

Union County, NC

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



Meeting Agenda

Tuesday, January 21, 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

Closed Session - 5:15 PM

25-032

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)(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 Gary Sides recognizes Pastor Chris Justice, Lee Park Baptist Church, Monroe, NC, for the Invocation

Pledge of Allegiance

Informal Comments

Public Hearing(s)

Consent Agenda

25-023

Task Order - Twelve Mile Creek WRF Chemical Sampling and Evaluation

INFORMATION CONTACT:

Christopher Clark, UC Water - Water & Wastewater Operations, Director, 704-296-4215

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Water owns and operates the Twelve Mile Creek WRF. This facility has a strict phosphorus limitation which requires chemical

addition to aid in meeting this requirement. This task order is intended to facilitate a study to determine the best chemicals to use to optimize treatment plant operations during and after the 9.0 MGD expansion.

Hazen and Sawyer, P.C. has been selected to provide engineering services for task order #7364-5. Hazen and Sawyer, P.C. was chosen from a list of vendors previously selected from 2022-008 Engineering Services for Twelve Mile Creek WRF Expansion to 9.0 MGD to provide these services for Union County projects.

FINANCIAL IMPACT:

The total cost of the contract with Hazen and Sawyer, P.C. is \$68,140.00. Sufficient funds are available in Capital Account WRF Operations Budget - 60026710-5381.

25-014

Contract - Transportation Propane Pump and Fueling System

INFORMATION CONTACT:

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

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:

On October 21, 2024, the Procurement Department partnered with The Human Services Transportation Department to issue an Invitation for Bid 2025-012 Transportation Propane Pump and Fueling System. On November 12, 2024, four bids for the title project were received and processed. After review, three (3) bids were deemed non-responsive and not subject to award. Blossman Gas of North Carolina's bid, in the amount of \$35,976.00, was tabulated and certified by the Transportation Department. Staff recommends that the project be awarded to the lowest responsive, responsible bidder, Blossman Gas of North Carolina, Inc.

FINANCIAL IMPACT:

The anticipated annual cost for the service is \$35,976.00. Since this contract has an initial term of two (2) years, with three one-year renewal options, a total of \$179,880.00 is estimated to be spent. Funding is available in the FY2025 budget, with future expenditures subject to annual BOCC budget appropriation.

25-013

November 2024 NCVTS Motor Vehicle Tax Report

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve the November 2024 NCVTS Motor Vehicle Tax Refund Report.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

\$2,751.82

25-017**FY2024-25 Tax Bill Correction Report for December 2024****INFORMATION CONTACT:**

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

ACTION REQUESTED:

Approve FY 2024-25 Tax Bill Correction Reports for December 2024.

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:

December Refund amount = \$398.07

25-021**Contract Amendment - Additional Design Services for BARN Project****INFORMATION CONTACT:**

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

January 16, 2024, Regular Meeting, Agenda Item 24-045 - Approved Design Contract with CPL Architects & Engineers, PC

BACKGROUND:

CPL Architects & Engineers, PC has been delivering design services for the BARN project since March 2024. During the design process, several changes in original scope have occurred that warrant consideration of a design fee adjustment. The additional scope includes a change from a pre-engineered structure to typical steel and masonry structure, additional food service programming and space planning, more extensive food equipment pricing efforts, additional conceptual design options and site development items like loading docks, gray water stations and screen walls. The original design fee was \$600,250.00. The cost of this amendment is \$185,070.00 bringing the revised total fee to \$785,320.00. Staff recommends approval of this contract amendment to provide additional design services as needed for the project.

FINANCIAL IMPACT:

The cost for this amendment is \$185,070.00. There are sufficient funds in the BARN Project capital account, 40080187, to cover this expense.

25-022**Task Order - Architectural Services for Government/Judicial Center Building Envelope Repairs Project****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:

This request is to approve Task Order #2023-070-01 for Gensler Architecture, Design & Planning, P.C. to provide architectural services for the Government/Judicial Center Building Envelope Repairs project. The project is anticipated to include exterior building envelope repairs at the Government Center including caulking, glazing, tuck-pointing, sealing, partial window or glass replacement, flashing and other waterproofing items. The scope of work was determined through a study conducted in 2022 that identified the highest priority items, some of which have been completed previously. This scope will address the next highest priority level items identified for the Government Center in the exterior envelope study. The architect will provide all construction documents, bidding assistance and construction administration. The projected construction budget for the project is \$650,000.00.

Gensler Architecture, Design & Planning, P.C. was selected as one of the County's On-Call Architectural Design teams for various capital projects.

Staff has negotiated a scope and fee for the services for this project and recommends approval of task order 2023-070-02 in the amount of \$71,082.00.

FINANCIAL IMPACT:

The cost of the services provided within this task order is \$71,082.00 and there are sufficient funds in the Government/Judicial Center Building Envelope Repairs capital account, 40080123, to cover the expense.

25-024

Amendment to the Union County Pay and Classification Plan

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve a revision of the Union County Pay Plan to include new job classification titles and pay grades.

1) Add the following classifications and associated pay grades:

- a. Applications Supervisor - pay grade O
- b. Applications Administrator - pay grade N

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Updates to the Union County Pay Plan are necessary to add, update, and remove job classification titles to align with current and future organizational needs.

FINANCIAL IMPACT:

No additional funds required.

24-885

Minutes for Approval

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve minutes of regular meeting of January 6, 2025

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Draft minutes have been provided to the Board for review and approval on the January 21, 2025, consent agenda.

FINANCIAL IMPACT:

None.

Information Only

25-007

FY2024 Popular Annual Financial Report

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Popular Annual Financial Reports provides a condensed version of the County's financial statements and represents the highlights of the financial status of the County.

The FY 2024 Popular Annual Financial Report will be available on the County's website on the Finance Department's webpage at the following link:

<https://www.unioncountync.gov/government/departments-f-p/finance/popular-annual-financial-reports>

FINANCIAL IMPACT:

None.

25-010**Tax Refunds, Releases and Prorations Approved by Finance Officer****INFORMATION CONTACT:**

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

On September 8, 2020, the Board of Commissioners adopted a Resolution Delegating Authority for Tax Releases and Refunds of less than \$100 to Union County's Finance Officer. The resolution and NC GS 105-381(b) require such refunds to be reported to the Board regarding actions taken on requests for releases or refunds. All such actions shall be recorded in the Board's minutes. NC GS 105-330.6 authorizes the tax collector to direct an order for a tax refund of prorated taxes to the county finance officer related to surrendering of registered motor vehicle plates. The finance officer shall issue a refund to the vehicle owner. The attached report is for November 2024 NCVTS releases and refunds less than \$100 and prorations approved by the finance officer.

FINANCIAL IMPACT:

None.

25-012**Tax Collector's Departmental Report for November 2024****INFORMATION CONTACT:**

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

None.

25-016

FY2025 Budget Transfers Reporting - 2nd Quarter

INFORMATION CONTACT:

Blake Hart, Assistant Director, Budget & Grants Management, 704-283-3674

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Per section XIV, XV, XVI, XVII, XVIII, XIX, and XX of the FY 2025 Adopted Operating and Capital Budget Ordinance, management reports the following County Manager Budget Amendments (CMBA) made by the County Manager for the second quarter of fiscal year 2025.

CMBA 10: To recognize, receive, and appropriate state allocation of StRAP (Streamflow Rehabilitation Assistance Program) funds to conduct vegetative debris removal activities.

CMBA 11: To appropriate revenue and fund balance/retained earnings for outstanding contracts, purchase orders and available project/program balances for expenditures, projects and programs.

CMBA 12: Correction to Transfer balance on the expense side of the ARPA funds using the Fund balance appropriation.

CMBA 13: Transfer funds from the FY 2025 Longevity budget to the individual departments in the General Fund, Water and Sewer and Solid Waste.

FINANCIAL IMPACT:

None.

25-028

Monthly Update - Wastewater Treatment Capacity

INFORMATION CONTACT:

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

ACTION REQUESTED:

Receive status update on wastewater treatment capacity for the Twelve Mile Creek, Crooked Creek, Olde Sycamore, Tallwood, and Grassy Branch facilities.

PRIOR BOARD ACTIONS:

None

BACKGROUND:

Union County Water is closely monitoring the wastewater treatment

capacities at our Water Reclamation Facilities. Permitting Capacity is evaluated using the Actual Plant Flows plus the Permitted/Obligated Flows (unconnected). Union County Water was asked to provide regular updates. Plant flow information through December 2024 is summarized in the attached table.

Twelve Mile Creek

- Percent of Actual Flows = 72.0%
- Percent of Actual + Permitted Flows = 91.9%
- Actual Flows (MGD) = 5.403
- Actual + Permitted Obligated Flows (MGD) = 6.891

Crooked Creek

- Percent of Actual Flows = 59.6%
- Percent of Actual + Permitted Flows = 89.9%
- Actual Flows (MGD) = 1.133
- Actual + Permitted Obligated Flows (MGD) = 1.709

Olde Sycamore

- Percent of Actual Flows = 30.0%
- Percent of Actual + Permitted Flows = 30.0%
- Actual Flows (MGD) = 0.045
- Actual + Permitted Obligated Flows (MGD) = 0.045

Tallwood

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

Grassy Branch

- Percent of Actual Flows = 92.0%
- Percent of Actual + Permitted Flows = 94.0%
- Actual Flows (MGD) = 0.046
- Actual + Permitted Obligated Flows (MGD) = 0.047

In addition to the wastewater treatment capacities, flow volumes associated with development projects that are in the planning and review process within the Twelve Mile Creek and Crooked Creek WRF service areas are provided for information as well. Development flow volumes through December 2024 are summarized in the attached tables.

FINANCIAL IMPACT:

None

Business

[25-008](#)

FY 2024 Annual Comprehensive Financial Report

INFORMATION CONTACT:

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

ACTION REQUESTED:

Accept the FY 2024 Annual Comprehensive Financial Report

PRIOR BOARD ACTIONS:

None

BACKGROUND:

Cherry Bekaert LLP, a firm of licensed certified public accountants, has issued an unmodified opinion on Union County's financial statements for the year ended June 30, 2024. The independent auditor's report is located at the front of the financial section of this report. The audit was also designed to meet the requirements of the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards and the State Single Audit Implementation Act. These reports are submitted separately, and include the schedules of financial assistance, findings and questioned costs, and the independent auditor's report on internal control and compliance. The following is excerpted from the Report of Independent Auditor. "In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, the business-type activities, each major fund, and the aggregate remaining fund information of the County, as of June 30, 2024, and the respective changes in financial position and, where applicable, cash flows thereof, and the budgetary comparison for the General Fund for the year then ended in accordance with accounting principles generally accepted in the United States of America".

The FY 2024 Annual Comprehensive Financial Report (ACFR) will be available on the County's website on the Finance Department's webpage at the following link:

<https://www.unioncountync.gov/government/departments-f-p/finance/annual-comprehensive-financial-reports>

FINANCIAL IMPACT:

None

25-027

Economic Development Presentation

INFORMATION CONTACT:

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

ACTION REQUESTED:

Receive information.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County started its own Economic Development Department in early December 2024. This is to provide the board with an update on both the current status of economic development and goals as we look into the future.

FINANCIAL IMPACT:

None.

25-029

Senior Nutrition Update

INFORMATION CONTACT:

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

ACTION REQUESTED:

Receive information.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

There were several questions that were asked at the previous meeting about Union County's senior nutrition program. This is to provide an update and additional detail on the senior nutrition program and options the board may have.

FINANCIAL IMPACT:

None.

25-033

Request for Proposals - Legislative Lobbying Services

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve Request for Proposals for lobbying services.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County currently contracts with Navigator, LLC; this contract has been in place since August 1, 2020. The board has expressed interest in advertising a Request for Proposals for lobbying services. This is an opportunity for the board to discuss and determine how they want to move forward with lobbying services.

FINANCIAL IMPACT:

None.

25-034

Resolution - Resolution in Support of Local Legislation for Union County Concerning Local Government Zoning Control and Session Law 2024-57 (S.B. 382)

INFORMATION CONTACT:

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

ACTION REQUESTED:

- 1) Adopt the Resolution in Support of Local Legislation for Union County Concerning Local Government Zoning Control and Session Law 2024-57 (S.B. 382); and
- 2) Direct the County Manager, or his designee, to distribute the Resolution to all municipalities located in Union County.

PRIOR BOARD ACTIONS:

December 16, 2024, Regular Meeting, Agenda Item # 24-884 - Board adopted a Resolution in Support of Repeal or Amendment of Section

3K.1 of Session Law 2024-57

BACKGROUND:

On December 11, 2024, the General Assembly adopted Session Law 2024-57 (S.B. 382). A section of this bill, Section 3K.1 is entitled “No Local Government Initiated Down-Zoning without Consent of Affected Property Owner.” A major revision in this section removes a local government’s ability to initiate a “down-zoning amendment” to its own zoning regulations or zoning map unless certain highly burdensome requirements are met. This functionally prevents a local government’s ability to address population growth and limit population density in certain areas via down-zoning amendments.

The State-imposed zoning amendment removes the traditional authority and ability of local governments to amend their own regulations at the local level, thereby limiting the authority of local voters to express their policy preferences through local elected officials. Due to the adoption of this legislation, the Board adopted a Resolution in Support of Repeal or Amendment of Section 3K.1 of Session Law 2024-57 on December 16, 2024.

However, due to Union County’s particular position as one of the ten most populous counties in North Carolina, while also being one of the fastest growing counties in the State, it has unique issues concerning population growth, density, and related pressures as it adjoins one of the mostly highly urbanized areas of the United States. This necessitates the ability to respond to those issues through local zoning regulation. Thus, this resolution requests that the Union County Legislative Delegation bring forth to the General Assembly a bill, support such bill, and continuously advocate for the passage of such bill, which repeals the State imposed limitation on local government initiated down-zoning amendments set forth in Section 3K.2 of Session Law 2024-57.

FINANCIAL IMPACT:

None.

County Manager's Comments

Commissioners' Comments

Adjournment



Union County, NC

Staff Report

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

File #: 25-032

Agenda Date: 1/21/2025

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)(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 #: 25-023

Agenda Date: 1/21/2025

TITLE:

Task Order - Twelve Mile Creek WRF Chemical Sampling and Evaluation

INFORMATION CONTACT:

Christopher Clark, UC Water - Water & Wastewater Operations, Director, 704-296-4215

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Water owns and operates the Twelve Mile Creek WRF. This facility has a strict phosphorus limitation which requires chemical addition to aid in meeting this requirement. This task order is intended to facilitate a study to determine the best chemicals to use to optimize treatment plant operations during and after the 9.0 MGD expansion.

Hazen and Sawyer, P.C. has been selected to provide engineering services for task order #7364-5. Hazen and Sawyer, P.C. was chosen from a list of vendors previously selected from 2022-008 Engineering Services for Twelve Mile Creek WRF Expansion to 9.0 MGD to provide these services for Union County projects.

FINANCIAL IMPACT:

The total cost of the contract with Hazen and Sawyer, P.C. is \$68,140.00. Sufficient funds are available in Capital Account WRF Operations Budget - 60026710-5381.

APPENDIX

Exhibit A

TASK ORDER NUMBER: 7364-6

RFQ NUMBER: 2022-008

PROJECT NAME: Twelve Mile Creek WRF Chemical Sampling and Evaluation

This Task Order pertains to an Agreement (Contract #7364) by and between UNION COUNTY, NORTH CAROLINA (“OWNER”), and Hazen and Sawyer, P.C. (“ENGINEER”), dated October 28, 2021 (“the Agreement”). ENGINEER shall perform services on the project described below as provided herein and in the Agreement. This Task Order shall not be binding until it has been properly signed by both parties. Upon execution, this Task Order shall supplement the Agreement as it pertains to the project described below.

PART 1.0 PROJECT DESCRIPTION:

ENGINEER completed the design phase to expand the OWNER’s Twelve Mile Creek Water Reclamation Facility (WRF) from 7.5 mgd to 9.0 mgd. The purpose of this task order is for ENGINEER to complete a chemical system evaluation to support the implementation of the 9.0 mgd WRF expansion.

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

Basic services to be provided by ENGINEER include the following task as delineated and expanded in greater detail below and per the Agreement:

- Task No. 1 – Project Coordination and Development
- Task No. 2 – Carbon Chemical System Evaluation
- Task No. 3 – Alkalinity Chemical System Evaluation
- Task No. 4 – Allowance for Additional Services

TASK NO. 1 – Project Coordination and Development

Subtask 1.1 – The ENGINEER shall be responsible for overall project management for the project. The ENGINEER shall maintain documentation of project activities. The ENGINEER shall coordinate the work internally and externally to plan and schedule activities with and by the OWNER. The ENGINEER shall host a project kickoff meeting to review project scope, schedule, and planning of onsite activities (sampling plan and schedule, etc.).

Subtask 1.2 – The ENGINEER shall review and characterize five (5) years of the most recent influent, process, and effluent data for the five (5) WRFs – Twelve Mile Creek, Olde Sycamore, Crooked Creek, Tallwood, and Grassy Branch.

Subtask 1.3 – The ENGINEER shall develop a supplemental sample plan for the OWNER to perform sampling on the influent, process, and effluent of the Twelve Mile Creek WRF to aid in the chemical system desktop analysis. The ENGINEER shall host a meeting with the OWNER to review the sample plan and adjust the plan with comments from the OWNER to deliver the final plan for execution of the work.

Subtask 1.4 – The ENGINEER will include reimbursable expenses as appropriate in accordance with Part 6.0 of this Task Order and Section 6.1.5 of the Agreement.

TASK NO. 2 – Carbon Chemical System Evaluation

Subtask 2.1 – The ENGINEER shall utilize the data characterization and the supplemental sampling data to perform a carbon chemical system desktop analysis evaluation. The evaluation will include a literature review, supplemental carbon alternatives, proposed dosing locations, and estimated dosing and storage requirements. The ENGINEER will perform a 20-year net present total cost (NPTC) analysis to include capital costs for new chemical storage and feed facilities and labor, maintenance, and operating (electrical and chemical) costs.

Subtask 2.2 – The ENGINEER shall develop a technical memorandum (TM) summarizing the findings and recommendations for the OWNER. The ENGINEER shall host a meeting with the OWNER to review the TM and adjust the TM with comments from the OWNER to deliver the final TM.

TASK NO. 3 – Alkalinity Chemical System Evaluation

Subtask 3.1 – The ENGINEER shall utilize the data characterization and the supplemental sampling data to perform an alkalinity chemical system desktop analysis evaluation. The evaluation will include a literature review, supplemental alkalinity alternatives, proposed dosing locations, and estimated dosing and storage requirements. The ENGINEER will perform a 20-year NPTC analysis to include capital costs for new chemical storage and feed facilities and labor, maintenance, and operating (electrical and chemical) costs.

Subtask 3.2 – The ENGINEER shall develop a technical memorandum (TM) summarizing the findings and recommendations for the OWNER. The ENGINEER shall host a meeting with the OWNER to review the TM and adjust the TM with comments from the OWNER to deliver the final TM.

TASK NO. 4 – Allowance for Additional Services

The ENGINEER will perform additional services as requested by OWNER. Additional services will be performed only upon written authorization from OWNER, subject to the Not-to-Exceed cost ceiling set forth in Part 6.0.

PART 3.0 OWNER’S RESPONSIBILITIES:

OWNER shall provide ENGINEER the following:

- Authorize ENGINEER to proceed, in writing.
- Provide 5-years of most recent influent and effluent data of each WRF in electronic format (Excel).
- Provide 5-years of most recent plant operational data including: RAS and WAS flow rates and percent solids; aeration basins MLSS, SRT/MCRT, dissolved oxygen levels; and historical sludge production rates and disposal records.
- Consider all sketches, drawings, maps, and other documents submitted by ENGINEER, and inform ENGINEER of any required decisions.
- Make reasonably available all the information it has on existing utilities and information available for the facilities.

PART 4.0 PERIODS OF SERVICE:

Services as delineated previously herein shall be completed in accordance with the following tentative schedule:

<u>Milestone Description</u>	<u>Estimated Date</u>
Project Notice to Proceed	January 2025
Task No. 1 Completion	March 2025
Task No. 2 Completion	May 2025
Task No. 3 Completion	July 2025

PART 6.0 PAYMENT FOR SERVICES:

ENGINEER shall be compensated for the previously delineated Basic Scope of Services in accordance with the below indicated fee summary table and associated rate schedule by employee classification. A more detailed “Labor Effort” spreadsheet (Attachment No. 1) is appended to this Task Order and is incorporated herein by reference.

Task No.	Task Description	NTE Cost Ceiling	Total
1	Project Coordination and Development	\$23,820	\$23,820
2	Carbon Chemical System Evaluation	\$17,160	\$17,160
3	Alkalinity Chemical System Evaluation	\$17,160	\$17,160
4	Allowance for Additional Services	\$10,000	\$10,000
TOTAL PROJECT FEE			\$68,140

Notes:

1. Individual service category cost ceiling amounts may be re-apportioned to other service categories by OWNER if the Not-To-Exceed Cost Ceiling amount is not exceeded. Cost ceiling will not be exceeded without written amendment to this Task Order.
2. Reimbursable Expenses will be invoiced in accordance with Section 6.1.5 of the Agreement for Reimbursable Expenses and mileage will be charged at the federal rate.

Refer to Attachment No. 1 for hourly and fee breakdown. The following hourly billing rates were used for determining the fee amount:

<u>Classification</u>	<u>Hourly Billing Rate</u>
Vice President	\$300
Associate Vice President	\$290
Senior Associate	\$270
Associate	\$230
Senior Principal Engineer	\$195
Principal Engineer	\$175
Assistant Engineer II	\$155
Assistant Engineer I	\$135
Senior Principal Designer	\$185
Principal Designer	\$165
Designer	\$140
Administrative	\$90

This Task Order is executed this date of _____.

UNION COUNTY,
NORTH CAROLINA

HAZEN AND SAWYER

By: _____

By: _____

Name: Brian Matthews

Name: Michael D. Parker, P.E.

Title: County Manager

Title: Associate Vice President

Address: 500 North Main Street
Suite 600
Monroe, NC 28112

Address: 9101 Southern Pine Blvd
Suite 250
Charlotte, NC 28273

Approved as to Legal Form: BTI

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

Deputy Finance Officer

**Attachment No. 1
 Union County Water
 Twelve Mile Creek WRF
 Chemical Sampling and Evaluation
 Projected Manhours and Associated Fee**

Task No.	Description	VP (Hrs) \$300	Assoc VP (Hrs) \$290	Sr Assoc (Hrs) \$270	Associate (Hrs) \$230	Sr Princ Eng (Hrs) \$195	Princ Eng (Hrs) \$175	Asst Eng II (Hrs) \$155	Asst Eng I (Hrs) \$135	Sr Princ Des (Hrs) \$185	Princ Des (Hrs) \$165	Designer (Hrs) \$140	Const Obs (Hrs) \$140	Admin (Hrs) \$90	Total Labor Hrs (Hrs)	Total Labor Fee (\$)
1	Project Coordination and Development															
1.1	Internal and External Coordination	2	20			8								6	102	\$8,500
1.2	Data Characterization	10				40										\$10,800
1.3	Sample Plan Development	2	2			12										\$3,520
1.4	Expenses															\$1,000
	Subtotal	14	22	0	0	60	0	0	0	0	0	0	0	6	102	23,820
2	Carbon Chemical System Evaluation															
2.1	Desktop Anaysis, Facility Alternatives, Cost Estimating, NPTC		8			48										\$11,680
2.2	Technical Memorandum	4	4			16										\$5,480
	Subtotal	4	12	0	0	64	0	0	0	0	0	0	0	0	80	\$17,160
3	Alkalinity Chemical System Evaluation															
3.1	Desktop Anaysis, Facility Alternatives, Cost Estimating, NPTC		8			48										\$11,680
3.2	Technical Memorandum	4	4			16										\$5,480
	Subtotal	4	12	0	0	64	0	0	0	0	0	0	0	0	80	\$17,160
4	Allowance for Additonal Services															
	Subtotal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	\$10,000
	GRAND TOTAL	22	46	0	0	188	0	0	0	0	0	0	0	6	262	\$68,140



Union County, NC

Staff Report

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

File #: 25-014

Agenda Date: 1/21/2025

TITLE:

Contract - Transportation Propane Pump and Fueling System

INFORMATION CONTACT:

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

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:

On October 21, 2024, the Procurement Department partnered with The Human Services Transportation Department to issue an Invitation for Bid 2025-012 Transportation Propane Pump and Fueling System. On November 12, 2024, four bids for the title project were received and processed. After review, three (3) bids were deemed non-responsive and not subject to award. Blossman Gas of North Carolina's bid, in the amount of \$35,976.00, was tabulated and certified by the Transportation Department. Staff recommends that the project be awarded to the lowest responsive, responsible bidder, Blossman Gas of North Carolina, Inc.

FINANCIAL IMPACT:

The anticipated annual cost for the service is \$35,976.00. Since this contract has an initial term of two (2) years, with three one-year renewal options, a total of \$179,880.00 is estimated to be spent. Funding is available in the FY2025 budget, with future expenditures subject to annual BOCC budget appropriation.

STATE OF NORTH CAROLINA

AGREEMENT

COUNTY OF UNION

THIS AGREEMENT is made and entered into as of _____, by and between UNION COUNTY, a political subdivision of the State of North Carolina, whose address is 500 North Main Street, Monroe, NC 28112, hereinafter “Union,” and BLOSSMAN GAS OF NORTH CAROLINA, INC., a North Carolina corporation, whose address is 6109 Wilkinson Blvd., Belmont, NC 28012, hereinafter “Contractor.”

W I T N E S S E T H

WHEREAS, Contractor is a supplier of certain propane gas, hereinafter referred to as “Goods;” and

WHEREAS, Union desires to purchase such Goods from Contractor on an as-needed basis, along with related components to allow for distribution of the Goods from Union’s facility; and

WHEREAS, Contractor is willing to provide such Goods to Union as described in this Agreement.

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

1. GOODS PROVIDED. Contractor agrees to provide the Goods in accordance with the specifications in the attached Specifications. Contractor shall provide the Goods at a minimum of weekly, or more frequently on an as-needed basis, upon request by Union for such Goods. Contractor shall ensure the propane tank does not go empty throughout the term of this Agreement. For orders above and beyond the required weekly deliveries, Union shall provide a purchase order number to Contractor prior to any Goods being delivered. Contractor shall not be required to provide installation services pursuant to this Agreement. Union does not guarantee the purchase of any minimum amount of Goods pursuant to this Agreement.

2. FEE AND PAYMENT SCHEDULE. Union shall pay Contractor for purchase of the Goods in accordance with the attached “Appendix A – Bid Form.” Contractor shall invoice Union for Goods after each delivery has been completed pursuant to Section 1 herein. If applicable pursuant to Section 1 herein, Contractor’s invoice must reference the purchase order number issued by Union. Payment is due within thirty (30) days of receipt of an accurate invoice by Union’s Finance Department. All payments shall be conditioned upon appropriation by the Union County Board of Commissioners of sufficient funds for each request for services.

If the Agreement is renewed for additional terms in accordance with Section 4 herein, at the beginning of each Renewal Term, Contractor may adjust the prices listed in Appendix A by multiplying unit price effective the previous term by the quotient of the All Urban Consumers Price Index (CPI-U) (South Region), Other Goods and Services with the Index Period of 2024-2028 as published by the Bureau of Labor Statistics, United States Department of Labor, in effect 90 days prior to the commencement date of the new renewal term, divided by such CPI-U in effect for the same month one year prior to such renewal term commencement date. In no

event, however, shall any unit price increase by more than 5% from one term to the next. Contractor must make a written request for an increase in the unit pricing within thirty (30) days from the date of Union's notice to exercise its option to renew the Agreement.

3. DELIVERY SCHEDULE. Contractor shall ship requested Goods described in Section 1 herein FOB destination, Freight Prepaid. Delivery of Goods requested by Union outside of the required weekly delivery schedule shall be made within twenty-four (24) hours of Contractor's receipt of Union's order.

4. TERM AND TERMINATION. The Effective Date is the date of mutual execution of this Agreement. This Agreement shall have a term of two (2) years (the "Initial Term"). Upon completion of the Initial Term, Union may, in its sole discretion, elect to renew this Agreement for up to three (3) additional one-year terms, each a "Renewal Term," upon written notice to the Contractor. Union may terminate this Agreement at any time, with or without cause, by notification to Contractor in writing. In the event of termination without cause, Contractor shall be paid for Goods delivered to the date of notification of termination by Union.

5. OWNERSHIP OF DOCUMENTS. All deliverables and any other contract documents prepared by Contractor, or any subcontractors or subconsultants under the terms of this Agreement ("the Documents"), shall be the property of Union. Contractor further acknowledges that Union is subject to Chapter 132 of the North Carolina General Statutes, the Public Records Act (the "Act"), and that this Agreement, as well as any of the Documents as defined herein, shall be a public record as defined in such Act, and as such, will be open to public disclosure and copying.

6. INSURANCE. The attached Exhibit A, Insurance Requirements, is incorporated herein by reference.

7. INDEMNIFICATION. Contractor agrees to protect, defend, indemnify and hold Union, its officers, employees and agents free and harmless from and against any and all losses, penalties, damages, settlements, costs, charges, professional fees or other expenses or liabilities of every kind and character arising out of or relating to any and all claims, liens, demands, obligations, actions, proceedings, or causes of action of every kind in connection with or arising out of this Agreement and/or the performance hereof that are due, in whole or in part, to the negligence of Contractor, its officers, employees, subcontractors or agents. Contractor further agrees to investigate, handle, respond to, provide defense for, and defend the same at its sole expense and agrees to bear all other costs and expenses related thereto.

8. FEDERAL, STATE, AND LOCAL TAXES. Neither federal, nor state, nor local income tax nor payroll tax of any kind shall be withheld or paid by Union on behalf of Contractor or the employees of Contractor. Contractor shall not be treated as an employee with respect to the services performed hereunder for federal or state tax purposes.

9. NOTICE TO CONTRACTOR REGARDING ITS TAX DUTIES AND LIABILITIES. Contractor understands that Contractor is responsible to pay, according to law, Contractor's income tax. If Contractor is not a corporation, Contractor further understands that

Contractor may be liable for self-employment (social security) tax, to be paid by Contractor according to law.

10. FRINGE BENEFITS. Because Contractor is engaged in Contractor's own independently established business, Contractor is not eligible for, and shall not participate in, any employee pension, health or other fringe benefit plan of Union.

11. UNION NOT RESPONSIBLE FOR WORKERS' COMPENSATION. No workers' compensation insurance shall be obtained by Union concerning Contractor or the employees of Contractor. Contractor shall comply with the workers' compensation law concerning Contractor and the employees of Contractor.

12. NO AUTHORITY TO BIND UNION. Contractor has no authority to enter into contracts or agreements on behalf of Union. This Agreement does not create a partnership or any form of agency between the parties.

13. ASSIGNMENT. Neither Union nor Contractor shall assign, sublet or transfer any rights under or interest in this Agreement (including, but without limitation, monies that may become due or monies that are due) without the written consent of the other, except to the extent that any assignment, subletting or transfer is mandated by law or the effect of this limitation may be restricted by law. Unless specifically stated to the contrary in any written consent to assignment, no assignment shall release or discharge the assignor from any duty or responsibility under this Agreement.

14. NON-WAIVER. The failure of either party to exercise any of its rights under this agreement for a breach thereof shall not be deemed to be a waiver of such rights or a waiver of any subsequent breach.

15. HOW NOTICES SHALL BE GIVEN. Any notice given in connection with this agreement shall be given in writing and shall be delivered either by hand to the party or by certified mail, return receipt requested, to the party at the party's address stated herein. Any party may change its address stated herein by giving notice of the change in accordance with this paragraph.

16. APPLICABLE LAW AND JURISDICTION. This Agreement shall be construed and enforced in accordance with the laws of the State of North Carolina. The parties to this Agreement confer exclusive jurisdiction of all disputes arising hereunder upon the General Courts of Justice of Union County, North Carolina.

17. FEDERAL REQUIREMENTS. This Agreement shall be financed, in part, by grants provided under the Federal Transit Act, as amended. References include, but are not limited to, the Master Agreement, FTA MA (14) dated October 1, 2013; FTA Circular 4220.1F dated November 1, 2008, as subsequently amended; "Best Practices Procurement & Lessons Learned Manual," updated October 2016; and 49 CFR Part 18 (State and Local Government) and 49 CFR Part 19 (Institutions of Higher Education, Hospitals, and Other Non-profit Organizations), and any subsequent amendments or revisions thereto. The Contractor shall at all times comply with applicable Federal Transit Administration (FTA) regulations, policies, procedures, and directives, including without limitation those listed directly or by reference in the Master Agreement between Union and the FTA, as they may be amended or promulgated

from time to time during the term of this Agreement. Contractor's failure to so comply shall constitute a material breach of this Agreement.

A. Disadvantaged Business Enterprises. The newest version of the Department of Transportation's Disadvantaged Business Enterprise (DBE) program became effective October 1, 2004.

- i. This Agreement is subject to the requirements of Title 49, Code of Federal Regulations, Part 26, *Participation by Disadvantaged Business Enterprises in Department of Transportation Financial Assistance Programs* and with Section 1101(b) of SAFETEA-LU, 23 U.S.C. §101. The NC Department of Transportation Public Transportation Division's overall goal for DBE participation is 4.31%. The Contractor will be required to report its DBE participation obtained through race-neutral means throughout the term of this Agreement.
- ii. The Contractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this Agreement. The Contractor shall carry out applicable requirements of 49 CFR Part 26 in the award and administration of this DOT-assisted Agreement. Failure by the Contractor to carry out these requirements is a material breach of this Agreement which may result in termination of this Agreement, or such other remedy as Union deems appropriate. If Contractor is authorized to execute a subcontract for this Agreement, such subcontract shall include the assurance in this paragraph.
- iii. If Contractor is authorized to subcontract goods or services provided under this Agreement, Contractor shall pay all subcontractors within thirty (30) days after receipt of payment from Union for services or goods provided by such subcontractors.
- iv. Contractor shall notify Union whenever a DBE subcontractor performing work related to this Agreement is terminated or fails to complete its work, and the Contractor must make good faith efforts to engage another DBE subcontractor to perform at least the same amount of work. The Contractor may not terminate any DBE subcontractor and perform that work through its own forces or those of an affiliate without the prior written consent of Union.

B. Civil Rights

- i. Nondiscrimination. In accordance with Title VI of the Civil Rights Act, as amended, 42 U.S.C. § 2000d, section 303 of the Age Discrimination Act of 1975, as amended, 42 U.S.C. § 6101 et seq., section 202 of the Americans with Disabilities Act of 1990, 42 U.S.C. § 12101, and Federal transit law at 49 U.S.C. § 5332, the Contractor agrees that it will not discriminate against any employee or applicant for employment because of race, color, creed, national origin, sex, age, or disability. In addition, the Contractor agrees to comply with applicable Federal implementing regulations and other implementing requirements FTA may issue. The Contractor and all lower tiers, if the Contractor is authorized to subcontract, shall comply with all provisions of FTA Circular 4701.1A, "Title VI and Title VI Dependent Guidelines for Federal Transit Administration recipients", May 13, 2007.

- ii. Equal Employment Opportunity. The following equal employment opportunity requirements apply to this Agreement:
 - a. Race, Color, Creed, National Origin, Sex - In accordance with Title VII of the Civil Rights Act, as amended, 42 U.S.C. § 2000e, and Federal transit laws at 49 U.S.C. § 5332, the Contractor agrees to comply with all applicable equal employment opportunity requirements of U.S. Department of Labor (U.S. DOL) regulations, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor," 41 C.F.R. Parts 60 et seq., (which implement Executive Order No. 11246, "Equal Employment Opportunity," as amended by Executive Order No. 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," 42 U.S.C. § 2000e note), and with any applicable Federal statutes, executive orders, regulations, and Federal policies that may in the future affect construction activities undertaken in the course of the Project. The Contractor agrees to take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, creed, national origin, sex, or age. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. In addition, the Contractor agrees to comply with any implementing requirements FTA may issue.
 - b. Equal Employment Opportunity Requirements for Construction Activities. For activities determined by the U.S. Department of Labor (U.S. DOL) to qualify as "construction," the Contractor agrees to comply and assures the compliance of each subcontractor at any tier of the Project, with all applicable equal employment opportunity requirements of U.S. DOL regulations, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor," 41 C.F.R. Parts 60 et seq., which implement Executive Order No. 11246, "Equal Employment Opportunity," as amended by Executive Order No. 11375, "Amending Executive Order No. 11246 Relating to Equal Employment Opportunity," 42 U.S.C. § 2000(e) note, and also with any Federal laws, regulations, and directives affecting construction undertaken pursuant to the Agreement.
- iii. Nondiscrimination on the Basis of Age. The Contractor agrees to comply with all applicable requirements of the Age Discrimination Act of 1975, as amended, 42 U.S.C. §§ 6101 et seq., and with implementing U.S. Health and Human Services regulations, "Nondiscrimination on the Basis of Age in Programs or Activities Receiving Federal Financial Assistance, 45 C.F.R. Part 90, which prohibit discrimination against individuals on the basis of age.
- iv. Access for Individuals with Disabilities. The Contractor agrees to comply

with 49 U.S.C. § 5301(d), which states the Federal policy that elderly individuals and individuals with disabilities have the same right as other individuals to use public transportation services and facilities, and that special efforts shall be made in planning and designing those services and facilities to implement transportation accessibility rights for elderly individuals and individuals with disabilities. The Contractor also agrees to comply with all applicable provisions of section 504 of the Rehabilitation Act of 1973, as amended, with 29 U.S.C. § 794, which prohibits discrimination on the basis of disability; with the Americans with Disabilities Act of 1990 (ADA), as amended, 42 U.S.C. §§ 12101 *et seq.*, which requires that accessible facilities and services be made available to individuals with disabilities; and with the Architectural Barriers Act of 1968, as amended, 42 U.S.C. §§ 4151 *et seq.*, which requires that buildings and public accommodations be accessible to individuals with disabilities. In addition, the Contractor agrees to comply with applicable Federal regulations and directives and any subsequent amendments thereto, except to the extent the Federal Government determines otherwise in writing, as follows:

- a. U.S. DOT regulations “Transportation Services for Individuals with Disabilities (ADA)” 49 C.F.R. Part 37;
- b. U.S. DOT regulations “Nondiscrimination on the Basis of Handicap in Programs and Activities Receiving or Benefiting from Federal Financial Assistance,” 49 C.F.R. Part 27;
- c. Joint U.S. Architectural and Transportation Barriers Compliance Board (U.S. ATBCB) U.S. DOT regulations, “Americans with Disabilities (ADA) Accessibility Specifications for Transportation Vehicles,” 36 C.F.R. Part 1192 and 49 C.F. R. Part 38;
- d. U.S. DOJ regulations “Nondiscrimination on the Basis of Disability in State and Local Government Services,” 28 C.F.R. Part 35;
- e. U.S. DOJ regulations “Nondiscrimination on the Basis of Disability by Public Accommodations and in Commercial Facilities.” 28 C.F.R. Part 36;
- f. U.S. GSA regulations “Accommodations for the Physically Handicapped,” 41 C.F.R. Subpart 101-19;
- g. U.S. Equal Employment Opportunity Commission, “Regulations to Implement the Equal Employment Provisions of the Americans with Disabilities Act,” 29 C.F.R. Part 1630;
- h. U.S. Federal Communications Commission regulations “Telecommunications Relay Services and Related Customer Premises Equipment for the Hearing and Speech Disabled,” 49 C.F.R. Part 64, Subpart F;
- i. U.S. Architectural and Transportation Barriers Compliance Board regulations, “Electronic and Information Technology Accessibility Standards.” 36 C.F.R. Part 1194;
- j. FTA regulations, "Transportation of Elderly and Handicapped Persons," 49 C.F.R. part 609; and

- k. Federal civil rights and nondiscrimination directives implementing the foregoing regulations.

 - v. Access to Services for Persons with Limited English Proficiency. The Contractor agrees to comply with Executive Order No. 13166, "Improving Access to Services for Persons with Limited English Proficiency," 42 U.S.C. § 2000d-1 note, and U.S. DOT Notice, "DOT Policy Guidance Concerning Recipients' Responsibilities to Limited English Proficiency (LEP) Persons," 70 *Fed. Reg.* 74087, December 14, 2005.

 - vi. Environmental Justice. The Contractor agrees to comply with the policies of Executive Order No. 12898, "Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations," 42 U.S.C. § 4321 note.

 - vii. Drug or Alcohol Abuse – Confidentiality and Other Civil Rights Protections. To the extent applicable, the Contractor agrees to comply with the confidentiality and other civil rights protections of the Drug Abuse Office and Treatment Act of 1972, as amended, 21 U.S.C. §§ 1101 *et seq.*, with the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970, as amended, 42 U.S.C. §§ 4541 *et seq.*, and with the Public Health Service Act of 1912, as amended, 42 U.S.C. §§ 201 *et seq.*, and any amendments to these laws.

 - viii. Other Nondiscrimination Statutes. The Contractor agrees to comply with all applicable requirements of any other nondiscrimination statute(s) that may apply to this Agreement.

 - ix. The Contractor also agrees to include these requirements in each subcontract financed in whole or in part with Federal assistance provided by FTA, modified only if necessary to identify the affected parties.
- C. Environmental Protection. The Contractor agrees to comply with all applicable requirements of the National Environmental Policy Act of 1969, as amended 42 U.S.C. subsection 4321 *et seq.* in accordance with Executive Order No. 12898, "Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations," 59 *Fed. Reg.* 7629, Feb. 16, 1994, FTA statutory requirements on environmental matters at 49 U.S.C. section 5324(b); Council on Environmental Quality regulations on compliance with the National Environmental Policy Act of 1969, as amended, 40 C.F.R. Part 1500 *et seq.* and joint FHWA FTA regulations, "environmental Impact and Related procedures," 23 C.F.R. Part 771 and 49 C.F.R. Part 622; and when promulgated, FHWA/FTA joint regulations, "NEPA and Related Procedures for Transportation Decision-making, Protection of Public Parks, Wildlife and Waterfowl Refuges, and Historic Sites," 23 C.F.R. Part 1420 and 49 C.F.R. Part 623. As a result of enactment of 23 U.S.C. §§ 139 and 326 as well as amendments to 23 U.S.C. § 138, environmental decision-making requirements imposed on FTA projects to be implemented consistent with the joint FHWA/FTA final guidance,

“SAFETEA-LU Environmental Review Process (Public Law 109-59), “ 71 Fed. Reg. 66576 et seq. November 15, 2006 and any subsequent applicable Federal directives that may be issued, except to the extent that FTA determines otherwise in writing.

- D. Energy Conservation. The Contractor agrees to comply with mandatory standards and policies relating to energy efficiency that are contained in the state energy conservation plans issued in compliance with the Energy Policy and Conservation Act, 42 U.S.C. Sect. 6321 *et seq.*
- E. Cargo Preference. 46 U.S.C. 55305 and 46 CFR Part 381 impose cargo preference requirements in contracts and subcontracts in which equipment, materials or commodities may be transported by ocean vessel in carrying out the project. If the Contractor has knowledge of or anticipates any equipment, materials or commodities that may be shipped by ocean vessel, the Contractor is obligated to inform Union, so that additional requirements and clauses may be attached to this Agreement.
- F. Fly America. The Contractor agrees to comply with 49 U.S.C. 40118 (the "Fly America" Act) in accordance with the General Services Administration's regulations at 41 CFR Part 301- 10, which provide that recipients and subrecipients of Federal funds and their contractors are required to use U.S. Flag air carriers for U.S. Government-financed international air travel and transportation of their personal effects or property, to the extent such service is available, unless travel by foreign air carrier is a matter of necessity, as defined by the Fly America Act. The Contractor shall submit, if a foreign air carrier was used, an appropriate certification or memorandum adequately explaining why service by a U.S. flag air carrier was not available or why it was necessary to use a foreign air carrier and shall, in any event, provide a certificate of compliance with the Fly America requirements. The Contractor agrees to include the requirements of this section in all subcontracts that may involve international air transportation.
- G. Debarment and Suspensions. This Agreement is a covered transaction for purposes of 49 CFR Part 29. As such, the Contractor is required to verify that none of the Contractor, its principals, as defined at 49 CFR 29.995, or affiliates, as defined at 49 CFR 29.905, are excluded or disqualified as defined at 49 CFR 29.940 and 29.945. The Contractor is required to comply with 49 CFR 29, Subpart C and must include the requirement to comply with 49 CFR 29, Subpart C in any lower tier covered transaction it enters into.
- H. Recycled Products. The Recycled Products requirement applies to all contracts for items designated by the EPA, when Union or Contractor procures \$10,000 or more of one of these items during the fiscal year, or has procured \$10,000 or more of such items in the previous fiscal year, using Federal funds. New requirements for "recovered materials" will become effective May 1, 1996. These regulations apply to all procurement actions involving items designated by the EPA, where the procuring agency purchases \$10,000 or more of one of these items in a fiscal year, or when the cost of such items purchased during the previous fiscal year was

\$10,000. These requirements flow down to all to all contractor and subcontractor tiers.

The Contractor agrees to comply with all the requirements of Section 6002 of the Resource Conservation and Recovery Act (RCRA), as amended (42 U.S.C. 6962), including but not limited to the regulatory provisions of 40 CFR Part 247, and Executive Order 12873, as they apply to the procurement of the items designated in Subpart B of 40 CFR Part 247. These items include:

Paper and paper products, excluding building and construction paper grades.

Vehicular products:

- (a) Lubricating oils containing re-refined oil, including engine lubricating oils, hydraulic fluids, and gear oils, excluding marine and aviation oils;
- (b) Tires, excluding airplane tires;
- (c) Reclaimed engine coolants, excluding coolants used in non-vehicular applications.
- (d) Rebuilt vehicular parts.

Construction products:

- (a) Building insulation products, including the following items:
 - (1) Loose-fill insulation, including but not limited to cellulose fiber, mineral fibers (fiberglass and rock wool), vermiculite, and perlite;
 - (2) Blanket and batt insulation, including but not limited to mineral fibers (fiberglass and rock wool);
 - (3) Board (sheathing, roof decking, wall panel) insulation, including but not limited to structural fiberboard and laminated paperboard products, perlite composite board, polyurethane, polyisocyanurate, polystyrene, phenolics, and composites; and
 - (4) Spray-in-place insulation, including but not limited to foam-in-place polyurethane and polyisocyanurate, and spray-on cellulose.
- (b) Structural fiberboard and laminated paperboard products for applications other than building insulation, including building board, sheathing, shingle backer, sound deadening board, roof insulating board, insulating wallboard, acoustical and non-acoustical ceiling tile, acoustical and non-acoustical lay-in panels, floor underlayments, and roof overlay (coverboard).
- (c) Cement and concrete, including concrete products such as pipe and block containing:
 - (1) Coal fly ash;
 - (2) Ground granulated blast furnace slag (GGBF);
 - (3) Cenospheres; or
 - (4) Silica fume from silicon and ferrosilicon metal production.
- (d) Carpet made from polyester fiber made from recovered materials for use in moderate-wear applications such as single-family housing and similar wear applications.
- (e) Floor tiles and patio blocks containing recovered rubber or plastic.
- (f) Shower and restroom dividers/partitions containing recovered plastic or steel.
- (g) (1) Consolidated latex paint used for covering graffiti; and

- (2) Reprocessed latex paint used for interior and exterior architectural applications such as wallboard, ceilings, and trim; gutter boards; and concrete, stucco, masonry, wood, and metal surfaces.
- (h) Carpet cushion made from bonded polyurethane, jute, synthetic fibers, or rubber containing recovered materials.
- (i) Flowable fill containing coal fly ash and/or ferrous foundry sands.
- (j) Railroad grade crossing surfaces made from cement and concrete containing fly ash, recovered rubber, recovered steel, recovered wood, or recovered plastic.
- (k) Modular threshold ramps containing recovered steel, rubber, or aluminum.
- (l) Nonpressure pipe containing recovered steel, plastic, or cement.
- (m) Roofing materials containing recovered steel, aluminum, fiber, rubber, plastic or plastic composites, or cement.

Transportation products:

- (a) Traffic barricades and traffic cones used in controlling or restricting vehicular traffic.
- (b) Parking stops made from concrete or containing recovered plastic or rubber.
- (c) Channelizers containing recovered plastic or rubber.
- (d) Delineators containing recovered plastic, rubber, or steel.
- (e) Flexible delineators containing recovered plastic.

Miscellaneous products:

- (a) Pallets containing recovered wood, plastic, or paperboard.
- (b) Sorbents containing recovered materials for use in oil and solvent clean-ups and as animal bedding.
- (c) Industrial drums containing recovered steel, plastic, or paper.
- (d) Awards and plaques containing recovered glass, wood, paper, or plastic.
- (e) Mats containing recovered rubber and/or plastic.
- (f) (1) Non-road signs containing recovered plastic or aluminum and road signs containing recovered aluminum.
- (2) Sign supports and posts containing recovered plastic or steel.
- (g) Manual-grade strapping containing recovered steel or plastic.
- (h) Bike racks containing recovered steel or plastic.
- (i) Blasting grit containing recovered steel, coal and metal slag, bottom ash, glass, plastic, fused alumina oxide, or walnut shells.

Park and recreation products:

- (a) Playground surfaces and running tracks containing recovered rubber or plastic.
- (b) Plastic fencing containing recovered plastic for use in controlling snow or sand drifting and as a warning/safety barrier in construction or other applications.
- (c) Park benches and picnic tables containing recovered steel, aluminum, plastic, or concrete.
- (d) Playground equipment containing recovered plastic, steel, or aluminum.

Landscaping products:

- (a) Hydraulic mulch products containing recovered paper or recovered wood used for hydroseeding and as an over-spray for straw mulch in landscaping, erosion control, and soil reclamation.
- (b) Compost made from yard trimmings, leaves, grass clippings, and/ or food

waste for use in landscaping, seeding of grass or other plants on roadsides and embankments, as a nutritious mulch under trees and shrubs, and in erosion control and soil reclamation.

- (c) Garden and soaker hoses containing recovered plastic or rubber.
- (d) Lawn and garden edging containing recovered plastic or rubber.
- (e) Plastic lumber landscaping timbers and posts containing recovered materials.

Non-paper office products:

- (a) Office recycling containers and office waste receptacles.
- (b) Plastic desktop accessories.
- (c) Toner cartridges.
- (d) Plastic-covered binders containing recovered plastic; chipboard and pressboard binders containing recovered paper; and solid plastic binders containing recovered plastic.
- (e) Plastic trash bags.
- (f) Printer ribbons.
- (g) Plastic envelopes.
- (h) Plastic clipboards containing recovered plastic.
- (i) Plastic file folders containing recovered plastic.
- (j) Plastic clip portfolios containing recovered plastic.
- (k) Plastic presentation folders containing recovered plastic.
- (l) Office furniture containing recovered steel, aluminum, wood, agricultural fiber, or plastic.

I. No Federal Government Obligations to Third Parties. Union and Contractor acknowledge and agree that, notwithstanding any concurrence by the Federal Government in or approval of the solicitation or award of the Agreement, absent the express written consent by the Federal Government, the Federal Government is not a party to this Agreement and shall not be subject to any obligations or liabilities to Union, Contractor, or any other party (whether or not a party to that contract) pertaining to any matter resulting from this Agreement. The Contractor agrees to include the preceding clause in each subcontract financed in whole or in part with Federal assistance provided by FTA. It is further agreed that the clause shall not be modified, except to identify the subcontractor who will be subject to its provisions.

J. False or Fraudulent Statements or Claims.

- i. The Contractor acknowledges that the provisions of the Program Fraud Civil Remedies Act of 1986, as amended, 31 U.S.C. §3801 *et seq.* and U.S. DOT regulations, "Program Fraud Civil Remedies," 49 C.F.R. Part 31, apply to its activities in connection with this Agreement. Accordingly, upon execution of the Agreement the Contractor certifies or affirms the truthfulness and accuracy of any statement it has made, it makes, it may make, or causes to be made, pertaining to the underlying contract or the FTA assisted project for which this contract work is being performed. In addition to other penalties that may apply, the Contractor also acknowledges that if it makes a false, fictitious, or fraudulent claim, statement, submission,

or certification to the Federal Government, the Federal Government reserves the right to impose the penalties of the Program Fraud Civil Remedies Act of 1986, as amended, on the Contractor to the extent the Federal Government deems appropriate.

- ii. The Contractor also acknowledges that if it makes a false, fictitious, or fraudulent claim, statement, submission, certification, assurance or representation to the Federal Government or includes a false, fictitious, or fraudulent statement or representation in any agreement involving a project authorized under 49 U.S.C. chapter 53 or any other Federal statute, the Federal Government reserves the right to impose on the Contractor the penalties of 18 U.S.C. § 1001 or other applicable Federal statute to the extent the Federal Government deems appropriate.
- iii. The Contractor agrees to include the above two clauses in each subcontract financed in whole or in part with Federal assistance provided by FTA. It is further agreed that the clauses shall not be modified, except to identify the subcontractor who will be subject to the provisions.

K. Access to Records and Reports. The Contractor agrees to permit, and require its subcontractors to permit, the U.S. Secretary of Transportation, and the Comptroller General of the United States, and, to the extent appropriate, the State, or their authorized representatives, upon their request to inspect all Project work, materials, payrolls, and other data, and to audit the books, records, and accounts of the Contractor and its subcontractors pertaining to the Project, as required by 49 U.S.C. § 5325(g).

Contractor also agrees, pursuant to 49 C.F.R. 633.17 to provide the FTA Administrator or his authorized representatives including any PMO Contractor access to Contractor's records and construction sites pertaining to a major capital project, defined at 49 U.S. D. 5302(a)1, which is receiving federal financial assistance through the programs described at 49 U.S.C. 5307, 5309 or 5311.

The Contractor agrees to permit any of the foregoing parties to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed.

The Contractor agrees to maintain all books, records, accounts and reports required under this Agreement for a period of not less than three (3) years after that date of termination or expiration of this Agreement, except in the event of litigation or settlement of claims arising from the performance of this Agreement, in which case Contractor agrees to maintain same until the Purchaser, the FTA Administrator, the Comptroller General, or any of their duly authorized representatives have disposed of all such litigation, appeals, claims or exceptions related thereto. Reference 49 C.F.R. 18.39 (i)(11).

L. Incorporation of FTA Terms. The preceding provisions include, in part, certain Standard Terms and Conditions required by DOT, whether or not expressly set forth in the preceding contract provisions. All contractual provisions required by DOT, as

set forth in FTA Circular 4220.1E, dated June 19, 2003, are hereby incorporated by reference. Anything to the contrary herein notwithstanding, all FTA mandated terms shall be deemed to control in the event of a conflict with other provisions contained in this Agreement. The Contractor shall not perform any act, fail to perform any act, or refuse to comply with any Union requests which would cause Union to be in violation of the FTA terms and conditions.

- M. Seat Belt Usage. Pursuant to Executive Order No. 13043, April 16, 1997, 23 U.S.C. § 402, the Contractor is encouraged to adopt on the job seat belt use policies and programs for its employees when operating company owned, rented, or personally operated vehicles and include this provision in any third party subcontracts entered into under this Agreement.
- N. Exclusionary or Discriminatory Specifications. The Contractor agrees that it will comply with the requirements of 49 U.S.C. Sect. 5325(h) by refraining from using any funds derived from FTA in performance of this Agreement to support procurements using exclusionary or discriminatory specifications.
- O. Metric System. To the extent required by U.S. DOT or FTA, the Contractor agrees to use the metric system of measurement in its Agreement activities as may be required by 49 U.S.C. Sect. 205a et seq.; Executive Order No. 12770, "Metric Usage in Federal Government Programs," 15 U.S.C. Sect. 205a; and other regulations, guidelines and policies issued by U.S. DOT or FTA. To the extent practicable and feasible, the Contractor agrees to accept products and services with dimensions expressed in the metric system of measurement.

18. **BREACH OF CONTRACT**. If the Contractor fails to make delivery of the equipment, supplies, or services within the specified terms of the Agreement, or fails to perform within the provisions of the Agreement, the Agreement may be terminated by reason of default or breach. A written notice of default or breach of contract shall be presented to the Contractor within three (3) working days of such failure. The Contractor will only be paid the contract price for equipment, supplies, or services delivered and accepted in accordance with the requirements set forth in the contract. If it is determined that the Contractor had an excusable reason for not performing, such as a strike, fire, or flood, events which are not the fault of or are beyond the control of the Contractor, Union, after setting up a new delivery of performance schedule, may allow the Contractor to continue work, or treat the termination as a termination for convenience. Union, in its sole discretion, may, in the case of breach of contract, allow the Contractor a specified period of time in which to correct the defect. In such case, the notice of termination will state the time period in which the correction is permitted and other appropriate conditions. If Contractor fails to remedy to Union's satisfaction the breach or default or any of the terms, covenants, or conditions of this Agreement within twenty (20) days after written notice from Union setting forth the nature of said breach or default, Union shall have the right to terminate the Agreement without any further obligation to Contractor. Any such termination for default shall not in any way operate to preclude Union from also pursuing all available remedies against Contractor and its sureties for said breach or default.

19. RESOLUTION OF DISPUTES. Any claim, dispute, or other matter in question arising out of or related to this Agreement shall be subject to mediation as a condition precedent to the institution of legal or equitable proceedings by either party. Union and Contractor shall endeavor to resolve claims, disputes and other matters in question between them by mediation which, unless the parties mutually agree otherwise, shall be in accordance with the Rules Implementing Statewide Mediated Settlement Conferences in Superior Court Civil Actions promulgated pursuant to N.C. Gen. Stat. § 7A-38.1, or any successive statutory alternative dispute resolution rules or requirements. A request for mediation shall be filed in writing with the other party to this Agreement. The mediator must be certified by, and in good standing with, the North Carolina Dispute Resolution Commission. The parties agree to split the mediator's fee and any filing fees equally and to pay such fees promptly on demand. The mediation shall be held in Union County, North Carolina, unless the parties and mediator mutually agree on another location. The parties agree that if there is no resolution of a dispute satisfactory to both parties pursuant to the mediation procedure outlined in this Section within sixty (60) days after the request for mediation is filed with the other party, the next step in the dispute resolution process, and the binding method of dispute resolution, shall be litigation in a the General Courts of Justice of the State of North Carolina sitting in Union County, North Carolina.

20. COMPLETE AGREEMENT. This Agreement contains the complete agreement of the parties regarding the terms and conditions of the Agreement, and there are no oral or written conditions, terms, warranties, understandings or other agreements pertaining thereto which have not been incorporated herein. This Agreement may be modified only by written instrument duly executed by both parties, or their respective successors in interest.

21. SEVERABILITY. The provisions hereof are severable, and should any provision be determined to be invalid, unlawful or otherwise null and void by any court of competent jurisdiction, the other provisions shall remain in full force and effect and shall not thereby be affected unless such ruling shall make further performance hereunder impossible or impose an unconscionable burden upon one of the parties.

22. AUTHORITY. Each party warrants that it has the corporate or other organizational power and authority to execute, deliver and perform this Agreement. Each party further warrants that the execution, delivery and performance by it of the Agreement has been duly authorized and approved by all requisite action of the party's management and appropriate governing body.

23. E-VERIFY. E-Verify is the federal program operated by the United States Department of Homeland Security and other federal agencies, or any successor or equivalent program, used to verify the work authorization of newly hired employees pursuant to federal law. Contractor shall ensure that Contractor and any subcontractor performing work under this Agreement: (i) uses E-Verify if required to do so by North Carolina law; and (ii) otherwise complies with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes. A breach of this provision by Contractor will be considered a breach of this Agreement, which entitles Union to terminate this Agreement, without penalty, upon notice to Contractor.

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

UNION COUNTY

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

BLOSSMAN GAS OF NORTH CAROLINA,
INC.

BY: _____(SEAL)

Approved as to Legal Form CAM

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

Deputy Finance Officer

Exhibit A
Insurance Requirements

I. BASIC INSURANCE REQUIREMENTS. At Contractor's sole expense, Contractor shall procure and maintain the following minimum insurances with insurers authorized to do business in North Carolina and rated A-VII or better by A.M. Best, or as otherwise authorized by the Union County Risk Manager.

A. **WORKERS' COMPENSATION**
Statutory (coverage for three or more employees) limits covering all employees, including Employer's Liability with limits of:

\$500,000	Each Accident
\$500,000	Disease - Each Employee
\$500,000	Disease - Policy Limit

B. **COMMERCIAL GENERAL LIABILITY**
Covering all operations involved in this Agreement.

\$2,000,000	General Aggregate
\$2,000,000	Products/Completed Operations Aggregate
\$1,000,000	Each Occurrence
\$1,000,000	Personal and Advertising Injury Limit

C. **COMMERCIAL AUTOMOBILE LIABILITY**

\$1,000,000	Combined Single Limit - Any Auto
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D. **POLLUTION LIABILITY INSURANCE**

\$1,000,000	Claims Made
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Contractor shall provide evidence of continuation or renewal of Pollution Liability Insurance for a period of two (2) years following termination of the Agreement.

II. ADDITIONAL INSURANCE REQUIREMENTS.

A. The Contractor's General Liability policy shall be endorsed, specifically or generally, to include the following as Additional Insured:

UNION COUNTY, ITS OFFICERS, AGENTS AND EMPLOYEES ARE INCLUDED AS ADDITIONAL INSURED WITH RESPECT TO THE GENERAL LIABILITY INSURANCE POLICY.

- B. Before commencement of any work or event, Contractor shall provide a Certificate of Insurance in satisfactory form as evidence of the insurances required above.
- C. Contractor shall have no right of recovery or subrogation against Union County (including its officers, agents and employees).
- D. It is the intention of the parties that the insurance policies afforded by Contractor shall protect both parties and be primary and non-contributory coverage for any and all losses covered by the above-described insurance.
- E. Union County shall have no liability with respect to Contractor's personal property whether insured or not insured. Any deductible or self-insured retention is the sole responsibility of Contractor.
- F. Notwithstanding the notification requirements of the Insurer, Contractor hereby agrees to notify County's Risk Manager at 500 North Main Street, Monroe, NC 28112, within two (2) days of the cancellation or substantive change of any insurance policy set out herein. Union, in its sole discretion, may deem failure to provide such notice as a breach of this Agreement.
- G. The Certificate of Insurance should note in the Description of Operations the following:
 - Department: Transportation
 - Contract #: 9365
- H. Insurance procured by Contractor shall not reduce nor limit Contractor's contractual obligation to indemnify, save harmless and defend Union County for claims made or suits brought which result from or are in connection with the performance of this Agreement.
- I. Certificate Holder shall be listed as follows:
 - Union County
 - Attention: Risk Manager
 - 500 North Main Street
 - Monroe, NC 28112
- J. If Contractor is authorized to assign or subcontract any of its rights or duties hereunder and in fact does so, Contractor shall ensure that the assignee or subcontractor satisfies all requirements of this Agreement, including, but not limited to, maintenance of the required insurances coverage and provision of certificate(s) of insurance and additional insured endorsement(s), in proper form prior to commencement of services.

10 APPENDIX A – BID FORM

IFB No. 2025-012 Transportation Propane Pump and Fueling System

SUBMIT WITH BID

Company Name: Blossman Gas

Bidder agrees to perform all work described in the Bidding Documents for the unit prices set forth in the Bid tabulation. Each Bidder must acknowledge that subcontractors are only to be used with the express written permission of Union County. The pricing shall include all costs to the contractor including, without limitation, fuel, travel, transport, hauling, permits, overhead, profit, taxes, insurance, lube, and service requirements, etc. as described in this solicitation. Bidder acknowledges that quantities are approximate only and are given as the basis for comparison of Bids.

This Bid form must be completed in its entirety, signed by an executive of the company that has authority to contract with Union County, NC, and submitted with bid. Failure to complete the following form shall result in your Bid being deemed nonresponsive and rejected without any further evaluation.

Description	Cost per Gallon	Unit/Day/ Gallons	Total Cost
1000-gallon propane tank with a data management program that can provide real-time information on propane levels. The tank must include a dispensing system and all required equipment including but not limited to tanks, cylinders, racks, pumps, scales, hoses, filters etc. <i>The contractor will retain ownership of propane tank, data management program and equipment.</i>		1 Unit	\$0 ⁰⁰
Training and refresher training for staff.		1 Day	\$0 ⁰⁰
Propane Fuel - Enter the proposed fixed rate over the BPN for Union County NC. This rate will remain the same for the initial contract term of 2 years.	\$1.199	24,000 Gallons	\$35,976 ⁰⁰
Total Bid:			\$35,976 ⁰⁰

Provide the Following Information

Alternative site with same or similar capabilities for refueling within 10 miles from main refueling location.

Union Co Schools

Bob-tail refueling Yes No

optional: as needed

APPENDIX A – BID FORM (CONTINUED)

Bid Package Checklist

Appendix A - Bid Form (signed)

Appendix B - Bid Submission Form (signed)

Appendix C - Addendum and Anti-Collusion form (signed)

Appendix D – FTA Forms – As applies to bid.

Evidence of authority to do business in the State of North Carolina

Project References

Proposed Subcontractor(s) List

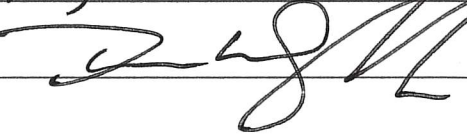
Representative Name:

Darrin Shaffer

Representative Title:

Regional Vice President

Representative Signature:

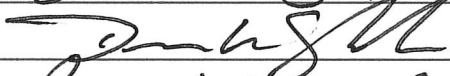


11 APPENDIX B – BID SUBMISSION FORM

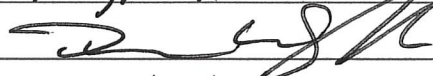
IFB No. 2025-012 Transportation Propane Pump and Fueling System

SUBMIT WITH BID

This Bid is submitted by:

Company Legal Name: Blossman Gas
Representative Name: Darrin Shaffer
Representative Signature: 
Representative Title: Regional Vice President
Address: 6109 Wilkinson Blvd
City/State/Zip: Belmont, NC 28012
Email Address: dshaffer@blossmangas.com
Phone Number: 336-300-0897
Website Address: www.blossmangas.com

It is understood that Union County reserves the right to reject any and all Bids, to make awards according to the best interest of the County, to waive formalities, technicalities, to recover and re-bid this project. Bid is valid for 120 calendar days from the Bid due date and is submitted by an executive of the company that has authority to contract with Union County, NC.

Name: Darrin Shaffer
Title: Regional Vice President
Signature: 
Date: 11/8/24

12 APPENDIX C – ADDENDUM AND ANTI-COLLUSION FORM


IFB No. 2025-012 Transportation Propane Pump and Fueling System

SUBMIT WITH BID

Please acknowledge receipt of all addenda by including this form with your Bid. Any questions or changes received will be posted as an addendum on www.co.union.nc.us and/or <https://evp.nc.gov>. It is your responsibility to check for this information.

Addendum No.	Date Downloaded
<u>1-IFB-2025-012</u>	<u>11/5/24</u>
_____	_____
_____	_____
_____	_____

I certify that this Bid is made in good faith and without collusion with any other offeror or officer or employee of Union County.

Company Name: Blossmen Gas
Name: Darin Sheffer
Title: Regional Vice President
Email Address: dshaffer@blossmengas.com
Signature: 
Date: 11/8/24

ATTACHMENT A

CERTIFICATION REGARDING LOBBYING

(To be submitted with all bids exceeding \$250,000.)

The undersigned Darrin Sheffer certifies, to the best of his or her knowledge and belief, that:
(Contractor)

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any persons for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding to any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions [as amended by "Government wide Guidance for New Restrictions on Lobbying," 61 Fed. Reg. 1413 (1/19/96). Note: language in paragraph (2) herein has been modified in accordance with Section 10 of the Lobbying Disclosure Act of 1995 (PL 104-65, to be codified at 2 U.S.C. 1601, et seq.)]
3. The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance is placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transactions imposed by 31, U.S.C. 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$250,000 for each such failure.

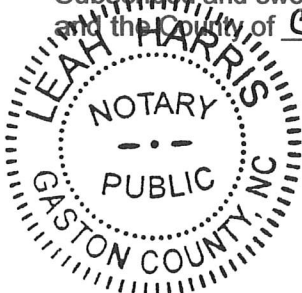
[Note: Pursuant to 31 U.S.C. 1352(c)(1)-(2)(A), any person who makes a prohibited expenditure or fails to file or amend a required certification or disclosure form shall be subject to a civil penalty of not less than \$10,000 for each such expenditure or failure.]

The Contractor, Darrin Sheffer, certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. Section A 3801 et seq., apply to this certification and disclosure, if any.

11/8/24
Date

[Signature]
Signature of Contractor's Authorized Official
Darrin Sheffer Regional Vice President
Name and Title of Contractors Authorized Official

Subscribed and sworn to before me this 8 day of November, 2024 in the State of North Carolina and the County of Gaston.



Notary Public [Signature]
My Appointment Expires 05/02/2029

ATTACHMENT B

CERTIFICATE OF COMPLIANCE
WITH BUY AMERICA REQUIREMENTS

(To be submitted with all bids exceeding \$250,000. A bid, which does not include this certification or the certification under Attachment C, will not be eligible for award.)

The bidder or offeror hereby certifies that it will meet the requirements of 49 U.S.C. 5323(j)(1) and the applicable regulations in 49 C.F.R. Part 661.

DATE 11/01/24
SIGNATURE [Signature]
COMPANY Blossman Co
NAME Darrin Sheffer
TITLE Regional Vice President

State of North Carolina

County of Gaston

Subscribed and sworn to before me this 8 day of November, 2024

Notary Public [Signature]

My Appointment Expires 05/02/2029



ATTACHMENT C

CERTIFICATE OF NON-COMPLIANCE
WITH BUY AMERICA REQUIREMENTS

N/A

(To be submitted with all bids exceeding \$250,000. A bid, which does not include this certification or the certification under Attachment B, will not be eligible for award.)

The bidder hereby certifies that it cannot comply with the requirements of 49 U.S.C. Section 5323(j), but it may qualify for an exception pursuant to 49 U.S.C. 5323(j)(2), as amended, and the applicable regulation in 49 CFR Part 661.7.

DATE _____

SIGNATURE _____

COMPANY _____

NAME _____

TITLE _____

State of _____

County of _____

Subscribed and sworn to before me this ____ day of _____, 20__.

Notary Public _____

My Appointment Expires _____

ATTACHMENT D

CERTIFICATION REGARDING DEBARMENT, SUSPENSION,
INELIGIBILITY and VOLUNTARY EXCLUSION
LOWER TIER COVERED TRANSACTION

(To be submitted with all bids exceeding \$25,000.)

- (1) The prospective lower tier participant (Bidder/Contractor) certifies, by submission of this bid or proposal, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- (2) Where the prospective lower tier participant (Bidder/Contractor) is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

The lower tier participant (Bidder/Contractor), Blossman Gas, certifies or affirms the truthfulness and accuracy of this statement of its certification and disclosure, if any.

SIGNATURE [Signature]
 TITLE Regional Vice President
 COMPANY Blossman Gas
 DATE 11/8/24

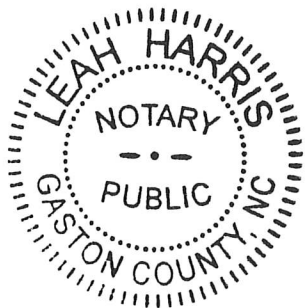
State of North Carolina

County of Gaston

Subscribed and sworn to before me this 8 day of November, 2024

Notary Public [Signature]

My Appointment Expires 05/02/2029



ATTACHMENT E

STATE OF NORTH CAROLINA
COUNTY OF Gaston

AFFIDAVIT OF COMPLIANCE WITH N.C. E-VERIFY STATUTES

(To be submitted with all bids)

I, Darrin Sheffer (hereinafter the "Affiant"), duly authorized by and on behalf of Blossman Gas (hereinafter the "Employer") after being first duly sworn deposes and says as follows:

1. I am the Vice President (President, Manager, CEO, etc.) of the Employer and possess the full authority to speak for and on behalf of the Employer identified above.
2. Employer understands that "E-Verify" means the federal E-Verify program operated by the United States Dept. 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.
3. Employer employs 25 or more employees, and is in compliance with the provisions of N.C. General Statute §64-26. Employer has verified the work authorization of its employees through E-Verify and shall retain the records of verification for a period of at least one year.
- Employer employs fewer than 25 Employees and is therefore not subject to the provisions of N.C. General Statute §64-26.
4. All subcontractors engaged by or to be engaged by Employer have or will have likewise complied with the provisions of N.C. General Statute §64-26.
5. Employer shall keep the State of North Carolina informed of any change in its status pursuant to Article 2 of Chapter 64 of the North Carolina Statutes.

This 8th day of November, 2024.

[Signature]
Signature of Affiant
Darrin Sheffer RVP
Printed Name and Title

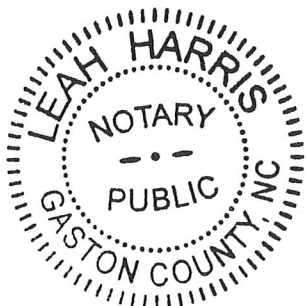
State of North Carolina

County of Gaston

Subscribed and sworn to before me this 8 day of November, 2024

Notary Public [Signature]

My Appointment Expires 05/02/2029



30

Specifications

5 BACKGROUND

Union County Transportation is moving towards reducing our carbon imprint on the County. To do this we are converting our vehicles to Bi-Fuel (gas/propane). Converting our vehicles will also be a cost-effective alternative for our operations. With the conversion of our vehicles, we will need to add one propane pump at our facility to fuel our vehicles with the option to add two more in the county. We currently have 6 vehicles converted with another 8 planned for 2025. We will continue to convert our vehicles each year as we replace vehicles that have met useful life.

6 SCOPE

The successful contractor must adhere to and/or provide the following:

- (1) 1000-gallon propane tank with a data management program that can provide real-time information on propane levels. The tank must include a dispensing system and all required equipment including but not limited to tanks, cylinders, racks, pumps, scales, hoses, filters, etc. ***The awarded Contractor will retain ownership of the propane tank, data management program and equipment.***
- The pump must record the vehicle number, mileage, date and time, name of driver, and amount of fuel.
- Emergency Options:
 - First alternative site with same or similar capabilities for refueling within 10 miles from main refueling location.
 - Bob-tail refueling as an emergency option.
- Propane gas delivery.
- Fuel Branch/Office within 1 hour of the designated site.
- Emergency contacts from local Branch.
- Maintenance for the propane tank, dispensing system and all required equipment at no additional charge.
- Provide the required service and maintenance for propane infrastructure in a timely manner.
- Training and refresher training to the staff.
- Estimated usage of 24,000 gallons per year with a 20% variance up or down.

6.1 PROPANE DELIVERY REQUIREMENTS

Service must be prompt and dependable. The fuel contractor will be responsible for ongoing management, including:

- All deliveries shall conform in every respect with all applicable laws of the State of North Carolina and/or Federal law and/or the County.
- Monitoring fuel levels and providing auto-replenish orders and delivery.
- Providing an emergency means of fueling vehicles should a site be down for more than two (2) consecutive days.
- Bidder will provide Union County with a 30 minute notification prior to driver delivery.
- All deliveries shall be guaranteed within twenty-four (24) hours of receipt of order or notification.
- Deliveries are to be made by metered trucks and delivery slips shall be stamped by the metering device indicating the amount of proact delivered at each delivery.

- Deliveries shall be made between the hours of 8:00 am and 5:00 pm, Monday thru Friday, excluding holidays.
- Deliveries shall be made to the Union County Progress Building, 1407 Airport Road, Monroe, NC 28110.
- Weekly delivery will be required for the duration of the contract.
- Bids shall include all delivery and/or freight charges to the address specified in this document. No additional freight shall be charged at time of delivery. Risk of loss and/or damage shall be upon the contractor until such time as goods have been physically delivered and received by the County.

6.2 ESTIMATED QUANTITIES

Union County currently operates approximately 6 propane vehicles with an estimated propane usage of 24,000 gallons. The amount estimated could change as routes change and additional propane vehicles are added to inventory.

The quantities listed are for the purpose of determining the low bid. It is not a guarantee of actual usage and is not meant to hold the County to a specific consumption. Actual usage required on the contract may be higher or lower than the number of gallons stated.

7 SPECIFICATIONS

7.1 PROPANE

The successful contractor must provide the following:

1. Best quality Propane.
2. All Propane's shall conform to regulations, which set certain specifications on fossil fuels, which may be burned within the State of North Carolina. Contractor must state the producer of fuel it intends to furnish, together with a certified statement of its analysis.
3. The contractor shall make deliveries of Propane, as directed and ordered into a propane tank at the specified locations. All goods must be delivered in first class condition. Deliveries found otherwise are subject to rejection and replacement. All dispensing equipment shall be in good repair to make deliveries without leaking propane at the points of delivery.
4. The Propane delivered hereunder may be regularly and continuously sampled or parts thereof may be sampled, as the County or their designee may elect. Samples may be collected, prepared, and analyzed by representatives of the County in accordance with methods adopted by the American Society for Testing Materials (ASTM).

7.2 MAINTENANCE

- Contractor must provide propane (Autogas) dispenser maintenance at least twice annually to ensure dispensing equipment is operating safely, efficiently, leak-free, and meets or exceeds all regulatory requirements. Maintenance is to be performed on all Autogas dispensers. Contractor is to provide this maintenance at no additional cost to the County and ensure that it is completed in a timely manner.

- Contractor must keep a minimum of one (1) compatible pump and one (1) compatible motor in stock at all times to ensure a quick replacement of pumps or motors as needed to keep the Autogas dispensers operational.
- Contractor must be able to provide this service themselves, not subcontract, and be able to be onsite within 4 hours.

7.3 TRAINING & SAFETY

- Contractor must provide onsite training to County employees on the proper handling of propane and the refueling of propane (Autogas) vehicles. Training must be documented, and refresher training must be offered twice annually as well as upon request from the County.

7.4 CUSTOMER SERVICE AND SUPPORT

- Contractor must be able to provide emergency service within 24 hours of notice by the County for all propane dispensing equipment.
- Contractor must have a live 24/7 answering service with trained on-call gas and service specialists available for response to all emergency service requests.
- Contractor will provide a single point of contact to handle all communications, conflict resolutions, billing issues, fueling issues, and data management functions. It is highly preferred for the contact person to have knowledge of vehicle conversion programs for new and existing vehicles. For example, support of new vehicle platforms, EPA certifications, warranty, and technical support for conversion systems. The point of contact must also be able to provide emergency contacts from the local branch and other departments servicing the County's account
- Contractor should provide regular vehicle emissions reductions data to the County detailing the actual impact of running Autogas in fleet vehicles.

7.5 DEVIATIONS

Any deviations from specifications and requirements herein must be clearly pointed out by bidder. Otherwise, it will be considered that products offered will be in strict compliance with these specifications and requirements, and successful bidder will be held responsible therefor. Deviations must be explained in detail on an attached sheet. However, no implication is made by Union County that deviations will be acceptable. Bidder is advised that the response (or lack thereof) on this question does not take precedence over specific responses or non-responses provided elsewhere in this bid.

7.6 REFERENCES

Provide with bid a list of project references to include name of company, contact name, phone number and email address, name of project.



Union County, NC

Staff Report

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

File #: 25-013

Agenda Date: 1/21/2025

TITLE:

November 2024 NCVTS Motor Vehicle Tax Report

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve the November 2024 NCVTS Motor Vehicle Tax Refund Report.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

\$2,751.82



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change															
ANDREWS, DAVID BRENDAN	ANDREWS, DAVID BRENDAN		5416 MACROON CT		MATTHEWS, NC 28104	Adjustment >=\$100	0080592207	L8W4787	PENDING	973226664	Refund Generated due to adjustment on Bill #0080592207-2024-2024-0000	Situs error	11/5/2024		001	TAX	\$0.00	\$0.00	\$0.00															
															200	TAX	(\$195.02)	\$0.00	(\$195.02)															
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)															
															700	TAX	\$83.83	\$0.00	\$83.83															
															023	TAX	\$19.87	\$0.00	\$19.87															
															003	TAX	\$0.00	\$0.00	\$0.00															
															005	TAX	\$0.00	\$0.00	\$0.00															
															004	TAX	\$0.00	\$0.00	\$0.00															
															002	TAX	\$0.00	\$0.00	\$0.00															
															Refund																	\$121.32		
BRADY, FRANCINE CAROL	BRADY, FRANCINE CAROL		7011 BRUSH CRK		MONROE, NC 28110	Adjustment >=\$100	0080665342	VEP3813	PENDING	865052144	Refund Generated due to adjustment on Bill #0080665342-2024-2024-0000	Situs error	11/4/2024		001	TAX	\$0.00	\$0.00	\$0.00															
															200	TAX	(\$171.60)	\$0.00	(\$171.60)															
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)															
															015	TAX	\$18.85	\$0.00	\$18.85															
															003	TAX	\$0.00	\$0.00	\$0.00															
															005	TAX	\$0.00	\$0.00	\$0.00															
															004	TAX	\$0.00	\$0.00	\$0.00															
															002	TAX	\$0.00	\$0.00	\$0.00															
															Refund																	\$182.75		
															CHOW, JONATHAN CHARLES	CHOW, JONATHAN CHARLES		405 GASEBURG DR		MONROE, NC 28110	Adjustment >=\$100	0080571577	AFT7475	PENDING	864170208	Refund Generated due to adjustment on Bill #0080571577-2024-2024-0000	Situs error	11/1/2024		001	TAX	\$0.00	\$0.00	\$0.00
200	TAX	(\$195.02)	\$0.00	(\$195.02)																														
200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)																														
019	TAX	\$24.76	\$0.00	\$24.76																														
003	TAX	\$0.00	\$0.00	\$0.00																														
005	TAX	\$0.00	\$0.00	\$0.00																														
004	TAX	\$0.00	\$0.00	\$0.00																														
002	TAX	\$0.00	\$0.00	\$0.00																														
Refund																														\$200.26				
CRAINER, SUSAN MARY	CRAINER, SUSAN MARY		5301 BERRYWOOD LN		WESLEY CHAPEL, NC 28110	Adjustment >=\$100	0080514800	VEF1568	PENDING	973227105	Refund Generated due to adjustment on Bill #0080514800-2024-2024-0000	Situs error	11/5/2024																	001	TAX	\$0.00	\$0.00	\$0.00
															200	TAX	(\$230.66)	\$0.00	(\$230.66)															
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)															
															970	TAX	\$7.57	\$0.00	\$7.57															
															026	TAX	\$18.27	\$0.00	\$18.27															
															003	TAX	\$0.00	\$0.00	\$0.00															
															005	TAX	\$0.00	\$0.00	\$0.00															
															004	TAX	\$0.00	\$0.00	\$0.00															
															002	TAX	\$0.00	\$0.00	\$0.00															
															Refund																	\$234.82		
HEINICKE, KEITH ROBERT	HEINICKE, KEITH ROBERT		10810 PARKHALL DR		HARRISBURG, NC 28075	Adjustment >=\$100	0080808107	CBE8991	PENDING	865090000	Refund Generated due to adjustment on Bill #0080808107-2024-2024-0000	Situs error	11/5/2024		001	TAX	\$0.00	\$0.00	\$0.00															
															200	TAX	(\$235.92)	\$0.00	(\$235.92)															
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)															
															015	TAX	\$25.92	\$0.00	\$25.92															
															003	TAX	\$0.00	\$0.00	\$0.00															
															005	TAX	\$0.00	\$0.00	\$0.00															
															004	TAX	\$0.00	\$0.00	\$0.00															
															002	TAX	\$0.00	\$0.00	\$0.00															
															Refund																	\$240.00		
															JAMES, ANGELIA NIKOLE	JAMES, ANGELIA NIKOLE	JAMES, TONY LAMAR	PO BOX 2596		MONROE, NC 28111	Adjustment >=\$100	0073242643	K8B1645	PENDING	758068339	Refund Generated due to adjustment on Bill #0073242643-2024-2024-0000-00	Over Assessment	#####		001	TAX	(\$16.82)	\$0.00	(\$16.82)
200	TAX	(\$51.78)	\$0.00	(\$51.78)																														
200	VEHICLE FEE	\$0.00	\$0.00	\$0.00																														
003	TAX	(\$1.81)	\$0.00	(\$1.81)																														
005	TAX	(\$0.40)	\$0.00	(\$0.40)																														
004	TAX	(\$3.01)	\$0.00	(\$3.01)																														
002	TAX	(\$38.56)	\$0.00	(\$38.56)																														
Refund																														\$112.38				
MARCHAM, MACY ANNE	MARCHAM, MACY ANNE		PO BOX 329		MINERAL SPRINGS, NC 28108	Adjustment >=\$100	0080075969	RAE4919	PENDING	865090664	Refund Generated due to adjustment on Bill #0080075969-2024-2024-0000	Situs error	11/5/2024																	001	TAX	\$0.00	\$0.00	\$0.00
																														200	TAX	(\$240.90)	\$0.00	(\$240.90)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)															
															015	TAX	\$26.46	\$0.00	\$26.46															
															003	TAX	\$0.00	\$0.00	\$0.00															
															005	TAX	\$0.00	\$0.00	\$0.00															
															004	TAX	\$0.00	\$0.00	\$0.00															
															002	TAX	\$0.00	\$0.00	\$0.00															
															Refund																	\$244.44		
															MOSRO, JUSTIN KELL	MOSRO, JUSTIN KELL	MOSRO, JUAN LIU	3419 REA FOREST DR		CHARLOTTE, NC 28226	Adjustment >=\$100	0080390286	KJ37190	PENDING	973226601	Refund Generated due to adjustment on Bill #0080390286-2023-2023-0000	Situs error	11/5/2024		001	TAX	\$0.00	\$0.00	\$0.00
200	TAX	(\$224.22)	(\$11.21)	(\$235.43)																														
200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)																														
800	TAX	\$20.08	\$1.00	\$21.08																														
026	TAX	\$16.73	\$0.04	\$17.57																														
003	TAX	\$0.00	\$0.00	\$0.00																														
005	TAX	\$0.00	\$0.00	\$0.00																														
004	TAX	\$0.00	\$0.00	\$0.00																														
002	TAX	\$0.00	\$0.00	\$0.00																														
Refund																														\$226.78				



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
PANTO, ANDREW SCOTT	PANTO, ANDREW SCOTT		9507 BLACKGOLD CIR		WAXHAW, NC 28173	Adjustment >= \$100	0080947562	97964	PENDING	651660990	Refund Generated due to adjustment on Bill #0080947562-2024-2024-0000-00	Exempt Property	#####		001	TAX	(\$154.71)	\$0.00	(\$154.71)
															026	TAX	(\$37.73)	\$0.00	(\$37.73)
															003	TAX	(\$16.59)	\$0.00	(\$16.59)
															005	TAX	(\$3.70)	\$0.00	(\$3.70)
															004	TAX	(\$27.68)	\$0.00	(\$27.68)
															002	TAX	(\$354.74)	\$0.00	(\$354.74)
															Refund				
PIERRIE, RICHARD CHARLES	PIERRIE, RICHARD CHARLES	PIERRIE, TERESA ANN	6939 COLONIAL REA CT		CHARLOTTE, NC 28226	Adjustment >= \$100	0080826531	HK04698	PENDING	865090264	Refund Generated due to adjustment on Bill #0080826531-2024-2024-0000	Situs error	11/5/2024		001	TAX	\$0.00	\$0.00	\$0.00
															200	TAX	(\$205.97)	\$0.00	(\$205.97)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															015	TAX	\$22.63	\$0.00	\$22.63
															003	TAX	\$0.00	\$0.00	\$0.00
															005	TAX	\$0.00	\$0.00	\$0.00
															004	TAX	\$0.00	\$0.00	\$0.00
002	TAX	\$0.00	\$0.00	\$0.00															
Refund					\$213.34														
VEGA CALDERON, SANTIAGO	VEGA CALDERON, SANTIAGO		6720 HILL GROVE ROAD		INDIAN TRAIL, NC 28079	Adjustment >= \$100	0080667516	LDP2986	PENDING	865052184	Refund Generated due to adjustment on Bill #0080667516-2024-2024-0000	Situs error	11/4/2024		001	TAX	\$0.00	\$0.00	\$0.00
															200	TAX	(\$221.05)	\$0.00	(\$221.05)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															023	TAX	\$22.52	\$0.00	\$22.52
															003	TAX	\$0.00	\$0.00	\$0.00
															005	TAX	\$0.00	\$0.00	\$0.00
															004	TAX	\$0.00	\$0.00	\$0.00
002	TAX	\$0.00	\$0.00	\$0.00															
Refund					\$228.53														
WEHRLE, MICHAEL ALLEN	WEHRLE, MICHAEL ALLEN		8022 BRUCE ST		CHARLOTTE, NC 28215	Adjustment >= \$100	0080807216	KMC4582	PENDING	865089960	Refund Generated due to adjustment on Bill #0080807216-2024-2024-0000	Situs error	11/5/2024		001	TAX	\$0.00	\$0.00	\$0.00
															200	TAX	(\$136.23)	\$0.00	(\$136.23)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															028	TAX	\$14.18	\$0.00	\$14.18
															003	TAX	\$0.00	\$0.00	\$0.00
															005	TAX	\$0.00	\$0.00	\$0.00
															004	TAX	\$0.00	\$0.00	\$0.00
002	TAX	\$0.00	\$0.00	\$0.00															
Refund					\$152.05														
																	Refund Total		\$2751.82



Union County, NC

Staff Report

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

File #: 25-017

Agenda Date: 1/21/2025

TITLE:

FY2024-25 Tax Bill Correction Report for December 2024

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve FY 2024-25 Tax Bill Correction Reports for December 2024.

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:

December Refund amount = \$398.07

Correction Listing Report

Union County

Date Posted between 12/1/2024 and 12/31/2024

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2024003059	01057005A	RE	2024	AUSTIN, WILLIAM G TRUSTEE	12/4/2024	Value	467,300	486,830	19,530		PUV ROLLBACK
Public Notes:						Tax	3,022.50	3,148.82	126.32		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,022.50	3,148.82	126.32	0.00	
2024003059	01057005A	RE	2023	AUSTIN, WILLIAM G TRUSTEE	12/4/2024	Value	467,300	486,830	19,530		PUV ROLLBACK
Public Notes:						Tax	2,927.17	3,049.51	122.34		
						LL	0.00	0.00	0.00		
						INT	0.00	12.54	12.54		
						Tax TTL	2,927.17	3,062.05	134.88	0.00	
2024003059	01057005A	RE	2022	AUSTIN, WILLIAM G TRUSTEE	12/4/2024	Value	467,300	486,830	19,530		PUV ROLLBACK
Public Notes:						Tax	2,927.17	3,049.51	122.34		
						LL	0.00	0.00	0.00		
						INT	0.00	23.55	23.55		
						Tax TTL	2,927.17	3,073.06	145.89	0.00	
2024003059	01057005A	RE	2021	AUSTIN, WILLIAM G TRUSTEE	12/4/2024	Value	467,300	486,830	19,530		PUV ROLLBACK
Public Notes:						Tax	2,932.78	3,055.35	122.57		
						LL	0.00	0.00	0.00		
						INT	0.00	34.62	34.62		
						Tax TTL	2,932.78	3,089.97	157.19	0.00	
2024003128	02049005	RE	2024	EDWARDS, KERRI BARTEL & EDWARDS, JARROD	12/30/2024	Value	12,700	15,260	2,560		PUV ROLLBACK
Public Notes:						Tax	84.03	100.97	16.94		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	84.03	100.97	16.94	0.00	
2024003128	02049005	RE	2023	EDWARDS, KERRI BARTEL & EDWARDS, JARROD	12/30/2024	Value	15,100	17,660	2,560		PUV ROLLBACK
Public Notes:						Tax	98.92	115.69	16.77		
						LL	0.00	0.00	0.00		
						INT	0.00	1.72	1.72		
						Tax TTL	98.92	117.41	18.49	0.00	

Correction Listing Report

Union County

Date Posted between 12/1/2024 and 12/31/2024

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2024003128	02049005	RE	2022	EDWARDS, KERRI BARTEL & EDWARDS, JARROD	12/30/2024	Value	15,100	17,660	2,560		PUV ROLLBACK
						Tax	98.92	115.69	16.77		
						LL	0.00	0.00	0.00		
						INT	0.00	3.23	3.23		
						Tax TTL	98.92	118.92	20.00	0.00	
Public Notes:											
2024003128	02049005	RE	2021	EDWARDS, KERRI BARTEL & EDWARDS, JARROD	12/30/2024	Value	15,100	17,660	2,560		PUV ROLLBACK
						Tax	98.52	115.22	16.70		
						LL	0.00	0.00	0.00		
						INT	0.00	4.71	4.71		
						Tax TTL	98.52	119.93	21.41	0.00	
Public Notes:											
2024003054	02129008	RE	2024	WOODWARD, DAWN & WOODWARD, MELVIN	12/3/2024	Value	9,800	14,030	4,230		PUV ROLLBACK
						Tax	65.46	93.72	28.26		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	65.46	93.72	28.26	0.00	
Public Notes:											
2024003054	02129008	RE	2023	WOODWARD, DAWN & WOODWARD, MELVIN	12/3/2024	Value	9,800	14,030	4,230		PUV ROLLBACK
						Tax	64.38	92.17	27.79		
						LL	0.00	0.00	0.00		
						INT	0.00	2.85	2.85		
						Tax TTL	64.38	95.02	30.64	0.00	
Public Notes:											
2024003054	02129008	RE	2022	WOODWARD, DAWN & WOODWARD, MELVIN	12/3/2024	Value	9,800	14,030	4,230		PUV ROLLBACK
						Tax	64.38	92.17	27.79		
						LL	0.00	0.00	0.00		
						INT	0.00	5.35	5.35		
						Tax TTL	64.38	97.52	33.14	0.00	
Public Notes:											
2024003054	02129008	RE	2021	WOODWARD, DAWN & WOODWARD, MELVIN	12/3/2024	Value	9,800	14,030	4,230		PUV ROLLBACK
						Tax	64.48	92.31	27.83		
						LL	0.00	0.00	0.00		
						INT	0.00	7.87	7.87		
						Tax TTL	64.48	100.18	35.70	0.00	
Public Notes:											

Correction Listing Report

Union County

Date Posted between 12/1/2024 and 12/31/2024

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2024003085	02211002B	RE	2024	MOORE, RONNIE & MOORE, DENISE	12/6/2024	Value	4,800	248,100	243,300		PUV ROLLBACK
Public Notes:						Tax	32.32	1,670.95	1,638.63		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	32.32	1,670.95	1,638.63	0.00	
2024003085	02211002B	RE	2023	MOORE, RONNIE & MOORE, DENISE	12/6/2024	Value	4,800	248,100	243,300		PUV ROLLBACK
Public Notes:						Tax	31.44	1,625.05	1,593.61		
						LL	0.00	0.00	0.00		
						INT	0.00	163.34	163.34		
						Tax TTL	31.44	1,788.39	1,756.95	0.00	
2024003085	02211002B	RE	2022	MOORE, RONNIE & MOORE, DENISE	12/6/2024	Value	4,800	248,100	243,300		PUV ROLLBACK
Public Notes:						Tax	31.44	1,625.05	1,593.61		
						LL	0.00	0.00	0.00		
						INT	0.00	306.77	306.77		
						Tax TTL	31.44	1,931.82	1,900.38	0.00	
2024003085	02211002B	RE	2021	MOORE, RONNIE & MOORE, DENISE	12/6/2024	Value	4,800	248,100	243,300		PUV ROLLBACK
Public Notes:						Tax	31.41	1,623.32	1,591.91		
						LL	0.00	0.00	0.00		
						INT	0.00	449.72	449.72		
						Tax TTL	31.41	2,073.04	2,041.63	0.00	
2024003088	03024006	RE	2024	CHAMBERS, EUGENE	12/13/2024	Value	1,000	6,400	5,400		PUV ROLLBACK
Public Notes:						Tax	6.53	41.84	35.31		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6.53	41.84	35.31	0.00	
2024003088	03024006	RE	2023	CHAMBERS, EUGENE	12/13/2024	Value	1,000	6,400	5,400		PUV ROLLBACK
Public Notes:						Tax	6.43	41.13	34.70		
						LL	0.00	0.00	0.00		
						INT	0.00	3.55	3.55		
						Tax TTL	6.43	44.68	38.25	0.00	

Correction Listing Report

Union County

Date Posted between 12/1/2024 and 12/31/2024

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2024003088	03024006	RE	2022	CHAMBERS, EUGENE	12/13/2024	Value	1,000	6,400	5,400		PUV ROLLBACK
Public Notes:						Tax	6.43	41.13	34.70		
						LL	0.00	0.00	0.00		
						INT	0.00	6.68	6.68		
						Tax TTL	6.43	47.81	41.38	0.00	
2024003088	03024006	RE	2021	CHAMBERS, EUGENE	12/13/2024	Value	1,000	6,400	5,400		PUV ROLLBACK
Public Notes:						Tax	6.45	41.27	34.82		
						LL	0.00	0.00	0.00		
						INT	0.00	9.84	9.84		
						Tax TTL	6.45	51.11	44.66	0.00	
2024003089	04231001B	RE	2023	MYERS, LARRY RUSSELL & MYERS, RONDA MITCHELL	12/16/2024	Value	74,150	129,880	55,730		PUV ROLLBACK
Public Notes:						Tax	460.40	806.43	346.03		
						LL	0.00	0.00	0.00		
						INT	0.00	35.47	35.47		
						Tax TTL	460.40	841.90	381.50	0.00	
2024003089	04231001B	RE	2022	MYERS, LARRY RUSSELL & MYERS, RONDA MITCHELL	12/16/2024	Value	74,150	129,880	55,730		PUV ROLLBACK
Public Notes:						Tax	460.40	806.43	346.03		
						LL	0.00	0.00	0.00		
						INT	0.00	66.61	66.61		
						Tax TTL	460.40	873.04	412.64	0.00	
2024003089	04231001B	RE	2021	MYERS, LARRY RUSSELL & MYERS, RONDA MITCHELL	12/16/2024	Value	40,450	96,180	55,730		PUV ROLLBACK
Public Notes:						Tax	253.42	602.57	349.15		
						LL	0.00	0.00	0.00		
						INT	0.00	98.63	98.63		
						Tax TTL	253.42	701.20	447.78	0.00	
2024003090	04231001E	RE	2024	TYSON, MALLORIE MYERS & TYSON, KELLY WAYNE	12/16/2024	Value	4,000	78,700	74,700		PUV ROLLBACK
Public Notes:						Tax	25.00	491.95	466.95		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	25.00	491.95	466.95	0.00	

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2024003091	05006022A	RE	2024	ARDREY, JOE M TRUSTEE	12/16/2024	Value	5,500	7,660	2,160		PUV ROLLBACK
Public Notes:						Tax	35.38	49.27	13.89		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	35.38	49.27	13.89	0.00	
2024003091	05006022A	RE	2023	ARDREY, JOE M TRUSTEE	12/16/2024	Value	5,500	7,660	2,160		PUV ROLLBACK
Public Notes:						Tax	34.89	48.59	13.70		
						LL	0.00	0.00	0.00		
						INT	0.00	1.40	1.40		
						Tax TTL	34.89	49.99	15.10	0.00	
2024003091	05006022A	RE	2022	ARDREY, JOE M TRUSTEE	12/16/2024	Value	5,500	7,660	2,160		PUV ROLLBACK
Public Notes:						Tax	34.89	48.59	13.70		
						LL	0.00	0.00	0.00		
						INT	0.00	2.63	2.63		
						Tax TTL	34.89	51.22	16.33	0.00	
2024003091	05006022A	RE	2021	ARDREY, JOE M TRUSTEE	12/16/2024	Value	5,500	7,660	2,160		PUV ROLLBACK
Public Notes:						Tax	34.67	48.28	13.61		
						LL	0.00	0.00	0.00		
						INT	0.00	3.84	3.84		
						Tax TTL	34.67	52.12	17.45	0.00	
2024003131	05039009A	RE	2024	FAWAZ, ZAKI HASSAN & FAWAZ, HASSAN ZAKI	12/30/2024	Value	8,600	29,930	21,330		PUV ROLLBACK
Public Notes:						Tax	54.88	191.01	136.13		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	54.88	191.01	136.13	0.00	
2024003131	05039009A	RE	2023	FAWAZ, ZAKI HASSAN & FAWAZ, HASSAN ZAKI	12/30/2024	Value	8,600	29,930	21,330		PUV ROLLBACK
Public Notes:						Tax	54.00	187.93	133.93		
						LL	0.00	0.00	0.00		
						INT	0.00	13.73	13.73		
						Tax TTL	54.00	201.66	147.66	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2024003131	05039009A	RE	2022	FAWAZ, ZAKI HASSAN & FAWAZ, HASSAN ZAKI	12/30/2024	Value	8,600	29,930	21,330		PUV ROLLBACK
Public Notes:						Tax	54.00	187.93	133.93		
						LL	0.00	0.00	0.00		
						INT	0.00	25.78	25.78		
						Tax TTL	54.00	213.71	159.71	0.00	
2024003131	05039009A	RE	2021	FAWAZ, ZAKI HASSAN & FAWAZ, HASSAN ZAKI	12/30/2024	Value	8,600	29,930	21,330		PUV ROLLBACK
Public Notes:						Tax	53.05	184.61	131.56		
						LL	0.00	0.00	0.00		
						INT	0.00	37.16	37.16		
						Tax TTL	53.05	221.77	168.72	0.00	
2024003050	05101018A	RE	2024	PH FARM LLC	12/2/2024	Value	13,000	41,970	28,970		PUV ROLLBACK
Public Notes:						Tax	82.96	267.85	184.89		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	82.96	267.85	184.89	0.00	
2024003050	05101018A	RE	2023	PH FARM LLC	12/2/2024	Value	13,000	41,970	28,970		PUV ROLLBACK
Public Notes:						Tax	81.63	263.53	181.90		
						LL	0.00	0.00	0.00		
						INT	0.00	18.65	18.65		
						Tax TTL	81.63	282.18	200.55	0.00	
2024003050	05101018A	RE	2022	PH FARM LLC	12/2/2024	Value	9,200	38,170	28,970		PUV ROLLBACK
Public Notes:						Tax	57.77	239.67	181.90		
						LL	0.00	0.00	0.00		
						INT	0.00	35.02	35.02		
						Tax TTL	57.77	274.69	216.92	0.00	
2024003050	05101018A	RE	2021	PH FARM LLC	12/2/2024	Value	9,200	38,170	28,970		PUV ROLLBACK
Public Notes:						Tax	56.75	235.44	178.69		
						LL	0.00	0.00	0.00		
						INT	0.00	50.48	50.48		
						Tax TTL	56.75	285.92	229.17	0.00	

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2024003086	05117029	RE	2024	GLENN, MARY LYNN ET AL & GLENN, DAVID ROLAND	12/11/2024	Value	300	26,000	25,700		PUV ROLLBACK
Public Notes:						Tax	1.92	166.48	164.56		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1.92	166.48	164.56	0.00	
2024003086	05117029	RE	2023	GLENN, MARY LYNN ET AL & GLENN, DAVID ROLAND	12/11/2024	Value	300	26,000	25,700		PUV ROLLBACK
Public Notes:						Tax	1.89	163.77	161.88		
						LL	0.00	0.00	0.00		
						INT	0.00	16.60	16.60		
						Tax TTL	1.89	180.37	178.48	0.00	
2024003086	05117029	RE	2022	GLENN, MARY LYNN ET AL & GLENN, DAVID ROLAND	12/11/2024	Value	300	26,000	25,700		PUV ROLLBACK
Public Notes:						Tax	1.89	163.77	161.88		
						LL	0.00	0.00	0.00		
						INT	0.00	31.16	31.16		
						Tax TTL	1.89	194.93	193.04	0.00	
2024003086	05117029	RE	2021	GLENN, MARY LYNN ET AL & GLENN, DAVID ROLAND	12/11/2024	Value	300	26,000	25,700		PUV ROLLBACK
Public Notes:						Tax	1.89	163.36	161.47		
						LL	0.00	0.00	0.00		
						INT	0.00	45.62	45.62		
						Tax TTL	1.89	208.98	207.09	0.00	
2024003051	08159003	RE	2024	GRIFFIN REAL ESTATE LLC	12/2/2024	Value	527,900	575,750	47,850		PUV ROLLBACK
Public Notes:						Tax	3,567.02	3,890.34	323.32		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,567.02	3,890.34	323.32	0.00	
2024003051	08159003	RE	2023	GRIFFIN REAL ESTATE LLC	12/2/2024	Value	527,900	575,750	47,850		PUV ROLLBACK
Public Notes:						Tax	3,533.77	3,854.08	320.31		
						LL	0.00	0.00	0.00		
						INT	0.00	32.84	32.84		
						Tax TTL	3,533.77	3,886.92	353.15	0.00	

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2024003051	08159003	RE	2022	GRIFFIN REAL ESTATE LLC	12/2/2024	Value	527,900	575,750	47,850		PUV ROLLBACK
Public Notes:						Tax	3,533.77	3,854.08	320.31		
						LL	0.00	0.00	0.00		
						INT	0.00	61.66	61.66		
						Tax TTL	3,533.77	3,915.74	381.97	0.00	
2024003051	08159003	RE	2021	GRIFFIN REAL ESTATE LLC	12/2/2024	Value	527,900	575,750	47,850		PUV ROLLBACK
Public Notes:						Tax	3,534.82	3,855.22	320.40		
						LL	0.00	0.00	0.00		
						INT	0.00	90.52	90.52		
						Tax TTL	3,534.82	3,945.74	410.92	0.00	
2024003052	09180004I	RE	2023	PLYLER, DOROTHY MOSER TRUS	12/3/2024	Value	813,850	902,200	88,350		PUV ROLLBACK
Public Notes:						Tax	8,875.04	9,838.50	963.46		
						LL	0.00	0.00	0.00		
						INT	0.00	98.76	98.76		
						Tax TTL	8,875.04	9,937.26	1,062.22	0.00	
2024003052	09180004I	RE	2022	PLYLER, DOROTHY MOSER TRUS	12/3/2024	Value	813,850	902,200	88,350		PUV ROLLBACK
Public Notes:						Tax	8,875.04	9,838.50	963.46		
						LL	0.00	0.00	0.00		
						INT	0.00	185.47	185.47		
						Tax TTL	8,875.04	10,023.97	1,148.93	0.00	
2024003052	09180004I	RE	2021	PLYLER, DOROTHY MOSER TRUS	12/3/2024	Value	813,850	902,200	88,350		PUV ROLLBACK
Public Notes:						Tax	8,875.04	9,838.50	963.46		
						LL	0.00	0.00	0.00		
						INT	0.00	272.18	272.18		
						Tax TTL	8,875.04	10,110.68	1,235.64	0.00	

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2024003053	09180004P	RE	2024	PLYLER, ALTON EUGENE	12/3/2024	Value	321,300	422,440	101,140		PUV ROLLBACK
Public Notes:						Tax	3,503.77	4,606.70	1,102.93		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,503.77	4,606.70	1,102.93	0.00	
Totals for Type PUV Rollback :						Value	7,158,800	9,371,000	2,212,200		
						Tax	58,741.11	74,724.25	15,983.14		
						LL	0.00	0.00	0.00		
						INT	0.00	2,260.55	2,260.55		
						Tax TTL	58,741.11	76,984.80	18,243.69	0.00	

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Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2024003093	658373	PP	2024	JOHNSON JEFFERS, RASHARD L	12/16/2024	Value	0	61,930	61,930		COUNTY TRANSFER
Public Notes:						Tax	0.00	403.66	403.66		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	403.66	403.66	0.00	
Totals for Type Value Change - Discovery :						Value	0	61,930	61,930		
						Tax	0.00	403.66	403.66		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	403.66	403.66	0.00	

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2024003100	04243001A	RE	2024	WILSON JR FREDERICK MARK R	12/18/2024	Value	121,800	98,700	(23,100)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	761.37	616.97	(144.40)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	761.37	616.97	(144.40)	0.00	
2024003087	08135009N	RE	2024	GRIFFIN, RICHARD S & ROSS, TAMMY A	12/12/2024	Value	6,100	0	(6,100)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	41.22	0.00	(41.22)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	41.22	0.00	(41.22)	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted	Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2024003060	08264007A	RE	2024	UNION ELECTRIC MEMBERSHIP	12/4/2024	Value	182,600	0	(182,600)	EXEMPTION STATUS CHANGE
Public Notes:						Tax	1,197.31	0.00	(1,197.31)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	1,197.31	0.00	(1,197.31)	
2024003106	2783804	PP	2024	BERRY GLOBAL FILMS LLC	12/18/2024	Value	44,801,173	44,801,173	0	LATE LIST PENALTY CHANGE
Public Notes:						Tax	384,170.06	384,170.06	0.00	
						LL	2,610.82	0.00	(2,610.82)	
						INT	0.00	0.00	0.00	
						Tax TTL	386,780.88	384,170.06	(2,610.82)	
2024003106	2783804	PP	2023	BERRY GLOBAL FILMS LLC	12/18/2024	Value	43,993,625	43,993,625	0	LATE LIST PENALTY CHANGE
Public Notes:						Tax	361,539.61	361,539.61	0.00	
						LL	7,392.19	0.00	(7,392.19)	
						INT	0.00	0.00	0.00	
						Tax TTL	368,931.80	361,539.61	(7,392.19)	
2024003106	2783804	PP	2022	BERRY GLOBAL FILMS LLC	12/18/2024	Value	41,409,291	41,409,291	0	LATE LIST PENALTY CHANGE
Public Notes:						Tax	340,301.55	340,301.55	0.00	
						LL	10,456.46	0.00	(10,456.46)	
						INT	0.00	0.00	0.00	
						Tax TTL	350,758.01	340,301.55	(10,456.46)	
2024003106	2783804	PP	2021	BERRY GLOBAL FILMS LLC	12/18/2024	Value	35,538,804	35,538,804	0	LATE LIST PENALTY CHANGE
Public Notes:						Tax	291,844.66	291,844.66	0.00	
						LL	12,778.19	0.00	(12,778.19)	
						INT	0.00	0.00	0.00	
						Tax TTL	304,622.85	291,844.66	(12,778.19)	
2024003106	2783804	PP	2020	BERRY GLOBAL FILMS LLC	12/18/2024	Value	28,692,694	28,692,694	0	LATE LIST PENALTY CHANGE
Public Notes:						Tax	287,127.79	287,127.79	0.00	
						LL	7,464.59	0.00	(7,464.59)	
						INT	0.00	0.00	0.00	
						Tax TTL	294,592.38	287,127.79	(7,464.59)	

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2024003106	2783804	PP	2019	BERRY GLOBAL FILMS LLC	12/18/2024	Value	29,318,286	29,318,286	0		LATE LIST
Public Notes:						Tax	292,039.45	292,039.45	0.00		PENALTY CHANGE
						LL	9,416.38	0.00	(9,416.38)		
						INT	0.00	0.00	0.00		
						Tax TTL	301,455.83	292,039.45	(9,416.38)	0.00	
2024003062	324220	PP	2024	CURLEE, BARRY WAYNE	12/5/2024	Value	25,784	23,049	(2,735)		SOLD PP ASSET
Public Notes:						Tax	166.77	149.08	(17.69)		
						LL	16.68	14.91	(1.77)		
						INT	0.00	0.00	0.00		
						Tax TTL	183.45	163.99	(19.46)	0.00	
2024003101	363504	PP	2024	MCVICKERS, KEITH BRIAN	12/18/2024	Value	10,025	1,000	(9,025)		SOLD PP ASSET
Public Notes:						Tax	83.89	8.37	(75.52)		
						LL	8.39	0.84	(7.55)		
						INT	0.00	0.00	0.00		
						Tax TTL	92.28	9.21	(83.07)	0.00	
2024003061	379055	PP	2024	RAUF, CLIFFORD FRANK III	12/5/2024	Value	24,525	19,861	(4,664)		SOLD PP ASSET
Public Notes:						Tax	158.63	128.46	(30.17)		
						LL	15.86	12.84	(3.02)		
						INT	0.00	0.00	0.00		
						Tax TTL	174.49	141.30	(33.19)	0.00	
2024003061	379055	PP	2023	RAUF, CLIFFORD FRANK III	12/5/2024	Value	25,816	20,906	(4,910)		SOLD PP ASSET
Public Notes:						Tax	161.71	130.96	(30.75)		
						LL	16.17	13.10	(3.07)		
						INT	0.00	0.00	0.00		
						Tax TTL	177.88	144.06	(33.82)	33.82	
2024003068	383213	PP	2024	RUSHING, KATHY W & RUSHING, ROCKY CANNON	12/5/2024	Value	10,270	9,521	(749)		SOLD PP ASSET
Public Notes:						Tax	69.39	64.33	(5.06)		
						LL	6.94	6.44	(0.50)		
						INT	0.00	0.00	0.00		
						Tax TTL	76.33	70.77	(5.56)	0.00	

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2024003063	385846	PP	2024	SHARP, JAMES ANDREW	12/5/2024	Value	903	0	(903)		SOLD PP ASSET
Public Notes:						Tax	9.85	0.00	(9.85)		
						LL	0.99	0.00	(0.99)		
						INT	0.00	0.00	0.00		
						Tax TTL	10.84	0.00	(10.84)	0.00	
2024003072	397186	PP	2024	TSITOURIS, DOROTHY K	12/5/2024	Value	995	0	(995)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	6.22	0.00	(6.22)		
						LL	0.62	0.00	(0.62)		
						INT	0.00	0.00	0.00		
						Tax TTL	6.84	0.00	(6.84)	0.00	
2024003108	399815	PP	2024	WALLACE, BOBBY JAMES	12/20/2024	Value	7,517	7,217	(300)		SOLD PP ASSET
Public Notes:						Tax	49.73	47.75	(1.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	49.73	47.75	(1.98)	1.98	
2024003104	407220	PP	2024	ARGOS USA LLC	12/18/2024	Value	901,967	878,790	(23,177)		SOLD PP ASSET
Public Notes:						Tax	7,454.76	7,263.20	(191.56)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,454.76	7,263.20	(191.56)	0.00	
2024003105	407622	PP	2024	BERRY PLASTICS CORPORATION	12/18/2024	Value	18,505,035	18,505,035	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	154,850.13	154,850.13	0.00		
						LL	4,704.71	0.00	(4,704.71)		
						INT	0.00	0.00	0.00		
						Tax TTL	159,554.84	154,850.13	(4,704.71)	0.00	
2024003105	407622	PP	2023	BERRY PLASTICS CORPORATION	12/18/2024	Value	19,777,492	19,777,492	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	163,203.86	163,203.86	0.00		
						LL	3,899.32	0.00	(3,899.32)		
						INT	0.00	0.00	0.00		
						Tax TTL	167,103.18	163,203.86	(3,899.32)	0.00	

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2024003105	407622	PP	2022	BERRY PLASTICS CORPORATION	12/18/2024	Value	13,765,509	13,765,509	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	111,128.95	111,128.95	0.00		
						LL	7,071.13	0.00	(7,071.13)		
						INT	0.00	0.00	0.00		
						Tax TTL	118,200.08	111,128.95	(7,071.13)	0.00	
2024003105	407622	PP	2021	BERRY PLASTICS CORPORATION	12/18/2024	Value	14,019,580	14,019,580	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	113,067.91	113,067.91	0.00		
						LL	9,383.70	0.00	(9,383.70)		
						INT	0.00	0.00	0.00		
						Tax TTL	122,451.61	113,067.91	(9,383.70)	0.00	
2024003105	407622	PP	2020	BERRY PLASTICS CORPORATION	12/18/2024	Value	13,304,275	13,304,275	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	128,918.42	128,918.42	0.00		
						LL	14,756.77	0.00	(14,756.77)		
						INT	0.00	0.00	0.00		
						Tax TTL	143,675.19	128,918.42	(14,756.77)	0.00	
2024003105	407622	PP	2019	BERRY PLASTICS CORPORATION	12/18/2024	Value	12,521,032	12,521,032	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	114,680.13	114,680.13	0.00		
						LL	15,567.65	0.00	(15,567.65)		
						INT	0.00	0.00	0.00		
						Tax TTL	130,247.78	114,680.13	(15,567.65)	0.00	
2024003099	407660	PP	2024	BIG LOTS STORES INC #5119	12/18/2024	Value	201,488	201,488	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	2,197.23	2,197.23	0.00		
						LL	219.72	0.00	(219.72)		
						INT	0.00	0.00	0.00		
						Tax TTL	2,416.95	2,197.23	(219.72)	0.00	
2024003110	408282	PP	2022	CAROLINAS STONE MARBLE & G	12/20/2024	Value	251,483	152,067	(99,416)		SOLD PP ASSET
Public Notes:						Tax	2,030.22	1,227.64	(802.58)		
						LL	509.36	268.59	(240.77)		
						INT	0.00	0.00	0.00		
						Tax TTL	2,539.58	1,496.23	(1,043.35)	0.00	

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2024003110	408282	PP	2021	CAROLINAS STONE MARBLE & G	12/20/2024	Value	195,633	129,184	(66,449)		SOLD PP ASSET
Public Notes:						Tax	1,577.78	1,041.87	(535.91)		
						LL	481.83	267.47	(214.36)		
						INT	0.00	0.00	0.00		
						Tax TTL	2,059.61	1,309.34	(750.27)	0.00	
2024003110	408282	PP	2020	CAROLINAS STONE MARBLE & G	12/20/2024	Value	116,992	70,446	(46,546)		SOLD PP ASSET
Public Notes:						Tax	1,133.65	682.62	(451.03)		
						LL	293.78	68.26	(225.52)		
						INT	0.00	0.00	0.00		
						Tax TTL	1,427.43	750.88	(676.55)	0.00	
2024003110	408282	PP	2019	CAROLINAS STONE MARBLE & G	12/20/2024	Value	114,527	81,690	(32,837)		SOLD PP ASSET
Public Notes:						Tax	1,048.95	748.20	(300.75)		
						LL	271.65	91.19	(180.46)		
						INT	0.00	0.00	0.00		
						Tax TTL	1,320.60	839.39	(481.21)	0.00	
2024003097	408949	PP	2024	CSI LEASING INC	12/16/2024	Value	216,702	216,702	0		CLERICAL ERROR
Public Notes:						Tax	2,363.14	2,363.14	0.00		
						LL	236.31	0.00	(236.31)		
						INT	0.00	0.00	0.00		
						Tax TTL	2,599.45	2,363.14	(236.31)	0.00	
2024003095	411293	PP	2024	BROAD, JOHN EDWARD III	12/16/2024	Value	24,003	383	(23,620)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	158.80	2.53	(156.27)		
						LL	15.88	0.26	(15.62)		
						INT	0.00	0.00	0.00		
						Tax TTL	174.68	2.79	(171.89)	0.00	
2024003095	411293	PP	2023	BROAD, JOHN EDWARD III	12/16/2024	Value	26,715	471	(26,244)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	175.01	3.09	(171.92)		
						LL	17.50	0.31	(17.19)		
						INT	0.00	0.00	0.00		
						Tax TTL	192.51	3.40	(189.11)	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2024003107	577672	PP	2024	SMITH, TARA M & THE CUPCAKE QUEEN LLC	12/20/2024	Value	2,193	0	(2,193)		BUSINESS CLOSED
Public Notes:						Tax	22.48	0.00	(22.48)		
						LL	2.25	0.00	(2.25)		
						INT	0.00	0.00	0.00		
						Tax TTL	24.73	0.00	(24.73)	0.00	
2024003069	578389	PP	2024	ALLEN, BRIAN LEE	12/5/2024	Value	6,392	3,143	(3,249)		SOLD PP ASSET
Public Notes:						Tax	41.34	20.33	(21.01)		
						LL	4.13	2.03	(2.10)		
						INT	0.00	0.00	0.00		
						Tax TTL	45.47	22.36	(23.11)	0.00	
2024003057	584507	PP	2024	REMIER TRANSPORTATION LLC	12/4/2024	Value	6,683	4,716	(1,967)		SOLD PP ASSET
Public Notes:						Tax	55.92	39.46	(16.46)		
						LL	5.59	3.95	(1.64)		
						INT	0.00	0.00	0.00		
						Tax TTL	61.51	43.41	(18.10)	0.00	
2024003057	584507	PP	2023	REMIER TRANSPORTATION LLC	12/4/2024	Value	7,035	4,964	(2,071)		SOLD PP ASSET
Public Notes:						Tax	58.05	40.96	(17.09)		
						LL	5.81	4.10	(1.71)		
						INT	0.00	0.00	0.00		
						Tax TTL	63.86	45.06	(18.80)	0.00	
2024003057	584507	PP	2022	REMIER TRANSPORTATION LLC	12/4/2024	Value	7,405	5,225	(2,180)		SOLD PP ASSET
Public Notes:						Tax	59.78	42.18	(17.60)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	59.78	42.18	(17.60)	0.00	
2024003067	585202	PP	2024	HINSON, ADAM HOYLE	12/5/2024	Value	19,400	2,606	(16,794)		SOLD PP ASSET
Public Notes:						Tax	125.48	16.86	(108.62)		
						LL	12.55	1.68	(10.87)		
						INT	0.00	0.00	0.00		
						Tax TTL	138.03	18.54	(119.49)	0.00	

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2024003109	587183	PP	2024	SUTTON, WESLEY CHASE	12/20/2024	Value	2,656	0	(2,656)		CLERICAL ERROR
Public Notes:						Tax	16.97	0.00	(16.97)		
						LL	1.70	0.00	(1.70)		
						INT	0.00	0.00	0.00		
						Tax TTL	18.67	0.00	(18.67)	0.00	
2024003055	588411	PP	2024	MCCANN, BRUCE ANTHONY JR	12/4/2024	Value	3,185	2,140	(1,045)		SOLD PP ASSET
Public Notes:						Tax	34.73	23.34	(11.39)		
						LL	3.47	2.34	(1.13)		
						INT	0.00	0.00	0.00		
						Tax TTL	38.20	25.68	(12.52)	0.00	
2024003065	588975	PP	2024	MATSEBURKA, PETR MIKHAYLOV	12/5/2024	Value	1,570	300	(1,270)		SOLD PP ASSET
Public Notes:						Tax	10.61	2.03	(8.58)		
						LL	1.06	0.20	(0.86)		
						INT	0.00	0.00	0.00		
						Tax TTL	11.67	2.23	(9.44)	0.00	
2024003103	595057	PP	2024	WILLIAMS, DANIEL HOUSTON	12/18/2024	Value	1,065	0	(1,065)		CLERICAL ERROR
Public Notes:						Tax	7.20	0.00	(7.20)		
						LL	0.72	0.00	(0.72)		
						INT	0.00	0.00	0.00		
						Tax TTL	7.92	0.00	(7.92)	0.00	
2024003103	595057	PP	2023	WILLIAMS, DANIEL HOUSTON	12/18/2024	Value	1,121	0	(1,121)		CLERICAL ERROR
Public Notes:						Tax	7.50	0.00	(7.50)		
						LL	0.75	0.00	(0.75)		
						INT	0.00	0.00	0.00		
						Tax TTL	8.25	0.00	(8.25)	0.00	
2024003103	595057	PP	2022	WILLIAMS, DANIEL HOUSTON	12/18/2024	Value	1,180	0	(1,180)		CLERICAL ERROR
Public Notes:						Tax	7.90	0.00	(7.90)		
						LL	0.79	0.00	(0.79)		
						INT	0.00	0.00	0.00		
						Tax TTL	8.69	0.00	(8.69)	0.00	

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2024003103	595057	PP	2021	WILLIAMS, DANIEL HOUSTON	12/18/2024	Value	1,180	0	(1,180)		CLERICAL ERROR
Public Notes:						Tax	7.90	0.00	(7.90)		
						LL	0.79	0.00	(0.79)		
						INT	0.00	0.00	0.00		
						Tax TTL	8.69	0.00	(8.69)	0.00	
2024003103	595057	PP	2020	WILLIAMS, DANIEL HOUSTON	12/18/2024	Value	1,180	0	(1,180)		CLERICAL ERROR
Public Notes:						Tax	9.39	0.00	(9.39)		
						LL	0.94	0.00	(0.94)		
						INT	0.00	0.00	0.00		
						Tax TTL	10.33	0.00	(10.33)	0.00	
2024003092	597135	PP	2024	WATTS, RYAN JAMES	12/16/2024	Value	8,312	0	(8,312)		TAXPAYER MOVED
Public Notes:						Tax	54.34	0.00	(54.34)		
						LL	5.43	0.00	(5.43)		
						INT	0.00	0.00	0.00		
						Tax TTL	59.77	0.00	(59.77)	0.00	
2024003092	597135	PP	2023	WATTS, RYAN JAMES	12/16/2024	Value	8,750	0	(8,750)		TAXPAYER MOVED
Public Notes:						Tax	56.23	0.00	(56.23)		
						LL	5.62	0.00	(5.62)		
						INT	0.00	0.00	0.00		
						Tax TTL	61.85	0.00	(61.85)	0.00	
2024003092	597135	PP	2022	WATTS, RYAN JAMES	12/16/2024	Value	9,210	0	(9,210)		TAXPAYER MOVED
Public Notes:						Tax	59.18	0.00	(59.18)		
						LL	5.92	0.00	(5.92)		
						INT	0.00	0.00	0.00		
						Tax TTL	65.10	0.00	(65.10)	0.00	
2024003092	597135	PP	2021	WATTS, RYAN JAMES	12/16/2024	Value	9,210	0	(9,210)		TAXPAYER MOVED
Public Notes:						Tax	59.39	0.00	(59.39)		
						LL	5.94	0.00	(5.94)		
						INT	0.00	0.00	0.00		
						Tax TTL	65.33	0.00	(65.33)	39.64	

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2024003102	599457	PP	2024	BARNETTE, JERRY WILKIE	12/18/2024	Value	2,644	0	(2,644)		TAXPAYER MOVED
Public Notes:						Tax	17.81	0.00	(17.81)		
						LL	1.78	0.00	(1.78)		
						INT	0.00	0.00	0.00		
						Tax TTL	19.59	0.00	(19.59)	0.00	
2024003102	599457	PP	2023	BARNETTE, JERRY WILKIE	12/18/2024	Value	2,784	0	(2,784)		TAXPAYER MOVED
Public Notes:						Tax	18.24	0.00	(18.24)		
						LL	1.82	0.00	(1.82)		
						INT	0.00	0.00	0.00		
						Tax TTL	20.06	0.00	(20.06)	51.96	
2024003102	599457	PP	2022	BARNETTE, JERRY WILKIE	12/18/2024	Value	2,930	0	(2,930)		TAXPAYER MOVED
Public Notes:						Tax	19.19	0.00	(19.19)		
						LL	1.92	0.00	(1.92)		
						INT	0.00	0.00	0.00		
						Tax TTL	21.11	0.00	(21.11)	25.01	
2024003102	599457	PP	2021	BARNETTE, JERRY WILKIE	12/18/2024	Value	2,930	0	(2,930)		TAXPAYER MOVED
Public Notes:						Tax	19.17	0.00	(19.17)		
						LL	1.92	0.00	(1.92)		
						INT	0.00	0.00	0.00		
						Tax TTL	21.09	0.00	(21.09)	26.89	
2024003084	600025	PP	2024	NAKAMURA, SUSAN LEE	12/5/2024	Value	4,520	0	(4,520)		SOLD PP ASSET
Public Notes:						Tax	28.85	0.00	(28.85)		
						LL	2.89	0.00	(2.89)		
						INT	0.00	0.00	0.00		
						Tax TTL	31.74	0.00	(31.74)	0.00	
2024003056	600316	PP	2024	PRIETO, ERNESTO CASTANON	12/4/2024	Value	928	0	(928)		SOLD PP ASSET
Public Notes:						Tax	10.12	0.00	(10.12)		
						LL	1.01	0.00	(1.01)		
						INT	0.00	0.00	0.00		
						Tax TTL	11.13	0.00	(11.13)	0.00	

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2024003064	600344	PP	2024	TOSOYEV, MURAT RAKHIMOVICH	12/5/2024	Value	11,664	5,832	(5,832)	SOLD PP ASSET
Public Notes:						Tax	94.80	47.40	(47.40)	
						LL	9.48	4.74	(4.74)	
						INT	0.00	0.00	0.00	
						Tax TTL	104.28	52.14	(52.14)	0.00
2024003066	601821	PP	2024	INTERSTATE TRANSPORT LLC	12/5/2024	Value	33,076	25,786	(7,290)	SOLD PP ASSET
Public Notes:						Tax	360.69	281.20	(79.49)	
						LL	36.07	28.12	(7.95)	
						INT	0.00	0.00	0.00	
						Tax TTL	396.76	309.32	(87.44)	0.00
2024003066	601821	PP	2023	INTERSTATE TRANSPORT LLC	12/5/2024	Value	35,640	27,540	(8,100)	SOLD PP ASSET
Public Notes:						Tax	388.65	300.32	(88.33)	
						LL	38.87	30.03	(8.84)	
						INT	0.00	0.00	0.00	
						Tax TTL	427.52	330.35	(97.17)	0.00
2024003081	604819	PP	2024	APPLIED TECHNICAL SERVICES	12/5/2024	Value	16,850	6,904	(9,946)	SOLD PP ASSET
Public Notes:						Tax	144.49	59.20	(85.29)	
						LL	14.45	5.92	(8.53)	
						INT	0.00	0.00	0.00	
						Tax TTL	158.94	65.12	(93.82)	0.00
2024003083	606070	PP	2024	BB CARGO LLC	12/5/2024	Value	1,958	0	(1,958)	SOLD PP ASSET
Public Notes:						Tax	16.14	0.00	(16.14)	
						LL	1.61	0.00	(1.61)	
						INT	0.00	0.00	0.00	
						Tax TTL	17.75	0.00	(17.75)	0.00
2024003083	606070	PP	2023	BB CARGO LLC	12/5/2024	Value	2,062	0	(2,062)	SOLD PP ASSET
Public Notes:						Tax	16.85	0.00	(16.85)	
						LL	1.69	0.00	(1.69)	
						INT	0.00	0.00	0.00	
						Tax TTL	18.54	0.00	(18.54)	0.00

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2024003080	606303	PP	2024	KIMBRELLS GRADING LLC	12/5/2024	Value	213,605	130,070	(83,535)	CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	1,418.76	863.92	(554.84)	
						LL	141.88	86.39	(55.49)	
						INT	0.00	0.00	0.00	
						Tax TTL	1,560.64	950.31	(610.33)	
2024003082	611357	PP	2024	EDGAR, HOPE FINCHER	12/5/2024	Value	4,355	0	(4,355)	SOLD PP ASSET
Public Notes:						Tax	27.22	0.00	(27.22)	
						LL	2.72	0.00	(2.72)	
						INT	0.00	0.00	0.00	
						Tax TTL	29.94	0.00	(29.94)	
2024003058	612892	PP	2024	UNDERWOOD, WILLIAM CHUCK	12/4/2024	Value	814	0	(814)	SOLD PP ASSET
Public Notes:						Tax	5.31	0.00	(5.31)	
						LL	0.53	0.00	(0.53)	
						INT	0.00	0.00	0.00	
						Tax TTL	5.84	0.00	(5.84)	
2024003112	613628	PP	2024	PEREIRA, LEONARDO FARIA	12/23/2024	Value	73,324	64,585	(8,739)	SOLD PP ASSET
Public Notes:						Tax	472.43	416.12	(56.31)	
						LL	47.24	41.61	(5.63)	
						INT	0.00	0.00	0.00	
						Tax TTL	519.67	457.73	(61.94)	
2024003070	613825	PP	2024	KAST TRANSPORT LLC	12/5/2024	Value	42,444	14,975	(27,469)	SOLD PP ASSET
Public Notes:						Tax	273.00	96.32	(176.68)	
						LL	27.30	9.64	(17.66)	
						INT	0.00	0.00	0.00	
						Tax TTL	300.30	105.96	(194.34)	
2024003070	613825	PP	2023	KAST TRANSPORT LLC	12/5/2024	Value	46,995	28,624	(18,371)	SOLD PP ASSET
Public Notes:						Tax	298.14	181.59	(116.55)	
						LL	29.81	18.15	(11.66)	
						INT	0.00	0.00	0.00	
						Tax TTL	327.95	199.74	(128.21)	

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2024003070	613825	PP	2022	KAST TRANSPORT LLC	12/5/2024	Value	51,042	30,630	(20,412)		SOLD PP ASSET
Public Notes:						Tax	323.81	194.32	(129.49)		
						LL	32.38	19.44	(12.94)		
						INT	0.00	0.00	0.00		
						Tax TTL	356.19	213.76	(142.43)	12.94	
2024003071	621615	PP	2024	LAFFITTE, BRANDON LEON	12/5/2024	Value	1,000	0	(1,000)		SOLD PP ASSET
Public Notes:						Tax	6.53	0.00	(6.53)		
						LL	0.65	0.00	(0.65)		
						INT	0.00	0.00	0.00		
						Tax TTL	7.18	0.00	(7.18)	0.00	
2024003079	625540	PP	2024	POPLIN, KELLY JOSEPH & POPLIN, MORGAN C	12/5/2024	Value	95,551	0	(95,551)		SOLD PP ASSET
Public Notes:						Tax	638.76	0.00	(638.76)		
						LL	63.88	0.00	(63.88)		
						INT	0.00	0.00	0.00		
						Tax TTL	702.64	0.00	(702.64)	0.00	
2024003073	625541	PP	2024	POPLIN, KELLY JOSEPH & POPLIN, MORGAN CARPENTE	12/5/2024	Value	5,415	0	(5,415)		SOLD PP ASSET
Public Notes:						Tax	36.20	0.00	(36.20)		
						LL	3.62	0.00	(3.62)		
						INT	0.00	0.00	0.00		
						Tax TTL	39.82	0.00	(39.82)	0.00	
2024003078	625546	PP	2024	DESANTIS, KAREN ANN & DESANTIS, GARY JOSEPH	12/5/2024	Value	4,930	0	(4,930)		SOLD PP ASSET
Public Notes:						Tax	41.25	0.00	(41.25)		
						LL	4.13	0.00	(4.13)		
						INT	0.00	0.00	0.00		
						Tax TTL	45.38	0.00	(45.38)	0.00	
2024003114	631086	PP	2024	YECKLEY, BRENDAN PAUL	12/23/2024	Value	29,806	0	(29,806)		CLERICAL ERROR
Public Notes:						Tax	187.12	0.00	(187.12)		
						LL	18.71	0.00	(18.71)		
						INT	0.00	0.00	0.00		
						Tax TTL	205.83	0.00	(205.83)	205.83	

Correction Listing Report

Union County

Date Posted between 12/1/2024 and 12/31/2024

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted	Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2024003098	631231	PP	2024	VUJICA, DALIBOR	12/16/2024	Value	7,761	0	(7,761)	SOLD PP ASSET
Public Notes:						Tax	66.37	0.00	(66.37)	
						LL	6.64	0.00	(6.64)	
						INT	0.00	0.00	0.00	
						Tax TTL	73.01	0.00	(73.01)	0.00
2024003076	631296	PP	2024	MUJUMDAR, RANGAN	12/5/2024	Value	22,139	0	(22,139)	SOLD PP ASSET
Public Notes:						Tax	226.99	0.00	(226.99)	
						LL	22.70	0.00	(22.70)	
						INT	0.00	0.00	0.00	
						Tax TTL	249.69	0.00	(249.69)	0.00
2024003075	646154	PP	2024	TKACH, JOHN	12/5/2024	Value	2,244	0	(2,244)	SOLD PP ASSET
Public Notes:						Tax	23.01	0.00	(23.01)	
						LL	2.30	0.00	(2.30)	
						INT	0.00	0.00	0.00	
						Tax TTL	25.31	0.00	(25.31)	0.00
2024003074	646264	PP	2024	SHIELDS, MARIANNE	12/5/2024	Value	7,600	0	(7,600)	TAXPAYER MOVED
Public Notes:						Tax	77.92	0.00	(77.92)	
						LL	7.79	0.00	(7.79)	
						INT	0.00	0.00	0.00	
						Tax TTL	85.71	0.00	(85.71)	0.00
2024003096	651570	PP	2024	CSI LEASING INC	12/16/2024	Value	690	690	0	CLERICAL ERROR
Public Notes:						Tax	4.61	4.61	0.00	
						LL	0.46	0.00	(0.46)	
						INT	0.00	0.00	0.00	
						Tax TTL	5.07	4.61	(0.46)	0.00
2024003120	652352	PP	2023	CASCO, ELIAS RIGOBERTO HER & HERNANDEZ, DORA SANCHEZ	12/27/2024	Value	2,729	0	(2,729)	DUPLICATE ASSESSMENT
Public Notes:						Tax	29.76	0.00	(29.76)	
						LL	0.00	0.00	0.00	
						INT	0.00	0.00	0.00	
						Tax TTL	29.76	0.00	(29.76)	0.00

Correction Listing Report

Union County

Date Posted between 12/1/2024 and 12/31/2024

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2024003122	652354	PP	2023	GARCIA, HUVER URIEL	12/27/2024	Value	1,265	0	(1,265)		DUPLICATE ASSESSMENT
Public Notes:						Tax	13.79	0.00	(13.79)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	13.79	0.00	(13.79)	0.00	
2024003116	652383	PP	2023	TMI SERVICES INC	12/27/2024	Value	23,740	0	(23,740)		DUPLICATE ASSESSMENT
Public Notes:						Tax	258.88	0.00	(258.88)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	258.88	0.00	(258.88)	0.00	
2024003115	652594	PP	2023	COREA HERNANDEZ, CARLOS MA	12/23/2024	Value	28,928	0	(28,928)		DUPLICATE ASSESSMENT
Public Notes:						Tax	182.85	0.00	(182.85)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	182.85	0.00	(182.85)	0.00	
2024003127	652595	PP	2023	BRUNO HIPOLITO, CARLOS	12/27/2024	Value	1,975	0	(1,975)		DUPLICATE ASSESSMENT
Public Notes:						Tax	16.14	0.00	(16.14)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	16.14	0.00	(16.14)	0.00	
2024003119	652598	PP	2023	BARRIOS, MAURO IVAN REYES	12/27/2024	Value	1,065	0	(1,065)		DUPLICATE ASSESSMENT
Public Notes:						Tax	11.61	0.00	(11.61)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	11.61	0.00	(11.61)	0.00	
2024003121	652601	PP	2023	RANDAZZO, KATHLEEN MARIE	12/27/2024	Value	4,500	0	(4,500)		DUPLICATE ASSESSMENT
Public Notes:						Tax	49.07	0.00	(49.07)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	49.07	0.00	(49.07)	0.00	

Correction Listing Report

Union County

Date Posted between 12/1/2024 and 12/31/2024

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2024003126	652606	PP	2023	SHEVCHENKO, MAKSIM ANATOLY	12/27/2024	Value	14,433	0	(14,433)		DUPLICATE ASSESSMENT
Public Notes:						Tax	91.23	0.00	(91.23)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	91.23	0.00	(91.23)	0.00	
2024003125	652611	PP	2023	MARSH-HAMMONDS, CHRISTIAN	12/27/2024	Value	2,690	0	(2,690)		DUPLICATE ASSESSMENT
Public Notes:						Tax	29.33	0.00	(29.33)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	29.33	0.00	(29.33)	0.00	
2024003118	652621	PP	2023	HELGUERA AGUILAR, LUIS	12/27/2024	Value	2,773	0	(2,773)		DUPLICATE ASSESSMENT
Public Notes:						Tax	30.24	0.00	(30.24)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	30.24	0.00	(30.24)	0.00	
2024003117	652622	PP	2023	THE STRACK CORPORATION	12/27/2024	Value	15,280	0	(15,280)		DUPLICATE ASSESSMENT
Public Notes:						Tax	97.55	0.00	(97.55)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	97.55	0.00	(97.55)	0.00	
2024003111	652626	PP	2023	CORTEZ MARBAN, MARLENE	12/23/2024	Value	1,604	0	(1,604)		DUPLICATE ASSESSMENT
Public Notes:						Tax	9.99	0.00	(9.99)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9.99	0.00	(9.99)	0.00	
2024003124	652634	PP	2023	MELCHOR VARGAS, HERMINIA S	12/27/2024	Value	4,534	0	(4,534)		DUPLICATE ASSESSMENT
Public Notes:						Tax	49.44	0.00	(49.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	49.44	0.00	(49.44)	0.00	

Correction Listing Report

Union County

Date Posted between 12/1/2024 and 12/31/2024

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2024003123	652637	PP	2023	MARTIN, CHARNAE DIAMOND	12/27/2024	Value	1,452	0	(1,452)		DUPLICATE ASSESSMENT
Public Notes:						Tax	15.83	0.00	(15.83)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	15.83	0.00	(15.83)	0.00	
2024003113	653718	PP	2023	CLAYTON, JAMES STEVEN	12/23/2024	Value	61,664	15,913	(45,751)		TAXPAYER MOVED
Public Notes:						Tax	385.71	99.54	(286.17)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	385.71	99.54	(286.17)	0.00	
Totals for Type Value Change - Release :						Value	319,106,701	317,932,914	(1,173,787)		
						Tax	2,770,946.39	2,762,277.66	(8,668.73)		
						LL	108,203.30	1,002.55	(107,200.75)		
						INT	0.00	0.00	0.00		
						Tax TTL	2,879,149.69	2,763,280.21	(115,869.48)	398.07	
Grand Totals :						Value	326,265,501	327,365,844	1,100,343		
						Tax	2,829,687.50	2,837,405.57	7,718.07		
						LL	108,203.30	1,002.55	(107,200.75)		
						INT	0.00	2,260.55	2,260.55		
						Tax TTL	2,937,890.80	2,840,668.67	(97,222.13)	398.07	
										398.07	



Union County, NC

Staff Report

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

File #: 25-021

Agenda Date: 1/21/2025

TITLE:

Contract Amendment - Additional Design Services for BARN Project

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

January 16, 2024, Regular Meeting, Agenda Item 24-045 - Approved Design Contract with CPL Architects & Engineers, PC

BACKGROUND:

CPL Architects & Engineers, PC has been delivering design services for the BARN project since March 2024. During the design process, several changes in original scope have occurred that warrant consideration of a design fee adjustment. The additional scope includes a change from a pre-engineered structure to typical steel and masonry structure, additional food service programming and space planning, more extensive food equipment pricing efforts, additional conceptual design options and site development items like loading docks, gray water stations and screen walls. The original design fee was \$600,250.00. The cost of this amendment is \$185,070.00 bringing the revised total fee to \$785,320.00. Staff recommends approval of this contract amendment to provide additional design services as needed for the project.

FINANCIAL IMPACT:

The cost for this amendment is \$185,070.00. There are sufficient funds in the BARN Project capital account, 40080187, to cover this expense.



AIA® Document G802® – 2017

Amendment to the Professional Services Agreement

PROJECT: *(name and address)*
Union County BARN

AGREEMENT INFORMATION:
Date: January 10, 2024

AMENDMENT INFORMATION:
Amendment Number: 001
Date: September 27, 2024

OWNER: *(name and address)*
Union County
500 North Main Street
Monroe, NC 28112

ARCHITECT: *(name and address)*
CPL Architects & Engineers, PC
6302 Fairview Rd, Suite 102
Charlotte, NC 28210

The Owner and Architect amend the Agreement as follows:

See attached revised Proposal dated September 26, 2024

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

Compensation Adjustment:

See revised Proposal dated September 26, 2024

Schedule Adjustment:

See attached proposal dated September 26, 2024

SIGNATURES:

CPL Architects & Engineers, PC
ARCHITECT *(Firm name)*



SIGNATURE

Rachel Nilson, AIA
PRINTED NAME AND TITLE

September 27, 2024
DATE

Union County
OWNER *(Firm name)*

SIGNATURE

PRINTED NAME AND TITLE

DATE

EXHIBIT A

September 26, 2024

Mr. Gordon Vincent AIA, Project Manager
Union County
1407 Airport Road
Monroe, NC 28110



RE: Union County - BARN
Monroe, NC
Contract Amendment 001

Dear Mr. Vincent:

Thank you again for allowing CPL the opportunity to provide professional Architectural and Engineering Services for Union County – BARN project.

The design team respectfully request professional additional service fees as identified as Amendment 001 line items within the Fee Schedule table below. The following summary is intended to describe the scope and effort not anticipated or known prior to executing the design services contract, significant deviations of assumptions, extensions of anticipated durations, etc.

Schedule

Conceptual Design duration was 14 weeks beyond anticipated efforts as identified in the original design and construction schedule. During this extended duration, the design team re-evaluated the program to reduce the construction budget and align more closely with the overall project budget. A revised program was developed which resulted in a complete building and site plan redesign of two different scenarios. This redesign included two different floor plan as well as equipment plan scenarios. In addition, there was significant effort for the design team to develop the kitchen equipment cost estimates of both the original design as well as the redesign, essentially developing four total kitchen equipment estimates. Cost estimating was not included in our original design services, but is certainly a critical budgetary component of this project and assisted Edifice in developing the overall project budget.

Building Structure

The Structural and Architectural design proposal assumed a pre-engineered building. This is significantly less architectural planning, detailing, coordination, and specifications. Similarly, structural engineering included limited effort for a pre-engineered building, essentially limited to building foundations.

Food Service

90% of the building is dedicated to food service programming and subsequent design team efforts. The design contract assumed only 50% of the building would be dedicated to food service programming and design. The additional efforts for the design team include but are not limited to:

- Additional food service programming and planning and architectural space planning.



- A more detailed set of food service drawings and equipment list was developed than would typically be developed during concept design in order to identify a more accurate food service budget / overall project budget.
- As described in the contract under Task I scope of services, the design team anticipated presenting two different floor plan and site plan configurations and that one (1) design solution would be selected after presenting Task 1A deliverables. The design team was asked to continue to develop two different floor plan options including kitchen equipment planning for each option, and to develop two different associated site plans throughout the conceptual design phase. This was partially described under the schedule summary above and resulted in an additional 14 weeks of effort.
- Additional cost estimating from the design team for kitchen equipment. This was described under the schedule summary above.
- Additional Mechanical, Electrical, Plumbing scope as a result of the higher percentage of building area dedicated to food service.

Site Development (the following items were not known at the time of contract execution)

- The site was not identified / known
- Rezoning - While we are not facilitating the entire process nor contracted to document the rezoning of our site, there has been time and effort put towards assisting in the rezoning effort to date. We understand that this will be an ongoing effort.
- In our exclusions we listed no design of any structure outside of the main building footprint such as site walls, decorative site improvements, retaining walls, exterior ramps, gates, etc. Design team efforts are needed from the civil, structural, and architectural team for items mentioned in addition to these:
 - Loading dock
 - Grey water dump station
 - Screen wall / Fencing
 - Food truck structure - The structure and associated planning, details, and utilities.
 - Site wayfinding monument

BDSSMAS

- Scorecard submission at each phase



FEE SCHEDULE	FEE
Task I – Feasibility Study	54,200.00
Task II – Schematic Design	73,140.00
Task III – Design Development	138,840.00
Task IV – Construction Documentation	184,200.00
Task V – Construction Procurement	20,910.00
Task VI – Construction Administration	103,960.00
Original Design Fee Total	575,250.00
Geotechnical Subsurface Investigation & Report	25,000.00
Original Contract Total – January 08, 2024	\$600,250.00
Amendment 001 Task I – Feasibility Study	30,755.00
Amendment 001 Task II – Schematic Design	18,153.00
Amendment 001 Task III – Design Development	25,532.00
Amendment 001 Task IV – Construction Documentation	72,145.00
Amendment 001 Task V – Construction Procurement	2,025.00
Amendment 001 Task VI – Construction Administration	36,460.00
New Contract Total	\$785,320.00

If you have any questions or require further information, please let us know. We look forward to the successful completion of this very important project.

Sincerely,

CPL

Rachel F. Nilson, AIA
 Principal-in-Charge

cc: Mr. Brad Norvell (bnorvell@cplteam.com)



Union County, NC

Staff Report

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

File #: 25-022

Agenda Date: 1/21/2025

TITLE:

Task Order - Architectural Services for Government/Judicial Center Building Envelope Repairs Project

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:

This request is to approve Task Order #2023-070-01 for Gensler Architecture, Design & Planning, P.C. to provide architectural services for the Government/Judicial Center Building Envelope Repairs project. The project is anticipated to include exterior building envelope repairs at the Government Center including caulking, glazing, tuck-pointing, sealing, partial window or glass replacement, flashing and other waterproofing items. The scope of work was determined through a study conducted in 2022 that identified the highest priority items, some of which have been completed previously. This scope will address the next highest priority level items identified for the Government Center in the exterior envelope study. The architect will provide all construction documents, bidding assistance and construction administration. The projected construction budget for the project is \$650,000.00.

Gensler Architecture, Design & Planning, P.C. was selected as one of the County's On-Call Architectural Design teams for various capital projects. Staff has negotiated a scope and fee for the services for this project and recommends approval of task order 2023-070-02 in the amount of \$71,082.00.

FINANCIAL IMPACT:

The cost of the services provided within this task order is \$71,082.00 and there are sufficient funds in the Government/Judicial Center Building Envelope Repairs capital account, 40080123, to cover the expense.

TASK ORDER

This Task Order pertains to an Agreement by and between UNION COUNTY (“OWNER”), and GENSLER ARCHITECTURE, DESIGN & PLANNING, P.C. D/B/A GENSLER (“ARCHITECT”), dated March 19, 2024, (“the Agreement”). ARCHITECT shall perform services on the project described below as provided herein and in the Agreement. This Task Order shall not be binding until it has been properly signed by both parties. Upon execution, this Task Order shall supplement the Agreement as it pertains to the project described below.

TASK ORDER NUMBER: 01

RELATED RFQ NUMBER: 2023-070

PROJECT NAME: Union County Government Center Exterior Improvements

PART 1.0 PROJECT DESCRIPTION:

Exterior improvements at the Union County Government Center at 400 North Main Street, Monroe, North Carolina. Per the SKA Engineering condition assessment and evaluation from April 24, 2020 a list of distressed conditions were identified and scope determined by Union County review as outlined in Part 2.0.

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

Construction Documents (drawings and specifications) to repair the scope of potential water management. Items in scope determined by Union County from SKA Engineering April 24, 2020 report – only items listed below selected to be in the scope. Numbered per SKA report. Others not in current scope.

1. Removal and replacement of existing first floor storefront windows. Removal of existing topping slab and waterproofing membrane located directly above the first-floor slab.
2. Removal of the bottom 4 courses of brick veneer directly above the topping slab.
3. Installation of new 2-inch concrete curb to raise the current height of the existing elevation of the storefront windows
4. Installation of new fluid-applied split slab waterproofing membrane system on the first-floor suspended slab. New fluid-applied waterproofing membrane will extend vertically up the existing concrete curb and extend behind the new floor-line flashing system.
5. Installation of new bi-level floor drains. Installation of a properly-sloped topping slab to promote proper drainage of the terrace slab.
6. Installation of a new self-adhering through-wall flashing system with stainless steel extender flashing and drip edge above a new fully-grouted first course of brick. Flashing system to have welded end dams at all terminations and be

continuous around building corners. Install cell vent weeps within brick head joints at 24-inches on center.

7. Installation of new brick above flashing system.

8. Installation of new sealant joints at all window perimeters, wall penetrations, wall-to-slab transitions, etc.

16. Install a new through-wall flashing system at the base of the second and fourth-floor masonry. Flashing repairs generally consist of the following: removal of lower (3) brick courses, installation of a new self-adhering through-wall flashing system with stainless steel drip edge, and installation of new matching brick.

18. Install new horizontal sealant joint along the top course of brick at the brick-to-concrete perimeter beam transition along the first, second, and ninth-floor levels.

19. Remove and replace existing distressed window, door, and louver perimeter sealants and precast panel joints on the building façade. Seal all through-wall penetrations (conduits, light fixtures, plumbing lines, cameras, etc.)

20. Remove all existing metal-to-metal and metal-to-glazing wet-glazing sealants from the window system. Clean surfaces and replace with new wet-glazing sealants.

23. Open/damaged flashings and impact damage should be repaired with a reinforced coating in accordance with the membrane manufacturer's instructions and as required to maintain the existing warranty.

24. The open through-wall overflow pipes/scuppers should be flashed with a reinforced coating in accordance with the membrane manufacturer's instructions and as required to maintain the existing warranty.

Scope includes 1 in person project kick off meeting, 1 in person page turn at 90% construction documents, 3 in person OAC meeting with site walks, all other meetings to be virtual.

PART 3.0 ADDITIONAL SERVICES, NOT PART OF BASIC SERVICES:

The following can be provided upon request:

Field Testing Air/Water Testing of Fenestrations \$2,500 per day

AAMA 503 Field Testing \$2,500 per day

Sealant Adhesion Testing \$650 per half day

Additional pre-installation meetings, construction mock-ups or Site visits \$3000.00 each.

Construction Administration beyond 8 weeks at \$2,000.00 a week.

PART 4.0 OWNER'S RESPONSIBILITIES:

Provide existing drawings

PART 5.0 PERIODS OF SERVICE:

Upon commencement of basic services:

Design Development:	3 weeks
Construction Documents:	3 weeks
Permit Review period	Per Union County Review
Construction Administration:	Estimated 8 weeks

PART 6.0 PAYMENTS TO ARCHITECT:

1. Payment for Basic Services:

Gensler:	\$54,982.00
SKA Engineers:	\$17,100.00
TOTAL:	\$71,082.00

-

Fee Includes:

- All necessary investigatory site visits
- Attendance at Bid Opening and certification of bids
- 1 Pre-Installation Meeting
- 1 Construction Mockup review on site
- 3 Periodic site visits with onsite OAC meetings.

2. Payment for Additional Services: See Part 3.0

PART 7.0 OTHER:

N/A

This Task Order is executed: _____

UNION COUNTY,
NORTH CAROLINA

Gensler

By: _____

By: Whitley Wood

Name: Brian W. Matthews

Name: Whitley Wood

Title: County Manager

Title: Principal

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

Address: 101 South Tryon Street
Suite 2100
Charlotte, North Carolina 28280



Union County, NC

Staff Report

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

File #: 25-024

Agenda Date: 1/21/2025

TITLE:

Amendment to the Union County Pay and Classification Plan

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve a revision of the Union County Pay Plan to include new job classification titles and pay grades.

- 1) Add the following classifications and associated pay grades:
 - a. Applications Supervisor - pay grade O
 - b. Applications Administrator - pay grade N

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Updates to the Union County Pay Plan are necessary to add, update, and remove job classification titles to align with current and future organizational needs.

FINANCIAL IMPACT:

No additional funds required.



Union County, NC

Staff Report

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

File #: 24-885

Agenda Date: 1/21/2025

TITLE:

Minutes for Approval

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve minutes of regular meeting of January 6, 2025

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Draft minutes have been provided to the Board for review and approval on the January 21, 2025, consent agenda.

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

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

File #: 25-007

Agenda Date: 1/21/2025

TITLE:

FY2024 Popular Annual Financial Report

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Popular Annual Financial Reports provides a condensed version of the County's financial statements and represents the highlights of the financial status of the County.

The FY 2024 Popular Annual Financial Report will be available on the County's website on the Finance Department's webpage at the following link:

<https://www.unioncountync.gov/government/departments-f-p/finance/popular-annual-financial-reports>

FINANCIAL IMPACT:

None.



Popular Annual Financial Report

Union County, NC

Fiscal Year Ended June 30, 2024



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Letter from the County Management Team

On behalf of the Board of Commissioners and the Union County Management Team, we are proud to present the County's Popular Annual Financial Report (PAFR). The following report provides the financial highlights for Union County Government for the fiscal year that ended on June 30, 2024.

For more detailed financial information, our Annual Comprehensive Financial Report (ACFR) is available on our website.

The County is committed to adapting to the changing needs of our residents while upholding sound financial practices and always prioritizing the health and safety of our residents.

This year, we have experienced great success. We facilitated various projects to enhance services for residents and expand resources for our employees. The County celebrated the opening of the Yadkin River Water Treatment Plant last summer. Additionally, renovation of our Patton Avenue facility is complete; Human Services opened a new immunizations clinic space; and the first phase of a major redesign at the landfill on Austin Chaney Road is nearly finished.

This year, our organization had a solid financial performance, and we are confident about the outlook in the year ahead. The County has maintained its bond ratings from all three rating agencies: Standard & Poor's AAA, Moody's Aaa and Fitch AAA.

We will continue to make sound financial decisions that will benefit our residents as we remain dedicated to improving our service to the County.

We appreciate your interest in the County's financial information and welcome your comments and questions.

Best regards,

Brian Matthews, Patrick Niland, Clayton Voignier

Union County is proud to publish the Popular Annual Financial Report (PAFR) as a supplement to the Annual Comprehensive Financial Report (ACFR).

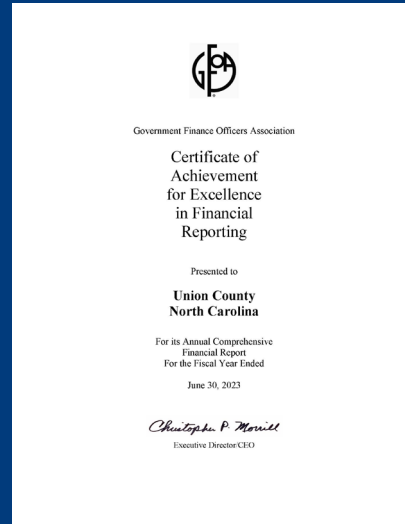
This document provides an overview of Union County's fiscal health over the past fiscal year in an easy-to-read format. The PAFR is derived directly from the financial information presented in our comprehensive report and both reports are in compliance with Generally Accepted Accounting Principles (GAAP).

The PAFR is a recommended practice of the Government Finance Officers Association (GFOA): the authority on best practices in governmental accounting and financial reporting.

The GFOA has given its Award for Outstanding Achievement in Popular Annual Financial Reporting (PAFR) to Union County for the fiscal year that ended June 30, 2023. Union County has received this award for ten consecutive years. In order to receive this top honor, we must publish a Popular Annual Financial Report that has creativity and is easily understood by our readers.

We hope you find the following report to be concise and informative.

To read more details on our finances and to review the Annual Comprehensive Financial Report, please visit our Finance page at ucgov.info/ACFR2023.



J.R. Rowell
Chairman



Brian Helms
Vice Chairman



Clancy Baucom



Melissa Merrell



David Williams

About Union County

Established in 1842, Union County was formed by combining portions of Anson County and Mecklenburg County. Its name is a compromise between Whigs, who wanted to name the new county for Henry Clay, and Democrats, who wanted to name it for Andrew Jackson. Situated in the south-central Piedmont area of North Carolina, Union County is approximately 643 square miles of land southeast of Charlotte.

The County operates under a Commission-Manager form of government. The governing body of the County is the Board of County Commissioners, which formulates policies for the administration of the County. In addition, the Board annually adopts a balanced budget and establishes tax rates for the support of County programs. The Board consists of five commissioners, elected on a staggered basis for terms of four years.

The County provides a wide range of services including public safety, human services, funding for education, cultural and recreational activities, and general administration. Additionally, the County owns and operates water, sewer, and solid waste systems. The annual financial report includes all funds of the County and all activities considered to be a part of (controlled by or dependent on) the County.

Our Mission Statement

One team, working together in a positive environment based on trust, empowerment, creative thought, and professionalism that delivers customer-focused results.

Our Vision Statement

Through continuity of leadership and direction and built upon consensus of the community, we identify and implement strategies, programs, and services necessary to promote and sustain the quality of life and lifestyles unique to Union County. Our number one priority is to serve the residents of Union County.



Union County: A Closer Look

23

Largest County in NC By Area

8th

Largest County in NC By Population

257,682

Population

3.8%

Unemployment Rate

\$98,215

Median Household Income

\$279,500

Median Housing Value

39.9

Median Age

6.6%

Veterans

1,480

Number of County Employees

3

Number of County Parks

12.9%

Foreign Born

5

Number of Schools

4

Number of Libraries

80.7%

Homeownership

83,555

Meals Served by Senior Nutrition

78,105

Number of Trips by Transportation

375

Commercial Construction Permits

772

Miles of Sewer Lines

2,179

Number of Visitors to Veteran Services

6,898

Number of Patients for Public Health

Primary Employers

Union County Public Schools
Union County Government
Tyson Farms Inc.
Harris Teeter
ATI Specialty Materials LLC

Largest Taxpayers

Allegheny Technologies
Union Electric Membership Corp.
Duke Energy
Charlotte Pipe & Foundry Co.
Piedmont Natural Gas

Union County: Award-Winning Departments

Several of our County departments were recognized throughout the year for their innovative programs, service delivery or outstanding staff. A highlight of some of those awards include:

The Center for Digital Government (CDG) and the National Association of Counties (NACO):

- Fifth Nationally with the Center for Digital Government Survey for Technology Excellence Award for 2023

Community Health Assessment (CHA) Recognition Award:

- Excellence in the 2022 Community Health Assessment

Government Finance Officers Association (GFOA):

- Certificate of Achievement for Excellence in Popular Financial Reporting for Fiscal Year Ended 2023
- Certificate of Achievement for Excellence in Financial Reporting for Fiscal Year Ended 2023
- Distinguished Budget Presentation Award for Fiscal Year Beginning 2023

North Carolina Association of Governmental Purchasing (NCAGP):

- Union County Procurement and Contract Management received the 2023 Sustained Professional Purchasing Award (SPPA)

North Carolina City & County Communicators (NC3C):

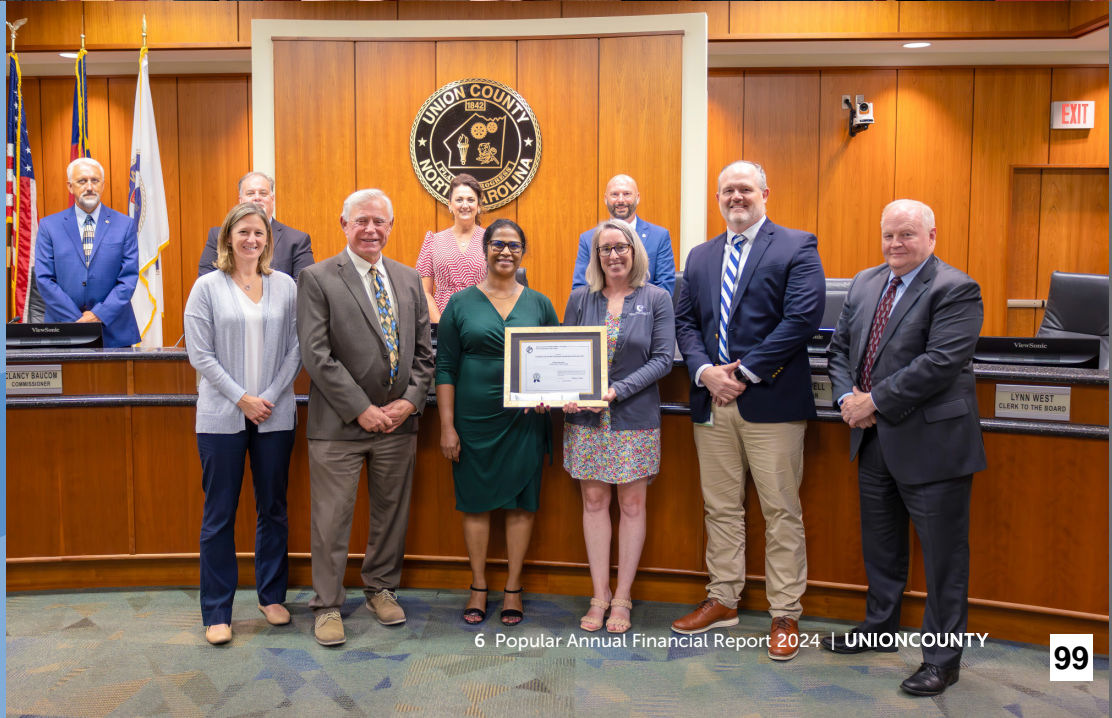
- Excellence in Communications Award for the UC Horizon
- Excellence in Communications Award for the UC Insider

North Carolina Department of Labor – Water & Wastewater Operations:

- Gold Safety Award

National Safety Council – Water & Wastewater Operations:

- 2023 Industry Leader Award
- 2023 Occupational Excellence Achievement Award



Fiscal Control

Unlike a for-profit organization whose primary goal is to generate income, a local government's objective is to provide services and focus on the availability of resources to provide those services. Local governments impose various taxes to be able to provide these services.

Union County Government serves all of the 257,682 residents by providing services to the collective whole. The services provided by the County include, but are not limited to, law enforcement, fire protection, water and sewer, public health, social services, transportation, waste disposal and funding for education.

The following key factors contribute to the fiscal health of the organization.

BOND RATING

Similar to a personal credit score, this is a representation of the creditworthiness of a government's bonds. Bond rating is a key indicator of a bond issuer's financial strength and capacity to repay the principal and interest. This has a direct impact on the County's ability to successfully attract investors, and more importantly, achieve the lowest interest rate possible.

The County is proud of the Aaa/AAA/AAA credit ratings, which signify the highest ratings possible in the municipal rating scale. Union County is one of the few counties in the country that maintains high financial ratings from all major rating agencies.

DEBT

The County continues to look for opportunities to lessen the debt burden on the citizens, by focusing on a proactive debt management strategy, advanced refund opportunities, and early debt redemptions while maintaining a fiscally conservative debt management approach when considering issuing new debt.

The County has \$415.5 million in general fund debt outstanding, or \$1,657 debt per capita. In theory, the debt per capita information demonstrates each person in Union County's fair share of the general government debt. No new debt was issued during fiscal year 2024, only payments were made towards existing debt. As a result, the debt per capita is \$185 less per person compared to fiscal year 2023.

BUDGET

The North Carolina General Statute mandates that the County provides and adopts a balanced budget in accordance with the provision of the Local Government Budget and Fiscal Control Act. The budget is a legally adopted document that incorporates input from the citizens of the county, the management of the county, and the decisions of the board about which services to provide and how to pay for them. It also authorizes the county to obtain funds from identified sources to finance these current period activities.

The budget provides guidance to a county making sure spending is in line with revenues. The budget is considered balanced when estimated net revenue equals appropriations. Historically, Union County has posted above average revenues and trimmed expenditures throughout the budget year. The balanced budget ordinance must be adopted prior to the beginning of the fiscal year. The Union County Budget Ordinance is located at ucgov.info/FY24AdoptedBudget.

FINANCIAL PLANNING

Union County utilizes historical budget analysis, revenue projections, long range growth models and the Capital Improvement Program to determine future needs, timing, and acquisition of assets. The County also uses outside actuarial sources for calculations of other postemployment benefits, healthcare and pension obligations in order to proactively fund for future costs on a pro-rata basis.

ANNUAL INDEPENDENT FINANCIAL AUDIT

North Carolina General Statutes require an annual audit be performed by an independent certified public accountant. This annual audit relates to the Annual Comprehensive Finance Report (ACFR), and the purpose of the audit is to ensure Union County is complying with general accepted accounting principles (GAAP). This year's Independent Auditor's Report confirms that the County's financial statements are "present fairly, in all material respects, the respective financial position: All financial information stated in this Popular Annual Financial Report is presented in accordance with GAAP, more detail can be found on the Finance Department's website.



Net Position

Net position may be found on the government-wide balance sheet, and it represents what the County owns (assets plus deferred outflows) and owes (liabilities and deferred inflows). It is reported for governmental activities and business-type activities. This amount is broken down into three categories including net investment in capital assets, restricted net position and unrestricted net position. Net position may serve over time as a useful indicator of government’s financial condition.

Net investment in capital assets category reflects the County’s net investment in capital assets (e.g., land, buildings, machinery, equipment, vehicles, and infrastructure) less any related outstanding debt that was issued to acquire those assets. Union County uses these capital assets to provide services to citizens; consequently, these assets are not available for future spending. Restricted net position represents resources that are subject to external restrictions on how they may be used.

Unrestricted net position represents resources available to the County to provide services to the residents if there were no additional revenues available.

As with many counties in the State of North Carolina, the County’s Governmental Activities deficit in unrestricted net position in the amount of \$333,433,854 is due primarily to the portion of the County’s outstanding debt incurred for the Union County Board of Education (the “school”) and the South Piedmont Community College (the “community college”).

Under North Carolina General Statute, the County is responsible for providing capital funding for the school and community college systems. The County has chosen to meet its legal obligation to provide the systems’ capital funding by using a mixture of County funds, general obligation debt and installment financings. The assets funded by the County, unless otherwise obligated, are titled to, and utilized by the school and community college systems. Since the County, as the issuing government, acquires no capital assets, the County has incurred a liability without a corresponding increase in assets.

	Governmental	Business-type	Total
Net Investment in Capital Assets	73,828,805	264,481,592	338,310,397
Restricted	232,409,686	377,778	232,787,464
Unrestricted	(333,433,854)	183,809,581	(149,624,273)
Total Net Position	(27,195,363)	448,668,951	421,473,588

Fund Balance

Fund Balance is the amount of reserve funds that the County has on hand that can be used in the event of unforeseen circumstances, state of emergencies and for future needs. Fund balance is an indicator of fiscal stability that is measured at year-end. Available fund balance is the total amount that is not restricted or committed to a specific use or purpose.

The Board of County Commissioners has passed robust policies outlining the appropriate reserve levels the County is expected to maintain. The Board has determined the County should maintain an available reserved (committed) fund balance of 20 percent of total expenditures for unforeseen needs or opportunities.

Union County reported \$151,997,734 total fund balance for general fund. This is \$15,682,829 less than the fiscal year 2023 fund balance. This is primarily due to the less than expected Local Option Sales Tax collections and one-time expenditures funded by unassigned fund balance throughout the year.

As a measure of the general fund's liquidity, it may be useful to compare both unassigned fund balance and total fund balance to total general fund expenditures.

As of June 30, 2024, the County has a fund balance (based on committed, assigned, and unassigned) of 32.3 percent of general fund expenditures, while the total fund balance represents 42.8 percent of that same amount.

Revenues

GENERAL FUND

Like the majority of North Carolina counties, Union County relies heavily on ad valorem taxes, which are the taxes collected by the county on physical and personal property, based on its estimated value. In fiscal year 2024, ad valorem tax revenue accounted for 61 percent of all revenues collected by the general fund, largely due to organic growth of the County property tax base while maintaining the 58.80 cents tax rate. \$237 million in property tax revenue reflects an increase of 4 percent. Union County expects the growth throughout the area to continue.

The next largest single revenue source was local option sales tax, which brought in just over 18 percent of all revenues last year.

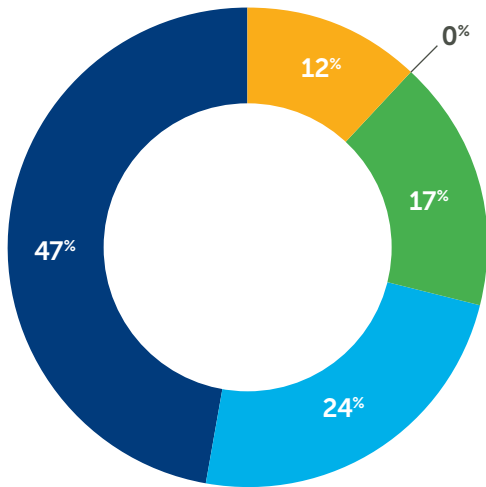
The County has the ability to increase or decrease revenues only through the setting of the tax rate. Local option sales tax and the rest of the revenues are essentially based on the market, residential growth, and usage. As a result, the County has very little flexibility to increase revenues throughout the year.

General Fund Activities	2024	2023	2022	2021	2020
Operating Revenues	391,816,122	371,195,204	354,778,911	326,128,886	309,293,344

PROPRIETARY FUNDS

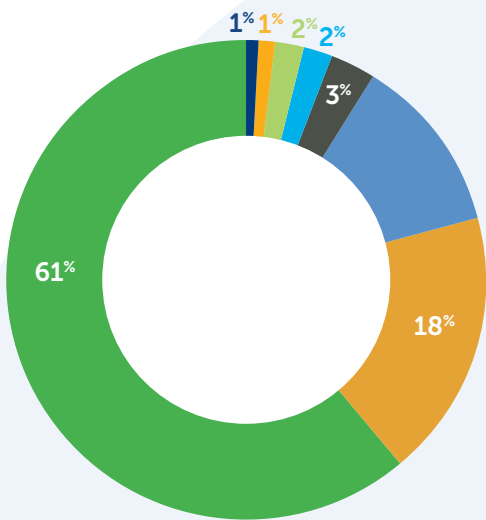
The proprietary funds (business-type activities) operating revenues include charges for services for water and sewer as well as solid waste disposal fees. Union County Government's operating budget is for tax-funded services, such as education, County department programs and services, the Union County Sheriff's Office, supporting community partners, and other crucial services residents rely on. The operating budget for Union County Water is funded solely by rates and fees collected from ratepayers of the utility and is not funded by taxpayer dollars. It is important to note, as in previous years, these revenues are used only in the operations of proprietary funds, and not in general County operations.

Business-Type Activities	2024	2023	2022	2021	2020
Operating Revenues	88,302,146	91,057,943	84,503,623	74,536,352	63,044,897



Fund Balance Categories:

Nonspendable:	Amounts that cannot be spent because they are either not in spendable form such as inventory, prepaid expenses, buildings; or the government is contractually bound to maintain the amount
Restricted:	Amounts that are restricted to a specific purpose by external parties, or laws or regulations, constitutional provisions or legislation
Committed:	Amounts that are committed for a specific purpose by formal action of the government's highest level of decision-making. (the Board)
Assigned:	Amounts that are intended by the government to be used for specific purposes
Unassigned:	Amounts available for any purpose



- Property Taxes
- Sales Tax
- Other Taxes and Licenses
- Intergovernmental
- Permits and Fees
- Sales and Services
- Investment Earnings
- Miscellaneous

Expenses

GENERAL FUND

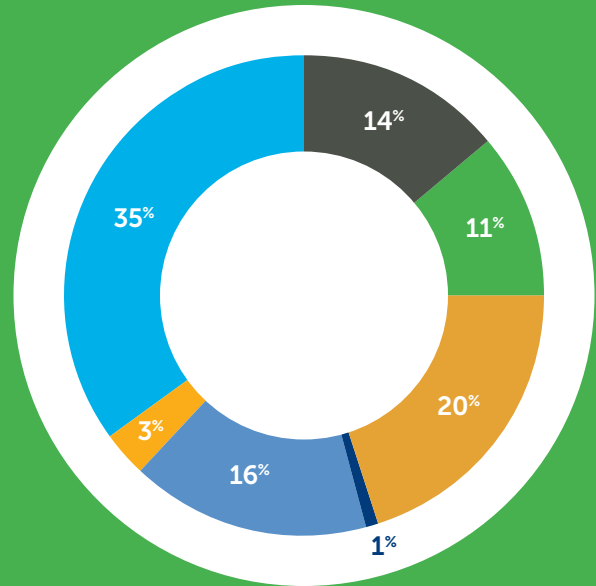
The County has successfully managed expenditures and conservatively budgeted revenues to maintain adequate reserves in the recent past. As a result of these efforts, the County's stability continues to improve.

On the expenditure side, we have broken out the uses in a broad spectrum. Educational funding continues to be the largest cost within the County. With roughly 41,497 students, or nearly one in every six residents of the County attending primary school or South Piedmont Community College, education continues to drive expenditures.

The dramatic population growth, combined with the number of students mentioned above, required a level of capital funding that could only be accomplished through debt funding. While the County is fiscally sound and has enough resources to withstand economic downturn, it continues to have a relatively high debt burden. Today, (combined) debt service and human services areas are 16 percent of the County's expenditures. This is the third largest expenditure of the County. Public Safety at 20 percent, is the second largest expenditure of the County.

Public Safety and Human Services both require significant funding due to the services they provide. Law enforcement, fire and EMS remain diligent and prepared to protect and serve our residents in need. Funding is established for new equipment, training and better apparatus.

Aside from debt service, major expenditure categories that are funded by tax dollars include: General Government, Public Safety (Sheriff's Office, Emergency Management, Emergency Communications, Fire Marshal's Office, Building Code Enforcement, Outside Agencies); Economic and Physical Development (Planning, Cooperative Extension Service, Soil and Water Conservation, Outside Agencies); Cultural and Recreational (Libraries, Parks & Recreation, Outside Agencies); Education (Union County Public Schools, South Piedmont Community College, Literacy Council); and Human Services (Public Health, Social Services, Transportation, Community Outreach, Veterans Services, Outside Agencies).



PROPRIETARY FUNDS

Operating expenses for proprietary funds include the cost of sales and services, administrative expenses, and depreciation on capital assets. All revenues and expenses not meeting this definition are reported as non-operating revenues and expenses.

Business-Type Activities	2024	2023	2022	2021	2020
Operating Expenses	82,294,603	65,376,659	62,681,384	58,836,147	54,157,849

General Fund Activities	2024	2023	2022	2021	2020
Operating Expenditures	355,588,698	333,335,013	310,837,676	299,423,218	281,535,688

A Review of the County's Debt

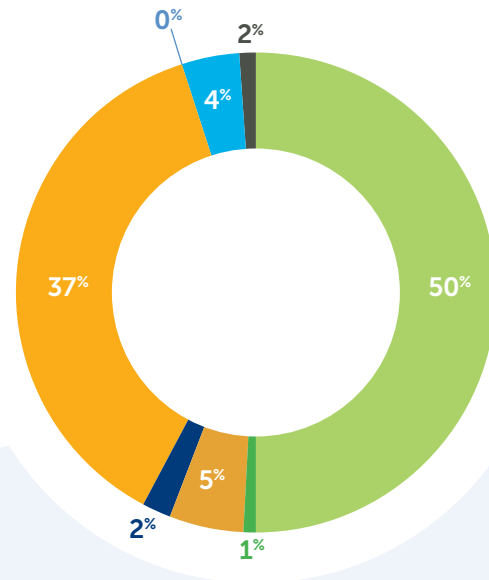
The County has a total of \$827,565,000 debt outstanding. \$338.7 million is for Education including the public school system and the community college, \$38.3 million is for Public Safety, \$15.9 million is for Economic and Physical Development, \$10.6 million is for Cultural & Recreational, \$11.9 million is for General Government, and lastly \$412 million is for Water and Sewer functions of the County.

Debt service is viewed as a necessary tool among municipal governments because few municipalities have the ability to cash fund large projects.

The County has issued debt for a variety of capital projects to fulfill capital needs during prior years. Capital projects that were completed with debt proceeds include schools, libraries, parks, agriculture and conference center, water and sewer infrastructure, jail, public safety, emergency communications equipment, and court facilities. Union County uses financing options such as General Obligation Bonds, Revenue Bonds and Certificates of Participation to finance these projects.

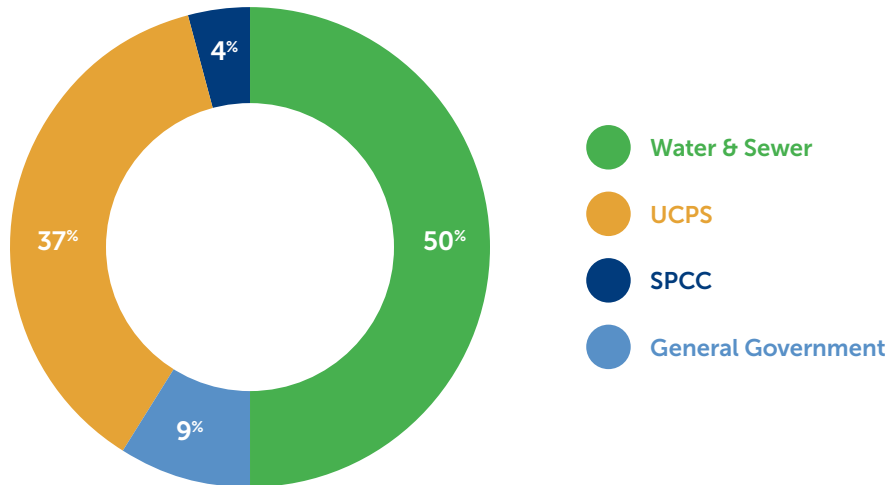
General Obligation bonds serve as a way for a local government to raise funds for projects that create streams of income for resources such as education facilities and county infrastructure. These bonds are usually used to fund government projects that will serve the public community, and they are backed by general revenue of the issuing government entity which is the power of the local government to tax its citizens. It is commonly subject to voter approval and other requirements.

Revenue Bonds issued by a local government unit is backed by a specific stream of revenue. In Union County's case, these are used to finance the construction of water and sewer infrastructure and are paid by water and sewer fees paid by their customers.



- General Government
- Public Safety
- Economic/Physical Development
- Human Services
- Education - UCPS
- Education - SPCC
- Cultural and Recreational
- Water and Sewer

Outstanding Debt by Use



Function:	GO Bonds	Installment Financing	Revenue Bonds	Total Outstanding Principal
General Government	6,774,000	5,192,444	-	11,966,444
Public Safety	38,341,613	-	-	38,341,613
Economic/Physical Development	15,682,000	223,859	-	15,905,859
Education - UCPS	281,477,387	23,864,699	-	305,342,086
Education - SPCC	33,162,000	205,533	-	33,367,533
Cultural and Recreational	10,490,000	126,465	-	10,616,465
Water and Sewer	-	-	412,025,000	412,025,000
Total	\$385,927,000	\$29,613,000	\$412,025,000	\$827,565,000

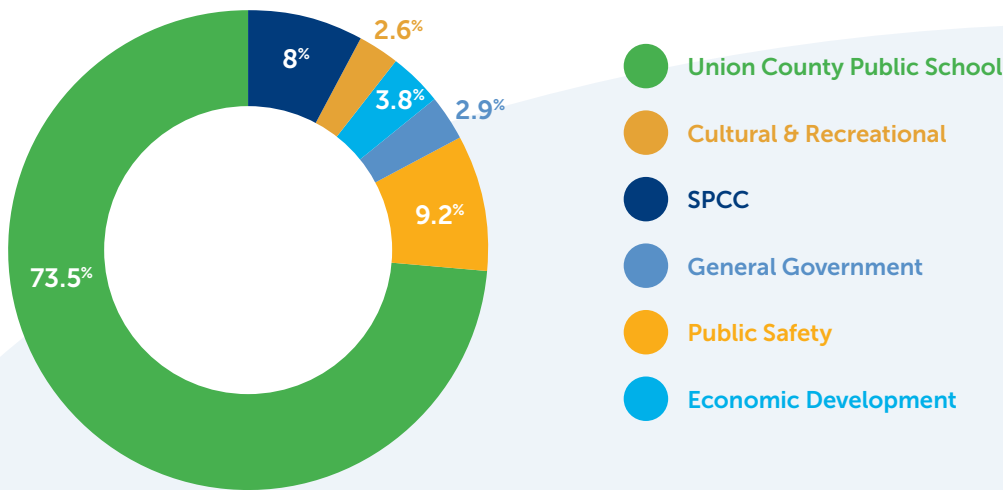
GENERAL FUND DEBT

Total outstanding debt for General Fund is \$415.5 million. Of this amount, \$385.9 million is General Obligation Bonds and \$29.6 million is for Limited Obligation Bond and Installment Financing. Approximately 73.5% percent of the County’s outstanding tax backed debt is for Union County Public Schools.

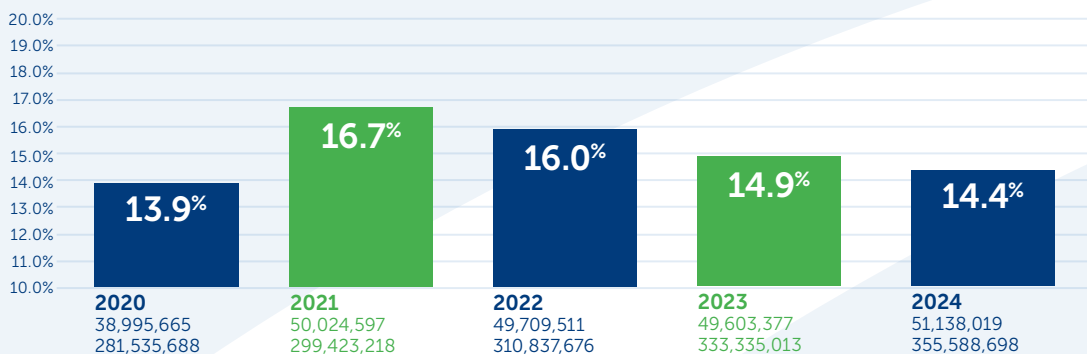
It is important to keep in mind that a government unit may affect its bond ratings negatively if the debt service as a percentage of expenditures becomes too high. Union County has been actively working to mitigate debt service while saving residents funds and working towards reducing the debt. Debt service as a percentage of expenditures is 14.4 percent for fiscal year 2024.



Debt by Category - Governmental Funds



Debt Service as Percentage of Expenditures



*Bond ratings indicate credit quality and financial strength of the issuer. Typically, bonds with higher ratings reflect a strong likelihood the issuer can.

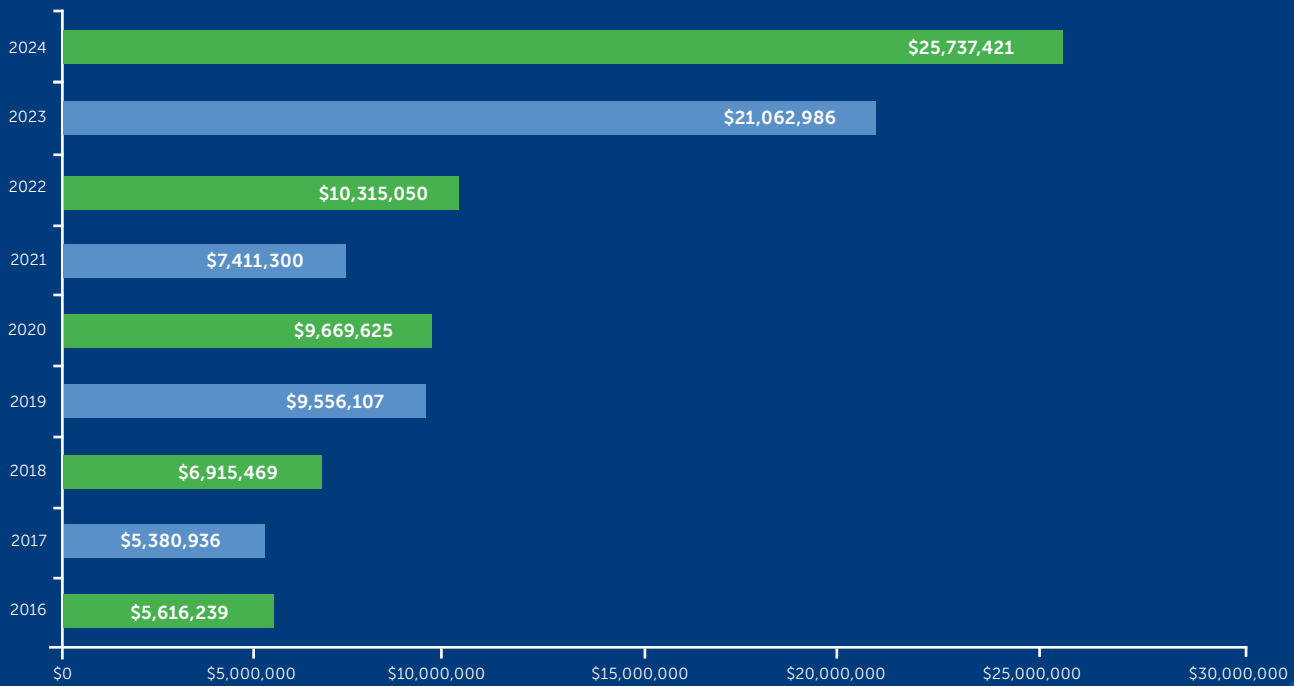
Enterprise Debt

The County has issued enterprise system debt for water and sewer capital improvements throughout the prior fiscal years.

The utility system has four revenue bond issues outstanding. The debt issued benefitted the system and rate payers by providing capital funding for projects such as:

- Catawba River Water Treatment Plant
- 12 Mile Wastewater Treatment Plant
- 853 West Transmission Main
- Water pressure, distribution and collection systems
- Crooked Creek Headworks Improvements
- Yadkin Regional Water Supply Project

Enterprise Fund Debt Service



Capital Improvement Program (CIP)

The adopted FY 2024-2029 Union County Capital Improvement Program (CIP) is made up of three components. Major programs projected for future years in the CIP:



SOLID WASTE CAPITAL PROGRAM

Union County Solid Waste Capital Program consists of a six-year capital plan for the program to provide for equipment purchases; expansion and renovations of current facilities, and new facilities requested at the Union County landfill and various solid waste convenience sites.

- Austin Chaney Site Redesign
- Construction and Demolition Cell Expansion



GENERAL CAPITAL PROGRAM

General Capital Program provides the six-year capital plan for non-utility activity County projects, including South Piedmont Community College. The goal of these projects is to provide for critical repairs and facility needs to maintain or improve general services of government.

- Historic Courthouse Phase 2
- Facilities Maintenance & Renewal
- Parks and Recreation Renewal and Expansion
- Jail Replacement & Expansion
- South Piedmont Community College Expansion
- Firearms Training Range



UNION COUNTY WATER CAPITAL PROGRAM

The Union County Water Capital Program provides the six-year capital plan for the water and wastewater utility program.

This program is largely based on the Comprehensive Water and Wastewater Master Plan that provides a 20-year projection of system needs based on current population growth, population distribution trends, and historical demand data, among several other factors.

- Catawba River Water Treatment Plant Expansion
- Crooked Creek Basin Improvements
- Lower Crooked Creek Water Reclamation Facility
- Twelve Mile Creek Sewer System Expansion
- Various Rehabilitation and Replacements
- West Zone Improvements
- Yadkin Regional Water Supply Project
- 853 West Pressure Zone Improvements

Our Year in Review

The County continued to experience growth in population, which resulted in increased demand for essential public services.

Here are the major projects that Union County accomplished in the past fiscal year:



After nearly two decades, the **Yadkin Regional Water Supply Project** was completed in late summer 2023. Union County now has a second long-term, reliable source of water to meet current and future water supply needs. Construction for the \$300 million infrastructure project began in the fall of 2020. The County issued revenue bonds in the spring of 2021 for this project and various other water and sewer capital projects.



The new **Southwest Regional Library** is opened in the Spring 2024 with expanded collections, programs and meeting area to serve about 70,000 residents within 15 minutes of the library. The 19,000-square-foot library includes a children's storytime area, reading nooks, a science, technology, engineering, arts, and mathematics (STEAM) lab, study rooms, an outdoor patio, technology spaces and more.

What's to Come

Union County continues to invest in initiatives to support our growing community. Here are the major projects that are in progress:

Union County Landfill

The Union County Solid Waste department offers responsible and practical waste management solutions through our network of six residential waste and recycling centers, solid waste transfer station and construction materials solid waste disposal facility. Our final Solid Waste Facility expansion project is nearly complete at our primary facility on Austin Chaney Road. It will include upgrades to our public materials collection area, which will significantly enhance the customer experience, operational safety and efficiency.



South Piedmont Regional Autopsy Center

The South Piedmont Regional Autopsy Center will be located in Wingate, North Carolina, and will provide morgue and forensic pathology services to the residents of Union County and nine surrounding counties. The County will run the center, which will provide vital assistance for cases for local law enforcement.







Union County, NC

Staff Report

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

File #: 25-010

Agenda Date: 1/21/2025

TITLE:

Tax Refunds, Releases and Prorations Approved by Finance Officer

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

On September 8, 2020, the Board of Commissioners adopted a Resolution Delegating Authority for Tax Releases and Refunds of less than \$100 to Union County's Finance Officer. The resolution and NC GS 105-381(b) require such refunds to be reported to the Board regarding actions taken on requests for releases or refunds. All such actions shall be recorded in the Board's minutes. NC GS 105-330.6 authorizes the tax collector to direct an order for a tax refund of prorated taxes to the county finance officer related to surrendering of registered motor vehicle plates. The finance officer shall issue a refund to the vehicle owner. The attached report is for November 2024 NCVTS releases and refunds less than \$100 and prorations approved by the finance officer.

FINANCIAL IMPACT:

None.



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
ABRAMS, KATHLEEN MARY	ABRAMS, KATHLEEN MARY		722 S HIGH POINT RD		MADISON, WI 53719	Proration	0080031953	R3F6575	AUTHORIZED	759339616	Refund Generated due to proration on Bill #0080031953-2024-2024-0000-00	Reg . Out of state	#####	11/21/2024	001	TAX	(\$30.31)	\$0.00	(\$30.31)
															600	TAX	(\$34.36)	\$0.00	(\$34.36)
															020	TAX	(\$9.93)	\$0.00	(\$9.93)
															003	TAX	(\$3.25)	\$0.00	(\$3.25)
															005	TAX	(\$0.72)	\$0.00	(\$0.72)
															004	TAX	(\$5.42)	\$0.00	(\$5.42)
															002	TAX	(\$69.50)	\$0.00	(\$69.50)
Refund																	\$153.49		
ADAMS, JOSHUA ONEAL	ADAMS, JOSHUA ONEAL		2521 OLD CAMDEN RD		MONROE, NC 28110	Proration	0055018670	CMES406	AUTHORIZED	758068052	Refund Generated due to proration on Bill #0055018670-2024-2024-0000-00	Vehicle Sold	#####	11/13/2024	001	TAX	(\$37.62)	\$0.00	(\$37.62)
															980	TAX	(\$4.61)	\$0.00	(\$4.61)
															021	TAX	(\$15.61)	\$0.00	(\$15.61)
															003	TAX	(\$4.03)	\$0.00	(\$4.03)
															005	TAX	(\$0.90)	\$0.00	(\$0.90)
															004	TAX	(\$6.73)	\$0.00	(\$6.73)
															002	TAX	(\$86.27)	\$0.00	(\$86.27)
Refund																	\$155.77		
AHMAD, FUAD RAFIQUE	AHMAD, FUAD RAFIQUE		9110 KINGSHEAD LN		WAXHAW, NC 28173	Proration	0058330873	JAB2193	AUTHORIZED	650861664	Refund Generated due to proration on Bill #0058330873-2023-2023-0000-00	Vehicle Sold	#####	11/21/2024	001	TAX	(\$43.00)	\$0.00	(\$43.00)
															026	TAX	(\$9.88)	\$0.00	(\$9.88)
															003	TAX	(\$4.61)	\$0.00	(\$4.61)
															005	TAX	(\$1.02)	\$0.00	(\$1.02)
															004	TAX	(\$7.69)	\$0.00	(\$7.69)
															002	TAX	(\$98.60)	\$0.00	(\$98.60)
															Refund				
ANDREWS, DAVID BRENDAN	ANDREWS, DAVID BRENDAN		5416 MACROOM CT		MATTHEWS, NC 28104	Adjustment < \$100	0080637909	F3X2539	PENDING	973226673	Refund Generated due to adjustment on Bill #0080637909-2024-2024-0000	Situs error	11/5/2024	001	TAX	\$0.00	\$0.00	\$0.00	
														200	TAX	(\$34.27)	\$0.00	(\$34.27)	
														200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
														700	TAX	\$14.73	\$0.00	\$14.73	
														023	TAX	\$3.49	\$0.00	\$3.49	
														003	TAX	\$0.00	\$0.00	\$0.00	
														005	TAX	\$0.00	\$0.00	\$0.00	
														004	TAX	\$0.00	\$0.00	\$0.00	
														002	TAX	\$0.00	\$0.00	\$0.00	
														Refund					
ATTIANESE, KENNETH ARTHUR	ATTIANESE, KENNETH ARTHUR		1209 FLAT HEADS LN		WAXHAW, NC 28173	Proration	0071337143	HCS4965	AUTHORIZED	869269536	Refund Generated due to proration on Bill #0071337143-2023-2023-0000-00	Vehicle Sold	#####	12/2/2024	001	TAX	(\$16.70)	\$0.00	(\$16.70)
															500	TAX	(\$39.40)	\$0.00	(\$39.40)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$4.29)	\$0.00	(\$4.29)
															003	TAX	(\$1.79)	\$0.00	(\$1.79)
															005	TAX	(\$0.40)	\$0.00	(\$0.40)
															004	TAX	(\$2.99)	\$0.00	(\$2.99)
002	TAX	(\$38.29)	\$0.00	(\$38.29)															
Refund																	\$103.86		
BAIM, WILLIAM CALVIN III	BAIM, WILLIAM CALVIN III		7912 MONTANE RUN CT		WAXHAW, NC 28173	Proration	0066235955	JHN1475	AUTHORIZED	865378080	Refund Generated due to proration on Bill #0066235955-2023-2023-0000-00	Vehicle Sold	11/6/2024	11/7/2024	001	TAX	(\$12.55)	\$0.00	(\$12.55)
															101	TAX	(\$4.61)	\$0.00	(\$4.61)
															101	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															026	TAX	(\$2.88)	\$0.00	(\$2.88)
															003	TAX	(\$1.34)	\$0.00	(\$1.34)
															005	TAX	(\$0.30)	\$0.00	(\$0.30)
															004	TAX	(\$2.24)	\$0.00	(\$2.24)
002	TAX	(\$28.77)	\$0.00	(\$28.77)															
Refund																	\$52.69		
BALASANYAN, ANAIT	BALASANYAN, ANAIT		1054 EASLEY ST		WAXHAW, NC 28173	Proration	0072452526	DRANAIT	AUTHORIZED	866363456	Refund Generated due to proration on Bill #0072452526-2023-2023-0000-00	Vehicle Sold	#####	11/13/2024	001	TAX	(\$16.24)	\$0.00	(\$16.24)
															500	TAX	(\$38.31)	\$0.00	(\$38.31)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$4.17)	\$0.00	(\$4.17)
															003	TAX	(\$1.74)	\$0.00	(\$1.74)
															005	TAX	(\$0.39)	\$0.00	(\$0.39)
															004	TAX	(\$2.91)	\$0.00	(\$2.91)
002	TAX	(\$37.23)	\$0.00	(\$37.23)															
Refund																	\$100.99		
BATSON, BRAYLEN JACK	BATSON, BRAYLEN JACK	BATSON, RICHARD MARK	5322 HARKEY RD		WAXHAW, NC 28173	Proration	0079309624	KAN2513	AUTHORIZED	650863020	Refund Generated due to proration on Bill #0079309624-2024-2024-0000-00	Vehicle Sold	#####	11/21/2024	001	TAX	(\$8.13)	\$0.00	(\$8.13)
															025	TAX	(\$2.50)	\$0.00	(\$2.50)
															003	TAX	(\$0.87)	\$0.00	(\$0.87)
															005	TAX	(\$0.19)	\$0.00	(\$0.19)
															004	TAX	(\$1.45)	\$0.00	(\$1.45)
															002	TAX	(\$18.63)	\$0.00	(\$18.63)
															Refund				
BAUCOM, JOEL DAVID	BAUCOM, JOEL DAVID	BAUCOM, PAULA BRASWELL	8515 MORGAN MILL RD		MONROE, NC 28110	Proration	0043519764	VPM0170	AUTHORIZED	649831992	Refund Generated due to proration on Bill #0043519764-2024-2024-0000-00	Vehicle Totalled	#####	11/14/2024	001	TAX	(\$17.33)	\$0.00	(\$17.33)
															017	TAX	(\$6.24)	\$0.00	(\$6.24)
															003	TAX	(\$1.86)	\$0.00	(\$1.86)
															005	TAX	(\$0.41)	\$0.00	(\$0.41)
															004	TAX	(\$3.10)	\$0.00	(\$3.10)
															002	TAX	(\$39.76)	\$0.00	(\$39.76)
															Refund				



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
BENDER, REBECCA LYNN	BENDER, REBECCA LYNN		2115 LAVENDER MEADOWS CT		MONROE, NC 28110	Proration	0080210770	THA5107	AUTHORIZED	760307632	Refund Generated due to proration on Bill #0080210770-2023-2023-0000-00	Vehicle Sold	#####	11/27/2024	001	TAX	(\$3.80)	\$0.00	(\$3.80)
															200	TAX	(\$11.70)	\$0.00	(\$11.70)
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															003	TAX	(\$0.40)	\$0.00	(\$0.40)
															005	TAX	(\$0.09)	\$0.00	(\$0.09)
															004	TAX	(\$0.68)	\$0.00	(\$0.68)
															002	TAX	(\$8.71)	\$0.00	(\$8.71)
Refund																		\$25.38	
BETHUNE, SEON SHERWYN	BETHUNE, SEON SHERWYN		8000 FOUNTAINBROOK DR		INDIAN TRAIL, NC 28079	Adjustment < \$100	0081030230	RJV3569	PENDING	759107811	Refund Generated due to adjustment on Bill #0081030230-2024-2024-0000-00	SLVG or RBLT TTL	#####		001	TAX	(\$12.99)	\$0.00	(\$12.99)
															600	TAX	(\$14.73)	\$0.00	(\$14.73)
															019	TAX	(\$5.08)	\$0.00	(\$5.08)
															003	TAX	(\$1.39)	\$0.00	(\$1.39)
															005	TAX	(\$0.31)	\$0.00	(\$0.31)
															004	TAX	(\$2.32)	\$0.00	(\$2.32)
															002	TAX	(\$29.80)	\$0.00	(\$29.80)
Refund																		\$66.62	
BETHUNE, SEON SHERWYN	BETHUNE, SEON SHERWYN		8000 FOUNTAINBROOK DR		INDIAN TRAIL, NC 28079	Adjustment < \$100	0081030455	LDP4487	PENDING	759107839	Refund Generated due to adjustment on Bill #0081030455-2024-2024-0000-00	SLVG or RBLT TTL	#####		001	TAX	(\$16.14)	\$0.00	(\$16.14)
															600	TAX	(\$18.30)	\$0.00	(\$18.30)
															019	TAX	(\$6.31)	\$0.00	(\$6.31)
															003	TAX	(\$1.74)	\$0.00	(\$1.74)
															005	TAX	(\$0.38)	\$0.00	(\$0.38)
															004	TAX	(\$2.89)	\$0.00	(\$2.89)
															002	TAX	(\$37.01)	\$0.00	(\$37.01)
Refund																		\$82.77	
BIANCHI, ANTHONY LEE	BIANCHI, ANTHONY LEE		2325 BOWBROOK TRL		MATTHEWS, NC 28104	Proration	0077743257	PKV1713	AUTHORIZED	758068080	Refund Generated due to proration on Bill #0077743257-2023-2023-0000-00	Vehicle Sold	#####	11/13/2024	001	TAX	(\$22.21)	\$0.00	(\$22.21)
															600	TAX	(\$25.17)	\$0.00	(\$25.17)
															020	TAX	(\$6.51)	\$0.00	(\$6.51)
															003	TAX	(\$2.38)	\$0.00	(\$2.38)
															005	TAX	(\$0.53)	\$0.00	(\$0.53)
															004	TAX	(\$3.97)	\$0.00	(\$3.97)
															002	TAX	(\$50.92)	\$0.00	(\$50.92)
Refund																		\$111.69	
BOGARAD, MORGAN GRUBB	BOGARAD, MORGAN GRUBB		8007 STEVENS MILL RD		MATTHEWS, NC 28104	Proration	0079746800	RJL6437	AUTHORIZED	758137723	Refund Generated due to proration on Bill #0079746800-2024-2024-0000-00	Vehicle Sold	#####	11/14/2024	001	TAX	(\$16.42)	\$0.00	(\$16.42)
															700	TAX	(\$21.73)	\$0.00	(\$21.73)
															023	TAX	(\$5.15)	\$0.00	(\$5.15)
															003	TAX	(\$1.76)	\$0.00	(\$1.76)
															005	TAX	(\$0.39)	\$0.00	(\$0.39)
															004	TAX	(\$2.94)	\$0.00	(\$2.94)
															002	TAX	(\$37.63)	\$0.00	(\$37.63)
Refund																		\$86.02	
BOSOVETS, EDUARD	BOSOVETS, EDUARD		601 PICKETTS CIR		INDIAN TRAIL, NC 28079	Proration	0078913554	VDX2309	AUTHORIZED	759554656	Refund Generated due to proration on Bill #0078913554-2023-2023-0000-00	Vehicle Sold	#####	11/25/2024	001	TAX	(\$3.21)	\$0.00	(\$3.21)
															600	TAX	(\$3.64)	\$0.00	(\$3.64)
															019	TAX	(\$1.03)	\$0.00	(\$1.03)
															003	TAX	(\$0.34)	\$0.00	(\$0.34)
															005	TAX	(\$0.07)	\$0.00	(\$0.07)
															004	TAX	(\$0.58)	\$0.00	(\$0.58)
															002	TAX	(\$7.36)	\$0.00	(\$7.36)
Refund																		\$16.23	
BOULWARE, MARIAH JORDAN	BOULWARE, MARIAH JORDAN	BOULWARE, MELISSA BRAZZELL	3704 CHESAPEAKE PL		WAXHAW, NC 28173	Proration	0053372839	DFA0930	AUTHORIZED	864171816	Refund Generated due to proration on Bill #0053372839-2023-2023-0000-00	Vehicle Sold	11/1/2024	11/4/2024	001	TAX	(\$10.28)	\$0.00	(\$10.28)
															500	TAX	(\$24.25)	\$0.00	(\$24.25)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$2.64)	\$0.00	(\$2.64)
															003	TAX	(\$1.10)	\$0.00	(\$1.10)
															005	TAX	(\$0.25)	\$0.00	(\$0.25)
															004	TAX	(\$1.84)	\$0.00	(\$1.84)
002	TAX	(\$23.57)	\$0.00	(\$23.57)															
Refund																		\$63.93	
BRADY, CHRISTOPHER FRANCIS III	BRADY, CHRISTOPHER FRANCIS III	BRADY, FRANCINE CAROL	7011 BRUSH CRK		MONROE, NC 28110	Adjustment < \$100	0080665464	LEF1748	PENDING	865052152	Refund Generated due to adjustment on Bill #0080665464-2024-2024-0000-00	Situs error	11/4/2024		001	TAX	\$0.00	\$0.00	\$0.00
															200	TAX	(\$58.89)	\$0.00	(\$58.89)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															015	TAX	\$6.47	\$0.00	\$6.47
															003	TAX	\$0.00	\$0.00	\$0.00
															005	TAX	\$0.00	\$0.00	\$0.00
															004	TAX	\$0.00	\$0.00	\$0.00
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																		\$82.42	
BRENIIZE, MATTHEW SCOTT	BRENIIZE, MATTHEW SCOTT	BRENIIZE, TINA CANADAY	2209 POPLAR RIDGE DR		MONROE, NC 28110	Proration	0048628539	HBS1981	AUTHORIZED	650861682	Refund Generated due to proration on Bill #0048628539-2023-2023-0000-00	Vehicle Totalled	#####	11/21/2024	001	TAX	(\$12.61)	\$0.00	(\$12.61)
															026	TAX	(\$2.90)	\$0.00	(\$2.90)
															003	TAX	(\$1.35)	\$0.00	(\$1.35)
															005	TAX	(\$0.30)	\$0.00	(\$0.30)
															004	TAX	(\$2.25)	\$0.00	(\$2.25)
															002	TAX	(\$28.91)	\$0.00	(\$28.91)
															Refund				



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
BRIGGS, MICHAEL EDWARD	BRIGGS, MICHAEL EDWARD		8005 GLAMORGAN LN		MATTHEWS, NC 28184	Proration	0016570445	JEL4723	AUTHORIZED	756918855	Refund Generated due to proration on Bill #0016570445-2023-2023-0000-00	Vehicle Sold	11/4/2024	11/5/2024	001	TAX	(\$4.41)	\$0.00	(\$4.41)
															700	TAX	(\$5.03)	\$0.00	(\$5.03)
															023	TAX	(\$1.19)	\$0.00	(\$1.19)
															003	TAX	(\$0.47)	\$0.00	(\$0.47)
															005	TAX	(\$0.10)	\$0.00	(\$0.10)
															004	TAX	(\$0.79)	\$0.00	(\$0.79)
															002	TAX	(\$10.12)	\$0.00	(\$10.12)
Refund																		\$22.11	
BRISSETTE, BRENDA JONES	BRISSETTE, BRENDA JONES		3805 KARRINGTON PL		MONROE, NC 28110	Proration	0058983629	THR4431	AUTHORIZED	760308654	Refund Generated due to proration on Bill #0058983629-2023-2023-0000-00	Vehicle Sold	#####	11/27/2024	001	TAX	(\$10.67)	\$0.00	(\$10.67)
															200	TAX	(\$32.86)	\$0.00	(\$32.86)
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															003	TAX	(\$1.14)	\$0.00	(\$1.14)
															005	TAX	(\$0.25)	\$0.00	(\$0.25)
															004	TAX	(\$1.91)	\$0.00	(\$1.91)
															002	TAX	(\$24.47)	\$0.00	(\$24.47)
Refund																		\$71.30	
BYRUM, KEYNAN LYNN	BYRUM, KEYNAN LYNN		7106 INDIAN TRAIL-FAIRVIE		INDIAN TRAIL, NC 28079	Adjustment < \$100	0080448503	LEF1317	PENDING	865090728	Refund Generated due to adjustment on Bill #0080448503-2024-2024-0000	Situs error	11/5/2024	001	TAX	\$0.00	\$0.00	\$0.00	
														200	TAX	(\$13.97)	\$0.00	(\$13.97)	
														200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
														023	TAX	\$1.42	\$0.00	\$1.42	
														003	TAX	\$0.00	\$0.00	\$0.00	
														005	TAX	\$0.00	\$0.00	\$0.00	
														004	TAX	\$0.00	\$0.00	\$0.00	
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																		\$42.55	
CACHELIN, AIDAN BOGDAN	CACHELIN, AIDAN BOGDAN		3747 MATTHEWS INDIAN	TRAIL RD STE 500	STALLINGS, NC 28104	Adjustment < \$100	0080602974	LEF1571	PENDING	973226700	Refund Generated due to adjustment on Bill #0080602974-2024-2024-0000	Situs error	11/5/2024	001	TAX	\$0.00	\$0.00	\$0.00	
														200	TAX	(\$3.37)	\$0.00	(\$3.37)	
														200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
														700	TAX	\$1.45	\$0.00	\$1.45	
														020	TAX	\$0.36	\$0.00	\$0.36	
														003	TAX	\$0.00	\$0.00	\$0.00	
														005	TAX	\$0.00	\$0.00	\$0.00	
004	TAX	\$0.00	\$0.00	\$0.00															
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																		\$31.56	
CAMPBELL, RYAN CHRISTOPHER	CAMPBELL, RYAN CHRISTOPHER		608 CONSTABLE DR		CHESAPEAKE, VA 23322	Proration	0075867216	R3P7273	AUTHORIZED	650201484	Refund Generated due to proration on Bill #0075867216-2023-2023-0000-00	Vehicle Sold	#####	11/18/2024	001	TAX	(\$9.45)	\$0.00	(\$9.45)
															015	TAX	(\$2.68)	\$0.00	(\$2.68)
															003	TAX	(\$1.01)	\$0.00	(\$1.01)
															005	TAX	(\$0.22)	\$0.00	(\$0.22)
															004	TAX	(\$1.69)	\$0.00	(\$1.69)
															002	TAX	(\$21.66)	\$0.00	(\$21.66)
															Refund				
CAMPBELL, SUSAN DORIS	CAMPBELL, SUSAN DORIS		608 CONSTABLE DR		CHESAPEAKE, VA 23322	Proration	0079349809	RJE2358	AUTHORIZED	650201472	Refund Generated due to proration on Bill #0079349809-2024-2024-0000-00	Vehicle Sold	#####	11/18/2024	001	TAX	(\$20.89)	\$0.00	(\$20.89)
															015	TAX	(\$7.07)	\$0.00	(\$7.07)
															003	TAX	(\$2.24)	\$0.00	(\$2.24)
															005	TAX	(\$0.50)	\$0.00	(\$0.50)
															004	TAX	(\$3.74)	\$0.00	(\$3.74)
															002	TAX	(\$47.90)	\$0.00	(\$47.90)
															Refund				
CHEEK, ERIC BERTIL	CHEEK, ERIC BERTIL		905 OLIVE HILL LN		MATTHEWS, NC 28104	Proration	0043165972	FHE1601	AUTHORIZED	648787230	Refund Generated due to proration on Bill #0043165972-2023-2023-0000-00	Vehicle Sold	11/4/2024	11/5/2024	001	TAX	(\$2.39)	\$0.00	(\$2.39)
															026	TAX	(\$0.55)	\$0.00	(\$0.55)
															003	TAX	(\$0.26)	\$0.00	(\$0.26)
															005	TAX	(\$0.06)	\$0.00	(\$0.06)
															004	TAX	(\$0.43)	\$0.00	(\$0.43)
															002	TAX	(\$5.48)	\$0.00	(\$5.48)
															Refund				
CLASSIC COMMERCIAL CARPETCLEANING INC	CLASSIC COMMERCIAL CARPETCLEANING INC		PO BOX 3094		MATTHEWS, NC 28106	Adjustment < \$100	0068766271	TLP7918	PENDING	756920080	Refund Generated due to adjustment on Bill #0068766271-2024-2024-0000-00	Mileage	11/4/2024	001	TAX	(\$6.71)	\$0.00	(\$6.71)	
														600	TAX	(\$7.61)	\$0.00	(\$7.61)	
														019	TAX	(\$2.63)	\$0.00	(\$2.63)	
														003	TAX	(\$0.72)	\$0.00	(\$0.72)	
														005	TAX	(\$0.16)	\$0.00	(\$0.16)	
														004	TAX	(\$1.20)	\$0.00	(\$1.20)	
														002	TAX	(\$15.38)	\$0.00	(\$15.38)	
Refund																		\$34.44	
CLASSIC COMMERCIAL CARPETCLEANING INC	CLASSIC COMMERCIAL CARPETCLEANING INC		PO BOX 3094		MATTHEWS, NC 28106	Adjustment < \$100	0068766520	TLP7919	PENDING	756953407	Refund Generated due to adjustment on Bill #0068766520-2024-2024-0000-00	Mileage	11/5/2024	001	TAX	(\$2.70)	\$0.00	(\$2.70)	
														600	TAX	(\$3.07)	\$0.00	(\$3.07)	
														019	TAX	(\$1.05)	\$0.00	(\$1.05)	
														003	TAX	(\$0.29)	\$0.00	(\$0.29)	
														005	TAX	(\$0.06)	\$0.00	(\$0.06)	
														004	TAX	(\$0.49)	\$0.00	(\$0.49)	
														002	TAX	(\$6.19)	\$0.00	(\$6.19)	
Refund																		\$13.85	



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
COLLINS, LAURENCE EMERTH	COLLINS, LAURENCE EMERTH		2311 WINDING OAKS TRL	WAXHAW, NC 28173	Proration	0060618272	TOR7051	AUTHORIZED	758136841	Refund Generated due to proration on Bill #0060618272-2023-2023-0000-00	Vehicle Sold	#####	11/14/2024	001	TAX	(\$8.83)	\$0.00	(\$8.83)	
														990	TAX	(\$1.13)	\$0.00	(\$1.13)	
														015	TAX	(\$2.51)	\$0.00	(\$2.51)	
														003	TAX	(\$0.94)	\$0.00	(\$0.94)	
														005	TAX	(\$0.21)	\$0.00	(\$0.21)	
														004	TAX	(\$1.58)	\$0.00	(\$1.58)	
														002	TAX	(\$20.23)	\$0.00	(\$20.23)	
Refund																			
\$35.43																			
CSE HARDWOOD FLOORS LLC	CSE HARDWOOD FLOORS LLC		4816 WAXHAW INDIAN TRAIL RD	MATTHEWS, NC 28104	Adjustment < \$100	0080856709	VH8122	PENDING	865090288	Refund Generated due to adjustment on Bill #0080856709-2024-2024-0000	Situs error	11/5/2024		001	TAX	\$0.00	\$0.00	\$0.00	
														200	TAX	(\$57.34)	\$0.00	(\$57.34)	
														200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
														026	TAX	\$4.54	\$0.00	\$4.54	
														003	TAX	\$0.00	\$0.00	\$0.00	
														005	TAX	\$0.00	\$0.00	\$0.00	
														004	TAX	\$0.00	\$0.00	\$0.00	
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																			
\$82.80																			
CUMMINGS CONSTRUCTION CORPORATION	CUMMINGS CONSTRUCTION CORPORATION		PO BOX 692	MATTHEWS, NC 28106	Proration	0042845233	5XW1739	AUTHORIZED	756149128	Refund Generated due to proration on Bill #0042845233-2023-2023-0000-00	Vehicle Sold	11/1/2024	11/4/2024	001	TAX	(\$30.71)	\$0.00	(\$30.71)	
														700	TAX	(\$35.01)	\$0.00	(\$35.01)	
														020	TAX	(\$8.99)	\$0.00	(\$8.99)	
														003	TAX	(\$3.29)	\$0.00	(\$3.29)	
														005	TAX	(\$0.73)	\$0.00	(\$0.73)	
														004	TAX	(\$5.49)	\$0.00	(\$5.49)	
														002	TAX	(\$70.42)	\$0.00	(\$70.42)	
Refund																			
\$154.64																			
DECKER, JANIE KAREN	DECKER, JANIE KAREN		1637 WAXHAW IND TRL RD S	WAXHAW, NC 28173	Adjustment < \$100	0080534222	VE88268	PENDING	865090800	Refund Generated due to adjustment on Bill #0080534222-2024-2024-0000	Situs error	11/5/2024		001	TAX	\$0.00	\$0.00	\$0.00	
														200	TAX	(\$19.25)	\$0.00	(\$19.25)	
														200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
														026	TAX	\$1.52	\$0.00	\$1.52	
														003	TAX	\$0.00	\$0.00	\$0.00	
														005	TAX	\$0.00	\$0.00	\$0.00	
														004	TAX	\$0.00	\$0.00	\$0.00	
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																			
\$47.73																			
DEGANI, MICHAEL	DEGANI, MICHAEL		1009 ARGENTILUM WAY	WAXHAW, NC 28173	Proration	0065773374	HB23206	AUTHORIZED	866721528	Refund Generated due to proration on Bill #0065773374-2023-2023-0000-00	Vehicle Sold	#####	11/15/2024	11/15/2024	001	TAX	(\$17.51)	\$0.00	(\$17.51)
															500	TAX	(\$41.30)	\$0.00	(\$41.30)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$4.49)	\$0.00	(\$4.49)
															003	TAX	(\$1.88)	\$0.00	(\$1.88)
															005	TAX	(\$0.42)	\$0.00	(\$0.42)
															004	TAX	(\$3.13)	\$0.00	(\$3.13)
002	TAX	(\$40.14)	\$0.00	(\$40.14)															
Refund																			
\$108.87																			
DEPOLLO, DONNA JUNE	DEPOLLO, DONNA JUNE	DEPOLLO, JOHN CHARLES JR	8922 CUMBERLAND CT	WAXHAW, NC 28173	Proration	0028802714	HME6477	AUTHORIZED	650636274	Refund Generated due to proration on Bill #0028802714-2023-2023-0000-00	Vehicle Sold	#####	11/19/2024	11/19/2024	001	TAX	(\$6.54)	\$0.00	(\$6.54)
															026	TAX	(\$1.50)	\$0.00	(\$1.50)
															003	TAX	(\$0.70)	\$0.00	(\$0.70)
															005	TAX	(\$0.16)	\$0.00	(\$0.16)
															004	TAX	(\$1.17)	\$0.00	(\$1.17)
															002	TAX	(\$15.00)	\$0.00	(\$15.00)
															Refund				
\$25.07																			
DOUGLAS, DONNA MARLENE	DOUGLAS, DONNA MARLENE		8528 SUNSET HILL RD	WAXHAW, NC 28173	Proration	0064372866	JD26721	AUTHORIZED	865089664	Refund Generated due to proration on Bill #0064372866-2023-2023-0000-00	Vehicle Totalled	11/5/2024	11/6/2024	001	TAX	(\$9.60)	\$0.00	(\$9.60)	
														500	TAX	(\$22.65)	\$0.00	(\$22.65)	
														500	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
														028	TAX	(\$2.47)	\$0.00	(\$2.47)	
														003	TAX	(\$1.03)	\$0.00	(\$1.03)	
														005	TAX	(\$0.23)	\$0.00	(\$0.23)	
														004	TAX	(\$1.72)	\$0.00	(\$1.72)	
002	TAX	(\$22.02)	\$0.00	(\$22.02)															
Refund																			
\$59.72																			
DOYLE, JOHN DAVID	DOYLE, JOHN DAVID		2704 ARSDALE RD	WAXHAW, NC 28173	Proration	0078931470	ZSA6933	AUTHORIZED	649831494	Refund Generated due to proration on Bill #0078931470-2023-2023-0000-00	Vehicle Sold	#####	11/14/2024	11/14/2024	001	TAX	(\$11.26)	\$0.00	(\$11.26)
															800	TAX	(\$3.11)	\$0.00	(\$3.11)
															003	TAX	(\$1.21)	\$0.00	(\$1.21)
															005	TAX	(\$0.27)	\$0.00	(\$0.27)
															004	TAX	(\$2.01)	\$0.00	(\$2.01)
															002	TAX	(\$25.82)	\$0.00	(\$25.82)
															Refund				
\$43.68																			
FARMER, BRET WILLIAM	FARMER, BRET WILLIAM		6604 OLD RIDGE RD	WAXHAW, NC 28173	Proration	0065161656	EJX6500	AUTHORIZED	650862780	Refund Generated due to proration on Bill #0065161656-2023-2023-0000-00	Vehicle Totalled	#####	11/21/2024	11/21/2024	001	TAX	(\$2.73)	\$0.00	(\$2.73)
															028	TAX	(\$0.70)	\$0.00	(\$0.70)
															003	TAX	(\$0.29)	\$0.00	(\$0.29)
															005	TAX	(\$0.07)	\$0.00	(\$0.07)
															004	TAX	(\$0.49)	\$0.00	(\$0.49)
															002	TAX	(\$6.25)	\$0.00	(\$6.25)
															Refund				
\$10.53																			



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
FINN, HEATHER DAWN	FINN, HEATHER DAWN	FINN, SHANE PATRICK	1182 HERITAGE CT		FORT MILL, SC 29715	Proration	0059827948	L026IC	AUTHORIZED	758381575	Refund Generated due to proration on Bill #0059827948-2023-2023-0000-00	Reg . Out of state	#####	11/15/2024	001	TAX	(\$13.73)	\$0.00	(\$13.73)
															990	TAX	(\$1.77)	\$0.00	(\$1.77)
															015	TAX	(\$3.91)	\$0.00	(\$3.91)
															003	TAX	(\$1.47)	\$0.00	(\$1.47)
															005	TAX	(\$0.32)	\$0.00	(\$0.32)
															004	TAX	(\$2.46)	\$0.00	(\$2.46)
															002	TAX	(\$31.49)	\$0.00	(\$31.49)
Refund																	\$55.15		
FINN, SHANE PATRICK	FINN, SHANE PATRICK	FINN, HEATHER DAWN	1182 HERITAGE CT		FORT MILL, SC 29715	Proration	0074287782	WINC	AUTHORIZED	758381582	Refund Generated due to proration on Bill #0074287782-2023-2023-0000-00	Reg . Out of state	#####	11/15/2024	001	TAX	(\$31.92)	\$0.00	(\$31.92)
															990	TAX	(\$4.11)	\$0.00	(\$4.11)
															015	TAX	(\$9.07)	\$0.00	(\$9.07)
															003	TAX	(\$3.42)	\$0.00	(\$3.42)
															005	TAX	(\$0.76)	\$0.00	(\$0.76)
															004	TAX	(\$5.71)	\$0.00	(\$5.71)
															002	TAX	(\$73.19)	\$0.00	(\$73.19)
Refund																	\$128.18		
FLORES, JULIO CESAR	FLORES, JULIO CESAR		4149 OCONNELL ST		INDIAN TRAIL, NC 28079	Proration	0072611057	KHE2054	AUTHORIZED	759338566	Refund Generated due to proration on Bill #0072611057-2023-2023-0000-00	Vehicle Sold	#####	11/21/2023	001	TAX	(\$2.42)	\$0.00	(\$2.42)
															200	TAX	(\$7.46)	\$0.00	(\$7.46)
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															003	TAX	(\$0.26)	\$0.00	(\$0.26)
															005	TAX	(\$0.06)	\$0.00	(\$0.06)
															004	TAX	(\$0.43)	\$0.00	(\$0.43)
															002	TAX	(\$5.55)	\$0.00	(\$5.55)
Refund																	\$6.18		
FREEDOM HOME IMPROVEMENT, I NC	FREEDOM HOME IMPROVEMENT, I NC		6210 TOWNSEND LN		WAXHAW, NC 28173	Proration	0059332807	RAZ7417	AUTHORIZED	650665770	Refund Generated due to proration on Bill #0059332807-2023-2023-0000-00	Vehicle Sold	#####	11/20/2024	001	TAX	(\$11.95)	\$0.00	(\$11.95)
															028	TAX	(\$3.07)	\$0.00	(\$3.07)
															003	TAX	(\$1.28)	\$0.00	(\$1.28)
															005	TAX	(\$0.29)	\$0.00	(\$0.29)
															004	TAX	(\$2.13)	\$0.00	(\$2.13)
															002	TAX	(\$27.39)	\$0.00	(\$27.39)
															Refund				
GADDY, ALBERT AUSTIN	GADDY, ALBERT AUSTIN		2449 OAKSPRING RD		MATTHEWS, NC 28104	Proration	0009113463	TMS087	AUTHORIZED	759107797	Refund Generated due to proration on Bill #0009113463-2024-2024-0000-00	Vehicle Sold	#####	11/20/2024	001	TAX	(\$3.44)	\$0.00	(\$3.44)
															700	TAX	(\$4.56)	\$0.00	(\$4.56)
															020	TAX	(\$1.13)	\$0.00	(\$1.13)
															003	TAX	(\$0.37)	\$0.00	(\$0.37)
															005	TAX	(\$0.08)	\$0.00	(\$0.08)
															004	TAX	(\$0.62)	\$0.00	(\$0.62)
															002	TAX	(\$7.90)	\$0.00	(\$7.90)
Refund																	\$18.10		
GANLEY, ROBERT STEVEN	GANLEY, ROBERT STEVEN		3038 DEEP RIVER WAY		WAXHAW, NC 28173	Proration	0080433038	LDP3533	AUTHORIZED	867554000	Refund Generated due to proration on Bill #0080433038-2024-2024-0000-00	Vehicle Sold	#####	11/20/2024	001	TAX	(\$53.71)	\$0.00	(\$53.71)
															500	TAX	(\$126.70)	\$0.00	(\$126.70)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$17.21)	\$0.00	(\$17.21)
															003	TAX	(\$5.76)	\$0.00	(\$5.76)
															005	TAX	(\$1.28)	\$0.00	(\$1.28)
															004	TAX	(\$9.61)	\$0.00	(\$9.61)
002	TAX	(\$123.14)	\$0.00	(\$123.14)															
Refund																	\$337.41		
GIBBONS, CYNTHIA ANN	GIBBONS, CYNTHIA ANN	GIBBONS, PETER FORREST	1020 LIGGETTS DR		WEDDINGTON, NC 28104	Proration	0067107468	JHE4164	AUTHORIZED	651692274	Refund Generated due to proration on Bill #0067107468-2023-2023-0000-00	Vehicle Sold	#####	11/27/2024	001	TAX	(\$15.06)	\$0.00	(\$15.06)
															800	TAX	(\$4.15)	\$0.00	(\$4.15)
															003	TAX	(\$1.61)	\$0.00	(\$1.61)
															005	TAX	(\$0.36)	\$0.00	(\$0.36)
															004	TAX	(\$2.69)	\$0.00	(\$2.69)
															002	TAX	(\$34.53)	\$0.00	(\$34.53)
															Refund				
GLORY TRANSPORT SERVICE LLC	GLORY TRANSPORT SERVICE LLC		2003 SEDWICK RD		INDIAN TRAIL, NC 28079	Adjustment < \$100	0080806878	ZT2625	PENDING	973226160	Refund Generated due to adjustment on Bill #0080806878-2024-2024-0000	Situs error	11/5/2024	001	TAX	\$0.00	\$0.00	\$0.00	
														600	TAX	\$27.95	\$0.00	\$27.95	
														200	TAX	(\$75.93)	\$0.00	(\$75.93)	
														200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
														023	TAX	\$7.74	\$0.00	\$7.74	
														003	TAX	\$0.00	\$0.00	\$0.00	
														005	TAX	\$0.00	\$0.00	\$0.00	
004	TAX	\$0.00	\$0.00	\$0.00															
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$70.24		
GODFREY INVESTMENT SERVICES INC	GODFREY INVESTMENT SERVICES INC		1308 LOOKOUT CIR		WAXHAW, NC 28173	Proration	0067829257	HDV3060	AUTHORIZED	650636388	Refund Generated due to proration on Bill #0067829257-2024-2024-0000-00	Vehicle Sold	#####	11/19/2024	001	TAX	(\$105.15)	\$0.00	(\$105.15)
															026	TAX	(\$25.64)	\$0.00	(\$25.64)
															003	TAX	(\$11.28)	\$0.00	(\$11.28)
															005	TAX	(\$2.51)	\$0.00	(\$2.51)
															004	TAX	(\$18.81)	\$0.00	(\$18.81)
															002	TAX	(\$241.10)	\$0.00	(\$241.10)
															Refund				



North Carolina Vehicle Tax System

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Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
GOEDICKE, JERAMIE LYNN	GOEDICKE, JERAMIE LYNN		2846 OLD CHARLOTTE HWY		MONROE, NC 28110	Adjustment < \$100	0080266163	CR78618	PENDING	649204122	Refund Generated due to adjustment on Bill #0080266163-2024-2024-0000-00	Over Assessment	11/7/2024		001	TAX	(\$11.54)	\$0.00	(\$11.54)
															200	TAX	(\$35.55)	\$0.00	(\$35.55)
															003	TAX	(\$1.24)	\$0.00	(\$1.24)
															005	TAX	(\$0.28)	\$0.00	(\$0.28)
															004	TAX	(\$2.07)	\$0.00	(\$2.07)
															002	TAX	(\$26.47)	\$0.00	(\$26.47)
															Refund				
\$77.15																			
GOODMAN, PHILIP SCOTT	GOODMAN, PHILIP SCOTT		5096 CAMBRIDGE OAKS DR		MATTHEWS, NC 28104	Proration	0075951554	TM28210	AUTHORIZED	648817266	Refund Generated due to proration on Bill #0075951554-2023-2023-0000-00	Vehicle Sold	11/5/2024	11/6/2024	001	TAX	(\$130.69)	\$0.00	(\$130.69)
															800	TAX	(\$36.03)	\$0.00	(\$36.03)
															003	TAX	(\$14.01)	\$0.00	(\$14.01)
															005	TAX	(\$3.12)	\$0.00	(\$3.12)
															004	TAX	(\$23.38)	\$0.00	(\$23.38)
															002	TAX	(\$299.65)	\$0.00	(\$299.65)
															Refund				
\$506.88																			
GROVER, ROSY	GROVER, ROSY		605 LARK HALL COURT		MARVIN, NC 28173	Proration	0026841842	DEX3909	AUTHORIZED	865091728	Refund Generated due to proration on Bill #0026841842-2023-2023-0000-00	Vehicle Sold	11/5/2024	11/6/2024	001	TAX	(\$5.57)	(\$0.27)	(\$5.84)
															101	TAX	(\$2.05)	(\$0.10)	(\$2.15)
															101	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															026	TAX	(\$1.28)	(\$0.07)	(\$1.35)
															003	TAX	(\$0.60)	(\$0.03)	(\$0.63)
															005	TAX	(\$0.13)	(\$0.01)	(\$0.14)
															004	TAX	(\$1.00)	(\$0.05)	(\$1.05)
002	TAX	(\$12.77)	(\$0.64)	(\$13.41)															
Refund																			
\$24.57																			
HABBAL, FADI RACHID	HABBAL, FADI RACHID		1416 E BRIEF RD		MONROE, NC 28110	Proration	0077792376	FFF4575	AUTHORIZED	758135819	Refund Generated due to proration on Bill #0077792376-2023-2023-0000-00	Vehicle Sold	#####	11/14/2024	001	TAX	(\$43.15)	\$0.00	(\$43.15)
															930	TAX	(\$5.29)	\$0.00	(\$5.29)
															016	TAX	(\$13.30)	\$0.00	(\$13.30)
															003	TAX	(\$4.63)	\$0.00	(\$4.63)
															005	TAX	(\$1.03)	\$0.00	(\$1.03)
															004	TAX	(\$7.72)	\$0.00	(\$7.72)
															002	TAX	(\$98.93)	\$0.00	(\$98.93)
Refund																			
\$174.05																			
HABBAL, FADI RACHID	HABBAL, FADI RACHID		1416 E BRIEF RD		MONROE, NC 28110	Proration	0064340988	ELD1809	AUTHORIZED	758135833	Refund Generated due to proration on Bill #0064340988-2023-2023-0000-00	Vehicle Sold	#####	11/14/2024	001	TAX	(\$10.98)	\$0.00	(\$10.98)
															930	TAX	(\$1.35)	\$0.00	(\$1.35)
															016	TAX	(\$3.38)	\$0.00	(\$3.38)
															003	TAX	(\$1.18)	\$0.00	(\$1.18)
															005	TAX	(\$0.25)	\$0.00	(\$0.25)
															004	TAX	(\$1.97)	\$0.00	(\$1.97)
															002	TAX	(\$25.18)	\$0.00	(\$25.18)
Refund																			
\$44.30																			
HAGMAIER, ROBERT DAVID	HAGMAIER, ROBERT DAVID		3204 BRIDGEMICK RD		WAXHAW, NC 28173	Proration	0071677897	HF25284	AUTHORIZED	866720400	Refund Generated due to proration on Bill #0071677897-2023-2023-0000-00	Vehicle Sold	#####	11/15/2024	001	TAX	(\$31.36)	(\$1.56)	(\$32.92)
															500	TAX	(\$73.98)	(\$3.70)	(\$77.68)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$8.05)	(\$0.41)	(\$8.46)
															003	TAX	(\$3.36)	(\$0.16)	(\$3.52)
															005	TAX	(\$0.75)	(\$0.04)	(\$0.79)
															004	TAX	(\$5.61)	(\$0.28)	(\$5.89)
002	TAX	(\$71.91)	(\$3.60)	(\$75.51)															
Refund																			
\$204.77																			
HARKEY, JOYCE LANEY	HARKEY, JOYCE LANEY		4823 BEULAH CHURCH RD		MATTHEWS, NC 28104	Proration	0016578748	JKV5353	AUTHORIZED	648127752	Refund Generated due to proration on Bill #0016578748-2023-2023-0000-00	Vehicle Sold	11/1/2024	11/4/2024	001	TAX	(\$2.42)	\$0.00	(\$2.42)
															800	TAX	(\$0.66)	\$0.00	(\$0.66)
															003	TAX	(\$0.26)	\$0.00	(\$0.26)
															005	TAX	(\$0.06)	\$0.00	(\$0.06)
															004	TAX	(\$0.43)	\$0.00	(\$0.43)
															002	TAX	(\$5.54)	\$0.00	(\$5.54)
															Refund				
\$9.37																			
HAZELBAKER, MATTHEW THOMAS	HAZELBAKER, MATTHEW THOMAS		7616 CICLE DR		INDIAN TRAIL, NC 28079	Adjustment < \$100	0080583843	RJS5003	PENDING	865090352	Refund Generated due to adjustment on Bill #0080583843-2024-2024-0000	Situs error	11/5/2024		001	TAX	\$0.00	\$0.00	\$0.00
															200	TAX	(\$20.65)	\$0.00	(\$20.65)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															023	TAX	\$2.10	\$0.00	\$2.10
															003	TAX	\$0.00	\$0.00	\$0.00
															005	TAX	\$0.00	\$0.00	\$0.00
															004	TAX	\$0.00	\$0.00	\$0.00
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																			
\$48.55																			
HEATH, GEORGE SCOTT JR	HEATH, GEORGE SCOTT JR		1721 CARMEL CHURCH RD		MONROE, NC 28112	Adjustment < \$100	0080680534	FCA4221	PENDING	865052208	Refund Generated due to adjustment on Bill #0080680534-2024-2024-0000	Situs error	11/4/2024		001	TAX	\$0.00	\$0.00	\$0.00
															200	TAX	(\$47.69)	\$0.00	(\$47.69)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															013	TAX	\$2.17	\$0.00	\$2.17
															003	TAX	\$0.00	\$0.00	\$0.00
															005	TAX	\$0.00	\$0.00	\$0.00
															004	TAX	\$0.00	\$0.00	\$0.00
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																			
\$75.52																			



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change													
HELMS, JAMES ANTHONY JR	HELMS, JAMES ANTHONY JR		1122 N ROCKY RIVER RD	ROAD	MONROE, NC 28110	Adjustment < \$100	0080531313	R1L6541	PENDING	865090768	Refund Generated due to adjustment on Bill #0080531313-2024-2024-0000	Situs error	11/5/2024		001	TAX	\$0.00	\$0.00	\$0.00													
															200	TAX	(\$42.51)	\$0.00	(\$42.51)													
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)													
															019	TAX	\$5.40	\$0.00	\$5.40													
															003	TAX	\$0.00	\$0.00	\$0.00													
															005	TAX	\$0.00	\$0.00	\$0.00													
															004	TAX	\$0.00	\$0.00	\$0.00													
															002	TAX	\$0.00	\$0.00	\$0.00													
															Refund																	
															\$67.11																	
HELMS, KEVIN DOUGLAS	HELMS, KEVIN DOUGLAS		852 LANGLEY DR		CHESTER, SC 29706	Proration	0073009472	TJ2631	AUTHORIZED	648817122	Refund Generated due to proration on Bill #0073009472-2023-2023-0000-00	Reg. Out of state	11/5/2024	11/6/2024	001	TAX	(\$51.73)	\$0.00	(\$51.73)													
															800	TAX	(\$14.25)	\$0.00	(\$14.25)													
															003	TAX	(\$5.55)	\$0.00	(\$5.55)													
															005	TAX	(\$1.24)	\$0.00	(\$1.24)													
															004	TAX	(\$9.26)	\$0.00	(\$9.26)													
															002	TAX	(\$118.61)	\$0.00	(\$118.61)													
Refund																																
\$200.65																																
HELMS, KEVIN DOUGLAS	HELMS, KEVIN DOUGLAS		852 LANGLEY DR		CHESTER, SC 29706	Proration	0073009512	TJ2632	AUTHORIZED	648817134	Refund Generated due to proration on Bill #0073009512-2023-2023-0000-00	Reg. Out of state	11/5/2024	11/6/2024	001	TAX	(\$26.16)	\$0.00	(\$26.16)													
															800	TAX	(\$7.22)	\$0.00	(\$7.22)													
															003	TAX	(\$2.81)	\$0.00	(\$2.81)													
															005	TAX	(\$0.62)	\$0.00	(\$0.62)													
															004	TAX	(\$4.68)	\$0.00	(\$4.68)													
															002	TAX	(\$59.98)	\$0.00	(\$59.98)													
Refund																																
\$101.47																																
HILL, BENJAMIN JAMES	HILL, BENJAMIN JAMES		6001 BROOK VALLEY RUN		MONROE, NC 28110	Proration	0074063930	EH33589	AUTHORIZED	757205813	Refund Generated due to proration on Bill #0074063930-2023-2023-0000-00	Vehicle Sold	11/6/2024	11/7/2024	001	TAX	(\$5.01)	(\$0.24)	(\$5.25)													
															600	TAX	(\$5.68)	(\$0.28)	(\$5.96)													
															019	TAX	(\$1.60)	(\$0.08)	(\$1.68)													
															003	TAX	(\$0.54)	(\$0.03)	(\$0.57)													
															005	TAX	(\$0.12)	(\$0.01)	(\$0.13)													
															004	TAX	(\$0.90)	(\$0.05)	(\$0.95)													
002	TAX	(\$11.49)	(\$0.58)	(\$12.07)																												
Refund																																
\$26.61																																
HILLIARD, HENRY COLLINS III	HILLIARD, HENRY COLLINS III		1811 FLAT ROCK DR		MONROE, NC 28110	Proration	0074937439	JARS154	AUTHORIZED	757577219	Refund Generated due to proration on Bill #0074937439-2023-2023-0000-00	Vehicle Sold	11/8/2024	11/12/2024	001	TAX	(\$17.48)	\$0.00	(\$17.48)													
															980	TAX	(\$2.14)	\$0.00	(\$2.14)													
															021	TAX	(\$6.57)	\$0.00	(\$6.57)													
															003	TAX	(\$1.87)	\$0.00	(\$1.87)													
															005	TAX	(\$0.42)	\$0.00	(\$0.42)													
															004	TAX	(\$3.13)	\$0.00	(\$3.13)													
002	TAX	(\$40.08)	\$0.00	(\$40.08)																												
Refund																																
\$71.69																																
IBRAHIMOV, TURAL	IBRAHIMOV, TURAL		810 SCENIC WAY		MATTHEWS, NC 28104	Proration	0080284745	VDZ4829	AUTHORIZED	757205827	Refund Generated due to proration on Bill #0080284745-2024-2024-0000-00	Vehicle Sold	11/6/2024	11/7/2024	001	TAX	(\$10.13)	\$0.00	(\$10.13)													
															700	TAX	(\$13.41)	\$0.00	(\$13.41)													
															020	TAX	(\$3.32)	\$0.00	(\$3.32)													
															003	TAX	(\$1.08)	\$0.00	(\$1.08)													
															005	TAX	(\$0.24)	\$0.00	(\$0.24)													
															004	TAX	(\$1.82)	\$0.00	(\$1.82)													
002	TAX	(\$23.23)	\$0.00	(\$23.23)																												
Refund																																
\$53.23																																
JOHNSON, CASSANDRA LATRESE	JOHNSON, CASSANDRA LATRESE	JOHNSON, LACREASHA ALISE	827 SEBRING DR	APT 208	ROCK HILL, SC 29730	Proration	0050855220	T8N706	AUTHORIZED	756918519	Refund Generated due to proration on Bill #0050855220-2023-2023-0000-00	Reg. Out of state	11/4/2024	11/5/2024	001	TAX	(\$4.31)	(\$0.21)	(\$4.52)													
															200	TAX	(\$13.27)	(\$0.67)	(\$13.94)													
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00													
															003	TAX	(\$0.46)	(\$0.02)	(\$0.48)													
															005	TAX	(\$0.10)	(\$0.01)	(\$0.11)													
															004	TAX	(\$0.77)	(\$0.04)	(\$0.81)													
002	TAX	(\$9.88)	(\$0.49)	(\$10.37)																												
Refund																																
\$30.23																																
JOHNSON, CASSANDRA LATRESE	JOHNSON, CASSANDRA LATRESE		827 SEBRING DR	APT 208	ROCK HILL, SC 29730	Proration	0055711992	H0R5363	AUTHORIZED	760611789	Refund Generated due to proration on Bill #0055711992-2023-2023-0000-00	Reg. Out of state	#####	12/2/2024	001	TAX	(\$15.21)	\$0.00	(\$15.21)													
															200	TAX	(\$46.83)	\$0.00	(\$46.83)													
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00													
															003	TAX	(\$1.63)	\$0.00	(\$1.63)													
															005	TAX	(\$0.37)	\$0.00	(\$0.37)													
															004	TAX	(\$2.72)	\$0.00	(\$2.72)													
002	TAX	(\$34.87)	\$0.00	(\$34.87)																												
Refund																																
\$101.63																																
JOHNSON, GREGORY RAY	JOHNSON, GREGORY RAY	JOHNSON, JOY TRINH	2310 HIGHLAND FOREST DR		WAXHAW, NC 28173	Proration	0057524885	RBE3041	AUTHORIZED	865052232	Refund Generated due to proration on Bill #0057524885-2023-2023-0000-00	Vehicle Sold	11/4/2024	11/5/2024	001	TAX	(\$1.16)	\$0.00	(\$1.16)													
															101	TAX	(\$0.42)	\$0.00	(\$0.42)													
															101	VEHICLE FEE	\$0.00	\$0.00	\$0.00													
															026	TAX	(\$0.27)	\$0.00	(\$0.27)													
															003	TAX	(\$0.12)	\$0.00	(\$0.12)													
															005	TAX	(\$0.03)	\$0.00	(\$0.03)													
004	TAX	(\$0.21)	\$0.00	(\$0.21)																												
002	TAX	(\$2.66)	\$0.00	(\$2.66)																												
Refund																																
\$4.87																																



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
KETH, TERRY JAY	KETH, TERRY JAY		4719 PIMLICO LN		WAXHAW, NC 28173	Proration	0064815546	KC4192	AUTHORIZED	650664642	Refund Generated due to proration on Bill #0064815546-2023-2023-0000-00	Vehicle Sold	#####	11/20/2024	001	TAX	(\$36.63)	\$0.00	(\$36.63)
															028	TAX	(\$9.41)	\$0.00	(\$9.41)
															003	TAX	(\$3.93)	\$0.00	(\$3.93)
															005	TAX	(\$0.88)	\$0.00	(\$0.88)
															004	TAX	(\$6.55)	\$0.00	(\$6.55)
															002	TAX	(\$84.00)	\$0.00	(\$84.00)
															Refund			\$141.40	
KIRYLENKA, PAVEL	KIRYLENKA, PAVEL		1307 TRULL PL		MONROE, NC 28110	Proration	0068222749	J3R3188	AUTHORIZED	756150241	Refund Generated due to proration on Bill #0068222749-2023-2023-0000-00	Vehicle Totalled	11/1/2024	11/4/2024	001	TAX	(\$4.46)	\$0.00	(\$4.46)
															200	TAX	(\$13.73)	\$0.00	(\$13.73)
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															003	TAX	(\$0.48)	\$0.00	(\$0.48)
															005	TAX	(\$0.11)	\$0.00	(\$0.11)
															004	TAX	(\$0.80)	\$0.00	(\$0.80)
															002	TAX	(\$10.23)	\$0.00	(\$10.23)
Refund			\$29.81		\$29.81														
KONDAMURI, BALASUDHAKAR	KONDAMURI, BALASUDHAKAR		1011 GARDEN WEB RD		INDIAN TRAIL, NC 28079	Proration	0076495807	TPP5274	AUTHORIZED	759338643	Refund Generated due to proration on Bill #0076495807-2023-2023-0000-00	Vehicle Sold	#####	11/21/2024	001	TAX	(\$13.50)	\$0.00	(\$13.50)
															970	TAX	(\$1.06)	\$0.00	(\$1.06)
															026	TAX	(\$3.10)	\$0.00	(\$3.10)
															003	TAX	(\$1.45)	\$0.00	(\$1.45)
															005	TAX	(\$0.32)	\$0.00	(\$0.32)
															004	TAX	(\$2.41)	\$0.00	(\$2.41)
															002	TAX	(\$30.96)	\$0.00	(\$30.96)
Refund			\$52.80		\$52.80														
KOZLOWSKI, WILLIAM JACOB JR	KOZLOWSKI, WILLIAM JACOB JR		308 SARA LN		MONROE, NC 28112	Proration	0073135875	JAT4961	AUTHORIZED	651952974	Refund Generated due to proration on Bill #0073135875-2023-2023-0000-00	Vehicle Sold	#####	12/2/2024	001	TAX	(\$44.96)	\$0.00	(\$44.96)
															013	TAX	(\$5.51)	\$0.00	(\$5.51)
															003	TAX	(\$4.82)	\$0.00	(\$4.82)
															005	TAX	(\$1.07)	\$0.00	(\$1.07)
															004	TAX	(\$8.04)	\$0.00	(\$8.04)
															002	TAX	(\$103.09)	\$0.00	(\$103.09)
															Refund			\$167.49	
LEAKE, JASON LANDRY	LEAKE, JASON LANDRY		1238 BROMLEY DR		MATTHEWS, NC 28104	Proration	0079720612	FHE057	AUTHORIZED	760271456	Refund Generated due to proration on Bill #0079720612-2023-2023-0000-00	Vehicle Sold	#####	11/26/2024	001	TAX	(\$14.11)	(\$0.71)	(\$14.82)
															800	TAX	(\$3.89)	(\$0.19)	(\$4.08)
															026	TAX	(\$3.24)	(\$0.16)	(\$3.40)
															003	TAX	(\$1.51)	(\$0.07)	(\$1.58)
															005	TAX	(\$0.34)	(\$0.02)	(\$0.36)
															004	TAX	(\$2.53)	(\$0.13)	(\$2.66)
															002	TAX	(\$32.35)	(\$1.62)	(\$33.97)
Refund			\$60.87		\$60.87														
LEE, BOK KOO	LEE, BOK KOO		1021 SPANISH MOSS RD		INDIAN TRAIL, NC 28079	Proration	0027875505	DBF4127	AUTHORIZED	758569350	Refund Generated due to proration on Bill #0027875505-2023-2023-0000-00	Vehicle Totalled	#####	11/18/2024	001	TAX	(\$0.93)	\$0.00	(\$0.93)
															600	TAX	(\$1.06)	\$0.00	(\$1.06)
															010	TAX	(\$0.30)	\$0.00	(\$0.30)
															003	TAX	(\$0.10)	\$0.00	(\$0.10)
															005	TAX	(\$0.02)	\$0.00	(\$0.02)
															004	TAX	(\$0.17)	\$0.00	(\$0.17)
															002	TAX	(\$2.14)	\$0.00	(\$2.14)
Refund			\$4.72		\$4.72														
LEMMONDS, GARY NALL	LEMMONDS, GARY NALL	LEMMONDS, BARBARA HILL	4317 WESTERN UNION SCHOOL RD		WAXHAW, NC 28173	Proration	0068995510	KM9662	AUTHORIZED	648817236	Refund Generated due to proration on Bill #0068995510-2024-2024-0000-00	Vehicle Sold	11/5/2024	11/6/2024	001	TAX	(\$76.02)	\$0.00	(\$76.02)
															015	TAX	(\$25.71)	\$0.00	(\$25.71)
															003	TAX	(\$8.15)	\$0.00	(\$8.15)
															005	TAX	(\$1.82)	\$0.00	(\$1.82)
															004	TAX	(\$13.60)	\$0.00	(\$13.60)
															002	TAX	(\$174.30)	\$0.00	(\$174.30)
															Refund			\$299.60	
LOCASCIO, DEBRA MELANIE	LOCASCIO, DEBRA MELANIE		1709 MEADOW CREST CT		MATTHEWS, NC 28104	Proration	0072541833	TLA8368	AUTHORIZED	758136470	Refund Generated due to proration on Bill #0072541833-2023-2023-0000-00	Vehicle Sold	#####	11/14/2024	001	TAX	(\$13.95)	\$0.00	(\$13.95)
															970	TAX	(\$1.10)	\$0.00	(\$1.10)
															026	TAX	(\$3.21)	\$0.00	(\$3.21)
															003	TAX	(\$1.50)	\$0.00	(\$1.50)
															005	TAX	(\$0.33)	\$0.00	(\$0.33)
															004	TAX	(\$2.50)	\$0.00	(\$2.50)
															002	TAX	(\$31.99)	\$0.00	(\$31.99)
Refund			\$54.58		\$54.58														
LUNDQUIST, AARON ALLAN	LUNDQUIST, AARON ALLAN		1225 PERIWINKLE DR		WAXHAW, NC 28173	Proration	0047527519	HBA2718	AUTHORIZED	868881696	Refund Generated due to proration on Bill #0047527519-2023-2023-0000-00	Vehicle Sold	#####	11/26/2024	001	TAX	(\$2.31)	(\$0.11)	(\$2.42)
															500	TAX	(\$5.46)	(\$0.32)	(\$5.78)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$0.50)	(\$0.04)	(\$0.53)
															003	TAX	(\$0.25)	(\$0.02)	(\$0.27)
															005	TAX	(\$0.05)	(\$0.01)	(\$0.06)
															004	TAX	(\$0.41)	(\$0.03)	(\$0.44)
002	TAX	(\$5.31)	(\$0.30)	(\$5.61)															
Refund			\$15.21		\$15.21														



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
MARTIN, BARBARA LAWRENCE	MARTIN, BARBARA LAWRENCE		6926 CREFT CIR		INDIAN TRAIL, NC 28079	Proration	0016619578	JDV2091	AUTHORIZED	760610893	Refund Generated due to proration on Bill #0016619578-2023-2023-0000-00	Vehicle Totalled	#####	12/2/2024	001	TAX	(\$3.99)	(\$0.27)	(\$4.26)
															900	TAX	(\$4.95)	(\$0.32)	(\$5.27)
															023	TAX	(\$1.08)	(\$0.07)	(\$1.15)
															003	TAX	(\$0.43)	(\$0.03)	(\$0.46)
															005	TAX	(\$0.10)	\$0.00	(\$0.10)
															004	TAX	(\$0.71)	(\$0.04)	(\$0.75)
															002	TAX	(\$9.15)	(\$0.60)	(\$9.75)
Refund																	\$21.74		
MARTINEZ AUDELIO, MARENA	MARTINEZ AUDELIO, MARENA		PO BOX 7349		CONCORD, NC 28027	Adjustment < \$100	0078999427	TKH5765	PENDING	865090688	Refund Generated due to adjustment on Bill #0078999427-2023-2023-0000	Situs error	11/5/2024	001	TAX	\$0.00	\$0.00	\$0.00	
														200	TAX	(\$9.45)	(\$0.54)	(\$9.99)	
														200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
														024	TAX	\$1.30	\$0.07	\$1.37	
														003	TAX	\$0.00	\$0.00	\$0.00	
														005	TAX	\$0.00	\$0.00	\$0.00	
														004	TAX	\$0.00	\$0.00	\$0.00	
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$38.62		
MARTINEZ AUDELIO, MARENA	MARTINEZ AUDELIO, MARENA		2624 OLD PAGELAND MONROE	RD	MONROE, NC 28112	Adjustment < \$100	0080422208	VBA6930	PENDING	865090696	Refund Generated due to adjustment on Bill #0080422208-2024-2024-0000	Situs error	11/5/2024	001	TAX	\$0.00	\$0.00	\$0.00	
														200	TAX	(\$30.00)	\$0.00	(\$30.00)	
														200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
														024	TAX	\$4.90	\$0.00	\$4.90	
														003	TAX	\$0.00	\$0.00	\$0.00	
														005	TAX	\$0.00	\$0.00	\$0.00	
														004	TAX	\$0.00	\$0.00	\$0.00	
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$55.90		
MASSEY, MERV TITTON	MASSEY, MERV TITTON		4616 WATERBELL LN		WAXHAW, NC 28173	Proration	0023599432	DAE3173	AUTHORIZED	866363560	Refund Generated due to proration on Bill #0023599432-2024-2024-0000-00	Vehicle Sold	#####	11/13/2024	001	TAX	(\$29.42)	\$0.00	(\$29.42)
															500	TAX	(\$69.40)	\$0.00	(\$69.40)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$9.43)	\$0.00	(\$9.43)
															003	TAX	(\$3.15)	\$0.00	(\$3.15)
															005	TAX	(\$0.71)	\$0.00	(\$0.71)
															004	TAX	(\$5.26)	\$0.00	(\$5.26)
002	TAX	(\$67.46)	\$0.00	(\$67.46)															
Refund																	\$184.83		
MCDANIEL, NATHAN LANE	MCDANIEL, NATHAN LANE		4307 CAHNNAS WAY		WAXHAW, NC 28173	Proration	0073276502	K802629	AUTHORIZED	651662706	Refund Generated due to proration on Bill #0073276502-2024-2024-0000-00	Vehicle Sold	#####	11/26/2024	001	TAX	(\$260.13)	\$0.00	(\$260.13)
															028	TAX	(\$83.36)	\$0.00	(\$83.36)
															003	TAX	(\$27.89)	\$0.00	(\$27.89)
															005	TAX	(\$6.21)	\$0.00	(\$6.21)
															004	TAX	(\$46.54)	\$0.00	(\$46.54)
															002	TAX	(\$596.45)	\$0.00	(\$596.45)
															Refund				
MEGARGEE, BARNARD GILBERT	MEGARGEE, BARNARD GILBERT		4507 HAMPSTEAD HEATH DR		WAXHAW, NC 28173	Proration	0054724581	KD4841	AUTHORIZED	865802504	Refund Generated due to proration on Bill #0054724581-2023-2023-0000-00	Vehicle Totalled	11/8/2024	11/12/2024	001	TAX	(\$5.13)	\$0.00	(\$5.13)
															500	TAX	(\$12.10)	\$0.00	(\$12.10)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$1.32)	\$0.00	(\$1.32)
															003	TAX	(\$0.55)	\$0.00	(\$0.55)
															005	TAX	(\$0.12)	\$0.00	(\$0.12)
															004	TAX	(\$0.92)	\$0.00	(\$0.92)
002	TAX	(\$11.77)	\$0.00	(\$11.77)															
Refund																	\$31.91		
MINER, EDWARD DENISON	MINER, EDWARD DENISON		1000 DEFOOR CT		INDIAN TRAIL, NC 28079	Proration	0069624915	R2GT12	AUTHORIZED	756150346	Refund Generated due to proration on Bill #0069624915-2023-2023-0000-00	Vehicle Sold	11/1/2024	11/4/2024	001	TAX	(\$6.66)	\$0.00	(\$6.66)
															600	TAX	(\$7.55)	\$0.00	(\$7.55)
															026	TAX	(\$1.53)	\$0.00	(\$1.53)
															003	TAX	(\$0.71)	\$0.00	(\$0.71)
															005	TAX	(\$0.16)	\$0.00	(\$0.16)
															004	TAX	(\$1.19)	\$0.00	(\$1.19)
															002	TAX	(\$15.28)	\$0.00	(\$15.28)
Refund																	\$33.08		
MOMSEN, KATHLEN ANN	MOMSEN, KATHLEN ANN		8808 BRIARSTONE LN		WAXHAW, NC 28173	Proration	0036603091	EJX3971	AUTHORIZED	648817668	Refund Generated due to proration on Bill #0036603091-2023-2023-0000-00	Vehicle Sold	11/5/2024	11/6/2024	001	TAX	(\$1.33)	\$0.00	(\$1.33)
															026	TAX	(\$0.31)	\$0.00	(\$0.31)
															003	TAX	(\$0.14)	\$0.00	(\$0.14)
															005	TAX	(\$0.03)	\$0.00	(\$0.03)
															004	TAX	(\$0.24)	\$0.00	(\$0.24)
															002	TAX	(\$3.05)	\$0.00	(\$3.05)
															Refund				
MONTESCLAROS, YURI RODULFO	MONTESCLAROS, YURI RODULFO		1511 ARIES LN		WAXHAW, NC 28173	Proration	0068197081	XPN3381	AUTHORIZED	651046728	Refund Generated due to proration on Bill #0068197081-2023-2023-0000-00	Vehicle Sold	#####	11/25/2024	001	TAX	(\$1.01)	\$0.00	(\$1.01)
															015	TAX	(\$0.29)	\$0.00	(\$0.29)
															003	TAX	(\$0.11)	\$0.00	(\$0.11)
															005	TAX	(\$0.02)	\$0.00	(\$0.02)
															004	TAX	(\$0.18)	\$0.00	(\$0.18)
															002	TAX	(\$2.32)	\$0.00	(\$2.32)
															Refund				



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
MONTGOMERY, DESTINY JEWEL	MONTGOMERY, DESTINY JEWEL		2508 FOXWORTH DR		MONROE, NC 28110	Proration	0050245242	PHX2431	AUTHORIZED	756920150	Refund Generated due to proration on Bill #0050245242-2024-2024-0000-00	Vehicle Sold	11/4/2024	11/5/2024	001	TAX	(\$3.54)	\$0.00	(\$3.54)
															200	TAX	(\$10.90)	\$0.00	(\$10.90)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															003	TAX	(\$0.38)	\$0.00	(\$0.38)
															005	TAX	(\$0.08)	\$0.00	(\$0.08)
															004	TAX	(\$0.63)	\$0.00	(\$0.63)
															002	TAX	(\$8.12)	\$0.00	(\$8.12)
Refund																		\$53.65	
MORAN, GERALD OVIDIO	MORAN, GERALD OVIDIO		7301 TWELVE MILE CREEK RD		LANCASTER, SC 29720	Proration	0030814065	DHY2198	AUTHORIZED	869269080	Refund Generated due to proration on Bill #0030814065-2023-2023-0000-00	Reg. Out of state	#####	12/2/2024	001	TAX	(\$6.40)	\$0.00	(\$6.40)
															500	TAX	(\$15.09)	\$0.00	(\$15.09)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$1.64)	\$0.00	(\$1.64)
															003	TAX	(\$0.69)	\$0.00	(\$0.69)
															005	TAX	(\$0.15)	\$0.00	(\$0.15)
															004	TAX	(\$1.15)	\$0.00	(\$1.15)
002	TAX	(\$14.67)	\$0.00	(\$14.67)															
Refund																		\$39.79	
MOSBO, JUSTIN KELL	MOSBO, JUSTIN KELL	MOSBO, JUAN LIU	3117 WEEPING WILLOW DR		WEDDINGTON, NC 28104	Adjustment < \$100	0080142649	JJB4226	PENDING	973226583	Refund Generated due to adjustment on Bill #0080142649-2024-2024-0000	Situs error	11/5/2024	001	TAX	\$0.00	\$0.00	\$0.00	
														200	TAX	(\$52.16)	\$0.00	(\$52.16)	
														200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
														000	TAX	\$2.60	\$0.00	\$2.60	
														026	TAX	\$4.13	\$0.00	\$4.13	
														003	TAX	\$0.00	\$0.00	\$0.00	
														005	TAX	\$0.00	\$0.00	\$0.00	
004	TAX	\$0.00	\$0.00	\$0.00															
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																		\$75.43	
MOYER, TAYLOR CHARLES	MOYER, TAYLOR CHARLES		6306 JERUSALEM CHURCH RD		MARSHVILLE, NC 28103	Adjustment < \$100	0081127518	TMJ4544	PENDING	868882992	Refund Generated due to adjustment on Bill #0081127518-2023-2023-0000	Situs error	#####	001	TAX	\$0.00	\$0.00	\$0.00	
														200	TAX	(\$4.02)	(\$0.47)	(\$4.49)	
														200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
														017	TAX	\$0.31	\$0.04	\$0.35	
														003	TAX	\$0.00	\$0.00	\$0.00	
														005	TAX	\$0.00	\$0.00	\$0.00	
														004	TAX	\$0.00	\$0.00	\$0.00	
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																		\$34.14	
MULLEN, JESSICA RAY	MULLEN, JESSICA RAY		1311 FOUNTAIN LN		INDIAN TRAIL, NC 28079	Adjustment < \$100	0079395438	TBF7462	PENDING	759338671	Refund Generated due to adjustment on Bill #0079395438-2024-2024-0000-00	Damage	#####	001	TAX	(\$12.49)	\$0.00	(\$12.49)	
														970	TAX	(\$1.26)	\$0.00	(\$1.26)	
														026	TAX	(\$3.04)	\$0.00	(\$3.04)	
														003	TAX	(\$1.34)	\$0.00	(\$1.34)	
														005	TAX	(\$0.29)	\$0.00	(\$0.29)	
														004	TAX	(\$2.24)	\$0.00	(\$2.24)	
														002	TAX	(\$28.63)	\$0.00	(\$28.63)	
Refund																		\$49.29	
NICHOLS, WALTER EDWARD	NICHOLS, WALTER EDWARD		6007 CAMROSE CROSSING LN		MATTHEWS, NC 28104	Proration	0080681348	VEP3824	AUTHORIZED	759110107	Refund Generated due to proration on Bill #0080681348-2024-2024-0000-00	Vehicle Totalled	#####	11/20/2024	001	TAX	(\$29.78)	\$0.00	(\$29.78)
															600	TAX	(\$33.76)	\$0.00	(\$33.76)
															020	TAX	(\$9.76)	\$0.00	(\$9.76)
															003	TAX	(\$3.19)	\$0.00	(\$3.19)
															005	TAX	(\$0.71)	\$0.00	(\$0.71)
															004	TAX	(\$5.33)	\$0.00	(\$5.33)
															002	TAX	(\$68.29)	\$0.00	(\$68.29)
Refund																		\$150.82	
NIKITIN, MYKYTA	NIKITIN, MYKYTA		313 E PARK RD APT 332	APT R	INDIAN TRAIL, NC 28079	Adjustment < \$100	0080616810	VDE7099	PENDING	973226799	Refund Generated due to adjustment on Bill #0080616810-2024-2024-0000	Situs error	11/5/2024	001	TAX	\$0.00	\$0.00	\$0.00	
														600	TAX	\$43.07	\$0.00	\$43.07	
														200	TAX	(\$116.98)	\$0.00	(\$116.98)	
														200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
														020	TAX	\$12.45	\$0.00	\$12.45	
														003	TAX	\$0.00	\$0.00	\$0.00	
														005	TAX	\$0.00	\$0.00	\$0.00	
004	TAX	\$0.00	\$0.00	\$0.00															
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																		\$91.46	
NUNN, KYLE JAMES	NUNN, KYLE JAMES		4920 GREENLOCH CT		MONROE, NC 28110	Proration	0066193876	TJA9299	AUTHORIZED	649351884	Refund Generated due to proration on Bill #0066193876-2023-2023-0000-00	Vehicle Sold	11/8/2024	11/12/2024	001	TAX	(\$4.37)	\$0.00	(\$4.37)
															019	TAX	(\$1.39)	\$0.00	(\$1.39)
															003	TAX	(\$0.46)	\$0.00	(\$0.46)
															005	TAX	(\$0.10)	\$0.00	(\$0.10)
															004	TAX	(\$0.78)	\$0.00	(\$0.78)
002	TAX	(\$10.02)	\$0.00	(\$10.02)															
Refund																		\$17.12	



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
OLLAR, CHARLOTTE MEREDIATH	OLLAR, CHARLOTTE MEREDIATH		2069 YELLOWSTONE DR	INDIAN LAND, SC 29707	Proration	0072196771	KFV5407	AUTHORIZED	648127002	Refund Generated due to proration on Bill #0072196771-2023-2023-0000-00	Reg. Out of state	11/1/2024	11/4/2024	001	TAX	(\$35.84)	\$0.00	(\$35.84)	
														023	TAX	(\$9.69)	\$0.00	(\$9.69)	
														003	TAX	(\$3.84)	\$0.00	(\$3.84)	
														005	TAX	(\$0.85)	\$0.00	(\$0.85)	
														004	TAX	(\$6.41)	\$0.00	(\$6.41)	
														002	TAX	(\$82.17)	\$0.00	(\$82.17)	
Refund																	\$138.00		
OLLAR, CHARLOTTE MEREDIATH	OLLAR, CHARLOTTE MEREDIATH	OLLAR, WILLIAM SCOTT	2069 YELLOWSTONE DR	INDIAN LAND, SC 29707	Proration	0052262515	JEC2230	AUTHORIZED	648127008	Refund Generated due to proration on Bill #0052262515-2023-2023-0000-00	Vehicle Sold	11/1/2024	11/4/2024	001	TAX	(\$7.68)	\$0.00	(\$7.68)	
														023	TAX	(\$2.00)	\$0.00	(\$2.00)	
														003	TAX	(\$0.82)	\$0.00	(\$0.82)	
														005	TAX	(\$0.18)	\$0.00	(\$0.18)	
														004	TAX	(\$1.38)	\$0.00	(\$1.38)	
														002	TAX	(\$17.62)	\$0.00	(\$17.62)	
Refund																	\$29.76		
PATEL, BHAVINA ATUL	PATEL, BHAVINA ATUL		1316 SELMA DR	WESLEY CHAPEL, NC 28104	Proration	0062542094	FFW1188	AUTHORIZED	758381925	Refund Generated due to proration on Bill #0062542094-2024-2024-0000-00	Vehicle Sold	#####	11/15/2024	001	TAX	(\$34.23)	\$0.00	(\$34.23)	
														970	TAX	(\$3.46)	\$0.00	(\$3.46)	
														026	TAX	(\$8.35)	\$0.00	(\$8.35)	
														003	TAX	(\$3.67)	\$0.00	(\$3.67)	
														005	TAX	(\$0.82)	\$0.00	(\$0.82)	
														004	TAX	(\$6.12)	\$0.00	(\$6.12)	
002	TAX	(\$78.48)	\$0.00	(\$78.48)															
Refund																	\$135.13		
PATEL, CHIRAG SURYAKANT	PATEL, CHIRAG SURYAKANT		4254 POPLIN GROVE DR	INDIAN TRAIL, NC 28079	Proration	0068663697	HCT5789	AUTHORIZED	756148561	Refund Generated due to proration on Bill #0068663697-2023-2023-0000-00	Vehicle Sold	11/1/2024	11/4/2024	001	TAX	(\$30.51)	\$0.00	(\$30.51)	
														200	TAX	(\$93.92)	\$0.00	(\$93.92)	
														200	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
														003	TAX	(\$3.27)	\$0.00	(\$3.27)	
														005	TAX	(\$0.72)	\$0.00	(\$0.72)	
														004	TAX	(\$5.46)	\$0.00	(\$5.46)	
002	TAX	(\$69.94)	\$0.00	(\$69.94)															
Refund																	\$203.82		
PATEL, KIRAN	PATEL, KIRAN		1245 LADERA DR	WAXHAN, NC 28173	Proration	0070528662	TMH3459	AUTHORIZED	651693084	Refund Generated due to proration on Bill #0070528662-2023-2023-0000-00	Vehicle Sold	#####	11/27/2024	001	TAX	(\$17.69)	\$0.00	(\$17.69)	
														026	TAX	(\$4.06)	\$0.00	(\$4.06)	
														003	TAX	(\$1.90)	\$0.00	(\$1.90)	
														005	TAX	(\$0.42)	\$0.00	(\$0.42)	
														004	TAX	(\$3.16)	\$0.00	(\$3.16)	
														002	TAX	(\$40.57)	\$0.00	(\$40.57)	
Refund																	\$67.00		
PATTERSON, EZEKIEL SABASTIAN BLANE	PATTERSON, EZEKIEL SABASTIAN BLANE		6000 OLD HEARTWOOD W	APT 6312	MATTHEWS, NC 28104	Adjustment < \$100	0080620813	9B8252	PENDING	973225539	Refund Generated due to adjustment on Bill #0080620813-2024-2024-0000-00	Situs error	11/5/2024	001	TAX	\$0.00	\$0.00	\$0.00	
														200	TAX	(\$63.07)	\$0.00	(\$63.07)	
														200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)	
														700	TAX	\$27.11	\$0.00	\$27.11	
														020	TAX	\$6.72	\$0.00	\$6.72	
														003	TAX	\$0.00	\$0.00	\$0.00	
005	TAX	\$0.00	\$0.00	\$0.00															
004	TAX	\$0.00	\$0.00	\$0.00															
002	TAX	\$0.00	\$0.00	\$0.00															
Refund																	\$59.24		
PHILLIPS, JASON SMITH	PHILLIPS, JASON SMITH		9806 RIVA RIDGE LN	WAXHAN, NC 28173	Proration	0080406713	LDP3513	AUTHORIZED	651046752	Refund Generated due to proration on Bill #0080406713-2024-2024-0000-00	Vehicle Sold	#####	11/25/2024	001	TAX	(\$447.08)	\$0.00	(\$447.08)	
														026	TAX	(\$109.03)	\$0.00	(\$109.03)	
														003	TAX	(\$47.94)	\$0.00	(\$47.94)	
														005	TAX	(\$10.68)	\$0.00	(\$10.68)	
														004	TAX	(\$79.99)	\$0.00	(\$79.99)	
														002	TAX	(\$1,025.12)	\$0.00	(\$1,025.12)	
Refund																	\$1719.84		
PICCA, MATTHEW CHRISTOPHER	PICCA, MATTHEW CHRISTOPHER		5408 UNIONVILLE RD	UNIONVILLE, NC 28110	Proration	0078459023	KJ26713	AUTHORIZED	760273234	Refund Generated due to proration on Bill #0078459023-2023-2023-0000-00	Vehicle Sold	#####	11/26/2024	001	TAX	(\$39.60)	\$0.00	(\$39.60)	
														980	TAX	(\$4.85)	\$0.00	(\$4.85)	
														021	TAX	(\$14.90)	\$0.00	(\$14.90)	
														003	TAX	(\$4.25)	\$0.00	(\$4.25)	
														005	TAX	(\$0.95)	\$0.00	(\$0.95)	
														004	TAX	(\$7.08)	\$0.00	(\$7.08)	
002	TAX	(\$90.81)	\$0.00	(\$90.81)															
Refund																	\$162.44		
PIGG, JOHN DARREL	PIGG, JOHN DARREL		5924 POTTER RD	MATTHEWS, NC 28104	Proration	0070760768	TJAB169	AUTHORIZED	756149086	Refund Generated due to proration on Bill #0070760768-2023-2023-0000-00	Vehicle Sold	11/1/2024	11/4/2024	001	TAX	(\$0.76)	\$0.00	(\$0.76)	
														600	TAX	(\$0.86)	\$0.00	(\$0.86)	
														020	TAX	(\$0.22)	\$0.00	(\$0.22)	
														003	TAX	(\$0.00)	\$0.00	(\$0.00)	
														005	TAX	(\$0.02)	\$0.00	(\$0.02)	
														004	TAX	(\$0.13)	\$0.00	(\$0.13)	
002	TAX	(\$1.74)	\$0.00	(\$1.74)															
Refund																	\$3.81		



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
PIGG, JOHN DARREL	PIGG, JOHN DARREL		5924 POTTER RD		MATTHEWS, NC 28184	Proration	0070942502	TF06195	AUTHORIZED	756149093	Refund Generated due to proration on Bill #0070942502-2023-2023-0000-00	Vehicle Sold	11/1/2024	11/4/2024	001	TAX	(\$2.16)	\$0.00	(\$2.16)
															600	TAX	(\$2.45)	\$0.00	(\$2.45)
															020	TAX	(\$0.63)	\$0.00	(\$0.63)
															003	TAX	(\$0.23)	\$0.00	(\$0.23)
															005	TAX	(\$0.05)	\$0.00	(\$0.05)
															004	TAX	(\$0.39)	\$0.00	(\$0.39)
															002	TAX	(\$4.96)	\$0.00	(\$4.96)
Refund																	\$10.87		
POLYI, AMY LYNN	POLYI, AMY LYNN		600 LYNN ST		WAXHAW, NC 28173	Proration	0079874333	TLJ6788	AUTHORIZED	867552136	Refund Generated due to proration on Bill #0079874333-2023-2023-0000-00	Vehicle Sold	#####	11/20/2024	001	TAX	(\$24.15)	(\$1.21)	(\$25.36)
															500	TAX	(\$56.96)	(\$2.85)	(\$59.81)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$6.20)	(\$0.31)	(\$6.51)
															003	TAX	(\$2.59)	(\$0.13)	(\$2.72)
															005	TAX	(\$0.58)	(\$0.03)	(\$0.61)
															004	TAX	(\$4.32)	(\$0.21)	(\$4.53)
002	TAX	(\$55.36)	(\$2.77)	(\$58.13)															
Refund																	\$157.67		
PRIORY, RICHARD BALDWIN JR	PRIORY, RICHARD BALDWIN JR		916 MOOSE TRL		STALLINGS, NC 28104	Proration	0074054197	5114P	AUTHORIZED	756918554	Refund Generated due to proration on Bill #0074054197-2023-2023-0000-00	Vehicle Totalled	11/4/2024	11/5/2024	001	TAX	(\$5.77)	\$0.00	(\$5.77)
															700	TAX	(\$6.58)	\$0.00	(\$6.58)
															023	TAX	(\$1.56)	\$0.00	(\$1.56)
															003	TAX	(\$0.62)	\$0.00	(\$0.62)
															005	TAX	(\$0.14)	\$0.00	(\$0.14)
															004	TAX	(\$1.03)	\$0.00	(\$1.03)
															002	TAX	(\$13.23)	\$0.00	(\$13.23)
Refund																	\$28.93		
PUENTE, MARISSA TERESA	PUENTE, MARISSA TERESA		1263 MILL RACE LN		MATTHEWS, NC 28184	Proration	0073927846	TKV6246	AUTHORIZED	759753400	Refund Generated due to proration on Bill #0073927846-2023-2023-0000-00	Reg . Out of state	#####	11/25/2024	001	TAX	(\$28.37)	\$0.00	(\$28.37)
															700	TAX	(\$32.33)	\$0.00	(\$32.33)
															023	TAX	(\$7.67)	\$0.00	(\$7.67)
															003	TAX	(\$3.04)	\$0.00	(\$3.04)
															005	TAX	(\$0.68)	\$0.00	(\$0.68)
															004	TAX	(\$5.07)	\$0.00	(\$5.07)
															002	TAX	(\$65.03)	\$0.00	(\$65.03)
Refund																	\$142.19		
RAHMAN, SANSAN ABDEL ABDEL	RAHMAN, SANSAN ABDEL ABDEL		3100 SHADOWY RETREAT DR		MATTHEWS, NC 28184	Proration	0076043819	KMP2854	AUTHORIZED	759339581	Refund Generated due to proration on Bill #0076043819-2023-2023-0000-00	Vehicle Sold	#####	11/21/2024	001	TAX	(\$1.41)	\$0.00	(\$1.41)
															700	TAX	(\$1.61)	\$0.00	(\$1.61)
															023	TAX	(\$0.38)	\$0.00	(\$0.38)
															003	TAX	(\$0.15)	\$0.00	(\$0.15)
															005	TAX	(\$0.03)	\$0.00	(\$0.03)
															004	TAX	(\$0.25)	\$0.00	(\$0.25)
															002	TAX	(\$3.24)	\$0.00	(\$3.24)
Refund																	\$7.07		
REICHEL, MARK PAUL	REICHEL, MARK PAUL		2317 BARRINGTON RIDGE DR		WAXHAW, NC 28173	Proration	0070350564	5A1434	AUTHORIZED	868892400	Refund Generated due to proration on Bill #0070350564-2023-2023-0000-00	Vehicle Sold	#####	11/26/2024	001	TAX	(\$26.44)	\$0.00	(\$26.44)
															500	TAX	(\$62.38)	\$0.00	(\$62.38)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															026	TAX	(\$6.07)	\$0.00	(\$6.07)
															003	TAX	(\$2.83)	\$0.00	(\$2.83)
															005	TAX	(\$0.63)	\$0.00	(\$0.63)
															004	TAX	(\$4.73)	\$0.00	(\$4.73)
002	TAX	(\$60.63)	\$0.00	(\$60.63)															
Refund																	\$163.71		
RICHMOND, STEVEN BOYD	RICHMOND, STEVEN BOYD	RICHMOND, DONNA JEAN	405 BOUGAINVILLEA CT		MONROE, NC 28110	Proration	0041085332	FDJ6019	AUTHORIZED	650664672	Refund Generated due to proration on Bill #0041085332-2023-2023-0000-00	Vehicle Sold	#####	11/20/2024	001	TAX	(\$19.85)	\$0.00	(\$19.85)
															019	TAX	(\$6.35)	\$0.00	(\$6.35)
															003	TAX	(\$2.13)	\$0.00	(\$2.13)
															005	TAX	(\$0.47)	\$0.00	(\$0.47)
															004	TAX	(\$3.55)	\$0.00	(\$3.55)
															002	TAX	(\$45.51)	\$0.00	(\$45.51)
															Refund				
ROBERTS, MICHELLE RAE	ROBERTS, MICHELLE RAE		2029 COUNTY HIGHWAY 83A E		FREEPORT, FL 32439	Proration	0066346112	JFE7060	AUTHORIZED	759554474	Refund Generated due to proration on Bill #0066346112-2023-2023-0000-00	Reg . Out of state	#####	11/25/2024	001	TAX	(\$32.85)	\$0.00	(\$32.85)
															700	TAX	(\$37.44)	\$0.00	(\$37.44)
															023	TAX	(\$8.88)	\$0.00	(\$8.88)
															003	TAX	(\$3.52)	\$0.00	(\$3.52)
															005	TAX	(\$0.79)	\$0.00	(\$0.79)
															004	TAX	(\$5.88)	\$0.00	(\$5.88)
															002	TAX	(\$75.33)	\$0.00	(\$75.33)
Refund																	\$164.69		
ROLLINGS, STEVEN POWERS	ROLLINGS, STEVEN POWERS		839 YUCATAN DR		WAXHAW, NC 28173	Proration	0077244691	KFA7795	AUTHORIZED	649351938	Refund Generated due to proration on Bill #0077244691-2023-2023-0000-00	Vehicle Sold	11/8/2024	11/12/2024	001	TAX	(\$29.16)	\$0.00	(\$29.16)
															015	TAX	(\$8.29)	\$0.00	(\$8.29)
															003	TAX	(\$3.13)	\$0.00	(\$3.13)
															005	TAX	(\$0.70)	\$0.00	(\$0.70)
															004	TAX	(\$5.22)	\$0.00	(\$5.22)
															002	TAX	(\$66.86)	\$0.00	(\$66.86)
															Refund				



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change															
ROMERO CASTRO, HANNAH JOCABETH	ROMERO CASTRO, HANNAH JOCABETH		314 OLIVE BRANCH EXT		MARSHVILLE, NC 28103	Adjustment < \$100	0080827334	LDP4333	PENDING	973226556	Refund Generated due to adjustment on Bill #0080827334-2024-2024-0000	Situs error	11/5/2024		001	TAX	\$0.00	\$0.00	\$0.00															
															400	TAX	\$25.85	\$0.00	\$25.85															
															200	TAX	(\$23.62)	\$0.00	(\$23.62)															
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)															
															018	TAX	\$3.46	\$0.00	\$3.46															
															003	TAX	\$0.00	\$0.00	\$0.00															
															005	TAX	\$0.00	\$0.00	\$0.00															
															004	TAX	\$0.00	\$0.00	\$0.00															
															002	TAX	\$0.00	\$0.00	\$0.00															
															Refund																	\$24.31		
SALGADO CONSTRUCTION GROUP	SALGADO CONSTRUCTION GROUP		6810 B ALEXANDER FARM RD		MONROE, NC 28110	Adjustment < \$100	0080797036	LEF4578	PENDING	865052640	Refund Generated due to adjustment on Bill #0080797036-2024-2024-0000	Situs error	11/4/2024		001	TAX	\$0.00	\$0.00	\$0.00															
															200	TAX	(\$26.73)	\$0.00	(\$26.73)															
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)															
															017	TAX	\$3.13	\$0.00	\$3.13															
															003	TAX	\$0.00	\$0.00	\$0.00															
															005	TAX	\$0.00	\$0.00	\$0.00															
															004	TAX	\$0.00	\$0.00	\$0.00															
															002	TAX	\$0.00	\$0.00	\$0.00															
															Refund																	\$53.60		
															SDR CUSTOM POOLS SPA & PATIO LLC	SDR CUSTOM POOLS SPA & PATIO LLC		1823 THERRELL FARMS RD		WAXHAW, NC 28173	Proration	0065927612	RDW2484	AUTHORIZED	865379984	Refund Generated due to proration on Bill #0065927612-2023-2023-0000-00	Vehicle Sold	11/6/2024	11/7/2024	001	TAX	(\$33.92)	(\$1.68)	(\$35.60)
101	TAX	(\$12.47)	(\$0.63)	(\$13.10)																														
101	VEHICLE FEE	\$0.00	\$0.00	\$0.00																														
026	TAX	(\$7.80)	(\$0.39)	(\$8.19)																														
003	TAX	(\$3.64)	(\$0.19)	(\$3.83)																														
005	TAX	(\$0.81)	(\$0.04)	(\$0.85)																														
004	TAX	(\$6.07)	(\$0.31)	(\$6.38)																														
002	TAX	(\$77.77)	(\$3.89)	(\$81.66)																														
Refund																														\$149.61				
SHIVELY, MELISSA FAYE	SHIVELY, MELISSA FAYE	SHIVELY, DAVID BENJAMIN	9000 BITBERG LN		WAXHAW, NC 28173	Proration	0058516846	JAH2687	AUTHORIZED	869270408	Refund Generated due to proration on Bill #0058516846-2023-2023-0000-00	Vehicle Sold	#####	12/2/2024																001	TAX	(\$40.71)	\$0.00	(\$40.71)
															500	TAX	(\$96.04)	\$0.00	(\$96.04)															
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00															
															028	TAX	(\$10.45)	\$0.00	(\$10.45)															
															003	TAX	(\$4.36)	\$0.00	(\$4.36)															
															005	TAX	(\$0.97)	\$0.00	(\$0.97)															
															004	TAX	(\$7.28)	\$0.00	(\$7.28)															
															002	TAX	(\$93.34)	\$0.00	(\$93.34)															
															Refund																	\$253.15		
															SILVERSTEIN, JACOB LEE	SILVERSTEIN, JACOB LEE	SILVERSTEIN, ALEXANDRA CATHERINE	191 ROSEWOOD LOOP SW		COMMERCIAL POINT, OH 43116	Proration	0079474102	RJE2315	AUTHORIZED	757206282	Refund Generated due to proration on Bill #0079474102-2024-2024-0000-00	Vehicle Sold	11/6/2024	11/7/2024	001	TAX	(\$20.16)	\$0.00	(\$20.16)
600	TAX	(\$22.85)	\$0.00	(\$22.85)																														
023	TAX	(\$6.33)	\$0.00	(\$6.33)																														
003	TAX	(\$2.16)	\$0.00	(\$2.16)																														
005	TAX	(\$0.48)	\$0.00	(\$0.48)																														
004	TAX	(\$3.61)	\$0.00	(\$3.61)																														
002	TAX	(\$46.23)	\$0.00	(\$46.23)																														
Refund																														\$101.82				
SOKOLYUK, ALEKSANDR DMITRIYEVICH	SOKOLYUK, ALEKSANDR DMITRIYEVICH		4307 ROCKY RIVER RD N		INDIAN TRAIL, NC 28079	Proration	0071191230	THX1164	AUTHORIZED	649033578	Refund Generated due to proration on Bill #0071191230-2023-2023-0000-00	Vehicle Sold	11/6/2024	11/7/2024																001	TAX	(\$28.58)	\$0.00	(\$28.58)
																														023	TAX	(\$7.73)	\$0.00	(\$7.73)
															003	TAX	(\$3.07)	\$0.00	(\$3.07)															
															005	TAX	(\$0.68)	\$0.00	(\$0.68)															
															004	TAX	(\$5.11)	\$0.00	(\$5.11)															
															002	TAX	(\$65.53)	\$0.00	(\$65.53)															
															Refund																	\$110.70		
															SOLOMAR, VITALIY	SOLOMAR, VITALIY		5802 AUTUMN TRACE LN		INDIAN TRAIL, NC 28079	Proration	0080061337	VEF1042	AUTHORIZED	759108406	Refund Generated due to proration on Bill #0080061337-2024-2024-0000-00	Vehicle Sold	#####	11/20/2024	001	TAX	(\$12.92)	\$0.00	(\$12.92)
																														600	TAX	(\$14.65)	\$0.00	(\$14.65)
																														019	TAX	(\$5.05)	\$0.00	(\$5.05)
003	TAX	(\$1.38)	\$0.00	(\$1.38)																														
005	TAX	(\$0.31)	\$0.00	(\$0.31)																														
004	TAX	(\$2.31)	\$0.00	(\$2.31)																														
002	TAX	(\$29.62)	\$0.00	(\$29.62)																														
Refund																														\$66.24				
SOTELO, DIANA MELISSA	SOTELO, DIANA MELISSA		3706 EXBURY GARDENS DR		WAXHAW, NC 28173	Proration	0056015228	AAX6495	AUTHORIZED	866720456	Refund Generated due to proration on Bill #0056015228-2023-2023-0000-00	Vehicle Sold	#####	11/15/2024																001	TAX	(\$2.23)	\$0.00	(\$2.23)
																														500	TAX	(\$5.25)	\$0.00	(\$5.25)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00															
															028	TAX	(\$0.57)	\$0.00	(\$0.57)															
															003	TAX	(\$0.24)	\$0.00	(\$0.24)															
															005	TAX	(\$0.05)	\$0.00	(\$0.05)															
															004	TAX	(\$0.40)	\$0.00	(\$0.40)															
															002	TAX	(\$5.11)	\$0.00	(\$5.11)															
															Refund																	\$13.85		



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change															
STEVENSON, JACOB DANIEL	STEVENSON, JACOB DANIEL		18203 ROCKWOOD RD		CHARLOTTE, NC 28215	Adjustment < \$100	0080630629	KCV2658	PENDING	973226817	Refund Generated due to adjustment on Bill #0080630629-2024-2024-0000	Situs error	11/5/2024		001	TAX	\$0.00	\$0.00	\$0.00															
															200	TAX	(\$32.81)	\$0.00	(\$32.81)															
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)															
															700	TAX	\$14.10	\$0.00	\$14.10															
															023	TAX	\$3.34	\$0.00	\$3.34															
															003	TAX	\$0.00	\$0.00	\$0.00															
															005	TAX	\$0.00	\$0.00	\$0.00															
															004	TAX	\$0.00	\$0.00	\$0.00															
															002	TAX	\$0.00	\$0.00	\$0.00															
															Refund																	\$45.37		
STRICKLAND, MICHAEL VANN	STRICKLAND, MICHAEL VANN		1729 RIDGE HAVEN DR		MAXHAH, NC 28173	Proration	0072749895	KB39950	AUTHORIZED	868062288	Refund Generated due to proration on Bill #0072749895-2023-0000-00	Vehicle Sold	*****	11/25/2024	001	TAX	(\$78.66)	\$0.00	(\$78.66)															
															500	TAX	(\$185.55)	\$0.00	(\$185.55)															
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00															
															028	TAX	(\$20.19)	\$0.00	(\$20.19)															
															003	TAX	(\$0.43)	\$0.00	(\$0.43)															
															005	TAX	(\$1.88)	\$0.00	(\$1.88)															
															004	TAX	(\$14.07)	\$0.00	(\$14.07)															
															002	TAX	(\$180.34)	\$0.00	(\$180.34)															
															Refund																	\$489.12		
															THAO, FRANK	THAO, FRANK		.422 TIRZAH CHURCH RD		MAXHAH, NC 28173	Adjustment < \$100	0080612511	FJA7926	PENDING	865090480	Refund Generated due to adjustment on Bill #0080612511-2024-2024-0000	Situs error	11/5/2024		001	TAX	\$0.00	\$0.00	\$0.00
200	TAX	(\$20.10)	\$0.00	(\$20.10)																														
200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)																														
025	TAX	\$2.01	\$0.00	\$2.01																														
003	TAX	\$0.00	\$0.00	\$0.00																														
005	TAX	\$0.00	\$0.00	\$0.00																														
004	TAX	\$0.00	\$0.00	\$0.00																														
002	TAX	\$0.00	\$0.00	\$0.00																														
Refund																														\$48.09				
THE ESTATE OF EVELYN BELK	BELK, EVELYN UNDERWOOD		1100 MALLARD CROSSING DR		MONROE, NC 28110	Proration	0063536660	FKP3148	AUTHORIZED	757405621	Refund Generated due to proration on Bill #0063536660-2023-0000-00	Vehicle Sold	11/7/2024	11/8/2024																001	TAX	(\$7.68)	\$0.00	(\$7.68)
															200	TAX	(\$23.64)	\$0.00	(\$23.64)															
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00															
															003	TAX	(\$0.82)	\$0.00	(\$0.82)															
															005	TAX	(\$0.18)	\$0.00	(\$0.18)															
															004	TAX	(\$1.37)	\$0.00	(\$1.37)															
															002	TAX	(\$17.60)	\$0.00	(\$17.60)															
															Refund																	\$51.29		
															TOURTELLOT, ELIZABETH LYNN	TOURTELLOT, ELIZABETH LYNN		5006 PADDLE WHEEL LN		INDIAN TRAIL, NC 28079	Proration	0074940558	PFN5027	AUTHORIZED	758380714	Refund Generated due to proration on Bill #0074940558-2023-0000-00	Vehicle Sold	*****	11/15/2024	001	TAX	(\$0.55)	(\$0.03)	(\$0.58)
																														600	TAX	(\$0.63)	(\$0.03)	(\$0.66)
023	TAX	(\$0.15)	(\$0.01)	(\$0.16)																														
003	TAX	(\$0.06)	\$0.00	(\$0.06)																														
005	TAX	(\$0.01)	\$0.00	(\$0.01)																														
004	TAX	(\$0.10)	\$0.00	(\$0.10)																														
002	TAX	(\$1.27)	(\$0.07)	(\$1.34)																														
Refund																														\$2.91				
TRAVERZO, DERRICK LOUIS	TRAVERZO, DERRICK LOUIS	TRAVERZO, ASHLEE LAUREN	W707 CREEK MANOR DR		MAXHAH, NC 28173	Adjustment < \$100	0080484845	2174UA	PENDING	865090752	Refund Generated due to adjustment on Bill #0080484845-2024-2024-0000	Situs error	11/5/2024																	001	TAX	\$0.00	\$0.00	\$0.00
																														200	TAX	(\$17.29)	\$0.00	(\$17.29)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)															
															026	TAX	\$1.37	\$0.00	\$1.37															
															003	TAX	\$0.00	\$0.00	\$0.00															
															005	TAX	\$0.00	\$0.00	\$0.00															
															004	TAX	\$0.00	\$0.00	\$0.00															
															002	TAX	\$0.00	\$0.00	\$0.00															
															Refund																	\$45.92		
															VAN ARSDALE, PATRICIA ELLEN	VAN ARSDALE, PATRICIA ELLEN		108 BIG DIPPER CT		WINGATE, NC 28174	Proration	0058292170	EKL4217	AUTHORIZED	866936456	Refund Generated due to proration on Bill #0058292170-2023-0000-00	Vehicle Sold	*****	11/18/2024	001	TAX	(\$10.63)	\$0.00	(\$10.63)
300	TAX	(\$22.15)	\$0.00	(\$22.15)																														
300	VEHICLE FEE	\$0.00	\$0.00	\$0.00																														
022	TAX	(\$4.36)	\$0.00	(\$4.36)																														
003	TAX	(\$1.14)	\$0.00	(\$1.14)																														
005	TAX	(\$0.26)	\$0.00	(\$0.26)																														
004	TAX	(\$1.90)	\$0.00	(\$1.90)																														
002	TAX	(\$24.38)	\$0.00	(\$24.38)																														
Refund																														\$64.82				
VAZQUEZ-GONZALEZ, ALLAN KEVIN	VAZQUEZ-GONZALEZ, ALLAN KEVIN		5315 REID RD		INDIAN TRAIL, NC 28079	Adjustment < \$100	0080585732	LEF1707	PENDING	649772436	Refund Generated due to adjustment on Bill #0080585732-2024-2024-0000-00	SLVG or RBLT TTL	*****																	001	TAX	(\$11.41)	\$0.00	(\$11.41)
															023	TAX	(\$3.58)	\$0.00	(\$3.58)															
															003	TAX	(\$1.22)	\$0.00	(\$1.22)															
															005	TAX	(\$0.27)	\$0.00	(\$0.27)															
															004	TAX	(\$2.04)	\$0.00	(\$2.04)															
															002	TAX	(\$26.16)	\$0.00	(\$26.16)															
															Refund																	\$44.68		
															WATKINS, ANTOINE MAURICE	WATKINS, ANTOINE MAURICE	WATKINS, HEATHER PARMENTER	521 PEMBROKE LN		MAXHAH, NC 28173	Proration	0074933374	KEB3259	AUTHORIZED	651693282	Refund Generated due to proration on Bill #0074933374-2023-0000-00	Vehicle Sold	*****	11/27/2024	001	TAX	(\$18.41)	\$0.00	(\$18.41)
																														026	TAX	(\$4.23)	\$0.00	(\$4.23)
																														003	TAX	(\$1.97)	\$0.00	(\$1.97)
005	TAX	(\$0.44)	\$0.00	(\$0.44)																														
004	TAX	(\$3.29)	\$0.00	(\$3.29)																														
002	TAX	(\$42.21)	\$0.00	(\$42.21)																														
Refund																														\$70.55				



North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
WEATHERS, BEVERLY MONTEITH	WEATHERS, BEVERLY MONTEITH	DANIELS, GLENN THOMAS	8008 LAKE PROVIDENCE DR		MATTHEWS, NC 28184	Proration	0080449339	VEF1537	AUTHORIZED	760272842	Refund Generated due to proration on Bill #0080449339-2024-2024-0000-00	Vehicle Sold	#####	11/26/2024	001	TAX	(\$17.43)	\$0.00	(\$17.43)
															000	TAX	(\$2.67)	\$0.00	(\$2.67)
															026	TAX	(\$4.25)	\$0.00	(\$4.25)
															003	TAX	(\$1.87)	\$0.00	(\$1.87)
															005	TAX	(\$0.41)	\$0.00	(\$0.41)
															004	TAX	(\$3.12)	\$0.00	(\$3.12)
															002	TAX	(\$39.96)	\$0.00	(\$39.96)
Refund																			
\$69.71																			
WILSON, JUDITH PATTERSON	WILSON, JUDITH PATTERSON		1296 AUSTIN RD		PAGELAND, SC 29728	Proration	0072498087	EDV3944	AUTHORIZED	650040120	Refund Generated due to proration on Bill #0072498087-2023-2023-0000-00	Vehicle Totalled	#####	11/15/2024	001	TAX	(\$10.61)	\$0.00	(\$10.61)
															014	TAX	(\$2.26)	\$0.00	(\$2.26)
															003	TAX	(\$1.14)	\$0.00	(\$1.14)
															005	TAX	(\$0.25)	\$0.00	(\$0.25)
															004	TAX	(\$1.90)	\$0.00	(\$1.90)
															002	TAX	(\$24.33)	\$0.00	(\$24.33)
Refund																			
\$40.49																			
WOHLGAMUTH, SUZETTE KOLEEN	WOHLGAMUTH, SUZETTE KOLEEN		2001 OAKSTONE DR		MONROE, NC 28110	Proration	0070130111	TKE1625	AUTHORIZED	756149079	Refund Generated due to proration on Bill #0070130111-2023-2023-0000-00	Vehicle Totalled	11/1/2024	11/4/2024	001	TAX	(\$0.53)	\$0.00	(\$0.53)
															600	TAX	(\$0.60)	\$0.00	(\$0.60)
															019	TAX	(\$0.17)	\$0.00	(\$0.17)
															003	TAX	(\$0.06)	\$0.00	(\$0.06)
															005	TAX	(\$0.01)	\$0.00	(\$0.01)
															004	TAX	(\$0.09)	\$0.00	(\$0.09)
															002	TAX	(\$1.21)	\$0.00	(\$1.21)
Refund																			
\$2.67																			
WOOLEVER, GEORGE MATTHEW JR	WOOLEVER, GEORGE MATTHEW JR		2001 BROOK VALLEY RUN		MONROE, NC 28110	Proration	0078910223	RHW4299	AUTHORIZED	758067800	Refund Generated due to proration on Bill #0078910223-2023-2023-0000-00	Insurance Lapse	#####	11/13/2024	001	TAX	(\$19.63)	\$0.00	(\$19.63)
															600	TAX	(\$22.25)	\$0.00	(\$22.25)
															019	TAX	(\$6.28)	\$0.00	(\$6.28)
															003	TAX	(\$2.11)	\$0.00	(\$2.11)
															005	TAX	(\$0.47)	\$0.00	(\$0.47)
															004	TAX	(\$3.51)	\$0.00	(\$3.51)
002	TAX	(\$45.01)	\$0.00	(\$45.01)															
Refund																			
\$99.26																			
Refund Total																			
\$33299.90																			



Union County, NC

Staff Report

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

File #: 25-012

Agenda Date: 1/21/2025

TITLE:

Tax Collector's Departmental Report for November 2024

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

None.

To: Board of County Commissioners
Brian Matthews, County Manager
Lynn West, Clerk to the Board

From: Vann Harrell
Tax Administrator

Date: December 10, 2024

Re: Departmental Monthly Report

The Tax Collector's monthly/year to date collections report for the month ending November 27, 2024 is attached for your information and review.

Should you desire additional information, I will provide that at your request.

Attachment

VH/JM

**NOVEMBER 2024
PERCENTAGE FOR REGULAR TAX**

NOVEMBER 27, 2024 REGULAR TAX	2024	2023	2022	2021
BEGINNING CHARGE	237,312,599.67	226,118,089.83	216,944,945.63	208,154,547.88
TAX CHARGE				
PUBLIC UTILITIES CHARGE				
DISCOVERIES	6,123.54			
NON DISCOVERIES	34,436.79	33,641.65	33,417.64	32,609.11
RELEASES	(4,937.37)	(1,026.26)	(941.98)	(901.95)
TOTAL CHARGE	237,348,222.63	226,150,705.22	216,977,421.29	208,186,255.04
BEGINNING COLLECTIONS	42,072,696.36	225,948,248.80	216,842,433.90	208,076,044.25
COLLECTIONS	107,114,223.39	34,246.65	27,419.01	26,209.73
TOTAL COLLECTIONS	149,186,919.75	225,982,495.45	216,869,852.91	208,102,253.98
BALANCE OUTSTANDING	88,161,302.88	168,209.77	107,568.38	84,001.06
PERCENTAGE OF REGULAR	62.86%	99.93%	99.95%	99.96%
OVERALL CHARGED	237,348,222.63	226,150,705.22	216,977,421.29	208,186,255.04
OVERALL COLLECTED	149,186,919.75	225,982,495.45	216,869,852.91	208,102,253.98
OVERALL PERCENTAGE	62.86%	99.93%	99.95%	99.96%

**NOVEMBER 2024
PERCENTAGE FOR REGULAR TAX**

NOVEMBER 27, 2024 REGULAR TAX	2020	2019	2018	2017
BEGINNING CHARGE	192,183,785.35	186,540,740.56	180,717,811.44	186,663,147.61
TAX CHARGE				
PUBLIC UTILITIES CHARGE				
DISCOVERIES				
NON DISCOVERIES				
RELEASES	(715.89)	(593.26)		
TOTAL CHARGE	192,183,069.46	186,540,147.30	180,717,811.44	186,663,147.61
BEGINNING COLLECTIONS	192,102,454.41	186,437,593.55	180,656,274.30	186,613,429.22
COLLECTIONS	1,174.09	536.18	270.77	241.10
TOTAL COLLECTIONS	192,103,628.50	186,438,129.73	180,656,545.07	186,613,670.32
BALANCE OUTSTANDING	79,440.96	102,017.57	61,266.37	49,477.29
PERCENTAGE OF REGULAR	99.96%	99.95%	99.97%	99.97%
OVERALL CHARGED	192,183,069.46	186,540,147.30	180,717,811.44	186,663,147.61
OVERALL COLLECTED	192,103,628.50	186,438,129.73	180,656,545.07	186,613,670.32
OVERALL PERCENTAGE	99.96%	99.95%	99.97%	99.97%

**NOVEMBER 2024
PERCENTAGE FOR REGULAR TAX**

NOVEMBER 27, 2024 REGULAR TAX	2016	2015
BEGINNING CHARGE	176,859,604.37	174,193,635.20
TAX CHARGE		
PUBLIC UTILITIES CHARGE		
DISCOVERIES		
NON DISCOVERIES		
RELEASES		
TOTAL CHARGE	176,859,604.37	174,193,635.20
BEGINNING COLLECTIONS	176,818,171.23	174,171,604.54
COLLECTIONS	180.46	174.37
TOTAL COLLECTIONS	176,818,351.69	174,171,778.91
BALANCE OUTSTANDING	41,252.68	21,856.29
PERCENTAGE OF REGULAR	99.98%	99.99%
OVERALL CHARGED	176,859,604.37	174,193,635.20
OVERALL COLLECTED	176,818,351.69	174,171,778.91
OVERALL PERCENTAGE	99.98%	99.99%



Union County, NC

Staff Report

Union County Government
Center
500 North Main Street
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File #: 25-016

Agenda Date: 1/21/2025

TITLE:

FY2025 Budget Transfers Reporting - 2nd Quarter

INFORMATION CONTACT:

Blake Hart, Assistant Director, Budget & Grants Management, 704-283-3674

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Per section XIV, XV, XVI, XVII, XVIII, XIX, and XX of the FY 2025 Adopted Operating and Capital Budget Ordinance, management reports the following County Manager Budget Amendments (CMBA) made by the County Manager for the second quarter of fiscal year 2025.

CMBA 10: To recognize, receive, and appropriate state allocation of StRAP (Streamflow Rehabilitation Assistance Program) funds to conduct vegetative debris removal activities.

CMBA 11: To appropriate revenue and fund balance/retained earnings for outstanding contracts, purchase orders and available project/program balances for expenditures, projects and programs.

CMBA 12: Correction to Transfer balance on the expense side of the ARPA funds using the Fund balance appropriation.

CMBA 13: Transfer funds from the FY 2025 Longevity budget to the individual departments in the General Fund, Water and Sewer and Solid Waste.

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

Union County Government
Center
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File #: 25-028

Agenda Date: 1/21/2025

TITLE:

Monthly Update - Wastewater Treatment Capacity

INFORMATION CONTACT:

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

ACTION REQUESTED:

Receive status update on wastewater treatment capacity for the Twelve Mile Creek, Crooked Creek, Olde Sycamore, Tallwood, and Grassy Branch facilities.

PRIOR BOARD ACTIONS:

None

BACKGROUND:

Union County Water is closely monitoring the wastewater treatment capacities at our Water Reclamation Facilities. Permitting Capacity is evaluated using the Actual Plant Flows plus the Permitted/Obligated Flows (unconnected). Union County Water was asked to provide regular updates. Plant flow information through December 2024 is summarized in the attached table.

Twelve Mile Creek

- Percent of Actual Flows = 72.0%
- Percent of Actual + Permitted Flows = 91.9%
- Actual Flows (MGD) = 5.403
- Actual + Permitted Obligated Flows (MGD) = 6.891

Crooked Creek

- Percent of Actual Flows = 59.6%
- Percent of Actual + Permitted Flows = 89.9%
- Actual Flows (MGD) = 1.133
- Actual + Permitted Obligated Flows (MGD) = 1.709

Olde Sycamore

- Percent of Actual Flows = 30.0%
- Percent of Actual + Permitted Flows = 30.0%
- Actual Flows (MGD) = 0.045
- Actual + Permitted Obligated Flows (MGD) = 0.045

Tallwood

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

Grassy Branch

- Percent of Actual Flows = 92.0%
- Percent of Actual + Permitted Flows = 94.0%
- Actual Flows (MGD) = 0.046
- Actual + Permitted Obligated Flows (MGD) = 0.047

In addition to the wastewater treatment capacities, flow volumes associated with development projects that are in the planning and review process within the Twelve Mile Creek and Crooked Creek WRF service areas are provided for information as well. Development flow volumes through December 2024 are summarized in the attached tables.

FINANCIAL IMPACT:

None

Water Reclamation Facility Flows

WRF	Permitted Capacity (MGD)	Actual Average Daily Flow ¹ (MGD)	Percent of Actual Flow Used	Actual + Permitted Obligated Flows (MGD)	Percent of Permitted Flow Used	Actual Rainfall (in)
Twelve Mile Creek	7.5	5.403	72.0%	6.891	91.9%	1.4
Crooked Creek	1.9	1.133	59.6%	1.709	89.9%	3.2
Olde Sycamore	0.15	0.045	30.0%	0.045	30.0%	3.5
Tallwood	0.05	0.022	44.0%	0.022	44.0%	3.3
Grassy Branch	0.05	0.046	92.0%	0.047	94.0%	3.4

¹Based on a 12-month rolling average.

Development Flows

12-Mile Creek WRF		
Backlog Type	Number of Projects	Requested Flow (MGD)
Approved – Permit Submittal Pending	2	0.133
Engineering Plan Review	14	0.511
Sketch Plan Review	16	0.736
Totals	32	1.380

Crooked Creek WRF		
Backlog Type	Number of Projects	Requested Flow (MGD)
Approved – Permit Submittal Pending	2	0.051
Engineering Plan Review	7	0.175
Sketch Plan Review	4	0.106
Totals	13	0.332



Union County, NC

Staff Report

Union County Government
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File #: 25-008

Agenda Date: 1/21/2025

TITLE:

FY 2024 Annual Comprehensive Financial Report

INFORMATION CONTACT:

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

ACTION REQUESTED:

Accept the FY 2024 Annual Comprehensive Financial Report

PRIOR BOARD ACTIONS:

None

BACKGROUND:

Cherry Bekaert LLP, a firm of licensed certified public accountants, has issued an unmodified opinion on Union County's financial statements for the year ended June 30, 2024. The independent auditor's report is located at the front of the financial section of this report. The audit was also designed to meet the requirements of the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards and the State Single Audit Implementation Act. These reports are submitted separately, and include the schedules of financial assistance, findings and questioned costs, and the independent auditor's report on internal control and compliance. The following is excerpted from the Report of Independent Auditor. "In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, the business-type activities, each major fund, and the aggregate remaining fund information of the County, as of June 30, 2024, and the respective changes in financial position and, where applicable, cash flows thereof, and the budgetary comparison for the General Fund for the year then ended in accordance with accounting principles generally accepted in the United States of America".

The FY 2024 Annual Comprehensive Financial Report (ACFR) will be available on the County's website on the Finance Department's webpage at the following link:

<https://www.unioncountync.gov/government/departments-f-p/finance/annual-comprehensive-financial-reports>

FINANCIAL IMPACT:

None



Union County, NC

Staff Report

Union County Government
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File #: 25-027

Agenda Date: 1/21/2025

TITLE:

Economic Development Presentation

INFORMATION CONTACT:

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

ACTION REQUESTED:

Receive information.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County started its own Economic Development Department in early December 2024. This is to provide the board with an update on both the current status of economic development and goals as we look into the future.

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

Union County Government
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File #: 25-029

Agenda Date: 1/21/2025

TITLE:

Senior Nutrition Update

INFORMATION CONTACT:

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

ACTION REQUESTED:

Receive information.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

There were several questions that were asked at the previous meeting about Union County's senior nutrition program. This is to provide an update and additional detail on the senior nutrition program and options the board may have.

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

Union County Government
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File #: 25-033

Agenda Date: 1/21/2025

TITLE:

Request for Proposals - Legislative Lobbying Services

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve Request for Proposals for lobbying services.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County currently contracts with Navigator, LLC; this contract has been in place since August 1, 2020. The board has expressed interest in advertising a Request for Proposals for lobbying services. This is an opportunity for the board to discuss and determine how they want to move forward with lobbying services.

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

Union County Government
Center
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File #: 25-034

Agenda Date: 1/21/2025

TITLE:

Resolution - Resolution in Support of Local Legislation for Union County Concerning Local Government Zoning Control and Session Law 2024-57 (S.B. 382)

INFORMATION CONTACT:

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

ACTION REQUESTED:

- 1) Adopt the Resolution in Support of Legal Legislation for Union County Concerning Local Government Zoning Control and Session Law 2024-57 (S.B. 382); and
- 2) Direct the County Manager, or his designee, to distribute the Resolution to all municipalities located in Union County.

PRIOR BOARD ACTIONS:

December 16, 2024, Regular Meeting, Agenda Item # 24-884 - Board adopted a Resolution in Support of Repeal or Amendment of Section 3K.1 of Session Law 2024-57

BACKGROUND:

On December 11, 2024, the General Assembly adopted Session Law 2024-57 (S.B. 382). A section of this bill, Section 3K.1 is entitled "No Local Government Initiated Down-Zoning without Consent of Affected Property Owner." A major revision in this section removes a local government's ability to initiate a "down-zoning amendment" to its own zoning regulations or zoning map unless certain highly burdensome requirements are met. This functionally prevents a local government's ability to address population growth and limit population density in certain areas via down-zoning amendments.

The State-imposed zoning amendment removes the traditional authority and ability of local governments to amend their own regulations at the local level, thereby limiting the authority of local voters to express their policy preferences through local elected officials. Due to the adoption of this legislation, the Board adopted a Resolution in Support of Repeal or Amendment of Section 3K.1 of Session Law 2024-57 on December 16, 2024.

However, due to Union County's particular position as one of the ten most populous counties in North Carolina, while also being one of the fastest growing counties in the State, it has unique issues concerning population growth, density, and related pressures as it adjoins one of the mostly highly urbanized areas of the United States. This necessitates the ability to respond to those issues through local zoning regulation. Thus, this resolution requests that the Union County Legislative Delegation bring forth to the General Assembly a bill, support such bill, and continuously advocate for the passage of such bill, which repeals the State imposed limitation on local government initiated down-zoning amendments set forth in Section 3K.2 of Session Law 2024-57.

FINANCIAL IMPACT:

None.

**RESOLUTION IN SUPPORT OF LOCAL LEGISLATION FOR UNION COUNTY
CONCERNING LOCAL GOVERNMENT ZONING CONTROL AND SESSION LAW
2024-57 (S.B. 382)**

WHEREAS, on December 11, 2024, S.L. 2024-57 (S.B. 382), a bill entitled “An Act to Make Modifications to and Provide Additional Appropriations for Disaster Recovery; to Make Technical, Clarifying, and Other Modifications to the Current Operations Appropriations Act of 2023; and to Make Various Changes to the Law,” became law (“the Act”); and

WHEREAS, the Act includes a Section 3K.1 entitled “No Local Government Initiated Down-Zoning without Consent of Affected Property Owner” (the “Zoning Amendment”); and

WHEREAS, the Zoning Amendment, among other revisions, amends N.C.G.S. § 160D-601 by removing a local government’s ability to initiate a “down-zoning amendment” to its own zoning regulations or zoning map without written consent of all property owners whose property is the subject of the down-zoning, functionally preventing or making substantially impossible the previously held local freedom to deal with certain zoning matters in all the ways that seem best to a local community; and

WHEREAS, the traditional zoning regulations of local governments are subject to amendment or repeal at the will of the local government which created them, with local residents able to petition their local leaders for a variety of actions and local elected leaders subject to the will of local voters; and

WHEREAS, the Zoning Amendment removes this traditional authority and ability of local governments in zoning regulation and, thereby, limits the authority of local voters to express their policy preferences by and through local elected officials; and

WHEREAS, the Zoning Amendment constrains local government control of zoning regulations, resulting in a more rigid regulatory framework that is the same throughout the State, regardless of how rural or urban those local areas may be, with more limited ability for a local government to meet the needs of its residents in a manner which promotes the health, safety, and welfare of local constituents; and

WHEREAS, Union County in particular needs to be responsive in zoning matters in its jurisdiction, as Union County is one of the ten most populous counties in North Carolina, while also being one of the fastest growing counties in the State, which results in unique issues concerning population growth, density, and related pressures which necessitate the ability to respond to those issues through zoning regulations; and

WHEREAS, the Union County Board of Commissioners (the “Board”), composed of local government officials elected by the people at the local level in Union County, are those officials who are in the best position to consider and respond to the full range of highly localized concerns related to zoning maps and zoning regulations and their effect on Union County’s jurisdiction, in particular due to Union County’s position as a higher-population, higher-growth county adjoining a highly urbanized area; and

WHEREAS, while Union County constituents have been deprived of some these regulatory powers and the ability to address unique concerns in favor of a one-size-fits all approach imposed at the State level through the Zoning Amendment, local control may be

restored through an exemption from the constraints of the Zoning Amendment through a local bill applying to Union County and exempt Union County from the strictures of the State imposed Zoning Amendment; and

WHEREAS, in particular, restoration of Union County’s ability to initiate “down-zoning” regulations itself would return control of zoning within Union County’s jurisdiction to the County’s constituents through their elected representatives on the Board; and

WHEREAS, such local control would help to ensure that the Board is able to protect the health, safety, and welfare of the people of Union County through any necessary zoning regulations which are in the best interests of the people of Union County; and

NOW, THEREFORE, BE IT RESOLVED that the Union County Board of Commissioners requests that the Union County Legislative Delegation sponsor a bill in the General Assembly, support such bill, and continuously advocate for the passage of such bill, which repeals the limitation on local government initiated down-zoning amendments set forth in Section 3K.1 of the Act as it particularly pertains to Union County; and

BE IT FURTHER RESOLVED that copies of this resolution be sent to the Union County Legislative Delegation to the North Carolina General Assembly and to all municipalities located in Union County.

Adopted this 21st day of January, 2025.

Melissa Merrell, Chair
Union County Board of Commissioners