Hosting Server	unionnc-p-ags-hst01	1	PRD	100	100	200		4 vCPUs 16GB RAM
AWS - ArcGIS Hosting Server	unionnc-d-ags02	1	DEV	50	100	100		4 vCPUs 16GB RAM
AWS - ArcGIS Image Server	unionnc-p-img01	1	PRD	100	100	200		4 vCPUs 16GB RAM
AWS - ArcGIS Portal	unionnc-p-prt01	1	PRD	100	100	150		4 vCPUs 16GB RAM
AWS - ArcGIS Portal	unionnc-d-prt01	1	DEV	50	100	150		4 vCPUs 16GB RAM
AWS - ArcGIS Relational DataStore	unionnc-p-ds01	1	PRD	100	100	100		4 vCPUs 16GB RAM
AWS - ArcGIS Relational DataStore	unionnc-d-ds01	1	DEV	50	100	100		4 vCPUs 16GB RAM
AWS - ArcGIS Server	unionnc-d-ags01	1	DEV	50	100	100		4 vCPUs 16GB RAM
AWS - ArcGIS Server	unionnc-p-ags-util01	1	PRD	100	100	200		8 vCPUs 32GB RAM
AWS - ArcGIS Server	unionnc-p-ags-cnty01	1	PRD	100	100	200		8 vCPUs 32GB RAM
AWS - ArcGIS Spatiotemporal Datastore	unionnc-p-stds01	1	PRD	100	100	300		4 vCPUs 16GB RAM
AWS - ArcGIS Spatiotemporal Datastore	unionnc-d-stds01	1	DEV	50	100	200		4 vCPUs 16GB RAM
AWS - Citrix Server	unionnc-p-ch02	1	PRD	100	100	250		8 vCPUs 32GB RAM
AWS - License Server	unionnc-p-cc-lm	1	PRD	100	100	100		2 vCPUs 8GB RAM
AWS - S3 Bucket - 1TB		3						
AWS - SQL Server	unionnc-p-sql01	1	PRD	100	100	300		8 vCPUs 32GB RAM
AWS - SQL Server	unionnc-d-sql01	1	DEV	50	100	200		4 vCPUs 16GB RAM
AWS - Web Server	unionnc-p-web01	1	PRD	100	60			2 vCPUs 8GB RAM
AWS - Web Server	unionnc-p-webapp02	1	PRD	100	50			2 vCPUs 4GB RAM
AWS - Web Server	unionnc-d-web01	1	DEV	50	100			2 vCPUs 8GB RAM
AWS - Web Server	unionnc-p-webapp01	1	PRD	100	60			2 vCPUs 8GB RAM
Citrix Seat		12						
Infrastructure Monthly Cost								\$7,570.00
Managed Services Monthly Cost								\$5,500.00
Total Monthly Cost								\$13,070.00
Annual total								\$156,840

~~Pricing based solely on the Cloud environment outlined. Infrastructure needs will be reviewed ongoing. Should County of Union, NC Public Works require a change in resources and/or require additional managed services that differ from those listed, ROK Technologies, will work with County of Union, NC Public Works to determine the hardware changes needed, and the associated costs/savings. All changes will be accepted in writing via signed amendment before being executed.~~

~~Payments are due 30 days from receipt of invoice non-payment after 60 days will result in suspension of service.~~

Int.  

~~The initial term of this SLA shall begin on and expires in 0 months. Upon expiration, this SLA shall renew for additional one-year terms unless either Party provides written notice to the other Party of its intent not to renew at least sixty (60) days in advance of the then current term. Termination of this SLA shall be governed by Section 7 of the MSA.~~

Int.  

Contract Term: 12 Months

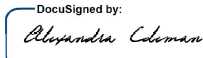
Contract Start Date: 12/01/2023

Contract End Date: 11/30/2024

Payment Option:

Agreed to and Accepted By:

ROK Technologies, LLC

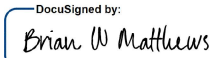
Signature: 
Name: Alexandra Coleman

Title: CEO, ROK Technologies

Date: February 5, 2024

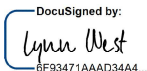
Union County, NC

~~**County of Union, NC Public Works**~~

Signature: 
Name: Brian Matthews

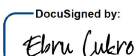
Title: County Manager

Date: February 5, 2024

Verification: 

Approved as to Legal Form: KLC

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


 Deputy Finance Officer

Cloud GIS Managed Services

Contract Name:

Union County, NC SOW (12-1-2025 to 11-30-2026)



1501 Belle Isle Avenue
Suite 110 PMB1047
Mount Pleasant SC 29464
info@roktech.net

1. Introduction

ROK Technologies has been delivering GIS Managed Cloud Services for over a decade. As an Esri Platinum Partner, our sole focus is architecting, deploying and managing the ArcGIS® Enterprise suite and Desktop applications in cloud and hybrid environments. We serve hundreds of organizations in multiple verticals ranging from Fortune 500 companies to small local municipalities.

Union County, NC (hereafter referred to as “Client”) has engaged ROK Technologies, LLC (hereafter referred to as “ROK”) to perform implementation and managed services related to and in support of Client’s AWS cloud environment and Esri ArcGIS® Enterprise software.

This Statement of Work (“SOW”) dated 12-01-2025 sets forth the scope of services, support, roles and responsibilities identified and agreed upon in addition to the terms and conditions under which the services shall be conducted.

ROK appreciates your investment and is dedicated to supporting the health and efficiency of its essential GIS and IT resources.

2. ROK’s GIS Cloud Support and Managed Services

This section outlines the General, Esri Software, and Infrastructure related ongoing Managed Services the ROK Team will provide Client for the new Enterprise GIS environment. Our goal is to take the GIS and IT management off your plate so you can focus on what you do best!

General Services

Dedicated Client Success Manager

ROK’s primary goal is to provide Client with flawless service, becoming an extension of Client’s technical team of experts. Serving as Client’s single point of contact, ROK Technologies assigned Client Success Manager’s primary responsibilities shall include:

- Understanding Client’s business needs
- Managing Client’s ROK Technologies entitlements
- Accelerating the delivery of ROK’s Technical Services
- Scheduled Business Reviews

Client Support

Client Support Tickets can be submitted 24 hours a day, 7 days a week via the Client Gateway or our toll-free support line which will be provided after execution of contract. Additional support details can be found in **Exhibit C**.

Esri Software Support and Services

The goal of ROK's Esri COTS Support and Services is to ensure your Enterprise stays up to date with the latest upgrades, configurations, and updates to meet your organizational requirements. In order for ROK to provide the following services, Client agrees to provide the ROK Team with the following access:

Software Services Requirements:

- Client provides the ROK Team with access to their My.Esri.com account via a new user (email to be provided by ROK) with permission to 'Take Licensing Actions.'
- ROK's Monitoring Agent installed in the Cloud Environment.

Software Services – Incident Tracking

- Receive and respond to incidents reported by the Client in accordance with the service levels defined in **Exhibit C**.
- Record and track each incident in ROK's case management system.
- Periodically report the current status of the incident to designated Client personnel based on severity of issue outlined in **Exhibit C**.
- Communicate the steps taken to ultimately resolve the incident.

Esri Software Configuration Assistance

- Collect information from Client regarding the scope of the change requested, the motivation for the change, and the expected results.
- Investigate the potential impact of the change, in terms of desired results and unintended consequences.
- Determine the steps necessary to implement the change while mitigating risk.
- Recommend a course of action to Client.
- Implement changes in accordance with the plan of action upon Client authorization.
- Record the change in accordance with Client's change management processes.

Esri COTS Application Upgrades, Patches and Updates

- Upon request, ROK's Managed Services Team will upgrade and configure Esri COTS to the desired version. Additionally, upon request, ROK's Managed Services will install critical and optional patches as they are released.

ROK will communicate critical upgrade and patching opportunities for Esri COTS. If desired, both parties will work to schedule a day and time to complete the upgrade and/or patching that limits disruption of service.

- Upon request, ROK's Managed Services will install and configure new Esri COTS as desired by Client.
- Esri critical security patches will be reviewed by ROK for potential impact and applied based on an agreed upon schedule.

Third Party (Non-ESRI) Apps and Integrations

ROK Responsibilities:

ROK will provide reasonable **assistance** to the client with the installation of third-party applications within the ROK Managed ArcGIS Enterprise Environment, such as:

- Providing third-party vendor access as requested and defined by our customers.
- Configuring the ArcGIS platform for integrations, as specified by the selected third party (opening ports, configuring certificates, users, etc.).

Client Responsibilities:

- Clients are responsible for software requirements gathering.
- Clients are responsible for updating and patching all third-party software and accept any security or performance issues introduced by the third-party software.
- To obtain administrative rights for updating/patching software on ArcGIS Enterprise machines, clients must submit a ROK Support Case.
- Coordinate meetings between ROK and the third-party application vendor when needed.

ROK DISCLAIMS ALL WARRANTIES, OBLIGATIONS, AND RESPONSIBILITY FOR THIRD-PARTY APPLICATIONS PLACED BY CLIENT IN THE CLOUD ENVIRONMENT THAT ARE NOT MANAGED BY ROK. AS BETWEEN ROK AND CLIENT, CLIENT IS EXCLUSIVELY RESPONSIBLE FOR ENSURING THE SECURITY (INCLUDING BY INSTALLING ALL UPDATES AND PATCHES) OF SUCH THIRD-PARTY APPLICATIONS.

Infrastructure Support and Services

The primary goal of ROK's infrastructure support is to reduce the risk of system failure and to mitigate the impact of unplanned outages should they arise. The scope, deliverables, and terms of ROK's Infrastructure Support services are described below in the following sections and **Exhibit C**.

Infrastructure Services

Management of OS Updates and Patches | ROK Managed Services handles the deployment of critical and security updates to your managed virtual machine operating systems. OS Patching activities help keep your resources current and secure and are automated and monitored as they are released. Any non-critical/security OS patches and other non-managed (i.e., NOT ESRI) applications are not the responsibility of ROK. Clients can work with ROK to identify any additional OS patches of concern and ROK will install. Non-managed applications are not the responsibility of ROK, unless explicitly agreed to.

Infrastructure Monitoring and Response | ROK Managed Services monitors the overall health of your ArcGIS infrastructure resources and handles the daily activities of investigating and resolving alarms or incidents. Committed to a 2-hour maximum response time, in the event of an instance failure, our team would take appropriate action to help minimize or avoid service interruption.

Infrastructure Changes | ROK assumes the responsibility of rightsizing, adding, and removing GIS and associated Cloud infrastructure as necessary, pending client approval. In emergency response situations, the client grants ROK the authority to implement modifications, ensuring uninterrupted uptime for the environment.

BackUp and Retention | ROK assumes the responsibility of running and retaining the backups of the VMs and Enterprise GeoDatabases per the frequency and duration listed on the BackUp and Retention Table.

Virtual Desktop Management | ROK provides ongoing support for ArcGIS Pro and/or Desktop on your VDI Solution. The management of any additional software or application is the sole responsibility of the Client and ROK cannot be held liable for any inherent security or performance issues introduced.

3. Exclusions – ROK Service and Support does not include the Following:

- Debugging custom components, applications, code, or models
- Customization of solutions, templates, or tools; including unsupported software functionality. Please contact Esri's consulting services for assistance in this area.
- Workflow design, data processing, data design, or software training. Please explore Esri's training resources or contact Esri's consulting services for assistance in these areas.
- Issues specific to third-party hardware, software, technology, or peripherals not provided by Esri
- Questions related to product pricing, license agreements, or contracts. Please contact Esri Sales for more product information.
- Web or Mobile Application Development
- Data editing and analysis
- ArcGIS Monitor interpretation and analysis
- Script authoring and maintenance
- Configuration of ArGIS Enterprise Collaborations (ArGIS Enterprise or ArGIS Online)

4. Assumptions

ROK's delivery of the services defined by this Agreement is based on the assumptions described below. Any deviation from these assumptions might impact the scope of services to be provided and associated fees:

- ROK Technologies shall primarily render Support services remotely, while making use of current technologies that provide remote access and control of the supported systems where available.
- Client shall permit the use of remote access technologies that enable ROK Technologies to render services remotely.

5. Scheduling

As part of these offerings, ROK Technologies will conduct proactive scheduling with Client. As scheduling changes arise, Client shall contact ROK Technologies one (1) to two (2) weeks in advance where possible. The ROK Technologies Technical Operations Team will make a best effort to accommodate special requests.

6. Change Control Policy

As ROK Technologies and Client collaborate on this Statement of Work, it is possible that either party will find reasons to change the scope of this Agreement. In the event that Client would like to discuss the addition or subtraction of specified, agreed upon services, Client will submit a Service Request to ROK. Client's, ROK Technologies Account Manager will make contact within one (1) business day to review or schedule a review of this request.

7. Disclaimers

In addition to the disclaimers and limitations set forth in **Exhibit D** Master Services Agreement (MSA), Client understands and agrees as follows with respect to the Managed Services rendered hereunder:

ROK is not responsible for the loss of data caused by the action(s) of Client. No warranty or service contract covers infection of any system with a virus introduced by Client. All work necessary for ROK Technologies to remove viruses will be billed to Client. Work performed under a service contract is governed by the terms of said service contract.

The uptime, support requirements, and response times set forth in this SOW shall not be binding upon ROK for any occurrence, failure of service, or other malfunction caused by Client, any employee, vendor or other agent of Client, or any inability of ROK to obtain the minimum access to Client's system.

8. Acceptance

This Agreement constitutes the full agreement between ROK and Client for the Managed Services described herein.

Upon execution by the Parties, this Statement of Work, or "SOW" issued under, integrated with, and governed by the Master Services Agreement "Exhibit D" between the Parties. Capitalized terms not defined in this SOW shall have the meaning ascribed to them in the MSA.

The undersigned parties acknowledge their acceptance of this SOW and the terms and conditions described herein. Furthermore, the undersigned parties certify that they are authorized representatives of their respective companies with full authority to sign this SOW and enter into this Agreement on behalf of their respective organizations.

9. Term, Pricing, and Billing

The Managed Services hereunder are billed Annually. The billing amount for this SOW shall be based on the services described in the table below. Terms of payment are Net 30 Days. Late fees will be applied on invoices greater than sixty (60) days from the date invoiced and can result in suspension of services.

Services	
Esri Software Support	
Cloud Infrastructure Support Services	
Virtual Desktops	12
Monthly Cost	\$13,656.00
Term	12 Months
Annual Cost	\$163,872.00

The initial term of this SOW shall begin on 12-01-2025 and expires in 12 months. Upon expiration, this SOW shall automatically renew for an additional one (1) year term unless either Party provides written notice to the other Party of its intent not to renew at least sixty (60) days before the expiration of the then-current term.

Infrastructure and services will be reviewed on an ongoing basis. Should Union County, NC require a change in resources that differ from those listed in this SOW, ROK Technologies will communicate the necessary changes to Union County, NC along with the associated costs/savings.

Any general price increase will be communicated in writing before the auto-renewal. General price increases will not exceed 7% of the applicable services in the prior term unless the pricing for the previous term was designated in the SOW as promotional or one-time.

Payments are due 30 days from receipt of the invoice. Non-payment after 60 days can result in suspension of service.

Exhibits A through E are hereby incorporated into the provisions of this contract.

Contract Term: 12 months

Contract Start Date: 12-01-2025

Contract End Date: 11-30-2026

Payment Option: Annually

Agreed to and Accepted By:

ROK Technologies, LLC

Signature: 

Name: Alexandra Coleman

Title: CEO, ROK Technologies

Date: Sep 3, 2025

Client

Signature:

Name:

Title:

Date:

Signature:

Name:

Title:

Date:

Exhibit A: Environment Overview

Infrastructure Details Table

Environment	Name	Server Name	Qty	Up time %	OS (GB)	Data (GB)	Log (GB)	Server Size
Production	AWS - ArcGIS GeoEvent Server	unionnc-p-geoevent01	1	100	100	200		4 vCPUs 16GB RAM
Production	AWS - ArcGIS Hosting Server	unionnc-p-ags-hst01	1	100	150	200		4 vCPUs 16GB RAM
Production	AWS - ArcGIS Image Server	unionnc-p-img01	1	100	100	200		4 vCPUs 16GB RAM
Production	AWS - ArcGIS Portal	unionnc-p-prt01	1	100	150	150		4 vCPUs 16GB RAM
Production	AWS - ArcGIS Relational DataStore	unionnc-p-ds01	1	100	100	100		4 vCPUs 16GB RAM
Production	AWS - ArcGIS Server	unionnc-p-ags-util01	1	100	100	200		8 vCPUs 32GB RAM
Production	AWS - ArcGIS Spatiotemporal Datastore	unionnc-p-stds01	1	100	100	300		4 vCPUs 16GB RAM
Production	AWS - Citrix Server	unionnc-p-ch02	1	100	400	450		8 vCPUs 32GB RAM
Production	AWS - License Server	unionnc-p-cc-lm	1	100	100	100		2 vCPUs 8GB RAM
Production	AWS - SQL Server		1	100	200	300	100	8 vCPUs 64GB RAM
Production	AWS - SQL Server	unionnc-p-sql01	1	100	200	300	250	8 vCPUs 64GB RAM
Production	AWS - Web Server	unionnc-p-web01	1	100	100			2 vCPUs 8GB RAM
Production	AWS - Web Server	unionnc-p-webapp02	1	100	200			2 vCPUs 8GB RAM
Production	Citrix Workspace License(s)		12					
	AWS - S3 Bucket - ITB		7					

Applications

Environment	Server	Application
Production	ArcGIS GeoEvent Server	ArcGIS GeoEvent
Production	ArcGIS Hosting Server	ArcGIS Server
Production	ArcGIS Image Server	ArcGIS Server - Image
Production	ArcGIS Portal Server	Portal for ArcGIS
Production	ArcGIS Relational Data Store	ArcGIS Datastore
Production	ArcGIS Server	ArcGIS Server
Production	ArcGIS Spatiotemporal Data Store	ArcGIS Datastore
Production	License Server	ArcGIS License Manager
Production	Web Server	ArcGIS Web Adaptor
Production	Web Server	ArcGIS Web Adaptor
Production	Web Server	ArcGIS Web Adaptor
Production	Web Server	ArcGIS Web Adaptor
Production	Web Server	ArcGIS Web Adaptor
Production	Web Server	ArcGIS Web Adaptor
Production	Web Server	ArcGIS Pro
Production	Web Server	FME Server

Integrations

The following table lists integrations and interfaces that will be included in the Enterprise GIS environment. These are shown in alphabetical order. ROK's role in assisting CLIENT with these integrations includes the following:

- Addressing any IT considerations in relation to ArcGIS or the cloud environment (opening ports, configuring certificates, users, etc.)
- Providing reasonable third-party access as requested and defined by Client.
- Configuring the ArcGIS system for integrations, as specified by the selected third party.
- Client will be required to ensure all business interfaces and workflows are tested and working correctly.

Integrations Table

Interface	Description
No App Integrations	N/A

Virtual Desktop Solution(s)

Server	Server Size	OS Drive (GB)	Data Drive (GB)
AWS – Citrix Server	8 vCPUs 32GB RAM	400	450

VDI Service	Qty	Description
Citrix Workspace License(s)	12	
The VDI Solution is scoped to support the software and/or applications defined in the VDI Applications Table below. Any additional software and/or applications installed by Client or by ROK by request can impact performance and may result in a change in scope.		

VDI Application(s)	Description
ROK Supported Software ROK supports ArcGIS Pro and Desktop on your VDI Solution. The management of any additional software or applications is the sole responsibility of the Client and ROK cannot be held liable for any inherent security or performance issues introduced.	

Exhibit B: Content Summary

No content will be migrated into the Cloud environment as part of this SOW

Exhibit C: Support

Client Support

Tickets can be submitted 24 hours a day, 7 days a week via the toll-free number which will be provided after execution of contract. Tickets may also be submitted any time via email or from the Client Gateway. Contact emails and Client Gateway information will be provided following execution of contract.

Support Overview

Client Gateway (“Gateway”): ROK will provide the Client with unlimited access to Gateway support. Client will report malfunctions by accessing the Gateway and creating a service ticket or by sending an email to a dedicated support email address. A member of ROK’s Support Staff (“Support Staff”) will be assigned and Client will be contacted within a timeframe defined by the severity of the Malfunction. If the Support Staff member handling a request is unable to provide adequate assistance to Client for such requests hereunder, ROK will supply one or more alternative Support Staff members who are able to respond to the request to Client’s reasonable satisfaction. All support ticket activities, findings, and resolutions will be tracked in the customer portal for future reference.

Telephone Support Service: ROK will provide to Client unlimited access to 24/7 Telephone Support (“Telephone Support”) via a toll-free number. Client will report Malfunctions by calling the Telephone Support number. A member of the Support Staff will be assigned to the Malfunction, and Client will be contacted within the timeframe defined by the severity of the Malfunction.

Severity of Malfunctions

ROK will correct Malfunctions as provided herein. “Malfunction” shall mean a failure by the Services to operate as required by this Agreement. The definitions of the Malfunction Severity classifications are as follows:

Severity Level 1: A problem which renders the Services inoperative, causes a significant and ongoing interruption to the end-user’s business activities or causes a loss or corruption of data, where either the entire company or large groups of users are affected.

Severity Level 2: A problem which causes the Services to be intermittently inoperative, disrupted or malfunctioning and which materially interferes with Client’s use of the Services, for the entire company or large groups of users.

Severity Level 3: A problem which causes the Services not to function in accordance with applicable specifications, for small groups or individual users, but which causes only a minor impact on Client’s use of the Services and for which an acceptable circumvention is available.

Severity Level 4: Any general questions and issues pertaining to the Services and all Malfunctions which are not included in the other Malfunction classifications.

Correction of Malfunctions

ROK will correct Malfunctions as provided herein. "Malfunction" shall mean a failure by the Services to operate as required by this Agreement. The definitions of the Malfunction classifications are as follows:

Report of Malfunction With respect to a report of any Malfunction, Client personnel making such a report will describe to the Support staff the Malfunction in reasonable detail and the circumstances under which the Malfunction occurred or is occurring and will, based upon the criteria of the Severity Definition, classify the Malfunction as a Severity Level 1, 2, 3 or 4 Malfunction.

Critical Malfunctions If a Severity Level 1 or 2 Malfunction (each, a "Critical Malfunction") cannot be corrected to Client's reasonable satisfaction through communication with the Support staff within two (2) hours after ROK receives the description of the Malfunction, ROK will: (1) escalate the problem to additional members of Support Staff and ROK's Client Success Manager; (2) take and continue to take the actions which will most expeditiously resolve the Critical Malfunction; (3) provide a report to Client of the steps taken and to be taken to resolve the problem, the progress to correction, and the estimated time of correction, and update that report every two (2) hours until the Critical Malfunction is resolved.

ROK's Level of Effort ROK will work continuously until any Critical Malfunction, of which a correction or workaround has not been achieved, has been resolved. Additionally, if a correction or workaround to a Critical Malfunction has not been achieved within two (2) days ROK will work continuously, during normal ROK working hours, try to resolve any Severity Level 1 or 2 Malfunction. ROK and Client will mutually agree upon a schedule within which to resolve any Severity Level 3 or 4 Malfunction.

Action Required from ROK For Critical Malfunctions, ROK will work to provide an immediate correction, which will then be promptly implemented for the Client staff to test. For a Severity Level 3 or 4 Malfunction, ROK will provide a correction as promptly as reasonably achievable.

Backup Frequency and Retention Period

ROK Technologies provides 24/7 monitoring and management of backup and retention processes for Virtual Machine (VM) attached disks and SQL Server instances to ensure data integrity and availability. Backup specifications and retention details are listed below. Backup failures trigger immediate alerts, and corrective actions are taken promptly. Clients are responsible for notifying ROK Technologies of any changes in backup requirements.

Service	Qty
VM and Volume - Daily Full Backup (#/day)	2
VM and Volume - Daily Full Backup Retention (mo)	1
VM and Volume - Monthly Full Backup Retention (mo)	12
SQL Server - Daily Differential Backup (#/day)	4
SQL Server - Daily Differential Backup Retention (mo)	1
SQL Server - Weekly Full Backup (#/week)	1
SQL Server - Weekly Full Backup Retention (mo)	1
SQL Server - Monthly Full Backup Retention (mo)	12

Exhibit D: Master Services Agreement

This Master Services Agreement (the “**MSA**”) is effective as of December 1, 2025 (the “**Effective Date**”) by and between ROK Technologies, LLC (“**ROK**”) and Client. ROK and Client are each individually referred to herein as a “**Party**” and collectively as the “**Parties**.” This MSA shall govern the Parties’ relationship as more fully described in Statements of Work (each, an “**SOW**”) agreed upon between the Parties pursuant to the terms of this MSA. This MSA anticipates the execution of various written SOWs and the following terms shall apply to such SOWs. The MSA, SOW and all exhibits, addendums and/or amendments thereto are collectively referred to herein as the “**Agreement**.”

A. RECITALS

ROK is in the business of architecting, hosting and managing the infrastructure for geographical information system—or “GIS”—computing systems.

Client seeks to hire ROK to provide certain Services in relation to Client’s own GIS Platform, and ROK desires to provide the Services pursuant to the terms and conditions of this Agreement.

NOW, THEREFORE, in consideration of the mutual covenants, terms, and conditions set forth herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

B. SELECT DEFINITIONS

“**Client’s Platform**” or the “**Platform**” means the collection of Client’s data and applications managed by ROK pursuant to this Agreement.

“**Managed Services**” means the management of Client by ROK pursuant to a Statement of Work.

“**Non-Tenant**” means client when client owns the infrastructure supporting the Esri Enterprise software.

“**Professional Services**” means any and all Services rendered by ROK to Client pursuant to a SOW other than Managed Services, such as consultation, data assessment and recommendations, and so forth.

“**Services**” means any and all Services rendered by ROK to Client pursuant to a SOW, including all Managed Services and Professional Services.

C. SERVICES

Services. Services will be provided by ROK pursuant to the terms and conditions of this Agreement and any applicable SOW.

ROK may use subcontractors (under separate contract to ROK) to perform the Services, or portion(s) thereof.

D. SOWs

1. **Form of SOW** ROK will not proceed with performing Services until both Client and ROK have signed the applicable SOW. Each SOW, once signed by both Parties, will become a part of this Agreement. Each SOW must be in writing and should include, at a minimum:
 - a. Description of Services and deliverables in sufficient detail to gauge the successful progress and completion of the Services;
 - b. Period of duration expected date(s) of completion (by phase/milestone or entire project) or delivery of deliverables, and/or other performance timetable;
 - c. If applicable, designated means of performance, including identification of any particular roles or individuals required to participate in the Services;
 - d. Resources required from Client for performance of the Services, such as access to particular information, systems, or environments, involvement of specific personnel, and so forth;
 - e. If applicable, acceptance criteria and testing period, permissible reasons for rejection and ROK's duty to remedy the same, if any;
 - f. Fees owed to ROK for the Services, along with method of computation (e.g., fixed fee or hourly rate) and timing/conditions of payment (e.g., milestone-based);
 - g. Description and estimated amounts of any significant reimbursable expenses expected to be incurred; and
 - h. Identification of the Client department responsible for overseeing the project and Client's employee designated as project owner.
2. **Amendment** SOWs may only be amended by a written document signed by each Party's authorized representative, and per the change management procedures set forth there.
3. **Governance** Each SOW will, upon execution by both of the Parties hereto, be incorporated into and become part of this Agreement. In the event of any conflict between this Agreement and any SOW, the terms and conditions of the applicable SOW shall control as to the specific deliverables and Services addressed in said SOW, and this Agreement shall control as to all other matters.

E. PRICING

1. **Pricing** Prices for Services will be specified in one of the following, as applicable to the Services to be provided:
 - a. Those specified in ROK's then-current price list
 - b. Those specified in a written price quotation submitted by ROK; or
 - c. Those specified in the SOW; or
 - d. Incidental extra fees agreed-upon by the Parties from time to time
2. **Taxes** All prices are exclusive of any taxes, fees, duties or other applicable amounts. Client shall pay the taxes related to Services purchased pursuant to this Agreement, or Client shall present an exemption certificate acceptable to the taxing authorities. Applicable taxes, if any, will be billed as a separate item on the invoice. ROK reserves the right to increase the fees for Services in the event Client determines any withholding tax obligation prevents ROK from receiving the specified prices for such Services.

F. PAYMENT AND INVOICING

Payment Unless otherwise indicated in a SOW, payment terms are net 30 days. Any sum not paid by Client within sixty (60) days from the date of the invoice will bear interest from the date of the invoice until paid at a rate of: (i) ten (10) per cent per annum or (ii) the maximum rate permitted by law, whichever is less.

- **Invoicing** As set forth below, ROK will invoice Client depending on the type of Services:
 - a. For Managed Services, unless otherwise agreed by the Parties in the applicable SOW, ROK will invoice Client for such Services, and payment will be due, in advance of performance of the same.
 - b. For Professional Services, ROK will invoice Client per the SOW's invoicing schedule. Invoices may contain multiple milestones or a single invoice at the start or end of the project. Unless otherwise mutually agreed upon in writing or via a change management procedure, the total invoiced amounts for SOW milestones shall not exceed the total amount agreed upon in the SOW. If a SOW does not contain a milestone schedule, ROK will invoice Professional Services performed under such SOW as set forth in such SOW.
- **Deposit** ROK reserves the right to charge Client a deposit for payment on any SOW.
- **Disputed Charges** Written notice of any disputed charge must be received by ROK within 20 days of the date of issuance of the invoice in question or Client forfeits the right to dispute the charge. This notice must include the invoice number in dispute, the item(s) and amount(s) disputed and a complete description of the basis for Client withholding payment. Notice of any disputed charge does not release Client from the obligation of paying any remaining balance of the invoice under the terms specified. Upon resolution of the disputed charge, ROK will issue a credit memo or Client will pay the total amount outstanding referenced by the dispute. Any disputed charge resolved in ROK's favor shall be liable to accrue late payment fees based on the terms of purchase.
- **Collections** If payment has not been received within the three-month period after the due date, ROK will have no other option but to undertake collection and enforcement efforts. If collection and enforcement efforts are undertaken by ROK, Client shall be liable for all costs thereof, including reasonable attorneys' fees. If Client is in arrears on any invoice, ROK may, upon giving notice, apply any deposit thereto and suspend, withhold or terminate further performance of Services until all arrearages are brought current.

G. TERM, SCOPE, AND TERMINATION

1. **Term** The term of this Agreement will commence on the Effective Date and, unless terminated pursuant to this section, shall remain in effect until the later of one (1) year after the Effective Date or (2) sixty (60) days after completion of all rights and obligations by each Party under any SOW, so long as no other SOWs are outstanding.
2. **Change of Scope** ROK reserves the right to change the scope and content of any of the Services upon client amendment approval.
3. **Termination** This Agreement, and any Services being performed hereunder, may be terminated immediately by either Party upon written notice:
 - a. If the other Party breaches any of the material provisions of this Agreement and the breach is not capable of being cured or after providing thirty (30) days written notice to the breaching Party if the breaching Party fails to cure such breach within such period;
 - b. If the other Party: ceases, or threatens to cease to carry on business as a going concern; or becomes or may become the object of the institution of voluntary or involuntary proceedings in bankruptcy or liquidation, or a receiver or similar officer is appointed with respect to the whole or a substantial part of its assets; or an event similar to any of the foregoing occurs under applicable law;

- c. If, except as provided below, either Party assigns (by operation of law or otherwise, including merger) or transfers any of the rights or responsibilities granted under this written agreement, any support agreement, or any SOW, without the prior written consent of the other Party, or in the event of a sale of all or substantially all of such Party's assets or transfer of a controlling interest in such Party to an unaffiliated third Party. Notwithstanding the foregoing: ROK reserves the right to subcontract Services to any affiliate or third-party organization to provide Services to Client, and ROK may assign this Agreement or all or any portion of its rights and obligations hereunder, to any affiliate of ROK; and/or
 - d. If fees are not paid when due and payment has not been received within thirty (30) days after notice from ROK to Client of such past due payment, ROK may suspend or withhold the provision of Services until all amounts past due are paid in full, and/or immediately terminate this Agreement or any Services provided hereunder.
4. **Early Termination** Client's termination of this Agreement or any SOW prior to the expiration of the then-current term thereof (including, without limitation, by ceasing payments under the Agreement) shall result in each of the following:
- a. Client shall pay to ROK an "Early Termination Fee" in the amount of five thousand dollars (\$5,000); and
 - b. In addition to the foregoing Early Termination Fee, Client shall pay to ROK the greater of (i) the remaining fees due under the Agreement for the remainder of the then-current term, or (ii) an amount equal to the fees payable for one (1) full year of the Services, calculated based on the average monthly (or other periodic) fees paid by Client during the six (6) months immediately preceding the termination date (or, if Client has not yet paid for six months of Services, based on the initial monthly fee).
 - c. In the event Client has prepaid any fees for Services beyond the date of termination, Client acknowledges and agrees that such prepaid fees shall be forfeited and are non-refundable.
 - d. All amounts due under this Section shall be immediately due and payable upon the effective date of termination. ROK reserves the right to invoice Client for such amounts, and Client agrees to pay such invoice within fifteen (15) days of the invoice date.
5. **Effect of Termination**
- a. If, following termination of this Agreement, the Parties execute an SOW, then any such SOW will be governed by the terms and conditions of this Agreement notwithstanding the earlier termination of this Agreement, unless and until the Parties execute a new MSA to govern the SOW.
 - b. Each of the Services provided hereunder will terminate immediately upon termination of this Agreement, unless otherwise agreed by the Parties. Notwithstanding the foregoing, the Parties' ongoing obligations under any non-terminated SOWs will continue through the end of their defined term, unless otherwise agreed by the Parties in writing.
 - c. Upon termination of this Agreement or any Services, Client shall pay ROK for all work ROK has performed up to the Effective Date of termination at the agreed upon prices, fees and expense reimbursement rates.

H. BACKUPS; DATA LOSS OR CORRUPTION

Data Loss or Corruption. ROK is not responsible for any loss, alteration, destruction, damage, or corruption of data resulting from Client's introduction of a virus or other corrupting force (a "**Virus**"). Any warranty or service contract does not cover infection of any Client application or system with such as a Virus. Any virus not expressly introduced by ROK shall be deemed a Virus introduced by Client. ROK may, at its discretion, bill Client for the Professional Services required to remove a Virus and restore the system.

I. Client RESPONSIBILITIES AND RESTRICTIONS

Tenant Responsibility for Certain Factors Affecting Uptime. The service commitment and hourly or uptime commitment do not apply to any unavailability, suspension or termination of an included Service, or any other included Service performance issues: (i) caused by factors outside of ROK's reasonable control, including any force majeure event or internet access or related problems beyond the demarcation point of the applicable included Service; (ii) that result from any actions or inactions of Client or any third party, including failure to acknowledge a recovery volume; (iii) that result from Client's equipment, software or other technology and/or third party equipment obtained by Client, software or other technology (other than third-party equipment within ROK's direct control); (iv) that result from Client or third-party (including Cloud provider) policies or protocols inherited by ROK; (v) relating to compliance with laws applicable to Client's industry that are not generally applicable to information technology service providers; or (vi) arising from ROK's suspension or termination of Client's right to use the applicable included Service in accordance with the Agreement. If availability is impacted by factors other than those listed herein or used in ROK's monthly uptime percentage calculation, then ROK may issue a service credit to Client at its exclusive discretion.

For each individual Virtual Machine Instance, ROK will use commercially reasonable efforts to make the Single Virtual Machine Instance available with an Instance-Level Uptime Percentage of at least 99.5%, in each case during any monthly billing cycle. In the event any Single Virtual Machine Instance does not meet the Instance-Level Uptime Percentage, Client will be eligible to receive a Service Credit as described below.

Instance Level Uptime Percentage	Service Credit Percentage
Less than 99.5% but equal to or greater than 99.0%	10%
Less than 99.0% but equal to or greater than 95.0%	30%
Less than 95.0%	100%

J. WARRANTY; DISCLAIMER AND LIMITATIONS

Services Warranty. With respect to Services performed by ROK, ROK warrants to Client, unless otherwise specified in writing, that the Services as and when delivered or rendered, will conform to the standard of care exhibited by reasonably skilled contractors in the industry (network systems integration). Client shall notify ROK in writing within ninety (90) days after provision of the Services in question if any of the Services fail to conform to the standard of care set forth in this Agreement. The passage of the thirty (30) day period after provision of the Services without the notification described herein shall constitute Client's final acceptance of the Services.

Third-Party Product Warranties. With respect to particular products manufactured or supplied by third parties to ROK for resale to Client, ROK MAKES NO WARRANTIES OF ANY KIND IN ADDITION TO OR EXCEEDING THE WARRANTY SUPPLIED OR OFFERED BY THE RESPECTIVE MANUFACTURER OR SUPPLIER, which shall be transferred or assigned to Client, if possible, and Client's recovery is limited to recovery against such manufacturer or supplier for breach of any applicable warranties of manufacturer or supplier. In the event of a claim by Client for breach of product warranty, ROK must follow the warranty policy established by the manufacturer. This policy may require return of the warranted item to the manufacturer for repair. At Client's request, ROK agrees to take all actions reasonably necessary or appropriate to secure Client's rights and to protect its interests under such third-party warranties. Work performed by ROK, not covered by product warranty, will be billed to Client at the applicable ROK rate.

Disclaimer. EXCEPT AS EXPRESSLY PROVIDED HEREIN OR IN ANY SOW, THE SERVICES ARE PROVIDED ON AN "AS IS" BASIS. USE AND RELIANCE ON THE SERVICES ARE AT Client'S OWN RISK. EXCEPT AS EXPRESSLY PROVIDED HEREIN OR IN ANY SOW, ROK EXPRESSLY DISCLAIMS ANY EXPRESS OR IMPLIED WARRANTY RELATING TO THE SERVICES, INCLUDING BUT NOT LIMITED TO THE IMPLIED WARRANTIES OF MERCHANTABILITY, MERCHANTABLE OR

SATISFACTORY QUALITY, FITNESS FOR A PARTICULAR PURPOSE, OR ARISING FROM COURSE OF PERFORMANCE, COURSE OF DEALING, OR USAGE OF TRADE. EXCEPT AS EXPRESSLY PROVIDED HEREIN OR IN ANY SOW, ROK EXPRESSLY DISCLAIMS ANY THAT USE OF OR ACCESS TO THE SERVICES WILL BE CONTINUOUS, UNINTERRUPTED, ERROR-FREE, FREE OF DEFECTS, OR FREE OF TECHNICAL PROBLEMS.

Limitation of Liability. ROK'S LIABILITY UNDER THIS AGREEMENT, WHETHER IN CONTRACT, IN TORT (INCLUDING NEGLIGENCE OR STRICT LIABILITY), UNDER ANY WARRANTY, OR OTHERWISE, IS ABSOLUTELY LIMITED TO CORRECTION OF ANY NONCONFORMITIES IN ANY SERVICES, OR REFUND OF THE PURCHASE PRICE, OR REFUND OF SPECIFIC AMOUNTS PAID FOR PRODUCTS OR SERVICES WHICH FAIL TO CONFORM, AT ROK'S SOLE OPTION AND THE AGGREGATE AMOUNT THEREOF FOR ALL CLAIMS RELATING TO ANY PARTICULAR PRODUCT OR SERVICE SHALL IN NO EVENT EXCEED AN AMOUNT EQUAL TO THE FEES PAID TO ROK UNDER THIS AGREEMENT FOR THE PARTICULAR PRODUCT OR SERVICES WHICH GIVE RISE TO THE CLAIM. EXCEPT FOR THEIR INDEMNIFICATION OBLIGATIONS, UNDER NO CIRCUMSTANCES SHALL EITHER PARTY BE LIABLE FOR ANY INDIRECT, GENERAL, CONSEQUENTIAL, INCIDENTAL, SPECIAL, PUNITIVE, OR OTHER DAMAGES (INCLUDING LOST PROFITS, LOST SAVINGS, LOSS OF DATA OR LOSS OF USE), EVEN IF A PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES OR COULD HAVE REASONABLY FORESEEN SUCH DAMAGES, NOR FOR ANY CLAIMS ARISING FROM Client'S USE OR TRANSFER OF ANY SERVICES SOLD HEREUNDER. NO ACTION, REGARDLESS OF THE FORM, ARISING OUT OF THIS AGREEMENT MAY BE BROUGHT BY Client MORE THAN ONE (1) YEAR AFTER THE OCCURRENCE OF THE EVENTS WHICH GAVE RISE TO THE CAUSE OF ACTION. THE PRICING OF ALL SERVICES AND THE TERMS AND CONDITIONS OF ALL SALES ARE BASED UPON THIS LIMITATION OF LIABILITY.

K. NON-SOLICITATION

During the term of this Agreement and for a period of one (1) year following the end of this Agreement, neither Party will (i) offer employment to any employee of the other Party; or (ii) attempt to directly or indirectly induce any employee of the other Party to terminate his or her employment. In the event of a breach of this section, money or damages may not be an adequate remedy, and, therefore, in addition to any other legal or equitable remedies, each Party shall be entitled to seek an injunction against such breach. The obligations set forth in this section are independent covenants and shall survive termination of this Agreement. Notwithstanding the foregoing, each Party shall be free to offer employment to any employee or subcontractor that directly contacts such Party in response to general public advertisement of employment opportunities (including the use of employment agencies and recruiters).

L. DISPUTE RESOLUTION

Governing Law. This Agreement, including without limitation this Agreement's interpretation, shall be treated as though this Agreement were executed and performed in the State of South Carolina, and shall be governed by and construed in accordance with the laws of the State of South Carolina without regard to its conflict of law principles. The language in this Agreement shall be interpreted in accordance with its fair meaning and not strictly for or against either Party.

1. **Elective Arbitration.** Except to the extent not preempted by the federal arbitration act, 9 U.S.C. §1 et seq. (1970), any claim or controversy arising out of, or relating to, any provision of this contract, or the breach thereof, shall upon written demand of any Party, be settled by three (3) arbitrators in accordance with the Commercial Arbitration Rules then in effect of the American Arbitration Association, to the extent consistent with the laws of the state of South Carolina and the Uniform Arbitration Act, S.C. Code §15-48-10, et seq. The location of the arbitration shall be the AAA facility in or nearest to Charleston, South Carolina, or such other venue as agreed upon in writing by the Parties. An election by any Party to arbitrate under this paragraph shall be binding on all other Parties and their heirs, successors, and assigns. The AAA fees shall be divided equally between the Parties unless otherwise determined by the arbitrators.

2. **Venue.** Subject to and without waiving the arbitration agreement in the preceding paragraph, the proper and exclusive venue for any judicial action between the Parties—including any remedies in aid of arbitration, such as a petition to compel arbitration or confirm an arbitration award—shall be the state and federal courts located in or nearest to Charleston, South Carolina. The Parties stipulate to and agree to waive any objection to the personal jurisdiction and venue of such courts, and further expressly submit to extraterritorial service of process.
3. **Legal Fees.** If any dispute arises between the Parties with respect to the matters covered by this Agreement which leads to a proceeding to resolve such dispute, the prevailing Party in such proceeding shall be entitled to receive its reasonable attorneys' fees, expert witness fees, litigation costs (including arbitration fees and court fees), and any other relief it may be awarded.

M. CONFIDENTIALITY

Confidential Information. "Confidential Information" shall mean and include all of the proprietary, non-public information of either Party disclosed pursuant to or in furtherance of this Agreement including but not limited to all Technical Information as defined herein, information related to ROK fees, and any information relating to markets, customers, products, patents, inventions, procedures, methods, designs, object code, data, programs, improvements, training materials, workflows, and works of authorship. Notwithstanding the foregoing, "Confidential Information" shall not include any information, that the recipient can demonstrate through its records (i) was in its knowledge or possession prior to disclosure by the discloser, (ii) was in the public domain at the time of disclosure or subsequently entered the public domain through no fault of recipient, or (iii) was disclosed to recipient by a third party with the right to make such a disclosure.

1. **Duty of Nondisclosure.** It is expected that, appurtenant to this Agreement, each Party to this may disclose certain Confidential Information to the other Party. Each Party shall refrain from using or exploiting any Confidential Information of the other Party for any purposes or activities other than those specifically authorized in this Agreement. Each Party represents and warrants that it will hold Confidential Information in confidence and protect Confidential Information to the same extent and by the same means it uses to protect the confidentiality of its own proprietary or confidential information that it does not wish to disclose. Neither Party shall disclose or facilitate disclosure of Confidential Information of the other Party to anyone except its employees, independent contractors, or legal or tax advisors who are authorized according to this Agreement and who have a "need to know such information." Each Party shall ensure that the employees, independent contractors, or legal or tax advisors to whom the Confidential Information is disclosed comply with their obligations under this Agreement with respect to the Confidential Information.
2. **Survival.** Each Party's duty of confidentiality with respect to all Confidential Information it receives hereunder will survive termination or expiration of this Agreement and will be binding upon each Party's successors and assigns. Upon termination or expiration of this Agreement, all Confidential Information made available hereunder, including copies thereof, shall be returned to the disclosing Party or shall be certified as destroyed at the request of the disclosing Party. the Parties may disclose, or may have disclosed, to each other, both orally and in writing or in other tangible form, certain confidential information with respect to each Party's business, as well as the Services provided under this Agreement. The Parties hereby agree to keep such information and the terms of this Agreement confidential. The Parties shall not disclose to any other person (except for legal, tax and financial advisors) any information relating to this Agreement or its subject matter and shall treat as confidential all information and documents relating hereto.
3. **Disclosure to Subcontractors.** Notwithstanding any other provision of this Section, ROK shall be authorized to disclose Client's Confidential Information to subcontractors, contractors or employees of a ROK entity who have a legitimate business need to have access to such information. ROK shall be

responsible for any breach of this Agreement caused by any of its subcontractors, employees or agents.

4. **Confidentiality of Agreement.** Neither Party may disclose, advertise, or publish the terms and conditions of this Agreement without the prior written consent of the other Party. Any press release or publication regarding this Agreement is subject to prior review and written approval of the Parties.

N. INTELLECTUAL PROPERTY

Pre-Existing IP. Each Party will retain the exclusive ownership of all of its pre-existing intellectual property, Confidential Information and materials, including, without limitation, proprietary ideas, sketches, diagrams, text, know-how, concepts, proofs of concepts, artwork, software, algorithms, methods, processes, identifier codes or other technology that are owned by a Party prior to commencement of any Services hereunder, or that are otherwise developed by or for such Party outside the scope of this Agreement.

1. **ROK IP.** Except as otherwise expressly set forth in this Agreement or an applicable SOW, ROK owns and will continue to own all right, title, and interest in and to the Services, products, deliverables, data collection tools, reports, scripts, sketches, diagrams, text, know-how, concepts, proofs of concepts, artwork, software, algorithms, methods, processes, identifier codes or other technology provided or developed by ROK (or a third party acting on ROK's behalf) pursuant to this Agreement, including modifications, enhancements, improvements or derivative works of any of the foregoing, regardless of who first conceives or reduces to practice, and all intellectual property in any of the foregoing (collectively "**ROK IP**").
2. **Client IP.** As between Client and ROK, Client at all times retains all right, title and interest in and to all of Client's data and applications provided by Client to ROK hereunder, Client's pre-existing technology and all intellectual property that is developed by Client or by a third party on Client's behalf thereafter, other than ROK intellectual property.
3. **Third-Party Products.** Third party products will always be owned by the applicable third party and will be subject to any applicable third Party license terms.

O. INDEMNIFICATION

1. **Duty.** Each Party, on its own behalf, and on behalf of its respective third-party partners, affiliates, owners, directors, employees, agents, successors, and assigns (collectively, the "**Indemnitor**") will defend, indemnify, and hold harmless the other party and its third-party partners, affiliates, owners, directors, employees, agents, successors, and assigns (collectively, the "**Indemnitee**") from and against all claims, actions, losses, liability, damages, costs, and expenses (including reasonable attorneys' fees and expenses) (collectively, "**Claims**") arising from or related to: (i) any gross negligence or willful misconduct by Indemnitor; (ii) any breach of this Agreement by the Indemnitor; (iii) any violation or alleged violation by Indemnitor of any applicable foreign or domestic, federal, state or local statutes, laws, ordinances, rules and regulations or industry standards; and (iv) any violation or alleged violation by Indemnitor of the rights of any third party, including without limitation, intellectual property rights.
2. **Claim Procedure.** The Indemnitee will provide Indemnitor with prompt written notice of the Claim for which the Indemnitee intends to claim such indemnification, and Indemnitor shall have the right to participate in, and, to the extent the Indemnitor so desires, to assume sole control of the defense thereof with counsel selected by the Indemnitor; provided, however, and notwithstanding the foregoing, that the Indemnitee shall have the absolute right to retain their own counsel, with the fees and expenses to be paid by the Indemnitee. Indemnitor will have no authority to settle any Claim on the Indemnitee's behalf without the written consent of the Indemnitee. Nothing in this Section shall limit any other remedy of the parties. These obligations will survive any termination of the Agreement.

P. GENERAL PROVISIONS

Entire Understanding. This Agreement, along with all Exhibits and Appendices incorporated by reference herein, and all SOWs executed by the Parties pursuant to this Agreement, contains the entire understanding of the Parties with respect to the subject matter contained herein, and shall supersede all prior agreements and understandings, whether written or oral. There are no restrictions, promises, covenants, or understandings other than those expressly set forth herein, and no rights or duties on the part of either Party are to be implied or inferred beyond those expressly provided for. To the extent ROK is required to click to agree or accept any written terms of Client in order to provide the Services (e.g., accepting Client's website terms to access Client's designated environment), the Parties understand and agree that such act is the result of a technological requirement and is of no binding effect upon the Parties.

1. **Severance.** If any provision of this Agreement is held unenforceable or in conflict with the law of any jurisdiction, the validity of the remaining provisions shall not be affected by such holding. The Parties agree to negotiate and amend in good faith such provision in a manner consistent with the intentions of the Parties as expressed in the Agreement, if any invalid or unenforceable provision affects the consideration of either Party.
2. **Modifications and Additions.** No modifications or additions to the terms and conditions of this Agreement shall be binding unless in writing and signed by both Parties.
3. **Assignment.** This Agreement shall be binding upon and inure to the benefit of the Parties and their respective successors and assigns. Neither Party may assign the terms or conditions of this Agreement to a third party, affiliated entity, or related division without the prior written consent of the other Party.
4. **Notices.** All notices provided in connection with this Agreement will be in writing and will be delivered by email and either (i) certified or registered mail, postage prepaid and return receipt requested or (ii) overnight delivery courier (e.g., FedEx) and will be deemed effective upon receipt by the authorized representative at the address set forth above in the preamble, or at such other addresses as the Parties may designate by written notice to each other.
5. **Force Majeure** – ROK may, without liability, suspend or delay performance or cancel this Agreement on account of force majeure or other circumstances beyond its control, including, but not limited to, strikes, acts of God, political unrest, embargo, failure of source of supply, or casualty.
6. **Waiver.** No waiver by either Party of any breach of this Agreement, no matter how long continuing or how often repeated, shall be deemed a waiver of any subsequent breach thereof, nor shall any delay or omission on the part of either Party to exercise any right, power, or privilege hereunder be deemed a waiver of such right, power, or privilege.
7. **Counterparts.** This Agreement may be executed in counterparts, each of which shall be deemed an original, but both of which together shall constitute one and the same instrument.

RFP Exemption Justification Memo

Subject: RFP Exemption Request – GIS Managed Services (ROK Technologies)

From: Luke Fawcett, Assistant Director – Planning & Resource Management

To: Brian Matthews, County Manager

Date: October 6, 2025

Overview

GIS Managed Services refers to the cloud-hosted, vendor-supported infrastructure used to power Union County Water's geospatial systems and tools. In December 2021, Union County first partnered with ROK Technologies to provide a managed ArcGIS Enterprise environment hosted in AWS. This decision was driven by the increasing demands on GIS infrastructure and the growing role of geospatial data in utility operations.

Request

Union County Water in cooperation with Union County IT requests an exemption from the standard RFP process to renew our existing contract with ROK Technologies for Managed Services. This includes management of Union County's AWS-hosted ArcGIS Enterprise environment, which supports essential operational systems, data pipelines, and field programs across the Union County Water Integration Environment: Water, Technology, Infrastructure, and Business Analytics - where GIS serves as a foundational layer connecting asset data, operational workflows, and spatial analysis tools across the utility.

Background

ROK Technologies currently provides fully managed services for our GIS infrastructure, including ArcGIS Enterprise, SQL databases, virtual desktops, backups, monitoring, and system patching. This hosted environment is deeply embedded in multiple systems and operational workflows across Union County Water, including deep asset management, inspections, compliance reporting, capital planning, and customer support tools.

Justification for RFP Exemption

1. **Integration Across Core Systems** - GIS is integrated with Lucity, WIMS, permitting systems, ETLs, and capital planning models. Disrupting this environment would require major reconfiguration of mission-critical systems.
2. **Specialized and Actively Managed Infrastructure** - ROK maintains and supports a complex AWS environment with production and development stacks, SQL servers, monitoring agents, and virtual desktop interfaces. This is not a commodity hosting service; it's a specialized platform requiring specific technical knowledge.



3. **Continuity of Service** - Changing vendors would introduce high risk, cost, and service interruption. ROK has detailed knowledge of our environment, and no other vendor could assume responsibility without extensive onboarding.
4. **Contract Efficiency and Cost** - The contract represents a continuation of current services with no markup or onboarding costs. There is no evidence an RFP process would yield meaningful cost savings without sacrificing performance.

Contract Details

- Vendor: ROK Technologies, LLC
- Contract Type: Managed Services – AWS-hosted ArcGIS Enterprise
- Term: 12 months (Dec 1, 2025 – Nov 30, 2026) with a 1 year optional renewal
- Total Cost: \$163,872 annually
- Scope: Infrastructure hosting, system monitoring, upgrades, VDI support, SQL backups, and Esri software management
- Quote: Attached (SOW dated 2025-09-03)

Recommendation

To ensure continuity of operations and preserve the integrity of our integrated GIS systems, I recommend approval of this RFP exemption for the renewal of our contract with ROK Technologies.

Brian Matthews, County Manager

Date



Union County, NC

Staff Report

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

File #: 25-629

Agenda Date: 11/17/2025

TITLE:

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

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Recognize, receive, and appropriate \$23,316.80 in Bringing Home Value Innovation Funding from Community Care of North Carolina and 2) Approve Budget Amendment #11.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Community Care of North Carolina (CCNC) has awarded Bringing Value Home Innovation Funding to Union County Public Health. This is a one-time grant in the amount of \$23,316.80. The payment represents approximately \$16.70 per member calculated using your March 2025 Medicaid Standard Plan Prepaid Health Plan (PHP) attribution of 1,396 as reported to CCNC in the Beneficiary files from each PHP. As attribution rates vary from month to month, the Innovation Funding grants were calculated using March 2025 attribution data - for consistency and accuracy.

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

- Expanding access to care by offering open access scheduling
- Developing practice-based solutions to reduce unnecessary ED and Inpatient Utilization
- Improving quality performance, particularly for targeted Medicaid PHP Quality Measures
- Employing new ways to engage unengaged patients
- Implementing Practice Innovations that align with CCNC's mission

Grant funds may not be used for lobbying or partisan political activities.

FINANCIAL IMPACT:

The County is awarded \$23,316.80 from Community Care of North Carolina. No County match is required.

BUDGET AMENDMENT

BUDGET	<u>Public Health - Child</u>	REQUESTED BY	<u>Traci Colley</u>
FISCAL YEAR	<u>FY 2026</u>	DATE	<u>November 17, 2025</u>

INCREASE

<u>Description</u>	<u>Amount</u>
Medical Services	3,529.60
Public Assistance-Incentives	2,000.00
Professional Services	13,500.00
Maint Agreements-Computer Software	2,500.00
Miscellaneous	1,787.20

DECREASE

<u>Description</u>	<u>Amount</u>
Dept Serv Charges - 3rd Party	23,316.80

Explanation: Funding to Build and Support Enhanced Community-Based care Delivery to Improve the Health and Quality of Life for All North Carolinians.
Funds received on 6/25/2025. To recognize and appropriate \$23,316.80 in Bringing Home Value Innovation Funding from
Community Care of North Carolina.

DATE 11/17/2025

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>
10130510-5383-11422	Medical Services	3,529.60
10130510-5397-11422	Public Assistance-Incentives	2,000.00
10130510-5381-11420	Professional Services	13,500.00
10130510-5354-11420	Maint Agreements-Computer Software	2,500.00
10130510-5299-11420	Miscellaneous	1,787.20

CREDIT

<u>Code</u>	<u>Account</u>	<u>Amount</u>
10130510-4520-11483	Dept Serv Charges - 3rd Party	23,316.80

Total 23,316.80

Total 23,316.80

Prepared By MEG
 Posted By _____
 Date _____

Number 11



Union County, NC

Staff Report

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

File #: 25-677

Agenda Date: 11/17/2025

TITLE:

Special Revenue Ordinance Amendment - Appropriate Additional ARPA Temporary Savings Fund for Public Health Services

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Recognize, receive, and appropriate \$50,000 in additional funding from the North Carolina Division of Public Health, Agreement Addendum, FY 25-26, 121 ARPA Temporary Savings Fund Program for Public Health Services in the Human Services Agency's Public Health Department, and 2) approve Special Revenue Ordinance Amendment # 97A.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This funding, provided through budget receipts transferred from the ARPA Temporary Savings fund and made available through the NCGA 2023 Appropriations Act, HB 259, provides a \$50,000 grant in each year of the 2023-2025 fiscal biennium to each local health department to support activities authorized under the General Aid-to-Counties Agreement Addendum including the delivery of the 10 Essential Public Health Services per GS § 130A-1.1.1, the core functions of public health (Assessment, Policy Development, Assurance), and the specific health needs or health status indicators selected by each local health department.

Per HB 259, Section 4.7.(i), "The funds appropriated from the State Fiscal Recovery Fund in this act and in prior enactments of the General Assembly shall not revert at the end of each fiscal year of the 2023-2025 fiscal biennium but shall remain available to expend and appropriate until the date set by applicable federal law or guidance."

This Agreement Addendum for Activity 121 further enhances the ability of local health departments to deliver the essential services and core functions of public health to address the specific health needs or health status indicators selected by the local health department.

The North Carolina General Statute § 130A-1.1(b) states: a local health department shall ensure that the following 10 Essential Public Health Services are available and accessible to the population in each county served by the local health department:

Assessment:

1. Monitor health status to identify community health problems.
2. Diagnose and investigate health problems and health hazards in the community.

Policy Development:

3. Inform, educate, and empower people about health issues.
4. Mobilize community partnerships to identify and solve health problems.
5. Develop policies and plans that support individual and community health efforts.

Assurance:

6. Enforce laws and regulations that protect health and ensure safety.
7. Link people to needed personal health services and assure the provision of health care when otherwise unavailable.
8. Assure a competent public health and personal health care workforce.
9. Evaluate effectiveness, accessibility, and quality of personal and population-based health services.
10. Research for new insights and innovative solutions to health problems.

FINANCIAL IMPACT:

Federal grant funding in the amount of \$50,000 is awarded through the North Carolina Division of Public Health Agreement Addendum, FY 25-26, 121 ARPA Temporary Savings Funds for Public Health Services. No County match is required.

Division of Public Health

Agreement Addendum

FY 25-26

Page 1 of 5

Union County Consolidated Human Services
Agency, Public Health Department

Local Health Department Legal Name

121 ARPA TSF Public Health Services

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 # ____

Local and Community Support /
Local Technical Assistance and Training

DPH Section / Branch Name

Susan H. Little, 919-215-4471
susan.little@dhhs.nc.gov

DPH Program Contact

(name, phone number, and email)

DPH Program Signature

(only required for a negotiable Agreement Addendum)

Date

I. **Background:**

This funding, provided through budget receipts transferred from the ARPA Temporary Savings fund and made available through the NCGA 2023 Appropriations Act, HB 259, provides a \$50,000 grant in each year of the 2023-2025 fiscal biennium to each local health department to support activities authorized under the General Aid-to-Counties Agreement Addendum including the delivery of the 10 Essential Public Health Services per GS § 130A-1.1.¹, the core functions of public health (Assessment, Policy Development, Assurance), and the specific health needs or health status indicators selected by each local health department.

Per HB 259, Section 4.7.(i), “The funds appropriated from the State Fiscal Recovery Fund in this act and in prior enactments of the General Assembly shall not revert at the end of each fiscal year of the 2023-2025 fiscal biennium but shall remain available to expend and appropriate until the date set by applicable federal law or guidance.”

II. **Purpose:**

This Agreement Addendum for Activity 121 further enhances the ability of local health departments to deliver the essential services and core functions of public health to address the specific health needs or health status indicators selected by the local health department.

¹ https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/ByArticle/Chapter_130A/Article_1.pdf

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

Date

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

Signature on this page signifies you have read and accepted all pages of this document.

Template rev. June 202 **230**

The North Carolina General Statute § 130A-1.1(b) states: a local health department shall ensure that the following **10 Essential Public Health Services** are available and accessible to the population in each county served by the local health department:

Assessment

1. Monitor health status to identify community health problems.
2. Diagnose and investigate health problems and health hazards in the community.

Policy Development

3. Inform, educate, and empower people about health issues.
4. Mobilize community partnerships to identify and solve health problems.
5. Develop policies and plans that support individual and community health efforts.

Assurance

6. Enforce laws and regulations that protect health and ensure safety.
7. Link people to needed personal health services and assure the provision of health care when otherwise unavailable.
8. Assure a competent public health and personal health care workforce.
9. Evaluate effectiveness, accessibility, and quality of personal and population-based health services.
10. Research for new insights and innovative solutions to health problems.

III. Scope of Work and Deliverables:

These funds may be used for any public health program or purpose, any locally identified need or current health status indicator, and to support the delivery of the core functions of public health and 10 Essential Public Health Services. The Local Health Department must report at the end of the fiscal year how the funds were spent related to the 10 Essential Public Health Services and core public health functions to address priority health needs or health status indicators selected by each local health department. Use of these funds may NOT supplant current state, federal or local funding.

To qualify for these funds, the Local Health Department must have a Permanent or Interim Health Director per NC GS § 130A-40. In addition, if that Health Director has never served in that role in North Carolina previously, that Health Director must participate in the *Orientation for New Local Health Directors* coordinated by the North Carolina Association of Local Health Directors. Additionally, the Local Health Department must be currently accredited by the North Carolina Local Health Department Accreditation Board.

IV. Performance Measures / Reporting Requirements:

1. Performance Measures

- a. **Measure #1:** The LHD shall invest this funding in specific health needs or health indicators including but not limited to the 10 Essential Public Health Services or core public health functions.
- b. **Measure #2:** The LHD shall identify the specific health needs or health status indicators selected for prioritization under this funding.
- c. **Measure #3:** The LHD shall identify the impact funding will have/had on the identified health needs or health status indicators selected for prioritization.

2. Reporting Requirements

By June 30, 2026, the LHD shall complete the following reports via the Smartsheet dashboard.²

² <https://app.smartsheet.com/b/publish?EQBCT=82018408e7b44ef9b44e113b6e536ffb>

- a. **Expenditures by Type Report:** LHD will provide funding expenditures by type for the annual reporting period.
 1. Personnel (Salaries, Fringe, Benefits, etc. Do not include contracted staff)
 2. Training and Education
 3. Travel and Mileage
 4. Medical Supplies
 5. Office/Administrative Supplies
 6. Contracted Services (included contracted staff)
 7. Other administrative costs (specify)
 8. Other (specify)

- b. **Prioritized Health Needs or Indicators and Statement of Impact Reports:** LHD will select one or more of the following health needs or indicators prioritized for the annual reporting period:
 1. Environmental Health
 2. Communicable Disease
 3. Maternal Health
 4. Child Health
 5. Chronic Disease
 6. Injury Prevention
 7. Access to or Linkage to Care
 8. Mental Health
 9. Behavioral Health
 10. Other health needs or indicators

Statement of Impact: LHD will provide a statement that demonstrates what impact these funds had on prioritized health needs or indicators.

3. **Reporting Required Subcontract Information**

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

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

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

programmatic responsibilities outlined in the executed AA. (Subrecipients are also referred to as Subgrantees in NCAC.)

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

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

V. Performance Monitoring and Quality Assurance:

The LTAT Branch will monitor performance by reviewing the annual Expenditures by Type Report, the Prioritized Health Needs or Indicators and Statement of Impact Reports. These financial and performance reports are provided by the LHD via the Smartsheet dashboard.

If the LHD seeks assistance in clarifying any part of this Agreement Addendum's requirements, LTAT Branch staff shall provide technical assistance upon request. If additional information is required, a phone conference will be conducted.

VI. Funding Guidelines or Restrictions:

1. **Federal Funding Requirements:** where federal grant dollars received by the Division of Public Health (DPH) are passed through to the Local Health Department (LHD) for all or any part of this Agreement Addendum (AA).

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

“I certify to the best of my knowledge and belief that the information provided herein is true, complete, and accurate. I am aware that the provision of false, fictitious, or fraudulent

information, or the omission of any material fact, may subject me to criminal, civil, or administrative consequences including, but not limited to violations of U.S. Code Title 18, Sections 2, 1001, 1343 and Title 31, Sections 3729-3730 and 3801-3812.”

2. The Local Health Department is not required to seek prior approval to use the funds. The funds shall be used for the delivery of the 10 Essential Public Health Services per GS § 130A-1.1.³, the core functions of public health (Assessment, Policy Development, Assurance), or the specific health needs or health status indicators selected by each Local Health Department.

³ https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/ByArticle/Chapter_130A/Article_1.pdf

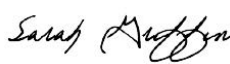
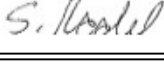
DPH-Aid-To-Counties

For Fiscal Year: 25/26

Budgetary Estimate Number : 0

Activity 121	AA	131204 2BTS190 2000400000	Total Allocated	Proposed Total	New Total
Service Period		07/01-05/31			
Payment Period		08/01-06/30			
01 Alamance		0	\$0.00	0	0
D1 Albemarle		0	\$0.00	0	0
02 Alexander	* 0	12,610	\$0.00	12,610	12,610
04 Anson	* 0	2,523	\$0.00	2,523	2,523
D2 Appalachian		0	\$0.00	0	0
07 Beaufort		0	\$0.00	0	0
09 Bladen	* 0	91,250	\$0.00	91,250	91,250
10 Brunswick	* 0	7,884	\$0.00	7,884	7,884
11 Buncombe		0	\$0.00	0	0
12 Burke		0	\$0.00	0	0
13 Cabarrus		0	\$0.00	0	0
14 Caldwell	* 0	37,692	\$0.00	37,692	37,692
16 Carteret		0	\$0.00	0	0
17 Caswell	* 0	86,623	\$0.00	86,623	86,623
18 Catawba		0	\$0.00	0	0
19 Chatham	* 0	91,578	\$0.00	91,578	91,578
20 Cherokee		0	\$0.00	0	0
22 Clay		0	\$0.00	0	0
23 Cleveland		0	\$0.00	0	0
24 Columbus	* 0	8,845	\$0.00	8,845	8,845
25 Craven		0	\$0.00	0	0
26 Cumberland		0	\$0.00	0	0
28 Dare		0	\$0.00	0	0
29 Davidson		0	\$0.00	0	0
30 Davie		0	\$0.00	0	0
31 Duplin		0	\$0.00	0	0
32 Durham		0	\$0.00	0	0
33 Edgecombe	* 0	5,919	\$0.00	5,919	5,919
D7 Foothills		0	\$0.00	0	0
34 Forsyth		0	\$0.00	0	0
35 Franklin		0	\$0.00	0	0
36 Gaston	* 0	100,000	\$0.00	100,000	100,000
38 Graham		0	\$0.00	0	0
D3 Gran-Vance		0	\$0.00	0	0
40 Greene	* 0	625	\$0.00	625	625
41 Guilford		0	\$0.00	0	0
42 Halifax		0	\$0.00	0	0
43 Harnett		0	\$0.00	0	0
44 Haywood	* 0	42,875	\$0.00	42,875	42,875
45 Henderson		0	\$0.00	0	0
47 Hoke		0	\$0.00	0	0
48 Hyde		0	\$0.00	0	0
49 Iredell	* 0	28,488	\$0.00	28,488	28,488
50 Jackson		0	\$0.00	0	0

51 Johnston		0	\$0.00	0	0
52 Jones		0	\$0.00	0	0
53 Lee	* 0	48,077	\$0.00	48,077	48,077
54 Lenoir		0	\$0.00	0	0
55 Lincoln	* 0	65,176	\$0.00	65,176	65,176
56 Macon	* 0	77,595	\$0.00	77,595	77,595
57 Madison		0	\$0.00	0	0
D4 M-T-W	* 0	1,655	\$0.00	1,655	1,655
60 Mecklenburg		0	\$0.00	0	0
62 Montgomery		0	\$0.00	0	0
63 Moore		0	\$0.00	0	0
64 Nash	* 0	99,460	\$0.00	99,460	99,460
65 New Hanover	* 0	36,637	\$0.00	36,637	36,637
66 Northampton	* 0	1,694	\$0.00	1,694	1,694
67 Onslow	* 0	3,125	\$0.00	3,125	3,125
68 Orange		0	\$0.00	0	0
69 Pamlico	* 0	23,640	\$0.00	23,640	23,640
71 Pender		0	\$0.00	0	0
73 Person		0	\$0.00	0	0
74 Pitt		0	\$0.00	0	0
75 Polk	* 0	60,036	\$0.00	60,036	60,036
76 Randolph		0	\$0.00	0	0
77 Richmond	* 0	16,664	\$0.00	16,664	16,664
78 Robeson	* 0	31,251	\$0.00	31,251	31,251
79 Rockingham	* 0	40,177	\$0.00	40,177	40,177
80 Rowan	* 0	6,403	\$0.00	6,403	6,403
82 Sampson	* 0	11,838	\$0.00	11,838	11,838
83 Scotland	* 0	98,977	\$0.00	98,977	98,977
84 Stanly	* 0	20,200	\$0.00	20,200	20,200
85 Stokes		0	\$0.00	0	0
86 Surry		0	\$0.00	0	0
87 Swain		0	\$0.00	0	0
D6 Toe River		0	\$0.00	0	0
88 Transylvania	* 0	17,919	\$0.00	17,919	17,919
90 Union	* 0	76,541	\$0.00	76,541	76,541
92 Wake		0	\$0.00	0	0
93 Warren	* 0	39,421	\$0.00	39,421	39,421
96 Wayne	* 0	25,723	\$0.00	25,723	25,723
97 Wilkes		0	\$0.00	0	0
98 Wilson		0	\$0.00	0	0
99 Yadkin	* 0	76,247	\$0.00	76,247	76,247
00 Yancey		0	\$0.00	0	0
Totals		1,395,368	0	1,395,368	1,395,368

Sign and Date - DPH Program Administrator  07/22/25 9:37 AM EDT	Sign and Date - DPH Section Chief  07/22/25 9:37 AM EDT
Sign and Date - DPH Budget Office – ATC Coordinator  7/22/2025	Sign and Date - DPH Budget Officer  7/25/25

S H 7/22/2025

Special Revenue Grant Project Ordinance 97A
Public Health Services Additional Funding-AA121 ARPA Temporary Savings Funding
Public Health Department, Human Services Agency

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 grant project ordinance is hereby adopted:

Section 1: This ordinance is to increase the current budget for Public Health Services. Union County has received \$100,000 of funds to date, \$50,000 on April 1, 2024 and \$50,000 on November 17, 2025. These funds may be used for the following categories of expenditures, to the extent authorized by state law.

1. Operating costs to support child health care service referral coordination and health care medical provider assistance in the child health clinic.

Section 2: The attached chart is incorporated herein showing appropriations to date, additions as of this special revenue ordinance, and the total appropriation.

Section 3: The following amounts are appropriated for the projects and authorized for expenditures:

Project Uses		Appropriation Public Health Department
Medical Services		\$50,000
Total		\$50,000

Section 4: The following revenues are anticipated to be available to complete the project:
AA121 ARPA Temporary Savings Funding: \$50,000

Section 5: The Finance Officer is hereby directed to maintain sufficient specific detailed accounting records to satisfy the requirements of the grantor agency and the grant agreements, including payroll documentation and effort certifications, in accordance with 2 CFR 200.430 & 2 CFR 200.431.

Section 6: Copies of this grant project ordinance shall be furnished to the Budget Officer, the Finance Officer and to the Clerk to Board of County Commissioners.

Section 7: This grant project ordinance expires when AA121 ARPA Temporary Savings funds have been obligated and expended by the County, whichever occurs sooner.

Section 8: At the completion of this grant project ordinance the Finance Officer is hereby directed to close out AA121 ARPA Temporary Savings funds.

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
FISCAL YEAR FY 2025-2026

REQUESTED BY Traci Colley
DATE November 17, 2025

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
State Grant	50,000	50,000	100,000
	50,000	50,000	100,000

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Operating Expenses	50,000	50,000	100,000
	50,000	50,000	100,000

EXPLANATION:

DATE: 11/17/2025

APPROVED BY:

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

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
30030501-4421 State Grant	50,000	50,000	100,000
	50,000	50,000	100,000

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
30030501-5383 Medical Services	50,000	50,000	100,000
	50,000	50,000	100,000

Prepared By JBH
Posted By _____
Date _____

Number SRO 97A



Union County, NC

Staff Report

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

File #: 25-688

Agenda Date: 11/17/2025

TITLE:

Grant Application - Dental Clinic

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

- 1) November 7, 2022, Regular Meeting, Agenda Item #22-751 - Approved Delta Dental Foundation grant application.
- 2) December 4, 2023, Regular Meeting, Agenda Item #23-823 - Approved Delta Dental Foundation grant application.
- 3) December 2, 2024, Regular Meeting, Agenda Item #24-815 - Approved Delta Dental Foundation grant application.

BACKGROUND:

The Delta Dental Foundation is accepting applications for grant funding up to \$5,000 to support community dental care for children through their Smiles for Kids Grants Program. The Public Health Dental Clinic requests approval to apply for these funds to support and expand our dental care services for children who have financial challenges receiving the necessary care. We anticipate 25-30 children can be served through this funding.

The County's Dental Clinic provides general dentistry services and education to residents who may have difficulty obtaining dental care due to financial needs or access to other providers. The clinic provides services for adults and children beginning at 1 year of age. The clinic accepts Medicaid, third-party insurance and private pay on a sliding fee scale based on income.

Oral diseases, which range from cavities and gum disease to oral cancer, cause pain and disability for many in our community. Establishing good oral health practices and seeking early dental care is an important component for overall health and is especially important for children to begin routine dental care early in their lives.

A new application is required to be submitted each year to be considered for grant funding.

FINANCIAL IMPACT:

Anticipated funding is \$5,000 with no County match requested or required.



Union County, NC

Staff Report

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

File #: 25-689

Agenda Date: 11/17/2025

TITLE:

Budget Amendment - Additional Funding for Conversion to Electronic Test Ordering and Results System

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Recognize, receive, and appropriate \$6,000 in additional funding from the North Carolina Division of Public Health Agreement Addendum FY25-26, 510 General Communicable Disease Control, Revision #1 and 2) approve Budget Amendment #10.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

To help better control, detect, and monitor communicable diseases, the North Carolina State Laboratory of Public Health (NCSLPH) is implementing a new system: the Electronic Test Ordering and Results (ETOR) system. Currently, local health departments send thousands of paper test requisition forms to the NCSLPH each week, which results in thousands of paper results being sent back. This manual process is time consuming and inefficient for everyone. To significantly reduce paper and streamline operations, the NCSLPH is phasing in the implementation of the ETOR system. The local health departments' part in the onboarding process will be during the Bidirectional Interface Project. Local health departments will be phased into this process and notified of their timeline by the project manager at the NCSLPH. This project will connect each local health departments' Electronic Health Record (EHR) system directly with the NCSLPH Laboratory Information Management System (LIMS) through the North Carolina Health Information Exchange (NCHIEA). This new bidirectional interface will allow every local health department to place lab test orders with NCSLPH electronically (i.e., paperless) and to receive lab test results automatically back into the local health department's EHR system via the NCHIEA. This change will make test ordering and receipt of results much more efficient, benefiting all local health departments across North Carolina.

FINANCIAL IMPACT:

The County is awarded \$6,000 from the North Carolina Division of Public Health through May 31, 2026. No County match is required.

Division of Public Health

Agreement Addendum

FY 25-26

Page 1 of 3

Union County Consolidated Human Services
Agency, Public Health Department

Local Health Department Legal Name

510 General Communicable Disease Control

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 # 1

Epidemiology / Communicable Disease Branch

DPH Section / Branch Name

Vanessa Gailor 919-546-1658

vanessa.gailor@dhhs.nc.gov

DPH Program Contact

(name, phone number, and email)

DPH Program Signature

(only required for a negotiable Agreement Addendum)

Date

I. **Background:**

As of August 1, 2025, this Agreement Addendum Revision #1 adds the following four paragraphs:

To help better control, detect, and monitor communicable diseases, the North Carolina State Laboratory of Public Health (NCSLPH) is implementing a new system: the Electronic Test Ordering and Results (ETOR) system.

Currently, local health departments send thousands of paper test requisition forms to the NCSLPH each week, which results in thousands of paper results being sent back. This manual process is time-consuming and inefficient for everyone. To significantly reduce paper and streamline operations, the NCSLPH is phasing in the implementation of the ETOR system.

The local health departments' part in the onboarding process will be during the Bidirectional Interface Project. Local health departments will be phased into this process and notified of their timeline by the project manager at the NCSLPH. This project will connect each local health departments' Electronic Health Record (EHR) system directly with the NCSLPH Laboratory Information Management System (LIMS) through the North Carolina Health Information Exchange (NCHIEA).

This new bidirectional interface will allow every local health department to place lab test orders with NCSLPH electronically (i.e., paperless) and to receive lab test results automatically back into the local health department's EHR system via the NCHIEA. This change will make test ordering and receipt of results much more efficient, benefiting all local health departments across North Carolina.

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:

Signature on this page signifies you have read and accepted all pages of this document.

Template rev. Dec2024

242

II. **Purpose:**

This Agreement Addendum Revision #1 provides additional funding to enable the Local Health Department (LHD) to implement the Electronic Test Ordering and Results (ETOR) system by participating in the Bidirectional Interface Project.

III. **Scope of Work and Deliverables:**

As of August 1, 2025, this Agreement Addendum Revision #1 adds Paragraph 9, as follows:

9. Implement the Electronic Test Ordering and Results (ETOR) system for NCSLPH test orders and results viewing per the onboarding schedule to be sent by the NCSLPH to each local health department. The ETOR system enables local health departments to place electronic laboratory test orders via their Electronic Health Record and Electronic Medical Record (EHR) vendors' systems and view laboratory test results via their EHR vendors' systems. This implementation includes:
 - a. Attending weekly ETOR system status meetings held by NCSLPH staff, during the LHD's Onboarding Phase. Each LHD's Onboarding Phase will run between one to four weeks. Each status meeting will include a review and distribution of the program schedule. The project is planned and tracked by the ETOR Project Manager at the NCSLPH through planning software; NCSLPH will create additional reports from this software to share with the LHD at each meeting.
 - b. Working with its EHR vendor to finalize the EHR onboarding document for ETOR within the LHD, no later than the date indicated on the program schedule.
 - c. Participating in ETOR system interface/integration design meetings as needed during the ETOR system requirements, design, and testing phases.
 - d. Participating in User Acceptance Testing (UAT) of the integrated ETOR system, which includes executing UAT Test Cases.
 - e. Participating in Operational Readiness Testing (ORT) of the integrated ETOR system
 - f. Participating in the phased training for ETOR within the LHD, as scheduled. One set of training sessions will occur prior to the UAT cycles; and a final set will be provided prior to operational go-live.

IV. **Performance Measures / Reporting Requirements:**

As of August 1, 2025, this Agreement Addendum Revision #1 adds Paragraphs 9 and 10, as follows:

9. **Performance Measure #8:** During the Onboarding Phase for the ETOR system, the local health department will submit weekly progress reports via Jira, a software application that will be used for this reporting phase. (Before this phase begins, the ETOR Project Manager will provide training on Jira.) The ETOR Project Manager will contact each local health department to confirm the start date of the onboarding phase.

Reporting Requirements: Provide weekly progress reports to the ETOR Project Manager via Jira during the Onboarding Phase.

10. **Performance Measure #9:** During the UAT Testing Phase, local health departments will execute UAT Test Cases per the program schedule, attend weekly review meetings and provide weekly reporting. The program schedule is distributed weekly and is reviewed during each weekly ETOR system status meeting.

Reporting Requirements: Provide weekly reporting during the UAT Testing Phase to the NCSLPH project manager and attend weekly meetings.

V. Performance Monitoring and Quality Assurance:

As of August 1, 2025, this Agreement Addendum Revision #1 adds Paragraph 4, as follows:

4. Each week, the NCSLPH staff will review the LHD's Onboarding Phase weekly progress reports and provide feedback, as needed. The NCSLPH staff will also provide feedback and technical assistance, as needed, to the LHD about the LHD's UAT and Operational Readiness Test (ORT) test case development and execution.

VI. Funding Guidelines or Restrictions:

No change.

FY26 - FAS	Activity Nbr + Name:	510	General Communicable Disease Control	
federal award supplement	FAS Number + Reason:	1	This FAS is accompanying an AA+BE or an AA Revision+BE Revision.	
	Assistance Listing Nbr + Name:	93.323	Epidemiology and Laboratory Capacity for Infectious Diseases (ELC)	
Is award R&D?:	FAIN:	NO	NU50CK000530	IDC rate: n/a Fed awd total amt: \$ 5,269,422
Fed award project description:		CK19-1904 Epidemiology and Laboratory Capacity for Prevention and Control of Emerging Infectious Diseases (ELC)		
Fed awd date + awarding agency:		10-17-23 HHS, Centers for Disease Control and Prevention		

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	\$ 6,000	\$ 6,000	Jackson	X7YWWY6ZP574	\$ 6,000	\$ 6,000
Albemarle	WAAVS51PNMK3	\$ 6,000	\$ 6,000	Johnston	SYGAGEFDHYR7	\$ 6,000	\$ 6,000
Alexander	XVEEJSNY7UX9	\$ 6,000	\$ 6,000	Jones	HE3NNNUE27M7	\$ 6,000	\$ 6,000
Anson	PK8UYTSNJCC3	\$ 6,000	\$ 6,000	Lee	F6A8UC99JWJ5	\$ 6,000	\$ 6,000
Appalachian	CD7BFHB8W539	\$ 6,000	\$ 6,000	Lenoir	QKUFL37VPGH6	\$ 6,000	\$ 6,000
Beaufort	RN1SXF4LXN6	\$ 6,000	\$ 6,000	Lincoln	UGGQGS5KBJG5	\$ 6,000	\$ 6,000
Bladen	TLCTJWDJH1H9	\$ 6,000	\$ 6,000	Macon	LLPJBC6N2LL3	\$ 6,000	\$ 6,000
Brunswick	MJBMXLN9NJT5	\$ 6,000	\$ 6,000	Madison	YQ96F8BJYTJ9	\$ 6,000	\$ 6,000
Buncombe	W5TCDKMLHE69	\$ 6,000	\$ 6,000	MTW	ZKK5GNRNB5Y6	\$ 6,000	\$ 6,000
Burke	KVJHUFURQDM5	\$ 6,000	\$ 6,000	Mecklenburg	EZ15XL6BMM68	\$ 6,000	\$ 6,000
Cabarrus	RDXDNEJKJFU7	\$ 6,000	\$ 6,000	Montgomery	E78ZAJM3BFL3	\$ 6,000	\$ 6,000
Caldwell	HL4FGNJNGE97	\$ 6,000	\$ 6,000	Moore	HFNSK95FS7Z8	\$ 6,000	\$ 6,000
Carteret	UC6WJ2MQMJS8	\$ 6,000	\$ 6,000	Nash	NF58K566HQM7	\$ 6,000	\$ 6,000
Caswell	JDJ7Y7CGYC86	\$ 6,000	\$ 6,000	New Hanover	F7TLT2GMEJE1	\$ 6,000	\$ 6,000
Catawba	GYUNA9W1NFM1	\$ 6,000	\$ 6,000	Northampton	CRA2KCAL8BA4	\$ 6,000	\$ 6,000
Chatham	KE57QE2GV5F1	\$ 6,000	\$ 6,000	Onslow	EGE7NBXW5JS6	\$ 6,000	\$ 6,000
Cherokee	DCEGK6HA11M5	\$ 6,000	\$ 6,000	Orange	GFFMCW9XDA53	\$ 6,000	\$ 6,000
Clay	HYKLQVNWLXK7	\$ 6,000	\$ 6,000	Pamlico	FT59QFEAU344	\$ 6,000	\$ 6,000
Cleveland	UWMUYMPVL483	\$ 6,000	\$ 6,000	Pender	T11BE678U9P5	\$ 6,000	\$ 6,000
Columbus	V1UAJ4L87WQ7	\$ 6,000	\$ 6,000	Person	FQ8LFJGMABJ4	\$ 6,000	\$ 6,000
Craven	LTZ2U8LZQ214	\$ 6,000	\$ 6,000	Pitt	VZNPMLCFT5R6	\$ 6,000	\$ 6,000
Cumberland	HALND8WJ3GW4	\$ 6,000	\$ 6,000	Polk	QZ6BZPGLX4Y9	\$ 6,000	\$ 6,000
Dare	ELV6JGB11QK6	\$ 6,000	\$ 6,000	Randolph	T3BUM1CVS9N5	\$ 6,000	\$ 6,000
Davidson	C9P5MDJC7KY7	\$ 6,000	\$ 6,000	Richmond	Q63FZNTJM3M4	\$ 6,000	\$ 6,000
Davie	L8WBGLHZV239	\$ 6,000	\$ 6,000	Robeson	LKBEJQFLAAK5	\$ 6,000	\$ 6,000
Duplin	KZN4GK5262K3	\$ 6,000	\$ 6,000	Rockingham	KGCCCHJZZ43	\$ 6,000	\$ 6,000
Durham	LJ5BA6U2HLM7	\$ 6,000	\$ 6,000	Rowan	GCB7UCV96NW6	\$ 6,000	\$ 6,000
Edgecombe	MAN4LX44AD17	\$ 6,000	\$ 6,000	Sampson	WRT9CSK1KJY5	\$ 6,000	\$ 6,000
Foothills	NGTEF2MQ8LL4	\$ 6,000	\$ 6,000	Scotland	FNVTCUQGCHM5	\$ 6,000	\$ 6,000
Forsyth	V6BGVQ67YPY5	\$ 6,000	\$ 6,000	Stanly	U86MZUYPL7C5	\$ 6,000	\$ 6,000
Franklin	FFKTRQCNN143	\$ 6,000	\$ 6,000	Stokes	W41TRA3NUNS1	\$ 6,000	\$ 6,000
Gaston	QKY9R8A8D5J6	\$ 6,000	\$ 6,000	Surry	FMWCTM24C9J8	\$ 6,000	\$ 6,000
Graham	L8MAVKQJTYN7	\$ 6,000	\$ 6,000	Swain	TAE3M92L4QR4	\$ 6,000	\$ 6,000
Granv-Vance	MGQJKK22EJB3	\$ 6,000	\$ 6,000	Toe River	JUA6GAUQ9UM1	\$ 6,000	\$ 6,000
Greene	VCU5LD71N9U3	\$ 6,000	\$ 6,000	Transylvania	YLN4BFCJCP39	\$ 6,000	\$ 6,000
Guilford	YBEQWGFJPMJ3	\$ 6,000	\$ 6,000	Union	LHMKBD4AGRJ5	\$ 6,000	\$ 6,000
Halifax	MRL8MYNJ3Y5	\$ 6,000	\$ 6,000	Wake	FTJ2WJPLWMJ3	\$ 6,000	\$ 6,000
Harnett	JBDCD9V41BX7	\$ 6,000	\$ 6,000	Warren	TLNAU5CNHSU5	\$ 6,000	\$ 6,000
Haywood	DQHZEAV95G5	\$ 6,000	\$ 6,000	Wayne	DACFHCLQKMS1	\$ 6,000	\$ 6,000
Henderson	TG5AR81JLFQ5	\$ 6,000	\$ 6,000	Wilkes	M14KKHY2NNR3	\$ 6,000	\$ 6,000
Hoke	C1GWSADARX51	\$ 6,000	\$ 6,000	Wilson	ME2DJHMYWG55	\$ 6,000	\$ 6,000
Hyde	T2RSYN36NN64	\$ 6,000	\$ 6,000	Yadkin	PLCDT7JFA8B1	\$ 6,000	\$ 6,000
Iredell	XTNRLKJLA4S9	\$ 6,000	\$ 6,000	Yancey	L98MCUHKC2J8	\$ 6,000	\$ 6,000

Activity 510	AA	131303 2B0884A 20G0097001	Total Allocated	131304 2B14510 2000000000	Total Allocated	Proposed Total	New Total
Service Period		08/01-05/31		06/01-05/31			
Payment Period		09/01-06/30		07/01-06/30			
01 Alamance	* 1	6,000	\$0.00	0	\$3,708.00	6,000	9,708
D1 Albemarle	* 1	6,000	\$0.00	0	\$37,232.00	6,000	43,232
02 Alexander	* 1	6,000	\$0.00	0	\$10,112.00	6,000	16,112
04 Anson	* 1	6,000	\$0.00	0	\$5,876.00	6,000	11,876
D2 Appalachian	* 1	6,000	\$0.00	0	\$23,233.00	6,000	29,233
07 Beaufort	* 1	6,000	\$0.00	0	\$2,684.00	6,000	8,684
09 Bladen	* 1	6,000	\$0.00	0	\$2,147.00	6,000	8,147
10 Brunswick	* 1	6,000	\$0.00	0	\$13,292.00	6,000	19,292
11 Buncombe	* 1	6,000	\$0.00	0	\$7,807.00	6,000	13,807
12 Burke	* 1	6,000	\$0.00	0	\$1,610.00	6,000	7,610
13 Cabarrus	* 1	6,000	\$0.00	0	\$10,734.00	6,000	16,734
14 Caldwell	* 1	6,000	\$0.00	0	\$10,246.00	6,000	16,246
16 Carteret	* 1	6,000	\$0.00	0	\$1,756.00	6,000	7,756
17 Caswell	* 1	6,000	\$0.00	0	\$10,911.00	6,000	16,911
18 Catawba	* 1	6,000	\$0.00	0	\$8,197.00	6,000	14,197
19 Chatham	* 1	6,000	\$0.00	0	\$1,610.00	6,000	7,610
20 Cherokee	* 1	6,000	\$0.00	0	\$11,066.00	6,000	17,066
22 Clay	* 1	6,000	\$0.00	0	\$11,294.00	6,000	17,294
23 Cleveland	* 1	6,000	\$0.00	0	\$5,465.00	6,000	11,465
24 Columbus	* 1	6,000	\$0.00	0	\$3,415.00	6,000	9,415
25 Craven	* 1	6,000	\$0.00	0	\$6,343.00	6,000	12,343
26 Cumberland	* 1	6,000	\$0.00	0	\$25,762.00	6,000	31,762
28 Dare	* 1	6,000	\$0.00	0	\$927.00	6,000	6,927
29 Davidson	* 1	6,000	\$0.00	0	\$3,806.00	6,000	9,806
30 Davie	* 1	6,000	\$0.00	0	\$927.00	6,000	6,927
31 Duplin	* 1	6,000	\$0.00	0	\$4,440.00	6,000	10,440
32 Durham	* 1	6,000	\$0.00	0	\$21,517.00	6,000	27,517
33 Edgecombe	* 1	6,000	\$0.00	0	\$7,367.00	6,000	13,367
D7 Foothills	* 1	6,000	\$0.00	0	\$14,060.00	6,000	20,060
34 Forsyth	* 1	6,000	\$0.00	0	\$17,760.00	6,000	23,760
35 Franklin	* 1	6,000	\$0.00	0	\$4,342.00	6,000	10,342
36 Gaston	* 1	6,000	\$0.00	0	\$28,152.00	6,000	34,152
38 Graham	* 1	6,000	\$0.00	0	\$11,336.00	6,000	17,336
D3 Gran-Vance	* 1	6,000	\$0.00	0	\$4,147.00	6,000	10,147
40 Greene	* 1	6,000	\$0.00	0	\$10,623.00	6,000	16,623
41 Guilford	* 1	6,000	\$0.00	0	\$15,955.00	6,000	21,955
42 Halifax	* 1	6,000	\$0.00	0	\$2,293.00	6,000	8,293
43 Harnett	* 1	6,000	\$0.00	0	\$4,001.00	6,000	10,001
44 Haywood	* 1	6,000	\$0.00	0	\$11,423.00	6,000	17,423
45 Henderson	* 1	6,000	\$0.00	0	\$2,586.00	6,000	8,586
47 Hoke	* 1	6,000	\$0.00	0	\$3,652.00	6,000	9,652
48 Hyde	* 1	6,000	\$0.00	0	\$11,044.00	6,000	17,044
49 Iredell	* 1	6,000	\$0.00	0	\$5,757.00	6,000	11,757
50 Jackson	* 1	6,000	\$0.00	0	\$10,514.00	6,000	16,514

51 Johnston	*	1	6,000	\$0.00	0	\$3,757.00	6,000	9,757
52 Jones	*	1	6,000	\$0.00	0	\$9,778.00	6,000	15,778
53 Lee	*	1	6,000	\$0.00	0	\$3,464.00	6,000	9,464
54 Lenoir	*	1	6,000	\$0.00	0	\$7,270.00	6,000	13,270
55 Lincoln	*	1	6,000	\$0.00	0	\$12,488.00	6,000	18,488
56 Macon	*	1	6,000	\$0.00	0	\$10,678.00	6,000	16,678
57 Madison	*	1	6,000	\$0.00	0	\$10,783.00	6,000	16,783
D4 M-T-W	*	1	6,000	\$0.00	0	\$2,488.00	6,000	8,488
60 Mecklenburg	*	1	6,000	\$0.00	0	\$49,328.00	6,000	55,328
62 Montgomery	*	1	6,000	\$0.00	0	\$11,139.00	6,000	17,139
63 Moore	*	1	6,000	\$0.00	0	\$2,732.00	6,000	8,732
64 Nash	*	1	6,000	\$0.00	0	\$4,196.00	6,000	10,196
65 New Hanover	*	1	6,000	\$0.00	0	\$7,904.00	6,000	13,904
66 Northampton	*	1	6,000	\$0.00	0	\$2,440.00	6,000	8,440
67 Onslow	*	1	6,000	\$0.00	0	\$11,954.00	6,000	17,954
68 Orange	*	1	6,000	\$0.00	0	\$3,708.00	6,000	9,708
69 Pamlico	*	1	6,000	\$0.00	0	\$10,077.00	6,000	16,077
71 Pender	*	1	6,000	\$0.00	0	\$9,999.00	6,000	15,999
73 Person	*	1	6,000	\$0.00	0	\$4,398.00	6,000	10,398
74 Pitt	*	1	6,000	\$0.00	0	\$71,006.00	6,000	77,006
75 Polk	*	1	6,000	\$0.00	0	\$7,029.00	6,000	13,029
76 Randolph	*	1	6,000	\$0.00	0	\$4,928.00	6,000	10,928
77 Richmond	*	1	6,000	\$0.00	0	\$2,000.00	6,000	8,000
78 Robeson	*	1	6,000	\$0.00	0	\$5,172.00	6,000	11,172
79 Rockingham	*	1	6,000	\$0.00	0	\$4,098.00	6,000	10,098
80 Rowan	*	1	6,000	\$0.00	0	\$11,271.00	6,000	17,271
82 Sampson	*	1	6,000	\$0.00	0	\$3,659.00	6,000	9,659
83 Scotland	*	1	6,000	\$0.00	0	\$7,855.00	6,000	13,855
84 Stanly	*	1	6,000	\$0.00	0	\$2,732.00	6,000	8,732
85 Stokes	*	1	6,000	\$0.00	0	\$11,000.00	6,000	17,000
86 Surry	*	1	6,000	\$0.00	0	\$2,391.00	6,000	8,391
87 Swain	*	1	6,000	\$0.00	0	\$10,535.00	6,000	16,535
D6 Toe River	*	1	6,000	\$0.00	0	\$21,132.00	6,000	27,132
88 Transylvania	*	1	6,000	\$0.00	0	\$10,656.00	6,000	16,656
90 Union	*	1	6,000	\$0.00	0	\$7,416.00	6,000	13,416
92 Wake	*	1	6,000	\$0.00	0	\$52,158.00	6,000	58,158
93 Warren	*	1	6,000	\$0.00	0	\$9,592.00	6,000	15,592
96 Wayne	*	1	6,000	\$0.00	0	\$8,587.00	6,000	14,587
97 Wilkes	*	1	6,000	\$0.00	0	\$2,293.00	6,000	8,293
98 Wilson	*	1	6,000	\$0.00	0	\$8,294.00	6,000	14,294
99 Yadkin	*	1	6,000	\$0.00	0	\$11,307.00	6,000	17,307
00 Yancey	*	1	6,000	\$0.00	0	\$12,140.00	6,000	18,140
Totals			516,000	0	0	876,961	516,000	1,392,961

Sign and Date - DPH Program Administrator <i>Christopher M Kippes</i> 07/24/25	Sign and Date - DPH Section Chief <i>Mac Kemer</i> 07/24/25
Sign and Date - DPH Budget Office – ATC Coordinator <i>Sarah Kippes</i> 7/24/2025	Sign and Date - DPH Budget Officer <i>S. Kippes</i> 7/25/25

BUDGET AMENDMENT

BUDGET	<u>Public Health - Adult</u>	REQUESTED BY	<u>Traci Colley</u>
FISCAL YEAR	<u>FY 2026</u>	DATE	<u>November 17, 2025</u>

INCREASE

<u>Description</u>	
Printing & Office Supplies	<u>2,467.69</u>
Education Expenses	<u>300.00</u>
Miscellaneous*	<u>3,232.31</u>

DECREASE

<u>Description</u>	
Fed Grant - DPH Summary	<u>6,000</u>

Explanation: Additional Funding for Conversion to Electronic Test Ordering and Results System. Recognize, receive, and appropriate \$6,000 in additional funding from the NC Division of Public Health Agreement Addendum FY25-26, 510 General Communicable Disease Control, Revision #1.

DATE 11/17/2025

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>
10130513-5260-11440	Printing & Office Supplies	<u>2,467.69</u>
10130513-5313-11440	Education Expenses	<u>300.00</u>
10130513-5299-11440	Miscellaneous*	<u>3,232.31</u>

CREDIT

<u>Code</u>	<u>Account</u>	
10130513-4320-11440	Fed Grant - DPH Summary	<u>6,000</u>

*5299 not showing available in that project string

Total 6,000

Total 6,000

Prepared By MEG
Posted By _____
Date _____

Number 10



Union County, NC

Staff Report

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

File #: 25-707

Agenda Date: 11/17/2025

TITLE:

Grant Application -Target Circle Community Giving

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None

BACKGROUND:

Union County has been selected to receive funding through Target's Target Circle Community Giving program, in which Target Circle members vote and direct funds toward programs in their communities. Once each voting period concludes, Target allocates grants based on the percentage of votes each organization receives.

Union County's Senior Nutrition Program has been designated to receive \$3,525.39 in unrestricted funding through this initiative. These funds will be used to support general program operations and enhance services for older adults across Union County. The funding will be used for program needs such as shelf-stable meals, computer equipment for staff, or craft and activity supplies for congregate meal site participants.

FINANCIAL IMPACT:

\$3,525.39 will be awarded with no required match.



Union County, NC

Staff Report

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

File #: 25-696

Agenda Date: 11/17/2025

TITLE:

Resolution - Parks & Recreation Bobcat Exchange

INFORMATION CONTACT:

Jim Chaffin, Parks & Recreation, Director, 704-283-3881

ACTION REQUESTED:

Adopt a resolution authorizing the exchange of personal property.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County currently owns a Bobcat S250 skid steer loader purchased in 2005, which is actively used by the Parks & Recreation Department. Due to the machine's age and the rising costs associated with its maintenance, the department is requesting to replace the existing Bobcat with a new 2025 Model S650 T4 skid steer loader.

As part of this replacement process, Parks & Recreation is seeking approval to exchange the current Bobcat S250 pursuant to N.C.G.S. 160A-271. The County will receive the current fair market value of the Bobcat, less the cost of an outstanding work order, as trade-in value for the new Bobcat. This exchange will reduce the overall purchase cost charged to the department's budget. Details regarding the purchase price, trade-in value, and the final net price are included in the attached resolution.

FINANCIAL IMPACT:

The total cost for the new 2025 Model S650 T4 Skid Steer Loader, after applying the trade-in allowance for the existing Bobcat S250, will be \$48,737.44. Funds for this purchase are appropriately budgeted within the Parks & Recreation Department's current budget.

RESOLUTION AUTHORIZING EXCHANGE OF A CERTAIN UNION COUNTY SKID
STEER FOR A NEW SKID STEER

THAT WHEREAS, Union County is the owner of one Bobcat S250, serial number 526014782, originally purchased in 2005 (the “Union Bobcat”); and

WHEREAS, Union County desires to exchange the Union Bobcat for a new skid steer from Bobcat of Monroe; and

WHEREAS, pursuant to North Carolina General Statutes § 160A-271, Union County is authorized to exchange any personal property belonging to the County if the County receives full and fair consideration in exchange for its property; and

WHEREAS, the final trade-in value of \$11,377.20 offered for the Union Bobcat by Bobcat of Monroe is equal to the current fair market value of the Union Bobcat, less the cost of an outstanding work order on the Union Bobcat; and

WHEREAS, Union County will pay to Bobcat of Monroe, as additional consideration in exchange for a new S650 T4 Bobcat Skid Steer Loader (the “New Bobcat”), an amount not to exceed \$48,737.44.

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

The County Manager or his designee is authorized to exchange the Union Bobcat with Bobcat of Monroe for the New Bobcat in accordance with G.S. § 160A-271, and to execute such documents of conveyance as may be necessary to transfer ownership of the Union Bobcat and accept ownership of the New Bobcat.

This the 17th day of November, 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 #: 25-697

Agenda Date: 11/17/2025

TITLE:

Purchase - Replacement/Expansion Vehicles

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Fleet requests the approval to purchase sixteen (16) replacement and/or expansion vehicles. Seven (7) vehicles are replacements for existing assets that have met their use in life in accordance with the vehicle replacement policy and were approved for replacement in the FY26 budget. Nine (9) vehicles are expansion vehicles which were approved in the FY26 budget. A summary of the replacement and expansion vehicles is as follows:

Replacements

- (1) 2026 Ford Explorer 4WD - Replaces 41-08, UC Water, \$39,344.16
- (1) 2026 Ford F250 Crew Cab 4WD - Replaces 55-14, Fire Services \$50,230.18
- (1) 2026 Ford F150 Super Cab 4WD - Replaces 33-13, \$42,142.78
- (1) 2026 Ford F150 Super Cab 4WD - Replaces 70-16, \$42,142.78
- (1) 2026 Ford F150 Super Cab 4WD - Replaces 16-16, \$42,142.78
- (1) 2026 Ford F150 Super Cab 4WD - Replaces 34-13, \$42,142.78
- (1) 2026 Ford F150 Super Cab 4WD - Replaces 56-14, \$42,142.78

Expansions

- (1) 2026 Ford Explorer 4WD - Expansion, Assessment, \$39,344.16
- (1) 2026 Ford F250 Crew Cab 4WD - Expansion, Solid Waste, \$50,093.88
- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01
- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01
- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01

- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01
- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01
- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01
- (1) 2026 Ford F150Crew Cab 4WD - Expansion, UC Water, \$43,870.01

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 vehicles will be made using North Carolina State Term Contract 2510A as quoted by Deacon Jones Ford of Clinton. The Procurement Department has vetted this contract and purchase amount.

FINANCIAL IMPACT:

The anticipated cost for the vehicles is \$696,816.35 and is budgeted accordingly for FY26.

10/15/25
Reg 2106

74347

Line #1

ASSD EXP.

10131200



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton

2026 Ford Explorer Active Trim

North Carolina Statewide Term Contract 2510A

SUV's and Crossovers

Contract Term Dates: Feb 01, 2024 - Jan 31, 2029

County Of Union

Drivetrain Configurations

2.3L EcoBoost	☐	K7D-200A	2026 Ford Explorer, Active Trim, RWD, 2.3L Ecoboost	\$ 36,926.66
	☒	K8D-200A	2026 Ford Explorer, Active Trim, 4WD, 2.3L Ecoboost	\$ 38,784.16

2510A Base Vehicle Configuration

Base Body Configuration

119	119" Wheel Base	Base
-----	-----------------	------

Base Powertrain Configuration

99H	2.3L EcoBoost I-4 Engine RWD (99B-3.3L V-6 4WD)	Base
44T	10 Speed Automatic Transmission	Base

Base Interior Configuration

YZ	Oxford White	Base
8	Cloth Seats	Base
H	Space Gray	Base

Base Package / Options

	P255/65R-18" All Season BSW Tire	Base
	18" Painted Aluminum Wheels	Base
B4A	Fleet Invoice Structure	Base
153	Front License Plate Bracket	Base
	Second Row Captain's Chairs Bench with E-Z Entry1 and Armrests	

Code	Additional Factory Options	MSRP	6% Disc
☒	153 Front License Plate Bracket	N/C	N/C
☐	68A Active Comfort Package- see note	\$ 3,145	\$ 2,956.30
☐	17U Second Row Seating, 35/30/35 Bench with E-Z Entry Armrests	N/C	N/C
☐	16B Floor Liners, Front and Second Rows- with carpet mats	\$ 200	\$ 188.00
☐	16A Floor Liners, Front and Second Rows- without carpet mats	\$ 160	\$ 150.40
☐	41H Engine Block Heater	\$ 190	\$ 178.60
☐	61E SecuriCode Keyless Entry Keypad	\$ 455	\$ 427.70
☐	942 Daytime Running Lights	\$ 45	\$ 42.30
☐	76U 18" Spare Tire and Jack Kit. Deletes Tire Inflator Kit	\$ 376	\$ 353.44

Standard Colors:			Quantity
☐	UM	Agate Black	
☒	YZ	Oxford White	1.00
☐	M7	Carbonized Grey	
☐	A3	Space White Metallic	
☐	T9	Marsh Gray	

Enter Quantity Here

Emergency Equipment/Lighting Upfit		
☒		2 EXTRA KEY FOBS..\$280 EACH
☐		
☐		
☐		

Total Price Per Vehicle:	\$ 39,344.16
Number Units This Spec:	1.00
Total this Order:	\$ 39,344.16

Notes & Instructions:

Agency Information:
Agency Name: <u>County Of Union</u>
Contact: <u>Mandy Joyner</u>
Position: <u>Office Supervisor</u>
Address 1: <u>610 Patton Ave</u>
Address 2: <u> </u>
City, State, Zip: <u>Monroe NC 28110</u>
Office Phone: <u>704-283-3893</u>
Cell Phone: <u> </u>
Email: <u>amanda.joyner@unioncountync.gov</u>

Quoting Salesperson:
Name: <u>Dianne Nelms</u>
Phone: <u>910-214-2956</u>
Email: <u>dianne.nelms@deaconjones</u>



Deacon Jones

AUTO GROUP FLEET SALES

605 Warsaw Road, Clinton North Carolina 28328



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford Explorer Active Trim

North Carolina Statewide Term Contract 2510A

SUV's and Crossovers

Contract Term Dates: Feb 01, 2024 - Jan 31, 2029

County Of Union

Drivetrain Configurations

2.3L EcoBoost	☐	K7D-200A	2026 Ford Explorer, Active Trim, RWD, 2.3L Ecoboost	\$ 36,926.66
	☒	K8D-200A	2026 Ford Explorer, Active Trim, 4WD, 2.3L Ecoboost	\$ 38,784.16

2510A Base Vehicle Configuration

Base Body Configuration

119	119" Wheel Base	Base
-----	-----------------	------

Base Powertrain Configuration

99H	2.3L EcoBoost I-4 Engine RWD (99B-3.3L V-6 4WD)	Base
44T	10 Speed Automatic Transmission	Base

Base Interior Configuration

YZ	Oxford White	Base
8	Cloth Seats	Base
H	Space Gray	Base

Base Package / Options

	P255/65R-18" All Season BSW Tire	Base
	18" Painted Aluminum Wheels	Base
B4A	Fleet Invoice Structure	Base
153	Front License Plate Bracket	Base
	Second Row Captain's Chairs Bench with E-Z Entry ¹ and Armrests	

Code

Additional Factory Options

MSRP

6% Disc

☒	153	Front License Plate Bracket	N/C	N/C
☐	68A	Active Comfort Package- see note	\$ 3,145	\$ 2,956.30
☐	17U	Second Row Seating, 35/30/35 Bench with E-Z Entry Armrests	N/C	N/C
☐	16B	Floor Liners, Front and Second Rows- with carpet mats	\$ 200	\$ 188.00
☐	16A	Floor Liners, Front and Second Rows- without carpet mats	\$ 160	\$ 150.40
☐	41H	Engine Block Heater	\$ 190	\$ 178.60
☐	61E	SecuriCode Keyless Entry Keypad	\$ 455	\$ 427.70
☐	942	Daytime Running Lights	\$ 45	\$ 42.30
☐	76U	18" Spare Tire and Jack Kit. Deletes Tire Inflator Kit	\$ 376	\$ 353.44

Standard Colors:			Quantity	Enter Quantity Here
☐	UM	Agate Black		
☒	YZ	Oxford White	1.00	
☐	M7	Carbonized Grey		
☐	A3	Space White Metallic		
☐	T9	Marsh Gray		

Emergency Equipment/Lighting Upfit			
☒		2 EXTRA KEY FOBS..\$280 EACH	\$ 560
☐			
☐			
☐			

Total Price Per Vehicle:		\$ 39,344.16
Number Units This Spec:		1.00
Total this Order:		\$ 39,344.16

Notes & Instructions:

Agency Information:
Agency Name: <u>County Of Union</u>
Contact: <u>Mandy Joyner</u>
Position: <u>Office Supervisor</u>
Address 1: <u>610 Patton Ave</u>
Address 2: _____
City, State, Zip: <u>Monroe NC 28110</u>
Office Phone: <u>704-283-3893</u>
Cell Phone: _____
Email: <u>amanda.joyner@unioncountync.gov</u>

Quoting Salesperson:	 Deacon Jones AUTO GROUP FLEET SALES
Name: <u>Dianne Nelms</u>	
Phone: <u>910-214-2956</u>	
Email: <u>dianne.nelms@deaconjones.com</u>	
605 Warsaw Road, Clinton North Carolina 28328	

10/15/25
Reg 266

Lin #3

55-14 TPL

10/15/25



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-250 Super Duty XL Pickup CREW CAB, 160"/176" WB, 6.75'/8.0' Bed

North Carolina Statewide Term Contract 2510A

County Of Union

Contract Term Dates: Feb 01, 2024 - Jan 31, 2029

Standard Features

6.8 Liter, 2 Valve DEVCT NA PFI Gas V-8 Engine	HD Vinyl 40-20-40 Front Seat
TorqueShift-G 10 Speed Automatic Trans	Rear View Camera in Center Stack
2.5" Trailer Receiver Hitch with Trailer Wiring	Remote Keyless Entry
Electronic Shift on the Fly 4wd Actuation on 4wd	Cruise Control
Black Bumpers and Grill (Chrome Available)	Spare Tire, Wheel, and Frame Mount W/Jack
Manual Telescoping, Power Glass Mirrors	Tow Hooks - 2 Front
17" Argent Painted Steel Wheels	Trailer Tow Package (7 Wire Harness, 7/4 pin connect)
Power Windows (1 touch up/down front row)	Power Equipment Group (Windows, Locks, Tailgate)
Single Zone Air Conditioning	TPMS Tire Pressure Monitoring
SYNC 4, 8" LCD Screen, Apple Car Play	Stationary Elevated Idle Control (SEIC)
FordPass Connect	Battery: Gas-750CCA, Diesel-750CCA X2
Black Vinyl Floor Covering	Non Limited Slip rear axle standard

Drivetrain Configurations

6.8L Gas V-8 Engine	☐	W2A-600A	F-250 SD, 2WD Crew Cab, XL, 160"WB 6.75' Bed	\$ 44,738.77
	☐	W2A-600A	F-250 SD, 2WD Crew Cab, XL, 176"WB 8.0' Bed	\$ 44,922.99
	☒	W2B-600A	F-250 SD, 4WD Crew Cab, XL, 160"WB 6.75' Bed	\$ 47,310.78
	☐	W2B-600A	F-250 SD, 4WD Crew Cab, XL, 176"WB 8.0' Bed	\$ 47,503.14

NC2510A Base Vehicle Configuration

Base Body Configuration

160	160" Wheel Base, 6.75' Pick Up Bed	Base
-----	------------------------------------	------

Base Powertrain Configuration

99A	6.8L PFI V-8 Gas Engine	Base
44F	10 Speed Automatic Transmission	Base

Base Interior Configuration

Z1	Oxford White Color	Base
A	Vinyl 40/20/40 Seat	Base
S	Medium Earth Grey	Base

Base Package / Options

600A	XL Equipment Package	Base
------	----------------------	------

Code

Powertrain Options

MSRP

6% Disc

☒	99A/44F	6.8L 2V DEVCT V-8 GAS/TORQSHIFT 10 SPEED	STD	STD
☐	99T/44G	6.7L 4 Valve OHV Power Stroke® V8 Turbo Diesel B20	\$ 10,995	\$ 10,335.30
☐	99M/44G	6.7L HIGH OUTPUT Power Stroke® V8 Turbo Diesel B20	\$ 13,495	\$ 12,685.30
☐	99N/44G	7.3L 2V Gas DEVCT PFI NA V8 (With STX Package only F-250)	\$ 1,500	\$ 1,410.00

Code	Available Factory Options		MSRP	6% Disc
Note: All Options May Not Be Compatible. Submit Build Request For Final Build Confirmation.				
Seating Options				
☐	AS	Vinyl 40/20/40 Front Bench Seat	STD	STD
☒	LS	Vinyl 40/Console/40 Front Seat	\$ 355	\$ 333.70
☐	1S	Cloth 40/20/40 Front Bench Seat	\$ 100	\$ 94.00
☐	4S	Cloth 40/Console/40 Front Seat	\$ 515	\$ 484.10
Interior Options				
☐	43C	120V/400W Outlet (Requires 40/20/40 Seating)	\$ 175	\$ 164.50
☐	52S	Interior Work Surface (Requires 40/20/40 Seating)	\$ 140	\$ 131.60
☒	76S	Remote Start System	\$ 250	\$ 235.00
☐	66S	Upfitter Switches (Includes 67D Alternator Upgrade)	\$ 230	\$ 216.20
☐	67D	190 AMP Alternator Upgrade	N/C	N/C
Exterior Options				
☒	18B	Black Running Boards	\$ 445	\$ 418.30
☒	153	Front License Plate Bracket	N/C	N/C
☐	85S	Spray In Bedliner	\$ 625	\$ 587.50
☐	592	LED Roof Mounted Clearance Lights	\$ 95	\$ 89.30
☐	85G	Tailgate Step	\$ 375	\$ 352.50
☐	435/924	Power Sliding Rear Glass with Privacy Glass & Defroster	\$ 954	\$ 896.76
☐	76C	Back Up Alarm	\$ 230	\$ 216.20
Functional				
☐	41H	Engine Block Heater (Includes Grill Cover)	\$ 190	\$ 178.60
☐	43K	Pro Power Onboard (Requires 86M)	\$ 985	\$ 925.90
☐	86M	Dual Batteries (Included with Powerstroke) Req 67B or 43K	\$ 210	\$ 197.40
☒	52B	Integrated Trailer Brake Controller	\$ 300	\$ 282.00
☐	66L	LED Bed Lighting (Includes LED 3rd Brake Light)	\$ 60	\$ 56.40
☐	53W	5th Wheel/Gooseneck Prep Kit (See NOTE)	\$ 650	\$ 611.00
Tires				
☒	64A	17" Argent Painted Steel with Center Caps	STD	STD
☐	TD8	LT245/75RX17E BSW A/S - ALL SEASON TIRES	STD	STD
☒	TBM	LT245/75RX17E BSW A/T - ALL TERRAIN TIRES	\$ 165	\$ 155.10
Packages				
☐	96V	XL Chrome Package	\$ 325	\$ 305.50
☒	17Z	XL Off Road Package (SRW Only, N/A with STX)	\$ 995	\$ 935.30
☐	X3H	3:31 Electronic Locking Rear Axle (Req with FX-4 Package)	\$ 430	\$ 404.20
☐	17X	FX-4 Off Road Package (4wd Only, Req Lock Diff, AT Tires)	\$ 550	\$ 517.00
STX Appearance Package				
☐	17S	STX Appearance Package	\$ 3,115	\$ 2,928.10
OPTIONS BELOW AVAILABLE ONLY WITH STX PACKAGE				
☐	99N/44F	7.3L 2V DEVCT NA PFI V8 Gas/TorqShift® 10SPEED	\$ 1,500	\$ 1,410.00
☐	1S	REQUIRES SEAT 1S: 40-20-40 BENCH CLOTH	N/C	N/C

Code	Additional Options	
☒		Spare Keys \$ 560.00
☐		
☐		

Code	Standard Colors	Quantity
☐ UM	Agate Black	
☐ E9	Argon Blue	
☐ M7	Carbonized Grey	
☐ DR	Avalanch	
☒ Z1	Oxford White	1.00
☐ PQ	Race Red	
☐ JS	Iconic Silver	
☐ E4	Vermillion Red	

Enter Quantity Here

Total Price Per Vehicle: \$ 50,230.18

Number Units This Spec: 1.00

Total this Order: \$ 50,230.18

Notes & Instructions: **Quote Date:** 10/15/2025

Note: Ford Super Duty ordering Matrix is extremely complicated with multiple configuration requirements. Please submit this form back to Performance so we build this vehicle in the Ford order system to confirm compatibility and availability

Agency Information:

Agency Name: County Of Union

Contact: Mandy Joyner

Position: Office Supervisor

Address 1: 610 Patton Ave

Address 2: _____

City, State, Zip: Monroe NC 28110

Office Phone: 704-283-3893

Cell Phone: _____

Email: amanda.joyner@unioncountync.gov

Quoting Salesperson: Name: DIANNE NELMS Phone: 910-214-2956 Email: _____	 Deacon Jones  Ford / Chrysler of Clinton    
---	--

10/15/25
reg 266

Line # 4

SW EXP.
6025211



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-250 Super Duty XL Pickup CREW CAB, 160"/176" WB, 6.75'/8.0' Bed

North Carolina Statewide Term Contract 2510A

County Of Union

Contract Term Dates: Feb 01, 2024 - Jan 31, 2029

Standard Features

6.8 Liter, 2 Valve DEVCT NA PFI Gas V-8 Engine
TorqueShift-G 10 Speed Automatic Trans
2.5" Trailer Receiver Hitch with Trailer Wiring
Electronic Shift on the Fly 4wd Acuation on 4wd
Black Bumpers and Grill (Chrome Available)
Manual Telescoping, Power Glass Mirrors
17" Argent Painted Steel Wheels
Power Windows (1 touch up/down front row)
Single Zone Air Conditioning
SYNC 4, 8" LCD Screen, Apple Car Play
FordPass Connect
Black Vinyl Floor Covering

HD Vinyl 40-20-40 Front Seat
Rear View Camera in Center Stack
Remote Keyless Entry
Cruise Control
Spare Tire, Wheel, and Frame Mount W/Jack
Tow Hooks - 2 Front
Trailer Tow Package (7 Wire Harness, 7/4 pin connect)
Power Equipment Group (Windows, Locks, Tailgate)
TPMS Tire Pressure Monitoring
Stationary Elevated Idle Control (SEIC)
Battery: Gas-750CCA, Diesel-750CCA X2
Non Limited Slip rear axle standard

Drivetrain Configurations

6.8L Gas V-8 Engine	☐	W2A-600A	F-250 SD, 2WD Crew Cab, XL, 160"WB 6.75' Bed	\$ 44,738.77
	☐	W2A-600A	F-250 SD, 2WD Crew Cab, XL, 176"WB 8.0' Bed	\$ 44,922.99
	☒	W2B-600A	F-250 SD, 4WD Crew Cab, XL, 160"WB 6.75' Bed	\$ 47,310.78
	☐	W2B-600A	F-250 SD, 4WD Crew Cab, XL, 176"WB 8.0' Bed	\$ 47,503.14

NC2510A Base Vehicle Configuration

Base Body Configuration

160	160" Wheel Base, 6.75' Pick Up Bed	Base
-----	------------------------------------	------

Base Powertrain Configuration

99A	6.8L PFI V-8 Gas Engine	Base
44F	10 Speed Automatic Transmission	Base

Base Interior Configuration

Z1	Oxford White Color	Base
A	Vinyl 40/20/40 Seat	Base
S	Medium Earth Grey	Base

Base Package / Options

600A	XL Equipment Package	Base
------	----------------------	------

Code

Powertrain Options

MSRP

6% Disc

☒	99A/44F	6.8L 2V DEVCT V-8 GAS/TORQSHIFT 10 SPEED	STD	STD
☐	99T/44G	6.7L 4 Valve OHV Power Stroke® V8 Turbo Diesel B20	\$ 10,995	\$ 10,335.30
☐	99M/44G	6.7L HIGH OUTPUT Power Stroke® V8 Turbo Diesel B20	\$ 13,495	\$ 12,685.30
☐	99N/44G	7.3L 2V Gas DEVCT PFI NA V8 (With STX Package only F-250)	\$ 1,500	\$ 1,410.00

Code	Available Factory Options		MSRP	6% Disc
Note: All Options May Not Be Compatible. Submit Build Request For Final Build Confirmation.				
Seating Options				
☒	AS	Vinyl 40/20/40 Front Bench Seat	STD	STD
☐	LS	Vinyl 40/Console/40 Front Seat	\$ 355	\$ 333.70
☐	1S	Cloth 40/20/40 Front Bench Seat	\$ 100	\$ 94.00
☐	4S	Cloth 40/Console/40 Front Seat	\$ 515	\$ 484.10
Interior Options				
☐	43C	120V/400W Outlet (Requires 40/20/40 Seating)	\$ 175	\$ 164.50
☐	52S	Interior Work Surface (Requires 40/20/40 Seating)	\$ 140	\$ 131.60
☐	76S	Remote Start System	\$ 250	\$ 235.00
☐	66S	Upfitter Switches (Includes 67D Alternator Upgrade)	\$ 230	\$ 216.20
☐	67D	190 AMP Alternator Upgrade	N/C	N/C
Exterior Options				
☒	18B	Black Running Boards	\$ 445	\$ 418.30
☒	153	Front License Plate Bracket	N/C	N/C
☒	85S	Spray In Bedliner	\$ 625	\$ 587.50
☐	592	LED Roof Mounted Clearance Lights	\$ 95	\$ 89.30
☐	85G	Tailgate Step	\$ 375	\$ 352.50
☐	435/924	Power Sliding Rear Glass with Privacy Glass & Defroster	\$ 954	\$ 896.76
☐	76C	Back Up Alarm	\$ 230	\$ 216.20
Functional				
☐	41H	Engine Block Heater (Includes Grill Cover)	\$ 190	\$ 178.60
☐	43K	Pro Power Onboard (Requires 86M)	\$ 985	\$ 925.90
☐	86M	Dual Batteries (Included with Powerstroke) Req 67B or 43K	\$ 210	\$ 197.40
☒	52B	Integrated Trailer Brake Controller	\$ 300	\$ 282.00
☐	66L	LED Bed Lighting (Includes LED 3rd Brake Light)	\$ 60	\$ 56.40
☐	53W	5th Wheel/Gooseneck Prep Kit (See NOTE)	\$ 650	\$ 611.00
Tires				
☒	64A	17" Argent Painted Steel with Center Caps	STD	STD
☐	TD8	LT245/75RX17E BSW A/S - ALL SEASON TIRES	STD	STD
☐	TBM	LT245/75RX17E BSW A/T - ALL TERRAIN TIRES	\$ 165	\$ 155.10
Packages				
☐	96V	XL Chrome Package	\$ 325	\$ 305.50
☒	17Z	XL Off Road Package (SRW Only, N/A with STX)	\$ 995	\$ 935.30
☐	X3H	3:31 Electronic Locking Rear Axle (Req with FX-4 Package)	\$ 430	\$ 404.20
☐	17X	FX-4 Off Road Package (4wd Only, Req Lock Diff, AT Tires)	\$ 550	\$ 517.00
STX Appearance Package				
☐	17S	STX Appearance Package	\$ 3,115	\$ 2,928.10
OPTIONS BELOW AVAILABLE ONLY WITH STX PACKAGE				
☐	99N/44F	7.3L 2V DEVCT NA PFI V8 Gas/TorqShift® 10SPEED	\$ 1,500	\$ 1,410.00
☐	1S	REQUIRES SEAT 1S: 40-20-40 BENCH CLOTH	N/C	N/C

Code	Additional Options	
☒		Spare Keys..\$280 EACH \$ 560.00
☐		
☐		

Code	Standard Colors	Quantity	Enter Quantity Here
☐ UM	Agate Black		
☐ E9	Argon Blue		
☐ M7	Carbonized Grey		
☐ DR	Avalanch		
☒ Z1	Oxford White	1.00	
☐ PQ	Race Red		
☐ JS	Iconic Silver		
☐ E4	Vermillion Red		

Total Price Per Vehicle: \$ 50,093.88

Number Units This Spec: 1.00

Total this Order: \$ 50,093.88

Notes & Instructions:

Quote Date: 10/2/2025

Note: Ford Super Duty ordering Matrix is extremely complicated with multiple configuration requirements. Please submit this form back to Performance so we build this vehicle in the Ford order system to confirm compatibility and availability

Agency Information:

Agency Name: County Of Union

Contact: Mandy Joyner

Position: Office Supervisor

Address 1: 610 Patton Ave

Address 2:

City, State, Zip: Monroe NC 28110

Office Phone: 704-283-3893

Cell Phone:

Email: amanda.joyner@unioncountync.gov

Quoting Salesperson:

Name: Dianne Nelms

Phone: 910-214-2956

Email: dianne.nelms@deaconjonesautogroup.com



Deacon Jones



Ford / Chrysler of Clinton



10/15/25
Reg 264

Line #5

33-13 Rpt.
06026512



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-150 SUPER CAB

North Carolina Statewide Vehicle Contract #2510A

Contract Term Dates: FEB. 1, 2024 - JAN. 31, 2029

County of Union

Drivetrain Configurations

27-191T	☐	X1K-101A	2026 Ford F-150 SUPER CAB, 2WD, 6.5' Bed (2.7L V-6 STD)	\$ 36,841.73
27-197T	☒	X1L-101A	2026 Ford F-150 SUPER CAB, 4WD, 6.5' Bed (2.7L V-6 STD)	\$ 40,351.14

Option Availability and Compatibility Vary

USE THIS FORM AS A GUIDE

Please Return to your Deacon Jones Representative For Confirmation

Popular Factory Options

Code Please Consult F-150 Order Guide for Add'l Options MSRP 6% Disc

Powertrain Options 6'5" Bed, 145" Wheel Base

☒	99P	2.7L EcoBoost V-6 w/ Auto Start/Stop (Standard)	STD	STD
☐	995	5.0L V-8 Engine (in Lieu of 2.7L EcoBoost)	\$ 2,340	\$ 2,199.60
☐	998	3.5L EcoBoost V-6 (in Lieu of 2.7L V-6 EcoBoost)	\$ 2,220	\$ 2,086.80

Packages

☒	101A	XL Base Trim Level	STD	STD
☐	103A	XL High Trim Level	\$ 1,195	\$ 1,123.30

Interior Options

☐	CS	Cloth 40/20/40 Bench Front Seat	Standard	Standard
☒	AS	Vinyl 40/20/40 Bench Front Seat	N/C	N/C
☐	76E	Sirius/XM with 360L (3 Year Plan)	\$ 330	\$ 310.20
☐	91P	8 Way Power Driver's Seat	\$ 350	\$ 329.00

Exterior Options

☒	153	Front License Plate Bracket	N/C	N/C
☐	41H	Engine Block Heater	\$ 190	\$ 178.60
☒	18B	Black Platform Running Boards	\$ 250	\$ 235.00
☐	924	Fixed Rear Window Privacy Glass with Defroster	\$ 100	\$ 94.00
☐	85H	Back Up Alarm	\$ 235	\$ 220.90
☐	942	Non Configurable Daytime Running Lights	\$ 45	\$ 42.30
☒	413	Skid Plates (4X4 Only)	\$ 160	\$ 150.40
☐	T7C	LT265/70R17C BSW A/T Tires (Light Truck Spec)	\$ 495	\$ 465.30
☒	67T	Integrated Trailer Brake Controller (2.7L V-6 ONLY)	\$ 275	\$ 258.50
☐	53T	Tow/Haul Package (5.0L V-8 & 3.5L V-6 EcoBoost Engine Only)	\$ 1,010	\$ 949.40

Truck Bed Options				
☒	96W	Tough Bed Spray In Bedliner	\$ 625	\$ 587.50
☐	63T	Tailgate Step with Work Surface	\$ 445	\$ 418.30
☐	90B	Weather Guard Alum cross bed tool box - MATTE BLACK	\$ 1,055	\$ 991.70
☐	90P	Weather Guard Alum cross bed tool box - BRIGHT	\$ 1,055	\$ 991.70
☐	96J	Retractable Weather Guard Tonneau (N/A 90B or 90P)	\$ 2,250	\$ 2,115.00
☐	96X	Hard Folding Weather Guard Tonneau Cover (N/A 90B or 90P)	\$ 1,280	\$ 1,203.20

FOR MORE EXTENSIVE TOWING NEEDS, PLEASE CONSULT THE FORD F-150 ORDER GUIDE

Dealer Added Options				
☒		2 EXTRA KEYS	\$ 596	\$ 560.24
☐				\$ -

Standard Colors:			Quantity	
☐	UM	Agate Black Metallic		Quantity
☐	M7	Carbonized Gray Metallic		
☐	JS	Iconic Silver Metallic		
☒	YZ	Oxford White	5.00	

Total Price Per Vehicle: \$ 42,142.78

Number Units This Spec: 5.00

Total this Order: \$ 210,713.90

Notes & Instructions: _____
Quote Date: 10/15/2025

Agency Information:

Agency Name: County of Union
 Contact: Mandy Joyner
 Position: Office Supervisor
 Address 1: 610 Patton Ave
 Address 2: _____
 City, State, Zip: Monroe NC 28110
 Office Phone: 704-283-3893
 Cell Phone: _____
 Email: amanda.joyner@unioncountync.gov

Quoting Salesperson:

Name: DIANNE NELMS

Phone: 910-214-2956

Email: _____



Deacon Jones 
 Ford of Clinton



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-150 SUPER CAB

North Carolina Statewide Vehicle Contract #2510A

Contract Term Dates: FEB. 1, 2024 - JAN. 31, 2029

County of Union

Drivetrain Configurations

27-191T	☐	X1K-101A	2026 Ford F-150 SUPER CAB, 2WD, 6.5' Bed (2.7L V-6 STD)	\$ 36,841.73
27-197T	☒	X1L-101A	2026 Ford F-150 SUPER CAB, 4WD, 6.5' Bed (2.7L V-6 STD)	\$ 40,351.14

Option Availability and Compatibility Vary

USE THIS FORM AS A GUIDE

Please Return to your Deacon Jones Representative For Confirmation

Popular Factory Options

Code Please Consult F-150 Order Guide for Add'l Options MSRP 6% Disc

Powertrain Options 6'5" Bed, 145" Wheel Base

☒	99P	2.7L EcoBoost V-6 w/ Auto Start/Stop (Standard)	STD	STD
☐	995	5.0L V-8 Engine (in Lieu of 2.7L EcoBoost)	\$ 2,340	\$ 2,199.60
☐	998	3.5L EcoBoost V-6 (in Lieu of 2.7L V-6 EcoBoost)	\$ 2,220	\$ 2,086.80

Packages

☒	101A	XL Base Trim Level	STD	STD
☐	103A	XL High Trim Level	\$ 1,195	\$ 1,123.30

Interior Options

☐	CS	Cloth 40/20/40 Bench Front Seat	Standard	Standard
☒	AS	Vinyl 40/20/40 Bench Front Seat	N/C	N/C
☐	76E	Sirius/XM with 360L (3 Year Plan)	\$ 330	\$ 310.20
☐	91P	8 Way Power Driver's Seat	\$ 350	\$ 329.00

Exterior Options

☒	153	Front License Plate Bracket	N/C	N/C
☐	41H	Engine Block Heater	\$ 190	\$ 178.60
☒	18B	Black Platform Running Boards	\$ 250	\$ 235.00
☐	924	Fixed Rear Window Privacy Glass with Defroster	\$ 100	\$ 94.00
☐	85H	Back Up Alarm	\$ 235	\$ 220.90
☐	942	Non Configurable Daytime Running Lights	\$ 45	\$ 42.30
☒	413	Skid Plates (4X4 Only)	\$ 160	\$ 150.40
☐	T7C	LT265/70R17C BSW A/T Tires (Light Truck Spec)	\$ 495	\$ 465.30
☒	67T	Integrated Trailer Brake Controller (2.7L V-6 ONLY)	\$ 275	\$ 258.50
☐	53T	Tow/Haul Package (5.0L V-8 & 3.5L V-6 EcoBoost Engine Only)	\$ 1,010	\$ 949.40

Truck Bed Options				
☒	96W	Tough Bed Spray In Bedliner	\$ 625	\$ 587.50
☐	63T	Tailgate Step with Work Surface	\$ 445	\$ 418.30
☐	90B	Weather Guard Alum cross bed tool box - MATTE BLACK	\$ 1,055	\$ 991.70
☐	90P	Weather Guard Alum cross bed tool box - BRIGHT	\$ 1,055	\$ 991.70
☐	96J	Retractable Weather Guard Tonneau (N/A 90B or 90P)	\$ 2,250	\$ 2,115.00
☐	96X	Hard Folding Weather Guard Tonneau Cover (N/A 90B or 90P)	\$ 1,280	\$ 1,203.20

FOR MORE EXTENSIVE TOWING NEEDS, PLEASE CONSULT THE FORD F-150 ORDER GUIDE

Dealer Added Options				
☒		2 EXTRA KEYS	\$ 596	\$ 560.24
☐				\$ -

Standard Colors:			Quantity	
☐	UM	Agate Black Metallic		Quantity
☐	M7	Carbonized Gray Metallic		
☐	JS	Iconic Silver Metallic		
☒	YZ	Oxford White	5.00	

Total Price Per Vehicle: \$ 42,142.78

Number Units This Spec: 5.00

Total this Order: \$ 210,713.90

Notes & Instructions: **Quote Date:** 10/15/2025

Agency Information:

Agency Name: County of Union

Contact: Mandy Joyner

Position: Office Supervisor

Address 1: 610 Patton Ave

Address 2: _____

City, State, Zip: Monroe NC 28110

Office Phone: 704-283-3893

Cell Phone: _____

Email: amanda.joyner@unioncountync.gov

Quoting Salesperson:

Name: DIANNE NELMS

Phone: 910-214-2956

Email: _____



Deacon Jones



Ford of Clinton

10/15/25
Reg 206

Line # 7

16-16 Rpl.

600626813



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-150 SUPER CAB

North Carolina Statewide Vehicle Contract #2510A

Contract Term Dates: FEB. 1, 2024 - JAN. 31, 2029

County of Union

Drivetrain Configurations

27-191T	☐	X1K-101A	2026 Ford F-150 SUPER CAB, 2WD, 6.5' Bed (2.7L V-6 STD)	\$ 36,841.73
27-197T	☒	X1L-101A	2026 Ford F-150 SUPER CAB, 4WD, 6.5' Bed (2.7L V-6 STD)	\$ 40,351.14

Option Availability and Compatibility Vary
USE THIS FORM AS A GUIDE
 Please Return to your Deacon Jones Representative For Confirmation

Popular Factory Options

Code Please Consult F-150 Order Guide for Add'l Options MSRP 6% Disc

Powertrain Options 6'5" Bed, 145" Wheel Base				
☒	99P	2.7L EcoBoost V-6 w/ Auto Start/Stop (Standard)	STD	STD
☐	995	5.0L V-8 Engine (in Lieu of 2.7L EcoBoost)	\$ 2,340	\$ 2,199.60
☐	998	3.5L EcoBoost V-6 (in Lieu of 2.7L V-6 EcoBoost)	\$ 2,220	\$ 2,086.80
Packages				
☒	101A	XL Base Trim Level	STD	STD
☐	103A	XL High Trim Level	\$ 1,195	\$ 1,123.30
Interior Options				
☐	CS	Cloth 40/20/40 Bench Front Seat	Standard	Standard
☒	AS	Vinyl 40/20/40 Bench Front Seat	N/C	N/C
☐	76E	Sirius/XM with 360L (3 Year Plan)	\$ 330	\$ 310.20
☐	91P	8 Way Power Driver's Seat	\$ 350	\$ 329.00
Exterior Options				
☒	153	Front License Plate Bracket	N/C	N/C
☐	41H	Engine Block Heater	\$ 190	\$ 178.60
☒	18B	Black Platform Running Boards	\$ 250	\$ 235.00
☐	924	Fixed Rear Window Privacy Glass with Defroster	\$ 100	\$ 94.00
☐	85H	Back Up Alarm	\$ 235	\$ 220.90
☐	942	Non Configurable Daytime Running Lights	\$ 45	\$ 42.30
☒	413	Skid Plates (4X4 Only)	\$ 160	\$ 150.40
☐	T7C	LT265/70R17C BSW A/T Tires (Light Truck Spec)	\$ 495	\$ 465.30
☒	67T	Integrated Trailer Brake Controller (2.7L V-6 ONLY)	\$ 275	\$ 258.50
☐	53T	Tow/Haul Package (5.0L V-8 & 3.5L V-6 EcoBoost Engine Only)	\$ 1,010	\$ 949.40

Truck Bed Options				
☒	96W	Tough Bed Spray In Bedliner	\$ 625	\$ 587.50
☐	63T	Tailgate Step with Work Surface	\$ 445	\$ 418.30
☐	90B	Weather Guard Alum cross bed tool box - MATTE BLACK	\$ 1,055	\$ 991.70
☐	90P	Weather Guard Alum cross bed tool box - BRIGHT	\$ 1,055	\$ 991.70
☐	96J	Retractable Weather Guard Tonneau (N/A 90B or 90P)	\$ 2,250	\$ 2,115.00
☐	96X	Hard Folding Weather Guard Tonneau Cover (N/A 90B or 90P)	\$ 1,280	\$ 1,203.20

FOR MORE EXTENSIVE TOWING NEEDS, PLEASE CONSULT THE FORD F-150 ORDER GUIDE

Dealer Added Options				
☒		2 EXTRA KEYS	\$ 596	\$ 560.24
☐				\$ -

Standard Colors:

			Quantity	Quantity
☐	UM	Agate Black Metallic		
☐	M7	Carbonized Gray Metallic		
☐	JS	Iconic Silver Metallic		
☒	YZ	Oxford White	5.00	

Total Price Per Vehicle: \$ 42,142.78

Number Units This Spec: 5.00

Total this Order: \$ 210,713.90

Notes & Instructions:

Quote Date: 10/15/2025

Agency Information:

Agency Name: County of Union

Contact: Mandy Joyner

Position: Office Supervisor

Address 1: 610 Patton Ave

Address 2:

City, State, Zip: Monroe NC 28110

Office Phone: 704-283-3893

Cell Phone:

Email: amanda.joyner@unioncountync.gov

Quoting Salesperson:

Name: DIANNE NELMS

Phone: 910-214-2956

Email:



Deacon Jones



Ford of Clinton

10/15/25
reg 2026

line #8

34-13 Rpl.

60026813



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-150 SUPER CAB

North Carolina Statewide Vehicle Contract #2510A

Contract Term Dates: FEB. 1, 2024 - JAN. 31, 2029

County of Union

Drivetrain Configurations

27-191T	☐	X1K-101A	2026 Ford F-150 SUPER CAB, 2WD, 6.5' Bed (2.7L V-6 STD)	\$ 36,841.73
27-197T	☒	X1L-101A	2026 Ford F-150 SUPER CAB, 4WD, 6.5' Bed (2.7L V-6 STD)	\$ 40,351.14

Option Availability and Compatibility Vary

USE THIS FORM AS A GUIDE

Please Return to your Deacon Jones Representative For Confirmation

Popular Factory Options

Code

Please Consult F-150 Order Guide for Add'l Options

MSRP

6% Disc

Powertrain Options 6'5" Bed, 145" Wheel Base

☒	99P	2.7L EcoBoost V-6 w/ Auto Start/Stop (Standard)	STD	STD
☐	995	5.0L V-8 Engine (in Lieu of 2.7L EcoBoost)	\$ 2,340	\$ 2,199.60
☐	998	3.5L EcoBoost V-6 (in Lieu of 2.7L V-6 EcoBoost)	\$ 2,220	\$ 2,086.80

Packages

☒	101A	XL Base Trim Level	STD	STD
☐	103A	XL High Trim Level	\$ 1,195	\$ 1,123.30

Interior Options

☐	CS	Cloth 40/20/40 Bench Front Seat	Standard	Standard
☒	AS	Vinyl 40/20/40 Bench Front Seat	N/C	N/C
☐	76E	Sirius/XM with 360L (3 Year Plan)	\$ 330	\$ 310.20
☐	91P	8 Way Power Driver's Seat	\$ 350	\$ 329.00

Exterior Options

☒	153	Front License Plate Bracket	N/C	N/C
☐	41H	Engine Block Heater	\$ 190	\$ 178.60
☒	18B	Black Platform Running Boards	\$ 250	\$ 235.00
☐	924	Fixed Rear Window Privacy Glass with Defroster	\$ 100	\$ 94.00
☐	85H	Back Up Alarm	\$ 235	\$ 220.90
☐	942	Non Configurable Daytime Running Lights	\$ 45	\$ 42.30
☒	413	Skid Plates (4X4 Only)	\$ 160	\$ 150.40
☐	T7C	LT265/70R17C BSW A/T Tires (Light Truck Spec)	\$ 495	\$ 465.30
☒	67T	Integrated Trailer Brake Controller (2.7L V-6 ONLY)	\$ 275	\$ 258.50
☐	53T	Tow/Haul Package (5.0L V-8 & 3.5L V-6 EcoBoost Engine Only)	\$ 1,010	\$ 949.40

Truck Bed Options				
☒	96W	Tough Bed Spray In Bedliner	\$ 625	\$ 587.50
☐	63T	Tailgate Step with Work Surface	\$ 445	\$ 418.30
☐	90B	Weather Guard Alum cross bed tool box - MATTE BLACK	\$ 1,055	\$ 991.70
☐	90P	Weather Guard Alum cross bed tool box - BRIGHT	\$ 1,055	\$ 991.70
☐	96J	Retractable Weather Guard Tonneau (N/A 90B or 90P)	\$ 2,250	\$ 2,115.00
☐	96X	Hard Folding Weather Guard Tonneau Cover (N/A 90B or 90P)	\$ 1,280	\$ 1,203.20

FOR MORE EXTENSIVE TOWING NEEDS, PLEASE CONSULT THE FORD F-150 ORDER GUIDE

Dealer Added Options				
☒		2 EXTRA KEYS	\$ 596	\$ 560.24
☐				\$ -

Standard Colors:			Quantity
☐	UM	Agate Black Metallic	
☐	M7	Carbonized Gray Metallic	
☐	JS	Iconic Silver Metallic	
☒	YZ	Oxford White	5.00

Total Price Per Vehicle: \$ 42,142.78

Number Units This Spec: 5.00

Total this Order: \$ 210,713.90

Notes & Instructions: **Quote Date:** 10/15/2025

Agency Information:

Agency Name: County of Union
 Contact: Mandy Joyner
 Position: Office Supervisor
 Address 1: 610 Patton Ave
 Address 2:
 City, State, Zip: Monroe NC 28110
 Office Phone: 704-283-3893
 Cell Phone:
 Email: amanda.joyner@unioncountync.gov

Quoting Salesperson:

Name: DIANNE NELMS

Phone: 910-214-2956

Email:



Deacon Jones 
 Ford of Clinton

10/15/25
reg 2046

line #8

34-13 Rpl.

60026813



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-150 SUPER CAB

North Carolina Statewide Vehicle Contract #2510A

Contract Term Dates: FEB. 1, 2024 - JAN. 31, 2029

County of Union

Drivetrain Configurations

27-191T	☐	X1K-101A	2026 Ford F-150 SUPER CAB, 2WD, 6.5' Bed (2.7L V-6 STD)	\$ 36,841.73
27-197T	☒	X1L-101A	2026 Ford F-150 SUPER CAB, 4WD, 6.5' Bed (2.7L V-6 STD)	\$ 40,351.14

Option Availability and Compatibility Vary

USE THIS FORM AS A GUIDE

Please Return to your Deacon Jones Representative For Confirmation

Popular Factory Options

Code Please Consult F-150 Order Guide for Add'l Options MSRP 6% Disc

Powertrain Options 6'5" Bed, 145" Wheel Base

☒	99P	2.7L EcoBoost V-6 w/ Auto Start/Stop (Standard)	STD	STD
☐	995	5.0L V-8 Engine (in Lieu of 2.7L EcoBoost)	\$ 2,340	\$ 2,199.60
☐	998	3.5L EcoBoost V-6 (in Lieu of 2.7L V-6 EcoBoost)	\$ 2,220	\$ 2,086.80

Packages

☒	101A	XL Base Trim Level	STD	STD
☐	103A	XL High Trim Level	\$ 1,195	\$ 1,123.30

Interior Options

☐	CS	Cloth 40/20/40 Bench Front Seat	Standard	Standard
☒	AS	Vinyl 40/20/40 Bench Front Seat	N/C	N/C
☐	76E	Sirius/XM with 360L (3 Year Plan)	\$ 330	\$ 310.20
☐	91P	8 Way Power Driver's Seat	\$ 350	\$ 329.00

Exterior Options

☒	153	Front License Plate Bracket	N/C	N/C
☐	41H	Engine Block Heater	\$ 190	\$ 178.60
☒	18B	Black Platform Running Boards	\$ 250	\$ 235.00
☐	924	Fixed Rear Window Privacy Glass with Defroster	\$ 100	\$ 94.00
☐	85H	Back Up Alarm	\$ 235	\$ 220.90
☐	942	Non Configurable Daytime Running Lights	\$ 45	\$ 42.30
☒	413	Skid Plates (4X4 Only)	\$ 160	\$ 150.40
☐	T7C	LT265/70R17C BSW A/T Tires (Light Truck Spec)	\$ 495	\$ 465.30
☒	67T	Integrated Trailer Brake Controller (2.7L V-6 ONLY)	\$ 275	\$ 258.50
☐	53T	Tow/Haul Package (5.0L V-8 & 3.5L V-6 EcoBoost Engine Only)	\$ 1,010	\$ 949.40

Truck Bed Options

☒	96W	Tough Bed Spray In Bedliner	\$ 625	\$ 587.50
☐	63T	Tailgate Step with Work Surface	\$ 445	\$ 418.30
☐	90B	Weather Guard Alum cross bed tool box - MATTE BLACK	\$ 1,055	\$ 991.70
☐	90P	Weather Guard Alum cross bed tool box - BRIGHT	\$ 1,055	\$ 991.70
☐	96J	Retractable Weather Guard Tonneau (N/A 90B or 90P)	\$ 2,250	\$ 2,115.00
☐	96X	Hard Folding Weather Guard Tonneau Cover (N/A 90B or 90P)	\$ 1,280	\$ 1,203.20

FOR MORE EXTENSIVE TOWING NEEDS, PLEASE CONSULT THE FORD F-150 ORDER GUIDE

Dealer Added Options

☒		2 EXTRA KEYS	\$ 596	\$ 560.24
☐				\$ -

Standard Colors:**Quantity**

☐	UM	Agate Black Metallic		Quantity
☐	M7	Carbonized Gray Metallic		
☐	JS	Iconic Silver Metallic		
☒	YZ	Oxford White	5.00	

Total Price Per Vehicle: \$ 42,142.78**Number Units This Spec:** 5.00**Total this Order:** \$ 210,713.90**Notes & Instructions:****Quote Date:** 10/15/2025**Agency Information:**

Agency Name: County of Union

Contact: Mandy Joyner

Position: Office Supervisor

Address 1: 610 Patton Ave

Address 2:

City, State, Zip: Monroe NC 28110

Office Phone: 704-283-3893

Cell Phone:

Email: amanda.joyner@unioncountync.gov

Quoting Salesperson:

Name: DIANNE NELMS

Phone: 910-214-2956

Email: _____

**Deacon Jones**

Ford of Clinton



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-150 SUPER CAB

North Carolina Statewide Vehicle Contract #2510A

Contract Term Dates: FEB. 1, 2024 - JAN. 31, 2029

County of Union

Drivetrain Configurations

27-191T	☐	X1K-101A	2026 Ford F-150 SUPER CAB, 2WD, 6.5' Bed (2.7L V-6 STD)	\$ 36,841.73
27-197T	☒	X1L-101A	2026 Ford F-150 SUPER CAB, 4WD, 6.5' Bed (2.7L V-6 STD)	\$ 40,351.14

Option Availability and Compatibility Vary

USE THIS FORM AS A GUIDE

Please Return to your Deacon Jones Representative For Confirmation

Popular Factory Options

Code

Please Consult F-150 Order Guide for Add'l Options

MSRP

6% Disc

Powertrain Options 6'5" Bed, 145" Wheel Base

☒	99P	2.7L EcoBoost V-6 w/ Auto Start/Stop (Standard)	STD	STD
☐	995	5.0L V-8 Engine (in Lieu of 2.7L EcoBoost)	\$ 2,340	\$ 2,199.60
☐	998	3.5L EcoBoost V-6 (in Lieu of 2.7L V-6 EcoBoost)	\$ 2,220	\$ 2,086.80

Packages

☒	101A	XL Base Trim Level	STD	STD
☐	103A	XL High Trim Level	\$ 1,195	\$ 1,123.30

Interior Options

☐	CS	Cloth 40/20/40 Bench Front Seat	Standard	Standard
☒	AS	Vinyl 40/20/40 Bench Front Seat	N/C	N/C
☐	76E	Sirius/XM with 360L (3 Year Plan)	\$ 330	\$ 310.20
☐	91P	8 Way Power Driver's Seat	\$ 350	\$ 329.00

Exterior Options

☒	153	Front License Plate Bracket	N/C	N/C
☐	41H	Engine Block Heater	\$ 190	\$ 178.60
☒	18B	Black Platform Running Boards	\$ 250	\$ 235.00
☐	924	Fixed Rear Window Privacy Glass with Defroster	\$ 100	\$ 94.00
☐	85H	Back Up Alarm	\$ 235	\$ 220.90
☐	942	Non Configurable Daytime Running Lights	\$ 45	\$ 42.30
☒	413	Skid Plates (4X4 Only)	\$ 160	\$ 150.40
☐	T7C	LT265/70R17C BSW A/T Tires (Light Truck Spec)	\$ 495	\$ 465.30
☒	67T	Integrated Trailer Brake Controller (2.7L V-6 ONLY)	\$ 275	\$ 258.50
☐	53T	Tow/Haul Package (5.0L V-8 & 3.5L V-6 EcoBoost Engine Only)	\$ 1,010	\$ 949.40

Truck Bed Options				
☒	96W	Tough Bed Spray In Bedliner	\$ 625	\$ 587.50
☐	63T	Tailgate Step with Work Surface	\$ 445	\$ 418.30
☐	90B	Weather Guard Alum cross bed tool box - MATTE BLACK	\$ 1,055	\$ 991.70
☐	90P	Weather Guard Alum cross bed tool box - BRIGHT	\$ 1,055	\$ 991.70
☐	96J	Retractable Weather Guard Tonneau (N/A 90B or 90P)	\$ 2,250	\$ 2,115.00
☐	96X	Hard Folding Weather Guard Tonneau Cover (N/A 90B or 90P)	\$ 1,280	\$ 1,203.20

FOR MORE EXTENSIVE TOWING NEEDS, PLEASE CONSULT THE FORD F-150 ORDER GUIDE

Dealer Added Options				
☒		2 EXTRA KEYS	\$ 596	\$ 560.24
☐				\$ -

Standard Colors:			Quantity
☐	UM	Agate Black Metallic	
☐	M7	Carbonized Gray Metallic	
☐	JS	Iconic Silver Metallic	
☒	YZ	Oxford White	5.00

Total Price Per Vehicle: \$ 42,142.78

Number Units This Spec: 5.00

Total this Order: \$ 210,713.90

Notes & Instructions: _____

Quote Date: 10/15/2025

Agency Information:

Agency Name: County of Union
 Contact: Mandy Joyner
 Position: Office Supervisor
 Address 1: 610 Patton Ave
 Address 2: _____
 City, State, Zip: Monroe NC 28110
 Office Phone: 704-283-3893
 Cell Phone: _____
 Email: amanda.joyner@unioncountync.gov

Quoting Salesperson:

Name: DIANNE NELMS

Phone: 910-214-2956

Email: _____



Deacon Jones 
 Ford of Clinton

10/15/25
Reg 210p

Line#10

WC Water Exp
60026710



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton

2026 Ford F-150 CREW CAB 5'5" BED

North Carolina Statewide Term Contract 2510A

Contract Term Dates: Feb 01, 2024 - Jan 31, 2029

COUNTY OF UNION

Standard Features - Subject to Change

2.7L V-6 Ecoboost Standard
3.5L V-6 Ecoboost & 5.0L V-8 Optional
Electronic Shift on The Fly 4wd Actuation
23 Gallon Std Fuel Tank (36 Gallon Upgrade Avail)
Manual Folding, Power Glass Mirrors w/ Heat
245/70R17 BSW All Season A/S (Std on RWD)
265/70R17 BSW All Terrain A/T (Std on 4wd)
Class IV Trailer Hitch with 4/7 Pin Connector
Black Vinyl Floor Covering Standard

Power Door Locks with Keyless Entry Std
Power Windows
40/20/40 Cloth Bench Front Seat Standard
Cruise Control Standard
Wiper Activated Headlamps
LED Reflector Headlamps
Spare tire, Carrier, and Jack Standard
Black Bumper and Grille Standard
Front Tow Hooks (2) Standard

FORD Co-Pilot 360 2.0
BLIS with Cross-Traffic Alert
Lane Keeping System
Reverse Sensing, Reverse Brake Assist
Pre Collision Assist with Auto Emergency Braking
Auto Headlights with Auto High Beam

SYNC 4 with Enhanced Voice Recognition
Apple Car Play & Android Auto Compatibility
Wireless Phone Connection
1yr Connected Navigation
Voice Command Recognition
12" LCD Touchscreen with Swipe Capability

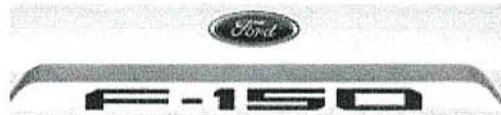
Drivetrain Configurations

5.5 ft Bed	☐	W1K-101A	2026 Ford F-150 CREW CAB, 2WD, 5.5' Bed (2.7L V-6 STD)	\$ 38,489.57
145" WB	☒	W1L-101A	2026 Ford F-150 CREW CAB, 4WD, 5.5' Bed (2.7L V-6 STD)	\$ 42,078.37

Option Availability and Compatibility Vary

USE THIS FORM AS A GUIDE

Please Return to your Deacon Jones Representative For Confirmation



Popular Factory Options

Code
Please Consult F-150 Order Guide for Add'l Options
MSRP
6% Disc

Powertrain Options 5'5" Bed, 145" Wheel Base

☒	99P	2.7L EcoBoost V-6 w/ Auto Start/Stop (Standard)	STD	STD
☐	995	5.0L V-8 Engine (in Lieu of 2.7L EcoBoost)	\$ 2,340	\$ 2,199.60
☐	998	3.5L EcoBoost V-6 (in Lieu of 2.7L EcoBoost)	\$ 2,220	\$ 2,086.80

Packages

☒	101A	XL Base Trim Level	STD	STD
☐	103A	XL High Trim Level	\$ 1,195	\$ 1,123.30

Interior Options

☐	CS	Cloth 40/20/40 Bench Front Seat	Standard	Standard
☒	AS	Vinyl 40/20/40 Bench Front Seat	N/C	N/C
☐	76E	Sirius/XM with 360L (3 Year Plan)	\$ 330	\$ 310.20
☐	91P	8 Way Power Driver's Seat	\$ 350	\$ 329.00

Exterior Options

☒	153	Front License Plate Bracket	N/C	N/C
☐	41H	Engine Block Heater	\$ 190	\$ 178.60
☒	18B	Black Platform Running Boards	\$ 250	\$ 235.00
☐	924	Fixed Rear Window Privacy Glass with Defroster	\$ 100	\$ 94.00
☐	85H	Back Up Alarm	\$ 235	\$ 220.90
☐	942	Non Configurable Daytime Running Lights	\$ 45	\$ 42.30
☒	413	Skid Plates (4wd Only)	\$ 160	\$ 150.40
☐	T7C	LT265/70R17C BSW A/T Tires (Light Truck Spec)	\$ 495	\$ 465.30
☒	67T	Integrated Trailer Brake Controller (2.7L V-6 ONLY)	\$ 275	\$ 258.50
☐	53T	Tow/Haul Package (5.0L V-8 & 3.5L V-6 EcoBoost Engine Only)	\$ 1,010	\$ 949.40

Truck Bed Options

☒	96W	Tough Bed Spray In Bedliner	\$ 625	\$ 587.50
☐	63T	Tailgate Step with Work Surfaces	\$ 445	\$ 418.30
☐	90B	Weather Guard Alum cross bed tool box - MATTE BLACK	\$ 1,055	\$ 991.70
☐	90P	Weather Guard Alum cross bed tool box - BRIGHT	\$ 1,055	\$ 991.70
☐	96J	Retractable Weather Guard Tonneau (N/A 90B or 90P)	\$ 2,250	\$ 2,115.00
☐	96X	Hard Folding Weather Guard Tonneau Cover (N/A 90B or 90P)	\$ 1,280	\$ 1,203.20

FOR MORE EXTENSIVE TOWING NEEDS, PLEASE CONSULT THE FORD F-150 ORDER GUIDE

Dealer Added Options

☒		2 extra key fobs	\$ 596	\$ 560.24
☐				\$ -
☐				\$ -
☐				\$ -

Standard Colors:

Quantity

☐	UM	Agate Black Metallic		Quantity
☐	M7	Carbonized Gray Metallic		
☐	JS	Iconic Silver Metallic		
☒	YZ	Oxford White	8.00	

Option Availability and Compatibility Vary

USE THIS FORM AS A GUIDE

Please Return to your Deacon Jones Representative For Confirmation

Total Price Per Vehicle: \$ 43,870.01

Number Units This Spec: 8.00

Total this Order: \$ 350,960.08

Notes & Instructions:

Quote Date: 10/15/2025

Agency Information:

Agency Name: COUNTY OF UNION

Contact: MANDY JOYNER

Position: OFFICE SUPERVISOR

Address 1: 610 PATTON AVE

Address 2:

City, State, Zip: MONROE, NC 28110

Office Phone: 704-283-3893

Cell Phone:

Email: AMANDA.JOYNER@UNIONCOUNTYNC.GOV

Quoting Salesperson:

Name: Dianne Nelms

Phone: 910-214-2956

Email:



Deacon Jones 
Ford of Clinton

10/15/25
Reg 206

Line # 11

UC Water Exp
60026714



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-150 CREW CAB 5'5" BED

North Carolina Statewide Term Contract 2510A

Contract Term Dates: Feb 01, 2024 - Jan 31, 2029

COUNTY OF UNION

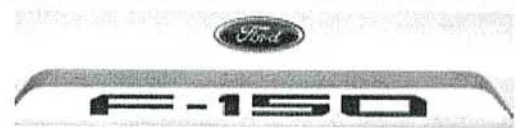
Standard Features - Subject to Change

2.7L V-6 Ecoboost Standard 3.5L V-6 Ecoboost & 5.0L V-8 Optional Electronic Shift on The Fly 4wd Actuation 23 Gallon Std Fuel Tank (36 Gallon Upgrade Avail) Manual Folding, Power Glass Mirrors w/ Heat 245/70R17 BSW All Season A/S (Std on RWD) 265/70R17 BSW All Terrain A/T (Std on 4wd) Class IV Trailer Hitch with 4/7 Pin Connector Black Vinyl Floor Covering Standard	Power Door Locks with Keyless Entry Std Power Windows 40/20/40 Cloth Bench Front Seat Standard Cruise Control Standard Wiper Activated Headlamps LED Reflector Headlamps Spare tire, Carrier, and Jack Standard Black Bumper and Grille Standard Front Tow Hooks (2) Standard
FORD Co-Pilot 360 2.0 BLIS with Cross-Traffic Alert Lane Keeping System Reverse Sensing, Reverse Brake Assist Pre Collision Assist with Auto Emergency Braking Auto Headlights with Auto High Beam	SYNC 4 with Enhanced Voice Recognition Apple Car Play & Android Auto Compatibility Wireless Phone Connection 1yr Connected Navigation Voice Command Recognition 12" LCD Touchscreen with Swipe Capability

Drivetrain Configurations

5.5 ft Bed	☐	W1K-101A	2026 Ford F-150 CREW CAB, 2WD, 5.5' Bed (2.7L V-6 STD)	\$ 38,489.57
145" WB	☒	W1L-101A	2026 Ford F-150 CREW CAB, 4WD, 5.5' Bed (2.7L V-6 STD)	\$ 42,078.37

Option Availability and Compatibility Vary
USE THIS FORM AS A GUIDE
Please Return to your Deacon Jones Representative For Confirmation



Popular Factory Options				
Code	Please Consult F-150 Order Guide for Add'l Options	MSRP	6% Disc	
Powertrain Options 5'5" Bed, 145" Wheel Base				
☒	99P 2.7L EcoBoost V-6 w/ Auto Start/Stop (Standard)	STD	STD	
☐	995 5.0L V-8 Engine (in Lieu of 2.7L EcoBoost)	\$ 2,340	\$ 2,199.60	
☐	998 3.5L EcoBoost V-6 (in Lieu of 2.7L EcoBoost)	\$ 2,220	\$ 2,086.80	
Packages				
☒	101A XL Base Trim Level	STD	STD	
☐	103A XL High Trim Level	\$ 1,195	\$ 1,123.30	
Interior Options				
☐	CS Cloth 40/20/40 Bench Front Seat	Standard	Standard	
☒	AS Vinyl 40/20/40 Bench Front Seat	N/C	N/C	
☐	76E Sirius/XM with 360L (3 Year Plan)	\$ 330	\$ 310.20	
☐	91P 8 Way Power Driver's Seat	\$ 350	\$ 329.00	
Exterior Options				
☒	153 Front License Plate Bracket	N/C	N/C	
☐	41H Engine Block Heater	\$ 190	\$ 178.60	
☒	18B Black Platform Running Boards	\$ 250	\$ 235.00	
☐	924 Fixed Rear Window Privacy Glass with Defroster	\$ 100	\$ 94.00	
☐	85H Back Up Alarm	\$ 235	\$ 220.90	
☐	942 Non Configurable Daytime Running Lights	\$ 45	\$ 42.30	
☒	413 Skid Plates (4wd Only)	\$ 160	\$ 150.40	
☐	T7C LT265/70R17C BSW A/T Tires (Light Truck Spec)	\$ 495	\$ 465.30	
☒	67T Integrated Trailer Brake Controller (2.7L V-6 ONLY)	\$ 275	\$ 258.50	
☐	53T Tow/Haul Package (5.0L V-8 & 3.5L V-6 EcoBoost Engine Only)	\$ 1,010	\$ 949.40	
Truck Bed Options				
☒	96W Tough Bed Spray In Bedliner	\$ 625	\$ 587.50	
☐	63T Tailgate Step with Work Surfaces	\$ 445	\$ 418.30	
☐	90B Weather Guard Alum cross bed tool box - MATTE BLACK	\$ 1,055	\$ 991.70	
☐	90P Weather Guard Alum cross bed tool box - BRIGHT	\$ 1,055	\$ 991.70	
☐	96J Retractable Weather Guard Tonneau (N/A 90B or 90P)	\$ 2,250	\$ 2,115.00	
☐	96X Hard Folding Weather Guard Tonneau Cover (N/A 90B or 90P)	\$ 1,280	\$ 1,203.20	
FOR MORE EXTENSIVE TOWING NEEDS, PLEASE CONSULT THE FORD F-150 ORDER GUIDE				
Dealer Added Options				
☒	2 extra key fobs	\$ 596	\$ 560.24	
☐			\$ -	
☐			\$ -	
☐			\$ -	
Standard Colors:				
☐	UM Agate Black Metallic			Quantity
☐	M7 Carbonized Gray Metallic			
☐	JS Iconic Silver Metallic			
☒	YZ Oxford White	8.00		
Option Availability and Compatibility Vary USE THIS FORM AS A GUIDE Please Return to your Deacon Jones Representative For Confirmation				

Total Price Per Vehicle: \$ 43,870.01

Number Units This Spec: 8.00

Total this Order: \$ 350,960.08

Notes & Instructions:

Quote Date: 10/15/2025

Agency Information:

Agency Name: COUNTY OF UNION

Contact: MANDY JOYNER

Position: OFFICE SUPERVISOR

Address 1: 610 PATTON AVE

Address 2:

City, State, Zip: MONROE, NC 28110

Office Phone: 704-283-3893

Cell Phone:

Email: AMANDA.JOYNER@UNIONCOUNTYNC.GOV

Quoting Salesperson:

Name: Dianne Nelms

Phone: 910-214-2956

Email:



Deacon Jones



Ford of Clinton

10/15/25
Reg 2066

Line # 12

UC Water Exp
60026813



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-150 CREW CAB 5'5" BED

North Carolina Statewide Term Contract 2510A

Contract Term Dates: Feb 01, 2024 - Jan 31, 2029

COUNTY OF UNION

Standard Features - Subject to Change

2.7L V-6 Ecoboost Standard
3.5L V-6 Ecoboost & 5.0L V-8 Optional
Electronic Shift on The Fly 4wd Actuation
23 Gallon Std Fuel Tank (36 Gallon Upgrade Avail)
Manual Folding, Power Glass Mirrors w/ Heat
245/70R17 BSW All Season A/S (Std on RWD)
265/70R17 BSW All Terrain A/T (Std on 4wd)
Class IV Trailer Hitch with 4/7 Pin Connector
Black Vinyl Floor Covering Standard

Power Door Locks with Keyless Entry Std
Power Windows
40/20/40 Cloth Bench Front Seat Standard
Cruise Control Standard
Wiper Activated Headlamps
LED Reflector Headlamps
Spare tire, Carrier, and Jack Standard
Black Bumper and Grille Standard
Front Tow Hooks (2) Standard

FORD Co-Pilot 360 2.0

BLIS with Cross-Traffic Alert
Lane Keeping System
Reverse Sensing, Reverse Brake Assist
Pre Collision Assist with Auto Emergency Braking
Auto Headlights with Auto High Beam

SYNC 4 with Enhanced Voice Recognition

Apple Car Play & Android Auto Compatibility
Wireless Phone Connection
1yr Connected Navigation
Voice Command Recognition
12" LCD Touchscreen with Swipe Capability

Drivetrain Configurations

5.5 ft Bed	☐	W1K-101A	2026 Ford F-150 CREW CAB, 2WD, 5.5' Bed (2.7L V-6 STD)	\$ 38,489.57
145" WB	☒	W1L-101A	2026 Ford F-150 CREW CAB, 4WD, 5.5' Bed (2.7L V-6 STD)	\$ 42,078.37

Option Availability and Compatibility Vary

USE THIS FORM AS A GUIDE

Please Return to your Deacon Jones Representative For Confirmation



F-150

Popular Factory Options				
Code	Please Consult F-150 Order Guide for Add'l Options	MSRP	6% Disc	
Powertrain Options 5'5" Bed, 145" Wheel Base				
☒	99P 2.7L Ecoboost V-6 w/ Auto Start/Stop (Standard)	STD	STD	
☐	995 5.0L V-8 Engine (in Lieu of 2.7L Ecoboost)	\$ 2,340	\$ 2,199.60	
☐	998 3.5L Ecoboost V-6 (in Lieu of 2.7L Ecoboost)	\$ 2,220	\$ 2,086.80	
Packages				
☒	101A XL Base Trim Level	STD	STD	
☐	103A XL High Trim Level	\$ 1,195	\$ 1,123.30	
Interior Options				
☐	CS Cloth 40/20/40 Bench Front Seat	Standard	Standard	
☒	AS Vinyl 40/20/40 Bench Front Seat	N/C	N/C	
☐	76E Sirius/XM with 360L (3 Year Plan)	\$ 330	\$ 310.20	
☐	91P 8 Way Power Driver's Seat	\$ 350	\$ 329.00	
Exterior Options				
☒	153 Front License Plate Bracket	N/C	N/C	
☐	41H Engine Block Heater	\$ 190	\$ 178.60	
☒	18B Black Platform Running Boards	\$ 250	\$ 235.00	
☐	924 Fixed Rear Window Privacy Glass with Defroster	\$ 100	\$ 94.00	
☐	85H Back Up Alarm	\$ 235	\$ 220.90	
☐	942 Non Configurable Daytime Running Lights	\$ 45	\$ 42.30	
☒	413 Skid Plates (4wd Only)	\$ 160	\$ 150.40	
☐	T7C LT265/70R17C BSW A/T Tires (Light Truck Spec)	\$ 495	\$ 465.30	
☒	67T Integrated Trailer Brake Controller (2.7L V-6 ONLY)	\$ 275	\$ 258.50	
☐	53T Tow/Haul Package (5.0L V-8 & 3.5L V-6 Ecoboost Engine Only)	\$ 1,010	\$ 949.40	
Truck Bed Options				
☒	96W Tough Bed Spray In Bedliner	\$ 625	\$ 587.50	
☐	63T Tailgate Step with Work Surfaces	\$ 445	\$ 418.30	
☐	90B Weather Guard Alum cross bed tool box - MATTE BLACK	\$ 1,055	\$ 991.70	
☐	90P Weather Guard Alum cross bed tool box - BRIGHT	\$ 1,055	\$ 991.70	
☐	96J Retractable Weather Guard Tonneau (N/A 90B or 90P)	\$ 2,250	\$ 2,115.00	
☐	96X Hard Folding Weather Guard Tonneau Cover (N/A 90B or 90P)	\$ 1,280	\$ 1,203.20	
FOR MORE EXTENSIVE TOWING NEEDS, PLEASE CONSULT THE FORD F-150 ORDER GUIDE				
Dealer Added Options				
☒	2 extra key fobs	\$ 596	\$ 560.24	
☐			\$ -	
☐			\$ -	
☐			\$ -	
Standard Colors:				
☐	UM Agate Black Metallic			Quantity
☐	M7 Carbonized Gray Metallic			
☐	JS Iconic Silver Metallic			
☒	YZ Oxford White			
			8.00	
Option Availability and Compatibility Vary USE THIS FORM AS A GUIDE Please Return to your Deacon Jones Representative For Confirmation				

Total Price Per Vehicle: \$ 43,870.01

Number Units This Spec: 8.00

Total this Order: \$ 350,960.08

Notes & Instructions:

Quote Date: 10/15/2025

Agency Information:

Agency Name: COUNTY OF UNION

Contact: MANDY JOYNER

Position: OFFICE SUPERVISOR

Address 1: 610 PATTON AVE

Address 2:

City, State, Zip: MONROE, NC 28110

Office Phone: 704-283-3893

Cell Phone:

Email: AMANDA.JOYNER@UNIONCOUNTYNC.GOV

Quoting Salesperson:

Name: Dianne Nelms

Phone: 910-214-2956

Email:



Deacon Jones



Ford of Clinton

10/15/25
Reg 266

Line # 13

UC Water Exp.
60026813



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-150 CREW CAB 5'5" BED

North Carolina Statewide Term Contract 2510A

Contract Term Dates: Feb 01, 2024 - Jan 31, 2029

COUNTY OF UNION

Standard Features - Subject to Change

2.7L V-6 Ecoboost Standard
3.5L V-6 Ecoboost & 5.0L V-8 Optional
Electronic Shift on The Fly 4wd Actuation
23 Gallon Std Fuel Tank (36 Gallon Upgrade Avail)
Manual Folding, Power Glass Mirrors w/ Heat
245/70R17 BSW All Season A/S (Std on RWD)
265/70R17 BSW All Terrain A/T (Std on 4wd)
Class IV Trailer Hitch with 4/7 Pin Connector
Black Vinyl Floor Covering Standard

Power Door Locks with Keyless Entry Std
Power Windows
40/20/40 Cloth Bench Front Seat Standard
Cruise Control Standard
Wiper Activated Headlamps
LED Reflector Headlamps
Spare tire, Carrier, and Jack Standard
Black Bumper and Grille Standard
Front Tow Hooks (2) Standard

FORD Co-Pilot 360 2.0
BLIS with Cross-Traffic Alert
Lane Keeping System
Reverse Sensing, Reverse Brake Assist
Pre Collision Assist with Auto Emergency Braking
Auto Headlights with Auto High Beam

SYNC 4 with Enhanced Voice Recognition
Apple Car Play & Android Auto Compatibility
Wireless Phone Connection
1yr Connected Navigation
Voice Command Recognition
12" LCD Touchscreen with Swipe Capability

Drivetrain Configurations

5.5 ft Bed	☐	W1K-101A	2026 Ford F-150 CREW CAB, 2WD, 5.5' Bed (2.7L V-6 STD)	\$ 38,489.57
145" WB	☒	W1L-101A	2026 Ford F-150 CREW CAB, 4WD, 5.5' Bed (2.7L V-6 STD)	\$ 42,078.37

Option Availability and Compatibility Vary

USE THIS FORM AS A GUIDE

Please Return to your Deacon Jones Representative For Confirmation



F-150

Popular Factory Options																								
Code	Please Consult F-150 Order Guide for Add'l Options	MSRP	6% Disc																					
Powertrain Options 5'5" Bed, 145" Wheel Base																								
☒	99P 2.7L EcoBoost V-6 w/ Auto Start/Stop (Standard)	STD	STD																					
☐	995 5.0L V-8 Engine (in Lieu of 2.7L EcoBoost)	\$ 2,340	\$ 2,199.60																					
☐	998 3.5L EcoBoost V-6 (in Lieu of 2.7L EcoBoost)	\$ 2,220	\$ 2,086.80																					
Packages																								
☒	101A XL Base Trim Level	STD	STD																					
☐	103A XL High Trim Level	\$ 1,195	\$ 1,123.30																					
Interior Options																								
☐	CS Cloth 40/20/40 Bench Front Seat	Standard	Standard																					
☒	AS Vinyl 40/20/40 Bench Front Seat	N/C	N/C																					
☐	76E Sirius/XM with 360L (3 Year Plan)	\$ 330	\$ 310.20																					
☐	91P 8 Way Power Driver's Seat	\$ 350	\$ 329.00																					
Exterior Options																								
☒	153 Front License Plate Bracket	N/C	N/C																					
☐	41H Engine Block Heater	\$ 190	\$ 178.60																					
☒	18B Black Platform Running Boards	\$ 250	\$ 235.00																					
☐	924 Fixed Rear Window Privacy Glass with Defroster	\$ 100	\$ 94.00																					
☐	85H Back Up Alarm	\$ 235	\$ 220.90																					
☐	942 Non Configurable Daytime Running Lights	\$ 45	\$ 42.30																					
☒	413 Skid Plates (4wd Only)	\$ 160	\$ 150.40																					
☐	T7C LT265/70R17C BSW A/T Tires (Light Truck Spec)	\$ 495	\$ 465.30																					
☒	67T Integrated Trailer Brake Controller (2.7L V-6 ONLY)	\$ 275	\$ 258.50																					
☐	53T Tow/Haul Package (5.0L V-8 & 3.5L V-6 EcoBoost Engine Only)	\$ 1,010	\$ 949.40																					
Truck Bed Options																								
☒	96W Tough Bed Spray In Bedliner	\$ 625	\$ 587.50																					
☐	63T Tailgate Step with Work Surfaces	\$ 445	\$ 418.30																					
☐	90B Weather Guard Alum cross bed tool box - MATTE BLACK	\$ 1,055	\$ 991.70																					
☐	90P Weather Guard Alum cross bed tool box - BRIGHT	\$ 1,055	\$ 991.70																					
☐	96J Retractable Weather Guard Tonneau (N/A 90B or 90P)	\$ 2,250	\$ 2,115.00																					
☐	96X Hard Folding Weather Guard Tonneau Cover (N/A 90B or 90P)	\$ 1,280	\$ 1,203.20																					
FOR MORE EXTENSIVE TOWING NEEDS, PLEASE CONSULT THE FORD F-150 ORDER GUIDE																								
Dealer Added Options																								
☒	2 extra key fobs	\$ 596	\$ 560.24																					
☐			\$ -																					
☐			\$ -																					
☐			\$ -																					
Standard Colors: <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 60%;"></th> <th style="width: 15%;"></th> <th style="width: 15%; text-align: center;">Quantity</th> </tr> </thead> <tbody> <tr> <td>☐</td> <td>UM Agate Black Metallic</td> <td></td> <td></td> </tr> <tr> <td>☐</td> <td>M7 Carbonized Gray Metallic</td> <td></td> <td></td> </tr> <tr> <td>☐</td> <td>JS Iconic Silver Metallic</td> <td></td> <td></td> </tr> <tr> <td>☒</td> <td>YZ Oxford White</td> <td></td> <td style="text-align: center;">8.00</td> </tr> </tbody> </table>								Quantity	☐	UM Agate Black Metallic			☐	M7 Carbonized Gray Metallic			☐	JS Iconic Silver Metallic			☒	YZ Oxford White		8.00
			Quantity																					
☐	UM Agate Black Metallic																							
☐	M7 Carbonized Gray Metallic																							
☐	JS Iconic Silver Metallic																							
☒	YZ Oxford White		8.00																					
Option Availability and Compatibility Vary USE THIS FORM AS A GUIDE Please Return to your Deacon Jones Representative For Confirmation																								

Total Price Per Vehicle: \$ 43,870.01

Number Units This Spec: 8.00

Total this Order: \$ 350,960.08

Notes & Instructions:

Quote Date: 10/15/2025

Agency Information:

Agency Name: COUNTY OF UNION

Contact: MANDY JOYNER

Position: OFFICE SUPERVISOR

Address 1: 610 PATTON AVE

Address 2:

City, State, Zip: MONROE, NC 28110

Office Phone: 704-283-3893

Cell Phone:

Email: AMANDA.JOYNER@UNIONCOUNTYNC.GOV

Quoting Salesperson:

Name: Dianne Nelms

Phone: 910-214-2956

Email:



Deacon Jones



Ford of Clinton

10/15/25
Reg 204

Line # 141

UC Water Exp.

00026813



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-150 CREW CAB 5'5" BED

North Carolina Statewide Term Contract 2510A

Contract Term Dates: Feb 01, 2024 - Jan 31, 2029

COUNTY OF UNION

Standard Features - Subject to Change

2.7L V-6 Ecoboost Standard
3.5L V-6 Ecoboost & 5.0L V-8 Optional
Electronic Shift on The Fly 4wd Actuation
23 Gallon Std Fuel Tank (36 Gallon Upgrade Avail)
Manual Folding, Power Glass Mirrors w/ Heat
245/70R17 BSW All Season A/S (Std on RWD)
265/70R17 BSW All Terrain A/T (Std on 4wd)
Class IV Trailer Hitch with 4/7 Pin Connector
Black Vinyl Floor Covering Standard

Power Door Locks with Keyless Entry Std
Power Windows
40/20/40 Cloth Bench Front Seat Standard
Cruise Control Standard
Wiper Activated Headlamps
LED Reflector Headlamps
Spare tire, Carrier, and Jack Standard
Black Bumper and Grille Standard
Front Tow Hooks (2) Standard

FORD Co-Pilot 360 2.0
BLIS with Cross-Traffic Alert
Lane Keeping System
Reverse Sensing, Reverse Brake Assist
Pre Collision Assist with Auto Emergency Braking
Auto Headlights with Auto High Beam

SYNC 4 with Enhanced Voice Recognition
Apple Car Play & Android Auto Compatibility
Wireless Phone Connection
1yr Connected Navigation
Voice Command Recognition
12" LCD Touchscreen with Swipe Capability

Drivetrain Configurations

5.5 ft Bed	☐	W1K-101A	2026 Ford F-150 CREW CAB, 2WD, 5.5' Bed (2.7L V-6 STD)	\$ 38,489.57
145" WB	☒	W1L-101A	2026 Ford F-150 CREW CAB, 4WD, 5.5' Bed (2.7L V-6 STD)	\$ 42,078.37

Option Availability and Compatibility Vary

USE THIS FORM AS A GUIDE

Please Return to your Deacon Jones Representative For Confirmation



F-150

Popular Factory Options

Code
Please Consult F-150 Order Guide for Add'l Options
MSRP
6% Disc

Powertrain Options 5'5" Bed, 145" Wheel Base

☒	99P	2.7L EcoBoost V-6 w/ Auto Start/Stop (Standard)	STD	STD
☐	995	5.0L V-8 Engine (in Lieu of 2.7L EcoBoost)	\$ 2,340	\$ 2,199.60
☐	998	3.5L EcoBoost V-6 (in Lieu of 2.7L EcoBoost)	\$ 2,220	\$ 2,086.80

Packages

☒	101A	XL Base Trim Level	STD	STD
☐	103A	XL High Trim Level	\$ 1,195	\$ 1,123.30

Interior Options

☐	CS	Cloth 40/20/40 Bench Front Seat	Standard	Standard
☒	AS	Vinyl 40/20/40 Bench Front Seat	N/C	N/C
☐	76E	Sirius/XM with 360L (3 Year Plan)	\$ 330	\$ 310.20
☐	91P	8 Way Power Driver's Seat	\$ 350	\$ 329.00

Exterior Options

☒	153	Front License Plate Bracket	N/C	N/C
☐	41H	Engine Block Heater	\$ 190	\$ 178.60
☒	18B	Black Platform Running Boards	\$ 250	\$ 235.00
☐	924	Fixed Rear Window Privacy Glass with Defroster	\$ 100	\$ 94.00
☐	85H	Back Up Alarm	\$ 235	\$ 220.90
☐	942	Non Configurable Daytime Running Lights	\$ 45	\$ 42.30
☒	413	Skid Plates (4wd Only)	\$ 160	\$ 150.40
☐	T7C	LT265/70R17C BSW A/T Tires (Light Truck Spec)	\$ 495	\$ 465.30
☒	67T	Integrated Trailer Brake Controller (2.7L V-6 ONLY)	\$ 275	\$ 258.50
☐	53T	Tow/Haul Package (5.0L V-8 & 3.5L V-6 EcoBoost Engine Only)	\$ 1,010	\$ 949.40

Truck Bed Options

☒	96W	Tough Bed Spray In Bedliner	\$ 625	\$ 587.50
☐	63T	Tailgate Step with Work Surfaces	\$ 445	\$ 418.30
☐	90B	Weather Guard Alum cross bed tool box - MATTE BLACK	\$ 1,055	\$ 991.70
☐	90P	Weather Guard Alum cross bed tool box - BRIGHT	\$ 1,055	\$ 991.70
☐	96J	Retractable Weather Guard Tonneau (N/A 90B or 90P)	\$ 2,250	\$ 2,115.00
☐	96X	Hard Folding Weather Guard Tonneau Cover (N/A 90B or 90P)	\$ 1,280	\$ 1,203.20

FOR MORE EXTENSIVE TOWING NEEDS, PLEASE CONSULT THE FORD F-150 ORDER GUIDE

Dealer Added Options

☒		2 extra key fobs	\$ 596	\$ 560.24
☐				\$ -
☐				\$ -
☐				\$ -

Standard Colors:

Quantity

☐	UM	Agate Black Metallic		Quantity
☐	M7	Carbonized Gray Metallic		
☐	JS	Iconic Silver Metallic		
☒	YZ	Oxford White	8.00	

Option Availability and Compatibility Vary

USE THIS FORM AS A GUIDE

Please Return to your Deacon Jones Representative For Confirmation

Total Price Per Vehicle: \$ 43,870.01

Number Units This Spec: 8.00

Total this Order: \$ 350,960.08

Notes & Instructions:

Quote Date: 10/15/2025

Agency Information:

Agency Name: COUNTY OF UNION

Contact: MANDY JOYNER

Position: OFFICE SUPERVISOR

Address 1: 610 PATTON AVE

Address 2:

City, State, Zip: MONROE, NC 28110

Office Phone: 704-283-3893

Cell Phone:

Email: AMANDA.JOYNER@UNIONCOUNTYNC.GOV

Quoting Salesperson:

Name: Dianne Nelms

Phone: 910-214-2956

Email: _____



Deacon Jones



Ford of Clinton

10/15/25
Reg 2106

Unit # 15

UC Water Exp
60026514



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-150 CREW CAB 5'5" BED

North Carolina Statewide Term Contract 2510A

Contract Term Dates: Feb 01, 2024 - Jan 31, 2029

COUNTY OF UNION

Standard Features - Subject to Change

2.7L V-6 Ecoboost Standard
3.5L V-6 Ecoboost & 5.0L V-8 Optional
Electronic Shift on The Fly 4wd Actuation
23 Gallon Std Fuel Tank (36 Gallon Upgrade Avail)
Manual Folding, Power Glass Mirrors w/ Heat
245/70R17 BSW All Season A/S (Std on RWD)
265/70R17 BSW All Terrain A/T (Std on 4wd)
Class IV Trailer Hitch with 4/7 Pin Connector
Black Vinyl Floor Covering Standard

Power Door Locks with Keyless Entry Std
Power Windows
40/20/40 Cloth Bench Front Seat Standard
Cruise Control Standard
Wiper Activated Headlamps
LED Reflector Headlamps
Spare tire, Carrier, and Jack Standard
Black Bumper and Grille Standard
Front Tow Hooks (2) Standard

FORD Co-Pilot 360 2.0
BLIS with Cross-Traffic Alert
Lane Keeping System
Reverse Sensing, Reverse Brake Assist
Pre Collision Assist with Auto Emergency Braking
Auto Headlights with Auto High Beam

SYNC 4 with Enhanced Voice Recognition
Apple Car Play & Android Auto Compatibility
Wireless Phone Connection
1yr Connected Navigation
Voice Command Recognition
12" LCD Touchscreen with Swipe Capability

Drivetrain Configurations

5.5 ft Bed	☐	W1K-101A	2026 Ford F-150 CREW CAB, 2WD, 5.5' Bed (2.7L V-6 STD)	\$ 38,489.57
145" WB	☒	W1L-101A	2026 Ford F-150 CREW CAB, 4WD, 5.5' Bed (2.7L V-6 STD)	\$ 42,078.37

Option Availability and Compatibility Vary
USE THIS FORM AS A GUIDE
Please Return to your Deacon Jones Representative For Confirmation



Popular Factory Options

Code
Please Consult F-150 Order Guide for Add'l Options
MSRP
6% Disc

Powertrain Options 5'5" Bed, 145" Wheel Base

☒	99P	2.7L EcoBoost V-6 w/ Auto Start/Stop (Standard)	STD	STD
☐	995	5.0L V-8 Engine (in Lieu of 2.7L EcoBoost)	\$ 2,340	\$ 2,199.60
☐	998	3.5L EcoBoost V-6 (in Lieu of 2.7L EcoBoost)	\$ 2,220	\$ 2,086.80

Packages

☒	101A	XL Base Trim Level	STD	STD
☐	103A	XL High Trim Level	\$ 1,195	\$ 1,123.30

Interior Options

☐	CS	Cloth 40/20/40 Bench Front Seat	Standard	Standard
☒	AS	Vinyl 40/20/40 Bench Front Seat	N/C	N/C
☐	76E	Sirius/XM with 360L (3 Year Plan)	\$ 330	\$ 310.20
☐	91P	8 Way Power Driver's Seat	\$ 350	\$ 329.00

Exterior Options

☒	153	Front License Plate Bracket	N/C	N/C
☐	41H	Engine Block Heater	\$ 190	\$ 178.60
☒	18B	Black Platform Running Boards	\$ 250	\$ 235.00
☐	924	Fixed Rear Window Privacy Glass with Defroster	\$ 100	\$ 94.00
☐	85H	Back Up Alarm	\$ 235	\$ 220.90
☐	942	Non Configurable Daytime Running Lights	\$ 45	\$ 42.30
☒	413	Skid Plates (4wd Only)	\$ 160	\$ 150.40
☐	T7C	LT265/70R17C BSW A/T Tires (Light Truck Spec)	\$ 495	\$ 465.30
☒	67T	Integrated Trailer Brake Controller (2.7L V-6 ONLY)	\$ 275	\$ 258.50
☐	53T	Tow/Haul Package (5.0L V-8 & 3.5L V-6 EcoBoost Engine Only)	\$ 1,010	\$ 949.40

Truck Bed Options

☒	96W	Tough Bed Spray In Bedliner	\$ 625	\$ 587.50
☐	63T	Tailgate Step with Work Surfaces	\$ 445	\$ 418.30
☐	90B	Weather Guard Alum cross bed tool box - MATTE BLACK	\$ 1,055	\$ 991.70
☐	90P	Weather Guard Alum cross bed tool box - BRIGHT	\$ 1,055	\$ 991.70
☐	96J	Retractable Weather Guard Tonneau (N/A 90B or 90P)	\$ 2,250	\$ 2,115.00
☐	96X	Hard Folding Weather Guard Tonneau Cover (N/A 90B or 90P)	\$ 1,280	\$ 1,203.20

FOR MORE EXTENSIVE TOWING NEEDS, PLEASE CONSULT THE FORD F-150 ORDER GUIDE

Dealer Added Options

☒		2 extra key fobs	\$ 596	\$ 560.24
☐				\$ -
☐				\$ -
☐				\$ -

Standard Colors:

Quantity

☐	UM	Agate Black Metallic	
☐	M7	Carbonized Gray Metallic	
☐	JS	Iconic Silver Metallic	
☒	YZ	Oxford White	8.00

Quantity

Option Availability and Compatibility Vary

USE THIS FORM AS A GUIDE

Please Return to your Deacon Jones Representative For Confirmation

Total Price Per Vehicle: \$ 43,870.01

Number Units This Spec: 8.00

Total this Order: \$ 350,960.08

Notes & Instructions:

Quote Date: 10/15/2025

Agency Information:

Agency Name: COUNTY OF UNION

Contact: MANDY JOYNER

Position: OFFICE SUPERVISOR

Address 1: 610 PATTON AVE

Address 2:

City, State, Zip: MONROE, NC 28110

Office Phone: 704-283-3893

Cell Phone:

Email: AMANDA.JOYNER@UNIONCOUNTYNC.GOV

Quoting Salesperson:

Name: Dianne Nelms

Phone: 910-214-2956

Email:



Deacon Jones 
Ford of Clinton

10/15/25

Reg 216

Line #116

LLC WATER EXP

60026514



Deacon Jones
AUTO GROUP FLEET SALES

Deacon Jones Ford of Clinton



2026 Ford F-150 CREW CAB 5'5" BED

North Carolina Statewide Term Contract 2510A

Contract Term Dates: Feb 01, 2024 - Jan 31, 2029

COUNTY OF UNION

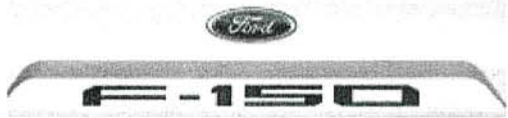
Standard Features - Subject to Change

2.7L V-6 Ecoboost Standard 3.5L V-6 Ecoboost & 5.0L V-8 Optional Electronic Shift on The Fly 4wd Actuation 23 Gallon Std Fuel Tank (36 Gallon Upgrade Avail) Manual Folding, Power Glass Mirrors w/ Heat 245/70R17 BSW All Season A/S (Std on RWD) 265/70R17 BSW All Terrain A/T (Std on 4wd) Class IV Trailer Hitch with 4/7 Pin Connector Black Vinyl Floor Covering Standard	Power Door Locks with Keyless Entry Std Power Windows 40/20/40 Cloth Bench Front Seat Standard Cruise Control Standard Wiper Activated Headlamps LED Reflector Headlamps Spare tire, Carrier, and Jack Standard Black Bumper and Grille Standard Front Tow Hooks (2) Standard
FORD Co-Pilot 360 2.0 BLIS with Cross-Traffic Alert Lane Keeping System Reverse Sensing, Reverse Brake Assist Pre Collision Assist with Auto Emergency Braking Auto Headlights with Auto High Beam	SYNC 4 with Enhanced Voice Recognition Apple Car Play & Android Auto Compatibility Wireless Phone Connection 1yr Connected Navigation Voice Command Recognition 12" LCD Touchscreen with Swipe Capability

Drivetrain Configurations

5.5 ft Bed	☐	W1K-101A	2026 Ford F-150 CREW CAB, 2WD, 5.5' Bed (2.7L V-6 STD)	\$ 38,489.57
145" WB	☒	W1L-101A	2026 Ford F-150 CREW CAB, 4WD, 5.5' Bed (2.7L V-6 STD)	\$ 42,078.37

Option Availability and Compatibility Vary
USE THIS FORM AS A GUIDE
 Please Return to your Deacon Jones Representative For Confirmation



Popular Factory Options

Code

Please Consult F-150 Order Guide for Add'l Options

MSRP

6% Disc

Powertrain Options 5'5" Bed, 145" Wheel Base

☒	99P	2.7L EcoBoost V-6 w/ Auto Start/Stop (Standard)	STD	STD
☐	995	5.0L V-8 Engine (in Lieu of 2.7L EcoBoost)	\$ 2,340	\$ 2,199.60
☐	998	3.5L EcoBoost V-6 (in Lieu of 2.7L EcoBoost)	\$ 2,220	\$ 2,086.80

Packages

☒	101A	XL Base Trim Level	STD	STD
☐	103A	XL High Trim Level	\$ 1,195	\$ 1,123.30

Interior Options

☐	CS	Cloth 40/20/40 Bench Front Seat	Standard	Standard
☒	AS	Vinyl 40/20/40 Bench Front Seat	N/C	N/C
☐	76E	Sirius/XM with 360L (3 Year Plan)	\$ 330	\$ 310.20
☐	91P	8 Way Power Driver's Seat	\$ 350	\$ 329.00

Exterior Options

☒	153	Front License Plate Bracket	N/C	N/C
☐	41H	Engine Block Heater	\$ 190	\$ 178.60
☒	18B	Black Platform Running Boards	\$ 250	\$ 235.00
☐	924	Fixed Rear Window Privacy Glass with Defroster	\$ 100	\$ 94.00
☐	85H	Back Up Alarm	\$ 235	\$ 220.90
☐	942	Non Configurable Daytime Running Lights	\$ 45	\$ 42.30
☒	413	Skid Plates (4wd Only)	\$ 160	\$ 150.40
☐	T7C	LT265/70R17C BSW A/T Tires (Light Truck Spec)	\$ 495	\$ 465.30
☒	67T	Integrated Trailer Brake Controller (2.7L V-6 ONLY)	\$ 275	\$ 258.50
☐	53T	Tow/Haul Package (5.0L V-8 & 3.5L V-6 EcoBoost Engine Only)	\$ 1,010	\$ 949.40

Truck Bed Options

☒	96W	Tough Bed Spray In Bedliner	\$ 625	\$ 587.50
☐	63T	Tailgate Step with Work Surfaces	\$ 445	\$ 418.30
☐	90B	Weather Guard Alum cross bed tool box - MATTE BLACK	\$ 1,055	\$ 991.70
☐	90P	Weather Guard Alum cross bed tool box - BRIGHT	\$ 1,055	\$ 991.70
☐	96J	Retractable Weather Guard Tonneau (N/A 90B or 90P)	\$ 2,250	\$ 2,115.00
☐	96X	Hard Folding Weather Guard Tonneau Cover (N/A 90B or 90P)	\$ 1,280	\$ 1,203.20

FOR MORE EXTENSIVE TOWING NEEDS, PLEASE CONSULT THE FORD F-150 ORDER GUIDE

Dealer Added Options

☒		2 extra key fobs	\$ 596	\$ 560.24
☐				\$ -
☐				\$ -
☐				\$ -

Standard Colors:

Quantity

☐	UM	Agate Black Metallic		
☐	M7	Carbonized Gray Metallic		
☐	JS	Iconic Silver Metallic		
☒	YZ	Oxford White		8.00

Quantity

Option Availability and Compatibility Vary

USE THIS FORM AS A GUIDE

Please Return to your Deacon Jones Representative For Confirmation

Total Price Per Vehicle: \$ 43,870.01

Number Units This Spec: 8.00

Total this Order: \$ 350,960.08

Notes & Instructions:

Quote Date: 10/15/2025

Agency Information:

Agency Name: COUNTY OF UNION

Contact: MANDY JOYNER

Position: OFFICE SUPERVISOR

Address 1: 610 PATTON AVE

Address 2:

City, State, Zip: MONROE, NC 28110

Office Phone: 704-283-3893

Cell Phone:

Email: AMANDA.JOYNER@UNIONCOUNTYNC.GOV

Quoting Salesperson:

Name: Dianne Nelms

Phone: 910-214-2956

Email:



Deacon Jones



Ford of Clinton



Union County, NC

Staff Report

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

File #: 25-700

Agenda Date: 11/17/2025

TITLE:

Bid Award and Construction Contract - Union County Progress Building Backup Generator

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Award contract to Hinson Electric, Inc. in the amount of \$481,800.00; 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; and 3) adopt Resolution Providing Notice of Construction of the Union County Progress Building Backup Generator.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The project scope entails providing and installing a backup generator to provide full building backup power in the event of an emergency or during the loss of normal utility power. The backup generator will help ensure essential services can continue to be provided in the event of a loss of power to the Progress Building.

On September 16, 2025, the Procurement and Contract Management Department partnered with the Facilities and Fleet Management Department to issue IFB 2026-024. On October 15, 2025, eight (8) bids for the titled project were received and processed. The bids were tabulated, reviewed and certified by Progressive Architecture and Engineering, P.C. The bids ranged from \$448,800.00 - \$1,095,600.00; staff recommend that the project be awarded to the lowest responsive, responsible bidder acknowledging all required forms in their bid submission, Hinson Electric, Inc., in the amount of \$481,800.00.

FINANCIAL IMPACT:

The cost to execute this contract is \$481,800.00. There are sufficient finds in capital account number 40080209 to cover this expense.

UNION COUNTY, NORTH CAROLINA

**Union County Progress Building Backup Generator
IFB 2026-024**

ADVERTISEMENT FOR BIDS

Sealed Bids for Union County Progress Building Backup Generator will be **received by Union County Procurement and Contract Management**, 610 Patton Avenue, Monroe, North Carolina 28110 **until 2:00 PM local time on October 15, 2025**, at which time the Bids received will be publicly opened and read. Late bids will not be accepted.

If a Bid is sent by mail or other delivery system, the sealed envelope containing the Bid shall be enclosed in a separate package plainly marked on the outside with the notation **"BID ENCLOSED – 2026-024"** and shall be addressed to Union County Procurement and Contract Management, Attn: Juan Rodriguez-Cruz, 610 Patton Avenue, Monroe, NC 28110.

A Non-Mandatory Pre-Bid meeting will be held on **September 29, 2025, at 10:00 AM** local time at the Union County Progress Building, 1407 Airport Road, Monroe, NC 28110. Attendance at this meeting is strongly encouraged.

Scope of Work: Design and install a backup generator and peripheral equipment such as an automatic transfer switch (ATS) to provide full backup supply during loss of normal utility power. The strategy for full backup will consist of resupplying the existing main distribution panels from a new ATS connected to both normal and backup power. The exiting circuits being fed from the existing main distribution panels will remain as is. In addition, Union County desires to include the ability to connect a temporary generator to the electrical system in the event the backup generator is unavailable to provide backup power (maintenance, etc.). Therefore, a manual transfer switch docking station will be included in the design.

The Work includes coordinating with Union County Facilities and Fleet Management for access, security, and shutdowns.

Bids will be received for a single prime Contract. Bids shall be on a lump sum basis as set forth in the Bid Form.

All questions about the meaning or intent of the Bidding Documents are to be submitted in writing to the Procurement contact person listed on the cover page (Juan.Rodriguez-Cruz@unioncountync.gov). Deadline for questions is 5:00 PM local time on October 02, 2025. Questions will be addressed via Addenda no later than 7 days prior to bid date.

The Issuing Office for the Bidding Documents is:

Name of Issuing Office: Progressive Companies
1801 North Graham Street
Charlotte, NC 28206
Contact Name: Dane Stivers
Contact E-mail Address: Dstivers@weareprogressive.com
Contact Phone: (704) 731-8088

Prospective Bidders may examine the Bidding Documents at Union County Procurement and Contract Management at 610 Patton Avenue, Monroe, North Carolina on Mondays through Fridays between the hours of 8:00 AM and 5:00 PM and may obtain copies of the Bidding Documents from the Issuing Office as described below.

Progressive Companies		IFB 2026-024
96520008	1	Union County Progress Building Backup Generator
100% Construction Documents August 20 2025	00 11 13	Union County Progress Building Backup Generator

Bidding Documents are available in electronic or printed form from Duncan-Parnell via their bid room <https://www.bidroom.duncan-parnell.com> Registration with Duncan-Parnell is required to obtain the bid documents. There is no charge for registration. Printed hard copies of the Bidding Documents can be ordered and shipped for an additional fee, which will depend on the number of sets, size of Drawings, applicable taxes, and shipping method selected by the prospective Bidder. The approximate costs of the Bidding Documents and shipping are non-refundable, and are as follows:

- Download (PDF) \$132.00 plus tax
- Printed Set and Digital Set \$99.00 plus tax

Partial sets of Bidding Documents will not be available from the Issuing Office. Neither Owner nor Engineer will be responsible for full or partial sets of Bidding Documents, including Addenda if any, obtained from sources other than the Issuing Office or Duncan-Parnell.

Bidders must have a license to do work as a contractor in the State of North Carolina, as set forth under Article 1 chapter 87 of the North Carolina General statutes. The bidder's North Carolina Contractor license number shall be designated on the outside of the sealed envelope containing the Bid.

Bidders are required to provide a non-collusion affidavit, as set forth in the bidding documents.

As provided by statute, a deposit of cash, cashier's check or certified check on some bank or trust company insured by the Federal Deposit insurance Company, or a bid bond executed by corporate surety licensed under the laws of North Carolina to execute such bonds in the amount of 5% of the bid must accompany each bid. The payee shall be "**Union County**". Said deposit shall guarantee that the Agreement will be entered into by the successful bidder if award is made. Such deposit may be held by Union County until the successful bidder has executed and delivered all required Contract documents to Union County.

Union County reserves the right to reject any or all bids, including without limitation, nonconforming, nonresponsive, unbalanced, or conditional Bids. Owner further reserve the right to reject the Bid and Bidder whom they find, after reasonable inquiry and evaluation, to not be responsible. Owner may also reject the Bid and Bidder if the Owner believes that it would not be in the best interest of the Project to make an award to that Bidder. Owner also reserves the right to waive all informalities and technicalities not involving price, time, or changes in the Work and to negotiate, as allowed by law, contract terms with the Successful Bidder.

Union County encourages good faith effort outreach as described in the Union County MBE and Small business Outreach Plan. Compliance with Union County Minority and Small Business Guidelines and Outreach Plan goals apply. **Bidders shall submit a completed identification of Minority Participation form and either an Affidavit A or Affidavit B, as applicable along with their Bid.**

END OF DOCUMENT 00 11 13

Progressive Companies		IFB 2026-024
96520008	2	Union County Progress Building Backup Generator
100% Construction Documents August 20 2025	00 11 13	Union County Progress Building Backup Generator



Invitation for Bid No. 2026-024

**Union County Progress Building Backup
Generator**

.....

ADDENDUM No. 1

ISSUE DATE: October 08, 2025

Responding Offerors on this project are hereby notified that this Addendum shall be made a part of the above named IFB document.

The following items add to, modify, and/or clarify the IFB documents and shall have the full force and effect of the original Documents. This Addendum shall be acknowledged by the Offeror in the IFB document.

PROJECT MANUAL – 100% CONSTRUCTION DOCUMENTS**DIVISION 00 – PROCUREMENT AND CONTRACTING REQUIREMENTS**

00 01 01	Project Title Page
00 01 07	Seals Page
00 01 10	Table of Contents
00 01 15	List of Drawing Sheets
00 11 13	Advertisement for Bids
00 11 16	Invitation to Bid
00 21 00	Instructions to Bidders
00 25 00	Pre-Bid Meetings
00 41 13	Bid Form – Stipulated Sum
00 43 13	Bid Security Form
00 43 28	Tax Rebate Form
00 43 39.13	Guidelines for Recruitment and Selection of Minority Business
00 45 19	Non-Collusion Affidavit
00 45 36	Equal Opportunity Employment Affidavit
00 45 39	MBE Provisions Affidavit
00 52 00	Agreement Forms
00 54 00	Notice of Intent to Award
00 55 00	Notice to Proceed
00 61 00	Bond Forms
00 62 00	Certificate of Insurance
00 72 00	General Conditions of the Contract for Construction
00 91 13	Addenda

DIVISION 01 – GENERAL REQUIREMENTS

01 10 00	Summary
01 23 00	Alternates
01 26 00	Contract Modifications Procedures
01 29 00	Payment Procedures
01 31 00	Project Management and Coordination
01 32 00	Construction Progress Documentation
01 33 00	Submittal Procedures
01 40 00	Quality Requirements
01 42 00	References
01 50 00	Temporary Facilities and Controls
01 60 00	Product Requirements
01 73 00	Execution
01 73 29	Cutting and Patching
01 74 19	Construction Waste Management and Disposal
01 77 00	Closeout Procedures
01 78 23	Operation and Maintenance Data
01 78 39	Project Record Documents
01 79 00	Demonstration and Training

DIVISION 02 – EXISTING CONDITIONS

02 41 13	Selective Site Demo
----------	---------------------

Progressive Companies		IFB 2026-024
96520008	1	Union County Progress Building Backup Generator
100% Construction Documents August 20 2025	00 01 10	Union County Progress Building Backup Generator

DIVISION 23 – HEATING, VENTILATING, AND AIR-CONDITIONING (HVAC)

- 23 05 53 Identification For HVAC Piping And Equipment
- 23 11 23 Facility Natural-Gas Piping

DIVISION 26 – ELECTRICAL

- 26 05 05 Selective Demolition For Electrical
- 26 05 19 Low-Voltage Electrical Power Conductors And Cables
- 26 05 26 Grounding And Bonding For Electrical Systems
- 26 05 29 Hangers And Support For Electrical Systems
- 26 05 33.13 Conduit For Electrical Systems
- 26 05 33.16 Boxes For Electrical Systems
- 26 05 53 Identification For Electrical Systems
- 26 05 73 Power System Studies
- 26 05 83 Wiring Connections
- 26 08 01 Electrical Inspection, Testing And Start-Up
- 26 24 16 Panelboards
- 26 27 26 Wiring Devices
- 26 32 13 Engine Generators
- 26 36 00 Transfer Switches
- 26 43 00 Surge Protective Devices
- 26 56 00 Exterior Lighting

DIVISION 31 – EARTHWORK

- 31 10 00 Site Clearing
- 31 20 00 Earthwork
- 31 25 00 Erosion Control

DIVISION 32 – EXTERIOR IMPROVEMENTS

- 32 12 16 Asphalt Pavement
- 32 17 00 Pavement Markings, Signs And Specialties
- 32 92 00 Lawns And Grasses
- 32 93 00 Exterior Plants

DIVISION 33 – UTILITIES

- 33 10 00 Exterior Water Systems
- 33 41 00 Storm Drainage

END OF TABLE OF CONTENTS

Progressive Companies		IFB 2026-024
96520008	2	Union County Progress Building Backup Generator
100% Construction Documents August 20 2025	00 01 10	Union County Progress Building Backup Generator

Union County Progress Building**Backup Generator**Project No.: **IFB 2026-024**Issue to: **Bidders****Union County, Owner**Contract Document Date: **August 20, 2025**Addendum Date: **October 08, 2025****A. NOTICE TO BIDDER**

- 1.1 This Addendum is issued pursuant to the Conditions of the Contract and is hereby made part of the Contract Documents. The addendum serves to clarify, revise, and supersede information in the Project Manual, the Drawings, and previously issued Addenda. The Bidder shall acknowledge receipt of this Addendum in the appropriate space on the Bid Form. Failure to do so may subject the Bidder to disqualification. A list of attachments, if any, is part of this document.
- 1.2 Acknowledge receipt of this Addendum in the space provided in the Bid Form. Failure to do so may disqualify the Bidder.
- 1.3 The date for receipt of bids for this project **is unchanged by this Addendum**. Sealed Bids for Union County Progress Building Backup Generator will be **received by the Union County Procurement Department until 2:00 PM local time on October 15, 2025** at Union County Procurement and Contract Management, 610 Patton Avenue, Monroe, NC 28110.
- 1.4 All questions about the meaning or intent of the Bidding Documents are to be submitted in writing to the Procurement contact person listed on the cover page (**Juan.Rodriguez-Cruz@unioncountync.gov**). **Deadline for questions is 5:00 PM local time on October 02, 2025**. Questions will be addressed via Addenda no later than seven calendar days prior to the date for receipt of bids. All addenda and any associated contract document revisions will be posted to the following websites: Union County, NC State IPS, Duncan Parnell Planroom.

B. QUESTION AND ANSWER SECTION

1. **1.** Please provide an attendance/bidders list from the pre-bid conference.

Answer:

See section E. Attachments

2. Can project materials for the interior work be securely stored in the facility (eg, Conduit, conductors/wire, panel assemblies, etc.)

Answer:**Yes**

3. Please advise as to the disposition of the "Building Mounted Service Tropher" as it is shown as solid on the Existing Electrical One Line similar to the tropher feeding Main#1 and Main #2 but it does not appear on the New Electric one line as the tropher feeding the mains does.

Answer:

All dashed lines including the building mounted service troffer are dashed, which indicated demolition. So, it does not exist in the proposed new layout. The intent is to remove the five existing service feeders and feed a new ATS with one new feeder

4. Will an alternate MTS manufacturer be allowed in the interest of project schedule as the specified Trystar MTS has a lead time of 8 – 9 months?

Progressive Companies		IFB 2026-024
96520008	1	Union County Progress Building Backup Generator
100% Construction Documents August 20 2025	00 91 13	Union County Progress Building Backup Generator

Answer:

Alternate submittals are allowed and approved by the EOR.

5. Will existing conduits be abandoned in place or removed when the new circuitry is installed?

Answer:

Removed

6. Will the project engineer permit the current drawing set to be submitted to Monroe city for permit issuance?

Answer:

The project engineer will be responsible for submission to the city for permits.

7. Is there an erosion and sedimentation control permit in place for the site? If yes, will this project be incorporated by refence or if not, will the successful bidder be responsible for permitting the "aggregate disturbance"?

Answer:

The area of the disturbance is not anticipated to require erosion and sedimentation control permitting

8. Are there any earthwork requirements beyond limits of generator slabs?

Answer:

Contractor is responsible for earthwork requirements for installation of natural gas and electrical work as well.

9. What is the new slab depth in existing grade?

Answer:

6" minimum

10. Are there any erosion control requirements?

Answer:

The area of the disturbance is not anticipated to require erosion and sedimentation control or permitting.

11. Does the existing generator need to maintain operation until new generator is operational?

Answer:

Yes

12. Where will generator need to be transported to?

Answer:

Old generator stays on site, needs to be moved into the warehouse to be placed on GovDeals

13. Is Nema 1 acceptable in lieu of 3R for indoor enclosure?

Answer:

Yes

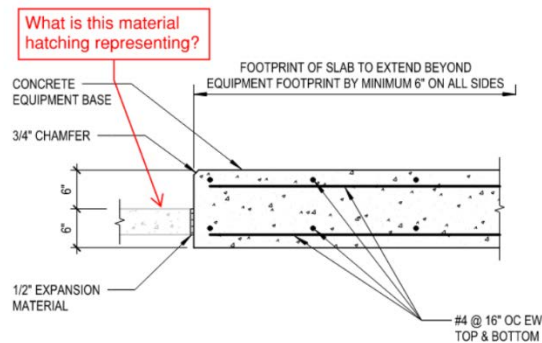
Progressive Companies		IFB 2026-024
96520008	2	Union County Progress Building Backup Generator
100% Construction Documents August 20 2025	00 91 13	Union County Progress Building Backup Generator

14. Who is the point of contact for scheduling a site visit?

Answer:

Eric.Simpson@unioncountync.gov

15. What is intended by Detail 2 on sheet EP101? It appears that there is concrete adjacent to the equipment slab that is not depicted in plan view. See picture below for more information.



2 TYPICAL ON GRADE EQUIPMENT BASE
NOT TO SCALE

Answer:

The hatching represents earth (grade)

16. After our site visit, we noticed the exiting pad mounted transformer was leaning pretty bad. We were wondering if while we had to be working in that transformer anyway for the new switchboard if a new PAD and leveling would need to be included in the scope of work for this project.

Answer:

No, a new pad or leveling of the current pad will not be needed

C. MODIFICATIONS TO DRAWINGS

1.5 The following changes were made to drawing page E501, Electrical One-Line Diagrams, on 10/03/2025

- Generator NEMA 3X changed to NEMA 3R
- Temporary Gen Set Connection (MTS) NEMA 4X Enclosure changed to NEMA 3R Enclosure
- ATS NEMA 3R changed to NEMA 1

D. MODIFICATIONS TO SPECIFICATIONS

1.6 Update to Section 00 01 10 "Table of Content" to include Section 00 91 13 "Addenda"

Progressive Companies		IFB 2026-024
96520008	3	Union County Progress Building Backup Generator
100% Construction Documents August 20 2025	00 91 13	Union County Progress Building Backup Generator

E. ATTACHMENTS

1.7 Sign-in Sheet from Pre-Bid meeting.

END OF ADDENDUM

Progressive Companies		IFB 2026-024
96520008	4	Union County Progress Building Backup Generator
100% Construction Documents August 20 2025	00 91 13	Union County Progress Building Backup Generator



UNIONCOUNTY
north carolina

Non-Mandatory Pre-Bid Conference & Site Visit
IFB 2026-024 Union County Progress Building Backup Generator
Union County Progress Building 1407 Airport Road Monroe, NC 28110
September 29, 2025 10:00 AM

Name	Company Name	Email Address	Phone Number
Greg Dill	PHSE Power Systems, Inc	greg@psysystems.com	(704) 864-7390
Jessica Evans	Carriek Contracting	Jevans@carriekcontracting.com	704 213 4430
Austin Lerner	Harper GC	ALerner@HarperGC.com	910-751-0119
Zach Johnson	Nixon Power	Zjohnson@nixonpower.com	413-618-0344
Dan Missell	RKY Boat LRP	d@danmissell@lrcdot.com	864-640 7860
Dave Stivers	Progressive Companies	dstivers@weareprogressive.com	630-310-1694
Eric Simpson	Union County	eric.simpson@unioncountync.gov	704-238-7768



Bid Opening Tabulation
Union County, North Carolina
IFB 2026-024 Union County Progress Building Backup Generator
Procurement Conference Room, 610 Patton Ave, Monroe, NC
October 15, 2025 2:00 PM

Bids Opened and Recorded by Juan Rodriguez-Cruz 10/15/2025

Company Name	NC Contractor License No.	Non-Collusion Affidavit Received? (Yes/No)	Bid Bond/Deposit (5%) Received? (Yes/No)	Minority Participation Form & Affidavit A/B Received? (Yes/No)	Addenda Acknowledgement	Bid Total
Krydon Grouyp (1st)	X	No	X	No	X	\$448,800.00
Khalid Davis Electric	X	Yes	X	Yes	X	\$737,793.10
Carrick Contracting Corporation	X	Yes	X	Yes	X	\$546,200.00
Recore	X	Yes	X	Yes	X	\$559,242.20
Stelco Electric LLC (3rd)	X	Yes	X	Yes	X	\$482,900.00
Harper General Contrators	X	Yes	X	Yes	X	\$1,095,600.00
Page Power Systems	X	No	X	No		\$544,729.90
Hinson Electric (2nd)	X	Yes	X	Yes	X	\$481,800.00



This item has been electronically signed and sealed by Dane A. Stivers using a Digital Signature and date. Printed copies of this document are not considered signed and sealed and the signature must be verified on any electronic copies.



October 21, 2025

Eric Simpson
Facilities Project Manager
Union County Government, Facilities Management
1407 Airport Road
Monroe, NC 28110

Re: Recommendation for Award of Union County Progress Building Backup Generator
IFB 2026-024

Mr. Simpson:

On October 15, 2025, at 2:00 PM bids were received and opened for the Union County Progress Building Backup Generator at Procurement Conference Room, 610 Patton Ave, Monroe, NC. Eight (8) bids were received. The lowest bid received was in the amount \$448,800.00 from The Krydon Group. Due to not submitting Minority Participation Form & Affidavit A/B, under N.C. Gen. Stat. § 143-128.2(c), these forms are required to be submitted with the bid. As a result, we will need to reject this bid and move to the next lowest responsive bidder. The next apparent low bidder acknowledging all required affidavits and addenda was Hinson Electric. Hinson Electric's bid was for \$481,800.00. It is our recommendation to move forward with awarding the contract for the Progress Building Backup Generator project to Hinson Electric.

As always, feel free to contact me with any questions or comments.

Sincerely,

Dane Stivers, P.E.
Progressive Companies

BID INFORMATIONName of Bidder: Hanson Electric IncDate: 10-15-2025

Project Name: Union County Progress Building Backup Generator

Owner: Union County, North Carolina

Owner Project Number: IFB 2026-024

Designer: Progressive Companies

Designer Project Number: 96520008

CERTIFICATIONS OF BASE BID

The undersigned Bidder hereby declares that he has carefully investigated the scope of work and having thoroughly familiarized himself with the Contract Documents relative hereto and has read all special provisions furnished prior to the opening of the bids; that he has satisfied himself relative to the work to be performed. The bidder further declares that he and his subcontractors have fully complied with NCGS 64, Article 2 in regard to E-Verification as required by N.C. General Statute 143-129(j). The bidder agrees to hold the proposed bid price for 90 days.

The bidder proposes and agrees if this proposal is accepted, to contract with Union County Government, in the form of contract specified, to provide all necessary labor, equipment, materials, machinery, tools, apparatus, transportation, services, fees, permits, etc., to complete the construction of Union County **Progress Building Backup Generator** all in accordance with the aforementioned Contract Documents to the full and entire satisfaction of Union County Government, with definite understanding that no money will be allowed for extra work except as set forth in the General Conditions and the Contract Documents for the lump sum of:

Provide 10% of the base bid price as an Owner contingency allowance and provide a Total Base Bid Price. Any funds not used from this allowance will be returned to the Owner by deduct change order.

A) BASE BID PRICE:

FOUR HUNDRED THIRTY EIGHT THOUSAND Dollars (\$ 438,000.⁰⁰).

B) OWNERS CONTINGENCY:

FOURTY THREE THOUSAND EIGHT HUNDRED Dollars (\$ 43,800.⁰⁰).

C) TOTAL BASE BID PRICE WITH OWNER CONTINGENCY (A+B=C):

FOUR HUNDRED EIGHTY ONE THOUSAND Dollars (\$ 481,800.⁰⁰).

EIGHT HUNDRED

Progressive Companies		IFB 2026-024
96520008	1	Union County Progress Building Backup Generator
100% Construction Documents August 20 2025	00 41 13	Union County Progress Building Backup Generator

SUB-CONTRACTOR LIST:

The following shall execute subcontracts with the Bidder for the portion of the work indicated (if in the scope of work):

Specialty Work Sub-Contractor (Name & License No.):

_____ License No. _____

Specialty Work Sub-Contractor (Name & License No.):

_____ License No. _____

Specialty Work Sub-Contractor (Name & License No.):

_____ License No. _____

Specialty Work Sub-Contractor (Name & License No.):

_____ License No. _____

TIME OF COMPLETION

The undersigned Bidder proposes and agrees hereby to commence the Work of the Contract Documents on a date specified in a written Notice to Proceed to be issued by Owner and shall fully complete the Work within **One Hundred Ninety-Three [193] calendar days**.

LIQUIDATED DAMAGES:

The undersigned further agrees, stipulates, and fixes as Liquidated Damages if delayed, but not as a penalty, the sum of **Five Hundred Dollars [\$500.00]** per calendar day that the undersigned together with the undersigned's surety shall pay the Owner for each calendar day or part thereof that expires after the date specified for the substantial completion of the work and until the Work is Substantially complete. By bidding, the undersigned hereby agrees to be responsible for liquidated damages.

BID SECURITY:

Accompanying this proposal is a bid security five percent (5%) of the Total Bid Price Sum in accordance with Instructions to Bidders in the form of (check one):

☒ Bid Bond (AIA Document A310-2010), or

☐ Cash, or

☐ Cashier's Check, or Certified Check.

Progressive Companies		IFB 2026-024
96520008	2	Union County Progress Building Backup Generator
100% Construction Documents August 20 2025	00 41 13	Union County Progress Building Backup Generator

RECIEPT OF ADDENDA:

The undersigned acknowledges receipt of the following addenda which will be considered as part of the contract Documents:

Addendum No. 1 Dated 10-8-2025 Addendum No. _____ Dated _____

Addendum No. _____ Dated _____ Addendum No. _____ Dated _____

Addendum No. _____ Dated _____ Addendum No. _____ Dated _____

CONTRACTOR'S LICENSE:

The undersigned further states that it is a duly licensed contractor for the proposed work in the State of North Carolina, and that all fees, permits, etc. pursuant to submitting this proposal have been paid in full.

ACKNOWLEDGEMENT AND REPRESENTATIONS:

If notice of acceptance of this bid is given to the undersigned within 90 days after the date of opening of bids, or any time thereafter before this bid is withdrawn, the undersigned will execute and deliver an Agreement in the prescribed form promptly after it has been presented to him for signature. Certificates of Insurance and Performance and Payment bonds shall be furnished to the Owner at the execution of this agreement and as required by North Carolina General Statutes.

Upon request of the Owner, the undersigned bidder agrees to submit evidence in affidavit form of applicable experience, adequate financial resources, work in hand capacity, adequate organization, and acceptable past performance. Submittal will be in the form of AIA Document A305 Contractor's Qualification Statement. Bidder's qualifications information shall be considered confidential.

The undersigned bidder certifies that neither he/she, nor any official, agent or employee has entered into any agreement, participated in any collusion, or otherwise taken any action which is in restraint of free competitive bidding in conjunction with this bid. The person signing this bid form represents that he/she has full authority and representative capacity to execute this Bid Form in the capacity indicated below.

The undersigned agrees that in the case of failure on his part to execute the said contract and the bond within ten (10) consecutive calendar days after written notice being given of the award of contract, the certified check, cash or bid bond accompanying this bid shall be paid into the funds of the Owner's account set aside for the Project, as liquidated damages for such failure; otherwise, the certified check, cash or bid bond accompanying the Proposal shall be returned to the undersigned.

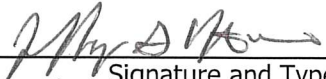
The undersigned bidder agrees that they are expected to act as Project Expediter and coordinate work of all other contractors.

The firm signing this bid and registered under that name is legally qualified to perform all work included in the scope of the contract as determined by the State of North Carolina, in granting the registration.

Progressive Companies		IFB 2026-024
96520008	3	Union County Progress Building Backup Generator
100% Construction Documents August 20 2025	00 41 13	Union County Progress Building Backup Generator

PROPOSAL SIGNATURE:Respectfully submitted this 15TH day of OCTOBER, 2025.HINSON ELECTRIC INC.

(Name of firm or corporation making bid)

By:  Jeffrey G Hinson
Signature and Typed NameTitle: PRESIDENTAddress of Bidder: 2200 STAFFORD ST EXT
MONROE NC 28110Email Address: GMUNDS@HINSONELECTRICINC.COMBidders N.C. Contractor License No. 6897-UType of License: UNLIMITEDLimitations: NONE

Attest:

By: Title: ESTIMATOR

END OF DOCUMENT 00 41 13

Progressive Companies		IFB 2026-024
96520008	4	Union County Progress Building Backup Generator
100% Construction Documents August 20 2025	00 41 13	Union County Progress Building Backup Generator



GREAT AMERICAN INSURANCE COMPANY

OHIO

BID BOND

Any singular reference to Contractor, Surety, Owner or other party shall be considered plural where applicable.

CONTRACTOR:

(Name, legal status and address)

Hinson Electric, Inc.
2200 Stafford Street Extension
Monroe, NC 28110

SURETY:

(Name, legal status and principal place of business):

Great American Insurance Company
301 E. 4th Street
Cincinnati, OH 45202

OWNER:

(Name, legal status and address)

Union County
610 Patton Avenue
Monroe, NC 28110

BOND AMOUNT: \$ AN AMOUNT EQUAL TO FIVE PERCENT OF PRINCIPAL'S BID - - - (5% OF BID)

PROJECT:

(Name, location or address, and Project number, if any)

Union County Progress Building Backup Generator
Bid No. 2026-024

The Contractor and Surety are bound to the Owner in the amount set forth above, for the payment of which the Contractor and Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, as provided herein. The conditions of this Bond are such that if the Owner accepts the bid of the Contractor within the time specified in the bid documents, or within such time period as may be agreed to by the Owner and Contractor, and the Contractor either (1) enters into a contract with the Owner in accordance with the terms of such bid, and gives such bond or bonds as may be specified in the bidding or Contract Documents, with a Surety admitted in the jurisdiction of the Project and otherwise acceptable to the Owner, for the faithful performance of such Contract and for the prompt payment of labor and material furnished in the prosecution thereof; or (2) pays to the Owner the difference, not to exceed the amount of this Bond, between the amount specified in said bid and such larger amount for which the Owner may in good faith contract with another party to perform the work covered by said bid, then this obligation shall be null and void, otherwise to remain in full force and effect. The Surety hereby waives any notice of an agreement between the Owner and Contractor to extend the time in which the Owner may accept the bid. Waiver of notice by the Surety shall not apply to any extension exceeding sixty (60) days in the aggregate beyond the time for acceptance of bids specified in the bid documents, and the Owner and Contractor shall obtain the Surety's consent for an extension beyond sixty (60) days.

If this Bond is issued in connection with a subcontractor's bid to a Contractor, the term Contractor in this Bond shall be deemed to be Subcontractor and the term Owner shall be deemed to be Contractor.

When this Bond has been furnished to comply with a statutory or other legal requirement in the location of the Project, any provision in this Bond conflicting with said statutory or legal requirement shall be deemed deleted herefrom and provisions conforming to such statutory or other legal requirements shall be deemed incorporated herein. When so furnished, the intent is that this Bond shall be construed as a statutory bond and not as a common law bond.

Signed and sealed this 15th day of October, 2025.

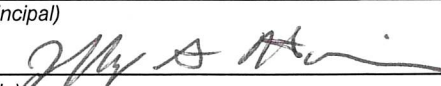

(Witness)


(Witness)

Hinson Electric, Inc.

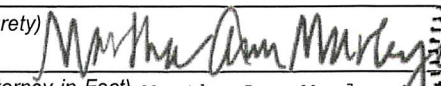
(Principal)

(Seal)


(Title) Jeffery G. Hinson, President

GREAT AMERICAN INSURANCE COMPANY

(Surety)


(Attorney-in-Fact) Martha Ann Marley Long

GREAT AMERICAN INSURANCE COMPANY®

Administrative Office: 301 E 4TH STREET • CINCINNATI, OHIO 45202 • 513-369-5000 • FAX 513-723-2740

The number of persons authorized by
this power of attorney is not more than TWO

No. 0 15081

POWER OF ATTORNEY

KNOW ALL MEN BY THESE PRESENTS: That the GREAT AMERICAN INSURANCE COMPANY, a corporation organized and existing under and by virtue of the laws of the State of Ohio, does hereby nominate, constitute and appoint the person or persons named below, each individually if more than one is named, its true and lawful attorney-in-fact, for it and in its name, place and stead to execute on behalf of the said Company, as surety, any and all bonds, undertakings and contracts of suretyship, or other written obligations in the nature thereof; provided that the liability of the said Company on any such bond, undertaking or contract of suretyship executed under this authority shall not exceed the limit stated below.

Name
MARTHA ANN MARLEY LONG
VONDA A. RENTZ

Address
MOORESVILLE, NC
NEESES, SC

Limit of Power
UNLIMITED
UNLIMITED

This Power of Attorney revokes all previous powers issued on behalf of the attorney(s)-in-fact named above.

IN WITNESS WHEREOF the GREAT AMERICAN INSURANCE COMPANY has caused these presents to be signed and attested by its appropriate officers and its corporate seal hereunto affixed this 29TH day of JULY, 2025.

GREAT AMERICAN INSURANCE COMPANY



My L C. B.

Assistant Secretary

[Signature]

Divisional Senior Vice President

STATE OF OHIO, COUNTY OF HAMILTON - ss:

JOHN K. WEBSTER (877-377-2405)

On this 29TH day of JULY, 2025, before me personally appeared JOHN K. WEBSTER, to me known, being duly sworn, deposes and says that he resides in Cincinnati, Ohio, that he is a Divisional Senior Vice President of the Bond Division of Great American Insurance Company, the Company described in and which executed the above instrument; that he knows the seal of the said Company; that the seal affixed to the said instrument is such corporate seal; that it was so affixed by authority of his office under the By-Laws of said Company, and that he signed his name thereto by like authority.



SUSAN A KOHORST
Notary Public
State of Ohio
My Comm. Expires
May 18, 2030

Susan A Kohorst

This Power of Attorney is granted by authority of the following resolutions adopted by the Board of Directors of Great American Insurance Company by unanimous written consent dated June 9, 2008.

RESOLVED: That the Divisional President, the several Divisional Senior Vice Presidents, Divisional Vice Presidents and Divisional Assistant Vice Presidents, or any one of them, be and hereby is authorized, from time to time, to appoint one or more Attorneys-in-Fact to execute on behalf of the Company, as surety, any and all bonds, undertakings and contracts of suretyship, or other written obligations in the nature thereof; to prescribe their respective duties and the respective limits of their authority; and to revoke any such appointment at any time.

RESOLVED FURTHER: That the Company seal and the signature of any of the aforesaid officers and any Secretary or Assistant Secretary of the Company may be affixed by facsimile to any power of attorney or certificate of either given for the execution of any bond, undertaking, contract of suretyship, or other written obligation in the nature thereof, such signature and seal when so used being hereby adopted by the Company as the original signature of such officer and the original seal of the Company, to be valid and binding upon the Company with the same force and effect as though manually affixed.

CERTIFICATION

I, STEPHEN C. BERAHA, Assistant Secretary of Great American Insurance Company, do hereby certify that the foregoing Power of Attorney and the Resolutions of the Board of Directors of June 9, 2008 have not been revoked and are now in full force and effect.

Signed and sealed this 15th day of October, 2025



My L C. B.

Assistant Secretary



Attach to Bid Attach to Bid Attach to Bid Attach to Bid Attach to Bid Attach to Bid Attach to Bid Attach to Bid

State of North Carolina --AFFIDAVIT B-- Intent to Perform Contract with Own Workforce.

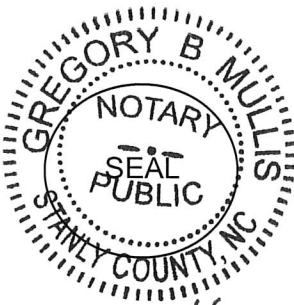
County of UnionAffidavit of Hinson Electric Inc
(Name of Bidder)

I hereby certify that it is our intent to perform 100% of the work required for the _____
Union County Progress Building Backup Generator contract.
(Name of Project)

In making this certification, the Bidder states that the Bidder does not customarily subcontract elements of this type project, and normally performs and has the capability to perform and will perform all elements of the work on this project with his/her own current work forces; and

The Bidder agrees to provide any additional information or documentation requested by the owner in support of the above statement. The Bidder agrees to make a Good Faith Effort to utilize minority suppliers where possible.

The undersigned hereby certifies that he or she has read this certification and is authorized to bind the Bidder to the commitments herein contained.

Date: 10-15-2025 Name of Authorized Officer: Jeffrey G HinsonSignature: [Signature]Title: PresidentState of NC, County of STANLEYSubscribed and sworn to before me this 15th day of October 2025Notary Public Gregory B MullisMy commission expires 5-28-29

Progressive Companies		IFB 2026-024
96520008	4	Union County Progress Building Backup Generator
100% Construction Documents August 20 2025	00 45 39	Union County Progress Building Backup Generator

DRAFT AIA® Document A101® – 2017

Standard Form of Agreement Between Owner and Contractor where the basis of payment is a Stipulated Sum

AGREEMENT made as of the « » day of « » in the year « »
(In words, indicate day, month and year.)

BETWEEN the Owner:
(Name, legal status, address and other information)

«Union County, North Carolina »« »
«500 N. Main Street »
«Monroe, NC 28112 »
« »

and the Contractor:
(Name, legal status, address and other information)

« »« »
« »
« »
« »

for the following Project:
(Name, location and detailed description)

«Union County Progress Building Backup Generator »
«1407 Airport Road »
«Monroe, NC 28110 »

The Architect:
(Name, legal status, address and other information)

«Progressive Architecture Engineering, P.C. »« »
«1801 North Graham Street »
«Charlotte, NC 28206 »
« »

The Owner and Contractor agree as follows.

ADDITIONS AND DELETIONS:
The author of this document has added information needed for its completion. The author may also have revised the text of the original AIA standard form. An *Additions and Deletions Report* that notes added information as well as revisions to the standard form text is available from the author and should be reviewed.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

The parties should complete A101®-2017, Exhibit A, Insurance and Bonds, contemporaneously with this Agreement. AIA Document A201®-2017, General Conditions of the Contract for Construction, is adopted in this document by reference. Do not use with other general conditions unless this document is modified.

ELECTRONIC COPYING of any portion of this AIA® Document to another electronic file is prohibited and constitutes a violation of copyright laws as set forth in the footer of this document.

TABLE OF ARTICLES

- 1 THE CONTRACT DOCUMENTS
- 2 THE WORK OF THIS CONTRACT
- 3 DATE OF COMMENCEMENT AND SUBSTANTIAL COMPLETION
- 4 CONTRACT SUM
- 5 PAYMENTS
- 6 DISPUTE RESOLUTION
- 7 TERMINATION OR SUSPENSION
- 8 MISCELLANEOUS PROVISIONS
- 9 ENUMERATION OF CONTRACT DOCUMENTS

EXHIBIT A INSURANCE AND BONDS

ARTICLE 1 THE CONTRACT DOCUMENTS

The Contract Documents consist of this Agreement, Conditions of the Contract (General, Supplementary, and other Conditions), Drawings, Specifications, Addenda issued prior to execution of this Agreement, other documents listed in [Article 9](#) of this Agreement, and Modifications issued after execution of this Agreement, all of which form the Contract, and are as fully a part of the Contract as if attached to this Agreement or repeated herein. The Contract represents the entire and integrated agreement between the parties hereto and supersedes prior negotiations, representations, or agreements, either written or oral. An enumeration of the Contract Documents, other than a Modification, appears in Article 9.

ARTICLE 2 THE WORK OF THIS CONTRACT

The Contractor shall fully execute the Work described in the Contract Documents [or reasonably inferable by the Contractor as necessary to produce the results intended by the Contract Documents](#), except as specifically indicated in the Contract Documents to be the responsibility of others. [Except as expressly provided for in the Contract Documents to the contrary, the Contractor at its sole cost, risk, and expense shall construct, equip, provide, purchase, pay for, and furnish all of the Work in accordance with the Contract Documents and governmental codes and regulations as they apply to performance of the Work.](#)

ARTICLE 3 DATE OF COMMENCEMENT AND SUBSTANTIAL COMPLETION

§ 3.1 The date of commencement of the Work shall be:

(Check one of the following boxes.)

☐ [« »] The date of this Agreement.

☒ [« X »] A date set forth in a notice to proceed issued by the Owner.

☐ [« »] Established as follows:

(Insert a date or a means to determine the date of commencement of the Work.)

« »

If a date of commencement of the Work is not selected, then the date of commencement shall be the date of this Agreement.

§ 3.2 The Contract Time shall be measured from the date of commencement of the Work.

§ 3.3 Substantial Completion

AIA Document A101® – 2017. Copyright © 1915, 1918, 1925, 1937, 1951, 1958, 1961, 1963, 1967, 1974, 1977, 1987, 1991, 1997, 2007 and 2017 by The American Institute of Architects. All rights reserved. The "American Institute of Architects," "AIA," the AIA Logo, "A101," and "AIA Contract Documents" are registered trademarks and may not be used without permission. This draft was produced by AIA software at 09:34:48 ET on 08/05/2021 under Order No.1289669003 which expires on 07/07/2022, is not for resale, is licensed for one-time use only, and may only be used in accordance with the AIA Contract Documents® Terms of Service. To report copyright violations, e-mail copyright@aia.org.
User Notes: (1463044461)

§ 3.3.1 Subject to adjustments of the Contract Time as provided in the Contract Documents, the Contractor shall achieve Substantial Completion of the entire Work:

(Check one of the following boxes and complete the necessary information.)

[☒] Not later than «One Hundred Ninety-Three» («193») calendar days from the date of commencement of the Work.

[☐] By the following date: « »

§ 3.3.2 Subject to adjustments of the Contract Time as provided in the Contract Documents, if portions of the Work are to be completed prior to Substantial Completion of the entire Work, the Contractor shall achieve Substantial Completion of such portions by the following dates:

Portion of Work	Substantial Completion Date

§ 3.3.3 If the Contractor fails to achieve Substantial Completion as provided in this Section 3.3, liquidated damages, if any, shall be assessed as set forth in Section 4.5.

ARTICLE 4 CONTRACT SUM

§ 4.1 The Owner shall pay the Contractor the Contract Sum in current funds for the Contractor's performance of the Contract. The Contract Sum shall be «Four Hundred eighty-one thousand, eight hundred dollars» (\$ «481,800.00»), subject to additions and deductions as provided in the Contract Documents.

§ 4.2 Alternates

§ 4.2.1 Alternates, if any, included in the Contract Sum:

Item	Price

§ 4.2.2 Subject to the conditions noted below, the following alternates may be accepted by the Owner following execution of this Agreement. Upon acceptance, the Owner shall issue a Modification to this Agreement. (Insert below each alternate and the conditions that must be met for the Owner to accept the alternate.)

Item	Price	Conditions for Acceptance

§ 4.3 Allowances, if any, included in the Contract Sum: (Identify each allowance.)

Item	Price

§ 4.4 Unit prices, if any:

(Identify the item and state the unit price and quantity limitations, if any, to which the unit price will be applicable.)

Item	Units and Limitations	Price per Unit (\$0.00)

Unit prices are considered complete and include (i) all materials, equipment, labor, delivery, installation, overhead, and profit; and (ii) any other costs or expenses in connection with, or incidental to, the performance of that portion of the Work to which such unit prices apply.

§ 4.5 Liquidated damages, if any:

(Insert terms and conditions for liquidated damages, if any.)

§ 4.5.1 The Contractor acknowledges and recognizes that the Owner is entitled to full and beneficial occupancy and use of the completed Work following expiration of the Contract Time and that the Owner has relied on the Contractor's duty to achieve Substantial Completion of the Work within the Contract Time. The Contractor further acknowledges and agrees that if the Contractor fails to cause the Substantial Completion of any portion of the Work within the Contract Time, the Owner will sustain extensive damages and serious loss as a result of such failure. The exact amount of such damages will be extremely difficult to ascertain. Therefore, the Owner and the Contractor agree as set forth in this Section 4.5.

§ 4.5.2 If the Contractor fails to achieve Substantial Completion of the Work within the Contract Time, the Owner shall be entitled to retain or recover from the Contractor, as liquidated damages and not as a penalty, the amount of Five Hundred Dollars (\$500.00) per day, commencing upon the first day following expiration of the Contract Time and continuing until the date that the Contractor achieves Substantial Completion of the entire Work. Such liquidated damages are hereby agreed to be a reasonable pre-estimate of damages the Owner will incur as a result of delayed completion of the Work.

§ 4.5.3 The Owner may deduct liquidated damages described in Subsection 4.5.2 from any unpaid amounts then or thereafter due the Contractor under the Contract Documents, as provided herein and otherwise in the Contract Documents. Any liquidated damages not so deducted from any unpaid amount due the Contractor shall be payable by the Contractor to the Owner together with interest from the date of the demand at the highest interest rate allowed by applicable law.

§ 4.5.4 Notwithstanding anything to the contrary in the Contract Documents, if the Owner is unable to recover any portion of liquidated damages in accordance with the terms and conditions of Section 4.5 because any portion of Section 4.5 is found to be unenforceable or invalid as a penalty or otherwise, then the Owner shall be entitled to recover from the Contractor all of the Owner's actual damages in connection with any failure by the Contractor to achieve Substantial Completion of the Work within the Contract Time, including, without limitation, consequential damages. «—»

§ 4.6 Other:

(Insert provisions for bonus or other incentives, if any, that might result in a change to the Contract Sum.)

« Notwithstanding anything herein to the contrary, the amount expended under this Contract shall not exceed the Contract Sum set forth in Section 4.1 without the execution of a Modification. »

ARTICLE 5 PAYMENTS

§ 5.1 Progress Payments

§ 5.1.1 Based upon Applications for Payment submitted to the Architect by the Contractor and Certificates for Payment issued by the Architect, the Owner shall make progress payments on account of the Contract Sum to the Contractor as provided below and elsewhere in the Contract Documents.

§ 5.1.2 The period covered by each Application for Payment shall be one calendar month ending on the last day of the month, or as follows:

« »

§ 5.1.3 Provided that an Application for Payment is received by the Architect not later than the « 5th » day of a month, the Owner shall make payment of the amount certified to the Contractor not later than the « 15th » day of the « following » month. If an Application for Payment is received by the Architect after the application date fixed above, payment of the amount certified shall be made by the Owner not later than « forty-five » (« 45 ») days after the Architect receives the Application for Payment.

(Federal, state or local laws may require payment within a certain period of time.)

§ 5.1.4 Each Application for Payment shall be based on the most recent schedule of values submitted by the Contractor in accordance with the Contract Documents. The schedule of values shall allocate the entire Contract Sum among the various portions of the Work. The schedule of values shall be prepared in such form, and supported by such data to substantiate its accuracy, as the Architect may require. This schedule of values shall be used as a basis for reviewing the Contractor's Applications for Payment.

§ 5.1.5 Applications for Payment shall show the percentage of completion of each portion of the Work as of the end of the period covered by the Application for Payment.

§ 5.1.6 In accordance with AIA Document A201™–2017, General Conditions of the Contract for Construction, and subject to other provisions of the Contract Documents, the amount of each progress payment shall be computed as follows:

§ 5.1.6.1 The amount of each progress payment shall first include:

- .1 That portion of the Contract Sum properly allocable to completed Work;
- .2 That portion of the Contract Sum properly allocable to materials and equipment delivered and suitably stored at the site for subsequent incorporation in the completed construction, or, if approved in advance by the Owner, suitably stored off the site at a location agreed upon in writing; and
- .3 That portion of Construction Change Directives that the Architect determines, in the Architect's professional judgment, to be reasonably justified.

§ 5.1.6.2 The amount of each progress payment shall then be reduced by:

- .1 The aggregate of any amounts previously paid by the Owner;
- .2 The amount, if any, for Work that remains uncorrected and for which the Architect has previously withheld a Certificate for Payment as provided in Article 9 of AIA Document A201–2017;
- .3 Any amount for which the Contractor does not intend to pay a Subcontractor or material supplier, unless the Work has been performed by others the Contractor intends to pay;
- .4 For Work performed or defects discovered since the last payment application, any amount for which the Architect may withhold payment, or nullify a Certificate of Payment in whole or in part, as provided in Article 9 of AIA Document A201–2017; and
- .5 Retainage withheld pursuant to Section 5.1.7.

§ 5.1.7 Retainage

§ 5.1.7.1 For each progress payment made prior to Substantial Completion of the Work, the Owner may withhold ~~the following amount, as retainage, from the payment otherwise due~~ retainage as set forth in Section 5.1.7:

(Insert a percentage or amount to be withheld as retainage from each Application for Payment. The amount of retainage may be limited by governing law.)

« The Owner shall make progress payments on account of the Contract Price on the basis of the Contractor's Applications for Payment as recommended by the Architect monthly. Until the Work is fifty percent (50%) completed, retainage will be five percent (5%) of any progress payment due to the Contractor. The Work shall be deemed fifty percent (50%) complete when the Contractor's gross project invoices, excluding the value of materials stored off-site, equal or exceed fifty percent (50%) of the value of the Contract, except the value of materials stored on-site shall not exceed twenty percent (20%) of the Contractor's gross project invoices for the purpose of determining whether the Work is fifty percent (50%) complete. »

~~§ 5.1.7.1.1 The following items are not subject to retainage:~~

~~*(Insert any items not subject to the withholding of retainage, such as general conditions, insurance, etc.)*~~

«»

§ 5.1.7.2 Reduction or limitation of retainage, if any, shall be as follows:

(If the retainage established in Section 5.1.7.1 is to be modified prior to Substantial Completion of the entire Work, including modifications for Substantial Completion of portions of the Work as provided in Section 3.3.2, insert provisions for such modifications.)

« When the Work is fifty percent (50%) complete, and if the Contractor continues to perform satisfactorily and any nonconforming Work identified and noticed prior to that time by the Architect or the Owner has been corrected by the Contractor and accepted by the Architect and the Owner, no further retainage shall be retained from progress payments due to the Contractor. However, following fifty percent (50%) completion of the Work, the Owner may withhold additional retainage from a subsequent progress payment, not to exceed five percent (5%) in order to allow the Owner to retain two and one-half percent (2.5%) total retainage through the completion of the Work. Subsequent to reducing retainage, the full retainage of payments authorized (up to five percent (5%) of each

subsequent progress payment application) may be reinstated if the Owner determines the Contractor's performance is unsatisfactory. »

§ 5.1.7.3 Except as set forth in this Section 5.1.7.3, upon Substantial Completion of the Work, the Contractor may submit an Application for Payment that includes the retainage withheld from prior Applications for Payment pursuant to this Section 5.1.7. The Application for Payment submitted at Substantial Completion shall not include retainage as follows:

(Insert any other conditions for release of retainage upon Substantial Completion.)

« The Owner may retain sufficient funds to secure completion of the Work or correction of any of the Work. If the Owner retain such funds, the amount retained shall not exceed two and one-half (2 ½) times the estimated value of the Work remaining to be completed or corrected. »

§ 5.1.8 If final completion of the Work is materially delayed through no fault of the Contractor, the Owner shall pay the Contractor any additional amounts in accordance with Article 9 of AIA Document A201–2017.

§ 5.1.9 Except with the Owner's prior approval, the Contractor shall not make advance payments to suppliers for materials or equipment which have not been delivered and stored at the site.

§ 5.1.10 Consent of the Surety shall be obtained before any retainage is paid by the Owner. Consent of the Surety, signed by an agent, must be accompanied by a certified copy of such agent's authority to act for the Surety.

§ 5.2 Final Payment

§ 5.2.1 Final payment, constituting the entire unpaid balance of the Contract Sum, shall be made by the Owner to the Contractor when

- .1 the Contractor has fully performed the Contract except for the Contractor's responsibility to correct Work as provided in Article 12 of AIA Document A201–2017, and to satisfy other requirements, if any, which extend beyond final payment; and
- .2 a final Certificate for Payment has been issued by the Architect.

§ 5.2.2 The Owner's final payment to the Contractor shall be made no later than 30-45 days after the issuance of the Architect's final Certificate for Payment, or as follows:

« »

§ 5.3 Interest

Payments due and unpaid under the Contract shall bear interest from the date payment is due at the rate stated below, or in the absence thereof, at the legal rate prevailing from time to time at the place where the Project is located.

(Insert rate of interest agreed upon, if any.)

« 12 » % « per annum, or the minimum rate allowed by applicable law, if less, for such time as interest may accrue and no more. »

ARTICLE 6 DISPUTE RESOLUTION

§ 6.1 Initial Decision Maker

The Architect will serve as the Initial Decision Maker pursuant to Article 15 of AIA Document A201–2017, unless the parties appoint below another individual, not a party to this Agreement, to serve as the Initial Decision Maker.

(If the parties mutually agree, insert the name, address and other contact information of the Initial Decision Maker, if other than the Architect.)

« »

« »

« »

« »

§ 6.2 Binding Dispute Resolution

For any Claim subject to, but not resolved by, mediation pursuant to Article 15 of AIA Document A201–2017, the method of binding dispute resolution shall be as follows:

(Check the appropriate box.)

☐ Arbitration pursuant to Section 15.4 of AIA Document A201–2017

☒ Litigation in a court of competent jurisdiction

☐ Other (Specify)

« »

If the Owner and Contractor do not select a method of binding dispute resolution, or do not subsequently agree in writing to a binding dispute resolution method other than litigation, Claims will be resolved by litigation in a court of competent jurisdiction.

ARTICLE 7 TERMINATION OR SUSPENSION

§ 7.1 The Contract may be terminated by the Owner or the Contractor as provided in Article 14 of AIA Document A201–2017.

§ 7.1.1 If the Contract is terminated for the Owner's convenience in accordance with Article 14 of AIA Document A201–2017, then the Owner shall pay the Contractor a termination fee as follows:

(Insert the amount of, or method for determining, the fee, if any, payable to the Contractor following a termination for the Owner's convenience.)

« N/A (No termination fee) »

§ 7.2 The Work may be suspended by the Owner as provided in Article 14 of AIA Document A201–2017.

ARTICLE 8 MISCELLANEOUS PROVISIONS

§ 8.1 Where reference is made in this Agreement to a provision of AIA Document A201–2017 or another Contract Document, the reference refers to that provision as amended or supplemented by other provisions of the Contract Documents.

§ 8.2 The Owner's representative:

(Name, address, email address, and other information)

« Chris Boyd, Director »

« Union County Facilities and Fleet Management »

1407 Airport Road

« Monroe, NC 28110 »

« »

« »

« »

§ 8.3 The Contractor's representative:

(Name, address, email address, and other information)

« »

« »

« »

« »

« »

« »

§ 8.4 Neither the Owner's nor the Contractor's representative shall be changed without ten days' prior notice to the other party.

§ 8.5 Insurance and Bonds

§ 8.5.1 The Owner and the Contractor shall purchase and maintain insurance as set forth in AIA Document A101™–2017, Standard Form of Agreement Between Owner and Contractor where the basis of payment is a Stipulated Sum, Exhibit A, Insurance and Bonds, and elsewhere in the Contract Documents.

§ 8.5.2 The Contractor shall provide bonds as set forth in AIA Document A101™–2017 Exhibit A, and elsewhere in the Contract Documents.

~~§ 8.6 Notice in electronic format, pursuant to Article 1 of AIA Document A201–2017, may be given in accordance with AIA Document E203™–2013, Building Information Modeling and Digital Data Exhibit, if completed, or as otherwise set forth below:~~

~~(If other than in accordance with AIA Document E203–2013, insert requirements for delivering notice in electronic format such as name, title, and email address of the recipient and whether and how the system will be required to generate a read receipt for the transmission.)~~

↔

§ 8.7 Other provisions:

« The Contractor represents and warrants the following to the Owner (in addition to any other representations and warranties contained in the Contract Documents), as an inducement to the Owner to execute this Contract, which representations and warranties shall survive the execution and delivery of this Contract, any termination of this Contract, and the final completion of the Work:

- (i) that it and its Subcontractors are financially solvent, able to pay all debts as they mature, and possessed of sufficient working capital to complete the Work and perform all obligations hereunder;
- (ii) that it is able to furnish the plant, tools, materials, supplies, equipment, and labor required to complete the Work and perform its obligations hereunder;
- (iii) that it is authorized to do business in the State of North Carolina and properly licensed by all necessary governmental and public and quasi-public authorities having jurisdiction over it and over the Work and the Project, including, without limitation, a valid North Carolina general contractor's license;
- (iv) that its execution of this Contract and its performance thereof is within its duly authorized powers;
- (v) that its duly authorized representatives has visited the site of the Project, familiarized himself with the local and special conditions under which the Work is to be performed, and correlated its observations with the requirements of the Contract Documents; and
- (vi) that it possesses a high level of experience and expertise in the business administration, construction, construction management, and superintendent of projects of the size, complexity, and nature of this Project, and it will perform the Work with the care, skill, and diligence of such a contractor.

The foregoing warranties are in addition to, and not in lieu of, any and all other liability imposed upon the Contractor by law with respect to the Contractor's duties, obligations, and performance hereunder. The Contractor acknowledges that the Owner is relying upon the Contractor's skill and experience in connection with the Work called for hereunder. »

ARTICLE 9 ENUMERATION OF CONTRACT DOCUMENTS

§ 9.1 This Agreement is comprised of the following documents:

- .1 AIA Document A101™–2017, Standard Form of Agreement Between Owner and Contractor
- .2 AIA Document A101™–2017, Exhibit A, Insurance and Bonds
- .3 AIA Document A201™–2017, General Conditions of the Contract for Construction
- ~~.4 AIA Document E203™–2013, Building Information Modeling and Digital Data Exhibit, dated as indicated below:~~
~~(Insert the date of the E203–2013 incorporated into this Agreement.)~~

↔

.5 Drawings

Number	Title	Date
TD001	Title Sheet	08-20-2025
S101	Overall Site Plan	08-20-2025
E001	Electrical Notes and Abbreviations	08-20-2025
EP101	Overall Electrical Plan	08-20-2025
E501	Electrical One-Line Diagrams	10-03-2025
E601	Electrical Panel Schedules	08-20-2025
P101	Overall Plumbing Plan	08-20-2025

.6 Specifications

Section	Title	Date	Pages
01 10 00	Summary	08-20-2025	03
01 23 00	Alternates	08-20-2025	01
01 26 00	Contract Modifications	08-20-2025	02
01 29 00	Payment Procedures	08-20-2025	03
01 31 00	Project Management and Coordination	08-20-2025	05
01 32 00	Construction Progress Documentation	08-20-2025	03
01 33 00	Submittal Procedures	08-20-2025	08
01 40 00	Quality Requirements	08-20-2025	06
01 42 00	References	08-20-2025	03
01 50 00	Temporary Facilities and Controls	08-20-2025	05
01 60 00	Product Requirements	08-20-2025	06
01 73 00	Execution	08-20-2025	05
01 73 29	Cutting and Patching	08-20-2025	03
01 74 19	Construction Waste Management	08-20-2025	04
01 77 00	Closeout Procedures	08-20-2025	04
01 78 23	Operation and Maintenance Data	08-20-2025	05
01 78 39	Record Documents	08-20-2025	03
01 79 00	Demonstration and Training	08-20-2025	02
02 41 13	Selective Site Demo	08-20-2025	04
23 05 53	Identification For HVAC Piping and Equipment	08-20-2025	02
23 11 23	Facility Natural-Gas Piping	08-20-2025	06
26 05 05	Selective Demolition For Electrical	08-20-2025	03
26 05 19	Low-Voltage Electrical Power Conductors and Cables	08-20-2025	08
26 05 26	Grounding and Bonding For Electrical Systems	08-20-2025	06
26 05 29	Hangers and Supports For Electrical Systems	08-20-2025	05
26 05 33.13	Conduit For Electrical Systems	08-20-2025	05
26 05 33.16	Boxes For Electrical Systems	08-20-2025	06
26 05 53	Identification For Electrical Systems	08-20-2025	05
26 05 73	Power System Studies	08-20-2025	06
26 05 83	Wiring Connections	08-20-2025	02
26 08 01	Electrical Inspection, Testing and Start-Up	08-20-2025	08
26 24 16	Panelboards	08-20-2025	05
26 27 26	Wiring Devices	08-20-2025	05
26 32 13	Engine Generators	08-20-2025	10
26 36 00	Transfer Switches	08-20-2025	07
26 43 00	Surge Protective Devices	08-20-2025	05
26 56 00	Exterior Lighting	08-20-2025	05
31 10 00	Site Clearing	08-20-2025	03
31 20 00	Earthwork	08-20-2025	11
31 25 00	Erosion Control	08-20-2025	05
32 12 16	Asphalt Pavement	08-20-2025	05
32 17 00	Pavement Markings, Signs and Specialties	08-20-2025	03
32 92 00	Lawns and Grasses	08-20-2025	06
32 93 00	Exterior Plants	08-20-2025	08

<u>33 10 00</u>	<u>Exterior Water Systems</u>	<u>08-20-2025</u>	<u>16</u>
<u>33 41 00</u>	<u>Storm Drainage</u>	<u>08-20-2025</u>	<u>05</u>

.7 Addenda, if any:

Number	Date	Pages
<u>Addenda 01</u>	<u>10.08.2025</u>	<u>8 Pages</u>

Portions of Addenda relating to bidding or proposal requirements are not part of the Contract Documents unless the bidding or proposal requirements are also enumerated in this Article 9.

.8 Other Exhibits:

(Check all boxes that apply and include appropriate information identifying the exhibit where required.)

[☐] AIA Document E204™-2017, Sustainable Projects Exhibit, dated as indicated below:
(Insert the date of the E204-2017 incorporated into this Agreement.)

« »

[☐] The Sustainability Plan:

Title	Date	Pages

[☐] Supplementary and other Conditions of the Contract:

Document	Title	Date	Pages

.9 Other documents, if any, listed below:

(List here any additional documents that are intended to form part of the Contract Documents. AIA Document A201™-2017 provides that the advertisement or invitation to bid, Instructions to Bidders, sample forms, the Contractor's bid or proposal, portions of Addenda relating to bidding or proposal requirements, and other information furnished by the Owner in anticipation of receiving bids or proposals, are not part of the Contract Documents unless enumerated in this Agreement. Any such documents should be listed here only if intended to be part of the Contract Documents.)

« [Performance Bond](#)
[Payment Bond](#)
[Notice to Proceed](#)
[Minority Participation Forms \(Guidelines for Recruitment and Selection of Minority Businesses for Participation in Union County Construction Contracts, pages 1-13; Identification of HUB Certified/Minority Business Participation Form; Affidavits A-D, if required by the terms thereof; and Appendix E, MBE Documentation for Contract Payments\)](#) »

This Agreement entered into as of the day and year first written above.

OWNER (Signature)

« »« »

(Printed name and title)

CONTRACTOR (Signature)

« »« »

(Printed name and title)

**RESOLUTION OF THE UNION COUNTY BOARD OF COMMISSIONERS
PROVIDING NOTICE OF THE UNION COUNTY PROGRESS BUILDING
BACKUP GENERATOR PROJECT**

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

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

WHEREAS, the Union County Board of Commissioners desires to give notice of construction of the UNION COUNTY PROGRESS BUILDING BACKUP GENERATOR PROJECT prior to commencement of project construction as required by G.S. § 153A-457.

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

1. Union County may commence construction of the UNION COUNTY PROGRESS BUILDING BACKUP GENERATOR PROJECT on property located at 1407 Airport Rd, Monroe, NC after the award of the construction contract for the project.
2. This resolution and notice is adopted in accordance with the construction notice requirements of G.S. § 153A-457.

Adopted this the 17th day of November 2025.

Attest:

Lynn West, Clerk to the Board

Melissa Merrell, Chairman
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 #: 25-702

Agenda Date: 11/17/2025

TITLE:

Tax Bill Correction Report for October 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve Tax Bill Correction Reports for October 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:

October Refund amount = \$21,093.01

Correction Listing Report

Union County

Page 1 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Exclusion Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001212	06054620	RE	2025	RODRIGUEZ, DIANA	10/16/2025	Value	224,400	231,800	7,400		EXCLUSION STATUS CHANGE
Public Notes:						Tax	1,080.71	1,116.35	35.64		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,080.71	1,116.35	35.64	0.00	
2025001439	06099333	RE	2025	SABLICH, ROBERT & SABLICH, SARAH	10/23/2025	Value	463,200	926,400	463,200		EXCLUSION STATUS CHANGE
Public Notes:						Tax	2,314.14	4,628.29	2,314.15		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,314.14	4,628.29	2,314.15	0.00	
2025001264	07114029A	RE	2025	SIKES, CATHERINE LORRAINE	10/20/2025	Value	134,627	158,627	24,000		EXCLUSION STATUS CHANGE
Public Notes:						Tax	646.75	762.04	115.29		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	646.75	762.04	115.29	0.00	
2025001427	07135022C	RE	2025	MOORE, SANDRA JARRELL	10/22/2025	Value	592,751	621,951	29,200		EXCLUSION STATUS CHANGE
Public Notes:						Tax	2,847.58	2,987.85	140.27		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,847.58	2,987.85	140.27	0.00	
2025001215	07147114	RE	2025	BAILEY, SUSANA E	10/16/2025	Value	74,100	128,200	54,100		EXCLUSION STATUS CHANGE
Public Notes:						Tax	481.95	833.82	351.87		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	481.95	833.82	351.87	0.00	

Correction Listing Report

Union County

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Exclusion Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001429	09405004D	RE	2025	RODDEN, MICHAEL C & RODDEN, MARGARET RUTH	10/22/2025	Value	313,740	338,490	24,750		EXCLUSION STATUS CHANGE
Public Notes:						Tax	1,510.98	1,630.17	119.19		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,510.98	1,630.17	119.19	0.00	
Totals for Type Exclusion Change - Discovery :						Value	1,802,818	2,405,468	602,650		
						Tax	8,882.11	11,958.52	3,076.41		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,882.11	11,958.52	3,076.41	0.00	

Correction Listing Report

Union County

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Exclusion Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001458	02006007	RE	2025	DOUGLAS, ERNEST CALVIN & DOUGLAS, AMANDA LYNN	10/27/2025	Value	492,150	460,505	(31,645)		EXCLUSION STATUS CHANGE
Public Notes:						Tax	2,466.65	2,308.05	(158.60)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,466.65	2,308.05	(158.60)	0.00	
Totals for Type Exclusion Change - Release :						Value	492,150	460,505	(31,645)		
						Tax	2,466.65	2,308.05	(158.60)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,466.65	2,308.05	(158.60)	0.00	

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001235	01057002	RE	2025	COLEY, LISA V & COLEY, TIMOTHY LEE	10/17/2025	Value	12,100	23,470	11,370		PUV ROLLBACK
Public Notes:						Tax	61.17	118.65	57.48		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	61.17	118.65	57.48	0.00	
2025001235	01057002	RE	2024	COLEY, LISA V & COLEY, TIMOTHY LEE	10/17/2025	Value	12,000	16,480	4,480		PUV ROLLBACK
Public Notes:						Tax	77.62	106.60	28.98		
						LL	0.00	0.00	0.00		
						INT	0.00	2.54	2.54		
						Tax TTL	77.62	109.14	31.52	0.00	

Correction Listing Report

Union County

Page 4 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001235	01057002	RE	2023	COLEY, LISA V & COLEY, TIMOTHY LEE	10/17/2025	Value	12,000	16,480	4,480		PUV ROLLBACK
Public Notes:						Tax	75.17	103.23	28.06		
						LL	0.00	0.00	0.00		
						INT	0.00	4.98	4.98		
						Tax TTL	75.17	108.21	33.04	0.00	
2025001235	01057002	RE	2022	COLEY, LISA V & COLEY, TIMOTHY LEE	10/17/2025	Value	12,000	16,480	4,480		PUV ROLLBACK
Public Notes:						Tax	75.17	103.23	28.06		
						LL	0.00	0.00	0.00		
						INT	0.00	7.50	7.50		
						Tax TTL	75.17	110.73	35.56	0.00	
2025001085	01126008	RE	2025	MULKEY, BARBARA H & DAVIS, MISCHA H	10/13/2025	Value	393,100	1,373,600	980,500		PUV ROLLBACK
Public Notes:						Tax	1,987.12	6,943.55	4,956.43		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,987.12	6,943.55	4,956.43	0.00	
2025001085	01126008	RE	2024	MULKEY, BARBARA H & DAVIS, MISCHA H	10/13/2025	Value	355,800	728,100	372,300		PUV ROLLBACK
Public Notes:						Tax	2,301.31	4,709.35	2,408.04		
						LL	0.00	0.00	0.00		
						INT	0.00	210.70	210.70		
						Tax TTL	2,301.31	4,920.05	2,618.74	0.00	
2025001085	01126008	RE	2023	MULKEY, BARBARA H & DAVIS, MISCHA H	10/13/2025	Value	355,800	728,100	372,300		PUV ROLLBACK
Public Notes:						Tax	2,228.73	4,560.82	2,332.09		
						LL	0.00	0.00	0.00		
						INT	0.00	413.94	413.94		
						Tax TTL	2,228.73	4,974.76	2,746.03	0.00	
2025001085	01126008	RE	2022	MULKEY, BARBARA H & DAVIS, MISCHA H	10/13/2025	Value	355,800	728,100	372,300		PUV ROLLBACK
Public Notes:						Tax	2,228.73	4,560.82	2,332.09		
						LL	0.00	0.00	0.00		
						INT	0.00	623.83	623.83		
						Tax TTL	2,228.73	5,184.65	2,955.92	0.00	

Correction Listing Report

Union County

Page 5 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000977	04312004	RE	2025	HINSON, CRYSTAL ANN FINCHE	10/3/2025	Value	30,100	47,280	17,180		PUV ROLLBACK
Public Notes:						Tax	144.12	226.38	82.26		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	144.12	226.38	82.26	0.00	
2025000977	04312004	RE	2024	HINSON, CRYSTAL ANN FINCHE	10/3/2025	Value	31,400	40,960	9,560		PUV ROLLBACK
Public Notes:						Tax	200.40	261.41	61.01		
						LL	0.00	0.00	0.00		
						INT	0.00	5.34	5.34		
						Tax TTL	200.40	266.75	66.35	0.00	
2025000977	04312004	RE	2023	HINSON, CRYSTAL ANN FINCHE	10/3/2025	Value	31,400	40,960	9,560		PUV ROLLBACK
Public Notes:						Tax	197.16	257.19	60.03		
						LL	0.00	0.00	0.00		
						INT	0.00	10.65	10.65		
						Tax TTL	197.16	267.84	70.68	0.00	
2025000977	04312004	RE	2022	HINSON, CRYSTAL ANN FINCHE	10/3/2025	Value	31,400	40,960	9,560		PUV ROLLBACK
Public Notes:						Tax	197.16	257.19	60.03		
						LL	0.00	0.00	0.00		
						INT	0.00	16.06	16.06		
						Tax TTL	197.16	273.25	76.09	0.00	
2025001165	05072005C	RE	2025	IVEY, MITCHELL	10/16/2025	Value	321,240	368,900	47,660		PUV ROLLBACK
Public Notes:						Tax	1,538.10	1,766.30	228.20		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,538.10	1,766.30	228.20	0.00	
2025001165	05072005C	RE	2024	IVEY, MITCHELL	10/16/2025	Value	118,670	135,600	16,930		PUV ROLLBACK
Public Notes:						Tax	757.35	865.40	108.05		
						LL	0.00	0.00	0.00		
						INT	0.00	9.45	9.45		
						Tax TTL	757.35	874.85	117.50	0.00	

Correction Listing Report

Union County

Page 6 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001165	05072005C	RE	2023	IVEY, MITCHELL	10/16/2025	Value	118,670	135,600	16,930		PUV ROLLBACK
Public Notes:						Tax	745.13	851.43	106.30		
						LL	0.00	0.00	0.00		
						INT	0.00	18.87	18.87		
						Tax TTL	745.13	870.30	125.17	0.00	
2025001165	05072005C	RE	2022	IVEY, MITCHELL	10/16/2025	Value	118,670	135,600	16,930		PUV ROLLBACK
Public Notes:						Tax	745.13	851.43	106.30		
						LL	0.00	0.00	0.00		
						INT	0.00	28.44	28.44		
						Tax TTL	745.13	879.87	134.74	0.00	
2025001077	06105022A	RE	2025	GRIFFIN, DAVID JETER & GRIFFIN, MARLENE	10/13/2025	Value	869,100	875,910	6,810		PUV ROLLBACK
Public Notes:						Tax	4,233.39	4,266.56	33.17		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,233.39	4,266.56	33.17	0.00	
2025001077	06105022A	RE	2024	GRIFFIN, DAVID JETER & GRIFFIN, MARLENE	10/13/2025	Value	523,800	526,900	3,100		PUV ROLLBACK
Public Notes:						Tax	3,374.84	3,394.81	19.97		
						LL	0.00	0.00	0.00		
						INT	0.00	1.75	1.75		
						Tax TTL	3,374.84	3,396.56	21.72	0.00	
2025001077	06105022A	RE	2023	GRIFFIN, DAVID JETER & GRIFFIN, MARLENE	10/13/2025	Value	523,800	526,900	3,100		PUV ROLLBACK
Public Notes:						Tax	3,343.94	3,363.73	19.79		
						LL	0.00	0.00	0.00		
						INT	0.00	3.52	3.52		
						Tax TTL	3,343.94	3,367.25	23.31	0.00	
2025001077	06105022A	RE	2022	GRIFFIN, DAVID JETER & GRIFFIN, MARLENE	10/13/2025	Value	523,800	526,900	3,100		PUV ROLLBACK
Public Notes:						Tax	3,343.94	3,363.73	19.79		
						LL	0.00	0.00	0.00		
						INT	0.00	5.30	5.30		
						Tax TTL	3,343.94	3,369.03	25.09	0.00	

Correction Listing Report

Union County

Page 7 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001072	08096005C	RE	2025	HINSON, COLENE R	10/10/2025	Value	30,900	139,700	108,800		PUV ROLLBACK
Public Notes:						Tax	150.86	682.02	531.16		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	150.86	682.02	531.16	0.00	
2025001072	08096005C	RE	2024	HINSON, COLENE R	10/10/2025	Value	15,200	64,700	49,500		PUV ROLLBACK
Public Notes:						Tax	99.67	424.24	324.57		
						LL	0.00	0.00	0.00		
						INT	0.00	28.40	28.40		
						Tax TTL	99.67	452.64	352.97	0.00	
2025001072	08096005C	RE	2023	HINSON, COLENE R	10/10/2025	Value	15,200	64,700	49,500		PUV ROLLBACK
Public Notes:						Tax	98.71	420.16	321.45		
						LL	0.00	0.00	0.00		
						INT	0.00	57.06	57.06		
						Tax TTL	98.71	477.22	378.51	0.00	
2025000947	08204004	RE	2025	PRICE, MATTHEW WAYNE & BROOKS, WILLIAM STANLEY	10/1/2025	Value	293,600	304,460	10,860		PUV ROLLBACK
Public Notes:						Tax	1,492.08	1,547.27	55.19		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,492.08	1,547.27	55.19	0.00	
2025000947	08204004	RE	2024	PRICE, MATTHEW WAYNE & BROOKS, WILLIAM STANLEY	10/1/2025	Value	208,800	212,190	3,390		PUV ROLLBACK
Public Notes:						Tax	1,410.87	1,433.78	22.91		
						LL	0.00	0.00	0.00		
						INT	0.00	2.01	2.01		
						Tax TTL	1,410.87	1,435.79	24.92	0.00	
2025000947	08204004	RE	2023	PRICE, MATTHEW WAYNE & BROOKS, WILLIAM STANLEY	10/1/2025	Value	202,000	205,390	3,390		PUV ROLLBACK
Public Notes:						Tax	1,352.18	1,374.87	22.69		
						LL	0.00	0.00	0.00		
						INT	0.00	4.02	4.02		
						Tax TTL	1,352.18	1,378.89	26.71	0.00	

Correction Listing Report

Union County

Page 8 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000947	08204004	RE	2022	PRICE, MATTHEW WAYNE & BROOKS, WILLIAM STANLEY	10/1/2025	Value	202,000	205,390	3,390		PUV ROLLBACK
Public Notes:						Tax	1,352.18	1,374.87	22.69		
						LL	0.00	0.00	0.00		
						INT	0.00	6.07	6.07		
						Tax TTL	1,352.18	1,380.94	28.76	0.00	
2025001095	08234027	RE	2022	ROBINSON, DANAE DRIVER & BEARD, WILLIAM BRADLEY	10/15/2025	Value	328,960	829,000	500,040		PUV ROLLBACK
Public Notes:						Tax	2,202.07	5,549.34	3,347.27		
						LL	0.00	0.00	0.00		
						INT	0.00	895.40	895.40		
						Tax TTL	2,202.07	6,444.74	4,242.67	0.00	
2025001094	08234027A	RE	2025	TRULL, JANETTE H TRUSTEE & TRULL, OLIN C TRUSTEE	10/15/2025	Value	318,600	1,582,200	1,263,600		PUV ROLLBACK
Public Notes:						Tax	1,619.12	8,040.74	6,421.62		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,619.12	8,040.74	6,421.62	0.00	
2025001094	08234027A	RE	2024	TRULL, JANETTE H TRUSTEE & TRULL, OLIN C TRUSTEE	10/15/2025	Value	160,290	674,600	514,310		PUV ROLLBACK
Public Notes:						Tax	1,083.08	4,558.27	3,475.19		
						LL	0.00	0.00	0.00		
						INT	0.00	304.08	304.08		
						Tax TTL	1,083.08	4,862.35	3,779.27	0.00	
2025001094	08234027A	RE	2023	TRULL, JANETTE H TRUSTEE & TRULL, OLIN C TRUSTEE	10/15/2025	Value	160,290	674,600	514,310		PUV ROLLBACK
Public Notes:						Tax	1,072.98	4,515.77	3,442.79		
						LL	0.00	0.00	0.00		
						INT	0.00	611.10	611.10		
						Tax TTL	1,072.98	5,126.87	4,053.89	0.00	
2025001073	08279009	RE	2025	SOMERS, MELANIE A	10/10/2025	Value	211,000	262,850	51,850		PUV ROLLBACK
Public Notes:						Tax	1,077.58	1,342.38	264.80		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,077.58	1,342.38	264.80	0.00	

Correction Listing Report

Union County

Page 9 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001073	08279009	RE	2024	SOMERS, MELANIE A	10/10/2025	Value	178,000	204,650	26,650		PUV ROLLBACK
Public Notes:						Tax	1,189.93	1,368.09	178.16		
						LL	0.00	0.00	0.00		
						INT	0.00	15.59	15.59		
						Tax TTL	1,189.93	1,383.68	193.75	0.00	
2025001073	08279009	RE	2023	SOMERS, MELANIE A	10/10/2025	Value	178,000	204,650	26,650		PUV ROLLBACK
Public Notes:						Tax	1,171.78	1,347.22	175.44		
						LL	0.00	0.00	0.00		
						INT	0.00	31.14	31.14		
						Tax TTL	1,171.78	1,378.36	206.58	0.00	
2025001073	08279009	RE	2022	SOMERS, MELANIE A	10/10/2025	Value	178,000	204,650	26,650		PUV ROLLBACK
Public Notes:						Tax	1,171.78	1,347.22	175.44		
						LL	0.00	0.00	0.00		
						INT	0.00	46.93	46.93		
						Tax TTL	1,171.78	1,394.15	222.37	0.00	
Totals for Type PUV Rollback :						Value	7,431,490	12,867,010	5,435,520		
						Tax	44,400.55	76,258.05	31,857.50		
						LL	0.00	0.00	0.00		
						INT	0.00	3,364.67	3,364.67		
						Tax TTL	44,400.55	79,622.72	35,222.17	0.00	

Correction Listing Report

Union County

Page 10 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Tax Type Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001004	410367	PP	2025	GREEN FROG WATERPROOFING L	10/6/2025	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	
2025000968	410445	PP	2025	GS MINT/ A&D COINS	10/2/2025	Value	0	0	0		CLERICAL ERROR
Public Notes:						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	
2025000956	578249	PP	2025	ROBERTO RUIZ HEATING & AIR	10/2/2025	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	
2025000956	578249	PP	2024	ROBERTO RUIZ HEATING & AIR	10/2/2025	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	

Correction Listing Report

Union County

Page 11 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Tax Type Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001308	659079	PP	2025	LOPOL FOODS INC	10/20/2025	Value	0	0	0		CLERICAL ERROR
Public Notes:						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	
Totals for Type Tax Type Change - Discovery :						Value	0	0	0		
						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001457	02006007	RE	2025	DOUGLAS, ERNEST CALVIN & DOUGLAS, AMANDA LYNN	10/27/2025	Value	429,550	492,150	62,600		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,152.90	2,466.65	313.75		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,152.90	2,466.65	313.75	0.00	
2025001437	05045002C	RE	2025	OXBO LLC	10/23/2025	Value	190,200	381,500	191,300		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	910.68	1,826.62	915.94		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	910.68	1,826.62	915.94	0.00	

Correction Listing Report

Union County

Page 12 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001433	06024082	RE	2025	BAILEY, LORI FRENCH	10/23/2025	Value	732,500	804,800	72,300		CHANGE VALUE PER BER
Public Notes:						Tax	3,568.01	3,920.18	352.17		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,568.01	3,920.18	352.17	0.00	
2025001435	06099051	RE	2025	KEELEY & COMPANY LLC	10/23/2025	Value	543,400	576,900	33,500		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,714.83	2,882.19	167.36		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,714.83	2,882.19	167.36	0.00	
2025001030	06099376	RE	2025	PINGEL, PAULA P & PINGEL, JAN	10/7/2025	Value	1,313,400	1,365,400	52,000		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,561.75	6,821.54	259.79		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,561.75	6,821.54	259.79	0.00	
2025001434	06120315	RE	2025	NACHIMUTHU, VIJAYAKUMAR	10/23/2025	Value	1,001,400	1,038,300	36,900		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,002.99	5,187.35	184.36		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,002.99	5,187.35	184.36	0.00	
2025001134	06135478	RE	2025	WEEKLEY HOMES LLC	10/15/2025	Value	113,300	494,600	381,300		EXEMPTION STATUS CHANGE
Public Notes:						Tax	544.07	2,375.07	1,831.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	544.07	2,375.07	1,831.00	0.00	
2025001436	06189093A	RE	2025	BROWN, CHRISTOPHER JOEL TR & BROWN, ELIZABETH WHITLO	10/23/2025	Value	1,363,100	1,663,100	300,000		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,100.39	8,663.09	1,562.70		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,100.39	8,663.09	1,562.70	0.00	

Correction Listing Report

Union County

Page 13 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001088	07027750	RE	2025	M/I HOMES OF CHARLOTTE LLC	10/14/2025	Value	3,100	66,100	63,000		EXEMPTION STATUS CHANGE
Public Notes:						Tax	27.10	577.85	550.75		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	27.10	577.85	550.75	0.00	
2025001084	07042598	RE	2025	TAYLOR MORRISON OF CAROLIN	10/13/2025	Value	4,800	89,600	84,800		EXEMPTION STATUS CHANGE
Public Notes:						Tax	31.05	579.62	548.57		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	31.05	579.62	548.57	0.00	
2025001023	08093001A	RE	2025	KIKER, JAMES DOUGLAS & KIKER, TERRY R	10/6/2025	Value	142,500	357,600	215,100		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	724.19	1,817.32	1,093.13		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	724.19	1,817.32	1,093.13	0.00	
2025001262	08300358	RE	2025	PULTE HOME COMPANY LLC	10/20/2025	Value	2,600	332,800	330,200		EXEMPTION STATUS CHANGE
Public Notes:						Tax	22.73	2,909.34	2,886.61		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	22.73	2,909.34	2,886.61	0.00	
2025001091	08300371	RE	2025	PULTE HOME COMPANY LLC	10/14/2025	Value	3,600	337,900	334,300		EXEMPTION STATUS CHANGE
Public Notes:						Tax	31.47	2,953.92	2,922.45		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	31.47	2,953.92	2,922.45	0.00	
2025001438	09339002A	RE	2025	MILLS, JOHN MICHAEL & BIVENS, ARNOLD LEE	10/23/2025	Value	35,600	201,300	165,700		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	311.22	1,759.76	1,448.54		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	311.22	1,759.76	1,448.54	0.00	

Correction Listing Report

Union County

Page 14 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001012	2785070	PP	2025	ALL THINGS HOME LLC	10/6/2025	Value	2,510	19,950	17,440		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	12.54	99.67	87.13		
						LL	1.25	9.97	8.72		
						INT	0.00	0.00	0.00		
						Tax TTL	13.79	109.64	95.85	0.00	
2025001216	323082	PP	2025	CRENSHAW, ROBERT JASON	10/16/2025	Value	7,321	7,621	300		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	47.36	49.30	1.94		
						LL	0.00	0.19	0.19		
						INT	0.00	0.00	0.00		
						Tax TTL	47.36	49.49	2.13	0.00	
2025001216	323082	PP	2024	CRENSHAW, ROBERT JASON	10/16/2025	Value	7,707	8,007	300		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	63.52	65.99	2.47		
						LL	0.00	0.49	0.49		
						INT	0.00	0.00	0.00		
						Tax TTL	63.52	66.48	2.96	0.00	
2025001216	323082	PP	2023	CRENSHAW, ROBERT JASON	10/16/2025	Value	5,443	5,743	300		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	44.47	46.93	2.46		
						LL	4.45	5.19	0.74		
						INT	0.00	0.00	0.00		
						Tax TTL	48.92	52.12	3.20	0.00	
2025001216	323082	PP	2022	CRENSHAW, ROBERT JASON	10/16/2025	Value	929	6,229	5,300		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	7.59	50.90	43.31		
						LL	0.00	0.98	0.98		
						INT	0.00	0.00	0.00		
						Tax TTL	7.59	51.88	44.29	0.00	
2025001216	323082	PP	2021	CRENSHAW, ROBERT JASON	10/16/2025	Value	978	1,278	300		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	7.99	10.44	2.45		
						LL	0.00	1.23	1.23		
						INT	0.00	0.00	0.00		
						Tax TTL	7.99	11.67	3.68	0.00	

Correction Listing Report

Union County

Page 15 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001347	341328	PP	2025	HATEM, MICHAEL TYLER	10/21/2025	Value	315	3,023	2,708		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	1.52	14.56	13.04		
						LL	0.00	1.30	1.30		
						INT	0.00	0.00	0.00		
						Tax TTL	1.52	15.86	14.34	0.00	
2025001265	406899	PP	2024	ACHEM INDUSTRY AMERICA INC	10/20/2025	Value	465,240	480,733	15,493		TMA AUDIT DISCOVERY
Public Notes:						Tax	5,073.44	5,242.39	168.95		
						LL	0.00	33.79	33.79		
						INT	0.00	0.00	0.00		
						Tax TTL	5,073.44	5,276.18	202.74	0.00	
2025001265	406899	PP	2023	ACHEM INDUSTRY AMERICA INC	10/20/2025	Value	471,765	485,328	13,563		TMA AUDIT DISCOVERY
Public Notes:						Tax	5,144.60	5,292.50	147.90		
						LL	514.46	558.83	44.37		
						INT	0.00	0.00	0.00		
						Tax TTL	5,659.06	5,851.33	192.27	0.00	
2025001265	406899	PP	2022	ACHEM INDUSTRY AMERICA INC	10/20/2025	Value	468,118	482,414	14,296		TMA AUDIT DISCOVERY
Public Notes:						Tax	5,104.83	5,260.72	155.89		
						LL	510.48	572.85	62.37		
						INT	0.00	0.00	0.00		
						Tax TTL	5,615.31	5,833.57	218.26	0.00	
2025001265	406899	PP	2021	ACHEM INDUSTRY AMERICA INC	10/20/2025	Value	474,709	483,730	9,021		TMA AUDIT DISCOVERY
Public Notes:						Tax	5,176.70	5,275.08	98.38		
						LL	0.00	49.19	49.19		
						INT	0.00	0.00	0.00		
						Tax TTL	5,176.70	5,324.27	147.57	0.00	
2025001265	406899	PP	2020	ACHEM INDUSTRY AMERICA INC	10/20/2025	Value	461,055	470,055	9,000		TMA AUDIT DISCOVERY
Public Notes:						Tax	6,211.33	6,332.58	121.25		
						LL	0.00	72.75	72.75		
						INT	0.00	0.00	0.00		
						Tax TTL	6,211.33	6,405.33	194.00	0.00	

Correction Listing Report

Union County

Page 16 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001075	406963	PP	2025	AEROWOOD AVIATION LLC	10/10/2025	Value	1,100,297	1,103,697	3,400		TMA AUDIT DISCOVERY
Public Notes:						Tax	9,618.80	9,648.52	29.72		
						LL	0.00	2.97	2.97		
						INT	0.00	0.00	0.00		
						Tax TTL	9,618.80	9,651.49	32.69	0.00	
2025001074	406963	PP	2024	AEROWOOD AVIATION LLC	10/10/2025	Value	1,098,813	1,102,663	3,850		TMA AUDIT DISCOVERY
Public Notes:						Tax	11,982.56	12,024.54	41.98		
						LL	0.00	8.40	8.40		
						INT	0.00	0.00	0.00		
						Tax TTL	11,982.56	12,032.94	50.38	0.00	
2025001074	406963	PP	2023	AEROWOOD AVIATION LLC	10/10/2025	Value	1,119,007	1,128,007	9,000		TMA AUDIT DISCOVERY
Public Notes:						Tax	12,202.77	12,300.92	98.15		
						LL	0.00	29.45	29.45		
						INT	0.00	0.00	0.00		
						Tax TTL	12,202.77	12,330.37	127.60	0.00	
2025001074	406963	PP	2021	AEROWOOD AVIATION LLC	10/10/2025	Value	751,836	1,211,976	460,140		TMA AUDIT DISCOVERY
Public Notes:						Tax	8,198.77	13,216.60	5,017.83		
						LL	819.88	3,328.81	2,508.93		
						INT	0.00	0.00	0.00		
						Tax TTL	9,018.65	16,545.41	7,526.76	0.00	
2025001074	406963	PP	2020	AEROWOOD AVIATION LLC	10/10/2025	Value	626,402	1,107,042	480,640		TMA AUDIT DISCOVERY
Public Notes:						Tax	8,438.89	14,914.07	6,475.18		
						LL	843.89	4,729.01	3,885.12		
						INT	0.00	0.00	0.00		
						Tax TTL	9,282.78	19,643.08	10,360.30	0.00	
2025001118	407240	PP	2025	AS INC	10/15/2025	Value	328,680	395,669	66,989		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,148.91	2,586.88	437.97		
						LL	0.00	43.80	43.80		
						INT	0.00	0.00	0.00		
						Tax TTL	2,148.91	2,630.68	481.77	0.00	

Correction Listing Report

Union County

Page 17 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001116	407240	PP	2024	AS INC	10/15/2025	Value	374,437	448,477	74,040		TMA AUDIT DISCOVERY
Public Notes:						Tax	3,133.29	3,752.86	619.57		
						LL	313.33	437.24	123.91		
						INT	0.00	0.00	0.00		
						Tax TTL	3,446.62	4,190.10	743.48	0.00	
2025001236	407298	PP	2025	AUSTIN CONSTRUCTION INC	10/17/2025	Value	587,951	593,545	5,594		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,972.09	3,000.37	28.28		
						LL	0.00	2.83	2.83		
						INT	0.00	0.00	0.00		
						Tax TTL	2,972.09	3,003.20	31.11	0.00	
2025001042	407298	PP	2024	AUSTIN CONSTRUCTION INC	10/7/2025	Value	674,185	735,678	61,493		TMA AUDIT DISCOVERY
Public Notes:						Tax	4,360.63	4,758.37	397.74		
						LL	0.00	79.55	79.55		
						INT	0.00	0.00	0.00		
						Tax TTL	4,360.63	4,837.92	477.29	0.00	
2025001042	407298	PP	2023	AUSTIN CONSTRUCTION INC	10/7/2025	Value	442,031	516,374	74,343		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,768.88	3,234.57	465.69		
						LL	0.00	139.71	139.71		
						INT	0.00	0.00	0.00		
						Tax TTL	2,768.88	3,374.28	605.40	0.00	
2025001042	407298	PP	2022	AUSTIN CONSTRUCTION INC	10/7/2025	Value	364,907	441,519	76,612		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,285.78	2,765.68	479.90		
						LL	228.58	420.53	191.95		
						INT	0.00	0.00	0.00		
						Tax TTL	2,514.36	3,186.21	671.85	0.00	
2025001042	407298	PP	2021	AUSTIN CONSTRUCTION INC	10/7/2025	Value	347,230	380,174	32,944		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,179.22	2,385.97	206.75		
						LL	0.00	103.38	103.38		
						INT	0.00	0.00	0.00		
						Tax TTL	2,179.22	2,489.35	310.13	0.00	

Correction Listing Report

Union County

Page 18 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001042	407298	PP	2020	AUSTIN CONSTRUCTION INC	10/7/2025	Value	371,431	406,788	35,357		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,926.13	3,204.68	278.55		
						LL	292.61	459.74	167.13		
						INT	0.00	0.00	0.00		
						Tax TTL	3,218.74	3,664.42	445.68	0.00	
2025000948	407346	PP	2024	AUTUMN CORPORATION	10/1/2025	Value	445,536	477,324	31,788		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,912.91	3,120.74	207.83		
						LL	0.00	41.57	41.57		
						INT	0.00	0.00	0.00		
						Tax TTL	2,912.91	3,162.31	249.40	0.00	
2025000948	407346	PP	2023	AUTUMN CORPORATION	10/1/2025	Value	442,449	474,237	31,788		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,843.18	3,047.45	204.27		
						LL	0.00	61.28	61.28		
						INT	0.00	0.00	0.00		
						Tax TTL	2,843.18	3,108.73	265.55	0.00	
2025000948	407346	PP	2022	AUTUMN CORPORATION	10/1/2025	Value	448,447	480,235	31,788		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,881.72	3,085.99	204.27		
						LL	0.00	81.71	81.71		
						INT	0.00	0.00	0.00		
						Tax TTL	2,881.72	3,167.70	285.98	0.00	
2025000948	407346	PP	2021	AUTUMN CORPORATION	10/1/2025	Value	426,669	458,457	31,788		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,751.16	2,956.13	204.97		
						LL	0.00	102.49	102.49		
						INT	0.00	0.00	0.00		
						Tax TTL	2,751.16	3,058.62	307.46	0.00	
2025001451	407464	PP	2025	BANK OF AMERICA NA	10/27/2025	Value	284,211	291,955	7,744		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,484.57	2,552.27	67.70		
						LL	0.00	6.77	6.77		
						INT	0.00	0.00	0.00		
						Tax TTL	2,484.57	2,559.04	74.47	0.00	

Correction Listing Report

Union County

Page 19 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001048	407464	PP	2024	BANK OF AMERICA NA	10/8/2025	Value	227,421	237,474	10,053		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,480.03	2,589.65	109.62		
						LL	0.00	21.93	21.93		
						INT	0.00	0.00	0.00		
						Tax TTL	2,480.03	2,611.58	131.55	0.00	
2025001048	407464	PP	2023	BANK OF AMERICA NA	10/8/2025	Value	243,406	254,609	11,203		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,654.34	2,776.51	122.17		
						LL	0.00	36.65	36.65		
						INT	0.00	0.00	0.00		
						Tax TTL	2,654.34	2,813.16	158.82	0.00	
2025001048	407464	PP	2022	BANK OF AMERICA NA	10/8/2025	Value	247,237	262,377	15,140		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,696.12	2,861.22	165.10		
						LL	0.00	66.04	66.04		
						INT	0.00	0.00	0.00		
						Tax TTL	2,696.12	2,927.26	231.14	0.00	
2025001048	407464	PP	2021	BANK OF AMERICA NA	10/8/2025	Value	206,952	223,407	16,455		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,256.81	2,436.25	179.44		
						LL	0.00	89.72	89.72		
						INT	0.00	0.00	0.00		
						Tax TTL	2,256.81	2,525.97	269.16	0.00	
2025001048	407464	PP	2020	BANK OF AMERICA NA	10/8/2025	Value	231,183	248,645	17,462		TMA AUDIT DISCOVERY
Public Notes:						Tax	3,114.50	3,349.75	235.25		
						LL	0.00	141.15	141.15		
						INT	0.00	0.00	0.00		
						Tax TTL	3,114.50	3,490.90	376.40	0.00	
2025001047	407465	PP	2024	BANK OF AMERICA NA	10/8/2025	Value	132,636	134,356	1,720		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,446.40	1,465.15	18.75		
						LL	0.00	3.75	3.75		
						INT	0.00	0.00	0.00		
						Tax TTL	1,446.40	1,468.90	22.50	0.00	

Correction Listing Report

Union County

Page 20 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001047	407465	PP	2023	BANK OF AMERICA NA	10/8/2025	Value	140,705	142,414	1,709		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,534.39	1,553.02	18.63		
						LL	0.00	5.59	5.59		
						INT	0.00	0.00	0.00		
						Tax TTL	1,534.39	1,558.61	24.22	0.00	
2025001047	407465	PP	2022	BANK OF AMERICA NA	10/8/2025	Value	154,874	156,570	1,696		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,688.90	1,707.40	18.50		
						LL	0.00	7.40	7.40		
						INT	0.00	0.00	0.00		
						Tax TTL	1,688.90	1,714.80	25.90	0.00	
2025001047	407465	PP	2021	BANK OF AMERICA NA	10/8/2025	Value	174,163	175,974	1,811		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,899.25	1,919.00	19.75		
						LL	0.00	9.88	9.88		
						INT	0.00	0.00	0.00		
						Tax TTL	1,899.25	1,928.88	29.63	0.00	
2025001047	407465	PP	2020	BANK OF AMERICA NA	10/8/2025	Value	188,601	190,432	1,831		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,540.83	2,565.50	24.67		
						LL	0.00	14.80	14.80		
						INT	0.00	0.00	0.00		
						Tax TTL	2,540.83	2,580.30	39.47	0.00	
2025001049	407466	PP	2024	BANK OF AMERICA NA	10/8/2025	Value	314,881	345,292	30,411		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,028.78	2,224.72	195.94		
						LL	0.00	39.19	39.19		
						INT	0.00	0.00	0.00		
						Tax TTL	2,028.78	2,263.91	235.13	0.00	
2025001049	407466	PP	2023	BANK OF AMERICA NA	10/8/2025	Value	353,575	384,618	31,043		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,257.22	2,455.40	198.18		
						LL	0.00	59.45	59.45		
						INT	0.00	0.00	0.00		
						Tax TTL	2,257.22	2,514.85	257.63	0.00	

Correction Listing Report

Union County

Page 21 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001049	407466	PP	2022	BANK OF AMERICA NA	10/8/2025	Value	358,390	420,596	62,206		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,287.96	2,685.08	397.12		
						LL	0.00	158.85	158.85		
						INT	0.00	0.00	0.00		
						Tax TTL	2,287.96	2,843.93	555.97	0.00	
2025001049	407466	PP	2021	BANK OF AMERICA NA	10/8/2025	Value	376,791	444,183	67,392		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,400.16	2,829.45	429.29		
						LL	0.00	214.65	214.65		
						INT	0.00	0.00	0.00		
						Tax TTL	2,400.16	3,044.10	643.94	0.00	
2025001049	407466	PP	2020	BANK OF AMERICA NA	10/8/2025	Value	439,852	479,335	39,483		TMA AUDIT DISCOVERY
Public Notes:						Tax	3,459.88	3,770.45	310.57		
						LL	0.00	186.34	186.34		
						INT	0.00	0.00	0.00		
						Tax TTL	3,459.88	3,956.79	496.91	0.00	
2025001146	407772	PP	2022	BONAKEMI USA INC	10/15/2025	Value	8,224,268	10,436,478	2,212,210		TMA AUDIT DISCOVERY
Public Notes:						Tax	89,685.64	113,809.79	24,124.15		
						LL	8,968.56	18,618.22	9,649.66		
						INT	0.00	0.00	0.00		
						Tax TTL	98,654.20	132,428.01	33,773.81	0.00	
2025001146	407772	PP	2021	BONAKEMI USA INC	10/15/2025	Value	6,357,909	7,020,886	662,977		TMA AUDIT DISCOVERY
Public Notes:						Tax	69,333.00	76,562.76	7,229.76		
						LL	0.00	3,614.88	3,614.88		
						INT	0.00	0.00	0.00		
						Tax TTL	69,333.00	80,177.64	10,844.64	0.00	
2025000952	407990	PP	2025	CD PHILEMON GRADING & TRUC	10/1/2025	Value	847,020	1,133,049	286,029		TMA AUDIT DISCOVERY
Public Notes:						Tax	4,281.69	5,727.56	1,445.87		
						LL	428.17	572.78	144.61		
						INT	0.00	0.00	0.00		
						Tax TTL	4,709.86	6,300.34	1,590.48	0.00	

Correction Listing Report

Union County

Page 22 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000951	407990	PP	2024	CD PHILEMON GRADING & TRUC	10/1/2025	Value	3,348,684	3,594,577	245,893		TMA AUDIT DISCOVERY
Public Notes:						Tax	21,659.29	23,249.72	1,590.43		
						LL	0.00	318.09	318.09		
						INT	0.00	0.00	0.00		
						Tax TTL	21,659.29	23,567.81	1,908.52	0.00	
2025000950	408010	PP	2024	CABRERA, MARK	10/1/2025	Value	31,926	149,572	117,646		TMA AUDIT DISCOVERY
Public Notes:						Tax	211.22	989.57	778.35		
						LL	21.12	176.79	155.67		
						INT	0.00	0.00	0.00		
						Tax TTL	232.34	1,166.36	934.02	0.00	
2025000950	408010	PP	2023	CABRERA, MARK	10/1/2025	Value	35,484	166,261	130,777		TMA AUDIT DISCOVERY
Public Notes:						Tax	232.46	1,089.18	856.72		
						LL	23.25	280.26	257.01		
						INT	0.00	0.00	0.00		
						Tax TTL	255.71	1,369.44	1,113.73	0.00	
2025000950	408010	PP	2022	CABRERA, MARK	10/1/2025	Value	37,270	170,253	132,983		TMA AUDIT DISCOVERY
Public Notes:						Tax	244.16	1,115.33	871.17		
						LL	24.42	372.89	348.47		
						INT	0.00	0.00	0.00		
						Tax TTL	268.58	1,488.22	1,219.64	0.00	
2025000950	408010	PP	2021	CABRERA, MARK	10/1/2025	Value	36,975	56,808	19,833		TMA AUDIT DISCOVERY
Public Notes:						Tax	241.22	370.62	129.40		
						LL	24.12	88.81	64.69		
						INT	0.00	0.00	0.00		
						Tax TTL	265.34	459.43	194.09	0.00	
2025000973	408033	PP	2025	CAMELLIA GARDENS VENUE LLC	10/2/2025	Value	66,491	92,194	25,703		TMA AUDIT DISCOVERY
Public Notes:						Tax	320.22	444.01	123.79		
						LL	0.00	12.38	12.38		
						INT	0.00	0.00	0.00		
						Tax TTL	320.22	456.39	136.17	0.00	

Correction Listing Report

Union County

Page 23 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001025	408228	PP	2024	CAROLINA PLUMBING SERVICE	10/6/2025	Value	86,452	108,065	21,613		TMA AUDIT DISCOVERY
Public Notes:						Tax	582.25	727.82	145.57		
						LL	58.23	87.34	29.11		
						INT	0.00	0.00	0.00		
						Tax TTL	640.48	815.16	174.68	0.00	
2025001025	408228	PP	2023	CAROLINA PLUMBING SERVICE	10/6/2025	Value	90,811	113,514	22,703		TMA AUDIT DISCOVERY
Public Notes:						Tax	594.81	743.52	148.71		
						LL	59.48	104.09	44.61		
						INT	0.00	0.00	0.00		
						Tax TTL	654.29	847.61	193.32	0.00	
2025001025	408228	PP	2022	CAROLINA PLUMBING SERVICE	10/6/2025	Value	95,299	119,124	23,825		TMA AUDIT DISCOVERY
Public Notes:						Tax	624.21	780.26	156.05		
						LL	0.00	62.42	62.42		
						INT	0.00	0.00	0.00		
						Tax TTL	624.21	842.68	218.47	0.00	
2025001025	408228	PP	2021	CAROLINA PLUMBING SERVICE	10/6/2025	Value	99,804	124,755	24,951		TMA AUDIT DISCOVERY
Public Notes:						Tax	653.02	816.27	163.25		
						LL	65.30	146.94	81.64		
						INT	0.00	0.00	0.00		
						Tax TTL	718.32	963.21	244.89	0.00	
2025001025	408228	PP	2020	CAROLINA PLUMBING SERVICE	10/6/2025	Value	103,548	129,435	25,887		TMA AUDIT DISCOVERY
Public Notes:						Tax	841.43	1,051.79	210.36		
						LL	84.14	210.35	126.21		
						INT	0.00	0.00	0.00		
						Tax TTL	925.57	1,262.14	336.57	0.00	
2025001087	408658	PP	2025	COCHRANE STEEL	10/13/2025	Value	272,087	299,131	27,044		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,778.90	1,955.72	176.82		
						LL	177.89	195.58	17.69		
						INT	0.00	0.00	0.00		
						Tax TTL	1,956.79	2,151.30	194.51	0.00	

Correction Listing Report

Union County

Page 24 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001086	408658	PP	2024	COCHRANE STEEL	10/13/2025	Value	305,693	361,299	55,606		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,558.04	3,023.35	465.31		
						LL	255.80	348.88	93.08		
						INT	0.00	0.00	0.00		
						Tax TTL	2,813.84	3,372.23	558.39	0.00	
2025001086	408658	PP	2023	COCHRANE STEEL	10/13/2025	Value	333,134	418,902	85,768		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,749.02	3,456.78	707.76		
						LL	274.90	487.23	212.33		
						INT	0.00	0.00	0.00		
						Tax TTL	3,023.92	3,944.01	920.09	0.00	
2025001086	408658	PP	2022	COCHRANE STEEL	10/13/2025	Value	351,970	470,918	118,948		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,841.45	3,801.72	960.27		
						LL	0.00	384.11	384.11		
						INT	0.00	0.00	0.00		
						Tax TTL	2,841.45	4,185.83	1,344.38	0.00	
2025001086	408658	PP	2021	COCHRANE STEEL	10/13/2025	Value	355,183	470,605	115,422		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,864.55	3,795.43	930.88		
						LL	286.46	751.90	465.44		
						INT	0.00	0.00	0.00		
						Tax TTL	3,151.01	4,547.33	1,396.32	0.00	
2025001086	408658	PP	2020	COCHRANE STEEL	10/13/2025	Value	306,691	320,851	14,160		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,971.84	3,109.05	137.21		
						LL	0.00	82.33	82.33		
						INT	0.00	0.00	0.00		
						Tax TTL	2,971.84	3,191.38	219.54	0.00	
2025001055	408793	PP	2025	CORDON FLOORING LLC	10/8/2025	Value	101,031	141,810	40,779		TMA AUDIT DISCOVERY
Public Notes:						Tax	653.57	917.37	263.80		
						LL	65.36	91.73	26.37		
						INT	0.00	0.00	0.00		
						Tax TTL	718.93	1,009.10	290.17	0.00	

Correction Listing Report

Union County

Page 25 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001051	408793	PP	2024	CORDON FLOORING LLC	10/8/2025	Value	101,386	169,522	68,136		TMA AUDIT DISCOVERY
Public Notes:						Tax	835.62	1,397.20	561.58		
						LL	83.56	195.88	112.32		
						INT	0.00	0.00	0.00		
						Tax TTL	919.18	1,593.08	673.90	0.00	
2025001051	408793	PP	2023	CORDON FLOORING LLC	10/8/2025	Value	99,050	191,939	92,889		TMA AUDIT DISCOVERY
Public Notes:						Tax	809.34	1,568.33	758.99		
						LL	80.93	308.63	227.70		
						INT	0.00	0.00	0.00		
						Tax TTL	890.27	1,876.96	986.69	0.00	
2025001051	408793	PP	2022	CORDON FLOORING LLC	10/8/2025	Value	94,300	161,683	67,383		TMA AUDIT DISCOVERY
Public Notes:						Tax	770.53	1,321.11	550.58		
						LL	77.05	297.29	220.24		
						INT	0.00	0.00	0.00		
						Tax TTL	847.58	1,618.40	770.82	0.00	
2025001051	408793	PP	2021	CORDON FLOORING LLC	10/8/2025	Value	94,300	118,035	23,735		TMA AUDIT DISCOVERY
Public Notes:						Tax	770.53	964.46	193.93		
						LL	77.05	174.02	96.97		
						INT	0.00	0.00	0.00		
						Tax TTL	847.58	1,138.48	290.90	0.00	
2025001051	408793	PP	2020	CORDON FLOORING LLC	10/8/2025	Value	94,300	107,131	12,831		TMA AUDIT DISCOVERY
Public Notes:						Tax	909.62	1,033.39	123.77		
						LL	90.96	165.22	74.26		
						INT	0.00	0.00	0.00		
						Tax TTL	1,000.58	1,198.61	198.03	0.00	
2025001219	409139	PP	2025	DECORE-ATIVE SPECIALTIES N	10/16/2025	Value	11,236,273	11,597,173	360,900		CLERICAL ERROR
Public Notes:						Tax	98,227.50	101,382.49	3,154.99		
						LL	9,822.75	10,138.24	315.49		
						INT	0.00	0.00	0.00		
						Tax TTL	108,050.25	111,520.73	3,470.48	0.00	

Correction Listing Report

Union County

Page 26 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001195	409548	PP	2025	EDWARD D JONES & CO LP BRA	10/16/2025	Value	0	21,827	21,827		CLERICAL ERROR
Public Notes:						Tax	0.00	168.11	168.11		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	168.11	168.11	0.00	
2025001005	410367	PP	2025	GREEN FROG WATERPROOFING L	10/6/2025	Value	0	13,106	13,106		TAX CODE CHANGE
Public Notes:						Tax	0.00	63.84	63.84		
						LL	0.00	6.39	6.39		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	70.23	70.23	0.00	
2025000969	410445	PP	2025	GS MINT/ A&D COINS	10/2/2025	Value	0	22,533	22,533		TAX CODE CHANGE
Public Notes:						Tax	0.00	196.98	196.98		
						LL	0.00	19.71	19.71		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	216.69	216.69	0.00	
2025001238	410587	PP	2024	HARRIS TEETER LLC 39	10/17/2025	Value	667,200	701,769	34,569		TMA AUDIT DISCOVERY
Public Notes:						Tax	5,705.89	6,001.53	295.64		
						LL	0.00	59.13	59.13		
						INT	0.00	0.00	0.00		
						Tax TTL	5,705.89	6,060.66	354.77	0.00	
2025001238	410587	PP	2023	HARRIS TEETER LLC 39	10/17/2025	Value	695,186	730,738	35,552		TMA AUDIT DISCOVERY
Public Notes:						Tax	5,687.32	5,978.17	290.85		
						LL	0.00	87.26	87.26		
						INT	0.00	0.00	0.00		
						Tax TTL	5,687.32	6,065.43	378.11	0.00	
2025001238	410587	PP	2022	HARRIS TEETER LLC 39	10/17/2025	Value	689,188	725,724	36,536		TMA AUDIT DISCOVERY
Public Notes:						Tax	5,638.25	5,937.15	298.90		
						LL	0.00	119.56	119.56		
						INT	0.00	0.00	0.00		
						Tax TTL	5,638.25	6,056.71	418.46	0.00	

Correction Listing Report

Union County

Page 27 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001238	410587	PP	2021	HARRIS TEETER LLC 39	10/17/2025	Value	680,711	718,229	37,518		TMA AUDIT DISCOVERY
Public Notes:						Tax	5,568.90	5,875.83	306.93		
						LL	0.00	153.47	153.47		
						INT	0.00	0.00	0.00		
						Tax TTL	5,568.90	6,029.30	460.40	0.00	
2025001238	410587	PP	2020	HARRIS TEETER LLC 39	10/17/2025	Value	708,029	730,357	22,328		TMA AUDIT DISCOVERY
Public Notes:						Tax	7,042.06	7,264.13	222.07		
						LL	0.00	133.24	133.24		
						INT	0.00	0.00	0.00		
						Tax TTL	7,042.06	7,397.37	355.31	0.00	
2025001237	410588	PP	2024	HARRIS TEETER LLC 473	10/17/2025	Value	1,122,422	1,151,381	28,959		TMA AUDIT DISCOVERY
Public Notes:						Tax	9,598.95	9,846.61	247.66		
						LL	0.00	49.53	49.53		
						INT	0.00	0.00	0.00		
						Tax TTL	9,598.95	9,896.14	297.19	0.00	
2025001237	410588	PP	2023	HARRIS TEETER LLC 473	10/17/2025	Value	1,175,579	1,204,786	29,207		TMA AUDIT DISCOVERY
Public Notes:						Tax	9,617.41	9,856.35	238.94		
						LL	0.00	71.68	71.68		
						INT	0.00	0.00	0.00		
						Tax TTL	9,617.41	9,928.03	310.62	0.00	
2025001237	410588	PP	2022	HARRIS TEETER LLC 473	10/17/2025	Value	1,229,518	1,258,972	29,454		TMA AUDIT DISCOVERY
Public Notes:						Tax	10,058.69	10,299.65	240.96		
						LL	0.00	96.38	96.38		
						INT	0.00	0.00	0.00		
						Tax TTL	10,058.69	10,396.03	337.34	0.00	
2025001237	410588	PP	2021	HARRIS TEETER LLC 473	10/17/2025	Value	1,242,078	1,271,780	29,702		TMA AUDIT DISCOVERY
Public Notes:						Tax	10,161.44	10,404.43	242.99		
						LL	0.00	121.50	121.50		
						INT	0.00	0.00	0.00		
						Tax TTL	10,161.44	10,525.93	364.49	0.00	

Correction Listing Report

Union County

Page 28 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001237	410588	PP	2020	HARRIS TEETER LLC 473	10/17/2025	Value	1,289,577	1,314,577	25,000		TMA AUDIT DISCOVERY
Public Notes:						Tax	12,826.13	13,074.78	248.65		
						LL	0.00	149.19	149.19		
						INT	0.00	0.00	0.00		
						Tax TTL	12,826.13	13,223.97	397.84	0.00	
2025001351	410748	PP	2025	MYERS WRECKER SERVICE INC	10/21/2025	Value	50,609	50,882	273		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	256.13	257.51	1.38		
						LL	25.61	25.75	0.14		
						INT	0.00	0.00	0.00		
						Tax TTL	281.74	283.26	1.52	0.00	
2025000944	412110	PP	2025	MARLIN LEASING CORPORATION	10/1/2025	Value	6,305	9,377	3,072		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	42.21	62.77	20.56		
						LL	4.22	4.22	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	46.43	66.99	20.56	0.00	
2025001353	412111	PP	2025	MARLIN LEASING CORPORATION	10/21/2025	Value	149,196	197,742	48,546		CLERICAL ERROR
Public Notes:						Tax	1,149.11	1,523.01	373.90		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,149.11	1,523.01	373.90	0.00	
2025001078	413226	PP	2024	PEPPER DINING INC	10/13/2025	Value	301,773	364,228	62,455		TMA AUDIT DISCOVERY
Public Notes:						Tax	3,290.83	3,971.91	681.08		
						LL	0.00	136.21	136.21		
						INT	0.00	0.00	0.00		
						Tax TTL	3,290.83	4,108.12	817.29	0.00	
2025001078	413226	PP	2023	PEPPER DINING INC	10/13/2025	Value	321,576	349,379	27,803		TMA AUDIT DISCOVERY
Public Notes:						Tax	3,506.79	3,809.98	303.19		
						LL	0.00	90.96	90.96		
						INT	0.00	0.00	0.00		
						Tax TTL	3,506.79	3,900.94	394.15	0.00	

Correction Listing Report

Union County

Page 29 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001078	413226	PP	2022	PEPPER DINING INC	10/13/2025	Value	266,259	310,465	44,206		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,903.55	3,385.62	482.07		
						LL	0.00	192.83	192.83		
						INT	0.00	0.00	0.00		
						Tax TTL	2,903.55	3,578.45	674.90	0.00	
2025001078	413226	PP	2021	PEPPER DINING INC	10/13/2025	Value	238,952	270,400	31,448		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,605.77	2,948.71	342.94		
						LL	0.00	171.47	171.47		
						INT	0.00	0.00	0.00		
						Tax TTL	2,605.77	3,120.18	514.41	0.00	
2025001078	413226	PP	2020	PEPPER DINING INC	10/13/2025	Value	228,924	262,530	33,606		TMA AUDIT DISCOVERY
Public Notes:						Tax	3,084.06	3,536.80	452.74		
						LL	0.00	271.64	271.64		
						INT	0.00	0.00	0.00		
						Tax TTL	3,084.06	3,808.44	724.38	0.00	
2025001050	414644	PP	2024	SPIROFLOW SYSTEMS INC	10/8/2025	Value	370,246	766,270	396,024		TMA AUDIT DISCOVERY
Public Notes:						Tax	4,037.53	8,356.17	4,318.64		
						LL	403.75	1,267.49	863.74		
						INT	0.00	0.00	0.00		
						Tax TTL	4,441.28	9,623.66	5,182.38	0.00	
2025001050	414644	PP	2022	SPIROFLOW SYSTEMS INC	10/8/2025	Value	383,641	431,774	48,133		TMA AUDIT DISCOVERY
Public Notes:						Tax	4,183.61	4,708.50	524.89		
						LL	0.00	209.96	209.96		
						INT	0.00	0.00	0.00		
						Tax TTL	4,183.61	4,918.46	734.85	0.00	
2025001050	414644	PP	2021	SPIROFLOW SYSTEMS INC	10/8/2025	Value	260,633	336,405	75,772		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,842.20	3,668.50	826.30		
						LL	0.00	413.15	413.15		
						INT	0.00	0.00	0.00		
						Tax TTL	2,842.20	4,081.65	1,239.45	0.00	

Correction Listing Report

Union County

Page 30 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001050	414644	PP	2020	SPIROFLOW SYSTEMS INC	10/8/2025	Value	358,272	454,261	95,989		TMA AUDIT DISCOVERY
Public Notes:						Tax	4,826.64	6,119.80	1,293.16		
						LL	482.66	1,258.56	775.90		
						INT	0.00	0.00	0.00		
						Tax TTL	5,309.30	7,378.36	2,069.06	0.00	
2025001449	415351	PP	2025	TINA POMPEY DDS PA	10/27/2025	Value	104,485	141,675	37,190		TMA AUDIT DISCOVERY
Public Notes:						Tax	683.12	926.27	243.15		
						LL	68.31	92.63	24.32		
						INT	0.00	0.00	0.00		
						Tax TTL	751.43	1,018.90	267.47	0.00	
2025001027	415351	PP	2024	TINA POMPEY DDS PA	10/6/2025	Value	104,485	147,394	42,909		TMA AUDIT DISCOVERY
Public Notes:						Tax	874.33	1,233.39	359.06		
						LL	87.43	159.25	71.82		
						INT	0.00	0.00	0.00		
						Tax TTL	961.76	1,392.64	430.88	0.00	
2025001027	415351	PP	2023	TINA POMPEY DDS PA	10/6/2025	Value	104,485	150,343	45,858		TMA AUDIT DISCOVERY
Public Notes:						Tax	862.21	1,240.63	378.42		
						LL	86.22	199.76	113.54		
						INT	0.00	0.00	0.00		
						Tax TTL	948.43	1,440.39	491.96	0.00	
2025001027	415351	PP	2022	TINA POMPEY DDS PA	10/6/2025	Value	104,485	108,387	3,902		TMA AUDIT DISCOVERY
Public Notes:						Tax	843.51	875.01	31.50		
						LL	84.35	96.97	12.62		
						INT	0.00	0.00	0.00		
						Tax TTL	927.86	971.98	44.12	0.00	
2025001027	415351	PP	2021	TINA POMPEY DDS PA	10/6/2025	Value	112,618	119,645	7,027		TMA AUDIT DISCOVERY
Public Notes:						Tax	908.26	964.94	56.68		
						LL	90.83	119.17	28.34		
						INT	0.00	0.00	0.00		
						Tax TTL	999.09	1,084.11	85.02	0.00	

Correction Listing Report

Union County

Page 31 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001027	415351	PP	2020	TINA POMPEY DDS PA	10/6/2025	Value	123,981	134,602	10,621		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,201.38	1,304.29	102.91		
						LL	120.14	181.89	61.75		
						INT	0.00	0.00	0.00		
						Tax TTL	1,321.52	1,486.18	164.66	0.00	
2025001354	577527	PP	2025	BIO-MEDICAL APPLICATIONS O	10/21/2025	Value	332,440	342,056	9,616		CLERICAL ERROR
Public Notes:						Tax	2,150.55	2,212.76	62.21		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,150.55	2,212.76	62.21	0.00	
2025001015	577659	PP	2024	THE TERRA GROUP LLC	10/6/2025	Value	14,513	84,790	70,277		TMA AUDIT DISCOVERY
Public Notes:						Tax	124.45	727.07	602.62		
						LL	12.45	132.97	120.52		
						INT	0.00	0.00	0.00		
						Tax TTL	136.90	860.04	723.14	0.00	
2025001015	577659	PP	2023	THE TERRA GROUP LLC	10/6/2025	Value	19,500	102,118	82,618		TMA AUDIT DISCOVERY
Public Notes:						Tax	160.25	839.21	678.96		
						LL	16.03	219.71	203.68		
						INT	0.00	0.00	0.00		
						Tax TTL	176.28	1,058.92	882.64	0.00	
2025001015	577659	PP	2022	THE TERRA GROUP LLC	10/6/2025	Value	20,000	160,894	140,894		TMA AUDIT DISCOVERY
Public Notes:						Tax	164.36	1,322.23	1,157.87		
						LL	16.44	479.59	463.15		
						INT	0.00	0.00	0.00		
						Tax TTL	180.80	1,801.82	1,621.02	0.00	
2025001015	577659	PP	2021	THE TERRA GROUP LLC	10/6/2025	Value	10,000	159,886	149,886		TMA AUDIT DISCOVERY
Public Notes:						Tax	82.12	1,312.98	1,230.86		
						LL	8.21	623.64	615.43		
						INT	0.00	0.00	0.00		
						Tax TTL	90.33	1,936.62	1,846.29	0.00	

Correction Listing Report

Union County

Page 32 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001015	577659	PP	2020	THE TERRA GROUP LLC	10/6/2025	Value	10,000	169,934	159,934		TMA AUDIT DISCOVERY
Public Notes:						Tax	100.07	1,700.53	1,600.46		
						LL	10.01	960.28	950.27		
						INT	0.00	0.00	0.00		
						Tax TTL	110.08	2,660.81	2,550.73	0.00	
2025001462	578135	PP	2024	EROSION DEFENCE LLC	10/28/2025	Value	141,086	1,203,565	1,062,479		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,201.63	10,250.76	9,049.13		
						LL	120.16	1,930.00	1,809.84		
						INT	0.00	0.00	0.00		
						Tax TTL	1,321.79	12,180.76	10,858.97	0.00	
2025001462	578135	PP	2023	EROSION DEFENCE LLC	10/28/2025	Value	72,266	754,174	681,908		TMA AUDIT DISCOVERY
Public Notes:						Tax	603.13	6,294.34	5,691.21		
						LL	60.31	1,767.67	1,707.36		
						INT	0.00	0.00	0.00		
						Tax TTL	663.44	8,062.01	7,398.57	0.00	
2025001462	578135	PP	2022	EROSION DEFENCE LLC	10/28/2025	Value	76,240	565,112	488,872		TMA AUDIT DISCOVERY
Public Notes:						Tax	636.30	4,716.42	4,080.12		
						LL	63.63	1,695.70	1,632.07		
						INT	0.00	0.00	0.00		
						Tax TTL	699.93	6,412.12	5,712.19	0.00	
2025001462	578135	PP	2021	EROSION DEFENCE LLC	10/28/2025	Value	49,308	482,188	432,880		TMA AUDIT DISCOVERY
Public Notes:						Tax	405.36	3,964.07	3,558.71		
						LL	40.54	1,819.89	1,779.35		
						INT	0.00	0.00	0.00		
						Tax TTL	445.90	5,783.96	5,338.06	0.00	
2025001462	578135	PP	2020	EROSION DEFENCE LLC	10/28/2025	Value	9,765	385,281	375,516		TMA AUDIT DISCOVERY
Public Notes:						Tax	100.54	3,966.85	3,866.31		
						LL	0.00	2,319.79	2,319.79		
						INT	0.00	0.00	0.00		
						Tax TTL	100.54	6,286.64	6,186.10	0.00	

Correction Listing Report

Union County

Page 33 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000957	578249	PP	2025	ROBERTO RUIZ HEATING & AIR	10/2/2025	Value	0	2,922	2,922		TAX CODE CHANGE
Public Notes:						Tax	0.00	13.47	13.47		
						LL	0.00	1.35	1.35		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	14.82	14.82	0.00	
2025000957	578249	PP	2024	ROBERTO RUIZ HEATING & AIR	10/2/2025	Value	0	4,286	4,286		TAX CODE CHANGE
Public Notes:						Tax	0.00	26.79	26.79		
						LL	0.00	2.68	2.68		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	29.47	29.47	0.00	
2025001082	578955	PP	2025	BETATECH LLC	10/13/2025	Value	91,669	148,206	56,537		TMA AUDIT DISCOVERY
Public Notes:						Tax	801.37	1,295.62	494.25		
						LL	80.14	129.58	49.44		
						INT	0.00	0.00	0.00		
						Tax TTL	881.51	1,425.20	543.69	0.00	
2025001081	578955	PP	2024	BETATECH LLC	10/13/2025	Value	88,919	198,073	109,154		TMA AUDIT DISCOVERY
Public Notes:						Tax	969.66	2,159.99	1,190.33		
						LL	0.00	238.07	238.07		
						INT	0.00	0.00	0.00		
						Tax TTL	969.66	2,398.06	1,428.40	0.00	
2025001081	578955	PP	2023	BETATECH LLC	10/13/2025	Value	27,957	163,389	135,432		TMA AUDIT DISCOVERY
Public Notes:						Tax	304.87	1,781.76	1,476.89		
						LL	30.49	473.56	443.07		
						INT	0.00	0.00	0.00		
						Tax TTL	335.36	2,255.32	1,919.96	0.00	
2025001080	578955	PP	2022	BETATECH LLC	10/13/2025	Value	29,611	147,352	117,741		TMA AUDIT DISCOVERY
Public Notes:						Tax	194.07	965.75	771.68		
						LL	19.41	328.08	308.67		
						INT	0.00	0.00	0.00		
						Tax TTL	213.48	1,293.83	1,080.35	0.00	

Correction Listing Report

Union County

Page 34 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001080	578955	PP	2021	BETATECH LLC	10/13/2025	Value	5,955	126,397	120,442		TMA AUDIT DISCOVERY
Public Notes:						Tax	38.78	823.10	784.32		
						LL	3.88	396.04	392.16		
						INT	0.00	0.00	0.00		
						Tax TTL	42.66	1,219.14	1,176.48	0.00	
2025001080	578955	PP	2020	BETATECH LLC	10/13/2025	Value	6,696	120,359	113,663		TMA AUDIT DISCOVERY
Public Notes:						Tax	53.31	958.30	904.99		
						LL	5.33	548.33	543.00		
						INT	0.00	0.00	0.00		
						Tax TTL	58.64	1,506.63	1,447.99	0.00	
2025001124	584677	PP	2025	H&M LOGISTICS OF NC LLC	10/15/2025	Value	51,074	171,656	120,582		TMA AUDIT DISCOVERY
Public Notes:						Tax	446.49	1,500.62	1,054.13		
						LL	44.65	150.08	105.43		
						INT	0.00	0.00	0.00		
						Tax TTL	491.14	1,650.70	1,159.56	0.00	
2025001046	584677	PP	2024	H&M LOGISTICS OF NC LLC	10/8/2025	Value	55,767	181,379	125,612		TMA AUDIT DISCOVERY
Public Notes:						Tax	608.14	1,977.94	1,369.80		
						LL	60.81	334.78	273.97		
						INT	0.00	0.00	0.00		
						Tax TTL	668.95	2,312.72	1,643.77	0.00	
2025001046	584677	PP	2023	H&M LOGISTICS OF NC LLC	10/8/2025	Value	60,571	190,243	129,672		TMA AUDIT DISCOVERY
Public Notes:						Tax	660.53	2,074.60	1,414.07		
						LL	66.05	490.27	424.22		
						INT	0.00	0.00	0.00		
						Tax TTL	726.58	2,564.87	1,838.29	0.00	
2025001046	584677	PP	2022	H&M LOGISTICS OF NC LLC	10/8/2025	Value	67,122	197,249	130,127		TMA AUDIT DISCOVERY
Public Notes:						Tax	731.97	2,151.00	1,419.03		
						LL	73.20	640.81	567.61		
						INT	0.00	0.00	0.00		
						Tax TTL	805.17	2,791.81	1,986.64	0.00	

Correction Listing Report

Union County

Page 35 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001046	584677	PP	2021	H&M LOGISTICS OF NC LLC	10/8/2025	Value	67,372	197,749	130,377		TMA AUDIT DISCOVERY
Public Notes:						Tax	734.69	2,156.45	1,421.76		
						LL	73.47	784.36	710.89		
						INT	0.00	0.00	0.00		
						Tax TTL	808.16	2,940.81	2,132.65	0.00	
2025001046	584677	PP	2020	H&M LOGISTICS OF NC LLC	10/8/2025	Value	22,218	155,534	133,316		TMA AUDIT DISCOVERY
Public Notes:						Tax	299.32	2,095.35	1,796.03		
						LL	29.93	1,107.56	1,077.63		
						INT	0.00	0.00	0.00		
						Tax TTL	329.25	3,202.91	2,873.66	0.00	
2025001348	584994	PP	2025	GIBSON, THOMAS EARL JR & GIBSON, THOMAS EARL JR	10/21/2025	Value	809	2,614	1,805		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	5.23	16.91	11.68		
						LL	0.00	1.17	1.17		
						INT	0.00	0.00	0.00		
						Tax TTL	5.23	18.08	12.85	0.00	
2025001079	606123	PP	2025	CAROLINA CONSTRUCTION EQUI	10/13/2025	Value	2,470,379	2,916,511	446,132		TMA AUDIT DISCOVERY
Public Notes:						Tax	12,329.66	14,556.31	2,226.65		
						LL	0.00	222.67	222.67		
						INT	0.00	0.00	0.00		
						Tax TTL	12,329.66	14,778.98	2,449.32	0.00	
2025001067	625515	PP	2025	SUMMIT HEALTH SOLUTIONS, P	10/9/2025	Value	32,748	170,199	137,451		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	212.99	1,106.97	893.98		
						LL	21.30	110.71	89.41		
						INT	0.00	0.00	0.00		
						Tax TTL	234.29	1,217.68	983.39	0.00	
2025000974	630688	PP	2025	SHADY OAK HOMES LLC	10/2/2025	Value	20,967	25,244	4,277		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	106.55	128.29	21.74		
						LL	0.00	2.06	2.06		
						INT	0.00	0.00	0.00		
						Tax TTL	106.55	130.35	23.80	0.00	

Correction Listing Report

Union County

Page 36 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001440	647862	PP	2025	SKYLINE LOGISTICS SVC INC	10/24/2025	Value	306,000	357,904	51,904		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	2,048.36	2,395.81	347.45		
						LL	204.84	239.59	34.75		
						INT	0.00	0.00	0.00		
						Tax TTL	2,253.20	2,635.40	382.20	0.00	
2025000954	652206	PP	2025	CATERPILLAR FINANCIAL SERV	10/2/2025	Value	547,579	579,404	31,825		CLERICAL ERROR
Public Notes:						Tax	2,673.28	2,828.65	155.37		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,673.28	2,828.65	155.37	0.00	
2025001454	657920	PP	2025	SNAP FITNESS 24-7	10/27/2025	Value	62,550	99,308	36,758		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	481.76	764.87	283.11		
						LL	48.18	76.49	28.31		
						INT	0.00	0.00	0.00		
						Tax TTL	529.94	841.36	311.42	0.00	
2025001454	657920	PP	2024	SNAP FITNESS 24-7	10/27/2025	Value	0	109,567	109,567		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	1,123.39	1,123.39		
						LL	0.00	224.68	224.68		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,348.07	1,348.07	0.00	
2025001454	657920	PP	2023	SNAP FITNESS 24-7	10/27/2025	Value	0	65,725	65,725		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	667.04	667.04		
						LL	0.00	200.11	200.11		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	867.15	867.15	0.00	
2025001011	658014	PP	2024	SORELLA COFFEE, LLC	10/6/2025	Value	0	45,275	45,275		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	582.01	582.01		
						LL	0.00	116.40	116.40		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	698.41	698.41	0.00	

Correction Listing Report

Union County

Page 37 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001019	658180	PP	2025	CLUB PILATES OF INDIAN TRA	10/6/2025	Value	33,350	60,848	27,498		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	218.04	397.82	179.78		
						LL	21.80	39.78	17.98		
						INT	0.00	0.00	0.00		
						Tax TTL	239.84	437.60	197.76	0.00	
2025001019	658180	PP	2024	CLUB PILATES OF INDIAN TRA	10/6/2025	Value	0	67,426	67,426		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	564.22	564.22		
						LL	0.00	112.84	112.84		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	677.06	677.06	0.00	
2025001019	658180	PP	2023	CLUB PILATES OF INDIAN TRA	10/6/2025	Value	0	74,004	74,004		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	610.68	610.68		
						LL	0.00	183.20	183.20		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	793.88	793.88	0.00	
2025001102	658797	PP	2025	GRIFFIN, RICHARD ERIC	10/15/2025	Value	5,463	13,361	7,898		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	53.06	129.76	76.70		
						LL	5.31	12.98	7.67		
						INT	0.00	0.00	0.00		
						Tax TTL	58.37	142.74	84.37	0.00	
2025001309	659079	PP	2025	LOPOL FOODS INC	10/20/2025	Value	0	16,224	16,224		CLERICAL ERROR
Public Notes:						Tax	0.00	75.38	75.38		
						LL	0.00	7.54	7.54		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	82.92	82.92	0.00	
2025001220	660096	PP	2025	MOSAIC GROUP LLC	10/16/2025	Value	160,538	1,393,046	1,232,508		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	1,403.42	12,178.01	10,774.59		
						LL	140.34	1,217.81	1,077.47		
						INT	0.00	0.00	0.00		
						Tax TTL	1,543.76	13,395.82	11,852.06	0.00	

Correction Listing Report

Union County

Page 38 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001346	665621	PP	2025	KELLY II, JAMES PATRICK	10/21/2025	Value	0	1,805	1,805		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	8.39	8.39		
						LL	0.00	0.84	0.84		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	9.23	9.23	0.00	
2025001349	666182	PP	2025	LEMIEUX, GUY ALBAN	10/21/2025	Value	0	1,354	1,354		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	6.29	6.29		
						LL	0.00	0.63	0.63		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	6.92	6.92	0.00	
2025001026	669046	PP	2025	KATARZYNA, DEC	10/6/2025	Value	0	5,702	5,702		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	27.77	27.77		
						LL	0.00	2.78	2.78		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	30.55	30.55	0.00	
2025001026	669046	PP	2024	KATARZYNA, DEC	10/6/2025	Value	0	6,001	6,001		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	38.66	38.66		
						LL	0.00	7.73	7.73		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	46.39	46.39	0.00	
2025001026	669046	PP	2023	KATARZYNA, DEC	10/6/2025	Value	0	6,318	6,318		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	40.33	40.33		
						LL	0.00	12.10	12.10		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	52.43	52.43	0.00	
2025001026	669046	PP	2022	KATARZYNA, DEC	10/6/2025	Value	0	6,650	6,650		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	42.45	42.45		
						LL	0.00	16.98	16.98		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	59.43	59.43	0.00	

Correction Listing Report

Union County

Page 39 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001352	669054	PP	2025	COLEMAN, JOHN CARLTON II	10/21/2025	Value	0	9,500	9,500		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	73.17	73.17		
						LL	0.00	7.32	7.32		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	80.49	80.49	0.00	
2025001350	669063	PP	2025	HALL, RUSSELL MERTON	10/21/2025	Value	0	72,200	72,200		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	347.72	347.72		
						LL	0.00	34.77	34.77		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	382.49	382.49	0.00	
2025001448	669140	PP	2025	GRIFFIN, RHONDA & GRIFFIN, CHARLES MITCHE	10/27/2025	Value	0	25,216	25,216		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	220.44	220.44		
						LL	0.00	22.04	22.04		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	242.48	242.48	0.00	
2025001293	669311	PP	2024		10/20/2025	Value	0	1,167	1,167		GAP BILL
Public Notes:						Tax	0.00	9.77	9.77		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	9.77	9.77	0.00	
2025001282	669314	PP	2024		10/20/2025	Value	0	13,100	13,100		GAP BILL
Public Notes:						Tax	0.00	106.48	106.48		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	106.48	106.48	0.00	
2025001283	669315	PP	2024		10/20/2025	Value	0	1,403	1,403		GAP BILL
Public Notes:						Tax	0.00	11.74	11.74		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	11.74	11.74	0.00	

Correction Listing Report

Union County

Page 40 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001285	669316	PP	2024		10/20/2025	Value	0	3,309	3,309		GAP BILL
Public Notes:						Tax	0.00	21.70	21.70		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	21.70	21.70	0.00	
2025001284	669317	PP	2024		10/20/2025	Value	0	7,782	7,782		GAP BILL
Public Notes:						Tax	0.00	50.80	50.80		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	50.80	50.80	0.00	
2025000945	669334	PP	2025	KATRINA'S MEXICAN GRILL IN	10/1/2025	Value	0	217,036	217,036		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	1,671.61	1,671.61		
						LL	0.00	167.16	167.16		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,838.77	1,838.77	0.00	
2025001288	669363	PP	2024		10/20/2025	Value	0	14,041	14,041		GAP BILL
Public Notes:						Tax	0.00	153.12	153.12		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	153.12	153.12	0.00	
2025001292	669364	PP	2024		10/20/2025	Value	0	11,808	11,808		GAP BILL
Public Notes:						Tax	0.00	76.37	76.37		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	76.37	76.37	0.00	
2025001291	669365	PP	2024		10/20/2025	Value	0	18,189	18,189		GAP BILL
Public Notes:						Tax	0.00	220.38	220.38		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	220.38	220.38	0.00	

Correction Listing Report

Union County

Page 41 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001268	669368	PP	2024		10/20/2025	Value	0	12,867	12,867		GAP BILL
Public Notes:						Tax	0.00	83.22	83.22		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	83.22	83.22	0.00	
2025001270	669370	PP	2024		10/20/2025	Value	0	1,985	1,985		GAP BILL
Public Notes:						Tax	0.00	12.96	12.96		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	12.96	12.96	0.00	
2025001279	669371	PP	2024		10/20/2025	Value	0	17,325	17,325		GAP BILL
Public Notes:						Tax	0.00	144.98	144.98		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	144.98	144.98	0.00	
2025001286	669374	PP	2024		10/20/2025	Value	0	64,680	64,680		GAP BILL
Public Notes:						Tax	0.00	422.23	422.23		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	422.23	422.23	0.00	
2025001287	669375	PP	2024		10/20/2025	Value	0	5,577	5,577		GAP BILL
Public Notes:						Tax	0.00	36.41	36.41		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	36.41	36.41	0.00	
2025001289	669377	PP	2024		10/20/2025	Value	0	4,067	4,067		GAP BILL
Public Notes:						Tax	0.00	52.28	52.28		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	52.28	52.28	0.00	

Correction Listing Report

Union County

Page 42 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001290	669378	PP	2024		10/20/2025	Value	0	23,543	23,543		GAP BILL
Public Notes:						Tax	0.00	302.65	302.65		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	302.65	302.65	0.00	
2025001013	669383	PP	2025	PANDYA & TREASURER LLC	10/6/2025	Value	0	10,066	10,066		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	46.77	46.77		
						LL	0.00	4.68	4.68		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	51.45	51.45	0.00	
2025001445	669403	PP	2025	VILLANELLA, NEALLEIGH HANA & VILLANELLA, RICHARD LOU	10/27/2025	Value	0	19,539	19,539		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	98.89	98.89		
						LL	0.00	9.89	9.89		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	108.78	108.78	0.00	
2025000946	669426	PP	2025	WILSON, MATTHEW A & MATTHEW A WILSON LLC	10/1/2025	Value	0	27,519	27,519		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	284.60	284.60		
						LL	0.00	28.47	28.47		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	313.07	313.07	0.00	
2025001066	669487	PP	2025	VERA'S KITCHEN MONROE	10/9/2025	Value	0	21,047	21,047		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	183.99	183.99		
						LL	0.00	18.41	18.41		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	202.40	202.40	0.00	
2025001131	669506	PP	2024		10/15/2025	Value	0	31,990	31,990		COUNTY TRANSFER
Public Notes:						Tax	0.00	264.40	264.40		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	264.40	264.40	0.00	

Correction Listing Report

Union County

Page 43 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001456	669537	PP	2025	VICTORY OPERATIONS LLC	10/27/2025	Value	0	6,913	6,913		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	33.29	33.29		
						LL	0.00	3.33	3.33		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	36.62	36.62	0.00	
Totals for Type Value Change - Discovery :						Value	73,538,510	92,306,919	18,768,409		
						Tax	637,790.82	801,800.63	164,009.81		
						LL	27,308.86	77,367.57	50,058.71		
						INT	0.00	0.00	0.00		
						Tax TTL	665,099.68	879,168.20	214,068.52	0.00	

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001149	01084012A	RE	2025	CANNON, LINDA MILLS & CANNON, HENRY PIERSON	10/15/2025	Value	288,100	246,600	(41,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,456.34	1,246.56	(209.78)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,456.34	1,246.56	(209.78)	0.00	
2025001358	01087008H	RE	2025	LALLY, JAMES FRANCIS & LALLY, EVA LYNN	10/21/2025	Value	868,400	851,200	(17,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,389.76	4,302.82	(86.94)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,389.76	4,302.82	(86.94)	0.00	

Correction Listing Report

Union County

Page 44 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001359	01150005J	RE	2025	COLLINS, HEATHER MCBRIDE & COLLINS, JUSTIN ROBERT	10/21/2025	Value	694,600	650,400	(44,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,511.20	3,287.77	(223.43)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,511.20	3,287.77	(223.43)	0.00	
2025001360	01177012B	RE	2025	LANGSTON, LARRY D	10/21/2025	Value	135,600	86,700	(48,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	685.46	438.27	(247.19)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	685.46	438.27	(247.19)	0.00	
2025001104	02114137	RE	2025	EPSILON REALTY COMPANY & CAESAR REALTY LLC	10/15/2025	Value	5,251,900	4,761,500	(490,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	51,006.45	46,243.69	(4,762.76)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	51,006.45	46,243.69	(4,762.76)	4,762.76	
2025001001	02164008M	RE	2025	AMBROSIO, BERNADETTE & AMBROSIO, VINCENZO	10/3/2025	Value	861,200	780,400	(80,800)		CHANGE VALUE PER BER
Public Notes:						Tax	4,353.37	3,944.92	(408.45)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,353.37	3,944.92	(408.45)	0.00	
2025001150	02223013	RE	2025	CRUZAN, MARK G & CRUZAN, DONNA M	10/15/2025	Value	795,100	786,600	(8,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,965.96	3,923.56	(42.40)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,965.96	3,923.56	(42.40)	0.00	
2025001093	02321063	RE	2025	6017 US 74 LLC	10/14/2025	Value	214,800	44,900	(169,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,086.14	436.07	(1,650.07)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,086.14	436.07	(1,650.07)	0.00	

Correction Listing Report

Union County

Page 45 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001151	03066001	RE	2025	COX LAND INVESTMENTS LIMIT	10/15/2025	Value	666,900	585,800	(81,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,249.80	2,854.60	(395.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,249.80	2,854.60	(395.20)	395.20	
2025001152	03138032	RE	2025	AUTRY, TERESA R	10/15/2025	Value	110,000	83,400	(26,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	536.03	406.40	(129.63)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	536.03	406.40	(129.63)	0.00	
2025001185	03144016B	RE	2025	HILL, CHARLES CAMERON & LANGFORD, HANNAH B	10/16/2025	Value	739,200	580,400	(158,800)		CHANGE VALUE PER BER
Public Notes:						Tax	3,687.13	2,895.04	(792.09)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,687.13	2,895.04	(792.09)	0.00	
2025001097	04036025A	RE	2025	WILSON, LAURA BEVIS & WILSON, DANIEL REID	10/15/2025	Value	438,400	88,200	(350,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,096.43	421.77	(1,674.66)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,096.43	421.77	(1,674.66)	0.00	
2025001153	04102007	RE	2025	BLOUNT, MARTHA JORDAN & BLOUNT, LEONDUS THERON	10/15/2025	Value	559,000	557,500	(1,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,724.01	2,716.70	(7.31)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,724.01	2,716.70	(7.31)	7.31	
2025001174	04201002D	RE	2025	GRIFFIN, CHARLES MITCHELL & GRIFFIN, RHONDA	10/16/2025	Value	180,200	107,100	(73,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	830.54	493.62	(336.92)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	830.54	493.62	(336.92)	0.00	

Correction Listing Report

Union County

Page 46 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001105	05012006	RE	2025	LINKER, MARIANNE M	10/15/2025	Value	254,800	218,500	(36,300)		CHANGE VALUE PER BER
Public Notes:						Tax	1,227.12	1,052.30	(174.82)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,227.12	1,052.30	(174.82)	0.00	
2025001154	05013004	RE	2025	TYSON, SAMUEL D	10/15/2025	Value	407,600	386,400	(21,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,951.59	1,850.09	(101.50)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,951.59	1,850.09	(101.50)	0.00	
2025001450	05039009B	RE	2025	BEATY REALTY LLC	10/27/2025	Value	633,600	593,200	(40,400)		CHANGE VALUE PER BER
Public Notes:						Tax	3,033.68	2,840.24	(193.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,033.68	2,840.24	(193.44)	0.00	
2025001452	05042017	RE	2025	BEATY REALTY LLC	10/27/2025	Value	538,000	516,400	(21,600)		CHANGE VALUE PER BER
Public Notes:						Tax	2,575.94	2,472.52	(103.42)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,575.94	2,472.52	(103.42)	0.00	
2025001211	05045002	RE	2025	SKIPPER, LAWRENCE E	10/16/2025	Value	787,800	614,300	(173,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,771.99	2,941.27	(830.72)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,771.99	2,941.27	(830.72)	0.00	
2025001213	05112080	RE	2025	DALE HOMES LLC	10/16/2025	Value	331,500	323,000	(8,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,553.21	2,487.75	(65.46)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,553.21	2,487.75	(65.46)	0.00	

Correction Listing Report

Union County

Page 47 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001230	05114198	RE	2025	RS RENTAL III-A LLC	10/17/2025	Value	386,200	356,100	(30,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,974.51	2,742.68	(231.83)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,974.51	2,742.68	(231.83)	0.00	
2025001175	05141034	RE	2025	MALTESE, ANTHONY J	10/16/2025	Value	742,100	581,700	(160,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,563.56	2,793.32	(770.24)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,563.56	2,793.32	(770.24)	0.00	
2025001465	05159001	RE	2025	LAWRENCE, ANGELA & LAWRENCE, WILLIAM S	10/28/2025	Value	732,000	732,000	0		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	3,515.06	3,515.06	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,515.06	3,515.06	0.00	0.00	
2025001231	05159001	RE	2025	LAWRENCE, ANGELA & LAWRENCE, WILLIAM S	10/17/2025	Value	832,800	732,000	(100,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,999.11	3,515.06	(484.05)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,999.11	3,515.06	(484.05)	0.00	
2025001465	05159001	RE	2024	LAWRENCE, ANGELA & LAWRENCE, WILLIAM S	10/28/2025	Value	535,200	477,800	(57,400)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	3,426.89	3,059.35	(367.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,426.89	3,059.35	(367.54)	367.54	
2025001424	05180016	RE	2025	WOODWARD, TIMOTHY M & WOODWARD, JOYCE S	10/22/2025	Value	986,100	852,900	(133,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,735.25	4,095.63	(639.62)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,735.25	4,095.63	(639.62)	0.00	

Correction Listing Report

Union County

Page 48 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001406	06003001A	RE	2025	COSTELLO, DANIEL & COSTELLO, AMBER	10/22/2025	Value	755,000	655,700	(99,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,677.61	3,193.91	(483.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,677.61	3,193.91	(483.70)	0.00	
2025001187	06006008	RE	2025	FREEDOM FARM LLC	10/16/2025	Value	743,200	510,000	(233,200)		CHANGE VALUE PER BER
Public Notes:						Tax	3,620.13	2,484.21	(1,135.92)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,620.13	2,484.21	(1,135.92)	0.00	
2025001110	06006253	RE	2025	FANG, HONGBING & ZHANG, HONG	10/15/2025	Value	942,300	831,000	(111,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,589.94	4,047.80	(542.14)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,589.94	4,047.80	(542.14)	0.00	
2025001412	06024030	RE	2025	DOWNTOWN WESLEY CHAPEL LLC	10/22/2025	Value	360,200	252,000	(108,200)		CHANGE VALUE PER BER
Public Notes:						Tax	1,754.53	1,227.49	(527.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,754.53	1,227.49	(527.04)	527.04	
2025001112	06027042A	RE	2025	LYONS, TAMARA C TRUSTEE & LYONS, ROBERT SHELLY TR	10/15/2025	Value	1,796,100	1,580,700	(215,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,748.80	7,699.59	(1,049.21)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,748.80	7,699.59	(1,049.21)	0.00	
2025001415	06027513	RE	2025	VAN BLAKE, VERN LEE & VAN BLAKE, RHEA JO	10/22/2025	Value	770,200	720,600	(49,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,578.35	3,347.91	(230.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,578.35	3,347.91	(230.44)	0.00	

Correction Listing Report

Union County

Page 49 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000996	06054020	RE	2025	BERTHOLD, KATHLEEN & BERTHOLD, MOLLIE	10/3/2025	Value	366,600	350,400	(16,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,829.70	1,748.85	(80.85)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,829.70	1,748.85	(80.85)	0.00	
2025001100	06054054A	RE	2025	SMITH, PAMELA JOY WILSON & SMITH, MARCUS DARYL	10/15/2025	Value	482,600	316,100	(166,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,408.66	1,577.66	(831.00)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,408.66	1,577.66	(831.00)	0.00	
2025001210	06054620	RE	2025	RODRIGUEZ, DIANA	10/16/2025	Value	239,200	224,400	(14,800)		CHANGE VALUE PER BER
Public Notes:						Tax	1,151.98	1,080.71	(71.27)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,151.98	1,080.71	(71.27)	0.00	
2025001169	06054661	RE	2025	RYMER, DION V & RYMER, TANIA S	10/16/2025	Value	775,600	772,400	(3,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,735.29	3,719.88	(15.41)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,735.29	3,719.88	(15.41)	0.00	
2025001044	06063009	RE	2025	GALLOWAY, RONALD E & GALLOWAY, DIANNE T	10/8/2025	Value	712,700	597,600	(115,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,560.65	2,985.61	(575.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,560.65	2,985.61	(575.04)	0.00	
2025001182	06069092	RE	2025	GALE, LISA LOUISE TRUSTEE & GALE, STEVEN LLOYD TRUS	10/16/2025	Value	990,200	847,100	(143,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,947.04	4,232.11	(714.93)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,947.04	4,232.11	(714.93)	0.00	

Correction Listing Report

Union County

Page 50 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001041	06069132	RE	2025	JIANG, MEREDITH & JIANG, DAVID	10/7/2025	Value	862,300	748,700	(113,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,308.05	3,740.51	(567.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,308.05	3,740.51	(567.54)	0.00	
2025001045	06072036	RE	2025	STEELE, CHRISTY & STEELE, JAMES	10/8/2025	Value	827,400	726,800	(100,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,133.69	3,631.09	(502.60)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,133.69	3,631.09	(502.60)	467.39	
2025001103	06075021A	RE	2025	WEATHERFORD, MEGAN W & WEATHERFORD, THOMAS H	10/15/2025	Value	879,800	720,500	(159,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,285.51	3,509.56	(775.95)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,285.51	3,509.56	(775.95)	0.00	
2025001106	06078006D	RE	2025	BARRY, BENJAMIN L	10/15/2025	Value	358,500	307,400	(51,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,746.25	1,497.35	(248.90)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,746.25	1,497.35	(248.90)	248.90	
2025000997	06078012	RE	2025	TERRY, AMY B & TERRY, CHARLES STUART	10/3/2025	Value	1,132,900	991,800	(141,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,263.45	4,607.90	(655.55)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,263.45	4,607.90	(655.55)	0.00	
2025001109	06078022A	RE	2025	DOMINI, KYLE R	10/15/2025	Value	284,400	284,000	(400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,385.31	1,383.36	(1.95)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,385.31	1,383.36	(1.95)	0.00	

Correction Listing Report

Union County

Page 51 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001466	06084001L	RE	2025	MCDOUGALL, SHERRY CARTER	10/28/2025	Value	210,700	63,900	(146,800)		DUPLICATE ASSESSMENT
Public Notes:						Tax	1,048.65	318.03	(730.62)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,048.65	318.03	(730.62)	0.00	
2025001039	06096109	RE	2025	RITTER, STEPHANIE N & RITTER, JEREMY A	10/7/2025	Value	815,500	699,700	(115,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,074.24	3,495.70	(578.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,074.24	3,495.70	(578.54)	0.00	
2025001113	06099141	RE	2025	WILLIAMS, LINDA LOUISE TRU & WILLIAMS, ROBERT DEAN T	10/15/2025	Value	1,578,200	1,209,200	(369,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,884.69	6,041.16	(1,843.53)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,884.69	6,041.16	(1,843.53)	0.00	
2025001114	06102117	RE	2025	HENDERSON, WANDA H	10/15/2025	Value	1,515,200	1,489,400	(25,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,039.62	6,919.75	(119.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,039.62	6,919.75	(119.87)	0.00	
2025001183	06102244	RE	2025	ROCHE, JUSTIN RICHARD TRUS & ROCHE LIVING TRUST	10/16/2025	Value	2,274,800	2,192,400	(82,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	10,568.72	10,185.89	(382.83)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	10,568.72	10,185.89	(382.83)	0.00	
2025001297	06105031	RE	2025	ARMORS LLC	10/20/2025	Value	529,800	432,400	(97,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,580.66	2,106.22	(474.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,580.66	2,106.22	(474.44)	0.00	

Correction Listing Report

Union County

Page 52 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001298	06117009	RE	2025	LURZ, LAUREN M & LURZ, JONATHAN R	10/20/2025	Value	955,900	937,600	(18,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,775.68	4,684.25	(91.43)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,775.68	4,684.25	(91.43)	0.00	
2025001034	06120152	RE	2025	FOSTER, PATRICIA COOPER	10/7/2025	Value	910,900	761,300	(149,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,550.86	3,803.45	(747.41)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,550.86	3,803.45	(747.41)	0.00	
2025001115	06123202	RE	2025	FIELDING, ROBERT J & FIELDING, JULIE	10/15/2025	Value	1,473,400	1,467,800	(5,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,361.11	7,333.13	(27.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,361.11	7,333.13	(27.98)	26.02	
2025001117	06129086	RE	2025	BIVENS, MARK B & BIVENS, KIMBERLY S	10/15/2025	Value	2,404,600	2,080,000	(324,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	12,013.38	10,391.68	(1,621.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	12,013.38	10,391.68	(1,621.70)	0.00	
2025001090	06135501	RE	2025	WEEKLEY HOMES LLC	10/14/2025	Value	113,300	113,300	0		EXEMPTION STATUS CHANGE
Public Notes:						Tax	544.06	544.07	0.01		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	544.06	544.07	0.01	0.00	
2025001266	06135593	RE	2025	WEEKLEY HOMES LLC	10/20/2025	Value	110,700	110,700	0		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	531.58	531.58	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	531.58	531.58	0.00	0.00	

Correction Listing Report

Union County

Page 53 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001267	06135594	RE	2025	WEEKLEY HOMES LLC	10/20/2025	Value	110,700	110,700	0		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	531.58	531.58	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	531.58	531.58	0.00	0.00	
2025001232	06135638	RE	2025	WEEKLEY HOMES LLC	10/17/2025	Value	409,000	312,000	(97,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,964.02	1,498.22	(465.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,964.02	1,498.22	(465.80)	0.00	
2025001111	06138046	RE	2025	HAIGLER, CHARLES LAWRENCE	10/15/2025	Value	768,700	697,300	(71,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,691.30	3,348.43	(342.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,691.30	3,348.43	(342.87)	0.00	
2025001389	06142050	RE	2025	HERBERT, ANNA C & HERBERT, PETER M	10/22/2025	Value	415,500	342,500	(73,000)		CHANGE VALUE PER BER
Public Notes:						Tax	3,200.18	2,637.94	(562.24)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,200.18	2,637.94	(562.24)	0.00	
2025001120	06147020C	RE	2025	HEGAZI, MOHAMED & HEGAZI, EIMAN	10/15/2025	Value	1,587,600	1,253,200	(334,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,931.65	6,260.99	(1,670.66)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,931.65	6,260.99	(1,670.66)	0.00	
2025001121	06147053	RE	2025	FISCHER, JAMES & FISCHER, RUTH C	10/15/2025	Value	955,100	756,400	(198,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,771.68	3,778.97	(992.71)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,771.68	3,778.97	(992.71)	0.00	

Correction Listing Report

Union County

Page 54 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001127	06150070A	RE	2025	PREKAZI, FEDRI & SELMANI, ALBANA	10/15/2025	Value	555,900	536,700	(19,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,777.28	2,681.35	(95.93)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,777.28	2,681.35	(95.93)	0.00	
2025001176	06153107	RE	2025	POLITE, STACIE & LEVI, LARRY MICHAEL	10/16/2025	Value	709,300	699,400	(9,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,543.66	3,494.20	(49.46)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,543.66	3,494.20	(49.46)	0.00	
2025001122	06153186	RE	2025	NEER, RICHARD & NEER, VICTORIA	10/15/2025	Value	1,701,000	1,371,400	(329,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,498.20	6,851.51	(1,646.69)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,498.20	6,851.51	(1,646.69)	0.00	
2025001123	06156021	RE	2025	GAO, FENG	10/15/2025	Value	1,350,500	1,141,300	(209,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,747.10	5,701.93	(1,045.17)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,747.10	5,701.93	(1,045.17)	0.00	
2025001054	06156163	RE	2025	DAVILA, DERHA C & DAVILA, RICARDO	10/8/2025	Value	1,117,600	990,000	(127,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,821.58	5,156.91	(664.67)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,821.58	5,156.91	(664.67)	0.00	
2025001299	06159301	RE	2025	LY-HANG, ANH	10/20/2025	Value	801,600	743,500	(58,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,173.92	5,726.44	(447.48)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,173.92	5,726.44	(447.48)	0.00	

Correction Listing Report

Union County

Page 55 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001300	06159320	RE	2025	MCGHEE, AMY E & MCGHEE, GARLAND S	10/20/2025	Value	798,600	770,100	(28,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,150.82	5,931.31	(219.51)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,150.82	5,931.31	(219.51)	0.00	
2025001179	06159323	RE	2025	PARROTT, MICHELLE LYNN & PARROTT, JESSE ALAN	10/16/2025	Value	770,700	749,000	(21,700)		CHANGE VALUE PER BER
Public Notes:						Tax	5,935.93	5,768.80	(167.13)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,935.93	5,768.80	(167.13)	0.00	
2025001129	06159441	RE	2025	CHAU, AMY MINH H	10/15/2025	Value	917,700	876,100	(41,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,068.13	6,747.72	(320.41)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,068.13	6,747.72	(320.41)	0.00	
2025001099	06174384	RE	2025	TAYLOR, HOPE & TAYLOR, MARK D	10/15/2025	Value	1,816,700	1,699,200	(117,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	9,076.23	8,489.20	(587.03)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,076.23	8,489.20	(587.03)	0.00	
2025001171	06180037	RE	2025	LARSEN, HEATHER LYNN & LARSEN, DAVID EARL	10/16/2025	Value	971,500	774,000	(197,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,853.61	3,866.90	(986.71)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,853.61	3,866.90	(986.71)	0.00	
2025000998	06180354	RE	2025	DEBOER, CALVIN GEORGE & DEBOER, JENNIFER ELIZAB	10/3/2025	Value	1,785,600	1,479,800	(305,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,920.86	7,393.08	(1,527.78)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,920.86	7,393.08	(1,527.78)	0.00	

Correction Listing Report

Union County

Page 56 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001009	06186042	RE	2025	ROXON, JACOB CHRISTOPHER	10/6/2025	Value	896,300	787,500	(108,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,164.21	3,658.73	(505.48)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,164.21	3,658.73	(505.48)	0.00	
2025001172	06186179	RE	2025	TRUBINSKY, LORI S & TRUBINSKY, JOHN A	10/16/2025	Value	834,800	779,500	(55,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,299.40	5,882.11	(417.29)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,299.40	5,882.11	(417.29)	0.00	
2025001059	06189013	RE	2025	CONN, JOHN JOSEPH	10/9/2025	Value	1,477,200	1,118,900	(358,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,694.73	5,828.35	(1,866.38)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,694.73	5,828.35	(1,866.38)	0.00	
2025001163	06189040	RE	2025	ZEPSA, BRIAN P & ZEPSA, DIANA L	10/16/2025	Value	1,838,200	1,316,400	(521,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	9,575.18	6,857.13	(2,718.05)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,575.18	6,857.13	(2,718.05)	0.00	
2025001057	06189063	RE	2025	SALE, ZANDRA JO & SALE, DAVID WILLIAM	10/9/2025	Value	1,663,300	1,268,000	(395,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,664.13	6,605.01	(2,059.12)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,664.13	6,605.01	(2,059.12)	0.00	
2025001058	06189064	RE	2025	PFAU, ROBERT GORDEN TRUSTE	10/9/2025	Value	1,660,800	1,266,700	(394,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,651.11	6,598.24	(2,052.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,651.11	6,598.24	(2,052.87)	0.00	

Correction Listing Report

Union County

Page 57 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001053	06189080	RE	2025	BUFF, JONATHAN TODD & BUFF, CYNTHIA STEWART	10/8/2025	Value	1,491,000	1,013,300	(477,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,766.62	5,278.28	(2,488.34)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,766.62	5,278.28	(2,488.34)	0.00	
2025001060	06189084	RE	2025	BEALS, RYAN E & BEALS, ELIZABETH R	10/9/2025	Value	1,453,700	1,021,400	(432,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,572.32	5,320.47	(2,251.85)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,572.32	5,320.47	(2,251.85)	0.00	
2025000979	06192017	RE	2025	OVERCASH, LOUISA C	10/3/2025	Value	520,000	468,800	(51,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,497.04	2,251.18	(245.86)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,497.04	2,251.18	(245.86)	0.00	
2025001405	06192317	RE	2025	JANCULA, DEBORAH & JANCULA, JEFFREY	10/22/2025	Value	798,100	746,200	(51,900)		CHANGE VALUE PER BER
Public Notes:						Tax	6,146.97	5,747.23	(399.74)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,146.97	5,747.23	(399.74)	0.00	
2025001142	06192620	RE	2025	CANTERO, HENRY & CANTERO, MAYRA	10/15/2025	Value	842,600	800,000	(42,600)		CHANGE VALUE PER BER
Public Notes:						Tax	6,489.71	6,161.60	(328.11)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,489.71	6,161.60	(328.11)	0.00	
2025001032	06198141	RE	2025	KAU, JANICE W & KAU, STEVEN Y	10/7/2025	Value	727,800	689,300	(38,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,381.36	3,202.49	(178.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,381.36	3,202.49	(178.87)	0.00	

Correction Listing Report

Union County

Page 58 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001126	06198345	RE	2025	LANDINI, JOSEPH & LANDINI, EVELYN	10/15/2025	Value	696,500	687,700	(8,800)		CHANGE VALUE PER BER
Public Notes:						Tax	3,235.94	3,195.05	(40.89)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,235.94	3,195.05	(40.89)	0.00	
2025001029	06198464	RE	2025	CASE, CAROLYN	10/7/2025	Value	790,800	742,100	(48,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,674.06	3,447.80	(226.26)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,674.06	3,447.80	(226.26)	0.00	
2025001162	06201308	RE	2025	ROSS, KIMBERLY MARIE & ROSS, JEFFREY L	10/15/2025	Value	983,100	959,000	(24,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,120.97	4,995.43	(125.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,120.97	4,995.43	(125.54)	0.00	
2025001130	06201517	RE	2025	PUTNAM, DONNA H & PUTNAM, STEVE	10/15/2025	Value	679,500	631,000	(48,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,156.96	2,931.63	(225.33)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,156.96	2,931.63	(225.33)	0.00	
2025001423	06201571	RE	2025	SIGLER, RACHEL & SIGLER, JUSTIN	10/22/2025	Value	929,500	887,400	(42,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,318.46	4,122.86	(195.60)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,318.46	4,122.86	(195.60)	0.00	
2025001064	06207097	RE	2025	PALINCAS, LIVIA & PALINCAS, LATIS VASILE	10/9/2025	Value	1,430,600	1,425,000	(5,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,646.57	6,620.55	(26.02)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,646.57	6,620.55	(26.02)	0.00	

Correction Listing Report

Union County

Page 59 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001056	06213032	RE	2025	DUNCAN, JEFFREY E & DUNCAN, MARGARET E	10/9/2025	Value	1,603,900	1,200,000	(403,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,354.72	6,250.80	(2,103.92)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,354.72	6,250.80	(2,103.92)	0.00	
2025001052	06213043	RE	2025	CARDONE, DOMINICK PETER & ACAMPORA-ROSSI, WENDI	10/8/2025	Value	1,885,100	1,282,000	(603,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	9,819.49	6,677.94	(3,141.55)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,819.49	6,677.94	(3,141.55)	0.00	
2025001271	06222009B	RE	2025	SHAW, ANDREW M & SHAW, KATHRYN A	10/20/2025	Value	2,053,300	1,670,600	(382,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	10,695.64	8,702.16	(1,993.48)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	10,695.64	8,702.16	(1,993.48)	0.00	
2025001132	06222019	RE	2025	LEON, MICHAEL ALFREDO	10/15/2025	Value	1,937,000	1,843,000	(94,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	10,089.83	9,600.19	(489.64)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	10,089.83	9,600.19	(489.64)	0.00	
2025001164	06222057	RE	2025	BROWN, G CHRIS & BROWN, MARY JO	10/16/2025	Value	1,030,000	977,200	(52,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,365.27	5,090.23	(275.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,365.27	5,090.23	(275.04)	0.00	
2025001301	06225105	RE	2025	CIULLA, KAREN A & CIULLA, JEFFREY D	10/20/2025	Value	1,485,200	1,440,100	(45,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,900.24	6,690.70	(209.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,900.24	6,690.70	(209.54)	0.00	

Correction Listing Report

Union County

Page 60 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001133	06225426	RE	2025	HERRERA, STEPHEN M & HERRERA, JULIE M	10/15/2025	Value	1,720,700	1,690,200	(30,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,994.37	7,852.67	(141.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,994.37	7,852.67	(141.70)	141.70	
2025000995	06228036	RE	2025	KASIREDDY, PALLAVI & KASIREDDY, VISHNUVARDHA	10/3/2025	Value	4,676,900	4,034,000	(642,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	21,728.88	18,741.96	(2,986.92)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	21,728.88	18,741.96	(2,986.92)	0.00	
2025001422	06228047	RE	2025	MOORE, JOANNE & MOORE, BRUCE	10/22/2025	Value	4,054,500	3,341,900	(712,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	18,837.21	15,526.47	(3,310.74)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	18,837.21	15,526.47	(3,310.74)	0.00	
2025001062	06228082	RE	2025	CICCARELLI, SHELLY K & CICCARELLI, THOMAS SCOT	10/9/2025	Value	2,074,000	1,995,000	(79,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	9,635.80	9,268.77	(367.03)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,635.80	9,268.77	(367.03)	367.03	
2025001404	06228129	RE	2025	SANDERSON, ANNETTE M 1997	10/22/2025	Value	2,429,900	2,208,000	(221,900)		CHANGE VALUE PER BER
Public Notes:						Tax	11,289.32	10,258.37	(1,030.95)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	11,289.32	10,258.37	(1,030.95)	0.00	
2025001166	06240078	RE	2025	TARULLI, DIANE C & TARULLI, JAMES C	10/16/2025	Value	2,428,400	2,150,000	(278,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	12,649.54	11,199.35	(1,450.19)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	12,649.54	11,199.35	(1,450.19)	0.00	

Correction Listing Report

Union County

Page 61 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001065	06240094	RE	2025	DUNN, BRADLEY MICHAEL & DUNN, BRIANNA KATHLEEN	10/9/2025	Value	1,439,000	1,281,000	(158,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,495.75	6,672.73	(823.02)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,495.75	6,672.73	(823.02)	0.00	
2025001167	06240170	RE	2025	MAMAJEK, RICHARD & MAMAJEK, TONI	10/16/2025	Value	1,801,600	1,733,800	(67,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	9,384.53	9,031.36	(353.17)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,384.53	9,031.36	(353.17)	0.00	
2025000994	06240252	RE	2025	JCH OP LLC	10/3/2025	Value	1,348,700	529,200	(819,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,025.38	2,756.60	(4,268.78)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,025.38	2,756.60	(4,268.78)	0.00	
2025000999	06240254	RE	2025	JCH OP LLC	10/3/2025	Value	11,600	2,900	(8,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	60.42	15.11	(45.31)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	60.42	15.11	(45.31)	0.00	
2025001361	07003011B	RE	2025	THOMAS, SONYA C & THOMAS, MICHAEL H	10/21/2025	Value	907,200	717,800	(189,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,326.44	3,423.19	(903.25)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,326.44	3,423.19	(903.25)	0.00	
2025001006	07003012C	RE	2025	GOINS, STEVEN & GOINS, ANNA R	10/6/2025	Value	102,400	25,600	(76,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	662.43	165.61	(496.82)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	662.43	165.61	(496.82)	0.00	

Correction Listing Report

Union County

Page 62 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001018	07024018D	RE	2025	BRUTSKY, RITA & BRUTSKY, ANDREY	10/6/2025	Value	1,359,600	1,049,000	(310,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,483.93	5,002.68	(1,481.25)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,483.93	5,002.68	(1,481.25)	0.00	
2025001033	07036003B	RE	2025	EDWARDS, CINDY DENISE & EDWARDS, WENDY DAWN	10/7/2025	Value	244,600	210,100	(34,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,166.50	1,001.97	(164.53)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,166.50	1,001.97	(164.53)	0.00	
2025001184	07057664	RE	2025	SFR JV-2 2022-2 BORROWER L	10/16/2025	Value	440,300	401,500	(38,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,848.30	2,597.30	(251.00)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,848.30	2,597.30	(251.00)	0.00	
2025001186	07057774	RE	2025	BAF ASSETS 3 LLC	10/16/2025	Value	547,900	461,400	(86,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,544.37	2,984.80	(559.57)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,544.37	2,984.80	(559.57)	0.00	
2025001188	07057777	RE	2025	YAMASA CO LTD	10/16/2025	Value	479,600	433,600	(46,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,102.53	2,804.96	(297.57)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,102.53	2,804.96	(297.57)	219.37	
2025001191	07057778	RE	2025	2018-3 IH BORROWER LP	10/16/2025	Value	539,500	455,500	(84,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,490.03	2,946.63	(543.40)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,490.03	2,946.63	(543.40)	0.00	

Correction Listing Report

Union County

Page 63 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001193	07057789	RE	2025	FKH SFR PROPCO A L P	10/16/2025	Value	543,600	459,100	(84,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,516.55	2,969.92	(546.63)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,516.55	2,969.92	(546.63)	0.00	
2025001194	07057790	RE	2025	2018-4 IH BORROWER LP	10/16/2025	Value	486,800	429,300	(57,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,149.11	2,777.14	(371.97)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,149.11	2,777.14	(371.97)	0.00	
2025001196	07057793	RE	2025	PROGRESS RESIDENTIAL BORRO	10/16/2025	Value	492,200	432,000	(60,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,184.04	2,794.61	(389.43)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,184.04	2,794.61	(389.43)	287.09	
2025001199	07057807	RE	2025	PROGRESS RESIDENTIAL BORRO	10/16/2025	Value	480,000	427,900	(52,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,105.12	2,768.09	(337.03)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,105.12	2,768.09	(337.03)	248.46	
2025001461	07060091	RE	2024	SLAVIC EVANGELIC CHURCH EM	10/28/2025	Value	6,926,300	3,116,835	(3,809,465)		EXEMPTION STATUS CHANGE
Public Notes:						Tax	44,272.91	19,922.81	(24,350.10)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	44,272.91	19,922.81	(24,350.10)	0.00	
2025001362	07063103	RE	2025	MOESTA, MATTHEW & MOESTA, EMILY HOWARD	10/21/2025	Value	460,700	401,100	(59,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,980.27	2,594.72	(385.55)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,980.27	2,594.72	(385.55)	0.00	

Correction Listing Report

Union County

Page 64 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001202	07063120	RE	2025	CPI / AMHERST SFR PROGRAM	10/16/2025	Value	411,700	367,800	(43,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,663.29	2,379.30	(283.99)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,663.29	2,379.30	(283.99)	0.00	
2025001204	07063970	RE	2025	RS RENTAL I LLC	10/16/2025	Value	608,400	535,300	(73,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,874.90	3,409.33	(465.57)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,874.90	3,409.33	(465.57)	0.00	
2025001173	07064441	RE	2025	SHARP, JOHN SAMUEL & SHARP, TONI LYNN	10/16/2025	Value	344,300	341,600	(2,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,192.85	2,175.65	(17.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,192.85	2,175.65	(17.20)	0.00	
2025001008	07075179	RE	2025	MILLER, KEITH & MILLER, MARYANN	10/6/2025	Value	1,067,200	1,000,000	(67,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,106.48	6,659.00	(447.48)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,106.48	6,659.00	(447.48)	0.00	
2025001416	07075215	RE	2025	ROCHESTER, WILLIAM D & ROCHESTER, BEVERLY R	10/22/2025	Value	1,000,400	805,000	(195,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,661.66	5,360.50	(1,301.16)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,661.66	5,360.50	(1,301.16)	1,301.16	
2025001180	07078005	RE	2025	MOYA-MENDEZ, EDGAR G & MOYA-MENDEZ, TEREASA	10/16/2025	Value	610,600	557,000	(53,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,087.36	3,728.56	(358.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,087.36	3,728.56	(358.80)	0.00	

Correction Listing Report

Union County

Page 65 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001363	07078009	RE	2025	LOCKLEAR, CYNTHIA IRENE & LOCKLEAR, WILBERT JR	10/21/2025	Value	918,600	748,600	(170,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,149.11	5,011.13	(1,137.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,149.11	5,011.13	(1,137.98)	0.00	
2025001418	07084273	RE	2025	LIQUID, MANAGEMENT LLC	10/22/2025	Value	52,000	39,400	(12,600)		CHANGE VALUE PER BER
Public Notes:						Tax	336.39	254.88	(81.51)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	336.39	254.88	(81.51)	0.00	
2025001417	07084274	RE	2025	LIQUID, MANAGEMENT LLC	10/22/2025	Value	52,000	39,400	(12,600)		CHANGE VALUE PER BER
Public Notes:						Tax	336.39	254.88	(81.51)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	336.39	254.88	(81.51)	0.00	
2025001411	07084328	RE	2025	LIQUID MANAGEMENT LLC	10/22/2025	Value	872,500	861,500	(11,000)		CHANGE VALUE PER BER
Public Notes:						Tax	5,674.74	5,603.20	(71.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,674.74	5,603.20	(71.54)	0.00	
2025001302	07084615	RE	2025	SCHULLERY, ROSEMARY R & SCHULLERY, JOHN F	10/20/2025	Value	400,000	356,900	(43,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,601.60	2,321.28	(280.32)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,601.60	2,321.28	(280.32)	0.00	
2025000985	07087071	RE	2025	SV BRADLEY PROPERTIES LLC	10/3/2025	Value	409,500	375,900	(33,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,663.39	2,444.85	(218.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,663.39	2,444.85	(218.54)	0.00	

Correction Listing Report

Union County

Page 66 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001207	07090017	RE	2025	CPBESSEAS ENTITIES LLC	10/16/2025	Value	1,492,400	1,469,600	(22,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,169.49	7,059.96	(109.53)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,169.49	7,059.96	(109.53)	109.53	
2025001303	07090028	RE	2025	PRESSLEY, RANDY C & PRESSLEY, DEBORAH W	10/20/2025	Value	411,900	390,000	(21,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,693.00	2,549.82	(143.18)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,693.00	2,549.82	(143.18)	0.00	
2025001304	07090069	RE	2025	SARLOVSKIS, STANISLAV	10/20/2025	Value	706,000	526,400	(179,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,615.83	3,441.60	(1,174.23)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,615.83	3,441.60	(1,174.23)	0.00	
2025001305	07090677	RE	2025	BATES, LISA M & BATES, CLARENCE C	10/20/2025	Value	528,300	508,200	(20,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,454.03	3,322.61	(131.42)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,454.03	3,322.61	(131.42)	0.00	
2025001168	07090767	RE	2025	GRIMAUD, NATALIE & GRIMAUD, GEOFFREY	10/16/2025	Value	413,500	411,100	(2,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,703.46	2,687.77	(15.69)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,703.46	2,687.77	(15.69)	0.00	
2025001306	07091081	RE	2025	PRUNCHAK, ERIC & BERUTTI, LINDSIE	10/20/2025	Value	404,700	348,200	(56,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,632.17	2,264.69	(367.48)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,632.17	2,264.69	(367.48)	0.00	

Correction Listing Report

Union County

Page 67 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001234	07093576	RE	2025	SMOLUK, PAUL GREGORY	10/17/2025	Value	357,200	344,500	(12,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,335.37	2,252.34	(83.03)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,335.37	2,252.34	(83.03)	0.00	
2025001190	07099168	RE	2025	STEARNS, PAMELA SIMPSON	10/16/2025	Value	443,600	300,400	(143,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,969.46	2,010.88	(958.58)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,969.46	2,010.88	(958.58)	0.00	
2025001192	07102032D	RE	2025	MAK CORPORATION OF MONROE	10/16/2025	Value	9,487,900	4,550,000	(4,937,900)		CHANGE VALUE PER BER
Public Notes:						Tax	63,512.00	30,457.70	(33,054.30)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	63,512.00	30,457.70	(33,054.30)	0.00	
2025001263	07114029A	RE	2025	SIKES, CATHERINE LORRAINE	10/20/2025	Value	182,627	134,627	(48,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	877.34	646.75	(230.59)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	877.34	646.75	(230.59)	0.00	
2025001161	07114089A	RE	2025	KILLOUGH-ROHLEDER HOLDING	10/15/2025	Value	400,700	275,000	(125,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,606.15	1,788.60	(817.55)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,606.15	1,788.60	(817.55)	0.00	
2025001148	07114093	RE	2025	KILLOUGH, RAY BERNARD	10/15/2025	Value	448,600	320,300	(128,300)		CHANGE VALUE PER BER
Public Notes:						Tax	2,917.69	2,083.23	(834.46)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,917.69	2,083.23	(834.46)	0.00	

Correction Listing Report

Union County

Page 68 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001209	07114094	RE	2025	KILLOUGH, RAY BERNARD	10/16/2025	Value	158,700	137,500	(21,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,032.19	894.30	(137.89)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,032.19	894.30	(137.89)	0.00	
2025001239	07117017D	RE	2025	NIVENS, BRYAN R & NIVENS, REGINA M	10/17/2025	Value	502,500	395,400	(107,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,414.01	1,899.50	(514.51)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,414.01	1,899.50	(514.51)	0.00	
2025001240	07117024R	RE	2025	BYROM, JACOB REED	10/17/2025	Value	417,600	364,100	(53,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,006.15	1,749.14	(257.01)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,006.15	1,749.14	(257.01)	0.00	
2025000993	07117030A	RE	2025	WILLIAMS, VICTORIA & WILLIAMS, TREVOR	10/3/2025	Value	931,200	840,600	(90,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,473.48	4,038.24	(435.24)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,473.48	4,038.24	(435.24)	0.00	
2025000986	07117030C	RE	2025	WILLIAMS, KAREN BLANCHARD	10/3/2025	Value	571,500	507,200	(64,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,745.49	2,436.59	(308.90)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,745.49	2,436.59	(308.90)	0.00	
2025001400	07117034A	RE	2025	HELMS, SHIRLEY C & HELMS, LARRY STEVEN	10/22/2025	Value	1,375,500	1,102,000	(273,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,607.90	5,294.01	(1,313.89)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,607.90	5,294.01	(1,313.89)	0.00	

Correction Listing Report

Union County

Page 69 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001241	07117042	RE	2025	AGNEW, PARTICK J & AGNEW, CAROL L	10/17/2025	Value	848,400	791,800	(56,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,517.99	5,149.87	(368.12)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,517.99	5,149.87	(368.12)	0.00	
2025001242	07117079B	RE	2025	ALKEMEYER, KAREN & ALKEMEYER, MICHAEL G	10/17/2025	Value	991,300	906,000	(85,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,762.21	4,352.42	(409.79)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,762.21	4,352.42	(409.79)	0.00	
2025000978	07117224	RE	2025	BROOKS, CHARLIE S	10/3/2025	Value	661,400	614,100	(47,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,301.75	3,994.11	(307.64)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,301.75	3,994.11	(307.64)	0.00	
2025001393	07117313	RE	2025	CONNOR, MARY	10/22/2025	Value	632,400	538,900	(93,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,113.13	3,505.01	(608.12)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,113.13	3,505.01	(608.12)	0.00	
2025001401	07117410	RE	2025	DESSALIGN, ERMIA ABRAHAM	10/22/2025	Value	406,800	392,800	(14,000)		CHANGE VALUE PER BER
Public Notes:						Tax	2,645.83	2,554.77	(91.06)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,645.83	2,554.77	(91.06)	67.26	
2025000989	07117500	RE	2025	VAN, WINKLE THOMAS W	10/3/2025	Value	455,800	415,300	(40,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,964.52	2,701.11	(263.41)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,964.52	2,701.11	(263.41)	0.00	

Correction Listing Report

Union County

Page 70 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001141	07117824	RE	2025	MATESICH, KERRIE M W & MATESICH, ERIC J	10/15/2025	Value	647,600	626,800	(20,800)		CHANGE VALUE PER BER
Public Notes:						Tax	4,211.99	4,076.71	(135.28)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,211.99	4,076.71	(135.28)	0.00	
2025001407	07120006E	RE	2025	MCGONAGLE, TIMOTHY & MCGONAGLE, MICHELLE	10/22/2025	Value	937,600	675,000	(262,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,356.09	3,136.05	(1,220.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,356.09	3,136.05	(1,220.04)	0.00	
2025001243	07120131	RE	2025	ABBOTT, DANA LOUISE & ABBOTT, BUDDY LUTHER	10/17/2025	Value	629,300	593,900	(35,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,114.36	3,882.92	(231.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,114.36	3,882.92	(231.44)	0.00	
2025001402	07121153	RE	2025	MATTHEWS, LUNDIN RAY & MATTHEWS, JODIE KAYE	10/22/2025	Value	508,700	497,100	(11,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,461.09	2,404.97	(56.12)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,461.09	2,404.97	(56.12)	0.00	
2025000983	07123278	RE	2025	TEEL, ELIZABETH & TEEL, JEREMY	10/3/2025	Value	545,400	465,800	(79,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,461.11	2,955.97	(505.14)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,461.11	2,955.97	(505.14)	0.00	
2025001244	07123334	RE	2025	LOVELESS, WILLIAM K & LOVELESS, HOLLY K	10/17/2025	Value	695,200	599,000	(96,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,411.74	3,801.25	(610.49)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,411.74	3,801.25	(610.49)	0.00	

Correction Listing Report

Union County

Page 71 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001246	07123336	RE	2025	POWELL, STEPHEN F	10/17/2025	Value	663,700	584,500	(79,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,211.84	3,709.24	(502.60)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,211.84	3,709.24	(502.60)	0.00	
2025001247	07126064	RE	2025	AYALA, JESUS & AYALA, YESENIA	10/17/2025	Value	461,900	382,300	(79,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,091.96	2,559.12	(532.84)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,091.96	2,559.12	(532.84)	0.00	
2025000987	07126076	RE	2025	FOUR CORNERS OF CHARLOTTE	10/3/2025	Value	561,200	398,600	(162,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,756.67	2,668.23	(1,088.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,756.67	2,668.23	(1,088.44)	0.00	
2025001248	07126138	RE	2025	WOOTEN, ERNEST DANIEL	10/17/2025	Value	308,400	258,400	(50,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,064.43	1,729.73	(334.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,064.43	1,729.73	(334.70)	0.00	
2025001250	07129191	RE	2025	ALEXANDER, WILLIAM LARRY	10/17/2025	Value	175,000	165,600	(9,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,171.45	1,108.53	(62.92)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,171.45	1,108.53	(62.92)	0.00	
2025001409	07129343	RE	2025	STALLINGS POINTE LLC	10/22/2025	Value	2,367,600	1,555,800	(811,800)		CHANGE VALUE PER BER
Public Notes:						Tax	15,848.71	10,414.53	(5,434.18)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	15,848.71	10,414.53	(5,434.18)	0.00	

Correction Listing Report

Union County

Page 72 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000990	07129532	RE	2025	TSAREVSKIY, LIYA & TSAREVSKIY, ALEKSEY	10/3/2025	Value	753,500	566,200	(187,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,900.76	3,682.56	(1,218.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,900.76	3,682.56	(1,218.20)	0.00	
2025001177	07129661	RE	2025	WILLIAM, DEBORAH R	10/16/2025	Value	400,300	397,300	(3,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,679.61	2,659.53	(20.08)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,679.61	2,659.53	(20.08)	0.00	
2025001249	07129805	RE	2025	PRESTON, PATRICIA ANN	10/17/2025	Value	438,000	422,300	(15,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,931.97	2,826.88	(105.09)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,931.97	2,826.88	(105.09)	0.00	
2025001061	07129944	RE	2025	MICKEL, SUSAN J	10/9/2025	Value	308,100	294,200	(13,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,062.42	1,969.37	(93.05)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,062.42	1,969.37	(93.05)	0.00	
2025001251	07130004	RE	2025	LEADEM, KAREN & LEADEM, MARK	10/17/2025	Value	372,100	355,300	(16,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,490.84	2,378.38	(112.46)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,490.84	2,378.38	(112.46)	0.00	
2025001252	07132009	RE	2025	COHEN, WAYNE & COHEN, WENDY	10/17/2025	Value	328,200	300,900	(27,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,134.61	1,957.05	(177.56)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,134.61	1,957.05	(177.56)	0.00	

Correction Listing Report

Union County

Page 73 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001253	07132011	RE	2025	POTTER, ROAD FARM LLC	10/17/2025	Value	337,700	234,200	(103,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,196.40	1,523.24	(673.16)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,196.40	1,523.24	(673.16)	0.00	
2025001254	07132012	RE	2025	POTTER ROAD FARM LLC	10/17/2025	Value	174,800	162,800	(12,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,136.90	1,058.85	(78.05)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,136.90	1,058.85	(78.05)	0.00	
2025000988	07132030I	RE	2025	BERTINO, TERRI A	10/3/2025	Value	593,600	485,800	(107,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,860.77	3,159.64	(701.13)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,860.77	3,159.64	(701.13)	0.00	
2025000984	07132150	RE	2025	SCHECHER, STEPHEN L & SCHECHER, DEBORAH L	10/3/2025	Value	348,900	336,300	(12,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,269.25	2,187.30	(81.95)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,269.25	2,187.30	(81.95)	0.00	
2025000981	07132161C	RE	2025	GARDNER, MAXINE E & GARDNER, BARRY	10/3/2025	Value	402,700	353,700	(49,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,619.16	2,300.46	(318.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,619.16	2,300.46	(318.70)	235.40	
2025001272	07132175	RE	2025	MOWRY, MONICA C	10/20/2025	Value	426,000	364,500	(61,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,770.70	2,370.71	(399.99)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,770.70	2,370.71	(399.99)	0.00	

Correction Listing Report

Union County

Page 74 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001355	07132201	RE	2025	MOLINELLI, ALEXA & LEWANDOWSKI, JONATHAN	10/21/2025	Value	429,000	415,900	(13,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,790.22	2,705.01	(85.21)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,790.22	2,705.01	(85.21)	0.00	
2025000991	07132220	RE	2025	INMAN, RICKY IVAN & INMAN, LINDA G	10/3/2025	Value	445,500	411,100	(34,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,897.53	2,673.79	(223.74)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,897.53	2,673.79	(223.74)	0.00	
2025000992	07132269	RE	2025	LEACH, HALLIE EDWARDS & LEACH, JACOB WILLIAM	10/3/2025	Value	433,700	419,700	(14,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,820.78	2,729.73	(91.05)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,820.78	2,729.73	(91.05)	0.00	
2025001403	07132305	RE	2025	THOMPSON, MERCY & BIANCHI, ANTHONY	10/22/2025	Value	452,500	414,900	(37,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,943.06	2,698.51	(244.55)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,943.06	2,698.51	(244.55)	0.00	
2025000982	07132426	RE	2025	MOORE, DOUGLAS W III & AUSTIN, GWEN S	10/3/2025	Value	434,800	421,500	(13,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,910.55	2,821.52	(89.03)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,910.55	2,821.52	(89.03)	0.00	
2025000953	07132469	RE	2025	BOISVERT, ALYSSA & SCHERER, CHRISTIAN	10/2/2025	Value	460,400	431,300	(29,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,081.92	2,887.12	(194.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,081.92	2,887.12	(194.80)	0.00	

Correction Listing Report

Union County

Page 75 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001426	07135022C	RE	2025	MOORE, SANDRA JARRELL	10/22/2025	Value	651,151	592,751	(58,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,128.13	2,847.58	(280.55)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,128.13	2,847.58	(280.55)	0.00	
2025001356	07135033	RE	2025	PARKER, STEPHANIE A	10/21/2025	Value	366,300	328,400	(37,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,382.42	2,135.91	(246.51)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,382.42	2,135.91	(246.51)	0.00	
2025001357	07135034	RE	2025	PARKER, JACKIE S	10/21/2025	Value	235,000	214,100	(20,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,528.44	1,392.51	(135.93)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,528.44	1,392.51	(135.93)	0.00	
2025001394	07138003A	RE	2025	PITT, STEPHEN E JR & PITT, ABBIE MOORE	10/22/2025	Value	454,700	388,900	(65,800)		CHANGE VALUE PER BER
Public Notes:						Tax	2,184.38	1,868.28	(316.10)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,184.38	1,868.28	(316.10)	0.00	
2025001364	07138281	RE	2025	MARCHILDON, MONICA M & MARCHILDON, DANIEL W	10/21/2025	Value	500,400	474,300	(26,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,437.45	2,310.32	(127.13)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,437.45	2,310.32	(127.13)	0.00	
2025000980	07144044	RE	2025	DOMINI, KYLE R	10/3/2025	Value	383,900	326,800	(57,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,569.83	2,187.60	(382.23)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,569.83	2,187.60	(382.23)	0.00	

Correction Listing Report

Union County

Page 76 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001170	07144197	RE	2025	LINEBACK, MARTHA & BREITZMAN, NOAH	10/16/2025	Value	679,600	347,500	(332,100)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	4,549.24	2,326.17	(2,223.07)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,549.24	2,326.17	(2,223.07)	0.00	
2025001273	07144468	RE	2025	DEAN, BRIAN SCOTT & DEAN, AUBREY J	10/20/2025	Value	622,300	591,000	(31,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,165.68	3,956.15	(209.53)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,165.68	3,956.15	(209.53)	0.00	
2025001214	07147114	RE	2025	BAILEY, SUSANA E	10/16/2025	Value	182,300	74,100	(108,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,185.68	481.95	(703.73)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,185.68	481.95	(703.73)	0.00	
2025001365	07147756	RE	2025	AQUINO, ELENA & AQUINO, DANIEL	10/21/2025	Value	1,378,800	1,304,600	(74,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,967.72	8,485.12	(482.60)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,967.72	8,485.12	(482.60)	0.00	
2025001274	07147892	RE	2025	SHORT, KATHY A & SHORT, SANDRA S	10/20/2025	Value	710,900	632,100	(78,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,758.76	4,231.28	(527.48)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,758.76	4,231.28	(527.48)	0.00	
2025001043	07150039	RE	2025	CHILDERS, CHRISTOPHER B	10/8/2025	Value	614,300	485,800	(128,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,995.41	3,159.64	(835.77)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,995.41	3,159.64	(835.77)	617.32	

Correction Listing Report

Union County

Page 77 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001125	07150071	RE	2025	PRESSON, HEATHER & PRESSON, JONATHAN	10/15/2025	Value	931,800	829,300	(102,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,655.27	4,143.18	(512.09)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,655.27	4,143.18	(512.09)	0.00	
2025001098	07150076	RE	2025	PARAMORE, ROBERT EVETT TRU & PARAMORE, JENNIFER SOUL	10/15/2025	Value	1,235,400	1,012,900	(222,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,172.06	5,060.45	(1,111.61)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,172.06	5,060.45	(1,111.61)	0.00	
2025001408	07150090	RE	2025	JOHNSTON, FREDERICK D JR & JOHNSTON, MARY KATHERIN	10/22/2025	Value	958,400	752,100	(206,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,788.17	3,757.49	(1,030.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,788.17	3,757.49	(1,030.68)	0.00	
2025001269	07150109	RE	2025	KISER, ROSEMARY & KISER, FLAY STEVEN	10/20/2025	Value	741,900	637,700	(104,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,706.53	3,185.95	(520.58)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,706.53	3,185.95	(520.58)	0.00	
2025001128	07150277	RE	2025	HOLLOWAY, DANIELLE DAYTON & HOLLOWAY, JONATHAN WALT	10/15/2025	Value	1,107,400	1,054,800	(52,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,202.53	6,860.42	(342.11)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,202.53	6,860.42	(342.11)	0.00	
2025001140	07150639	RE	2025	SACKS, STEVEN T & SACKS, NIKKI	10/15/2025	Value	1,196,100	1,175,300	(20,800)		CHANGE VALUE PER BER
Public Notes:						Tax	5,975.72	5,871.80	(103.92)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,975.72	5,871.80	(103.92)	0.00	

Correction Listing Report

Union County

Page 78 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001366	08051006E	RE	2025	ENGEL, JENNIFER R & ENGEL, ROBERT A	10/21/2025	Value	820,600	801,800	(18,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,148.13	4,053.10	(95.03)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,148.13	4,053.10	(95.03)	0.00	
2025001155	08075011	RE	2025	BRASWELL, DAVID ELTON & BRASWELL, WILLIAM WELDO	10/15/2025	Value	454,400	418,300	(36,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,218.38	2,042.14	(176.24)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,218.38	2,042.14	(176.24)	0.00	
2025001156	08081002A	RE	2025	GOODMAN, RICHARD J	10/15/2025	Value	321,900	282,600	(39,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,571.52	1,379.65	(191.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,571.52	1,379.65	(191.87)	0.00	
2025001189	08108009A	RE	2025	DEESE, MICHELLE & DEESE, RICHARD W	10/16/2025	Value	475,900	416,900	(59,000)		CHANGE VALUE PER BER
Public Notes:						Tax	2,323.34	2,035.31	(288.03)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,323.34	2,035.31	(288.03)	0.00	
2025001157	08126010B	RE	2025	BENTON, AMY TALBERT & BENTON, JAMES LYNN	10/15/2025	Value	191,600	177,800	(13,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	973.72	903.58	(70.14)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	973.72	903.58	(70.14)	0.00	
2025001158	08165013	RE	2025	BENTON, JAMES LYNN & BENTON, AMY T	10/15/2025	Value	266,700	162,500	(104,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,355.37	825.83	(529.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,355.37	825.83	(529.54)	0.00	

Correction Listing Report

Union County

Page 79 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001159	08195012	RE	2025	OUTEN, DORIS M TRUSTEE	10/15/2025	Value	52,200	35,000	(17,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	265.28	177.87	(87.41)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	265.28	177.87	(87.41)	0.00	
2025001233	08198007	RE	2025	BYRUM, TERESA CROOK & CROOK, MICHAEL E	10/17/2025	Value	94,500	25,700	(68,800)		CHANGE VALUE PER BER
Public Notes:						Tax	480.25	130.61	(349.64)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	480.25	130.61	(349.64)	0.00	
2025001108	08198007	RE	2025	BYRUM, TERESA CROOK & CROOK, MICHAEL E	10/15/2025	Value	340,800	94,500	(246,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,731.95	480.25	(1,251.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,731.95	480.25	(1,251.70)	0.00	
2025001147	08201012	RE	2025	SMITH, JOHN NEAL JR & SMITH, JULIE H	10/15/2025	Value	206,100	159,700	(46,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,047.40	811.59	(235.81)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,047.40	811.59	(235.81)	0.00	
2025001028	08225018	RE	2025	YOUNCE, LAURA H	10/7/2025	Value	1,648,600	1,183,300	(465,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,419.40	6,043.11	(2,376.29)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,419.40	6,043.11	(2,376.29)	0.00	
2025001463	08234018A	RE	2024	BROOKS, ERIC V & BROOKS, JULIE P	10/28/2025	Value	1,045,800	860,000	(185,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,066.47	5,811.02	(1,255.45)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,066.47	5,811.02	(1,255.45)	0.00	

Correction Listing Report

Union County

Page 80 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001000	08264021H	RE	2025	MARINO, KONAN J & MARINO, KARA G	10/3/2025	Value	1,440,500	1,092,000	(348,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,032.52	5,331.14	(1,701.38)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,032.52	5,331.14	(1,701.38)	0.00	
2025001421	08264022D	RE	2025	GREENE, FRANCES ALLEN	10/22/2025	Value	440,900	296,600	(144,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,240.65	1,507.32	(733.33)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,240.65	1,507.32	(733.33)	0.00	
2025001020	08267002J	RE	2025	STALLINGS, JEFFREY SHERRIL	10/6/2025	Value	350,100	220,500	(129,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,709.19	1,076.48	(632.71)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,709.19	1,076.48	(632.71)	0.00	
2025001399	08282011	RE	2025	LANEY, RUTH T	10/22/2025	Value	269,400	235,500	(33,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,375.83	1,202.70	(173.13)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,375.83	1,202.70	(173.13)	173.13	
2025001205	08285007	RE	2025	LITTLE, LEVONE	10/16/2025	Value	232,000	206,800	(25,200)		DUPLICATE ASSESSMENT
Public Notes:						Tax	1,106.41	986.23	(120.18)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,106.41	986.23	(120.18)	0.00	
2025001467	08291001	RE	2025	OPYRCHAL, GERALD F & BRYAN, VIRGINIA	10/29/2025	Value	613,700	595,900	(17,800)		CHANGE VALUE PER BER
Public Notes:						Tax	3,970.03	3,854.88	(115.15)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,970.03	3,854.88	(115.15)	0.00	

Correction Listing Report

Union County

Page 81 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001002	08294037	RE	2025	PARRISH, UMARIN	10/3/2025	Value	503,400	474,000	(29,400)		CHANGE VALUE PER BER
Public Notes:						Tax	2,400.71	2,260.51	(140.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,400.71	2,260.51	(140.20)	0.00	
2025001181	08300138	RE	2025	LEPINO, ALICIA B & LEPINO, MICHAEL	10/16/2025	Value	540,900	430,600	(110,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,728.55	3,764.31	(964.24)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,728.55	3,764.31	(964.24)	0.00	
2025001206	08309020C	RE	2025	GRIFFIN, ANTHONY C	10/16/2025	Value	4,377,300	4,064,000	(313,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	20,875.34	19,381.21	(1,494.13)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	20,875.34	19,381.21	(1,494.13)	0.00	
2025001208	08309020F	RE	2025	BIGHAM, MARGARET C & BIGHAM, KEVIN DWAYNE	10/16/2025	Value	4,773,900	3,402,300	(1,371,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	23,425.53	16,695.08	(6,730.45)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	23,425.53	16,695.08	(6,730.45)	6,730.45	
2025001139	08312205	RE	2025	WICK, MARY S & WICK, JON G	10/15/2025	Value	819,900	741,200	(78,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,459.71	4,935.65	(524.06)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,459.71	4,935.65	(524.06)	524.06	
2025001388	09018003	RE	2025	TREADAWAY, CALVIN EUGENE	10/22/2025	Value	155,600	111,300	(44,300)		CHANGE VALUE PER BER
Public Notes:						Tax	1,176.49	841.54	(334.95)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,176.49	841.54	(334.95)	0.00	

Correction Listing Report

Union County

Page 82 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001367	09022078	RE	2025	DORSEY, CHARLIE AUSTIN	10/21/2025	Value	79,600	63,400	(16,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	601.86	479.37	(122.49)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	601.86	479.37	(122.49)	0.00	
2025001144	09022079	RE	2025	HINSON, DESSIE HEIRS	10/15/2025	Value	121,300	69,300	(52,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	917.15	523.98	(393.17)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	917.15	523.98	(393.17)	0.00	
2025001368	09028006H	RE	2025	HUNTER, MONICA GRIFFIN & HUNTER, MATTHEW H	10/21/2025	Value	927,600	765,300	(162,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,694.58	3,873.18	(821.40)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,694.58	3,873.18	(821.40)	0.00	
2025001160	09040010	RE	2025	JOHNSON, JANET P	10/15/2025	Value	163,300	123,700	(39,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	826.46	626.04	(200.42)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	826.46	626.04	(200.42)	200.42	
2025001016	09057002Y	RE	2025	ONEILL, JOSEPH DONALD	10/6/2025	Value	59,800	2,800	(57,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	452.15	21.17	(430.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	452.15	21.17	(430.98)	0.00	
2025001135	09143007H	RE	2025	MORGAN MILL PARTNERS LLC	10/15/2025	Value	3,263,700	2,951,400	(312,300)		CHANGE VALUE PER BER
Public Notes:						Tax	28,531.27	25,801.14	(2,730.13)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	28,531.27	25,801.14	(2,730.13)	0.00	

Correction Listing Report

Union County

Page 83 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001410	09155001B	RE	2025	UC QOZB II LLC	10/22/2025	Value	1,767,300	1,327,900	(439,400)		CHANGE VALUE PER BER
Public Notes:						Tax	15,449.74	11,608.50	(3,841.24)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	15,449.74	11,608.50	(3,841.24)	0.00	
2025001201	09156026	RE	2025	JSK HOSPITALITY LLC	10/16/2025	Value	4,567,500	3,700,000	(867,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	39,929.09	32,345.40	(7,583.69)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	39,929.09	32,345.40	(7,583.69)	0.00	
2025001096	09159049	RE	2025	RUSSELL, DAVID NORMAN	10/15/2025	Value	135,000	13,500	(121,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,180.17	118.02	(1,062.15)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,180.17	118.02	(1,062.15)	0.00	
2025001040	09162010	RE	2025	DEAL, KENNETH & DEAL, SHERRIE	10/7/2025	Value	822,900	657,800	(165,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,193.79	5,750.49	(1,443.30)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,193.79	5,750.49	(1,443.30)	0.00	
2025001136	09177001	RE	2025	CONSTRUCTION FINANCIAL SER	10/15/2025	Value	1,524,300	1,387,800	(136,500)		CHANGE VALUE PER BER
Public Notes:						Tax	13,325.43	12,132.15	(1,193.28)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	13,325.43	12,132.15	(1,193.28)	0.00	
2025001200	09188095	RE	2025	ECONOMY, INN INC	10/16/2025	Value	1,805,500	1,200,000	(605,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	15,783.68	10,490.40	(5,293.28)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	15,783.68	10,490.40	(5,293.28)	0.00	

Correction Listing Report

Union County

Page 84 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001021	09189021	RE	2025	LITTLE, ROSALIE E	10/6/2025	Value	805,400	368,900	(436,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,040.81	3,224.92	(3,815.89)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,040.81	3,224.92	(3,815.89)	0.00	
2025001101	09191006A	RE	2025	BIRCHWOOD MONROE HOLDINGS	10/15/2025	Value	3,457,800	2,967,000	(490,800)		CHANGE VALUE PER BER
Public Notes:						Tax	30,228.09	25,937.51	(4,290.58)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	30,228.09	25,937.51	(4,290.58)	0.00	
2025001510	09195022A	RE	2025	WILLOW GLEN ROCKFORD LLC E & WILLOW GLEN WESTGATE LL	10/31/2025	Value	17,106,300	16,254,000	(852,300)		CHANGE VALUE PER BER
Public Notes:						Tax	149,543.27	142,092.47	(7,450.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	149,543.27	142,092.47	(7,450.80)	0.00	
2025001369	09195136A	RE	2025	HUNTER, BRENDA S	10/21/2025	Value	492,300	434,400	(57,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,303.69	3,797.52	(506.17)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,303.69	3,797.52	(506.17)	0.00	
2025001425	09198006	RE	2025	VILLAGE SQUARE INVESTORS L	10/22/2025	Value	16,150,000	15,000,000	(1,150,000)		CHANGE VALUE PER BER
Public Notes:						Tax	141,183.30	131,130.00	(10,053.30)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	141,183.30	131,130.00	(10,053.30)	0.00	
2025001373	09216037	RE	2025	STRAWN, SANDRA M	10/22/2025	Value	392,900	364,800	(28,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,434.73	3,189.08	(245.65)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,434.73	3,189.08	(245.65)	0.00	

Correction Listing Report

Union County

Page 85 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001374	09228159C	RE	2025	D K PROPERTIES OF UNION LL	10/22/2025	Value	120,400	78,400	(42,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,052.54	685.37	(367.17)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,052.54	685.37	(367.17)	182.37	
2025001145	09228169	RE	2025	MASSEY, MICHAEL SCOTT TRUS & MASSEY, RACHEL BRYANT T	10/15/2025	Value	128,400	119,800	(8,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,122.47	1,047.29	(75.18)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,122.47	1,047.29	(75.18)	0.00	
2025001307	09229016	RE	2025	OPERATION REACHOUT INC	10/20/2025	Value	225,600	0	(225,600)		EXEMPTION STATUS CHANGE
Public Notes:						Tax	1,972.20	0.00	(1,972.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,972.20	0.00	(1,972.20)	0.00	
2025001453	09229130	RE	2025	JT BURNS & CO LLC	10/27/2025	Value	366,000	259,300	(106,700)		CHANGE VALUE PER BER
Public Notes:						Tax	3,199.57	2,266.80	(932.77)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,199.57	2,266.80	(932.77)	0.00	
2025001375	09232153	RE	2025	PARKS, JANET S	10/22/2025	Value	347,900	309,700	(38,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,041.34	2,707.40	(333.94)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,041.34	2,707.40	(333.94)	165.86	
2025001420	09235029	RE	2025	K ODOM HOLDINGS LLC	10/22/2025	Value	424,300	271,600	(152,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,709.23	2,374.33	(1,334.90)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,709.23	2,374.33	(1,334.90)	0.00	

Correction Listing Report

Union County

Page 86 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001107	09253051	RE	2025	VANDERLIP, MARTY & VANDERLIP, TERESA	10/15/2025	Value	310,000	183,200	(126,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,499.78	886.32	(613.46)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,499.78	886.32	(613.46)	0.00	
2025001391	09259001	RE	2025	TY-PAR REALTY INC	10/22/2025	Value	1,303,500	565,000	(738,500)		CHANGE VALUE PER BER
Public Notes:						Tax	11,395.20	4,939.23	(6,455.97)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	11,395.20	4,939.23	(6,455.97)	0.00	
2025001203	09261008B	RE	2025	SHRI, VASUDEV HOSPITALITY	10/16/2025	Value	17,333,200	11,721,700	(5,611,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	151,526.83	102,471.10	(49,055.73)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	151,526.83	102,471.10	(49,055.73)	0.00	
2025001197	09261017	RE	2025	SHRI KRISHNA INC	10/16/2025	Value	7,112,300	5,100,000	(2,012,300)		CHANGE VALUE PER BER
Public Notes:						Tax	62,175.73	44,584.20	(17,591.53)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	62,175.73	44,584.20	(17,591.53)	0.00	
2025001509	09264027	RE	2025	CHASE HERITAGE LLC & CHASE ROCKFORD LLC ET A	10/31/2025	Value	36,874,500	35,531,100	(1,343,400)		CHANGE VALUE PER BER
Public Notes:						Tax	322,356.88	310,612.88	(11,744.00)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	322,356.88	310,612.88	(11,744.00)	0.00	
2025001035	09273225	RE	2025	BAKER, ALEXIS VICTORIA & EVERSON, JON	10/7/2025	Value	899,500	666,900	(232,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,863.43	5,830.04	(2,033.39)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,863.43	5,830.04	(2,033.39)	0.00	

Correction Listing Report

Union County

Page 87 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001455	09276060	RE	2025	JT BURNS & CO LLC	10/27/2025	Value	780,900	541,200	(239,700)		CHANGE VALUE PER BER
Public Notes:						Tax	6,826.63	4,731.17	(2,095.46)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,826.63	4,731.17	(2,095.46)	0.00	
2025001376	09298056	RE	2025	PHILLIPS, DAVID & PHILLIPS, DARRELL	10/22/2025	Value	205,600	122,600	(83,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,797.36	1,071.77	(725.59)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,797.36	1,071.77	(725.59)	0.00	
2025001143	09298079B46	RE	2025	HARBIN, JAMES ANTHONY JR & HARBIN, JOAN LOUISE	10/15/2025	Value	237,300	230,000	(7,300)		CHANGE VALUE PER BER
Public Notes:						Tax	2,074.48	2,010.66	(63.82)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,074.48	2,010.66	(63.82)	31.70	
2025001508	09298362	RE	2025	CPAM PARK MONROE LLC	10/31/2025	Value	2,209,000	1,773,800	(435,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	19,311.08	15,506.56	(3,804.52)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	19,311.08	15,506.56	(3,804.52)	0.00	
2025001390	09301002	RE	2025	TY-PAR REALTY INC	10/22/2025	Value	5,509,000	5,115,700	(393,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	48,159.68	44,721.45	(3,438.23)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	48,159.68	44,721.45	(3,438.23)	0.00	
2025001198	09301002G	RE	2025	SREE-TBM-MONROE LLC	10/16/2025	Value	13,446,600	12,345,200	(1,101,400)		CHANGE VALUE PER BER
Public Notes:						Tax	117,550.18	107,921.74	(9,628.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	117,550.18	107,921.74	(9,628.44)	0.00	

Correction Listing Report

Union County

Page 88 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001137	09301033	RE	2025	ROLAND DRIVE INVESTMENTS L	10/15/2025	Value	774,900	631,800	(143,100)		CHANGE VALUE PER BER
Public Notes:						Tax	6,774.18	5,523.20	(1,250.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,774.18	5,523.20	(1,250.98)	0.00	
2025001377	09301173	RE	2025	SIMS, TRACY & SIMS, CHRISTOPHER	10/22/2025	Value	471,700	359,600	(112,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,123.60	3,143.62	(979.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,123.60	3,143.62	(979.98)	0.00	
2025001378	09301274	RE	2025	GUPTILL, JENNIFER P & GUPTILL, STEVEN D	10/22/2025	Value	705,400	573,500	(131,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,166.61	5,013.54	(1,153.07)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,166.61	5,013.54	(1,153.07)	0.00	
2025001379	09303021	RE	2025	SALMERON, JUAN FRANCISCO	10/22/2025	Value	512,700	428,500	(84,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,482.02	3,745.95	(736.07)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,482.02	3,745.95	(736.07)	0.00	
2025001398	09321018	RE	2025	BROWNING, HENRY BAXTER	10/22/2025	Value	273,900	257,400	(16,500)		CHANGE VALUE PER BER
Public Notes:						Tax	1,319.10	1,239.64	(79.46)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,319.10	1,239.64	(79.46)	0.00	
2025001380	09321428	RE	2025	CALLOWAY, GENNA ANN	10/22/2025	Value	329,500	328,200	(1,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,880.49	2,869.12	(11.37)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,880.49	2,869.12	(11.37)	0.00	

Correction Listing Report

Union County

Page 89 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001392	09336005	RE	2025	VILLAGE, SQ I & II LLC	10/22/2025	Value	671,900	436,500	(235,400)		CHANGE VALUE PER BER
Public Notes:						Tax	5,873.75	3,815.88	(2,057.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,873.75	3,815.88	(2,057.87)	0.00	
2025001381	09339004	RE	2025	THE MOORE BROTHERS PROPERT	10/22/2025	Value	413,500	354,700	(58,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,614.82	3,100.79	(514.03)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,614.82	3,100.79	(514.03)	255.31	
2025001382	09339050	RE	2025	MCCOY, KENSLEY	10/22/2025	Value	840,600	522,300	(318,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,348.53	4,565.95	(2,782.58)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,348.53	4,565.95	(2,782.58)	0.00	
2025001383	09339076	RE	2025	FINCHER, HEATHER M	10/22/2025	Value	520,700	385,600	(135,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,551.96	3,370.92	(1,181.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,551.96	3,370.92	(1,181.04)	0.00	
2025001384	09339086	RE	2025	SMITH, DAVID ALAN	10/22/2025	Value	385,200	348,000	(37,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,367.42	3,042.22	(325.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,367.42	3,042.22	(325.20)	161.52	
2025001385	09339087	RE	2025	MENSHCHIKOVA, ELENA & MENSHCHIKOV, VLADIMIR	10/22/2025	Value	619,200	513,600	(105,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,413.05	4,489.89	(923.16)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,413.05	4,489.89	(923.16)	0.00	

Correction Listing Report

Union County

Page 90 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001138	09342114	RE	2025	KLJ PROPERTIES LLC	10/15/2025	Value	1,211,000	909,800	(301,200)		CHANGE VALUE PER BER
Public Notes:						Tax	10,586.56	7,953.47	(2,633.09)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	10,586.56	7,953.47	(2,633.09)	0.00	
2025001036	09345004B	RE	2025	DECKER, LUCILA S MARIA & DECKER, RICHARD N	10/7/2025	Value	423,200	282,200	(141,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,699.61	2,466.99	(1,232.62)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,699.61	2,466.99	(1,232.62)	0.00	
2025001419	09345005A	RE	2025	HENRY, CURTIS & HENRY, LINDA PRESSLEY	10/22/2025	Value	205,900	162,100	(43,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	996.14	784.24	(211.90)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	996.14	784.24	(211.90)	0.00	
2025001275	09345044	RE	2025	JOHNSTON, JEREMIAH MACK	10/20/2025	Value	340,600	290,500	(50,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,647.82	1,405.44	(242.38)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,647.82	1,405.44	(242.38)	0.00	
2025001386	09348259	RE	2025	ALLMON, LISA & ALLMON, LARRY	10/22/2025	Value	679,500	531,800	(147,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,287.42	2,572.85	(714.57)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,287.42	2,572.85	(714.57)	0.00	
2025001038	09351016C	RE	2025	NEMANICH, MICHELLE ANN	10/7/2025	Value	570,300	427,300	(143,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,746.56	2,057.88	(688.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,746.56	2,057.88	(688.68)	0.00	

Correction Listing Report

Union County

Page 91 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001037	09351025A	RE	2025	ACKERLY, STACEY & ACKERLY, STEPHEN	10/7/2025	Value	461,200	338,100	(123,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,221.14	1,628.29	(592.85)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,221.14	1,628.29	(592.85)	0.00	
2025001022	09351126	RE	2025	TURNER, ROBERT LEONARD HEI	10/6/2025	Value	222,600	113,900	(108,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,072.04	548.54	(523.50)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,072.04	548.54	(523.50)	0.00	
2025001387	09351215	RE	2025	KOSTADINOV, STAS & ANDREEV, TONI	10/22/2025	Value	548,100	381,900	(166,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,651.71	1,847.63	(804.08)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,651.71	1,847.63	(804.08)	0.00	
2025001178	09351403	RE	2025	KODWANI, LUCKY & JAGWANI, SATISH KUMAR	10/16/2025	Value	488,200	466,100	(22,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,267.84	4,074.65	(193.19)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,267.84	4,074.65	(193.19)	0.00	
2025001031	09354131	RE	2025	CRAWFORD, DEBORAH B HEIRS	10/7/2025	Value	357,200	106,500	(250,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,720.28	512.90	(1,207.38)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,720.28	512.90	(1,207.38)	1,207.38	
2025001276	09372008	RE	2025	WILLIAMS, DONNA T	10/20/2025	Value	266,500	264,300	(2,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,289.33	1,278.68	(10.65)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,289.33	1,278.68	(10.65)	0.00	

Correction Listing Report

Union County

Page 92 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001396	09375018	RE	2025	WOLFE, LELAND MACK ET AL & WOLFE, JANET ROBB	10/22/2025	Value	272,000	219,200	(52,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,315.94	1,060.49	(255.45)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,315.94	1,060.49	(255.45)	0.00	
2025001395	09375020	RE	2025	WOLFE, JANET ROBB & WOLFE, LELAND MACK	10/22/2025	Value	231,900	204,800	(27,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,121.93	990.82	(131.11)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,121.93	990.82	(131.11)	0.00	
2025001277	09375066	RE	2025	BROOKS, DANNY PARNELL	10/20/2025	Value	47,000	30,600	(16,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	227.39	148.04	(79.35)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	227.39	148.04	(79.35)	0.00	
2025001280	09375067	RE	2025	BROOKS, DANNY PARNELL	10/20/2025	Value	47,100	30,600	(16,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	227.87	148.04	(79.83)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	227.87	148.04	(79.83)	0.00	
2025001281	09375070	RE	2025	BROOKS, DANNY PARNELL	10/20/2025	Value	47,400	30,800	(16,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	229.32	149.01	(80.31)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	229.32	149.01	(80.31)	0.00	
2025001397	09375132	RE	2025	WOLFE, JANET ROBB & WOLFE, LELAND MACK	10/22/2025	Value	210,400	193,500	(16,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,017.92	936.15	(81.77)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,017.92	936.15	(81.77)	0.00	

Correction Listing Report

Union County

Page 93 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001431	09375162	RE	2025	SNEAD, CHARLES FRANKLIN JR & SNEAD, DELANA TURNER	10/22/2025	Value	186,800	161,600	(25,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	903.74	781.82	(121.92)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	903.74	781.82	(121.92)	0.00	
2025001294	09402154	RE	2025	BUCKALEW, PATIA C & BUCKALEW, GERALD R JR	10/20/2025	Value	412,200	333,300	(78,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,994.22	1,612.51	(381.71)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,994.22	1,612.51	(381.71)	0.00	
2025001414	09405004B	RE	2025	ROBERTS, TRACY SHOCKLEY & CLEVINGER, JOHN M	10/22/2025	Value	670,200	563,700	(106,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,113.75	2,618.95	(494.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,113.75	2,618.95	(494.80)	0.00	
2025001428	09405004D	RE	2025	RODDEN, MICHAEL C & RODDEN, MARGARET RUTH	10/22/2025	Value	363,240	313,740	(49,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,749.37	1,510.98	(238.39)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,749.37	1,510.98	(238.39)	0.00	
2025001295	09405052	RE	2025	COHN, JOSEPH A & COHN, RACHEL M	10/20/2025	Value	483,500	389,200	(94,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,339.17	1,882.95	(456.22)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,339.17	1,882.95	(456.22)	0.00	
2025001413	09408054	RE	2025	BETZ, RENEE & BETZ, EUGENE M	10/22/2025	Value	792,900	647,400	(145,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,818.61	3,117.88	(700.73)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,818.61	3,117.88	(700.73)	0.00	

Correction Listing Report

Union County

Page 94 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001071	2785087	PP	2025	HANNAH, RICHARD EUGENE JR	10/9/2025	Value	25,987	16,706	(9,281)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	124.27	79.89	(44.38)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	124.27	79.89	(44.38)	0.00	
2025001119	304201	PP	2025	ALLEY, CHARLES THOMAS JR	10/15/2025	Value	78,077	75,227	(2,850)		CLERICAL ERROR
Public Notes:						Tax	390.07	375.83	(14.24)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	390.07	375.83	(14.24)	0.00	
2025001228	305222	PP	2025	ANDERSON, ROBIN JANSSEN & ANDERSON, SCOTT EUGENE	10/16/2025	Value	102,376	100,876	(1,500)		CLERICAL ERROR
Public Notes:						Tax	520.27	512.65	(7.62)		
						LL	52.03	51.27	(0.76)		
						INT	0.00	0.00	0.00		
						Tax TTL	572.30	563.92	(8.38)	0.00	
2025001432	334666	PP	2025	GARCIA, RENE	10/23/2025	Value	18,142	0	(18,142)		DUPLICATE ASSESSMENT
Public Notes:						Tax	118.61	0.00	(118.61)		
						LL	11.86	0.00	(11.86)		
						INT	0.00	0.00	0.00		
						Tax TTL	130.47	0.00	(130.47)	0.00	
2025001432	334666	PP	2024	GARCIA, RENE	10/23/2025	Value	6,553	0	(6,553)		DUPLICATE ASSESSMENT
Public Notes:						Tax	54.84	0.00	(54.84)		
						LL	5.48	0.00	(5.48)		
						INT	0.00	0.00	0.00		
						Tax TTL	60.32	0.00	(60.32)	46.98	
2025001432	334666	PP	2023	GARCIA, RENE	10/23/2025	Value	6,553	0	(6,553)		DUPLICATE ASSESSMENT
Public Notes:						Tax	54.08	0.00	(54.08)		
						LL	5.41	0.00	(5.41)		
						INT	0.00	0.00	0.00		
						Tax TTL	59.49	0.00	(59.49)	46.15	

Correction Listing Report

Union County

Page 95 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001432	334666	PP	2022	GARCIA, RENE	10/23/2025	Value	6,553	0	(6,553)		DUPLICATE ASSESSMENT
Public Notes:						Tax	52.90	0.00	(52.90)		
						LL	5.29	0.00	(5.29)		
						INT	0.00	0.00	0.00		
						Tax TTL	58.19	0.00	(58.19)	44.86	
2025001221	363878	PP	2025	MEDLIN, RODNEY DALE	10/16/2025	Value	6,000	2,000	(4,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	30.49	10.16	(20.33)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	30.49	10.16	(20.33)	0.00	
2025001459	376974	PP	2025	PRICE, MARTY GALE	10/28/2025	Value	8,045	3,348	(4,697)		SOLD PP ASSET
Public Notes:						Tax	40.88	17.01	(23.87)		
						LL	4.09	1.70	(2.39)		
						INT	0.00	0.00	0.00		
						Tax TTL	44.97	18.71	(26.26)	0.00	
2025001222	387887	PP	2024	SLOVAK, JOHN I	10/16/2025	Value	2,382	0	(2,382)		TAXPAYER MOVED
Public Notes:						Tax	15.82	0.00	(15.82)		
						LL	1.58	0.00	(1.58)		
						INT	0.00	0.00	0.00		
						Tax TTL	17.40	0.00	(17.40)	48.40	
2025000949	407967	PP	2022	C & C METALS INC	10/1/2025	Value	628,934	628,934	0		TMA AUDIT DISCOVERY
Public Notes:						Tax	7,201.92	7,201.92	0.00		
						LL	305.28	240.73	(64.55)		
						INT	0.00	0.00	0.00		
						Tax TTL	7,507.20	7,442.65	(64.55)	0.00	
2025001070	408206	PP	2025	CAROLINA LABRADOODLES LLC	10/9/2025	Value	14,849	0	(14,849)		BUSINESS CLOSED
Public Notes:						Tax	75.83	0.00	(75.83)		
						LL	7.58	0.00	(7.58)		
						INT	0.00	0.00	0.00		
						Tax TTL	83.41	0.00	(83.41)	0.00	

Correction Listing Report

Union County

Page 96 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000976	408290	PP	2025	CAROTHERS HOLDING COMPANY	10/3/2025	Value	22,606	22,606	0		LATE LIST
Public Notes:						Tax	197.62	197.62	0.00		PENALTY CHANGE
						LL	19.76	0.00	(19.76)		
						INT	0.00	0.00	0.00		
						Tax TTL	217.38	197.62	(19.76)	0.00	
2025001311	409579	PP	2025	EGLOBALSALES LLC	10/21/2025	Value	5,202	0	(5,202)		TAXPAYER MOVED
Public Notes:						Tax	45.48	0.00	(45.48)		
						LL	4.55	0.00	(4.55)		
						INT	0.00	0.00	0.00		
						Tax TTL	50.03	0.00	(50.03)	0.00	
2025001003	410367	PP	2025	GREEN FROG WATERPROOFING L	10/6/2025	Value	13,106	0	(13,106)		TAX CODE CHANGE
Public Notes:						Tax	84.78	0.00	(84.78)		
						LL	8.48	0.00	(8.48)		
						INT	0.00	0.00	0.00		
						Tax TTL	93.26	0.00	(93.26)	0.00	
2025000967	410445	PP	2025	GS MINT/ A&D COINS	10/2/2025	Value	22,533	0	(22,533)		CLERICAL ERROR
Public Notes:						Tax	145.77	0.00	(145.77)		
						LL	14.58	0.00	(14.58)		
						INT	0.00	0.00	0.00		
						Tax TTL	160.35	0.00	(160.35)	118.21	
2025001024	412110	PP	2025	MARLIN LEASING CORPORATION	10/6/2025	Value	9,377	9,377	0		LATE LIST
Public Notes:						Tax	62.77	62.77	0.00		PENALTY CHANGE
						LL	4.22	0.00	(4.22)		
						INT	0.00	0.00	0.00		
						Tax TTL	66.99	62.77	(4.22)	0.00	
2025001444	412146	PP	2025	MARTIN IRRIGATION INC	10/27/2025	Value	4,762	0	(4,762)		BUSINESS CLOSED
Public Notes:						Tax	22.93	0.00	(22.93)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	22.93	0.00	(22.93)	0.00	

Correction Listing Report

Union County

Page 97 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001068	413523	PP	2025	PRIME TRANSPORTATION LLC	10/9/2025	Value	81,922	0	(81,922)		SOLD PP ASSET
Public Notes:						Tax	519.88	0.00	(519.88)		
						LL	51.99	0.00	(51.99)		
						INT	0.00	0.00	0.00		
						Tax TTL	571.87	0.00	(571.87)	0.00	
2025000966	414203	PP	2025	SALEM LEASING CORP	10/2/2025	Value	3,288,470	3,136,884	(151,586)		SOLD PP ASSET
Public Notes:						Tax	28,747.80	27,422.64	(1,325.16)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	28,747.80	27,422.64	(1,325.16)	0.00	
2025000975	414254	PP	2025	SCI NORTH CAROLINA FUNERAL	10/3/2025	Value	117,053	117,053	0		LATE LIST
Public Notes:						Tax	1,023.28	1,023.28	0.00		PENALTY CHANGE
						LL	102.33	0.00	(102.33)		
						INT	0.00	0.00	0.00		
						Tax TTL	1,125.61	1,023.28	(102.33)	0.00	
2025000962	414274	PP	2025	SEALING AGENTS WATERPROOFI	10/2/2025	Value	11,855,181	11,749,975	(105,206)		CLERICAL ERROR
Public Notes:						Tax	76,691.17	76,010.59	(680.58)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	76,691.17	76,010.59	(680.58)	0.00	
2025001069	415877	PP	2025	W S BADCOCK CORP	10/9/2025	Value	1,048	0	(1,048)		BUSINESS CLOSED
Public Notes:						Tax	9.16	0.00	(9.16)		
						LL	0.92	0.00	(0.92)		
						INT	0.00	0.00	0.00		
						Tax TTL	10.08	0.00	(10.08)	0.00	
2025001310	577475	PP	2023	TRAN, MINH VAN	10/20/2025	Value	831	0	(831)		BUSINESS CLOSED
Public Notes:						Tax	6.79	0.00	(6.79)		
						LL	0.68	0.00	(0.68)		
						INT	0.00	0.00	0.00		
						Tax TTL	7.47	0.00	(7.47)	0.00	

Correction Listing Report

Union County

Page 98 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001063	578132	PP	2025	HUNT, ROBERT	10/9/2025	Value	36,408	33,573	(2,835)		SOLD PP ASSET
Public Notes:						Tax	176.14	162.43	(13.71)		
						LL	17.61	16.24	(1.37)		
						INT	0.00	0.00	0.00		
						Tax TTL	193.75	178.67	(15.08)	0.00	
2025000955	578249	PP	2025	ROBERTO RUIZ HEATING & AIR	10/2/2025	Value	2,922	0	(2,922)		TAX CODE CHANGE
Public Notes:						Tax	19.10	0.00	(19.10)		
						LL	1.91	0.00	(1.91)		
						INT	0.00	0.00	0.00		
						Tax TTL	21.01	0.00	(21.01)	15.55	
2025000955	578249	PP	2024	ROBERTO RUIZ HEATING & AIR	10/2/2025	Value	4,286	0	(4,286)		TAX CODE CHANGE
Public Notes:						Tax	35.87	0.00	(35.87)		
						LL	3.59	0.00	(3.59)		
						INT	0.00	0.00	0.00		
						Tax TTL	39.46	0.00	(39.46)	30.74	
2025001442	589666	PP	2025	LEOS EXPRESS LOGISTICS LLC	10/24/2025	Value	384,754	330,997	(53,757)		SOLD PP ASSET
Public Notes:						Tax	3,363.52	3,050.22	(313.30)		
						LL	336.35	305.00	(31.35)		
						INT	0.00	0.00	0.00		
						Tax TTL	3,699.87	3,355.22	(344.65)	0.00	
2025001227	592504	PP	2025	REASONABLE AUTO CARRIER CO	10/16/2025	Value	34,744	29,961	(4,783)		CLERICAL ERROR
Public Notes:						Tax	177.44	153.01	(24.43)		
						LL	17.74	15.30	(2.44)		
						INT	0.00	0.00	0.00		
						Tax TTL	195.18	168.31	(26.87)	0.00	
2025000959	600435	PP	2025	ALLIANCE VAN LINES LLC	10/2/2025	Value	9,185	0	(9,185)		SOLD PP ASSET
Public Notes:						Tax	61.48	0.00	(61.48)		
						LL	6.15	0.00	(6.15)		
						INT	0.00	0.00	0.00		
						Tax TTL	67.63	0.00	(67.63)	0.00	

Correction Listing Report

Union County

Page 99 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001371	606106	PP	2025	C BROOKS TRANSPORTATION, L	10/22/2025	Value	34,982	22,378	(12,604)		SOLD PP ASSET
Public Notes:						Tax	227.52	145.55	(81.97)		
						LL	22.75	14.55	(8.20)		
						INT	0.00	0.00	0.00		
						Tax TTL	250.27	160.10	(90.17)	0.00	
2025000970	613761	PP	2025	MACHINA, BARBARA SUSAN	10/2/2025	Value	1,000	0	(1,000)		SOLD PP ASSET
Public Notes:						Tax	7.70	0.00	(7.70)		
						LL	0.77	0.00	(0.77)		
						INT	0.00	0.00	0.00		
						Tax TTL	8.47	0.00	(8.47)	0.00	
2025000970	613761	PP	2024	MACHINA, BARBARA SUSAN	10/2/2025	Value	1,000	0	(1,000)		SOLD PP ASSET
Public Notes:						Tax	10.25	0.00	(10.25)		
						LL	1.03	0.00	(1.03)		
						INT	0.00	0.00	0.00		
						Tax TTL	11.28	0.00	(11.28)	0.00	
2025001260	614278	PP	2025	LEWIS TREE SERVICE INC	10/20/2025	Value	71,363	0	(71,363)		SOLD PP ASSET
Public Notes:						Tax	364.45	0.00	(364.45)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	364.45	0.00	(364.45)	0.00	
2025001372	615949	PP	2025	MARLIN LEASING CORPORATION	10/22/2025	Value	1,805	334	(1,471)		CLERICAL ERROR
Public Notes:						Tax	9.17	1.70	(7.47)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9.17	1.70	(7.47)	0.00	
2025000958	620705	PP	2025	SMITH, TERRY LYNN	10/2/2025	Value	9,477	6,561	(2,916)		SOLD PP ASSET
Public Notes:						Tax	48.16	33.34	(14.82)		
						LL	4.82	3.33	(1.49)		
						INT	0.00	0.00	0.00		
						Tax TTL	52.98	36.67	(16.31)	0.00	

Correction Listing Report

Union County

Page 100 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001225	625389	PP	2025	FKH SFR PROPCOG, L.P.	10/16/2025	Value	5,375	1,792	(3,583)		CLERICAL ERROR
Public Notes:						Tax	46.99	15.67	(31.32)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	46.99	15.67	(31.32)	0.00	
2025001223	625391	PP	2025	FKH SFR PROPCOG, L.P.	10/16/2025	Value	7,167	1,792	(5,375)		CLERICAL ERROR
Public Notes:						Tax	46.86	11.72	(35.14)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	46.86	11.72	(35.14)	0.00	
2025001218	625452	PP	2025	FKH SFR PROPCO I, L.P.	10/16/2025	Value	7,167	4,859	(2,308)		CLERICAL ERROR
Public Notes:						Tax	46.36	31.43	(14.93)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	46.36	31.43	(14.93)	0.00	
2025001446	625708	PP	2025	LOVINGS, SHELBY DENESSA	10/27/2025	Value	19,539	0	(19,539)		SOLD PP ASSET
Public Notes:						Tax	98.89	0.00	(98.89)		
						LL	9.89	0.00	(9.89)		
						INT	0.00	0.00	0.00		
						Tax TTL	108.78	0.00	(108.78)	0.00	
2025000972	630926	PP	2025	BASS, WILLIAM HENRY	10/2/2025	Value	1,470	0	(1,470)		TAXPAYER MOVED
Public Notes:						Tax	9.61	0.00	(9.61)		
						LL	0.96	0.00	(0.96)		
						INT	0.00	0.00	0.00		
						Tax TTL	10.57	0.00	(10.57)	0.00	
2025000961	631463	PP	2025	BOING US HOLDCO INC	10/2/2025	Value	729,315	729,315	0		LATE LIST
Public Notes:						Tax	6,375.67	6,375.67	0.00		PENALTY CHANGE
						LL	637.57	0.00	(637.57)		
						INT	0.00	0.00	0.00		
						Tax TTL	7,013.24	6,375.67	(637.57)	0.00	

Correction Listing Report

Union County

Page 101 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001092	631550	PP	2025	THE BUILDING BLOCKS CENTER & ALSTON, WALLACE	10/14/2025	Value	763,022	47,056	(715,966)		CLERICAL ERROR
Public Notes:						Tax	6,670.34	411.36	(6,258.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,670.34	411.36	(6,258.98)	0.00	
2025001226	640425	PP	2025	BENMAC STUDIOS LLC	10/16/2025	Value	7,062	0	(7,062)		BUSINESS CLOSED
Public Notes:						Tax	46.17	0.00	(46.17)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	46.17	0.00	(46.17)	0.00	
2025001010	640872	PP	2025	2 MANY COMMAS LLC	10/6/2025	Value	2,000	0	(2,000)		TAXPAYER MOVED
Public Notes:						Tax	12.94	0.00	(12.94)		
						LL	1.29	0.00	(1.29)		
						INT	0.00	0.00	0.00		
						Tax TTL	14.23	0.00	(14.23)	0.00	
2025001007	648164	PP	2025	BANK CAPITAL SERVICES LLC	10/6/2025	Value	313,930	313,930	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	2,744.38	2,744.38	0.00		
						LL	274.44	0.00	(274.44)		
						INT	0.00	0.00	0.00		
						Tax TTL	3,018.82	2,744.38	(274.44)	0.00	
2025001441	652743	PP	2023		10/24/2025	Value	1,829	0	(1,829)		TAXPAYER MOVED
Public Notes:						Tax	19.95	0.00	(19.95)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	19.95	0.00	(19.95)	0.00	
2025001224	654956	PP	2025	FKH SFR N, LP	10/16/2025	Value	7,747	5,165	(2,582)		CLERICAL ERROR
Public Notes:						Tax	50.65	33.77	(16.88)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	50.65	33.77	(16.88)	0.00	

Correction Listing Report

Union County

Page 102 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000963	658038	PP	2025	BARRETT, LATORA LAJ	10/2/2025	Value	63,000	0	(63,000)		SOLD PP ASSET
Public Notes:						Tax	550.75	0.00	(550.75)		
						LL	55.08	0.00	(55.08)		
						INT	0.00	0.00	0.00		
						Tax TTL	605.83	0.00	(605.83)	0.00	
2025001229	658090	PP	2025	MARLIN LEASING CORPORATION	10/16/2025	Value	4,569	4,283	(286)		CLERICAL ERROR
Public Notes:						Tax	30.42	28.52	(1.90)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	30.42	28.52	(1.90)	0.00	
2025001017	658590	PP	2025	KINGSBRIDGE HOLDINGS LLC	10/6/2025	Value	1,063,560	1,061,755	(1,805)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	9,297.64	9,281.86	(15.78)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,297.64	9,281.86	(15.78)	0.00	
2025001296	659079	PP	2025	LOPOL FOODS INC	10/20/2025	Value	16,224	0	(16,224)		CLERICAL ERROR
Public Notes:						Tax	141.83	0.00	(141.83)		
						LL	14.18	0.00	(14.18)		
						INT	0.00	0.00	0.00		
						Tax TTL	156.01	0.00	(156.01)	0.00	
2025001322	660061	PP	2025	AHI BORROWER LP	10/28/2025	Value	34,904	34,904	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	268.83	268.83	0.00		
						LL	26.88	0.00	(26.88)		
						INT	0.00	0.00	0.00		
						Tax TTL	295.71	268.83	(26.88)	26.88	
2025001334	660063	PP	2025	AHI BORROWER LP	10/28/2025	Value	55,436	55,436	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	288.77	288.77	0.00		
						LL	28.88	0.00	(28.88)		
						INT	0.00	0.00	0.00		
						Tax TTL	317.65	288.77	(28.88)	28.88	

Correction Listing Report

Union County

Page 103 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001335	660065	PP	2025	AMH 2015-2 BORROWER LP	10/21/2025	Value	24,638	24,638	0		LATE LIST
Public Notes:						Tax	215.39	215.39	0.00		PENALTY CHANGE
						LL	21.54	0.00	(21.54)		
						INT	0.00	0.00	0.00		
						Tax TTL	236.93	215.39	(21.54)	10.70	
2025001336	660066	PP	2025	AMH 2015-2 BORROWER LP	10/28/2025	Value	14,372	14,372	0		LATE LIST
Public Notes:						Tax	93.96	93.96	0.00		PENALTY CHANGE
						LL	9.40	0.00	(9.40)		
						INT	0.00	0.00	0.00		
						Tax TTL	103.36	93.96	(9.40)	6.96	
2025001337	660067	PP	2025	AMH 2015-2 BORROWER LP	10/28/2025	Value	24,638	24,638	0		LATE LIST
Public Notes:						Tax	189.76	189.76	0.00		PENALTY CHANGE
						LL	18.98	0.00	(18.98)		
						INT	0.00	0.00	0.00		
						Tax TTL	208.74	189.76	(18.98)	18.98	
2025001338	660068	PP	2025	AMH 2015-2 BORROWER LP	10/28/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	13.35	13.35	0.00		PENALTY CHANGE
						LL	1.34	0.00	(1.34)		
						INT	0.00	0.00	0.00		
						Tax TTL	14.69	13.35	(1.34)	0.99	
2025001507	660069	PP	2025	AMH 2015-2 BORROWER LP	10/31/2025	Value	22,585	22,585	0		LATE LIST
Public Notes:						Tax	146.10	146.10	0.00		PENALTY CHANGE
						LL	14.61	0.00	(14.61)		
						INT	0.00	0.00	0.00		
						Tax TTL	160.71	146.10	(14.61)	10.77	
2025001312	660070	PP	2025	AMH 2015-2 BORROWER LP	10/21/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	27.49	27.49	0.00		PENALTY CHANGE
						LL	2.75	0.00	(2.75)		
						INT	0.00	0.00	0.00		
						Tax TTL	30.24	27.49	(2.75)	2.75	

Correction Listing Report

Union County

Page 104 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001313	660071	PP	2025	AMH 2015-2 BORROWER LP	10/28/2025	Value	22,585	22,585	0		LATE LIST
Public Notes:						Tax	109.27	109.27	0.00		PENALTY CHANGE
						LL	10.93	0.00	(10.93)		
						INT	0.00	0.00	0.00		
						Tax TTL	120.20	109.27	(10.93)	10.93	
2025001314	660072	PP	2025	AMH 2015-2 BORROWER LP	10/28/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	9.86	9.86	0.00		PENALTY CHANGE
						LL	0.99	0.00	(0.99)		
						INT	0.00	0.00	0.00		
						Tax TTL	10.85	9.86	(0.99)	0.99	
2025001315	660073	PP	2025	AMH 2015-2 BORROWER LP	10/28/2025	Value	8,213	8,213	0		LATE LIST
Public Notes:						Tax	52.31	52.31	0.00		PENALTY CHANGE
						LL	5.23	0.00	(5.23)		
						INT	0.00	0.00	0.00		
						Tax TTL	57.54	52.31	(5.23)	5.23	
2025001498	660074	PP	2025	AMH 2015-2 BORROWER LP	10/31/2025	Value	6,160	6,160	0		LATE LIST
Public Notes:						Tax	28.62	28.62	0.00		PENALTY CHANGE
						LL	2.86	0.00	(2.86)		
						INT	0.00	0.00	0.00		
						Tax TTL	31.48	28.62	(2.86)	2.86	
2025001497	660076	PP	2025	AMERICAN HOMES 4 RENT TRS	10/31/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	15.81	15.81	0.00		PENALTY CHANGE
						LL	1.58	0.00	(1.58)		
						INT	0.00	0.00	0.00		
						Tax TTL	17.39	15.81	(1.58)	1.58	
2025001499	660077	PP	2025	AMH ROMAN TWO NC LLC	10/31/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	10.69	10.69	0.00		PENALTY CHANGE
						LL	1.07	0.00	(1.07)		
						INT	0.00	0.00	0.00		
						Tax TTL	11.76	10.69	(1.07)	1.07	

Correction Listing Report

Union County

Page 105 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001500	660078	PP	2025	AMH ROMAN TWO NC LLC	10/31/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	13.35	13.35	0.00		PENALTY CHANGE
						LL	1.34	0.00	(1.34)		
						INT	0.00	0.00	0.00		
						Tax TTL	14.69	13.35	(1.34)	0.99	
2025001501	660104	PP	2025	AMERICAN HOMES 4 RENT PROP	10/31/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	15.81	15.81	0.00		PENALTY CHANGE
						LL	1.58	0.00	(1.58)		
						INT	0.00	0.00	0.00		
						Tax TTL	17.39	15.81	(1.58)	1.58	
2025001502	660105	PP	2025	AMERICAN HOMES 4 RENT PROP	10/31/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	26.56	26.56	0.00		PENALTY CHANGE
						LL	2.66	0.00	(2.66)		
						INT	0.00	0.00	0.00		
						Tax TTL	29.22	26.56	(2.66)	1.96	
2025001320	660106	PP	2025	AMERICAN RESIDENTIAL LEASI	10/28/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	15.81	15.81	0.00		PENALTY CHANGE
						LL	1.58	0.00	(1.58)		
						INT	0.00	0.00	0.00		
						Tax TTL	17.39	15.81	(1.58)	1.58	
2025001321	660107	PP	2025	AMH 2014-2 BORROWER LP	10/28/2025	Value	6,160	6,160	0		LATE LIST
Public Notes:						Tax	53.85	53.85	0.00		PENALTY CHANGE
						LL	5.39	0.00	(5.39)		
						INT	0.00	0.00	0.00		
						Tax TTL	59.24	53.85	(5.39)	2.68	
2025001323	660108	PP	2025	AMH 2014-2 BORROWER LP	10/21/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	31.62	31.62	0.00		PENALTY CHANGE
						LL	3.16	0.00	(3.16)		
						INT	0.00	0.00	0.00		
						Tax TTL	34.78	31.62	(3.16)	3.16	

Correction Listing Report

Union County

Page 106 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001330	660109	PP	2025	AMH 2014-2 BORROWER LP	10/28/2025	Value	8,213	8,213	0		LATE LIST
Public Notes:						Tax	53.70	53.70	0.00		PENALTY CHANGE
						LL	5.37	0.00	(5.37)		
						INT	0.00	0.00	0.00		
						Tax TTL	59.07	53.70	(5.37)	3.97	
2025001331	660110	PP	2025	AMH 2014-2 BORROWER LP	10/28/2025	Value	18,479	18,479	0		LATE LIST
Public Notes:						Tax	119.54	119.54	0.00		PENALTY CHANGE
						LL	11.95	0.00	(11.95)		
						INT	0.00	0.00	0.00		
						Tax TTL	131.49	119.54	(11.95)	8.81	
2025001324	660111	PP	2025	AMH 2014-2 BORROWER LP	10/28/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	26.06	26.06	0.00		PENALTY CHANGE
						LL	2.61	0.00	(2.61)		
						INT	0.00	0.00	0.00		
						Tax TTL	28.67	26.06	(2.61)	1.91	
2025001325	660112	PP	2025	AMH 2014-2 BORROWER LP	10/28/2025	Value	10,266	10,266	0		LATE LIST
Public Notes:						Tax	49.67	49.67	0.00		PENALTY CHANGE
						LL	4.97	0.00	(4.97)		
						INT	0.00	0.00	0.00		
						Tax TTL	54.64	49.67	(4.97)	4.97	
2025001326	660113	PP	2025	AMH 2014-2 BORROWER LP	10/28/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	13.08	13.08	0.00		PENALTY CHANGE
						LL	1.31	0.00	(1.31)		
						INT	0.00	0.00	0.00		
						Tax TTL	14.39	13.08	(1.31)	1.31	
2025001327	660115	PP	2025	AMH NC PROPERTIES TWO LP	10/28/2025	Value	55,436	55,436	0		LATE LIST
Public Notes:						Tax	484.62	484.62	0.00		PENALTY CHANGE
						LL	48.46	0.00	(48.46)		
						INT	0.00	0.00	0.00		
						Tax TTL	533.08	484.62	(48.46)	24.07	

Correction Listing Report

Union County

Page 107 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001328	660116	PP	2025	AMH NC PROPERTIES TWO LP	10/21/2025	Value	10,266	10,266	0		LATE LIST
Public Notes:						Tax	79.07	79.07	0.00		PENALTY CHANGE
						LL	7.91	0.00	(7.91)		
						INT	0.00	0.00	0.00		
						Tax TTL	86.98	79.07	(7.91)	7.91	
2025001329	660117	PP	2025	AMH NC PROPERTIES TWO LP	10/28/2025	Value	30,798	30,798	0		LATE LIST
Public Notes:						Tax	201.36	201.36	0.00		PENALTY CHANGE
						LL	20.14	0.00	(20.14)		
						INT	0.00	0.00	0.00		
						Tax TTL	221.50	201.36	(20.14)	14.90	
2025001332	660118	PP	2025	AMH NC PROPERTIES TWO LP	10/28/2025	Value	6,160	6,160	0		LATE LIST
Public Notes:						Tax	40.06	40.06	0.00		PENALTY CHANGE
						LL	4.01	0.00	(4.01)		
						INT	0.00	0.00	0.00		
						Tax TTL	44.07	40.06	(4.01)	2.96	
2025001333	660119	PP	2025	AMH NC PROPERTIES TWO LP	10/21/2025	Value	34,904	34,904	0		LATE LIST
Public Notes:						Tax	225.79	225.79	0.00		PENALTY CHANGE
						LL	22.58	0.00	(22.58)		
						INT	0.00	0.00	0.00		
						Tax TTL	248.37	225.79	(22.58)	16.65	
2025001316	660120	PP	2025	AMH NC PROPERTIES TWO LP	10/28/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	13.03	13.03	0.00		PENALTY CHANGE
						LL	1.30	0.00	(1.30)		
						INT	0.00	0.00	0.00		
						Tax TTL	14.33	13.03	(1.30)	0.95	
2025001317	660121	PP	2025	AMH NC PROPERTIES TWO LP	10/28/2025	Value	10,266	10,266	0		LATE LIST
Public Notes:						Tax	68.72	68.72	0.00		PENALTY CHANGE
						LL	6.87	0.00	(6.87)		
						INT	0.00	0.00	0.00		
						Tax TTL	75.59	68.72	(6.87)	6.87	

Correction Listing Report

Union County

Page 108 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001318	660122	PP	2025	AMH NC PROPERTIES TWO LP	10/28/2025	Value	6,160	6,160	0		LATE LIST
Public Notes:						Tax	41.02	41.02	0.00		PENALTY CHANGE
						LL	4.10	0.00	(4.10)		
						INT	0.00	0.00	0.00		
						Tax TTL	45.12	41.02	(4.10)	4.10	
2025001319	660123	PP	2025	AMH NC PROPERTIES TWO LP	10/28/2025	Value	45,170	45,170	0		LATE LIST
Public Notes:						Tax	217.54	217.54	0.00		PENALTY CHANGE
						LL	21.75	0.00	(21.75)		
						INT	0.00	0.00	0.00		
						Tax TTL	239.29	217.54	(21.75)	21.75	
2025001496	660124	PP	2025	AMH NC PROPERTIES TWO LP	10/31/2025	Value	24,638	24,638	0		LATE LIST
Public Notes:						Tax	119.20	119.20	0.00		PENALTY CHANGE
						LL	11.92	0.00	(11.92)		
						INT	0.00	0.00	0.00		
						Tax TTL	131.12	119.20	(11.92)	11.92	
2025001495	660125	PP	2025	AMH NC PROPERTIES TWO LP	10/31/2025	Value	10,266	10,266	0		LATE LIST
Public Notes:						Tax	49.32	49.32	0.00		PENALTY CHANGE
						LL	4.93	0.00	(4.93)		
						INT	0.00	0.00	0.00		
						Tax TTL	54.25	49.32	(4.93)	4.93	
2025001494	660126	PP	2025	AMH NC PROPERTIES TWO LP	10/31/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	9.54	9.54	0.00		PENALTY CHANGE
						LL	0.95	0.00	(0.95)		
						INT	0.00	0.00	0.00		
						Tax TTL	10.49	9.54	(0.95)	0.95	
2025001493	660127	PP	2025	AMH NC PROPERTIES TWO LP	10/31/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	13.08	13.08	0.00		PENALTY CHANGE
						LL	1.31	0.00	(1.31)		
						INT	0.00	0.00	0.00		
						Tax TTL	14.39	13.08	(1.31)	1.31	

Correction Listing Report

Union County

Page 109 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001492	660138	PP	2025	AMH 2014-3 BORROWER LP	10/31/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	17.95	17.95	0.00		PENALTY CHANGE
						LL	1.80	0.00	(1.80)		
						INT	0.00	0.00	0.00		
						Tax TTL	19.75	17.95	(1.80)	0.89	
2025001491	660139	PP	2025	AMH 2014-3 BORROWER LP	10/31/2025	Value	6,160	6,160	0		LATE LIST
Public Notes:						Tax	47.44	47.44	0.00		PENALTY CHANGE
						LL	4.74	0.00	(4.74)		
						INT	0.00	0.00	0.00		
						Tax TTL	52.18	47.44	(4.74)	4.74	
2025001490	660140	PP	2025	AMH 2014-3 BORROWER LP	10/31/2025	Value	36,958	36,958	0		LATE LIST
Public Notes:						Tax	241.63	241.63	0.00		PENALTY CHANGE
						LL	24.16	24.16	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	265.79	265.79	0.00	0.00	
2025001506	660141	PP	2025	AMH 2014-3 BORROWER LP	10/31/2025	Value	12,319	12,319	0		LATE LIST
Public Notes:						Tax	80.12	80.12	0.00		PENALTY CHANGE
						LL	8.01	0.00	(8.01)		
						INT	0.00	0.00	0.00		
						Tax TTL	88.13	80.12	(8.01)	5.92	
2025001505	660142	PP	2025	AMH 2014-3 BORROWER LP	10/31/2025	Value	47,224	47,224	0		LATE LIST
Public Notes:						Tax	305.49	305.49	0.00		PENALTY CHANGE
						LL	30.55	0.00	(30.55)		
						INT	0.00	0.00	0.00		
						Tax TTL	336.04	305.49	(30.55)	22.52	
2025001504	660143	PP	2025	AMH 2014-3 BORROWER LP	10/31/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	26.06	26.06	0.00		PENALTY CHANGE
						LL	2.61	0.00	(2.61)		
						INT	0.00	0.00	0.00		
						Tax TTL	28.67	26.06	(2.61)	1.91	

Correction Listing Report

Union County

Page 110 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001489	660144	PP	2025	AMH 2014-3 BORROWER LP	10/31/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	27.49	27.49	0.00		PENALTY CHANGE
						LL	2.75	0.00	(2.75)		
						INT	0.00	0.00	0.00		
						Tax TTL	30.24	27.49	(2.75)	2.75	
2025001503	660145	PP	2025	AMH 2014-3 BORROWER LP	10/31/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	27.34	27.34	0.00		PENALTY CHANGE
						LL	2.73	0.00	(2.73)		
						INT	0.00	0.00	0.00		
						Tax TTL	30.07	27.34	(2.73)	2.73	
2025001474	660146	PP	2025	AMH 2014-3 BORROWER LP	10/31/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	9.89	9.89	0.00		PENALTY CHANGE
						LL	0.99	0.00	(0.99)		
						INT	0.00	0.00	0.00		
						Tax TTL	10.88	9.89	(0.99)	0.99	
2025001475	660147	PP	2025	AMH 2014-3 BORROWER LP	10/31/2025	Value	16,426	16,426	0		LATE LIST
Public Notes:						Tax	79.47	79.47	0.00		PENALTY CHANGE
						LL	7.95	0.00	(7.95)		
						INT	0.00	0.00	0.00		
						Tax TTL	87.42	79.47	(7.95)	7.95	
2025001476	660148	PP	2025	AMH 2014-3 BORROWER LP	10/31/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	9.86	9.86	0.00		PENALTY CHANGE
						LL	0.99	0.00	(0.99)		
						INT	0.00	0.00	0.00		
						Tax TTL	10.85	9.86	(0.99)	0.99	
2025001477	660149	PP	2025	AMH 2014-3 BORROWER LP	10/31/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	9.54	9.54	0.00		PENALTY CHANGE
						LL	0.95	0.00	(0.95)		
						INT	0.00	0.00	0.00		
						Tax TTL	10.49	9.54	(0.95)	0.95	

Correction Listing Report

Union County

Page 111 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001478	660150	PP	2025	AMH 2014-3 BORROWER LP	10/31/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	26.15	26.15	0.00		PENALTY CHANGE
						LL	2.62	0.00	(2.62)		
						INT	0.00	0.00	0.00		
						Tax TTL	28.77	26.15	(2.62)	2.62	
2025001479	660161	PP	2025	AMH 2015-1 BORROWER LP	10/31/2025	Value	16,426	16,426	0		LATE LIST
Public Notes:						Tax	143.60	143.60	0.00		PENALTY CHANGE
						LL	14.36	0.00	(14.36)		
						INT	0.00	0.00	0.00		
						Tax TTL	157.96	143.60	(14.36)	7.13	
2025001473	660162	PP	2025	AMH 2015-1 BORROWER LP	10/31/2025	Value	8,213	8,213	0		LATE LIST
Public Notes:						Tax	63.26	63.26	0.00		PENALTY CHANGE
						LL	6.33	0.00	(6.33)		
						INT	0.00	0.00	0.00		
						Tax TTL	69.59	63.26	(6.33)	6.33	
2025001480	660163	PP	2025	AMH 2015-1 BORROWER LP	10/31/2025	Value	22,585	22,585	0		LATE LIST
Public Notes:						Tax	147.66	147.66	0.00		PENALTY CHANGE
						LL	14.77	0.00	(14.77)		
						INT	0.00	0.00	0.00		
						Tax TTL	162.43	147.66	(14.77)	10.93	
2025001481	660164	PP	2025	AMH 2015-1 BORROWER LP	10/31/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	26.71	26.71	0.00		PENALTY CHANGE
						LL	2.67	0.00	(2.67)		
						INT	0.00	0.00	0.00		
						Tax TTL	29.38	26.71	(2.67)	1.97	
2025001482	660165	PP	2025	AMH 2015-1 BORROWER LP	10/31/2025	Value	20,532	20,532	0		LATE LIST
Public Notes:						Tax	132.82	132.82	0.00		PENALTY CHANGE
						LL	13.28	0.00	(13.28)		
						INT	0.00	0.00	0.00		
						Tax TTL	146.10	132.82	(13.28)	9.79	

Correction Listing Report

Union County

Page 112 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001483	660166	PP	2025	AMH 2015-1 BORROWER LP	10/31/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	13.03	13.03	0.00		PENALTY CHANGE
						LL	1.30	0.00	(1.30)		
						INT	0.00	0.00	0.00		
						Tax TTL	14.33	13.03	(1.30)	0.95	
2025001468	660167	PP	2025	AMH 2015-1 BORROWER LP	10/30/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	27.49	27.49	0.00		PENALTY CHANGE
						LL	2.75	0.00	(2.75)		
						INT	0.00	0.00	0.00		
						Tax TTL	30.24	27.49	(2.75)	2.75	
2025001257	660168	PP	2025	AMH 2015-1 BORROWER LP	10/28/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	27.34	27.34	0.00		PENALTY CHANGE
						LL	2.73	0.00	(2.73)		
						INT	0.00	0.00	0.00		
						Tax TTL	30.07	27.34	(2.73)	2.73	
2025001258	660169	PP	2025	AMH 2015-1 BORROWER LP	10/28/2025	Value	22,585	22,585	0		LATE LIST
Public Notes:						Tax	109.27	109.27	0.00		PENALTY CHANGE
						LL	10.93	0.00	(10.93)		
						INT	0.00	0.00	0.00		
						Tax TTL	120.20	109.27	(10.93)	10.93	
2025001471	660170	PP	2025	AMH 2015-1 BORROWER LP	10/31/2025	Value	6,160	6,160	0		LATE LIST
Public Notes:						Tax	29.59	29.59	0.00		PENALTY CHANGE
						LL	2.96	0.00	(2.96)		
						INT	0.00	0.00	0.00		
						Tax TTL	32.55	29.59	(2.96)	2.96	
2025001470	660171	PP	2025	AMH 2015-1 BORROWER LP	10/31/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	19.08	19.08	0.00		PENALTY CHANGE
						LL	1.91	0.00	(1.91)		
						INT	0.00	0.00	0.00		
						Tax TTL	20.99	19.08	(1.91)	1.91	

Correction Listing Report

Union County

Page 113 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001469	660172	PP	2025	AMH 2015-1 BORROWER LP	10/31/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	19.58	19.58	0.00		PENALTY CHANGE
						LL	1.96	0.00	(1.96)		
						INT	0.00	0.00	0.00		
						Tax TTL	21.54	19.58	(1.96)	1.96	
2025001464	660173	PP	2025	AMH 2015-1 BORROWER LP	10/28/2025	Value	6,160	6,160	0		LATE LIST
Public Notes:						Tax	39.23	39.23	0.00		PENALTY CHANGE
						LL	3.92	0.00	(3.92)		
						INT	0.00	0.00	0.00		
						Tax TTL	43.15	39.23	(3.92)	3.92	
2025001344	660174	PP	2025	AMH 2015-1 BORROWER LP	10/28/2025	Value	2,053	2,053	0		LATE LIST
Public Notes:						Tax	10.43	10.43	0.00		PENALTY CHANGE
						LL	1.04	0.00	(1.04)		
						INT	0.00	0.00	0.00		
						Tax TTL	11.47	10.43	(1.04)	1.00	
2025001345	660175	PP	2025	AMH NC PROPERTIES LP	10/28/2025	Value	51,330	51,330	0		LATE LIST
Public Notes:						Tax	448.73	448.73	0.00		PENALTY CHANGE
						LL	44.87	0.00	(44.87)		
						INT	0.00	0.00	0.00		
						Tax TTL	493.60	448.73	(44.87)	22.29	
2025001472	660176	PP	2025	AMH NC PROPERTIES LP	10/31/2025	Value	69,809	69,809	0		LATE LIST
Public Notes:						Tax	537.67	537.67	0.00		PENALTY CHANGE
						LL	53.77	0.00	(53.77)		
						INT	0.00	0.00	0.00		
						Tax TTL	591.44	537.67	(53.77)	53.77	
2025001485	660177	PP	2025	AMH NC PROPERTIES LP	10/31/2025	Value	108,820	108,820	0		LATE LIST
Public Notes:						Tax	711.47	711.47	0.00		PENALTY CHANGE
						LL	71.15	0.00	(71.15)		
						INT	0.00	0.00	0.00		
						Tax TTL	782.62	711.47	(71.15)	52.65	

Correction Listing Report

Union County

Page 114 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001486	660178	PP	2025	AMH NC PROPERTIES LP	10/31/2025	Value	43,117	43,117	0		LATE LIST
Public Notes:						Tax	280.43	280.43	0.00		PENALTY CHANGE
						LL	28.04	0.00	(28.04)		
						INT	0.00	0.00	0.00		
						Tax TTL	308.47	280.43	(28.04)	20.71	
2025001487	660179	PP	2025	AMH NC PROPERTIES LP	10/31/2025	Value	102,660	102,660	0		LATE LIST
Public Notes:						Tax	664.11	664.11	0.00		PENALTY CHANGE
						LL	66.41	0.00	(66.41)		
						INT	0.00	0.00	0.00		
						Tax TTL	730.52	664.11	(66.41)	48.96	
2025001488	660180	PP	2025	AMH NC PROPERTIES LP	10/31/2025	Value	39,011	39,011	0		LATE LIST
Public Notes:						Tax	247.56	247.56	0.00		PENALTY CHANGE
						LL	24.76	0.00	(24.76)		
						INT	0.00	0.00	0.00		
						Tax TTL	272.32	247.56	(24.76)	18.13	
2025001339	660181	PP	2025	AMH NC PROPERTIES LP	10/28/2025	Value	20,532	20,532	0		LATE LIST
Public Notes:						Tax	137.44	137.44	0.00		PENALTY CHANGE
						LL	13.74	0.00	(13.74)		
						INT	0.00	0.00	0.00		
						Tax TTL	151.18	137.44	(13.74)	13.74	
2025001340	660182	PP	2025	AMH NC PROPERTIES LP	10/28/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	27.34	27.34	0.00		PENALTY CHANGE
						LL	2.73	0.00	(2.73)		
						INT	0.00	0.00	0.00		
						Tax TTL	30.07	27.34	(2.73)	2.73	
2025001341	660183	PP	2025	AMH NC PROPERTIES LP	10/28/2025	Value	10,266	10,266	0		LATE LIST
Public Notes:						Tax	49.44	49.44	0.00		PENALTY CHANGE
						LL	4.94	0.00	(4.94)		
						INT	0.00	0.00	0.00		
						Tax TTL	54.38	49.44	(4.94)	4.94	

Correction Listing Report

Union County

Page 115 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025001342	660184	PP	2025	AMH NC PROPERTIES LP	10/28/2025	Value	73,915	73,915	0		LATE LIST
Public Notes:						Tax	357.60	357.60	0.00		PENALTY CHANGE
						LL	35.76	0.00	(35.76)		
						INT	0.00	0.00	0.00		
						Tax TTL	393.36	357.60	(35.76)	35.76	
2025001343	660185	PP	2025	AMH NC PROPERTIES LP	10/21/2025	Value	8,213	8,213	0		LATE LIST
Public Notes:						Tax	39.46	39.46	0.00		PENALTY CHANGE
						LL	3.95	0.00	(3.95)		
						INT	0.00	0.00	0.00		
						Tax TTL	43.41	39.46	(3.95)	3.95	
2025001255	660186	PP	2025	AMH NC PROPERTIES LP	10/28/2025	Value	12,319	12,319	0		LATE LIST
Public Notes:						Tax	57.23	57.23	0.00		PENALTY CHANGE
						LL	5.72	0.00	(5.72)		
						INT	0.00	0.00	0.00		
						Tax TTL	62.95	57.23	(5.72)	5.72	
2025001256	660187	PP	2025	AMH NC PROPERTIES LP	10/20/2025	Value	4,106	4,106	0		LATE LIST
Public Notes:						Tax	19.58	19.58	0.00		PENALTY CHANGE
						LL	1.96	0.00	(1.96)		
						INT	0.00	0.00	0.00		
						Tax TTL	21.54	19.58	(1.96)	1.96	
2025001484	660188	PP	2025	AMH NC PROPERTIES LP	10/31/2025	Value	41,064	41,064	0		LATE LIST
Public Notes:						Tax	261.54	261.54	0.00		PENALTY CHANGE
						LL	26.15	0.00	(26.15)		
						INT	0.00	0.00	0.00		
						Tax TTL	287.69	261.54	(26.15)	26.15	
2025000964	665127	PP	2024	COULTER, ANDREW CHARLES	10/2/2025	Value	64,783	0	(64,783)		TAXPAYER MOVED
Public Notes:						Tax	416.68	0.00	(416.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	416.68	0.00	(416.68)	0.00	

Union County

Page 116 of 116

2025/11/03 09:47:26 AM

Date Posted between 10/1/2025 and 10/31/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000965	665528	PP	2024	COULTER, ANDREW CHARLES	10/2/2025	Value	57,060	0	(57,060)		TAXPAYER MOVED
Public Notes:						Tax	367.01	0.00	(367.01)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	367.01	0.00	(367.01)	0.00	
2025000971	666752	PP	2024	PATHIPATI, SUBRAMANYAM NAI	10/2/2025	Value	48,407	0	(48,407)		TAXPAYER MOVED
Public Notes:						Tax	527.88	0.00	(527.88)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	527.88	0.00	(527.88)	0.00	
Totals for Type Value Change - Release :						Value	386,823,720	326,781,298	(60,042,422)		
						Tax	2,664,673.43	2,257,197.61	(407,475.82)		
						LL	2,913.14	672.28	(2,240.86)		
						INT	0.00	0.00	0.00		
						Tax TTL	2,667,586.57	2,257,869.89	(409,716.68)	21,093.01	
Grand Totals :	Year	Refund Amount				Value	470,088,688	434,821,200	(35,267,488)		
						Tax	3,358,213.56	3,149,522.86	(208,690.70)		
						LL	30,222.00	78,039.85	47,817.85		
						INT	0.00	3,364.67	3,364.67		
						Tax TTL	3,388,435.56	3,230,927.38	(157,508.18)	21,093.01	



Union County, NC

Staff Report

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

File #: 25-703

Agenda Date: 11/17/2025

TITLE:

Contract - Phone System Upgrade

INFORMATION CONTACT:

Jon Amelio, Information Technology, Director, 704-283-3533

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Procurement Department partnered with Information Technology to issue Request for Proposals 2025-022 Union County Phone System Upgrade. On December 19, 2024, eighteen proposals were received and reviewed by an evaluation team in accordance with applicable evaluation criteria for this project. The top ranked six 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, Ring Central, Inc, to provide Cloud Phone services. This contract has an initial term of five years with three two-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 \$271,958.40. Since this contract contains a five-year term with three two-year renewal options, a total of \$2,991,542.40 is estimated to be spent. Funding is available in the adopted FY2026 budget with future expenditures subject to annual BOCC budget appropriation.



INITIAL ORDER FORM

This Initial Order Form is a binding agreement between RingCentral, Inc. (“**RingCentral**”) and **Union County** (“**Customer**” or “**You**”) (together the “**Parties**”), for the purchase of the Services, licenses, and products listed herein. This Initial Order Form is subject to and incorporates the terms and conditions of: (i) the separate written agreement, executed by the Parties governing the purchase of the Services described in this Order Form, or (ii) the RingCentral Online Terms of Service available at <https://www.ringcentral.com/legal/eulatos.html>, if there is no written agreement in place (hereinafter (i) and (ii) referred to as the “**Agreement**”). Capitalized terms not defined herein shall have the same meanings as set forth in the applicable Agreement between the Parties. Unless agreed by both Parties in writing, any terms or conditions set forth in a Customer-issued purchase order or ordering document shall not apply.

Please note that RingCentral MVP is now RingEX. All references to “RingCentral MVP”, whether in terms of service, advertising or product descriptions, mean “RingEX”.

Customer

Union County

500 N. Main St., Suite 814
Monroe, NC 28112
United States

Jon Amelio

jon.amelio@unioncountync.gov

Service Provider

RingCentral, Inc.

20 Davis Drive
Belmont, CA 94002
United States

Service Commitment Period

Start Date: Effective as of the last date of signature below

Initial Term: 60 Months

Renewal Term: Three renewal terms of 24 Months at Customer’s discretion, pending annual budget approval.

Payment Schedule: Monthly

RingEX Services

Recurring Services			
Summary of Service	Qty	Rate	Subtotal
DigitalLine Unlimited Advanced	1,500	\$11.25	\$16,875.00
DigitalLine Unlimited Advanced		\$7.25	
Compliance and Administrative Cost Recovery Fee		\$3.00	
e911 Service Fee		\$1.00	
Yealink CP925 - Touch-Sensitive IP Conference Phone - DaaS	20	\$4.34	\$86.80
Yealink T46U Ultra-elegant Gigabit IP Phone with 1 Expansion Module EXP43 - Rental	5	\$4.00	\$20.00
Yealink T46U Ultra-elegant Gigabit IP Phone - DaaS	125	\$2.00	\$250.00
Yealink T33G Gigabit Business Phone - DaaS	600	\$1.00	\$600.00
Additional Local Number	300	\$0.10	\$30.00
10DLC TCR SMS Registration - UCaaS Low Volume Campaign	1	\$1.50	\$1.50
Monthly Recurring Services*			\$17,863.30

One-Time Items			
Summary of Item(s)	Qty	Rate	Subtotal
10DLC TCR SMS Registration - Standard Campaign	1	\$15.00	\$15.00
10DLC TCR SMS Registration - Standard Brand	1	\$4.00	\$4.00
One-Time Total			\$19.00

RingCX Services

Recurring Services			
Summary of Service	Qty	Rate	Subtotal
RingCX, named agent seat	80	\$60.00	\$4,800.00
Call recording storage - 30 days, per seat	80	\$0.00	\$0.00
Monthly Recurring Services*			\$4,800.00

Total Initial Amount	\$22,682.30
----------------------	-------------

*Amounts are exclusive of applicable Taxes, Fees, and Shipping Charges.

Overage Rates*	
RingCX Services	Rate
RingCX, named agent seat on demand	\$95.00
Inbound calls to North America toll-free numbers, per 10 min	\$0.14
Outbound calls via automated dialer to North America numbers, per 10 min	\$0.16
IVR calls processing, overage per 10 minutes	\$0.20
Call recording storage - 30 days, overage per seat	\$0.00
Disconnect Scrub, per 10 scrubs	\$0.08
Automated speech recognition, per 10 minutes	\$0.30
RingCX Analytics - Historical Data Retention 2Y	\$30.00
RingCX Analytics - Historical Data Retention 3Y	\$45.00
RingCX Analytics - Historical Data Retention 4Y	\$60.00
RingCX Analytics - Historical Data Retention 5Y	\$75.00
RingCX Analytics - Historical Data Retention 6Y	\$90.00
RingCX Analytics - Historical Data Retention 7Y	\$105.00
RingCX Analytics - Historical Data Retention 8Y	\$120.00
RingCX Screen Recording Active Storage per 1 GB	\$0.50

NOTE: Customer acknowledges and agrees that if third-party products such as WhatsApp are used, additional fees may be incurred and invoiced by RingCentral on your next billing cycle after such usage occurred.

Cost Center Billing

For customers with cost center billing, it is the Customer's responsibility to provide cost center allocation information to RingCentral at least 10 days prior to the issuance of the invoice. After the information is received, it will be reflected on future invoices, but will not be adjusted retroactively on past invoices. If purchasing additional services through the administrative portal, it is the Customer's responsibility to assign cost centers at the time of purchase; otherwise, those services will not be allocated by cost center on the next invoice. Please note that cost center allocation is not available for certain items, such as minute bundles and credit memos. For additional questions, please contact the RingCentral invoice billing team at billingsupport@ringcentral.com.

Free Services Amount

You will receive the amount(s) indicated below (the "**Free Service Amount**"), which will be applied against charges for the recurring Services set forth in this Order Form and any applicable taxes and fees associated with those Services invoiced by RingCentral. The Free Service Amount is non-transferable and non-refundable and will expire upon termination of this Order Form. You will be responsible for paying for any additional services and products ordered, and any applicable associated taxes and fees.

RingEX Free Services Amount: 93,441.50 US Dollars

RingCX Free Services Amount: 24,000.00 US Dollars

Customer Reference. Customer may promote their use of RingCentral services and agrees that RingCentral may identify customer as a user of the services. All press releases or quotes regarding Customer's use of service will be pre-approved by Customer, which consent will not be unreasonably withheld.

Add-on Services. Customer is responsible for reviewing additional terms and conditions that may apply to RingCentral add-on services (where available) and certain Advanced Support Services listed on this order form, and which are available at <https://www.ringcentral.com/legal/add-on-services.html>.

Special Terms & Notes

RingCX

RingCX Analytics. RingCX Analytics includes real-time and historical reporting as custom and pre-built visual dashboards with pre-defined reports. RingCentral will retain historical reporting data according to your selected historical data retention period after which data will be purged on a rolling basis. Retention periods apply to all users of the RingCX product and will be billed on a per seat per month basis.

RingCentral will retain one year's worth of historical reporting data after which any data older than one year, will be purged. Access to longer periods of analytics data may be purchased according to the table above. The applicable retention period selected for the Services above is 1 year.

Customer must contact RingCentral support to modify historical reporting data retention periods, if available.

IN WITNESS WHEREOF, the Parties have executed this Initial Order Form above through their duly authorized representatives.

Customer
Union County

RingCentral
RingCentral, Inc.

By: _____
Name: Brian W. Matthews
Title: County Manager
Date: _____

By: _____
Name: Michael Fiocca
Title: Regional Vice President, Public Sector
Date: _____

This Instrument Has Been Preaudited In The
Manner Required By The Local Government
Budget And Fiscal Control Act

Deputy Finance Officer

Approved as to Legal Form: CJB



MASTER SERVICES AGREEMENT

This Master Services Agreement is effective as of the date of last signature (“**Effective Date**”) and made between:

Union County (“Customer”)

Address:

500 N. Main St., Suite 709
Monroe, NC 28112

RingCentral, Inc. (“RingCentral”)

Address:

20 Davis Drive
Belmont, CA 94002

By: _____
Name: Brian W. Matthews
Title: County Manager
Date: _____

By: _____
Name: Michael Fiocca
Title: Regional Vice President, Public Sector
Date: _____

RingCentral and Customer are together referred to as the “Parties” and each individually as a “Party.”

1. The Master Services Agreement (“**Agreement**”) consists of the terms and conditions contained herein, and any Service Attachments applicable to Customer’s Services, and any other Attachments agreed by the Parties, are incorporated into and form a part of this Agreement.

Exhibit A – Definitions

Attachment A – RingEX Services

Attachment B – RingCX Services

Attachment C – Service Level Agreement for RingEX Services

Attachment D – Service Level Agreement for RingCX Services

Attachment E – Security Addendum

Attachment F – Additional Insurance

Attachment G – Business Associate Agreement

THE PARTIES AGREE AS FOLLOWS:

2. Ordering and Term

- A. Ordering Services.** Customer may order the Services set forth in the relevant Attachments, attached hereto, by executing an Order Form in the format provided by RingCentral. Customer must submit the Order Form to RingCentral either in writing or electronically via the Administrative Portal. The Order Form will identify the Services requested by Customer together with: (i) the price for each Service; (ii) scheduled Start Date; (iii) and products rented, licensed, or sold to Customer, if any. An Order Form will become binding when it is executed by the Customer and accepted by RingCentral. RingCentral may accept an Order Form by commencing performance of the requested Services. The Services and invoicing for those Services will begin on the Start Date, as identified in the applicable Order Form or on the day Services are ordered via the Administrative Portal. Customer may purchase additional Services, software, and equipment via the Administrative Portal or by executing additional Order Forms.
- B. Equipment.** Subject to availability based on brand and Customer location, Customer may purchase or rent equipment from RingCentral for use with the Services. The terms and conditions that govern any such transaction can be found at:

- i. Purchase: <http://www.ringcentral.com/legal/ringcentral-hardware-terms-conditions.html>;
- ii. Rental: <http://www.ringcentral.com/legal/lease-rental.html>, and
- iii. Device as a Services: <https://www.ringcentral.com/legal/daas-agreement.html>.

C. Term of this Agreement. The Term of this Agreement will commence on the Effective Date and continue until the last Order Form is terminated or expires, unless terminated earlier in accordance with its terms.

D. Services Term. The Services Term will begin on the Start Date of the initial Order Form and continue for the initial term set forth in the initial Order Form (“**Initial Term**”). The Term of any recurring Services added to your Account after the initial Order Form is executed will start on the Start Date in the applicable Order Form, will run coterminously with the then-current Term of any preexisting Services unless otherwise extended in the applicable Order Form, and will be invoiced on the same billing cycles as the preexisting Services.

3. Invoicing and Payment

A. Prices and Charges. All prices are identified in US dollars on the Administrative Portal or in the applicable Order Form unless otherwise agreed by the Parties. Additional charges may result if Customer activates additional features, exceeds usage thresholds, or purchases additional Services or equipment. Customer will be liable for all charges resulting from use of the Services on its Account. Unless otherwise agreed between the Parties, recurring charges (such as charges for Digital Lines, product licenses, minute bundles, and equipment rental fees) for the Services begin on the Start Date identified in the Administrative Portal or in the applicable Order Form and will remain in effect for the Initial Term (as described in an Order Form) or, if applicable, the then-current Renewal Term. RingCentral will provide notice of any proposed increase in such charges no later than sixty (60) days before the end of the Initial Term or then-current Renewal Term, and any such increase will be effective on the first day of the next Renewal Term. Administrative Fees that RingCentral is entitled to pass on to its customers as a surcharge pursuant to applicable Law may be increased on thirty (30) days’ written notice. Outbound calling rates will be applied based on the rate in effect at the time of use. Customer may locate the currently effective rates in the Administrative Portal.

B. Invoicing and Payment. Invoices will be issued in accordance with the payment terms set forth in the Order Form. If Customer chooses to pay by credit or debit card, by providing a valid credit or debit card, Customer is expressly authorizing all Services and equipment charges and fees to be charged to such payment card, including recurring payments billed on a monthly or annual basis. In addition, Customer’s provided credit card shall be used for any in-month purchases of additional services and products, or where Customer has exceeded usage or threshold limits, any overage charges. Unless otherwise stated in the applicable Order Form, recurring charges are invoiced in advance in the frequency set forth in the Order Form, and usage-based and onetime charges are billed monthly in arrears. Customer shall make payment in full, without deduction or set-off, within thirty (30) days of the invoice date. Any payment not made when due may be subject to a late payment fee equivalent to the lesser of (i) one and a half percent (1.5%) per month or (ii) if applicable, the highest rate allowed by Law. In no event may payment be subject to delays due to Customer internal purchase order process.

C. Taxes. All rates, fees, and charges are exclusive of applicable Taxes, for which Customer is solely responsible. Taxes may vary based on jurisdiction and the Services provided. If any withholding tax is levied on the payments, then Customer must increase the sums paid to RingCentral so that the amount received by RingCentral after the withholding tax is deducted is the full amount RingCentral would have received if no withholding or deduction had been made. If Customer is a tax-exempt entity, tax exemption will take effect upon provision to and validation by RingCentral of certificate of tax exemption.

D. Billing Disputes. If a Customer reasonably and in good faith disputes any portion of RingCentral’s invoice, it must provide written notice to RingCentral within sixty (60) days of the invoice date, identifying the reason for the dispute and the amount being disputed. Customer’s dispute as to any portion of the invoice will not excuse Customer’s obligation to timely pay the undisputed portion of the invoice. Upon resolution, Customer must pay any validly invoiced unpaid amounts within thirty (30) days. Any amounts that are found to be in error resulting in an overpayment by the Customer will be applied as a billing credit against future invoices. Customer will be reimbursed any outstanding billing credits at the expiration or termination of this Agreement.

4. Provision of the Service

A. General Terms. RingCentral will provide the Services as described in the relevant Service Attachment. RingCentral may enhance, replace, and/or change the features of the Services, but it will not materially reduce the core features, functions, or security of the Services during the Term without Customer’s consent.

B. Customer Care

- i. Customer must provide Helpdesk Support to Customer’s End Users. RingCentral may require Customer’s Helpdesk Support personnel to complete a designated series of training courses on RingCentral’s Services. Such training will be provided to Customer online in English at no cost.
- ii. RingCentral will make remote support available to Customer’s Helpdesk Support personnel and/or Account Administrators via the Customer Care call center, which will be available 24/7, to attempt to resolve technical issues with, and answer questions regarding the use of the Services. Unless otherwise agreed by the parties, Customer Care support will be provided in English, and onsite and implementation services are not included in the Customer Care support.
- iii. Customer may open a case with Customer Care following the process in place at the time. Any individual contacting Customer Care on behalf of Customer must be authorized to do so on behalf of the Account and will be required to follow

applicable authentication protocols.

- C. **Professional Services.** RingCentral offers a broad portfolio of professional services that includes onsite and remote implementation services; extended enterprise services including premium technical support; and consulting. Any such services are governed by this Agreement, the Professional Services terms, and any applicable Statement of Work (SOW), which may be attached hereto.
- D. **Managed Services.** Customer may purchase Managed Services from RingCentral for use with the Services. The terms and conditions that govern the Managed Services can be found at: <https://www.ringcentral.com/legal/managed-services-attachment.html>.
- E. **Subcontracting.** RingCentral may provide any of the Services hereunder through any of its Affiliates or subcontractors, provided that RingCentral will bear the same degree of responsibility for acts and omissions for those subcontractors acting on RingCentral's behalf in the performance of its obligations under this Agreement as it would bear if such acts and omissions were performed by RingCentral directly.

5. Use of the Service

- A. **Service Requirements.** The Services are dependent upon Customer's maintenance of sufficient Internet access, networks, and power as set forth in RingCentral's Technical Sufficiency Criteria, available at <https://www.ringcentral.com/legal/policies/technical-sufficiency-criteria.html>. RingCentral will not be responsible for any deficiencies in the provision of the Services if Customer's network does not meet RingCentral's Technical Sufficiency Criteria.
- B. **Use Policies.** Customer and its End Users may use the Services only in compliance with this Agreement, applicable Law, and the Use Policies referenced below, which are incorporated into and form part of this Agreement. Customer must ensure that its End Users comply with the Use Policies. Any breach of this Section (Use Policies) will be deemed a material breach of this Agreement. RingCentral may update the Use Policies from time to time and will provide notice of material updates to Customer at the email address on file with the Account. All updates will become effective thirty (30) days after such notice to Customer or upon posting for non-material changes. Customer may object to a modification that negatively impacts its use of the Service by sending written notice ("Objection Notice") to RingCentral within thirty (30) days from the date of the notice of modification. If the Parties cannot reach agreement, then either Party may terminate the affected Services without penalty with thirty (30) days written notice to the other Party.
 - i. **Acceptable Use Policy.** The Services must be used in accordance with RingCentral's Acceptable Use Policy, available at <https://www.ringcentral.com/legal/acceptable-use-policy.html>. Notwithstanding anything to the contrary in this Agreement, RingCentral may act immediately and without notice to suspend or limit the Services if RingCentral reasonably suspects fraudulent or illegal activity in the Customer's Account, material breach of the Acceptable Use Policy, or use of the Services that could interfere with the functioning of the RingCentral Network provided such suspension or limitation may only be to the extent reasonably necessary to protect against the applicable condition, activity, or use. RingCentral will promptly remove the suspension or limitation as soon as the condition, activity or use is resolved and mitigated in full. If Customer anticipates legitimate but unusual activity on its Account, Customer should contact Customer Care in advance to avoid any Service disruption.
 - ii. **Emergency Services.** RingCentral's policy governing the provision of emergency services accessed via the Services is available at <https://www.ringcentral.com/legal/emergency-services.html>.
 - iii. **Numbering Policy.** The provision, use, and publication of numbers used in conjunction with the Services are governed by RingCentral's Numbering Policies, available at <https://www.ringcentral.com/legal/policies/numbering-policy.html>.

6. Termination

- A. **Termination for Cause.** Either Party may terminate this Agreement and any Services purchased hereunder in whole or part by giving written notice to the other Party: i) if the other Party breaches any material term of this Agreement and fails to cure such breach within thirty (30) days after receipt of such notice; ii) at the written recommendation of a government or regulatory agency following a change in either applicable Law or the Services; or iii) upon the commencement by or against the other Party of insolvency, receivership or bankruptcy proceedings or any other proceedings or an assignment for the benefit of creditors.
- B. **Effect of Termination.** If Customer terminates the Services, a portion of the Services, or this Agreement in its entirety due to RingCentral's material breach under Section 6(A) (Termination for Cause), Customer will not be liable for any fees or charges for terminated Services for any period subsequent to the effective date of such termination (except those arising from continued usage before the Services are disconnected), and RingCentral will provide Customer a pro-rata refund of any prepaid and unused fees or charges paid by Customer for terminated Services. If this Agreement or any Services are terminated for any reason other than as a result of a material breach by RingCentral or as otherwise permitted pursuant to Section 6(A) or as set forth in Section 14(I) (Regulatory and Legal Changes) the Customer must, to the extent permitted by applicable Law and without limiting any other right or remedy of RingCentral, pay within thirty (30) days of such termination all amounts that have accrued prior to such termination, as well as all sums remaining unpaid for the Services for the remainder of the then-current Term plus related Taxes and fees.
- C. **Termination due to insufficient appropriations.** Customer may terminate this Agreement in the event (1) insufficient appropriations are made by the Union County Board of Commissioners and (2) public funds are unavailable for services that are the substantial equivalent as those provided by RingCentral under the Agreement

7. Intellectual Property

A. Limited License

- i. Subject to, and conditional upon Customer's compliance with, the terms of this Agreement, RingCentral grants to Customer and its End User, a limited, personal, revocable, non-exclusive, non-transferable (other than as permitted under this Agreement), non-sublicensable license to use any software provided or made available by RingCentral to the Customer as part of the Services ("**Software**") to the extent reasonably required to use the Services as permitted by this Agreement, only for the duration that Customer is entitled to use the Services and subject to the Customer being current on its payment obligations.
- ii. Customer will not, and will not allow its End Users, to: (a) sublicense, resell, distribute or assign its right under the license granted under this Agreement to any other person or entity; (b) modify, adapt or create derivative works of the Software or any associated documentation; (c) reverse engineer, decompile, decrypt, disassemble or otherwise attempt to derive the source code for the Software; (d) use the Software for infringement analysis, benchmarking, or for any purpose other than as necessary to use the Services Customer is authorized to use; (e) create any competing Software or Services; or (f) remove any copyright or other proprietary or confidential notices on any Software or Services.

B. IP Rights

- i. **RingCentral's Rights.** Except as expressly provided in this Agreement, the limited license granted to Customer under Section 7(A) (Limited License) does not convey any ownership or other rights or licenses, express or implied, in the Services (including the Software), any related materials, or in any Intellectual Property and no IP Rights or other rights or licenses are granted, transferred, or assigned to Customer, any End User, or any other party by implication, estoppel, or otherwise. All rights not expressly granted herein are reserved and retained by RingCentral and its licensors. The Software and Services may comprise or incorporate services, software, technology, or products developed or provided by third parties, including open-source software or code. Customer acknowledges that misuse of RingCentral Services may violate third-party IP rights.
- ii. **Customer Rights.** As between RingCentral and Customer, Customer retains title to all IP Rights that are owned by the Customer or its suppliers. To the extent reasonably required or desirable for the provision of the Services, Customer grants to RingCentral a limited, personal, non-exclusive, royalty-free, license to use Customer's IP Rights in the same. Customer must provide (and is solely responsible for providing) all required notices and obtaining all licenses, consents, authorizations, or other approvals related to the use, reproduction, transmission, or receipt of any Customer Content that includes personal or Confidential Information or incorporates any third-party IP rights.

- C. **Use of Marks.** Neither Party may use or display the other Party's trademarks, service mark or logos in any manner without such Party's prior written consent.

8. Confidentiality

- A. **Restrictions on Use or Disclosures by Either Party.** During the Term of this Agreement and for at least one (1) year thereafter, the Receiving Party shall hold the Disclosing Party's Confidential Information in confidence, shall use such Confidential Information only for the purpose of fulfilling its obligations under this Agreement, and shall use at least as great a standard of care in protecting the Confidential Information as it uses to protect its own Confidential Information.

Each Party may disclose Confidential Information only to those of its employees, agents or subcontractors who have a need to it in order to perform or exercise such Party's rights or obligations under this Agreement and who are required to protect it against unauthorized disclosure in a manner no less protective than required under this Agreement. Each Party may disclose the other Party's Confidential Information in any legal proceeding or to a governmental entity as required by Law.

These restrictions on the use or disclosure of Confidential Information do not apply to any information which is independently developed by the Receiving Party or lawfully received free of restriction from another source having the right to so furnish such information; after it has become generally available to the public without breach of this Agreement by the Receiving Party; which at the time of disclosure was already known to the Receiving Party, without restriction as evidenced by documentation in such Party's possession; or which the Disclosing Party confirms in writing is free of such restrictions.

Upon termination of this Agreement, the Receiving Party will promptly delete, destroy or, at the Disclosing Party's request, return to the Disclosing Party, all Disclosing Party's Confidential Information in its possession, including deleting or rendering unusable all electronic files and data that contain Confidential Information, and upon request will provide the Disclosing Party with certification of compliance with this subsection.

9. Data Protection

- A. **Data Privacy.** RingCentral respects Customer's privacy and will only use the information provided by Customer to RingCentral or collected in the provision of the Services in accordance with RingCentral's Data Processing Addendum, available at <https://www.ringcentral.com/legal/dpa.html>, incorporated by reference. RingCentral may update the Data Processing Addendum from time to time and will provide notice of any material updates to the Customer as required by applicable Laws at the email address on file with the Account. Such updates will be effective thirty (30) days after such notice to Customer.
- B. **Data Security.** RingCentral will take commercially reasonable precautions, including, without limitation, technical (e.g., firewalls and data encryption), organizational, administrative, and physical measures, to help safeguard Customer's Account, Account

Data, and Customer Content against unauthorized use, disclosure, or modification. Customer must protect all End Points using commercially reasonable security measures. Customer is solely responsible to keep all user identifications and passwords secure. Customer must monitor use of the Services for possible unlawful or fraudulent use. Customer must notify RingCentral immediately if Customer becomes aware or has reason to believe that the Services are being used fraudulently or without authorization by any End User or third party. Failure to notify RingCentral may result in the suspension or termination of the Services and additional charges to Customer resulting from such use. RingCentral will not be liable for any charges resulting from unauthorized use of Customer's Account.

- C. **Software Changes.** RingCentral may from time-to-time push software updates and patches directly to Customer's device(s) for installation and Customer will not prevent RingCentral from doing so. Customer must implement promptly all fixes, updates, upgrades and replacements of software and third-party software that may be provided by RingCentral. RingCentral will not be liable for inoperability of the Services or any other Services failures due to failure of Customer to timely implement the required changes.

10. Limitations of Liability

A. Excluded Damages

IN NO EVENT WILL EITHER PARTY OR ITS AFFILIATES OR ITS OR THEIR SUPPLIERS BE LIABLE FOR (1) INDIRECT, INCIDENTAL, PUNITIVE, OR CONSEQUENTIAL DAMAGES; (2) LOSS OF USE OR LOSS OF DATA; (3) LOSS OF BUSINESS OPPORTUNITIES, REVENUES OR PROFITS; OR (4) COSTS OF PROCURING REPLACEMENT PRODUCTS OR SERVICES, IN ALL CASES WHETHER ARISING UNDER CONTRACT, WARRANTY, TORT (INCLUDING NEGLIGENCE OR STRICT LIABILITY), OR ANY OTHER THEORY OF LIABILITY, AND EVEN IF SUCH PARTY HAS BEEN INFORMED IN ADVANCE OF SUCH DAMAGES OR SUCH DAMAGES COULD HAVE BEEN REASONABLY FORESEEN.

B. Liability Caps

EXCEPT AS SET FORTH HEREIN, THE TOTAL CUMULATIVE LIABILITY OF THE PARTIES UNDER THIS AGREEMENT WILL NOT EXCEED THE AMOUNTS PAID OR PAYABLE UNDER THIS AGREEMENT DURING THE PREVIOUS EIGHTEEN (18) MONTHS. LIMITATIONS UNDER THIS SECTION (LIABILITY CAPS) WILL NOT APPLY TO:

- i. FEES OWED BY CUSTOMER
- ii. EITHER PARTY'S LIABILITY FOR INFRINGEMENT OF THE OTHER PARTY'S IP RIGHTS
- iii. EITHER PARTY'S LIABILITY RESULTING FROM GROSS NEGLIGENCE, FRAUD, OR WILLFUL OR CRIMINAL MISCONDUCT
- iv. CUSTOMER'S LIABILITY RESULTING FROM USE OF THE SERVICES IN BREACH OF THE ACCEPTABLE USE POLICY OR EMERGENCY SERVICES POLICY
- v. EITHER PARTY'S LIABILITY ARISING FROM DEATH OR PERSONAL INJURY CAUSED BY NEGLIGENCE, OR FOR ANY OTHER LIABILITY WHICH MAY NOT BE RESTRICTED, LIMITED, OR EXCLUDED PURSUANT TO APPLICABLE LAW.

11. Indemnification

A. Indemnification by RingCentral

- i. RingCentral shall indemnify and hold harmless the Customer and its Affiliates for Indemnifiable Amounts, and shall defend any third-party claims or causes of action (a "**Third Party Claim**") to the extent such Third Party Claim arises out of or alleges that:
 - a. The Services, as provided by RingCentral, infringe or misappropriate the patent, copyright, trademark, or trade secret rights of a third party.
- ii. RingCentral will have no obligations under subsection (i) above to the extent the Third Party Claim arises from: (a) use of the Services in combination with data, software, hardware, equipment, or technology not provided or authorized by RingCentral in writing unless any of the foregoing are necessary for the proper operation of the Services; (b) modifications to the Services not made by RingCentral; (c) Customer Content; (d) failure to promptly install any updates of any software or firmware, to the extent such failure materially contributes to the Third Party Claim, or accept or use any modified or replacement items provided free of charge by or on behalf of RingCentral; (e) breach of the Agreement; or (f) a Third Party Claim brought by Customer's Affiliate, successor, or assignee.
- iii. If such a Third-Party Claim is made or appears possible, Customer agrees to permit RingCentral, at RingCentral's sole discretion and expense, to (a) modify or replace the Services, or component or part thereof, to make it non-infringing or (b) obtain the right for Customer to continue to use the Services. If RingCentral determines that neither alternative is commercially reasonable, RingCentral may terminate this Agreement in its entirety or with respect to the affected Service, component or part (a "**Discontinued Component**"), effective immediately on written notice to Customer, in which case Customer will not owe any fees or charges relating to the Discontinued Component for any period subsequent to the date of such termination, and will be entitled to receive a refund of any prepaid but unused fees relating to the Discontinued Component. In the event RingCentral elects to terminate this Agreement or any Discontinued Component pursuant to this Section, RingCentral shall provide Customer with written notice as soon as reasonably practicable upon making such determination. In the event the removal of the Discontinued Component does not substantially affect Customer's use of the

Services, the refund or fee abatement pursuant to the foregoing shall be a reasonable portion of the total fees owed by Customer for the Services as a whole based on the significance of the Discontinued Component to the total value of the Services as a whole. RingCentral's obligations under this Sub-Section will be RingCentral's sole and exclusive liability and Customer's sole and exclusive remedies with respect to any actual or alleged intellectual property violations.

- B. Indemnification by Customer.** To the extent permitted by the laws and the constitution of the jurisdiction of Customer, Customer shall indemnify, and hold harmless RingCentral and its Affiliates for Indemnifiable Amounts, and shall defend any Third Party Claims arising out of or in connection with: (i) material violation of applicable Law by the Customer, its Affiliates, or their respective End Users in connection with their use of the Services; (ii) use of the Services in breach of the Use Policies; (iii) failure to promptly install any updates of any software or firmware or accept or use modified or replacement items provided free of charge by or on behalf of RingCentral; or (iv) Customer Content.
- C. Defense and Indemnification Procedures.** Any Party seeking indemnification under this Section 11 (the "**Indemnified Party**") shall provide the Party from which it seeks such indemnification (the "**Indemnifying Party**") with the following: (a) prompt written notice of the Third-Party Claim, (b) sole control over the defense and settlement of the Third-Party Claim, and (c) reasonable information, cooperation, and assistance (at the Indemnifying Party's sole expense except for the value of the time of the Indemnified Party's personnel) in connection with the defense and settlement of the Third-Party Claim. The Indemnified Party's failure to comply with the foregoing obligations will not relieve the Indemnifying Party of its defense or indemnification obligations under this Section 11 (Indemnification) except to the extent that the Indemnifying Party is materially prejudiced by such failure. The Indemnified Party will have the right to participate (but not control), at its own expense, in the defense of such Third-Party Claim, including any related settlement negotiations. No such claim may be settled by the Indemnifying Party without the Indemnified Party's express written consent (not to be unreasonably withheld, conditioned, or delayed) unless such settlement includes a full and complete release of all claims and actions against the Indemnified Party by each party bringing such Third-Party Claim, requires no admission of fault, liability, or guilt by the Indemnified Party, and requires no act by the Indemnified Party other than the payment of a sum of money fully indemnified by the Indemnifying Party.

12. Warranties

- A. RingCentral Warranty.** RingCentral will provide the Services using a commercially reasonable level of skill and care, in material compliance with all applicable Laws and otherwise subject to the terms of this Agreement. To the extent permitted by Law, RingCentral shall pass through to Customer any and all warranties RingCentral receives in connection with equipment provided to Customer by or on behalf of RingCentral.
- B. Customer Warranty.** Customer's and its End Users' use of the Services must always comply with all applicable Laws and this Agreement. Further, when Customer's subscription for Services exceeds one (1) fiscal year, Customer warrants that it shall exercise due diligence and best efforts to secure an adequate appropriation of funds on time from its legislative or similar government body to pay for the contracted Services in the follow-on fiscal year(s).
- C. Disclaimer of Warranties.** EXCEPT AS SPECIFICALLY SET FORTH IN THIS AGREEMENT AND TO THE FULLEST EXTENT PERMITTED BY LAW, THE SERVICES ARE PROVIDED "AS IS" AND "AS AVAILABLE," AND RINGCENTRAL MAKES NO OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE IMPLIED WARRANTIES OF MERCHANTABILITY, NON-INFRINGEMENT, QUIET ENJOYMENT, AND FITNESS FOR A PARTICULAR PURPOSE AND ANY WARRANTIES ARISING FROM A COURSE OF DEALING OR USAGE IN TRADE, TOGETHER WITH SIMILAR WARRANTIES, WHETHER ARISING UNDER ANY LAW OR OTHERWISE. TO THE EXTENT THAT RINGCENTRAL CANNOT DISCLAIM ANY SUCH WARRANTY AS A MATTER OF APPLICABLE LAW, THE SCOPE AND DURATION OF SUCH WILL BE LIMITED TO THE FULLEST EXTENT PERMITTED BY LAW.

13. Dispute Resolution

- A. Governing Law.** Any dispute arising out of or relating to this Agreement shall be governed and construed in accordance with the laws of NC, without regard to its choice of law rules, and the parties agree to submit to the jurisdiction of, and venue in, the courts in that state. The United Nations Convention on Contracts for the International Sale of Goods does not apply to this Agreement or Customer's use of the products or Services.
- B. Good Faith Attempt to Settle Disputes.** In the event of a dispute, each Party shall appoint a duly authorized representative who shall use all reasonable endeavors to resolve in good faith any dispute within reasonable timescales.
- C. Equitable Relief.** Any breach of either Party's IP Rights may cause that Party irreparable harm for which monetary damages will be inadequate and such Party may, in addition to other remedies available at Law or in equity, obtain injunctive relief without the necessity of posting a bond or other security, proof of damages, or similar requirement, in addition to any other relief to which such Party may be entitled under applicable Law.
- D. Limitations.** [Omitted]

14. Miscellaneous

- A. Relationship of the Parties.** RingCentral and Customer are independent contractors, and this Agreement will not establish any relationship of partnership, joint venture, employment, franchise or agency between RingCentral and Customer.
- B. Assignment.** Neither Party may assign its rights or obligations under this Agreement or any Order Form without the prior written consent of the other Party, not to be unreasonably withheld or delayed. However, RingCentral may assign the Agreement or any portion thereof and any or all of its rights and obligations thereunder without consent (a) to an Affiliate; (b) as part of, or otherwise in connection with, the transfer or disposition of equity securities representing more than fifty percent (50%) of its voting control; (c) to the successor or surviving entity in connection with a merger, acquisition, or consolidation; or (d) as part of, or otherwise in connection with, the sale or other transfer of one or more of the service(s) under the Agreement or greater than 50% of the principal assets used in connection with the provision such service(s). This Agreement will bind and inure to the benefit of the Parties, and their permitted assigns and successors.
- C. Notices.** Except where otherwise expressly stated in the Agreement, all notices or other communications must be in English and are deemed to have been fully given when made in writing and delivered in person, upon delivered email, confirmed facsimile, or five days after deposit with an reputable overnight courier service, and addressed as follows: To RingCentral at RingCentral, Inc., Legal Dept., 20 Davis Drive, Belmont, CA 94002 USA, with a copy to legal@ringcentral.com, and to Customer at either the physical address or email address associated with the Customer Account.

Customer acknowledges and agrees that all electronic notices have the full force and effect of paper notices. The addresses to which notices may be given by either Party may be changed (a) by RingCentral upon written notice given to Customer pursuant to this Section or (b) by Customer in the Administrative Portal.

- D. Force Majeure.** Excluding either Party's payment obligations under the Agreement, neither Party will be responsible or liable for any failure to perform or delay in performing to the extent resulting from any event or circumstance that is beyond that Party's reasonable control, including without limitation any act of God; national emergency; third-party telecommunications networks; riot; war; terrorism; governmental act or direction; change in Laws; fiber, cable, or wire cut; power outage or reduction; rebellion; revolution; insurrection; earthquake; storm; hurricane; flood, fire, or other natural disaster; strike or labor disturbance; or other cause, whether similar or dissimilar to the foregoing, not resulting from the actions or inactions of such Party.
- E. Third-Party Beneficiaries.** RingCentral and Customer agree that there will be no third-party beneficiaries to this Agreement.
- F. Headings, Interpretation.** The headings, section titles, and captions used in the Agreement are for convenience of reference only and will have no legal effect. All defined terms include related grammatical forms, and, whenever the context may require, the singular form of nouns and pronouns include the plural, and vice versa. The Parties agree that this Agreement will be deemed to have been jointly and equally drafted by them, and that the provisions of this Agreement therefore should not be construed against a Party or Parties on the grounds that the Party or Parties drafted or was more responsible for drafting the provision(s).
- G. Anti-Bribery.** Each Party represents that in the execution of this Agreement and in the performance of its obligations under this Agreement it has complied and will comply with all applicable anti-bribery Laws and regulations, including, without limitation, the U.S. Foreign Corrupt Practices Act, the UK Bribery Act, and similar applicable Laws.
- H. Export Control.** Any services, products, software, and technical information (including, but not limited to, services and training) provided pursuant to the Agreement may be subject to U.S. export Laws and regulations. Customer will not use, distribute, transfer, or transmit the services, products, software, or technical information (even if incorporated into other products) except in compliance with U.S. and other applicable export regulations.
- I. Regulatory and Legal Changes.** In the event of any change in Law, regulation or industry change that would prohibit or otherwise materially interfere with RingCentral's ability to provide Services under this Agreement, RingCentral may terminate the affected Services or this Agreement or otherwise modify the terms thereof.
- J. Use of Beta, Preview, or Early Access Software.** If you use any beta, preview, or early access services, features, products, or software offered or made available by RingCentral, then you acknowledge that your use of the services, products, or software are governed by the [Beta Evaluation License Agreement](#) and not by this Agreement.
- K. Entire Agreement.** The Agreement, together with any exhibits, Order Forms, Use Policies, and Attachments, each of which is expressly incorporated into this Agreement with this reference, constitutes the entire agreement between the Parties and supersedes and replaces any and all prior or contemporaneous understandings, proposals, representations, marketing materials, statements, or agreements, whether oral, written, or otherwise, regarding such subject. RingCentral expressly rejects in their entirety any additional or conflicting terms or conditions contained in Customer purchase order, or similar Customer document, which the Parties agree are solely for the Customer's convenience.
- L. Order of Precedence.** In the event of any conflict between the documents comprising this Agreement, precedence will be given to the documents in the following descending order: (i) the applicable Order Form (including any hyperlinks); (ii) the applicable Attachment; (iii) the main body of this Agreement; (iv) Use Policies and Data Processing Addendum incorporated by reference in this Agreement; (v) and any other document expressly referred to in this Agreement which governs the Services; and (vi) Union County's Request for Proposals No. 2025-022, Union County Phone System Upgrade. With respect to data processing, the Data Processing Addendum shall take precedence over any inconsistent terms in any of the documents listed in the previous sentence.
- M. Amendments.** Except as otherwise provided, this Agreement may only be modified by a written amendment executed by authorized representatives of both Parties. In no event will handwritten changes to any terms or conditions, including in the applicable Order Form, be effective.

- N. Severability and Waiver.** In the event any provision of this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, such provision(s) will be stricken and the remainder of this Agreement will remain legal, valid, and binding. The failure by either Party to exercise or enforce any right conferred by this Agreement will not be deemed to be a waiver of any such right or to operate so as to bar the exercise or enforcement of any such or other right on any later occasion. Except as otherwise expressly stated in this Agreement, all rights and remedies stated in the Agreement are cumulative and in addition to any other rights and remedies available under the Agreement, at Law, or in equity.
- O. Execution.** Each Party represents and warrants that: (a) it possesses the legal right and capacity to enter into the Agreement and to perform all of its obligations thereunder; (b) the individual signing the Agreement and (each executable part thereof) on that Party's behalf has full power and authority to execute and deliver the same; and (c) the Agreement will be a binding obligation of that Party. Each Party agrees that an Electronic Signature, whether digital or encrypted, is intended to authenticate this Agreement and to have the same force and effect as manual signatures.
- P. Counterparts.** This Agreement may be executed electronically and in separate counterparts each of which when taken together will constitute one in the same original.
- Q. Survival.** The rights and obligations of either Party that by their nature would continue beyond the expiration or termination of this Agreement or an Order Form will survive expiration or termination of this Agreement or the Order Form, including without limitation payment obligations, warranty disclaimers, indemnities, limitations of liability, definitions and miscellaneous.
- R. Family Education Rights and Privacy Act (FERPA).** Customer Content when in-transit on the RingCentral Network and when at-rest within RingCentral Data Centers may contain communications and/or educational records pertaining to students in connection with the performance of the Services pursuant to the Agreement. RingCentral shall only use or disclose such Customer Content as is reasonably necessary to provide the Services or for RingCentral to otherwise perform its obligations under the Agreement.
- S. Additional Insurance.** RingCentral agrees to comply with the additional insurance terms on Attachment F, which is incorporated herein by reference.

EXHIBIT A DEFINITIONS

Definitions. Capitalized terms used in this Agreement but otherwise not defined have the following meaning:

1. **“Account”** means the numbered account established with RingCentral and associated with Customer and the Services provided to Customer under this Agreement. For billing and convenience purposes, multiple services, Digital Lines, or End Users may be included in a single billing account, and/or a single Customer may have multiple billing accounts encompassing different geographic locations, business units, or other designations as requested by Customer and accepted by RingCentral.
2. **“Account Administrator”** means the person(s) who have been granted authority by Customer to set up, amend, or otherwise control settings and/or make additional purchases for the Account via the Administrative Portal. Account Administrators may have varying levels of Account rights, skills, or permissions.
3. **“Account Data”** means: any business contact information provided with the Account; RingCentral-generated logs of calling or other metadata developed or collected in the provision of the Services; configuration data; and records of Digital Lines and any Services purchased under this Agreement.
4. **“Administrative Fees”** means any administrative recovery fees, 911 cost recovery fees and the like separately charged by RingCentral to Customer.
5. **“Administrative Portal”** means the online administrative portal through which Account Administrators control settings and/or make additional purchases for the Account.
6. **“Affiliate(s)”** means a person or entity that is controlled by a Party hereto, controls a Party hereto, or is under common control with a Party hereto, and “control” means beneficial ownership of greater than fifty percent (50%) of an entity’s then-outstanding voting securities or ownership interests.
7. **“Attachment(s)”** means documents appended to the contract containing additional terms for products and Services. Attachments and the terms and conditions contained therein are part of this Agreement.
8. **“Confidential Information”** means any information disclosed by or on behalf of the Disclosing Party) to the Receiving Party that should reasonably be considered as confidential given the nature of the information and the circumstances surrounding its disclosure.
9. **“Customer Care”** means Customer support operations delivered by RingCentral and/or its subcontractors.
10. **“Customer Content”** means the content of calls, facsimiles, SMS messages, voicemails, voice recordings, shared files, conferences, or other communications transmitted or stored through the Services.
11. **“Digital Line”** means a phone number assigned to an End User or a specifically designated location (e.g., conference room) and the associated voice service for inbound and outbound calling that permits an End User generally to make and receive calls to and from the public switched telephone network as well as to and from other extensions within the same Account.
12. **“Disclosing Party”** means the Party disclosing Confidential Information or on whose behalf Confidential Information is disclosed by such Party’s agents, including but not limited to, its Affiliates, officers, directors, employees, and attorneys.
13. **“Electronic Signatures”** means an electronic sound, symbol, or process, including clicking a digital button to accept, attached to or logically associated with a contract or other record and executed or adopted by a person with the intent to sign the record.
14. **“End Point”** means an application or device through which any End-User might access and/or use any of the Services, including without limitation IP Desk Phones, Desktop Clients, Web Clients, Mobile Applications, and Software Integrations.
15. **“End User”** means an individual user to whom Customer makes the Services available, and may be a natural person, and may include but is not limited to Customer’s employees, consultants, clients, external users, invitees, contractors, and agents.
16. **“Helpdesk Support”** shall mean the performance of the following tasks:
 - Standard feature/functionality (“how to”) support for End Users (i.e. call forwarding, voice mail set-up, etc.).
 - Standard management of the Admin Interface within the product.
 - Support all moves, adds, changes, and deletes of employees.
17. **“Indemnifiable Amounts”** means all (X) damages and other amounts awarded against the Indemnified Party by a court of competent jurisdiction pursuant to a final judgment in connection with such Third-Party Claim; (Y) any amounts payable by the Indemnified Party or its Affiliates pursuant to a binding, written agreement settling the Third Party Claim, provided such agreement is approved in advance in writing by the Indemnifying Party; and (Z) all reasonable costs and expenses paid to third parties by the Indemnified Party or its Affiliates in connection with the Indemnified Party’s or its Affiliates’ attorneys’ fees and related expenses.
18. **“Indemnifying Party”** and **“Indemnified Party”** have the meanings set forth in Section 11(C) (Defense and Indemnification Procedures).
19. **“Initial Term”** has the meaning set forth in Section 2(D) (Services Term).

20. **“Intellectual Property Rights”** or **“IP Rights”** means all common law and statutory rights (whether registered or unregistered, or recorded or unrecorded, regardless of method) arising out of or associated with: (a) patents and patent applications, inventions, industrial designs, discoveries, business methods, and processes; (b) copyrights and copyright registrations, and “moral” rights; (c) the protection of trade and industrial secrets and Confidential Information; (d) other proprietary rights relating to intangible property; (e) trademarks, trade names and service marks; (f) a person’s name, likeness, voice, photograph or signature, including without limitation rights of personality, privacy, and publicity; (g) analogous rights to those set forth above; and (h) divisions, continuations, continuations-in-part, renewals, reissues and extensions of the foregoing (as applicable).
21. **“Law”** means any law, statute, regulation, rule, ordinance, administrative guidance, treaty or convention, or court or administrative order or ruling of any governing Federal, State, local or non-U.S. governmental body with jurisdiction over the Services.
22. **“Order Form(s)”** means a request for Service describing the type and quantity of Services required by Customer and submitted and accepted by the Parties in accordance with Section 2(A) (Ordering Services). The Order Form may be presented and executed via the Administrative Portal.
23. **“Receiving Party”** means the Party or its agents, including, but not limited to its Affiliates, officers, directors, employees, and attorneys receiving Confidential Information.
24. **“Renewal Term”** has the meaning set forth in Section 2(D) (Services Term).
25. **“RingCentral Network”** means the network and supporting facilities between and among the RingCentral points of presence (“PoP(s)”), up to and including the interconnection point between the RingCentral’s network and facilities, and the public Internet, and the Public Switched Telephone Network (PSTN). The RingCentral Network does not include the public Internet, a Customer’s own private network, or the PSTN.
26. **“Service(s)”** means all services provided under this Agreement and set forth in one or more Order Form(s).
27. **“Start Date”** means the date so identified in the relevant Order Form or the date on which Customer orders Services via the Administrative Portal.
28. **“Taxes”** means any and all federal, state, local, municipal, foreign, and other taxes and fees charged or collected from Customers, including but not limited to any Universal Service Fund, TRS and 911 taxes and fees.
29. **“Term”** means the Initial Term plus any Renewal Terms.
30. **“Third Party Claim”** has the meaning set forth in Section 11(A) (Indemnification by RingCentral).
31. **“Use Policy”** refers to any of the policies identified in Section 5(B) (Use Policies).

ATTACHMENT A SERVICE ATTACHMENT - RINGEX SERVICES

This Service Attachment is a part of the Master Services Agreement (the “**Agreement**”) that includes the terms and conditions agreed by the Parties under which RingCentral will provide to the Customer the RingEX Services as described under the applicable Order Form (the “**Services**”).

1. Service Overview

The Services are a cloud-based unified communications service that includes enterprise-class voice, fax, call handling, mobile apps, and bring-your-own-device (BYOD) capability that integrates with a growing list of applications.

The Services include:

- Voice Services, including extension-to-extension calling and the ability to make and receive calls to and from the public switched telephone network (PSTN)
- Video and audio-conferencing service, including screen sharing
- Collaboration Tools, including One-to-One and Team Chat, File Sharing, task management, SMS/Texting (where available), and other innovative tools

The Services may be accessed from a variety of user End Points, including IP Desk Phones, Desktop Clients, Web Clients, Mobile Applications, and Software Integrations.

2. RingEX Purchase Plans

A. Tiers of Service. The Services are made available in several pricing tiers, which are described more fully at <https://www.ringcentral.com/office/plansandpricing.html>. While RingCentral offers unlimited monthly plans for some of its products and services, RingCentral Services are intended for regular business use. “Unlimited” use does not permit any use otherwise prohibited by the Acceptable Use Policy, available at <https://www.ringcentral.com/legal/acceptable-use-policy.html>, including trunking, access stimulation, reselling of the Services, etc. Use of the RingCentral AI Assistant capabilities is subject to the applicable terms contained in the AI Assistant Add-On Service Description available at <https://www.ringcentral.com/legal/add-on-services.html#qlnks-12>.

B. Minute and Calling Credit Bundles. Each plan includes a number of Toll-Free minutes, per month, which are pooled to create a single allotment of Toll-Free minutes available for the entire account. Core/Advanced/Ultra tier plans include a monthly allotment of 100/1000/10000 toll free minutes per account, respectively. Overage charges of 3.9¢ per minute apply to calls made in excess of allotment.

International Calling Credit Bundles can be purchased in addition to any base amount included with the purchased tier. International External Calls are charged against Calling Credits on the Account per destination rates, or as overage once Calling Credits are exceeded. Currently effective rates are available at <https://www.ringcentral.com/support/international-rates.html>.

Extension-to-Extension Calls within the Customer account never incur any usage fee and are unlimited, except to the extent that such calls are forwarded to another number that is not on the Customer account.

Additional Calling Credits may be purchased through the Auto-Purchase feature, which can be selected for automatic purchase in various increments on the Administrative Portal. Auto-Purchase is triggered when the combined usage of all End Users on an Account exceeds the total Calling Credits or when End Users make calls with additional fees (e.g., 411).

Minute Bundles and Calling Credit Bundles expire at the end of month and cannot roll over to the following month. Auto-Purchased Calling Credits expire twelve (12) months from date of purchase. Bundles may not be sold, transferred, assigned, or applied to any other customer.

C. Enhanced Business SMS Allotment and Pricing. Each plan includes a number of SMS per each user, per month, which are pooled to create a single allotment of SMS available to the entire account. Core/Advanced/Ultra tier plans include a monthly allotment of 25/100/200 SMS, per user respectively. Each SMS sent or received will be deducted from the pool of available SMS on the account. Overage charges apply to SMS sent or received in excess of allotment and will be charged at the then-applicable rates, available at <https://www.ringcentral.com/support/new-sms-rates.html>. Additional SMS bundles are available for purchase at discounted prices. Customer must successfully register phone numbers with the SMS registrar prior to using SMS. RingCentral may attempt to deliver SMS sent from unregistered phone numbers at its discretion, however unregistered SMS are excluded from the monthly allotment and any purchased SMS bundles, and will be charged at then-applicable unregistered SMS rates, available at <https://www.ringcentral.com/support/new-sms-rates.html>.

3. Operator Assisted Calling, 311, 511 and other N11 Calling

RingCentral does not support 0+ or operator assisted calling (including, without limitation, collect calls, third party billing calls, 900, or other premium line numbers or calling card calls). The Services may not support 211, 311, 411, 511 and/or N11 calling. To the extent they are supported, additional charges may apply for these calls.

4. Directory Listing Service

RingCentral offers directory listing (the “**Directory Listing Service**”). If Customer subscribes to the Directory Listing Service, RingCentral will share certain Customer Contact Data with third parties as reasonably necessary to include in the phone directory (“**Listing Information**”). This information may include, but is not limited to, Customer’s company name, address, and phone numbers. Customer authorizes RingCentral to use and disclose the Listing Information for the purpose of publishing in, and making publicly available through, third-party directory listing services, to be selected by RingCentral or third-party service providers in their sole discretion. Customer acknowledges and agrees that by subscribing to the Directory Listing Service, Customer’s Listing Information may enter the public domain and that RingCentral cannot control third parties’ use of such information obtained through the Directory Listing Service.

- A. **Opt Out.** Customer may opt out of the Directory Listing Service at any time; however, RingCentral is not obligated to have Customer’s Listing Information removed from third-party directory assistance listing services that have already received Customer’s information.
- B. **No Liability.** RingCentral will have no responsibility or liability for any cost, damages, liabilities, or inconvenience caused by calls made to Customer’s telephone number; materials sent to Customer, inaccuracies, errors or omissions with Listing Information; or any other use of such information. RingCentral will not be liable to Customer for any use by third parties of Customer’s Listing Information obtained through the Directory Listing Service, including without limitation the use of such information after Customer has opted out of the Directory Listing Service.

5. Global RingEX or RingCentral Global Office.

Global RingEX (which is also known as RingCentral Global Office and references in the Service Description to Global RingEX shall also refer to Global Office) provides a single communications system to companies that have offices around the world, offering localized service in countries for which Global RingEX is available. Additional information related to Global RingEX Services is available at <http://www.ringcentral.com/legal/policies/global-office-countries.html>. This section sets forth additional terms and conditions concerning RingCentral’s Global RingEX for customers that subscribe to it.

- A. **Emergency Service Limitations for Global RingEX.** RingCentral provides access to Emergency Calling Services in many, but not all, countries in which RingCentral Global RingEX is available, allowing End Users in most countries to access Emergency Services. Emergency Services may only be accessed within the country in which the Digital Line is assigned, e.g., an End User with a Digital Line assigned in Ireland may dial Emergency Services only within Ireland. Access to Emergency Calling Services in RingCentral Global RingEX countries, where available, is subject to the Emergency Services Policy, available at <https://www.ringcentral.com/legal/emergency-services.html>. Customer must make available and will maintain at all times traditional landline and/or mobile network telephone services that will enable End Users to call the applicable Emergency Services number. Customer may not use the RingCentral Services in environments requiring fail-safe performance or in which the failure of the RingCentral Services could lead directly to death, personal injury, or severe physical or environmental damage.
- B. **Global RingEX Provided Only in Connection with Home Country Service.** RingCentral provides Global RingEX Service only in connection with Services purchased in the Home Country. RingCentral may immediately suspend or terminate Customer’s Global RingEX Services if Customer terminates its Digital Lines in the Home Country. All invoicing for the Global RingEX Services will be done in the Home Country on the Customer’s Account, together with other Services purchased under this Agreement, using the Home Country’s currency. Customer must at all times provide a billing address located in the Home Country. RingCentral will provide all documentation, licenses, and services in connection with the Global RingEX Service in English; additional language support may be provided at RingCentral’s sole discretion.
- C. **Primary Place of Use of Global RingEX Service.** Customer represents and warrants that the primary place of use of the Global RingEX Services will be the country in which the Digital Line is assigned, e.g., an End User with a Digital Line assigned in Ireland will primarily use that Digital Line in Ireland.
- D. **Relationships with Local Providers.** In connection with the provision of Global RingEX Services, RingCentral relies on local providers to supply certain regulated communication services; for example (i) for the provision of local telephone numbers within local jurisdictions; (ii) to enable you to place local calls within local jurisdictions; and (iii) to enable you to receive calls from non-RingCentral numbers on Customer’s Global RingEX telephone number(s), by connecting with the local public switched telephone network. Customer hereby appoints RingCentral as Customer’s agent with power of attorney (and such appointment is coupled with an interest and is irrevocable during the Term) to conclude and enter into agreements with such local providers on Customer’s behalf to secure such services. RingCentral’s locally licensed affiliates provide all telecommunications services offered to Customer within the countries in which such affiliates are licensed; in some cases, RingCentral may obtain services from locally licensed providers on Customer’s behalf. RingCentral is responsible for all contracting, billing, and customer care related to those services. Customer is responsible for providing RingCentral with all information necessary for RingCentral to obtain numbers in Global RingEX countries.

6. **Additional Services.** RingCentral offers add-on services for the Services (where available), which are described at <https://www.ringcentral.com/legal/microsoft-teams-services-attachment.html>. Additional terms or charges may apply, depending on the selected features.
7. **Bring Your Own Carrier (BYOC) Services.** RingCentral offers a software-as-a-service in which customers provide and maintain their own local telecommunications services, which may be connected to RingCentral's cloud PBX, videoconferencing, and team messaging services. BYOC and additional terms are described and available at <https://www.ringcentral.com/legal/BYOC-service-description.html>.
8. **Definitions.** Terms used herein but not otherwise defined have the meanings ascribed to them in the Agreement. For purposes of this Service Attachment, the following terms have the meanings set forth below:
- A. **“Digital Line”** means a phone number assigned to an End User or a specifically designated location (e.g., conference room) and the associated voice service for inbound and outbound calling that permits the End User generally to make and receive calls to and from the public switched telephone network as well as to and from other extensions within the same Account.
 - B. **“End Point”** means an application or device through which any End-User might access and/or use any of the Services, including without limitation IP Desk Phones, Desktop Clients, Web Clients, Mobile Applications, and Software Integrations.
 - C. **“Extension-to-Extension Calls”** means calls made and received between End Points on the Customer Account with RingCentral, regardless of whether the calls are domestic or international.
 - D. **“External Calls”** means calls made to or received from external numbers on the PSTN that are not on the Customer Account with RingCentral.
 - E. **“Home Country”** means the United States or the country that is otherwise designated as Customer's primary or home country in the Order Form.

ATTACHMENT B

SERVICE ATTACHMENT - RINGCX SERVICES

This Service Attachment is a part of the Master Services Agreement (the “**Agreement**”) that includes the terms and conditions agreed by the Parties under which RingCentral will provide to the Customer the RingCX Services as described under the applicable Order Form.

In the event of any conflict between the provisions of the Agreement and the provisions of this Service Attachment, such provisions of this Service Attachment will prevail.

1. Service Overview

“**RingCX Services**” is a cloud-based, contact center and omnichannel communications solution consisting of inbound and outbound voice media routing, queuing, and distribution as well as digital channel management, and related services, applications, and features, whether included as part of a Subscription Package or ordered separately.

2. Billing and Payment

A. Billing

Starting at the Start Date set forth in the Order Form and until the end of the Term, You agree to pay for: a) the RingCX Services fees for at least the number of Seats set forth in the RingCX Services Order (as amended as permitted below) (an “**RingCX Contract Seat**”) based on the per Seat pricing set forth in the RingCX Services Order (the “**RingCX Contract Seat Price**”), as amended from time to time, regardless of the number of Seats being used; b) any Usage (per minute) fees; c) any Subscription Packages set forth in the RingCX Services Order (e.g. Interactive RingCX Response, minutes, international minutes); and d) any additional fees set forth in the RingCX Services Order.

B. Adding New RingCX Contract Seats

You may add RingCX Contract Seats at any time either through a new RingCX Services Order or a written amendment executed by You and RingCentral. The RingCX Services fees related to these additional RingCX Contract Seats will be billed at the per Seat price set forth in the RingCX Order form. For the avoidance of doubt, You will be required to pay for RingCX Services fees related to these additional RingCX Contract Seats until the end of the Term.

C. Adding On-Demand RingCX Seats

At any time, You may utilize additional Seats with your RingCX Services on an as-needed basis (each, an “**On-Demand RingCX Seat**”). You will be billed for any RingCX Services at the rate of the RingCX Contract Seat Price plus an overage charge of 20 USD per month per Seat (the “**On-Demand RingCX Price**”) until You remove this On-Demand RingCX Seat from Your RingCX Services subscription (which You may do at any time in your discretion). RingCX Services fees for any On-Demand RingCX Seats will be charged for the full month, regardless of the number of days used. For each monthly billing period, You will be charged for the highest number of On-Demand RingCX Seats used within such billing period. Fees for other RingCX Service licenses may be billed at the price set forth in the RingCX Order Form.

3. RingCX Services, Settings, and Modifications

A RingEX account is required to use the RingCX Services. The settings and preferences for your RingCX Services, including without limitation user rights, user skills, and permissions; routing, scripts; registration Information; and activation of On-Demand RingCX Seats, among others, may be set and modified by those individuals whom You allow to have access to the web console (“**Account Administrators**”). The Customer acknowledges that the acts or omissions of the Account Administrators may result in additional charges or affect RingCX Services. The Customer will be solely responsible for the acts or omissions and the impact on billable amounts of the Account Administrators.

4. Use of RingCX Services

You acknowledge and agree that all use of the RingCX Services shall be subject to this Service Attachment and the Agreement, including without limitation the use policies and data privacy policies. You acknowledge and agree that You are fully responsible and liable for all use of the RingCX Services, any software or hardware used in conjunction with the RingCX Services, and any and all fees and charges that are incurred as a result of such use. Notwithstanding anything to the contrary stated in the Agreement, the use of the RingCX Services shall be subject to the following terms:

A. NO 911 SERVICE. YOU ACKNOWLEDGE AND AGREE THAT 911 / EMERGENCY CALLS OR MESSAGES MAY NOT BE PLACED OR SENT THROUGH THE RINGCX SERVICES, AND NO 911 CALLING OR SMS OR OTHER EMERGENCY MESSAGING SERVICE IS OFFERED OR PROVIDED WITH THE RINGCX SERVICES. YOU MUST MAKE AVAILABLE ALTERNATIVE ARRANGEMENTS TO PLACE 911 CALLS.

B. Customer 911 Notification Obligations. You represent, warrant, and covenant that: (i) You shall ensure that any person who might use the RingCX Services or be present at the physical location where any the RingCX Services might be accessed or used is fully informed and aware that he or she will not be able to place calls or send messages to 911 or other emergency response services through the RingCX Services; and (ii) You shall provide all of the foregoing parties with an alternate method by which to place such calls and, as applicable, to send such messages.

C. Cardholder Data. You acknowledge and agree that when using RingCX Services, You will not record or store Cardholder Data (“**CHD**”) as that term is defined by the PCI Data Security Standard. If You are required to receive CHD using the RingCX Services, You will pause any recordings or otherwise ensure that no CHD is being recorded or saved.

5. Compliance and Regulations

You disclaim and deny any reliance on any marketing materials relating to the RingCX Services with regard to Telephone Consumer Protection Act (“**TCPA**”) compliance and/or the Telemarketing Sales Rule. Any statements regarding the TCPA or other legal compliance are opinion only, and You are ultimately responsible for making your own determinations regarding the requirements of the TCPA and its applicability to the RingCX Services.

RingCentral shall not redesign or otherwise modify its Manual Dial product, including any relevant hardware or software, in a manner that would give it the capacity to dial randomly or sequentially generated numbers, function as a predictive dialer or dial numbers in any manner that does not require human intervention for each call.

6. Definitions

Terms used herein but not otherwise defined have the meanings ascribed to them in the Agreement. For purposes of this Service Attachment, the following terms have the meanings set forth below:

- A. **“RingCX Materials”** means documentation, either electronic or otherwise, that RingCentral provides or makes available to the Customer describing the RingCX Services, including the components of each Subscription Package, if applicable, and any other features and functionality offered as part of the RingCX Services. The RingCX Materials may include without limitation manuals, product descriptions, user or installation instructions, diagrams, printouts, listings, flowcharts, and training materials related to the RingCX Services.
- B. **“RingCX Services Order”** is an Order form executed by the Parties under the terms of the Agreement and this Service Attachment, setting out the details of the subscription to the RingCX Services, including any Subscription Package, and any additional products, services and functionality purchased by the Customer.
- C. **“Interactive Voice Response”** or **“IVR”** means a module that allows customers to script automated voice interactions, accessing third-party services and databases when needed to service the customer. IVR-only packages do not include any services or restrictions related to Seats.
- D. **“Seat”** means either: i) a named license based on the named persons that use the RingCX Services, or ii) a concurrent license based on the number of persons simultaneously using the RingCX Services. Each Seat includes 2,000 minutes of IVR per month and unlimited inbound and manually dialed outbound domestic minutes. All use is subject to the Acceptable Use Policy. Overages apply.
- E. **“Subscription Package”** is a set of RingCX Services features and applications, as further defined in the RingCX Materials, that could be ordered as a bundle.
- F. **“Usage”** means any charges incurred in connection with the use of your RingCX Services, including, without limitation, local, long-distance, international, and toll-free minutes, charges, and any products listed on the RingCX Service Order.

ATTACHMENT C
SERVICE LEVEL AGREEMENT FOR RINGEX SERVICES

This Service Level Agreement for RingEX Services (the “**RingEX SLA**”) is a part of the Master Services Agreement (the “**Agreement**”) that includes the Service Availability levels RingCentral commits to deliver on the RingCentral Network for RingEX Services.

1. Overview

RingCentral will maintain the following performance levels:

	Performance Level
Voice Services Availability (Monthly Calculation)	99.999%
Quality of Voice Service (Monthly Calculation)	3.8 MOS Score

2. Minimum Eligibility

Customer is entitled to the benefits of this RingEX SLA only to the extent that Customer maintains a minimum of fifty (50) Digital Lines under the RingEX Service Attachment with a minimum twelve (12) month Term. This RingEX SLA shall not apply to any period of time where Customer does not meet the foregoing requirements.

3. Service Delivery Commitments

A. Calculation of Service Availability for Voice Services

Service Availability = $[1 - ((\text{number of minutes of Down Time} \times \text{number of Impacted Users}) / (\text{total number users} \times \text{total number of minutes in a calendar month}))] \times 100$

Service Availability shall be rounded to nearest thousandth of a percent in determining the applicable credit. Service Credits for Down Time will not exceed 30% MRC.

B. Calculation of Service Credits

Customer is entitled to the Accelerated Service Credits calculated based on the table below:

B.1 Accelerated Service Credit Table

Voice Service Availability	Service Credits
≥ 99.999%	0% MRC
≥ 99.500% and < 99.999%	5% MRC
≥ 99.000% and < 99.500%	10% MRC
≥ 95.000% and < 99.000%	20% MRC
< 95.000%	30% MRC

C. No Cumulative Credits

Where a single incident of Down Time affects RingEX Services and any other Services provided by RingCentral and covered under a separate service level agreement executed between the parties, resulting in Service Credits under both agreements, Customer is entitled to claim Service Credits under one of the agreements, but not for both.

Service Credits to be paid under this RingEX SLA will be calculated based on Customer's RingEX MRC only and will not include any other fees paid by RingCentral for any other Services, (e.g., Contact Center Services). Service Credits may not exceed the total MRC paid for the relevant Services.

D. Qualifying for Service Credits

Service Credits for Down Time will accrue only to the extent:

- i. Down Time exceeds 1 minute.
- ii. Customer reports the occurrence of Down Time to RingCentral by opening a Support Case within twenty-four (24) hours of the conclusion of the applicable Down Time period.
- iii. RingCentral confirms that the Down Time was the result of an outage or fault on the RingCentral Network.
- iv. Customer is not in material breach of the Agreement, including its payment obligations.
- v. Customer must submit a written request for Service Credits to Customer Care within thirty (30) days of the date the Support Case was opened by Customer, including a short explanation of the credit claimed and the number of the corresponding Support Case.

4. Quality of Service Commitments

- A. **Quality of Service Targets.** RingCentral will maintain an average MOS score of 3.8 over each calendar month for Customer Sites in the Territory, except to the extent that Customer endpoints connect via public Wi-Fi, a low bandwidth mobile data connection (3G or lower), or Customer uses of narrowband codecs such as G.729.
- B. **Quality of Service Report.** Customer may request a Quality of Service Report for the preceding calendar month by submitting a Support Case. RingCentral will endeavor to provide the Quality of Service Report within five (5) business days.
- C. **Diagnostic Investigation.** If the Quality of Service Report shows a failure to meet the target 3.8 average MOS as calculated under this Section, RingCentral will use industry-standard diagnostic techniques to investigate the cause of the failure. Customer shall cooperate with RingCentral in this investigation fully and in good faith.
- D. **Diagnostic Remediation.** Based on its investigation, RingCentral will provide a reasonable determination of the root cause(s) of any failure for the quality of service to meet the target MOS of 3.8. RingCentral will resolve any root cause(s) on the RingCentral Network; Customer shall timely implement settings or other resolution advised by RingCentral to improve the quality of service.

5. Chronic Service Failures

- E. **Service Availability.** Customer may terminate the Agreement without penalty, and will receive a pro-rata refund of all prepaid, unused fees in the following circumstances if RingCentral fails to meet a Service Availability of at least 99.9% on the RingCentral Network for Voice Services during any three (3) calendar Months in any continuous 6 Month period, and customer has timely reported Down Time as set forth herein.
- F. **Quality of Service.** Customer may terminate the affected Customer Sites under its Agreement without penalty, and will receive a pro-rata refund of all prepaid, unused fees in the following circumstances if RingCentral fails to meet a minimum 3.5 MOS, as measured in duly requested Quality of Service Reports, for the affected Customer Sites within 4 months of the date of Customer's initial Support Case requesting a Quality of Service Report, except that such right inures only to the extent that Customer has complied fully and in good faith with the cooperation requirements and timely implemented all suggestions from RingCentral, in RingCentral's sole reasonable judgment.
- G. To exercise its termination right under this RingEX SLA, Customer must deliver written notice of termination to RingCentral no later than ten (10) business days after its right to terminate under this Section accrues.

6. Sole Remedy

The remedies available pursuant to this RingEX SLA (i.e. the issuance of credits and termination for chronic service failure) shall be Customer's sole remedy for any failure to meet committed services levels under this RingEX SLA.

7. Definitions

Terms used herein but not otherwise defined have the meanings ascribed to them in the Agreement. For purposes of this Service Level Agreement, the following terms have the meanings set forth below:

- A. **"Down Time"** is an unscheduled period during which the Voice Services for RingEX on the RingCentral Network are interrupted and not usable, except that Down Time does not include unavailability or interruptions due to (1) acts or omissions of Customer; (2) an event of a Force Majeure; or (3) Customer's breach of the Agreement. Down Time begins to accrue after one (1) minute of unavailability, per incident.
- B. **"Impacted User"** means a user with a Digital Line affected by Down Time. In the event that due to the nature of the incident it is not possible for RingCentral to identify the exact number of users with a Digital Line affected by Down Time, RingCentral will calculate the Impacted Users on a User-Equivalency basis as defined below.
- C. **"MOS"** means the Mean Opinion Score, determined according to the ITU-T E-model, as approved in June 2015, rounding to the nearest tenth of a percent. MOS provides a prediction of the expected voice quality, as perceived by a typical telephone user, for an end-to-end (i.e. mouth-to-ear) telephone connection under conversational conditions. MOS is measured by RingCentral using network parameters between the Customer endpoint, e.g., the IP Phone or Softphone, and the RingCentral Network, and will accurately reflect quality of the call to the caller using the Voice Services.
- D. **"MRC"** means the monthly recurring subscription charges (excluding taxes, administrative or government mandated fees, metered billings, etc.) owed by Customer to RingCentral for RingEX Services for the relevant month. If customer is billed other

than on a monthly basis, MRC refers to the pro-rata portion of the recurring subscription charges for the relevant calendar month. MRC does not include one-time charges such as phone equipment costs, set-up fees, and similar amounts, nor does it include any charges or fees for services other than RingEX Services.

- E. **“Quality of Service Report”** means a technical report provided by RingCentral, detailing MOS and related technical information.
- F. **“RingCentral Network”** means the network and supporting facilities between and among the RingCentral points of presence (“PoP(s)”), up to and including the interconnection point between the RingCentral’s network and facilities, and the public Internet, and the PSTN. The RingCentral Network does not include the public Internet, a Customer’s own private network, or the Public Switched Telephone Network (PSTN).
- G. **“Service Availability”** is the time for which Voice Services for RingEX are available on the RingCentral Network, expressed as a percentage of the total time in the relevant calendar month, and calculated as set forth above.
- H. **“Service Credits”** means the amount that RingCentral will credit a Customer’s account pursuant to this RingEX SLA.
- I. **“Site”** means a physical location in the Territory at which Customer deploys and regularly uses at least five (5) RingCentral Digital Lines. A Digital Line used outside such physical location for a majority of days in the relevant calendar month, such as home offices, virtual offices, or other remote use, will not be included in the line count for this purpose.
- J. **“Support Case”** means an inquiry or incident reported by the Customer, through its Helpdesk Support, to Customer Care via the designated Customer Care portal.
- K. **“Territory”** means those countries in which Customers subscribes to RingEX or Global RingEX Services.
- L. **“User-Equivalency”** means the calculation made by RingCentral to estimate the percentage of the Voice Services impacted by the Down Time. RingCentral may use number of calls, network, device information, vendor and customer reports, and its own technical expertise to make these calculations.
- M. **“Voice Services”** means the audio portion of the Services, across endpoints, including the Softphone, and IP desk phone.

ATTACHMENT D
SERVICE LEVEL AGREEMENT FOR RINGCX SERVICES

This Service Level Agreement for RingCX Services (the “**RingCX SLA**”) is a part of the Master Services Agreement (the “**Agreement**”) that includes the Service Availability levels RingCentral commits to deliver on the RingCentral Network for RingCX Services.

1. Overview

RingCentral will maintain the Quality of Service for the RingCX Core Services at the performance levels as defined below:

	Core Services
Service Availability (Monthly Calculation)	99.999%
Maximum Credit	30% of MRC

- 2. Minimum Eligibility.** Customer is entitled to the benefits of this RingCX SLA only to the extent that Customer maintains a minimum of ten (10) RingCX Seats under the Agreement with a minimum twelve (12) month Initial Term and twelve (12) month Renewal Term. This RingCX SLA shall not apply to any period of time where Customer does not meet the foregoing requirements.

3. Service Delivery Commitments

A. Calculation of Service Availability

Service Availability = $[1 - ((\text{number of minutes of Down Time} \times \text{number of impacted users}) / (\text{total number users} \times \text{total number of minutes in a calendar month}))] \times 100$

Availability shall be rounded to nearest hundredth of a percent in determining the applicable credit.

B. Calculation of Service Credits

- i. Service Credits only begin to accrue after Service Availability falls below a certain percentage (shown in the tables below).
- ii. Customer is entitled to Service Credits for the RingCX Core Services according to the following table:

Service Availability	Service Credits
≥ 99.999%	0% MRC
≥ 99.500% and < 99.999%	5% MRC
≥ 99.000% and < 99.500%	10% MRC
≥ 95.000% and < 99.000%	20% MRC
< 95.000%	30% MRC

C. Qualifying for Service Credits. Service Credits for Down Time will accrue only to the extent:

- i. Service Availability falls below the percentage as illustrated in the tables (above) under Calculation of Service Credits.
- ii. Customer reports the occurrence of Down Time to RingCentral Customer Service by opening a Support Case within twenty-four (24) hours of the beginning of the applicable Down Time period.
- iii. Customer must submit a written request for Service Credits to Customer Care within ten (10) business days of the date the Support Case was opened by Customer, including a short explanation of the credit claimed and the number of the corresponding Support Case.
- iv. RingCentral confirms that the Down Time was the result of an outage or fault on the RingCentral Network.
- v. Customer is not in material breach of the Agreement, including its payments obligations.

D. Finality of Decisions. Credits may be issued in RingCentral's sole reasonable discretion and will expire at the expiration or termination of the Agreement.

4. Chronic Service Failures

- A. **Service Availability.** Customer may terminate the Agreement without penalty and will receive a pro-rata refund of all prepaid, unused fees if customer accrues Maximum Service Credits for Down Time for RingCX Core Services during any three (3) calendar Months in any continuous 6-Month period, and customer has timely reported Down Time as set forth herein.
- B. To exercise its termination right under this RingCX SLA, Customer must deliver written notice of termination to RingCentral no later than ten (10) business days after its right to terminate under this Section accrues.

5. Sole Remedy

The remedies available pursuant to this RingCX SLA (i.e., the issuance of credits and termination for chronic service failure) shall be Customer's sole remedy for any failure to meet committed services levels under this Agreement.

6. Definitions

Terms used herein but not otherwise defined have the meanings ascribed to them in the Agreement. For purposes of this Service Level Agreement, the following terms have the meanings set forth below:

- A. **"RingCX Services"** include Core Services and Non-Core Services.
- B. **"Core Services" includes the following services:**
 - i. Inbound and Outbound Call Termination (excluding automated dialing).
 - ii. Inbound and outbound digital interactions.
 - iii. Agent and supervisor log-in.
- C. **"Down Time"** is an unscheduled period during which the RingCX Services on the RingCentral Network are interrupted and not usable, except that Down Time does not include unavailability or interruptions due to (1) acts or omissions of Customer; (2) an event of a Force Majeure; or (3) Customer's breach of the Agreement.
- D. **"Interactive Voice Response" or "IVR"** means a module that allows customers to script automated voice interactions, accessing third party services and databases when needed to service the customer.
- E. **"MRC"** means the monthly recurring subscription charges (excluding taxes, administrative or government mandated fees, metered billings, etc.) owed by Customer to RingCentral for RingCX Services for the relevant month. If customer is billed other than on a monthly basis, MRC refers to the pro-rata portion of the recurring subscription charges for the relevant calendar month. MRC does not include one-time charges such as phone equipment costs, set-up fees, and similar amounts, nor does it include any charges or fees for services other than RingCX Services.
- F. **"Non-Core Services"** means any features not expressly identified as a Core Service. For the avoidance of doubt, Non-Core Services includes the following features:
 - i. Historical Reports.
 - ii. RealTime Dashboards.
 - iii. Call Recording Administration, Delivery, and Retrieval.
 - iv. Integrations, including Workforce Management, Workforce Optimization, and CRM.
- G. **"RingCentral Network"** means the network and supporting facilities between and among the RingCentral points of presence ("PoP(s)"), up to and including the interconnection point between the RingCentral's network and facilities, and the public Internet, and the PSTN. The RingCentral Network does not include the public Internet, or the Public Switched Telephone Network (PSTN). The RingCentral Network includes the facilities of underlying provider of the RingCX Services subcontracted by RingCentral.
- H. **"Service Availability"** is the time for which RingCX Services are available on the RingCentral Network, expressed as a percentage of the total time in the relevant calendar month, and calculated as set forth below.
- I. **"Service Credits"** means the amount that RingCentral will credit a Customer's account pursuant to this RingCX SLA.
- J. **"Support Case"** means an inquiry or incident reported by the Customer, through its Helpdesk Support, to Customer Care via the designated Customer Care portal.

ATTACHMENT E
RINGCENTRAL SECURITY ADDENDUM

1. Scope

This document describes the Information Security Measures (“**Measures**”) that RingCentral has in place when processing Protected Data through RingCentral Services.

2. Definitions

For purposes of this Security Addendum only, capitalized terms, not otherwise defined herein, have the meaning set forth in the Agreement.

- A. “Ring Central Services”, or “Services”,** means services offered by RingCentral and acquired by the Customer.
- B. “Customer”** means the entity that entered into the Agreement with RingCentral.
- C. “Protected Data”** means Customer and partner data processed by RingCentral Services, as defined in the applicable RingCentral DPA or Agreement, including “personal data” and “personal information” as defined by applicable privacy laws, confidential data as defined in the Agreement, account data, configuration data, communication content including messages, voicemail, and video recording.
- D. “Agreement”** means the agreement in place between RingCentral and the Customer for the provision of the Services.
- E. “Personnel”** means RingCentral employees, contractors or subcontracted Professional Services staff.

3. Information Security Management

A. Security Program

RingCentral maintains a written information security program that:

- i. Includes documented policies or standards appropriate to govern the handling of Protected Data in compliance with the Agreement and with applicable law.
- ii. Is managed by a senior employee responsible for overseeing and implementing the program.
- iii. Includes administrative, technical, and physical safeguards reasonably designed to protect the confidentiality, integrity, and availability of Protected Data.
- iv. Is appropriate to the nature, size, and complexity of RingCentral’s business operations.

B. Security Policy Management

RingCentral’s security policies, standards, and procedures:

- i. Align with information security established industry standards.
- ii. Are subject to ongoing review.
- iii. May be revised to reflect changes in industry best practices.

C. Risk Management

RingCentral:

- i. Performs cybersecurity risk assessments to identify threats to their business or operations at least annually.
- ii. Updates RingCentral policies, procedures and standards as needed to address threats to RingCentral’s business or operations.

4. Independent security assessments

A. External Audit

RingCentral:

- i. Uses qualified independent third-party auditors to perform security audits covering systems, environments, and networks where Protected Data is processed, including
 - a. SOC2 Type II
 - b. IES/ISO 27001.
- ii. maintains additional audits and compliance certifications as appropriate for RingCentral’s business and as identified at www.ringcentral.com/trust-center.html.

B. Distribution of Reports

Copies of relevant audit reports and certifications:

- i. Will be provided to Customer on request.

- ii. Are subject to Non-Disclosure Agreement.

C. Annual Risk Assessment Questionnaire

Customer may, on one (1) occasion within any twelve (12) month period, request that RingCentral complete a third-party risk assessment questionnaire within a reasonable time frame.

In case of conflict between this section and the equivalent section in the RingCentral DPA, the DPA takes precedence.

5. Human Resource Security

A. Background Checks

RingCentral requires pre-employment screenings of all employees. RingCentral ensures criminal background searches on its employees to the extent permitted by law. Each background check in the US includes:

- i. An identity verification (SSN trace).
- ii. Criminal history checks for up to seven (7) years for felony and misdemeanors at the local, state, and federal level, where appropriate.
- iii. Terrorist (OFAC) list search, as authorized by law.

Internationally, criminal history checks are conducted as authorized by local law.

Background checks are conducted by a member of the National Association of Professional Background Screeners or a competent industry-recognized company in the local jurisdiction.

B. Training

RingCentral will ensure that all employees including contractors:

- i. Complete annual training to demonstrate familiarity with RingCentral's security policies.
- ii. Complete annual training for security and privacy requirements, including CyberSecurity awareness, GDPR, and CCPA.
- iii. Have the reasonable skill and experience suitable for employment and placement in a position of trust within RingCentral.

C. Workstation Security

RingCentral ensures that:

- i. RingCentral employees either use RingCentral owned and managed devices in the performance of their duties or Bring Your Own Device (BYOD) device.
- ii. All devices, whether RingCentral owned and managed or Bring Your Own Device (BYOD) device, are enrolled in the full RingCentral managed device program.

D. Data Loss Prevention

RingCentral employs a comprehensive system to prevent the inadvertent or intentional compromise of RingCentral data and Protected Data.

E. Due Diligence Over Sub-Contractors

RingCentral will:

- i. maintain a security process to conduct appropriate due diligence prior to engaging sub-contractors.
- ii. assess the security capabilities of any such sub-contractors on a periodic basis to ensure subcontractors' ability to comply with the Measures described in this document.
- iii. apply written information security requirements that oblige sub-contractors to adhere to RingCentral's key information security policies and standards consistent with and no less protective than these Measures.

F. Non-Disclosure

RingCentral ensures that employees and contractors/sub-contractors who process Protected Data are bound in writing by obligations of confidentiality.

6. Physical Security

A. General

RingCentral:

- i. Restricts access to, controls, and monitors all physical areas where RingCentral Services process Protected Data ("**Secure Areas**").
- ii. Maintains appropriate physical security controls on a 24-hours-per-day, 7-days-per-week basis ("**24/7**").

- iii. Revokes any physical access to Secure Areas promptly after the cessation of the need to access buildings and system(s).
- iv. Performs review of access rights on at least an annual basis.

B. Access and Authorization Processes

RingCentral maintains a documented access authorization and logging process. The authorization and logging process will include at minimum:

- i. Reports detailing all access to Secure Areas, including the identities and dates and times of access.
- ii. Reports to be maintained for at least one year as allowed by law.
- iii. Video surveillance equipment to monitor and record activity at all Secure Areas entry and exit points on a 24/7 basis to the extent permitted by applicable laws and regulations.
- iv. Video recording to be maintained for at least 30 days or per physical location provider's policies.

C. Data Centers

To the extent that RingCentral is operating or using a data center, RingCentral ensures that physical security controls are in alignment with industry standards such as ISO 27001 and SSAE 16 or ISAE 3402 or similar standard including:

- i. Perimeter security including fencing/barriers and video surveillance.
- ii. Secure access including security guard/reception.
- iii. Interior access controlled through RFID cards, 2FA, anti-tailgating controls.
- iv. Redundant utility feeds and support for continuous delivery through backup systems.
- v. Redundant network connection from multiple providers.

7. Logical Security

A. User Identification and Authentication

RingCentral:

- i. Maintains a documented user management lifecycle management process that includes manual and/or automated processes for approved account creation, account removal and account modification for all Information Resources and across all environments.
- ii. Ensures that RingCentral users have an individual accounts for unique traceability.
- iii. Ensures that RingCentral users do not use shared accounts; where shared accounts are technically required controls are in place to ensure traceability.
- iv. RingCentral user passwords are configured aligned with current NIST guidance.

For the customer facing applications, Customers may choose to integrate with SSO (Single Sign on) so that Customer retains control over their required password settings including Customer's existing MFA/2FA solutions.

B. User Authorization and Access Control

RingCentral:

- i. Configures remote access to all networks storing or transmitting Protected Data to require multi-factor authentication for such access.
- ii. Revokes access to systems and applications that contain or process Protected Data promptly after the cessation of the need to access the system(s) or application(s).
- iii. Has the capability of detecting, logging, and reporting access to the system and network or attempts to breach security of the system or network.

RingCentral employs access control mechanisms that are intended to:

- i. Limit access to Protected Data to only those Personnel who have a reasonable need to access said data to enable RingCentral to perform its obligations under the Agreement.
- ii. Prevent unauthorized access to Protected Data.
- iii. Limit access to users who have a business need to know.
- iv. Follow the principle of least privilege, allowing access to only the information and resources that are necessary.
- v. Perform review access controls on a minimum annual basis for all RingCentral's systems that transmit, process, or store Protected Data.

8. Telecommunication and Network Security

A. Network Management

RingCentral:

- i. Maintains network security program that includes industry standard firewall protection and two-factor authentication for access to RingCentral's networks.
- ii. Deploys an Intrusion Detection Systems (IDS) and/or Intrusion Prevention Systems (IPS) to generate, monitor, and respond to alerts which could indicate potential compromise of the network and/or host.
- iii. Monitors web traffic from the Internet and from internal sources to detect cyber-attacks including Distributed Denial of Service (DDoS) attacks against web sites / services and to block malicious traffic.

B. Network Segmentation

RingCentral:

- i. Implements network segmentation between the corporate enterprise network and hosting facilities for Services.
- ii. Ensures separation between environments dedicated to development, staging, and production.
- iii. Restricts access between environments to authorized devices.
- iv. Controls configuration and management of network segregation and firewall rules through a formal request and approval process.

C. Network Vulnerability Scanning

RingCentral:

- i. Runs internal and external network vulnerability scans against information processing systems at least quarterly.
- ii. Evaluates findings based on (where applicable) CVSS score and assessment of impact, likelihood, and severity.
- iii. Remediates findings following industry standard timelines.

9. Operations Security

A. Asset Management

RingCentral:

- i. Maintains an accurate and current asset register covering hardware and software assets used for the delivery of services.
- ii. Maintains accountability of assets throughout their lifecycle.
- iii. Maintains processes to wipe or physically destroy physical assets prior to their disposal.

B. Configuration Management

RingCentral:

- i. Maintains baseline configurations of information systems and applications based on industry best practices including:
 - a. Removal of all vendor-provided passwords.
 - b. Remove/disable unused services and settings.
 - c. Anti-malware/endpoint protection as technically feasible.
- ii. Enforces security configuration settings for systems used in the provision of the Services.
- iii. Ensures that clocks of all information processing systems are synchronized to one of more reference time sources.

C. Malicious Code Protection

- i. To the extent practicable, RingCentral has endpoint protection in place, in the form of Endpoint Detection and Response (EDR) and/or antivirus software, installed and running on servers and workstations.
- ii. EDR alerts are monitored, and immediate action is taken to investigate and remediate any abnormal behavior.
- iii. Where used, antivirus software will be current and running to scan for and promptly remove or quarantine viruses and other malware on Windows servers and workstations.

D. Vulnerability, Security Patching

RingCentral:

- i. Monitors for publicly disclosed vulnerabilities and exposures for impact to Supplier's information systems and products.

- ii. Ensures quality assurance testing of patches prior to deployment.
- iii. Ensures that all findings resulting from network vulnerability scanning and relevant publicly disclosed vulnerabilities and exposures are remediated according to industry best practices, including CVSS score and assessment of impact, likelihood and severity and are remediated following industry standard timelines.

E. Logging and Monitoring

RingCentral shall ensure that:

- i. All systems, devices or applications associated with the access, processing, storage, communication and/or transmission of Protected Data, generate audit logs.
- ii. Access to Protected Data is logged.
- iii. Logs include sufficient detail that they can be used to detect significant unauthorized activity.
- iv. Logs are protected against unauthorized access, modification, and deletion.
- v. Logs are sent to a centralized location for aggregation and monitoring.

10. Software Development and Maintenance

A. Secure Development Lifecycle

RingCentral:

- i. Applies secure development lifecycle practices, including, during design, development, and test cycles.
- ii. Ensures that products are subject to security design review including threat considerations and data handling practices.
- iii. Ensures that Services are subject to a secure release review prior to promotion to production.

B. Security Testing

As part of the secure development lifecycle, RingCentral:

- i. Performs rigorous security testing, including, as technically feasible:
 - a. static code analysis.
 - b. source code peer reviews.
 - c. dynamic and interactive security testing.
 - d. security logic, or security "QA" testing.
- ii. Ensures that Internet-facing applications are subject to application security assessment reviews and testing to identify common security vulnerabilities as identified by industry-recognized organizations (e.g., OWASP Top 10 Vulnerabilities, CWE/SANS Top 25 vulnerabilities).
- iii. For all mobile applications (i.e. running on Android, Blackberry, iOS, Windows Phone) that collect, transmit or display Protected Data, conducts an application security assessment review to identify and remediate industry-recognized vulnerabilities specific to mobile applications.
- iv. Does NOT use Protected Data for testing.
- v. Makes all reasonable effort to identify and remediate software vulnerabilities prior to release.

C. Annual Penetration Testing

RingCentral:

- i. Engages qualified, independent third-party penetration testers to perform annual penetration test against its Products and environments where Protected Data is hosted.
- ii. Requires sub-processors to perform similar penetration testing against their systems, environments, and networks.
- iii. Ensures remediation of all findings in a commercially reasonable period of time.

D. Product Vulnerability Management

RingCentral:

- i. Uses commercially reasonable efforts to regularly identify software security vulnerabilities in RingCentral Services.
- ii. Provides relevant updates, upgrades, and bug fixes for known software security vulnerabilities, for any software provided or in which any Protected Data is processed.

- iii. Ensures that all findings resulting from internal and external testing are evaluated according to industry best practices, including CVSS score and assessment of impact, likelihood and severity and are remediated following industry standard timelines.

E. Open Source and Third-Party Software

RingCentral:

- i. Maintains an asset registry of all third-party software (TPS) and open-source software (OSS) incorporated into the Services.
- ii. Uses commercially reasonable efforts to ensure the secure development and security of open-source software and third-party software used by RingCentral.
- iii. Uses commercially reasonable efforts to evaluate, track and remediate vulnerabilities of open-source software (OSS) and other third-party libraries that are incorporated into the Services.

11. Data Handling

A. Data Classification

RingCentral maintains data classification standards including:

- i. Public data, data that is generally available or expected to be known to the public.
- ii. Confidential data, data that is not available to the general public.

Protected Data is classified as RingCentral Confidential Data.

B. Data Segregation

RingCentral:

- i. Ensures physical or logical segregation of Protected Data from other customers' data.
- ii. Ensures physical separation and access control to segregate Protected Data from RingCentral data.

C. Encryption of Data

RingCentral:

- i. Shall ensure encryption of Protected Data in electronic form in transit over all public wired networks (e.g., Internet) and all wireless networks (excluding communication over Public Switch Telephone Networks).
- ii. Excepting the Engage Communities feature of Engage Digital, shall ensure encryption of Protected Data in electronic form when stored at rest.
- iii. Uses industry standard encryption algorithms and key strengths to encrypt Protected Data in transit over all public wired networks (e.g., Internet) and all wireless networks.

D. Destruction of Data

RingCentral shall:

- i. Ensure the secure deletion of data when it is no longer required.
- ii. Ensure that electronic media that has been used in the delivery of Services to the Customer will be sanitized before disposal or repurposing, using a process that assures data deletion and prevents data from being reconstructed or read.
- iii. Destroy any equipment containing Protected Data that is damaged or non-functional.

12. Incident Response

RingCentral's incident response capability is designed to comply with statutory and regulatory obligations governing incident response. As such, RingCentral:

- A.** Maintains an incident response capability to respond to events potentially impacting the confidentiality, integrity and/or availability of Services and/or data including Protected Data.
- B.** Has a documented incident response plan based on industry best practices.
- C.** Has a process for evidence handling that safeguards the integrity of evidence collected to including allowing detection of unauthorized access to.
- D.** Will take appropriate steps and measures to comply with statutory and regulatory obligations governing incident response.

When RingCentral learns of or discovers a security event which impacts Protected Data, RingCentral will notify Customer without undue delay and will take commercially reasonable steps to isolate, mitigate, and/or remediate such event.

13. Business Continuity and Disaster Recovery

A. Business Continuity

RingCentral:

- i. Ensures that responsibilities for service continuity are clearly defined and documented and have been allocated to an individual with sufficient authority.
- ii. Has a business continuity plan (BCP) in place designed to provide ongoing provision of the Services to Customer.
- iii. Develops, implements, and maintains a business continuity management program to address the needs of the business and Services provided to the Customer. To that end, RingCentral completes a minimum level of business impact analysis, crisis management, business continuity, and disaster recovery planning.
- iv. Ensures that the scope of the BCP encompasses all relevant locations, personnel and information systems used to provide the Services.
- v. Ensure that its BCP includes, but is not limited to, elements such location workarounds, application workarounds, vendor workarounds, and staffing workarounds, exercised at minimum annually.
- vi. Reviews, updates, and tests the BCP at least annually.

B. Disaster Recovery

RingCentral:

- i. Maintains a disaster recovery plan, which includes, but is not limited to, infrastructure, technology, and system(s) details, recovery activities, and identifies the people/teams required for such recovery, exercised at least annually.
- ii. Ensures that the disaster recovery plan addresses actions that RingCentral will take in the event of an extended outage of service.
- iii. Ensures that its plans address the actions and resources required to provide for (i) the continuous operation of RingCentral, and (ii) in the event of an interruption, the recovery of the functions required to enable RingCentral to provide the Services, including required systems, hardware, software, resources, personnel, and data supporting these functions.

**Attachment F
Additional Insurance**

I. At RingCentral's sole expense, RingCentral 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. **NETWORK SECURITY & PRIVACY LIABILITY (CYBER)**

\$1,000,000	Claims Made
\$3,000,000	Aggregate Limit

RingCentral 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. RingCentral'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, RingCentral shall provide a Certificate of Insurance in satisfactory form as evidence of the insurances required above.

C. RingCentral 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 RingCentral 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 RingCentral's personal property whether insured or not insured. Any deductible or self-insured retention is the sole responsibility of RingCentral.

F. Notwithstanding the notification requirements of the Insurer, RingCentral 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:	<u>Information Technology</u>
Contract #:	<u>9983</u>

H. Insurance procured by RingCentral shall not reduce nor limit RingCentral'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 RingCentral 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. 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. RingCentral shall ensure that RingCentral 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 RingCentral.

IV. Notwithstanding anything in the Agreement to the contrary, RingCentral acknowledges that Union County is subject to Chapter 132 of the North Carolina General Statutes, the Public Records Act, and that this Agreement, 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 RingCentral of the request and of the date that any responsive documents will be released to the requester unless RingCentral obtains a court order enjoining that disclosure. If RingCentral fails to obtain the court order enjoining disclosure, Union County will release the requested information on the date specified.

ATTACHMENT G
RINGCENTRAL BUSINESS ASSOCIATE AGREEMENT

RingCentral and Customer hereby agree to the following terms and conditions of this Business Associate Agreement (this “**BAA**”), pursuant to the RingCentral Master Services Agreement (the “**Agreement**”) and is effective as of the execution date of the Agreement. RingCentral and Customer may be individually referred to as a “**Party**” and collectively the “**Parties**”.

RECITALS

Whereas, Customer has, pursuant to the Agreement, purchased one or more services covered by this BAA listed in Annex A (the “**Services**”).

Whereas, Customer desires to comply with the Health Insurance Portability and Accountability Act of 1996 (“**HIPAA**”), as amended, along with applicable provisions of the Standards for Privacy of Individually Identifiable Health Information (the “**Privacy Rule**”) and applicable provisions of the Security Standards for the Protection of Electronic Protected Health Information (“**Security Rule**”) (collectively the “**HIPAA Rules**”) and, in compliance with the HIPAA Rules, Customer desires to safeguard Customer’s Protected Health Information (“**PHI**”) created, transmitted, received, or maintained by Customer using the Customer’s Account (“**Account**”).

Whereas, as a business associate (as that term is defined in the HIPAA Rules) RingCentral wishes to accommodate Customer’s desire to safeguard PHI that Customer creates, receives, transmits, or maintains using the RingCentral Services, by entering into this BAA, which meets the requirements of 45 C.F.R. §§ 164.314(a) and 164.504(e).

Now, therefore, in consideration of the mutual covenants and representations, and for good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties agree as follows:

AGREEMENT

1. Obligations of RingCentral. RingCentral agrees:

- A.** Subject to the provisions of Section 2, to use and disclose Customer’s PHI only in connection with the provision of the Services purchased by Customer as part of or related to Customer’s Account(s), as required by law, or for any other purpose permitted by the Agreement, or this BAA, provided that RingCentral may not use or disclose Customer’s PHI in a manner that would violate the requirements of subpart E of 45 C.F.R. Part 164 if done by Customer.
- B.** Not to use or further disclose Customer’s PHI other than as permitted or required by this BAA, or as required by law.
- C.** Where required by the HIPAA Rules, to make reasonable efforts to use, disclose, and request only the minimum necessary amount of PHI.
- D.** To use appropriate safeguards and comply, where applicable, with subpart C of 45 C.F.R. Part 164 with respect to the protection of Electronic PHI, to prevent use or disclosure of Customer’s PHI other than as provided for by this BAA.
- E.** To report to Customer any use or disclosure of Customer’s PHI not provided for by this BAA of which RingCentral becomes aware, including any breach of unsecured PHI as required by 45 C.F.R. § 164.410, and any security incident involving Customer’s PHI of which RingCentral becomes aware; provided, however, that notwithstanding the foregoing, the Parties agree that this BAA serves as notification, and that no further notification is required, of the ongoing existence of Unsuccessful Security Incidents. RingCentral shall report any security incident or breach without unreasonable delay and in no case later than the following: initially reported 72 hours of when RingCentral becomes aware of the event. The notification shall include the information required by applicable law, including, but not limited to 45 C.F.R. § 164.410 and Section 13402 of the Health Information Technology for Economic and Clinical Health (HITECH) Act. For purposes of this BAA, an “**Unsuccessful Security Incident**” includes, without limitation, activity such as pings and other broadcast attacks on RingCentral’s firewall, port scans, unsuccessful log-on attempts, denials of service, and any combination of the above, so long as such activity does not result in unauthorized access, use, acquisition, or disclosure of Customer’s PHI. As used by this subsection, the phrase “becomes aware” shall mean the first day on which a breach, security incident or other use or disclosure is known to RingCentral to have occurred.
- F.** To ensure that any subcontractor that creates, receives, maintains or transmits Customer’s PHI on behalf of RingCentral agrees to substantially the same restrictions and conditions that apply to RingCentral with respect to such PHI, as required by the HIPAA Rules.
- G.** To the extent that RingCentral has been delegated under the Agreement and is to carry out an obligation of Customer under Subpart E of 45 C.F.R. Part 164, RingCentral will comply with the requirement(s) of Subpart E of 45 C.F.R. Part 164 that apply to Customer in the performance of such delegated obligation.
- H.** To the extent that: (i) Customer provides advanced written notice to RingCentral that RingCentral will maintain PHI in a “**Designated Record Set**” as defined in the HIPAA Rules (and with the understanding that the Parties do not intend for RingCentral to maintain PHI in a Designated Record Set); and (ii) the Designated Record Set (if any) maintained by RingCentral is not duplicative of records maintained by Customer; RingCentral agrees to:
 - i.** upon receipt of a written request from Customer, make available to Customer to inspect and/or obtain a copy of Customer’s PHI maintained by RingCentral in a Designated Record Set, as required under 45 C.F.R. § 164.524, for so long as RingCentral maintains such PHI in a Designated Record Set.

- ii. upon receipt of a written request from Customer, provide such information to Customer for amendment and incorporate amendments to PHI maintained by RingCentral in a Designated Record Set as agreed to by Customer under 45 C.F.R. § 164.526, for so long as RingCentral maintains such PHI in a Designated Record Set.
 - I. To the extent no disclosure exceptions apply under 45 C.F.R. § 164.528, to maintain and to make available to Customer the information required for Customer to provide an accounting of disclosures in accordance with 45 C.F.R. § 164.528.
 - J. In the event any individual delivers directly to RingCentral a request for an amendment to PHI, access to PHI, or an accounting of disclosures of PHI, to promptly forward such individual request to Customer.
 - K. To make its internal practices, books, and records relating to the Use and Disclosure of Customer's PHI available to the Secretary (as defined in the HIPAA Rules) for purposes of determining Customer's compliance with 45 C.F.R. Part 164, Subpart E.
 - L. Upon termination of this BAA for any reason, if feasible, to return or destroy all PHI received from Customer, or created or received by RingCentral on behalf of Customer, in connection with this BAA, to the extent it has not been already erased, returned or destroyed, and retain no copies thereof, or, if in RingCentral's opinion such return or destruction is not feasible, to extend the protections of this BAA to the PHI and limit further uses and disclosures to those purposes that make the return or destruction of the PHI infeasible.
- 2. Permitted Uses and Disclosures of PHI.** Notwithstanding the other provisions of this BAA, RingCentral is permitted to use or disclose Customer's PHI for its proper management and administration of RingCentral services or to carry out its legal responsibilities, provided that RingCentral may only disclose PHI for such purposes if: (i) the disclosure is required by law or (ii) RingCentral obtains reasonable assurances from the person to whom the PHI is disclosed that the information 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 RingCentral when the confidentiality of the PHI has been breached.
- 3. Obligations of Customer.**
- Customer will:
- A. As between the Parties, assume sole responsibility for obtaining any consent, authorization, or permission that may be required by the HIPAA Rules, or any other applicable laws or regulations prior to using the Services to create, receive, maintain, or transmit PHI, or otherwise provide PHI to RingCentral. Without limiting the foregoing, in the event Customer transmits PHI via text message, or any other method of electronic transmission of PHI (including email or any attachment to email) as part of the Services, Customer agrees to notify the patient whose PHI is to be transmitted that such transmission is not secure and to obtain such individual's consent or authorization, consistent with applicable law, before transmitting any such PHI.
 - B. Use, disclose, request, and otherwise provide to RingCentral and RingCentral employees only the minimum amount of PHI necessary for RingCentral to provide Services.
 - C. Notify RingCentral, in writing, of any limitation(s) in Customer's notice of privacy practices that may affect RingCentral's Use or Disclosure of Customer's PHI.
 - D. Notify RingCentral, in writing, of any changes in, or revocation of, permission by an individual to use or disclose any of his or her PHI, to the extent that such changes may affect RingCentral's Use or Disclosure of Customer's PHI.
 - E. Notify RingCentral, in writing, of any restriction on the use or disclosure of PHI that Customer has agreed to in accordance with 45 C.F.R. §164.522, to the extent that such restriction may affect RingCentral's use or disclosure of Customer's PHI.
 - F. Not request that RingCentral use or disclose Customer's PHI in a manner that would not be permissible under the HIPAA Rules if done by Customer.
- 4. Effect of Limitations and Restrictions.** The Parties agree that in the event RingCentral reasonably believes that any limitation(s) or restriction(s) on the use or disclosure of PHI disclosed by Customer pursuant to Section 3 may materially impair RingCentral's ability to provide Services or materially affect RingCentral's costs of providing Services, the Parties will promptly and in good faith negotiate an amendment to the Agreement that is necessary to adjust RingCentral's obligations and/or reflect RingCentral's increased costs. In the event such negotiations are unsuccessful, RingCentral may terminate this BAA and the Agreement without penalty or further obligation to RingCentral.
- 5. Customer Integrations**
- A. Notwithstanding any discussion or any provision to the contrary in any agreement between the Parties, this BAA applies only to Services offered by RingCentral as described in Annex A.
 - B. Pursuant to the limitations contained in the Agreement between the Parties and applicable RingCentral policies, Customer may choose to, at its own risk, use third party or Customer's own applications, services, devices, APIs, or any other technology (whether utilized by Customer or a third party on behalf of Customer and whether implemented by RingCentral or by Customer or by a third party) which integrate with the Services or that transfer data to or from the Services, including third-party communication channel used to receive or send messages (e.g. Instagram, Twitter, Email, etc.) ("**Customer Integrations**").
 - C. Customer understands and agrees that Customer Integrations are outside the scope of the Agreement and of this Business Associate Agreement.
 - D. Notwithstanding any provision to the contrary in any agreement between the Parties, RingCentral has no responsibility or liability

for, and expressly disclaims any warranties or representations relating to, any Customer Integrations.

- E. For the avoidance of doubt, RingCentral will have no obligations or liability for the privacy, security, confidentiality, availability, or integrity of any Customer Integrations, or any PHI or other data processed, created, sent, received, handled, stored, maintained, or transmitted in connection with any Customer Integrations or through any applications, services, devices, APIs, or any other technology not provided within RingCentral Services.

- 6. **Term.** The term of this BAA (the “**BAA Term**”) commences on the BAA Effective Date and runs conterminously with the term of the Agreement, unless sooner terminated by either Party in accordance with Section 7.

7. Termination

- A. **Automatic BAA Termination.** Termination or expiration of the Agreement for any reason will result in the termination of this BAA.
- B. **Direct BAA Termination.** In the event that either Party violates a material term of this BAA, the other Party may terminate the BAA, provided that the non-breaching Party provides written notice to the breaching Party of such breach and provides the breaching Party with an opportunity to cure the breach or end the violation. If such violation is not cured within thirty (30) days, the non-breaching Party may terminate this BAA. In the event that the BAA is terminated pursuant to this section, either Party may terminate the Agreement.

8. Miscellaneous

- A. **Definitions.** All capitalized terms used herein but not otherwise defined have the meanings ascribed to them in the Agreement. Subject to the immediately foregoing sentence, any other terms that are not defined in this BAA or the Agreement but that are defined under the HIPAA Rules have the same meaning as defined under the HIPAA Rules. For purposes of this BAA, “**PHI**” means “protected health information” as that term is defined in the HIPAA Rules, limited to such information created, received, maintained, or transmitted by RingCentral for or on behalf of Customer.
- B. **No Third-Party Beneficiaries.** Nothing in this BAA, express or implied, is intended to confer or will confer upon any person or entity other than the Parties any right, benefit, or remedy as a third-party beneficiary or by any other nature whatsoever under or by reason of this BAA.
- C. **Notices.** All notices or other communications to be given under this BAA are deemed given when emailed.
 - To Customer:** The postal and email address on file at the time of notice for an Account
 - To RingCentral:** RingCentral, Inc.
Attn.: Legal Department
20 Davis Drive
Belmont, California 94002
HIPAA@ringcentral.com
- D. **Modification.** No modification or amendment of this BAA will be effective unless set forth in a document specifically referencing this BAA that is executed by both Parties.
- E. **Counterparts.** This BAA may be executed in any number of counterparts, each of which will be deemed an original, but all of which together will constitute one and the same instrument.
- F. **Entire Agreement.** RingCentral will be bound by the terms of this BAA only to the extent that: (i) Customer is a “**Covered Entity**” or “**Business Associate**” (as these terms are defined in the HIPAA Rules) pursuant to HIPAA; and (ii) RingCentral is acting as Customer’s “**Business Associate**” (as that term is defined in the HIPAA Rules) pursuant to HIPAA. This BAA, together with the Agreement, states the entire understanding and agreement between the Parties with respect to the subject matter hereof, and supersedes and replaces all prior and contemporaneous understandings or agreements, written or oral, regarding such subject matter.

ANNEX A
LIST OF RINGCENTRAL SERVICES COVERED BY THIS BAA

If purchased, the following Services are covered by this BAA:

- RingEX
- RingCentral AI Receptionist
- Avaya Cloud Office
- Unify Cloud Office
- Rainbow Cloud Office
- RingCentral Contact Center
- RingCentral Video Pro
- Unify Video
- RingCentral Engage Voice
- RingCX
- RingCentral Engage Digital (third party channel communications excluded)
- RingSense for Sales
- RingSense for CX



Union County, NC

Staff Report

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

File #: 25-708

Agenda Date: 11/17/2025

TITLE:

Minutes for Approval

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve minutes

PRIOR BOARD ACTIONS:

None

BACKGROUND:

Draft minutes have been sent to Commissioners for review and approval

FINANCIAL IMPACT:

None



Union County, NC

Staff Report

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

File #: 25-691

Agenda Date: 11/17/2025

TITLE:

Union EMS Quarterly Financial Statements

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union EMS provides unaudited quarterly reports and an annual audited financial report to the County as required by contract terms.

FINANCIAL IMPACT:

None.



Union Emergency Medical Services

October 23, 2025

Mr. Brian Matthews, County Manager
Union County
500 North Main St., Suite 901
Monroe N.C. 28112

Mr. Matthews,

In accordance with the Union EMS agreement, enclosed are the unaudited financial statements and the detailed schedules on receivables and liabilities for the period ending September 30, 2025. Please keep in mind when reviewing these statements and schedules that they are prepared on a modified accrual basis. Therefore, there will be timing difference from this basis as compared to a cash basis.

If you have any questions, please contact me at tina.hampton@atriumhealth.org.

Sincerely,

Tina Hampton

Tina Hampton
Director, Financial Services, Atrium Health

CC: Denise White, VP, Facility Executive & Chief Nurse Executive, Atrium Health
Kim LaPointe, Area VP Financial Operations NSW Charlotte
David Hyatt, Director, EMS
Beverly Liles, Finance Director
Blake Hart, Budget Director
Patrick Niland, Assistant County Manager

Union Emergency Medical Services

QUARTERLY UNAUDITED FINANCIAL REPORTS

AS OF SEPTEMBER 30, 2025

PAGE

1. UNAUDITED STATEMENTS OF ASSETS AND LIABILITIES
2. UNAUDITED COMPARATIVE STATEMENTS OF OPERATIONS
3. UNAUDITED STATEMENTS OF SOURCES AND USES OF CASH
4. ACCOUNT RECEIVABLE AND ACCOUNTS PAYABLE ANALYSIS
5. SCHEDULE OF EXCESS CASH AVAILABLE

UNION EMERGENCY MEDICAL SERVICES
Statements of Assets and Liabilities
September 30, 2025

ASSETS

	September 2025	June 2025	\$ CHANGE
CURRENT ASSETS			
Cash and cash equivalents	9,349,934	5,727,978	\$3,621,956
Patient accounts receivable - net	1,604,870	1,676,836	(\$71,966)
Other accounts receivable	41,377	14,858	\$26,519
Prepaid expenses	120,449	-	\$120,449
	<u>11,116,630</u>	<u>7,419,672</u>	<u>3,696,958</u>
TOTAL CURRENT ASSETS			
	<u>11,116,630</u>	<u>7,419,672</u>	<u>\$3,696,958</u>
TOTAL ASSETS	<u>\$11,116,630</u>	<u>\$7,419,672</u>	<u>\$3,696,958</u>

LIABILITIES AND FUND BALANCE

CURRENT LIABILITIES			
Accounts payable	\$3,111,310	\$2,411,102	\$700,208
Salaries and Wages Payable	1,361,446	995,009	\$366,437
Curr Port LTD - Notes Payable	-	74,314	(74,314)
Other liabilities and accruals	11,689	57,618	(\$45,929)
Deferred revenue	2,528,889	-	\$2,528,889
	<u>7,013,334</u>	<u>3,538,043</u>	<u>3,475,291</u>
TOTAL CURRENT LIABILITIES			
	<u>7,013,334</u>	<u>3,538,043</u>	<u>3,475,291</u>
FUND BALANCE			
Unrestricted	3,603,296	3,381,629	221,667
Restricted	500,000	500,000	-
	<u>4,103,296</u>	<u>3,881,629</u>	<u>221,667</u>
TOTAL FUND BALANCE			
	<u>4,103,296</u>	<u>3,881,629</u>	<u>221,667</u>
TOTAL LIABILITIES AND FUND BALANCE	<u>\$11,116,630</u>	<u>\$7,419,672</u>	<u>\$3,696,958</u>

These statements are prepared on a modified accrual basis and not prepared in accordance with GAAP.

UNION EMERGENCY MEDICAL SERVICES
COMPARATIVE STATEMENTS OF OPERATIONS
For the Month and Year to Date Ended September 30, 2025

CURRENT MONTH			YEAR-TO-DATE			
ACTUAL	BUDGET	% CHANGE		ACTUAL	BUDGET	% CHANGE
OPERATIONS						
OPERATING REVENUE						
\$465,162	\$355,707	31%	Basic Life Support Revenue	\$1,365,035	\$1,067,121	28%
543,375	598,601	-9%	Advanced Life Support Revenue	1,566,919	1,795,803	-13%
780	801	-3%	Other Patient Revenue	1,880	2,403	-22%
183,645	166,090	11%	Mileage Revenue	530,869	498,270	7%
1,192,962	1,121,199	6%	TOTAL PATIENT REVENUE	3,464,703	3,363,597	3%
607,613	493,317	23%	TOTAL REVENUE DEDUCTIONS	1,578,018	1,479,950	7%
585,349	627,882	-7%	NET PATIENT REVENUE	1,886,685	1,883,647	0%
842,963	842,963	0%	County Funding Revenue	2,528,889	2,528,889	0%
6,131	2,935	109%	OTHER OPERATING REVENUE	11,944	8,805	36%
1,434,443	1,473,780	-3%	TOTAL OPERATING REVENUE	4,427,518	4,421,341	0%
OPERATING EXPENSES						
848,474	857,129	-1%	Salaries & Wages	2,481,690	2,571,387	-3%
210,639	293,436	-28%	Benefits	710,101	880,308	-19%
1,059,113	1,150,565	-8%	TOTAL PERSONNEL	3,191,791	3,451,695	-8%
100,535	64,921	55%	Supplies	266,258	194,763	37%
46,187	39,590	17%	Professional Fees	128,982	118,770	9%
4,885	44,600	-89%	Purchased Services	195,967	133,801	46%
40,150	37,290	8%	Insurance	120,449	111,870	8%
4,982	3,413	46%	Utilities	17,566	10,239	72%
114,612	133,401	-14%	Other Operating Expense	335,374	400,203	-16%
1,370,464	1,473,780	-7%	TOTAL OPERATING EXPENSES	4,256,387	4,421,341	-4%
63,979	-	-100%	RESULTS OF OPERATIONS	171,131	-	100%
NON-OPERATING REVENUE (EXPENSE)						
7,098	-	100%	Interest Income	16,577	-	100%
-	-	0%	Interest Expense	(1,931)	-	-100%
7,098	-	100%	TOTAL NON-OPERATING REVENUE (EXPENSE)	14,646	-	100%
CAPITAL						
REVENUE						
-	44,410	-100%	County Funding	-	133,230	-100%
EXPENSES						
35,890	-	100%	Proceeds from Sale/Disposal of Fixed Assets	35,890	-	100%
-	-	0%	Equipment	-	-	0%
-	(44,410)	-100%	Vehicles	-	(133,230)	-100%
35,890	(44,410)	-181%	Capital Expenses Total	35,890	(133,230)	-127%
35,890	-	100%	TOTAL CAPITAL MARGIN	35,890	-	100%
TOTAL MARGIN						
106,967	-	100%	TOTAL MARGIN	\$221,667	-	100%
STATISTICS						
1,585	1,480	7%	TRIPS	4,628	4,440	4%

These statements are prepared on a modified accrual basis and not prepared in accordance with GAAP.

UNION EMERGENCY MEDICAL SERVICES

Statements of Sources and Uses of Cash For the Year to Date Ended September 30, 2025

	<u>Y-T-D FY 2026</u>
CASH FLOWS FROM OPERATING ACTIVITIES	
Cash Received from Patients	2,077,668
Cash Received from Union County	5,057,779
Cash Paid for Goods and Services	(1,204,664)
Cash Paid to Employees for Services	(2,285,876)
Net Cash Provided by Operating Activities	<u>3,644,907</u>
CASH FLOWS FROM CAPITAL AND RELATING FINANCING ACTIVITIES	
Purchases of Property and Equipment	-
Proceeds/(Payments) from Notes Payable	(74,314)
Proceeds for Sale of Fixed Assets	35,890
Net Cash Used in Capital and Related Financing Activities	<u>(38,424)</u>
CASH FLOWS FROM INVESTING ACTIVITIES	
Interest Income	17,404
Interest Expense	(1,931)
Net Cash Provided by Investing Activities	<u>15,473</u>
NET INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS	3,621,956
Cash and Equivalents at Beginning of Year	<u>5,727,978</u>
CASH AND CASH EQUIVALENTS - September 30, 2025	<u><u>9,349,934</u></u>
RECONCILIATION OF OPERATING INCOME TO NET CASH PROVIDED BY OPERATING ACTIVITIES	
Operating Income	\$171,131
Adjustments to Reconcile Operating Income to Cash Provided by Operating Activities:	
(Increase) Decrease in Patient Account Receivable, Net	71,966
Change in Other Operating Assets and Liabilities	<u>3,401,810</u>
Net Cash Provided by Operating Activities	<u><u>3,644,907</u></u>

These statements are prepared on a modified accrual basis and not prepared in accordance with GAAP.

Union Emergency Medical Services

SEPTEMBER 2025

Quarterly Report on Receivables

Gross Patient A/R
Other A/R

Total Receivables
Allowance
Net Receivables

Aging of Receivables					
0-30	31-60	61-90	91-120	over 120	Total
\$1,427,869	\$527,852	\$396,232	\$225,475	\$1,302,956	\$3,880,384
\$41,380	\$0	\$0	\$0	\$0	\$41,380
\$1,469,249	\$527,852	\$396,232	\$225,475	\$1,302,956	\$3,921,764
					(\$2,275,517)
					\$1,646,247

Collection Rates

	Total Billed	Total adjusted Collection Rate
Quarter Ending September 2025	\$3,464,703	58%
Quarter Ending December 2025	\$0	0%
Quarter Ending March 2026	\$0	0%
Quarter Ending June 2026	\$0	0%
Fiscal Year to Date	\$3,464,703	58%

Quarterly Report on Payables

Vendor Payables

Accrued Payables

Current Portion of Notes Payable

Other Liabilities

Total Liabilities

Aging of Payables					
0-30	31-60	61-90	91-120	over 120	Total
\$3,111,310	\$0	\$0	\$0	\$0	\$3,111,310
\$1,361,446	\$0	\$0	\$0	\$0	\$1,361,446
\$0	\$0	\$0	\$0	\$0	\$0
\$11,689	\$0	\$0	\$0	\$0	\$11,689
\$4,484,445	\$0	\$0	\$0	\$0	\$4,484,445

UNION EMS
EXCESS CASH AVAILABLE
For the Month and Year to Date Ended September 30, 2025

Cash & Cash Equivalents	<u>\$9,349,934</u>
Less:	
Accounts Payable	3,111,310
Salaries & Wages Payable	1,361,446
Other Liabilities & Accruals	11,689
Deferred Revenue	<u>2,528,889</u>
 TOTAL LIABILITIES	 <u>7,013,334</u>
 Net Cash from Operations	 <u>\$2,336,600</u>
 Less: Restricted Fund Balance	 500,000
 Excess Cash Available Before Capital Committed	 <u>\$1,836,600</u>
 2025/2026 Capital Requests:	
Included in Budget	\$532,918
REMAINDER Approved from Excess Funds	
 BUDGETED CAPITAL:	
Ambulance - New Builds (Chassis Included) (1)	(\$385,375)
Ambulance Remounts (4)	(\$739,668)
Ambulance Chassis (7)	(\$609,875)
Support Vehicle Scheduled Rotation (2)	(\$132,000)
 EXCESS CASH AVAILABLE	 <u><u>\$502,600</u></u>



Union County, NC

Staff Report

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

File #: 25-704

Agenda Date: 11/17/2025

TITLE:

Communications Monthly Report - October 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

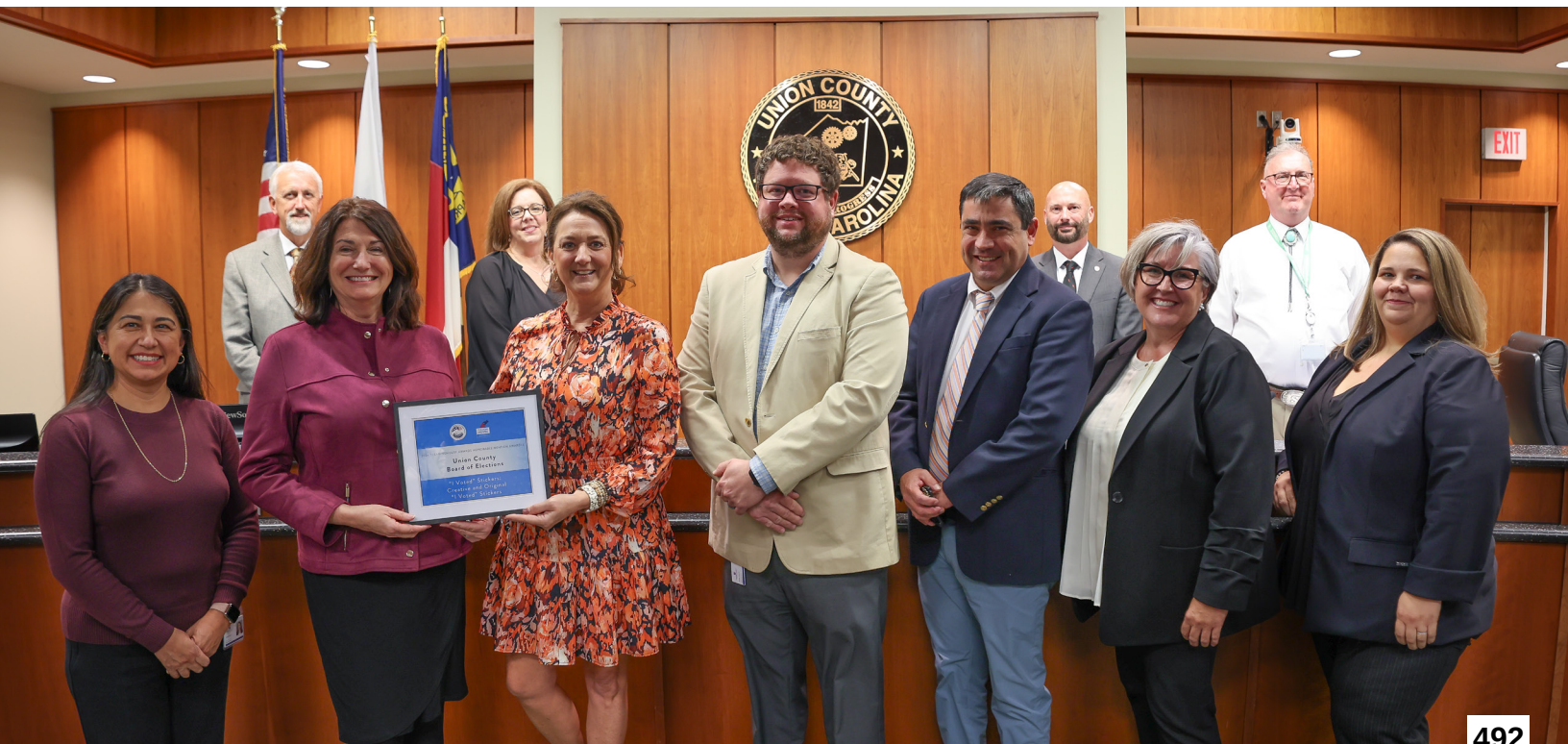
FINANCIAL IMPACT:

None.



Communications Monthly Report

October 2025



Top Projects

1

Community Planning Month

To recognize Community Planning Month, we launched a new video series highlighting the importance of planning and zoning in shaping our community. The videos, shared on social media and the County website, address common questions and help residents better understand how planning decisions impact daily life. The series received positive engagement and will serve as an ongoing educational resource.



2

Career Fair

Public Communications partnered with Human Resources to promote the County's recent Career Fair, which highlighted employment opportunities across multiple departments. Efforts included media outreach, targeted social media advertising, water bill insert, roadside banners, and more. The campaign successfully generated strong community interest, resulting in approximately 130 attendees at the event.



3

Fire Prevention Month

This campaign focused on lithium-ion battery safety and general fire prevention tips. Messaging approved by the Fire Marshal's Office was shared on social media and the Union County Horizon e-newsletter. The campaign also incorporated seasonal reminders for Halloween safety.



Celebrate
Safely



91 Projects
Completed



21 Departments
Supported

Website



Top Search Terms

- 1 Summons
- 2 Inmate
- 3 Inmate Search
- 4 Arrest
- 5 Passport

Top Webpages

- 1 Water Portal
- 2 GIS & Mapping
- 3 Taxes & Property

Website Visits

unioncountync.gov

379,688



Sprout Automated Webchat

540 Residents Engaged

759 Total Communications Per Month

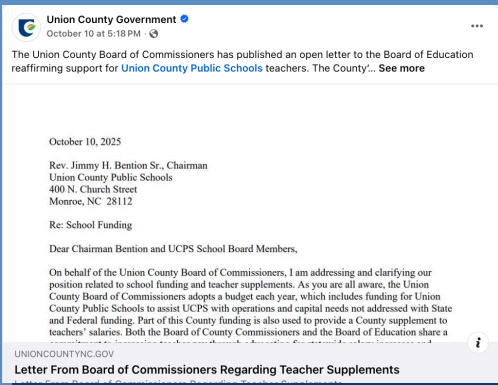
Social Media



42,765
Total Followers



Top Posts



Facebook

20.1 % Engagement Rate
32,932 Reach



LinkedIn

5.2% Engagement Rate
2,985 Impressions

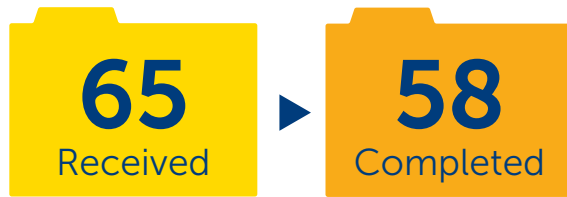


Instagram

1.6 Engagement Rate
1,607 Impressions

Engagement rate is calculated by dividing the total number of interactions on a post (likes, comments, shares, clicks) by the total number of impressions that post received, then multiplying by 100 to get a percentage. **Impressions** are the number of times a user sees a post. **Reach** refers to the total number of individuals who saw a specific post on social media.

Public Records Requests



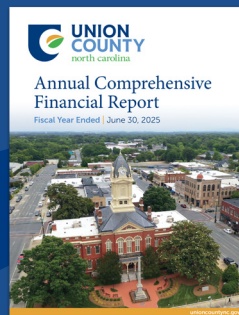
Media Interactions



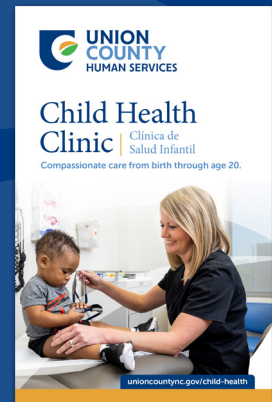
Creative Highlights



Sr. Budget Management Analyst
Position Flyer



Annual Comprehensive
Financial Report

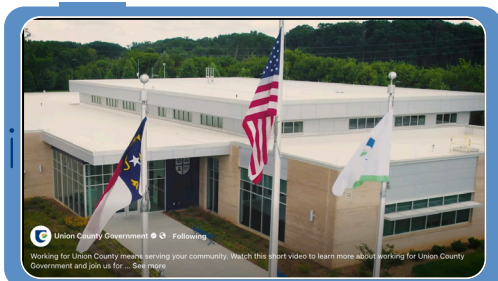


Child Health Clinic Brochure

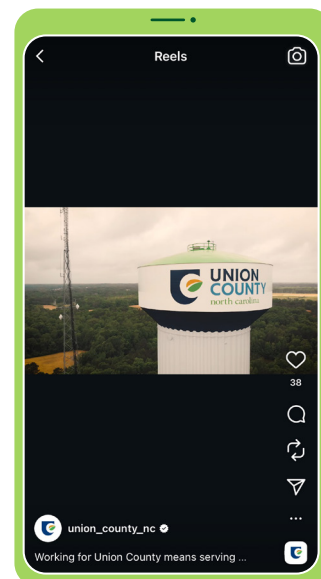
Video Engagement



YouTube
Unwrapping Joy: Christmas
Bureau Volunteers
111 Views
2.5 Hours Watch Time



Facebook
Working for
Union County means
serving your community
2,982 Views



Instagram
Working for Union County
means serving your
community
848 Views