

**CITY OF MONROE - GENERAL SERVICES COMMITTEE  
CITY HALL CONFERENCE ROOM  
300 W. CROWELL STREET, MONROE, NC 28112  
Thursday, January 8, 2026 - 4:00 PM**

**AGENDA**  
**[www.monroenc.org](http://www.monroenc.org)**

1. General Services Committee Meeting Minutes of December 4, 2025
2. Update to Customer Service Policy to Address Penny Shortage
3. Acceptance of SelectSites Readiness Program Grant Funds
4. Acceptance of ElectriCities Downtown Revitalization Grant Funds
5. Request by Geetha Vallabhaneni and Srinivas Kollipara to Relocate Crook Cemetery Located on Secrest Shortcut Road
6. Request for Sidewalk Deviation at 1815 N Rocky River Road
7. Budget Amendment and Budget Ordinance for Budgetary Compliance for Fiscal Year 2026
8. Special Event Permit for Dr. Martin Luther King Jr. Parade
9. Approval of Insurance Renewals for Workers Compensation and Airport Operations Liability

Other Items



**CITY OF MONROE  
GENERAL SERVICES COMMITTEE MEETING**

City Hall Conference Room  
300 W. Crowell Street  
Monroe, NC 28112  
December 4, 2025 - 4:15 PM

**MINUTES**

Present: Committee Member Julie Thompson (Chairwoman), Committee Member Gary Anderson, Committee Member Surluta Anthony

Absent: None

Staff: Mark Watson, City Manager; Lisa Hollowell, Assistant City Manager; Terry Sholar, Senior Staff Attorney; Richard Long Jr., City Attorney; William Hunt, Assistant City Attorney; Lisa Strickland, Director of Finance; Ashley Ivey, Assistance Finance Director; Lisa Kerner, Grant Administrator; Pete Hovanec, Director of Park, Recreation and Tourism; Ryan Jones, Director of Property Management; Catherine Mullis, Permit Center Supervisor; Teresa Campo, Director of Economic Development; Lisa Stiwinter, Director of Planning and Development.

Visitor(s): Patrick Mucaearn, Ripples Fiber; Melinda Plue, Committee on Disabilities.

The General Services Committee met in the City Hall Conference Room at 4:15 p.m. on December 4, 2025. A quorum was present. Chairwoman Julie Thompson presided.

**Item 1. General Services Committee Meeting Minutes November 6, 2025.**

The minutes from the November 6, 2025 General Services Committee meeting were presented for the Committee's approval.

Committee Member Anthony moved to approve the minutes of the General Services Committee Meeting of November 6, 2025.

Committee Member Anderson seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

**Item 2. Resolution Authorization to Dispose of 2005 Tandem Dump Truck and 2008 Flusher Truck.**

Lisa Strickland, Director of Finance, presented that Staff requests approval for disposal of surplus property (1) 2005 Tandem Dump truck 2216 C05042 VIN# 1FVHC5CV55HU67801 and 2008 GMC Flusher truck 2362-C01696 VIN# 1GDP7C1B08F404268 located at Operations Center.

Staff is requesting City Council approval to authorize staff to dispose of the following piece of equipment as defined by G.S. 160-270A. Pursuant to G.S. 160-270A and Title III, Chapter 34 of the City of Monroe Code of Ordinances staff is required to seek board approval when the fair market value of surplus personal property is believed to exceed \$30,000. It is staff's belief that the potential proceeds of this surplus equipment may be in excess of \$30,000, therefore, staff requests adoption of a Resolution giving authority to dispose of the following items:

2008 GMC Flusher truck 2362-C01696 VIN# 1GDP7C1B08F404268

Items will be sold on GovDeals.com, an auction site for government equipment. Proceeds from the sale of these assets will be returned to the respective operating funds.

Staff requests a favorable recommendation from General Services Committee to City Council for the approval of the disposal of surplus property (1) 2005 Tandem Dump truck 2216 C05042 VIN#1FVHC5CV55HU67801 and 2008 GMC Flusher truck 2362-C01696 VIN# 1GDP7C1B08F404268 by approving Resolution R-2025-64

Committee Member Anderson made a motion to approve the recommendation and move to Consent Agenda.

Committee Member Anthony seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

**Item 3. City of Monroe Housing Program**

Teresa Campo, Director of Economic Development, presented an overview of the various programs and partnerships to address affordable housing and ensure residents have access to stable housing. The following programs were discussed:

Urgent Repair Program. In partnership with Habitat for Humanity, this program helps low-to moderate income homeowners with critical repairs like roofs or HVAC. Eligibility is based on HUD income limits.

Mortgage Assistance and Foreclosure Prevention. Through a partnership with a local community development corporation, the city offers assistance to help residents avoid foreclosure and stay in their homes. This is also income based.

Homebuyer Education and Fair Housing Programs. The city provides education programs for first-time homebuyers and fair housing services. These are available to both city employees and residents.

Down-Payment Assistance. An ongoing partnership helps with down payment assistance for low to moderate income families, including some special preference for veterans or first responders.

Additional Partnerships. The city also collaborates with outside agencies to provide rental and utility assistance, domestic violence shelter services, and support for disabled populations.

This is for information only.

**Item 4. Utility Fee Grant Program Update**

Lisa Strickland, Finance Director, presented that information is also being provided to the Committee to fulfill reporting requirements of the Utility Fee Waiver Program and Resolution R-2015-41. The goal of the Utility Fee Waiver program is to encourage homes to be built for people who are certified to be income eligible at the time of purchase and to ensure that the program is meeting City expectations.

The following chart represents a history of previous utility assistance provided and the current status of ownership.

Date	Property Address	Recipient	Original Owner still reside in the property?	Utility Fee Waiver Amount
7-8-15	2319 Hargette Rd	Habitat for Humanity	Yes	\$7,404
7-8-15	2321 Hargette Rd	Habitat for Humanity	Yes	\$7,598

9-6-15	2916 Secrest Short Cut Rd	Fredia Barbee	Yes	\$3,339
10-27-15	438 East Village Dr Lot 17	Monroe UC CDC	Yes	\$5,046
3-15-16	2502 Saddlebred Way	St. Jude's	n/a	\$5,046
3-14-17	2310 Goldmine Rd	Habitat for Humanity	Yes	\$7,140
3-14-17	3407 Ridgewood Ave	Habitat for Humanity	Yes	\$7,140
12-19-17	433 East Village Dr	Monroe UC CDC	Yes	\$5,036
12-19-17	427 East Village Dr	Monroe UC CDC	Yes	\$5,036
12-19-17	503 East Village Dr	Monroe UC CDC	Yes	\$5,036
4-12-18	1915 Bowie St	Habitat for Humanity	Yes	\$7,140
4-12-18	1923 Bowie St	Habitat for Humanity	Yes	\$7,140
8-30-18	506 East Village Dr	Monroe UC CDC	Yes	\$5,184
9-12-18	500 Sunnybrook Dr	Kelly & Betty Leak	Yes	\$3,720
10-5-18	406 S West St	Habitat for Humanity	Yes	\$7,349
3-6-2019	350 East Village Dr	Monroe UC CDC	Yes	\$5,184
3-6-19	344 East Village Dr	Monroe UC CDC	Yes	\$5,184
5-9-19	1450 Citrus Dr	Habitat for Humanity	Yes	\$5,184
5-9-19	1107 Sikes St	Habitat for Humanity	Yes	\$7,349
7-21-20	217 E East Ave	Dorothy Gaither	Yes	\$3,828
8-14-23	5006 Myers Rd	Tony Cureton	Yes	\$4,291
6-11-24	1702 Carson St	Luybov Chernenchenko	Yes	\$4,291

The Utility Fee Grant Program currently has a remaining balance of \$17,590.00.

Staff presents this as an informational update only.

**Item 5. Easement to Ripple Fiber Located at the Monroe Science Center**

Terry Sholar, Senior Staff Attorney, presented that Ripple Fiber has requested the City of Monroe grant it an easement for the location of a fiber optic cabinet at the Monroe Science Center adjacent to Windsor Street.

Ripple Fiber is in the process of installing fiber optic cable throughout the City of Monroe including areas along Windsor Street in downtown. Part of the installation requires locating a fiber optic cabinet along Windsor Street on the Monroe Science Center property. The City of Monroe is asked to grant a 10 foot by 10-foot easement on the Science Center property on which to locate the cabinet.

The General Services Committee is requested to consider granting the easement to Ripple Fiber on the Monroe Science Center property adjacent to Windsor Street and make a recommendation it be added to the City Council December agenda for consideration.

Committee Member Anthony made a motion to approve the request and add it to the Agenda for consideration.

Committee Member Anderson seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

**Item 6. Approval of Airport Leases**

Lisa Hollowell, Assistant City Manager, presented The City of Monroe released an RFP in 2024 for a long-term land lease on Airport pad L1 and selected Charlotte-Monroe Hangar 1, LLC to develop a new aircraft storage hangar under a thirty-year lease with renewal options. Council approval is now requested to ratify the lease agreement signed by the City Manager and Tenant.

The City of Monroe renegotiated contracts for hangar storage and aviation operations with Aerowood Aviation, LLC. The City has executed these contracts and the Council is being requested to ratify these agreements.

The City of Monroe issued a Request for Proposals in 2024 for a long-term land lease on a building pad at the Airport known as L1, Staff recommended and Council approved Charlotte-Monroe Hangar 1, LLC as the approved contractor for a land lease. This agreement establishes a thirty-year lease with two 5-year renewals for the construction of a hangar to be used for aircraft storage. The Tenant for this project was presented to and approved by City Council in 2024, and Council is now being asked to ratify the City Manager's execution of the land lease for a hangar to be built on pad "L1." The City has renegotiated hangar leases with an existing business operating on Airport property, Aerowood Aviation, LLC, for hangars #5, #6, #9 aircraft storage, all associated office space and the main terminal office space. These agreements extend beyond one year. The Council is being asked to ratify these signed agreements.

It is recommended that the General Services Committee advise to Council ratification of the contracts with Charlotte-Monroe Hangar 1, LLC, for the land lease and with Aerowood Aviation, LLC for the multi-year leases for hangar storage. Additionally, Staff recommends that Council delegate the authority to the City Manager to negotiate, enter into, and sign all future, authorized Airport leases without the need for further City Council consideration.

Committee Member Anderson made a motion to approve the request and forward it to the City Consent Agenda for approval.

Committee Member Anthony seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

**Item 7. Adopt Series Resolution and Budget Amendment to Issue Combined Enterprise System Revenue Refunding Bonds, Series 2025 to Refinance the Refunded 2016 Bonds**

Ashley Ivey, Assistant Finance Director, presented that the City's Combined Enterprise System Revenue Refunding Bonds, Series 2016 outstanding and callable maturities are eligible for a current refunding. Current Financial market conditions are favorable to refund the Combined Enterprise System Revenue Refunding Bonds, Series 2016 debt that was used to refinance system improvements for the water and sewer, natural gas and electric utilities in 2008. Staff would like to refinance this debt in order to take advantage of debt service savings.

Staff has been reviewing opportunities to refinance bonds to take advantage of the current low interest rate market. The City has \$11,416,000 in outstanding callable maturities from the Combined Enterprise System Revenue Refunding Bonds, Series 2016 financing that was issued to refinance system improvements for the water and sewer, natural gas and electric utilities. Based on bank bids that were received on November 12, 2025, the present value savings from refinance of this issue is \$484,841 or 4.30%. This equates to approximately \$73,000 per year in cash flow savings.

Average annual savings are split as follows between enterprise systems:

Water \$12,281

Electric \$51,742

Natural Gas \$8,648

Total \$72,671 average annual savings

The City has received proposals from eight financial institutions to purchase the Bonds. The bank that won the bid is Regions Bank with an interest rate of 3.34%. A series resolution must be adopted to authorize the issuance of \$11,416,000 Combined Enterprise System Revenue Refunding Bonds, Series 2025 to refinance the debt mentioned above. Closing costs will be deducted from the loan proceeds. A budget amendment to appropriate the refinancing expense and offsetting loan proceeds including issuance costs is also necessary. The anticipated closing date is December 16, 2025. All financing documents are available for review in the office of the Finance Director.

General Services Committee is requested to recommend that City Council adopt the Series Resolution R-2025-62 to authorize the issuance of the Combined Enterprise System Revenue Refunding Bonds, Series 2025 and adopt Budget Amendment BA-2025-42 to appropriate the refinancing expense and offsetting loan proceeds.

Committee Member Anthony made a motion to approve the recommendation and forward it to City Council for approval.

Committee Member Anderson seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

**Item 8. Reschedule January 1 General Services Committee Meeting.**

Lisa Strickland, Finance, Director, asked to reschedule the next General Services Committee Meeting to 4:00 pm. Lisa Strickland noted that this timing would allow them to finish before the Disabilities Committee meeting that starts at 5:00pm on the same day.

Committee Member Anthony made a motion to reschedule the General Services Committee Meeting for January 8<sup>th</sup> at 4:00 pm.

Committee Member Anderson seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

**Item 9. Fiscal Year 2025 Audit Contract Amendment.**

Ashley Ivey, Finance Director, presented that the contract for audit services for the City of Monroe to Martin Starnes & Associates, CPA's, P.A. for the year ending June 30, 2025 needs to be amended due to the Federal compliance supplement not being finalized for single audits.

The City has a state single audit that requires this compliance supplement for fiscal year 2025. The audit firm may not issue their audit opinion until this is released by the federal government. The Local Government Commission is requesting an amendment to the contract to extend the deadline for submission from 12/31/2025 to 02/12/2026.

Staff recommends and requests approval by the General Services Committee of the audit contract amendment with Martin Starnes & Associates, CPA's, P.A. to extend the audit submission deadline.

Committee Member Anthony made a motion to approve the audit contract amendment with Martin Starnes & Associates, CPA's, P.A. to extend the audit submission deadline.

Committee Member Anderson seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

**Item 10. Bearskin Creek Greenway/Creff Park Project Bid Award.**

Pete Hovanec, Parks, Recreation and Tourism Director, presented that staff has solicited bids for construction of the Bearskin Creek Greenway and Creff Park Renovations as part of a PARTF grant award from 2023. Staff is requesting approval to award the bid for the Bearskin Creek Greenway/Creff Park renovation to low bidder DAP Contracting.

On October 9th, 2023 the City was awarded a N.C. Parks and Recreation Trust Fund Grant in the amount of \$500,000 in matching funds for the Bearskin Greenway Phase III and Creff park renovation project. This project will include the construction of a greenway path connecting Don Griffin Park to Creff Park and renovation of bathroom facility, addition of an outdoor fitness cluster, and inclusive swing and play equipment areas, multi-purpose kids' zone and a walking loop within the park as part of the Creff Park renovation. On April 11th, 2023 Council adopted a Resolution to allocate the \$500,000 matching funds for this grant.

Staff posted the advertisement for construction bids in early November and received three bids (see attached Bid Sheet). Based on the bids received, staff recommends awarding the Greenway/Renovation project to DAP Contracting in the amount of \$820,479.

Staff requests that the General Services Committee recommend approval to City Council the selection of D.A.P. Contracting as the contractor to complete the Bearskin Creek Greenway/Creff Park project in the amount of \$820,479 and authorize the City Manager to execute all required documents.

Committee Member Anderson made a motion to approve the recommendation of D.A.P. Contracting as the contractor to complete the Bearskin Creek Greenway/Creff Park project.

Committee Member Anthony seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

**Item 11. Clubhouse 1936- Former MC Ballroom Naming**

Pete Hovanec, Parks, Recreation and Tourism Director, presented that The former Monroe Country Club Ballroom is currently under construction/renovation for a transformation into an indoor golf simulator facility complete with food and beverage. Staff is looking to name the indoor golf facility "Clubhouse 1936" in honor of the year the original ballroom was constructed.

Staff is also looking for direction on approval of the presented logo for the facility.

Staff conducted research and solicited feedback from staff and golf course patrons to develop an appropriate and symbolically significant name for the new facility. Clubhouse 1936 was chosen to pay homage to the origins of this historic building and give it a distinguishable name matching its classic details. Staff worked with the communications team to develop a logo and is in the process of developing tag lines, talking points and branding/style guides for the new facility.

Clubhouse 1936 at Monroe Country Club will be used to identify the facility moving forward and we will refrain from using "Ballroom" to reference the facility as we move forward with branding initiatives.

Staff recommends General Services approve the name Clubhouse 1936 for the newly renovated golf simulator and food and beverage facility at Monroe Country Club. Staff also recommends General Services approve the presented logo for Clubhouse 1936 and send both the name and logo to City Council for approval.

Committee Member Anthony made a motion to add it to the City Regular agenda.

Committee Member Anderson seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

**Item 12. Committee on Disabilities Recommendation.**

Ryan Jones, Property Management Director, presented that the Committee on Disabilities has made a recommendation regarding the live streaming of public comment during City Council meetings.

The Committee on Disabilities has made recommendations concerning the City's process specific to live streaming the public comment period. The committee chair, Melinda Plue, drafted a letter outlining those recommendations and is in attendance to provide any other information related to this recommendation.

Committee recommendations have been provided related to streaming the Council public comment for discussion and for the General Services committee to provide direction.

Melinda Plue, Committee on Disabilities, discussed concerns about accessibility for public comments. The Disabilities Committee had submitted a letter expressing their concern that stopping the livestream of public comments would limit access for individuals with disabilities who cannot attend in person.

The council members acknowledged the concern and explained that the decision to stop livestreaming was partly due to the fear of misuse in a politically sensitive time, where some individuals had used the public comment period for uncivil or misleading statements.

The discussion included alternatives like providing transcripts or other accessibility measures, but noted that not everyone is able to read or access written transcripts easily. The council agreed that they need more time to find a balanced solution that would restore accessibility while maintaining a respectful environment.

In the end, the Committee Members decided to take the issue back to the committee for further discussion and potential suggestions before making a final decision.

**Other.**

None.

**There being no further business the meeting adjourned at 5:02p.m.**

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Committee Chairwoman, Julie Thompson





**STAFF REPORT**

**TO:** General Services Committee  
**VIA:** Mark Watson, City Manager  
**DATE:** January 8, 2026  
**FROM:** Lisa Strickland, Finance Director  
**PREPARED BY:** Bethany Hawver, Revenue Manager  
**SUBJECT:** Update to Customer Service Policy to Address Penny Shortage

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**SUMMARY STATEMENT**

Due to the United States Mint halting production of new pennies, staff requests approval of an amendment to the Customer Service Policy FA-02 to provide a procedure for cash payments that are greater than the exact amount due.

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**REVIEW**

Due to the United States Mint halting production of new pennies, staff requests approval of an amendment to the Customer Service Policy FA-02 to provide a procedure for cash payments that are greater than the exact amount due. Staff is requesting the addition of the following section to the Customer Service Policy, SECTION 9. PAYMENT REQUIREMENTS FOR UTILITY SERVICES:

*B. Cash Payments Not Offered in the Exact Amount*

*Cash payments offered in an amount greater than the exact amount due may result in rounding up of the amount paid if the proper currency is not available to provide change. The resulting overage collected will be applied to the subsequent bill.*

The following procedure will be observed:

1. If the payer presents the exact amount owed, payment will be accepted.
2. If the payer does not have the exact amount in cash and staff does not have pennies available to provide change, staff will offer alternate payment methods such as check, credit card, ACH draft.
3. If the payer still prefers to pay in cash, the payment will be rounded up.

4. The payer's account will always be credited for the entire payment amount and the credit will be applied toward the next bill.


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### **RECOMMENDATION**

General Services Committee is requested to recommend City Council approval of the revised Customer Service Policy FA-02.

Attachment: Customer Service Policy FA-02

	<b>Policy:</b> Customer Service Policy	<b>Effective Date:</b> June 15, 1999
	<b>Policy Number:</b> FA-02	<b>Revision Effective Date:</b> September 21, 1999; June 5, 2001;
		June 19, 2001; September 18, 2001; March 5, 2002; June 4, 2002; November 5, 2002, September 16, 2003; July 19, 2005; August 16, 2005, January 3, 2006, August 21, 2007, November 6, 2007, June 3, 2008, August 19, 2008, December 1, 2009, July 20, 2010, September 21, 2011, October 20, 2015, January 8, 2026
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<hr/> <b>Robert Burns, Mayor</b>	<u>Finance and Administration</u> <b>Responsible Party</b>	

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## **CUSTOMER SERVICE POLICY**

### **City of Monroe Service Strategy**

The goal of the City of Monroe is to provide reliable, responsive, quality services to the Community at the lowest reasonable costs to be accomplished through courteous, personal service to meet customers' unique needs while making Monroe a better place to work and live.

### **Customer Service Department Service Strategy**

The goal of the City of Monroe Customer Service Department is to provide quality customer service by administering friendly, flexible service as well as mastering problem solving skills that will give the customer a positive, memorable experience.

## **SECTION 1. PURPOSE OF CUSTOMER SERVICE POLICY**

The purpose of this Customer Service Policy ("Policy") is to inform our customers of the manner in which the City will provide utilities service to them, and to outline our responsibilities in providing these services. This Policy is not meant to be all-inclusive, but is intended to offer direction and guidance to the City and its customers. The Policy also outlines the responsibilities and duties of the customer, recognizing the need to treat all customers in a fair and indiscriminate manner.

The Policy is not meant as a substitute for personal initiative on the part of City employees. It is to serve as a guide for reasonable response to customer needs while meeting the requirements of good business practices on the part of the City.

This Policy may be revised, amended, supplemented, or otherwise changed from time to time by action of the City Council.

Specific policies and procedures related to each utility and its operation are contained in the respective Utility's Service Policy. Copies of each Utility's Service Policy are available at Customer Service and at the City's Utilities Operations Center.

## **SECTION 2. RESPONSIBILITIES OF CITY AND CUSTOMER**

1. Responsibilities of City:
  - A. To treat each customer fairly and equally.
  - B. To review the needs of each customer and provide service that best suits the customer's needs.

- C. To respond to customer complaints and concerns promptly and courteously.
  - D. To provide information on a customer's account when requested by the customer.
  - E. To be respectful of the customer's property.
2. Responsibilities of Customer:
- A. To be responsible in paying their account in a prompt manner each month.
  - B. To provide information requested for provision of service by the City.
  - C. To be respectful and cooperative in dealing with City personnel.
  - D. To safeguard City property that is installed on the customer's property to provide for delivery and metering of service.
  - E. To bring inaccuracies or errors in billing to the City's immediate attention.
  - F. To notify the City of any extenuating circumstances pertaining to the customer's account.

These responsibilities are not intended to be all-inclusive, but are expressed as general guidelines to be followed in the relationship between the City and its customers.

### SECTION 3. DEFINITIONS

**Applicant.** Any person, group of persons, association, partnership, firm or corporation requesting from the City electricity, natural gas, water, solid waste disposal, or waste water services.

**City.** The City of Monroe, North Carolina.

**Customer.** Any person, group of persons, association, partnership, firm or corporation provided utilities services by the City.

**Delivery Point.** The point where the City's lines for supplying utilities are connected to the customer's lines for receiving utilities, unless otherwise specified in the agreement with the customer for the purchase of utilities.

**Deteriorates.** To pass from a high to a lower condition; worsen, depreciate.

**Lines.** The City's conduits (i.e. wire, pipe, etc.) for supplying and/or the customer's conduits (i.e. wire, pipe, etc.) for receiving utilities.

**Owner.** The person, persons, association, partnership, firm, corporation, or other legal entity having legal title to the premises to be served.

**Tenant.** The person, persons, association, partnership, firm, corporation, or other legal entity lawfully occupying the premises to be served.

**Utilities.** One or more of the following services: electricity, natural gas, water, solid waste disposal, or wastewater.

#### **SECTION 4. APPLICATION FOR UTILITY SERVICES**

Only the Owner(s) or Tenant(s) can apply for utility service with the City. The City requires proof that the applicant is the owner or tenant of the premises to be served. The following procedures apply with regard to application for utilities services:

1. A residential applicant requesting utility services with the City must make application to the City for desired services and provide two forms of identification. The following types of non-expired, picture identification will be accepted as a primary form of identification: any official State or government issued driver's license or identification card, alien registration identification card, government passport, permanent resident card,. Secondary forms of identification could be any of the forms of identification listed above or a social security card, employer or taxpayer identification number, a Medicaid or Medicare card, a paycheck stub, an insurance card, a birth certificate, vehicle registration card, veteran's identification card or an employee identification badge. However, for customers that refuse to allow us to make a copy of their two forms of identification, an office visit is required and the two forms of identification are to be shown at the time of the application.
2. A commercial applicant requesting utility services with the City must make application to the City for desired services and provide two forms of identification as specified above. Or a person other than an individual (such as a corporation, partnership, or trust) must show documents showing the existence of the entity, such as certified articles of incorporation, a government-issued business license, a partnership agreement, a trust instrument, a certificate of incumbency or a written statement on company letterhead authorizing the applicant to conduct business on behalf of the company.
3. Application for existing services (connects and/or disconnects) will be completed within 72 hours. Please reference Schedule of Fees and Charges for appropriate charges.
4. The customer shall pay an application fee as set forth in Schedule of Fees and Charges. This charge is to be collected whether there is one or multiple services established at such address. Only one application fee per location shall be charged, and the fee may be added to the customer's first utility bill.
5. On previous accounts receivable, the City will search its records to determine if a previous account existed for new applicants. If an account did previously exist, and it contains a

balance due the City, the balance must be settled in full prior to establishing a new account, or arrangements made to settle an old account.

6. All unpaid account balances on inactive accounts will be transferred to an active account and should be paid in full by the next cutoff date to avoid interruption in utility services at the active location.
7. Pursuant to North Carolina General Statute §160A-32(a)(6b) we are to notify all electric customers that they may be entitled to choose another electric supplier to provide electric service. Although the notice is provided to all customers, customer choice only applies to certain new customers and not to existing customers.

Forms of application (service agreement), contract, schedules, rates and copies of service regulations are available at the City of Monroe Customer Service Building located at 201 E. Windsor Street and will be furnished to the customer on request. The City's mailing address is Post Office Box 69, Monroe, North Carolina 28111-0069 and the telephone number is (704) 282-4511.

All agreements and contracts for service between the City and its customers, including the rate schedules and these service regulations, are subject to such changes and modifications as may be made and approved by City Council, or otherwise imposed by lawful authority.

## **SECTION 5. DEPOSITS**

### **A. Commercial/Non-Profit/Industrial Customer Deposits**

1. Commercial and industrial customers shall, at the time of application for service, pay a deposit as specified in the Schedule of Fees and Charges.
2. In lieu of cash deposit, commercial and industrial customers may provide the City with an irrevocable bank letter of credit or with a surety bond in the amount of the specified deposit valid for a period of 24 months from date of issuance, issued by an insurance company or bank authorized to do business in North Carolina. The City may require that the letter of credit or surety bond be renewed after the initial 24 months if a customer's credit history is determined to be "not good" as defined in the residential customer deposit section.
3. The deposit may be waived for Commercial/Non-Profit/Industrial customers based on credit worthiness as determined by third party reporting agencies or their payment history from a comparable utility. The fee(s) associated with the determination of credit worthiness shall be paid by the customer in accordance to the Schedule of Fees and Charges.
4. If the owner of the business has had previous service with the City under another business name or comparable consumption level as a residential customer, and has

had a “good” utility payment history, the customer may request a waiver from this requirement. However, if at any time the payment record for the business deteriorates, a security deposit shall be required for continued utility service. *(Amended June 19, 2001.)*

- 5. If at any time payment record of a commercial/industrial deteriorates to “not good,” a security deposit shall be required according to the City of Monroe Fees Schedule.
- 6. Non-profit organizations are considered as commercial customers and require a deposit for service as specified above for commercial customers.
- 7. The deposit may be refunded after 24 continuous months of good payment history. The City reserves the right to hold a deposit for longer than 24 months if it deems necessary.

**B. Deposit and Service Disconnect**

- 1. Any customer whose payment history becomes “not good” as defined above shall pay such deposit as required in the Schedule of Fees and Charges to protect the City from loss of revenue. Within ten days of written notice, any customer who fails to make required deposits or provide surety bonds when specified shall be subject to disconnection of service.
- 2. Any present customer without a deposit on file, or whose deposit is less than the deposit required thereunder, and whose service is involuntarily terminated for either non-payment, returned check, meter tampering or other such reason, will be required to pay a deposit or update existing deposit as specified above prior to re-connection of service.

**C. Deposit Requirement**

The City may require the customer to make an initial deposit, based on the current Schedule of Fees and Charges, as a guarantee of the payment for utilities used. In some cases, the City will allow customers to provide proof of credit worthiness in place of the required deposit. Proof of customer credit worthiness may also be obtained by the City through information provided to it by third-party credit reporting agencies.

**D. Residential Customer Deposit**

- 1. Residential Customers of the premises to be served may not be required to provide an initial deposit at the time of application for service if their credit history is determined to be classified as “good.” However, if the applicant’s payment history on prior utilities is determined to be “not good,” the initial deposit shall be required.
- 2. A customer’s credit history shall be classified as “not good” if the customer has two credit offenses of being subject to disconnection for non-payment or having a check

returned to the City for insufficient funds or a combination of the two, during the preceding thirteen month period.

3. If a customer has been classified as “good” for the five consecutive years immediately preceding two credit offenses they will not be classified as “not good” until their third credit offense.
4. If at any time the payment record of a Residential Customer deteriorates to “not good,” a security deposit shall be required according to the City of Monroe Fees Schedule. Payment arrangements for additional deposits of up-to six months may be made when customers are required to pay deposits due to deteriorated credit.
5. The deposit may be refunded after 24 continuous months of good payment history. The City reserves the right to hold a deposit for longer than 24 months if it deems necessary.
6. A deposit will be refunded automatically when service is voluntarily discontinued. All outstanding amounts on the final bill will be deducted from the deposit amount. The remaining deposit amount will be refunded to the customer.
7. Residential customers moving into rented dwellings, houses, apartments, or manufactured homes shall pay an initial deposit at the time of application for service, as defined in the Schedule of Fees and Charges. Customers who can provide a letter of credit reference from their previous utility provider or who have a previous good utility payment history with the City may request a waiver from this requirement. However, as with owner-occupants, if a customer’s payment record deteriorates, a security deposit may be required for continued utility service.
8. In order to provide an additional incentive to offer prospective teachers recruited to teach in the schools located in the City, Council has waived the initial deposit for eligible, new full-time teachers recruited by Union County Public School for teaching jobs in the public schools within the corporate limits of the City. *(Amended April 17, 2007.)*
9. In an effort to assist our military applicants, Council has waived the initial deposit for active duty military applicants. They are required to provide a copy of their active duty papers and if their credit history deteriorates, a security deposit shall be required according to the City of Monroe Fees Schedule. *(Amended August 19, 2008.)*

## **SECTION 6. SELECTION OF RATES**

1. The City, through consultation with the customer, will select the appropriate rate schedule of those available, under which the customer will be billed for each utility service. Copies

of the City's rate schedules may be obtained from the Customer Service Department or at the City's Utilities Operations Center.

2. When the customer notifies the City in writing of changes in the customer's operating conditions or other factors that may affect the selection of the rate schedule, an investigation will be made by the City and the customer will be advised if a change in the rate schedule is appropriate. Any customer who feels he/she is being billed under an inappropriate rate schedule may appeal to the Customer Service Manager.

## SECTION 7. METERING AND METER READING

1. When meters are installed by the City to measure utility services used by its customers, all charges for units consumed, except certain minimum charges, shall be calculated from the readings of such meters.

It is the City's policy to read every utility meter each month. The reading dates are scheduled to fall within the same weekly period each month. The City will strive to maintain a billing cycle of no less than 25 days nor more than 35 days in the billing period. When a connection of service has been made within ten days of reading date, a bill will not be rendered until the following month.

The City reserves the right to estimate usage when extenuating circumstances prevail. However, it is the policy of the City not to estimate an account for two consecutive months, unless unavoidable. Because the metering system is based on "continuous read" meters, estimating consumption for one month will not affect total consumption over a two month period.

If a customer requests a rereading of the meter, a meter reread charge will be levied in accordance with Schedule of Fees and Charges. If it is determined that the initial reading was accurate the fee shall be retained. If it is determined the reading was in error, the fee will be credited to the customer's account.

2. All metering devices installed for the purpose of metering utility service shall be located on the exterior of structures, easily and safely accessible by City personnel, so that they will be accessible for reading and servicing. If metering devices are made inaccessible, the City has the right to disconnection of service, after proper notification by the City.

There are currently a number of meters inside dwellings and businesses. If the meter reader cannot gain entry, the meter is automatically estimated. In case any authorized employee is refused admittance to the premises by the tenant or owner or is hindered by the tenant or owner from making an examination of the meters, the City reserves the right to disconnect utility services until free access is granted to an authorized employee.

When a customer remodels, improves, or makes other alterations to a structure with an external meter, the customer bears all costs associated with the relocation of the meter to

an alternative location so as not to render the meter inaccessible for reading and servicing. Large commercial or industrial customers may be exempt from this requirement.

When a dwelling or business with utility metering devices currently installed inside structures becomes vacant, or is altered, repaired, or renovated, the owner shall cause any interior utility meter or meters to be relocated to the exterior in order to continue to receive utility service.

The City may make reasonable exceptions to this meter location policy when it is mutually determined that it would be in the best interests of the City and the customer to do so.

3. The City will test each of the customer's meters for accuracy upon request once per calendar year. These tests will be charged to the customer based on the Schedule of Fees and Charges. Should the meter be found to be more than two percent (2%) fast because of incorrect calibration, the meter testing fee will be refunded as a credit on the next bill following meter test completion. Meters currently in service may be also be randomly tested by the City at any time.

Upon request, a written report of the results of the test will be made to the customer within ten days after the completion of the test.

## **SECTION 8. METER TAMPERING OR UNAUTHORIZED/UNSAFE CONNECTION TO UTILITY SYSTEM**

Any customer whose service has been disconnected because the meter, lines, or other apparatus serving their residence or business has been tampered with in any manner shall pay such deposit as required to protect the City from loss of revenue, in addition to penalties and re-connection fees as defined in the Schedule of Fees and Charges. Customer may also be subject to any civil or criminal penalties as may be imposed by City, State, or Federal regulations.

Tampering with utility meters is expressly prohibited by North Carolina General Statute §14-151.1 and is punishable by fines and/or imprisonment. For purposes of this Policy, load management devices are considered to be the same as meters and will be treated in the same manner.

Any customer or outside party who makes an unauthorized, unsafe or unmetered connection to any City utility system shall be subject to the penalties and fees as defined in the Schedule of Fees and Charges.

## **SECTION 9. PAYMENT REQUIREMENTS FOR UTILITY SERVICES**

1. Adjustments to Prior Billings

If the City has inadvertently overcharged or undercharged for utility service, the City will notify the active customer of the error and a billing adjustment will be made as follows:

- A. Amount will be refunded or billed to the customer for the period of overcharge or undercharge, not to exceed one year.
  - B. Usage and demand will be estimated if exact usage cannot be determined.
  - C. The reimbursement to the City resulting from underpayments may be paid out no longer than over the same period of time that the underpayment occurred.
2. A. Application of Payment

The City reserves the right to apply any payment or payments made by the customer in whole or in part to any account due the City by the customer in connection with the furnishing of utility services.

**B. Cash Payments Not Offered in the Exact Amount**

Cash payments offered in an amount greater than the exact amount due may result in rounding up of the amount paid if the proper currency is not available to provide change. The resulting overage collected will be applied to the subsequent bill.

3. Billing Procedures

Utility charges shall begin when the utility is installed and the service line is connected to the premises. Service charges will commence 90 days after the tap is installed, or when meter is installed (if service was pre-installed by a developer), if the service line to the premises has not been installed.

Utility bills are mailed to each customer once each month and are due upon receipt. Bills are considered delinquent if not paid by the “current charges past due date” as shown below, and a service fee is assessed.

Example for September bill cycles:

<b>Bill Cycle</b>	<b>Current Charges Past Due After</b>	<b>Bank Draft Date</b>	<b>Subject to Disconnection Date</b>
September 7	October 3	September 28	October 13
September 14	October 10	October 6	October 20
September 21	October 17	October 13	October 27
September 28	October 24	October 20	November 3

Unless payment is made, service will be subject to disconnection on the cutoff date as listed above. When the delinquent date falls on a weekend or holiday, the next working day will be considered as the delinquent date.

The City shall use the United States Postal Service to distribute utility bills. Any customer who fails to receive a billing is not relieved of payment responsibility and should contact the City to determine the amount of said billing prior to the delinquent date. If payment is received past the close of business on the delinquent date, a penalty according to rates established in the Schedule of Fees and Charges will be applied.

4. Payment Arrangements and Waiver of Penalties

- A. Only questions of proper billing or billed deposits will be considered for payment arrangement. Any customer disputing the correctness of the bill shall have the right to a hearing as stated in Section 15.
- B. Requests for delay or waiver of penalties will not be considered except under the requirements specified in Section 15.

5. Payment Arrangements by Social Service Agencies

The City recognizes that, due to financial hardship or other circumstances, customers may sometimes require the assistance of Social Service agencies to pay their utility bills. The City reserves the right to modify the above payment requirements so that Social Service agencies or other recognized community service agencies may be allowed to assist customers.

6. Payment Extension Agreement

Contact with a City customer service representative prior to disconnection is always more favorable than making arrangements after service is involuntarily interrupted. Payment options may be available prior to disconnection that will save the customer from additional higher deposit amounts and additional fees.

A. Residential

An extension will be made on utility payments if the customer has made arrangements with the City and has signed a Payment Extension Agreement and Promissory Note, approved by the Customer Service Representative. All requests must be made by the tenant of record or the owner. No more than three payment extensions will be granted in a 12-month period. These extensions cannot be consecutive. The City has the right to grant more than three extension requests if it determines it would be in the City's interest to do so.

Each customer's credit history shall determine the terms of extension that can be granted, based on the customer's 12-month credit history. In no instance will the extension be greater than ten calendar days from disconnection date, unless in the City's judgment extenuating circumstances apply.

If payment is not made as agreed to in the Payment Extension Agreement and Promissory Note, service will be discontinued without further notice, and all payments, including any disconnect and reconnect charges, will have to be received by the City before reconnecting service.

B. Commercial/Non-Profit/Industrial

An extension will be made on utility payments if the customer has made arrangements with the City and has signed a Payment Extension Agreement and Promissory Note approved by the Customer Service Manager. All requests must be made by an authorized representative of the company. No more than three payment extensions will be granted in a 12-month period. The City has the right to grant more than three extensions request if it determines it would be in the City's interest to do so.

Each customer's credit history shall determine the terms of the extension that can be granted, based on the customer's 12-month credit history.

If payment is not made as agreed to in the Payment Extension Agreement and Promissory Note, service will be discontinued without further notice, and all payments, including any disconnect and reconnect charges, will have to be received by the City before reconnecting service.

7. Place of Payment

Bills are payable at the City Collections Office or to any agent or agency authorized by the City. When service has been discontinued due to nonpayment, payment must be made at the City Collections Office. Payments shall be made without regard to any offset.

## SECTION 10. CREDIT HISTORY

1. The City will maintain a credit record on all customers based on historical payment of utility bills.
2. The cut-off list will be prepared by the City for each billing cycle from customers who fail to pay utility accounts by the subject to disconnection date.
3. The City will furnish information regarding a customer's credit history only upon the written request of the customer.

## SECTION 11. RETURNED CHECKS

1. When a customer's check is returned by the bank on which it is drawn because the bank will not honor it, for any reason, the customer will be notified that the check was not honored and that service will be terminated on a specified date unless the check is made good. A returned check can be made good by presenting cash, money order or certified funds. The returned check will not be re-deposited nor will another check be accepted for the returned check.
2. When a customer has a check returned, a service charge will apply in addition to any other charges and fees (*See Schedule of Fees and Charges*).
3. The City reserves the right to require a customer to pay utility bills in cash when two or more returned checks are received during the previous thirteen month period.

## SECTION 12. ALTERNATIVE FORMS OF PAYMENT

1. Budget Billing Program
  - A. The purpose of Budget Billing is to spread the cost of utility services evenly, on a monthly basis, over an annual period. This program is designed for those customers who wish to ease the impact of seasonal billings and level their monthly payments. Budget Billing does not raise or lower the annual utility billings; it does allow the customer to plan ahead by establishing a fixed-monthly payment amount. (*Adopted September 18, 2001.*)
  - B. This program is available only to residential customers with good credit payment history and 12 consecutive months of service at the current location. Due to the seasonal nature of utility billings, customers may enter the program in the billing month of May only. Both outstanding and current balances must be paid before the first Budget Billing due date. (*Adopted September 18, 2001.*)
  - C. The City will monitor each account and reserves the right to adjust the Budget Billing amount, should actual billings differ substantially from estimated billings. (*Adopted September 18, 2001.*)
  - D. The 12<sup>th</sup> month of the Budget Billing is settlement billing month. This month's billing will reflect either an additional payment or credit issued to the account to balance all billings for the year to all payments. Should the required payment be more than the Budget Billing payment, the customer must pay the additional amount. Should Budget Billing payments exceed annual billings, the excess (credit) will be refunded to the customer. (*Adopted September 18, 2001.*)
  - E. The City reserves the right to adjust the Budget Billing amount to reflect rate increases approved by City Council. (*Adopted September 18, 2001.*)

- F. A customer may discontinue use of the Budget Billing program by written request at any time. Settlement of additional amounts due or credit for the current billing year shall be made at the time of discontinued use of the program. *(Adopted September 18, 2001.)*
- G. Should a Budget Billing account become delinquent, the entire balance may be declared due and payable, and the account no longer eligible for the program. *(Adopted September 18, 2001.)*

2. Credit/Debit Card

The City provides a convenient program to allow for a customer's utility bill to be charged to his/her credit/debit card. This relieves the customer from having the possibility of lost or late payments or the cost of an envelope and stamp. At the customer's option, the City will charge his/her credit/debit card for the amount of his/her bill. The customer still receives a copy of the bill for his/her review.

By allowing the credit/debit card to be charged, a customer does not forego his/her right to contest a bill or to have a correction for a billing error. The correction would be made in the form of a refund, a credit, or a charge to the account. If the credit/debit card charge is revoked for any reason, the same remedies the City has under Section 11 regarding returned checks shall apply.

3. Direct Draft

The City provides a convenient program to allow for a customer's utility bill to be drafted from his/her checking account. This relieves the customer from having the possibility of lost or late payments and saves a trip to Customer Service or the cost of an envelope and stamp. At the customer's option, the City will draft his/her bank account each month for the amount of his/her bill. The draft will occur 22 days after the billing date. The customer still receives a copy of the bill for his/her review.

By allowing the draft, a customer does not forego his/her right to contest a bill or to have a correction for a billing error. The correction would be made in the form of a refund, a credit, or a charge to the account. If the draft is returned due to insufficient funds, the same remedies the City has under Section 11 regarding returned checks shall apply.

**SECTION 13. DISCONTINUANCE OF SERVICE**

1. Circumstances Beyond Customer's Control

If, during the term of agreement for furnishing utilities to a customer, the customer is unable to operate his/her facilities in whole or in part, because of accident, act of God, or fire occurring at the location where utilities are supplied, the charge for units during the

period reasonably necessary to correct any such conditions may, in the City's discretion, be reasonably adjusted in accordance with all pertinent facts and conditions.

## 2. Customer's Rights Prior to Discontinuance of Service

- A. It is the policy of the City to discontinue utility service to customers by reason of nonpayment of bill only after proper notice and a meaningful opportunity has been given to be heard on disputed bills.
- B. If any customer disputes the accuracy of his/her bill, they have a right to a hearing at which they may be represented in person or by any other person of their choosing and may present, orally or in writing, their complaint and contentions.
- C. Any customer desiring a hearing should contact the Customer Service Office located in the Customer Service Building, 201 E. Windsor Street, Monroe, North Carolina. The Customer Service Manager is authorized to make a final determination of the complaint and has the authority to order that service not be discontinued.

## 3. Involuntary Discontinuance of Service

- A. The City reserves the right to discontinue furnishing utility services to a customer, at any time without notice, upon the occurrence of any one or more of the following events:
  - 1) Whenever the City has reasonable cause to believe that the customer is receiving utilities without paying for them, or that the City's meters, lines, or other apparatus have in any manner been tampered with.
  - 2) Whenever, in the City's opinion, the condition of the customer's lines, equipment and/or appliances are unsuitable for receiving services, or pose potential safety or health hazards to City property, City personnel, the customer, or to the public.
  - 3) Whenever the City determines that the customer's use of utilities or equipment interferes with or may be detrimental to the City's utilities systems or to the supply of utilities by the City to any other customer, including the violation of any City ordinances regarding the use of any utilities.
  - 4) Whenever the customer has denied an authorized City representative access to the City's meters, lines, or other apparatus installed on the customer's premises.
  - 5) Whenever it is necessary to prevent fraud upon the City.

- B. The City will discontinue the supply of utilities to a customer whenever requested by any public authority having jurisdiction.
- C. The City reserves the right to discontinue the supply of utilities under any of the above conditions irrespective of any claim of a customer pending against the City, or any amounts of money on deposit with the City as required in Section 5.
- D. Whenever the supply of utilities is discontinued in accordance with this policy, the City shall not be liable for any damages, direct or indirect, that may result from such discontinuance or reconnection.
- E. As a general rule, the City will not disconnect a customer’s utility service after 1:00 p.m. on a Friday, on the day before a holiday, or on a weekend or holiday. However, in certain instances in which a service presents a hazardous, life threatening, or otherwise undesirable condition or in instances of meter tampering, the City reserves the right to discontinue utility service at any time (as stipulated earlier in this section).
- F. As a general rule, the City will not disconnect a residential customer’s service if the predicted heat index for the day of disconnection is in excess of 100° Fahrenheit, or the predicted wind chill index for the day of disconnection is below 32° Fahrenheit. This delay in disconnection for nonpayment will not preclude the City from disconnection at a future date, and does not change a customer’s liability for payment of all bills and fees. *(Amended July 20, 2010.)*

4. Voluntary Discontinuance of Service

In order to insure discontinuation of services at a time requested by the customer, notice to the City in advance is required. When a customer desires to discontinue service, notice must be given to the City at least 24 hours in advance on a workday. The customer will be responsible for all services consumed up until the time the services are disconnected by the City.

**SECTION 14. RECONNECTION OF UTILITY SERVICES**

- 1. If utility services have been discontinued for any of the reasons covered by Section 13, “Discontinuance of Service,” the City shall have two working days to reconnect the customer’s service after the conditions causing discontinuance have been corrected.
- 2. If utilities have been discontinued because of improper use, or if in the City’s opinion its meters or lines or other apparatus have been tampered with, the City may refuse to reconnect the customer’s service until the customer has done the following:
  - A. Paid all utility charges currently owed.

- B. Paid to the City an amount estimated by the City to be sufficient to cover the utilities used but not recorded by metering devices and not previously paid for, plus a special reconnection charge (*see Schedule of Fees and Charges*), plus any actual cost for damages to City apparatus.
- C. Made such changes in lines or equipment as may, in the opinion of the City, be proper for the City’s protection.
- D. Achieved compliance with Ordinances or regulations on utility use when disconnected for violation thereof.
- 3. If utility service has been discontinued by the City at the request of any public authority having jurisdiction, the customer’s service will not be reconnected until authorization to do so has been obtained from the public authority.
- 4. When it becomes necessary for the City to discontinue utility service for any reason, service will be reinstated only after payment of all past due utility bills and any deposit that may be required by Section 5. Applicable reconnect charges are summarized in the Schedule of Fees and Charges. Applicable penalties and any reconnection fee in effect at the time of discontinuance of service must also be paid before service will be restored.
- 5. In the event the customer’s premises are destroyed by fire or other casualty, or the operation of its plant is shut down because of strike, fire, or other causes beyond customer’s control, causing a complete cessation of the use of service, upon written notice by the customer to the City within 30 days thereafter, advising that the customer intends to resume service as soon as possible, any minimum charge or guarantee for which the customer may be liable will be waived during the period of such cessation, and the term of the contract shall be extended for a corresponding period; otherwise, the agreement for service shall immediately terminate.

**SECTION 15. REVIEW PROCESS**

- 1. Any customer who believes an error has been made in an account balance or the amount of a bill shall be able to appeal a decision, based on the following order of sequence:

First Review:	To the Customer Service Representative.
Second Review:	To the Customer Service Supervisor.
Third Review:	A scheduled appointment with the Director of Finance.
Final Review:	A written request to the City Manager or Director of Finance.

- 2. The City Manager or his/her designee may establish payment arrangements or provide a waiver of penalties for cases of billing error resulting from improperly programmed computers, malfunctioning meters, where proper notice was not given, procedures were

not followed by City employees, or any other similar errors not caused by the fault of the customer.

## **SECTION 16. RESPONSIBILITIES WITH REGARD TO PROVISION OF SERVICES**

1. The customer shall be responsible at all times for the safekeeping of all City property installed on the customer's premises, and to that end, shall give no one except authorized City employees access to such property.
2. The customer shall be liable for the cost of repairs or damage to the City property on the customer's premises resulting from the negligence or misuse by other than City employees.
3. Utilities are supplied by the City and purchased by the customer upon the express condition that once utilities pass the delivery point they become the property of the customer to be used only as herein provided. The City shall not be liable for loss or damage to any person or property whatsoever, resulting directly or indirectly from the use, misuse, or presence of said utility after it passes the delivery point or for any loss or damage resulting from the presence, character or condition of the lines, or equipment of the customer, or for the inspection or repair thereof.
4. The City agrees to use reasonable diligence in providing for regular and uninterrupted utilities services. The City shall in no case be liable to any customer for any defect in quality, quantity, pressure, interruption or the discontinuance of any of these utility services in the event of any natural disaster, strike, accident, adverse legal proceeding or action, act of God, or other circumstances beyond the control of the City.
5. The customer shall be responsible for the maintenance and repair of the customer's lines and equipment. Should the customer report trouble with the supply of utilities, the City will respond to such call with the purpose only of correcting such trouble as may be in the City's equipment supplying the customer. If the trouble appears to be in the customer's line or appliances, the City's employees may, if requested by the customer, make such inspection of the customer's lines or equipment as the City's employees are prepared to make, but any inspection of the customer's lines or equipment by the City's employees is made upon the express condition that the customer assumes the entire and sole risk, liability and responsibility for all acts, omissions and negligence of the City's employees. The City retains all responsibility only with respect to the action of its employees in connection with property owned by the City.

## **SECTION 17. PRIVACY OF BILLING DATA POLICY**

All billing data is the property of the City of Monroe.

1. Commercial Accounts

Billing and account information will not be disclosed to the media, other businesses, agency or individuals without the expressed written consent of the individual business account holder on a form provided authorizing the City to release the information.

2. Residential Accounts

Billing and account information will not be given to the media, business, agency or individual not included on the account without the expressed written permission of the account holder on a form provided authorizing the City to release the information. Current billing information may be released (without any account history) when it is deemed in the best interest of the city and the individual account holder in order to aid the account holder in paying the current bill.

Information may be shared at the discretion of the city with another governmental agency that is included under the limitation of the privacy legislation and any information shared shall be used solely for the benefit of said agency and upon written consent that all information provided shall not be disclosed to any other individual or entity.



**STAFF REPORT**

**TO:** General Services Committee  
**VIA:** Mark Watson, City Manager  
**DATE:** January 8, 2026  
**FROM:** Lisa Strickland, Finance Director  
**PREPARED BY:** Lisa Kerner, Grant Administrator  
**SUBJECT:** Acceptance of SelectSites Readiness Program Grant funds and Budget Ordinance for the Monroe Expressway Commerce Park Project

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**SUMMARY STATEMENT**

Staff recommends that the General Services Committee approve the acceptance of \$1,341,205 from the SelectSites Readiness Program, Implementation Phase to be used for site development of the Monroe Expressway Commerce Park Project. Specifically, the funding will be used for water system upgrades (\$292,989) and site clearing (\$1,048,216). Funding was awarded on September 25, 2025 in response to an application submitted on September 3, 2025.

This is in addition to the City’s application to the SelectSites Program, Due Diligence Phase, and the award of \$440,200 in March of 2025.

A Budget Ordinance is required to appropriate the \$1,341,205 in SelectSites grant funding to the Monroe Expressway Commerce Park Project.

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**REVIEW**

The SelectSites Readiness Program, managed by the North Carolina Department of Commerce, amended its program guidelines, broadening eligible expenses from only due diligence costs to include costs related to site acquisition; design, planning, and installation of eligible infrastructure (water, gas, sewer, transportation), and on-site preparation. On-site preparation includes clearing, grading, and other related expenses.

The General Services Committee approved the application submission on August 7, 2025, and City Council approved the item as part of the consent agenda at its meeting on August 12, 2025.

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**RECOMMENDATION**

Staff recommends the General Services Committee recommend City Council acceptance of the grant award of \$1,341,205 for the Monroe Expressway Commerce Park Project and recommend approval of a Budget Ordinance to appropriate the \$1,341,205 of SelectSites Readiness Program funds to for the Monroe Expressway Commerce Park Project.

Also, Staff recommends that the General Services Committee recommend that City Council authorize City Manager Mark Watson to sign and execute all documents related to the SelectSites grant in the amount of \$1,341,205 for the Monroe Expressway Commerce Park Project.

Attachment: Budget Ordinance BO-2026-01

**CAPITAL PROJECT BUDGET ORDINANCE  
SELECTSITE READINESS PROGRAM GRANT  
BO-2026-01**

**WHEREAS**, property along Sutherland Avenue was purchased in August 2018 for the purpose of future economic development; and

**WHEREAS**, the City was awarded a Selectsite Readiness Program Grant from the North Carolina Department of Commerce in the amount of \$440,200 in March 2025 to be used for preliminary engineering, environmental testing and other activities to develop the site and attract industry; and

**WHEREAS**, the City was awarded an additional \$1,341,205 on September 25, 2025 for site development of this site including water system upgrades and site clearing.

**NOW, THEREFORE, BE IT ORDAINED**, that the City Council hereby accepts the Selectsite Readiness Program Grant and appropriates the following revenues and expenditures to the existing project WR1930:

**Water & Sewer Capital Project Fund:**

Revenue:	
Restricted Revenue	\$1,341,205
Expenditure:	
WR1930 – Land Industrial Park #3	\$1,341,205

Adopted this 13<sup>th</sup> day of January, 2026.

Attest:

\_\_\_\_\_  
Robert Burns, Mayor

\_\_\_\_\_  
Bridgette H. Robinson, City Clerk



**STAFF REPORT**

**TO:** General Services Committee  
**VIA:** Mark Watson, City Manager  
**DATE:** January 8, 2026  
**FROM:** Lisa Strickland, Finance Director  
**PREPARED BY:** Lisa Kerner, Grant Administrator  
**SUBJECT:** Acceptance of ElectriCities Downtown Revitalization Grant Funds

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**SUMMARY STATEMENT**

Staff recommends the General Services Committee approve the acceptance of \$10,000 in grant funds from ElectriCities. The funding is to be used for the renovation of the American Bank building and furnishings for the planned Downtown welcome center. There is no matching requirement for this grant. Total project costs are approximately \$255,000.

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**REVIEW**

The ElectriCities Downtown Revitalization Grant program opened on September 15, 2025 and closed on September 30, 2025. Staff prepared and submitted an application for submission ahead of the deadline. The General Services Committee approved the application submission on October 2, 2025. City Council approved the application submission and subsequent grant funding at its meeting on October 14, 2025. ElectriCities announced Monroe as a recipient of the grant award on October 14, 2025.

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**RECOMMENDATION**

The General Services Committee is requested to provide a favorable recommendation to City Council to approve the acceptance of \$10,000 in grant funding from ElectriCities, approve Budget Ordinance 2026-02, and approve adding this matter to the Consent Agenda for City Council approval on January 13, 2026.

Attachment: Budget Ordinance 2026-02

**CITY OF MONROE, NORTH CAROLINA  
CAPITAL PROJECT BUDGET ORDINANCE  
DOWNTOWN OFFICE RENOVATION  
BO-2026-02**

**WHEREAS**, project MP2503 was established on August 12, 2025 to provide funding for the renovation of the American Bank Building to be used for downtown offices; and

**WHEREAS**, staff applied for an ElectriCities Downtown Revitalization Grant to assist with this initiative; and

**WHEREAS**, ElectriCities awarded the City a grant in the amount of \$10,000 toward this renovation project.

**NOW, THEREFORE, BE IT ORDAINED** that the City Council of the City of Monroe appropriates funding to the existing project MP2503 for Downtown Office Renovation.

General Capital Project Fund:

Revenue:

    Restricted Revenue \$10,000

Expense:

    Project Costs (MP2503-Downtown Office Reno) \$10,000

Adopted this 13<sup>th</sup> day of January, 2026.

\_\_\_\_\_  
Robert A. Burns, Mayor

Attest:

\_\_\_\_\_  
Bridgette H. Robinson, City Clerk



**STAFF REPORT**

**TO:** General Services Committee  
**VIA:** Mark Watson, City Manager  
**DATE:** January 8, 2026  
**FROM:** Jeffrey Wells, Assistant City Manager  
**PREPARED BY:** Jeffrey Wells, Assistant City Manager  
**SUBJECT:** Request by Geetha Vallabhaneni and Srinivas Kollipara to Relocate Crook Cemetery Located on Secrest Shortcut Road

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**SUMMARY STATEMENT**

The Crook Cemetery is located on Secrest Shortcut Road just north of US Highway 74. There is currently no address for the property. It is identified as Union County parcel # 09216076C and sits just northeast of the shopping center at the intersection of US 74 and Secrest Shortcut Road. The property is 5.5 acres.

The property owners wish to relocate the Crook Cemetery for future development and to provide better protection for the remains by relocating them to a cemetery with perpetual care. Suncrest Cemetery is the desired relocation. Per North Carolina General Statute 65-106, any person, firm, or corporation who owns land which an abandoned cemetery is located must get the consent of the governing body to relocate the remains.

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**REVIEW**

Richard Grubb and Associates was hired by Geetha Vallabhaneni and Srinivas Kollipara to complete the historical investigation and relocate the graves as defined in the North Carolina General Statutes.

The cemetery dates back to 1889. The most recent known burial date is 1975. The estimated number of graves at the site is 24. The cemetery is located in the southwest quadrant of the property. The cemetery area is bounded by a metal chain. A large tree is located within the

cemetery area. The cemetery site was assessed for a Local Historic Landmark Evaluation and was found to not meet any of the eligibility requirements.

Additional work by Richard Grubb and Associates to satisfy NC General Statute 65-106 included identifying descendants of persons interred in the cemetery. A legal advertisement ran for four successive weeks in the Enquirer-Journal: October 11, 18, 25 and November 1, 2025. Letters were sent to 133 descendants on November 3, 2025. To date, 10 responses have been received.

Suncrest Cemetery, owned and maintained by the city, is the proposed site for re-interment of the Crook Cemetery. Relocating the remains to Suncrest Cemetery will provide the descendants opportunity to visit the graves and have assurance that the graves are protected and maintained in perpetuity.

Richard Grubb and Associates will complete the disinterment/re-interment of the 24 estimated graves including:

- On-site archeologist
- Equipment needed
- Equipment operator
- Licensed Funeral Director
- Coordination with Health Department
- Preparation of all forms
- Certificate recorded in the Register of Deeds

The property owners will be responsible for all costs associated with disinterment and re-interment.

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### **RECOMMENDATION**

Staff recommends approval of the relocation of Crook Cemetery as defined by North Carolina Statute 65-106.

Staff requests the General Services Committee recommend to City Council the relocation of Crook Cemetery as defined by North Carolina General Statute 65-106.

If the General Services Committee recommends approval, the request will be placed on the January 13<sup>th</sup> 2026 City Council Regular Meeting Consent Agenda for action.

Attachment:

Historical Investigation for the Crook Cemetery completed by Richard Grubb and Associates



December 16, 2025

Mr. Jeffrey Wells  
Assistant City Manager  
City of Monroe  
[jwells@monroenc.org](mailto:jwells@monroenc.org)

Re: Request to relocate an estimated 24 graves in the Crook Cemetery on Secrest Short Cut Road, Monroe, Union County, North Carolina.

Mr. Wells:

I am writing on behalf of Geetha Vallabhaneni and Srinivas Kollipara, the owners of the 5.5-acre parcel at 0 Secrest Short Cut Road (PIN 09216076C), which contains the Crook Cemetery. The property owners are in the process of marketing the 5.5-acre parcel for future development. Ms. Vallabhaneni and Mr. Kollipara are requesting approval from the Monroe City Council to relocate the graves within the Crook Cemetery to the Suncrest Cemetery at the intersection of Bickett Street and Johnson Street in Monroe, as allowed by North Carolina General Statute 65-106. The Crook Cemetery is estimated to contain 24 graves; however, unmarked graves may be present, and the total number of graves may exceed 24. RGA has prepared the attached technical report to provide the Monroe City Council with supporting documentation to consider this request to relocate the graves.

With this letter I am requesting that this request to relocate graves be placed on the agenda of a future Monroe City Council meeting for its consideration.

Please do not hesitate to contact me should you have any questions or wish to discuss any aspect of the attached report. I can be reached by email at [eturco@rgaincorporated.com](mailto:eturco@rgaincorporated.com), or by phone at 640-203-8589.

Ellen Turco  
Principal Architectural Historian  
North Carolina Branch Manager

cc: Geetha Vallabhaneni and Srinivas Kollipara



# HISTORICAL INVESTIGATION



## FOR THE PROPOSED RELOCATION OF THE CROOK CEMETERY

Secret Short Cut Road, Monroe,  
Union County, North Carolina

### PREPARED FOR:

Geetha Vallabhaneni and Srinivas Kollipara  
8027 Tottenham Drive  
Harrisburg, North Carolina 28075

December 2025

**RGA Technical Report No. 2025-290NC**



RICHARD  
GRUBB &  
ASSOCIATES

**HISTORICAL INVESTIGATION  
FOR THE PROPOSED RELOCATION OF THE CROOK  
CEMETERY**

**Secret Short Cut Road, Monroe,  
Union County, North Carolina**

**Principal Investigator:**

Olivia Heckendorf, MA

**Author:**

Olivia Heckendorf, MA

**Prepared by:**

Richard Grubb & Associates, Inc.  
525 Wait Avenue  
Wake Forest, North Carolina 27587

**Prepared For:**

Geetha Vallabhaneni and Srinivas Kollipara  
8027 Tottenham Drive  
Harrisburg, North Carolina 28075

**Date:**

December 2025

**RGA Technical Report No. 2025-290NC**

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## APPENDICES

Appendix A: North Carolina General Statute 65-106

Appendix B: Legal Advertisement Affidavit and Next-of-Kin Letter

## **1.0 INTRODUCTION AND PROJECT BACKGROUND**

On behalf of Geetha Vallabhaneni and Srinivas Kollipara (the property owners), Richard Grubb & Associates, Inc. (RGA) has completed this historical investigation to inform the request to relocate the Crook Cemetery on Secrest Short Cut Road in Monroe, Union County, North Carolina (Figures 1.1–1.2). This report details the results of the historical background research and documents the steps taken to identify the decedent’s next-of-kin.

The cemetery lies near the southwest corner of a 5.5-acre parcel of land (PIN 09216076C; the subject parcel) which is owned by Ms. Vallabhaneni and Mr. Kollipara. The subject parcel is bounded by single-family homes to the north and east, a single-family dwelling and commercial buildings fronting West Roosevelt Boulevard to the south, and Secrest Short Cut Road to the west. The property owners are in the process of marketing the property for development. There are no development plans for the site at this time.

This report was prepared to inform the request to relocate the Crook Cemetery before Monroe’s City Council. Ms. Vallabhaneni and Mr. Kollipara are requesting approval to relocate the graves within the Crook Cemetery to Suncrest Cemetery in Monroe, as allowed by North Carolina General Statute 65-106 Removal of Graves (Appendix A). The purpose of the request is to accommodate the parcel for future development purposes and to provide better protection of the remains by relocating them to a cemetery with perpetual care. All expenses related to the disinterment and reinterment of the graves will be borne by the property owners.

The author of this report meets the Secretary of the Interior’s Professional Qualifications for History and Architectural History.

### **1.1 Environmental Setting**

The Crook Cemetery lies in central Union County, approximately 1.6 miles northwest of downtown Monroe. The cemetery lies in the southwest corner of a 5.5-acre parcel (PIN 09216076C), encompassed by an active agricultural field. The cemetery has a circular form and is contained by a fence made of a single chain and metal posts. The surface of the cemetery is covered with pea gravel, with some impeding grass. A large holly bush marks the cemetery’s north end.

### **1.2 Cemetery Context**

Burial places and customs reflect the cultural traditions of their communities. Despite regional variations, most cemeteries throughout North Carolina share common features that are a product of European and Christian burial practices, among them the prevalent east–west orientation of individual graves, with the head to the west. Gravemarkers can be made of wood, clay, stone, or concrete, and can be either handcrafted or commercially produced. Gravemarkers types can reflect differences in wealth, literacy, ethnicity, and religion. Unmarked graves may also be present within a cemetery either because they were never marked or due to the ephemeral nature of the original marker. Graves within a cemetery may also be identified through depressions caused by the collapse of the grave shaft over time. In Union County, cemeteries can be divided into three main categories: family or folk cemeteries, church cemeteries, and community cemeteries.

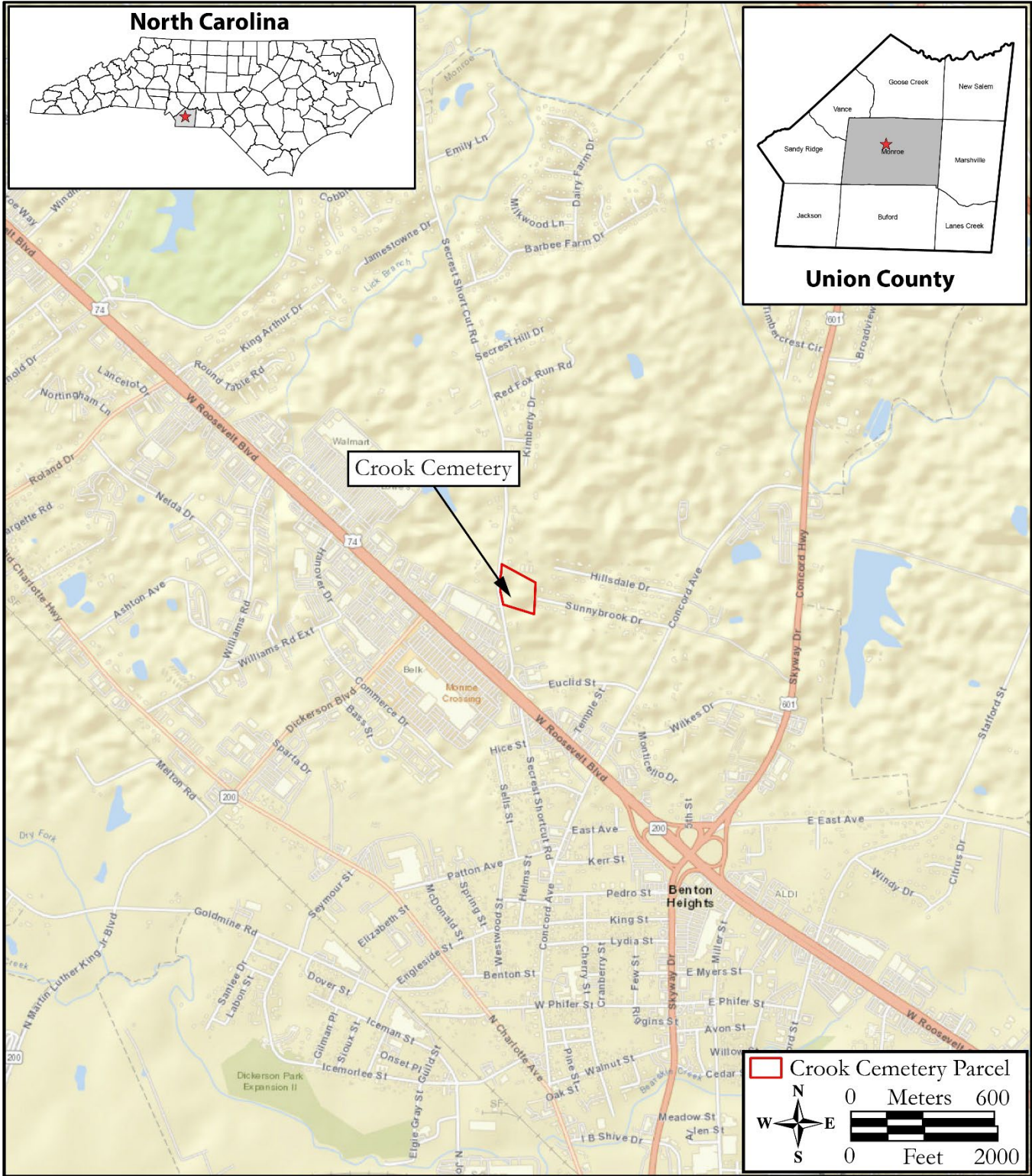


Figure 1.1: Street map showing the location of the Crook Cemetery (Esri 2022a).



Figure 1.2: Aerial map showing the location of the Crook Cemetery (Estri 2022b).

Family cemeteries offered a practical solution for a dispersed, rural population until well into the twentieth century. Transporting a coffin over unimproved roads a substantial distance was not possible for many North Carolinians, making burial close to home a necessity. Burials on family land also reinforced ties of kinship within a community, as multiple generations would be interred in plots that remained under family ownership. Family cemeteries range from informal plots with unmarked graves to fenced or walled cemeteries containing neat rows of marked graves. The Crook Cemetery is an example of a rural family cemetery.

Many family cemeteries were started on family land and were active for a relatively limited period of time. These cemeteries provided a sacred place on family land where cherished family members were laid to rest near the homesite so the family could visit and honor them. Some of these cemeteries were active for years but were abandoned when descendants migrated to other areas and the family land was sold. According to Harvard landscape scholar, John Stilgoe, in small cemeteries, after families stopped maintaining them, “the few small stones were submerged in leaves and humus, and only a low wall or stand of cedars or mimosas announced the land’s former use,” and “Southern burial was always uncertain because the caretakers were likely to move away, but graveyards were carefully respected whether cared for or not” (Stilgoe 1983:229). This seems to be what occurred at the Crook Cemetery.

Church cemeteries can be found in rural, small town, and urban settings. They are characterized by their proximity to their associated churches, with some dating prior to the construction of the church building. Burials are typically arranged in linear fashion and are oriented east–west. Church cemeteries may contain burials spanning over a century, with new interments continuing into the present.

Community cemeteries became more common in the twentieth century, as improved roads and modern mortuary services gave people who no longer owned ancestral land or were not affiliated with a church a place to bury their dead. These types of cemeteries can be privately owned and managed or operated by municipalities. An individual or family plot could be purchased, with the assurance that maintenance would be provided in perpetuity, relieving the family of that burden. Like larger church cemeteries, community cemeteries may grow over many decades, following planned layouts defined by circulation patterns and landscaping.

## 2.0 METHODOLOGY

### 2.1 Historical Background Research

Background research was conducted for the following purposes: to locate previously identified historic properties (buildings and cemeteries) on and around the subject parcel; to attempt to identify individuals interred at the Crook Cemetery and to glean personal information about those interred; and to notify next-of-kin.

Genealogical research was primarily conducted online. Three electronic cemetery databases (www.findagrave.com, www.cemeterycensus.com, and www.interment.net) were consulted. The Find a Grave database includes an entry for the Crook Cemetery (Cemetery ID 2258942). According to Find a Grave, the oldest burial is that of Charles E. Crook in 1889, and the most recent burial dates to 1975 for Horace S. Crook. Table 2.1 contains the list of eighteen burials in the Crook Cemetery, according to the Find a Grave database.

Table 2.1: Names of individuals buried in the Crook Cemetery in the Find a Grave database.

Name <sup>1</sup>	Birth Date	Death Date
Miney Baucom	1903	Unknown
Isaac Bernard Belk	22 December 1911	15 December 1913
Charles E. Crook	25 February 1873	20 August 1889
Eliza Jane <i>Medlin</i> Crook	1814	16 April 1899
Harriett Emmaline <i>Gurley</i> Crook	23 July 1850	20 December 1913
Hattie <i>Horne</i> Crook	2 November 1892	24 November 1967
Horace S. Crook	12 May 1894	8 June 1975
J. E. Crook	27 April 1882	11 October 1893
James Festus Crook	13 February 1858	23 September 1923
James Henry Fitzgerald Crook	1 August 1887	21 July 1915
Josiah S. Crook	2 October 1847	18 April 1925
Sarah Ann <i>Keziah</i> Crook	20 April 1863	9 July 1924
Wilma Lucille Crook	13 November 1918	15 November 1918
Mamie Janette Helms	13 October 1899	7 March 1917
Lizzie Ann <i>Crook</i> Keziah	15 February 1880	16 May 1927
William Pinkney Keziah	5 August 1877	8 September 1945
Violet Smith	18 September 1915	11 March 1917
Sarah Ann <i>Keziah</i> Starnes Johnston	1833	Unknown

Neither Cemetery Census nor Interment.net have database entries for the Crook Cemetery. The Cemetery Survey Reports compiled by the Works Progress Administration (WPA) in the 1930s are available through the North Carolina State Archives digital collections. The Crook Cemetery was

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<sup>1</sup> Italicized names in this table and throughout the report indicate a woman's maiden name.

recorded by Oscar Lee Hemby as part of this survey, the details of which are given in Table 2.2 (Hemby 1938).

Table 2.2: Names of individuals buried in the Crook Cemetery recorded as part of the WPA Union County Cemetery Survey.

<b>Name</b>	<b>Birth Date</b>	<b>Death Date</b>	<b>Remarks</b>
Isaac Bernard Belk	22 December 1911	15 December 1913	Son of J. F. & Sallie Belk
C. E. Crook	2 February 1873	20 August 1889	
Eliza J. Crook	Unknown	16 April 1899	Age 85 years
J. E. Crook	27 April 1887	11 October 1898	Son of J. S. & Emaline Crook

The Dickerson Genealogy & Local History Room of the Union County Library contains a number of resources regarding cemeteries in Union County, which include listings for the Crook Cemetery. Compiled by Clara Laney and published in 1958, the *Union County Cemeteries, 1710–1914 and Roster of Confederate and Revolutionary Soldiers* includes the same names and details as those in the WPA Union County Cemetery Survey (Laney 1958). Laney noted that the cemetery was on the land of Horace Crook. In 1992, Otha B. Small compiled the *Union County, North Carolina Family Cemeteries* booklet, which also includes the same names and details regarding the Crook Cemetery from the WPA’s survey of the cemetery in 1938 (Small 1992). It is likely that both Laney and Small compiled records based upon the WPA survey.

Other sources of information consulted during this investigation included maps and plats, deeds, marriage bonds, U.S. Census data, birth and death certificates, the North Carolina Schedule of Mortality, and newspapers.

## 3.0 RESULTS OF RESEARCH

### 3.1 Cemetery Description

The Crook Cemetery is an example of a rural family cemetery containing folk burials from the nineteenth and twentieth centuries (Figures 3.1–3.15). While the exact number of graves within the Crook Cemetery is not known for certain, extant gravemarkers suggest approximately 24 burials, 13 with inscribed markers and 11 with uninscribed markers.

The cemetery occupies the southwest corner of a 5.5-acre agricultural field. It has a circular shape encompassed by a boundary of a single metal chain supported by metal posts. Pea gravel covers the ground of the cemetery, with some grass coming through. A large holly tree occupies the north section of the cemetery and shelters several gravemarkers. The cemetery features a variety of gravemarkers, including tab in socket, die-on-base, tablets, and lawn style, all of either marble, granite, or slate. In addition to the inscribed markers listed in Table 3.1, there are 11 uninscribed slate markers.

Table 3.1: The names and inscriptions found on the gravemarkers within the Crook Cemetery.

Name	Inscription	Material	Type
Mamie J. Helms	MAMIE J./Daughter of/N.B. & L.J. Helms/Oct. 13.1889,/Mar. 7, 1917./At rest	Marble	Tab in socket
Horace S. Crook and Hattie Horne Crook	CROOK HORACE S./MAY 12, 1894/JUNE 8, 1975 HATTIE HORNE/NOV. 2, 1892/NOV. 24, 1967	Granite	Die-on-base
Isaac Bernard	ISAAC BERNARD/Son of/J.F. & [?] Belk/Dec [?], 1911./Dec. [?] 1913./At rest.	Marble	Diamond in socket
William P. Keziah and Lizzie Ann Crook	WILLIAM P. KEZIAH/AUG. 5, 1877–SEPT. 8, 1945/HIS WIFE/LIZZIE ANN CROOK/FEB. 15, 1880–MAY 16, 1927  Associated footstone inscribed with “W.P.K.”	Granite	Die-on-base
Josiah Crook and Harriett E. Crook	FATHER/Josiah Crook/Oct 2 1847/Apr 18 1925 MOTHER/Harriet E./Wife of/Josiah Crook/July 23, 1850/Dec. 20, 1914/Member of Primitive/Baptist church	Granite	Double die-on-base
J. E. Crook	IN MEMORY/OF/J.E. CROOK SON/OF J.S. & EMALINE/CROOK. WAS BORND/APRIL 27 1882/DIED OCT [?] 1883/AGE [?] YEARS/[?] MO [?] DAYS	Slate	
C. E. Crook	DEATH/OF/C.E. Crook/DIED AUGUST THE/20 1889. WAS BORND FEB THE 25 1873.	Slate	
Eliza J. Crook	♥ /IN MEMORY OF/ELIZA. J. CROOK/WAS 85 YEARS OLD/DIED APRIL/THE 16 1899/A MEMBER OF THE PRIMITIVE B.C. 22Y.	Slate	

Name	Inscription	Material	Type
Violet Smith	VIOLET/Dau. of/C.T. & A.A./Smith./Sept. 18. 1915/Mar. 11, 1917/At rest.	Marble	Tablet
Baucom	[?] BAUCOM/AUG. 2[?]/JAN. 16. 1918/We will meet/again.	Marble	Tab in socket
Wilma Lucille Crook	WILMA LUCILLE/DAU. OF/HORACE & HATTIE/CROOK/NOV. 13, 1918–NOV. 15, 1918	Granite	Lawn style
Sarah Ann Crook	SARAH ANN/Wife of/James Crook/Apr. 20, 1863/July 9, 1924  Associated footstone inscribed with “S.A.C.”	Marble	Tab in socket
James Crook	JAMES CROOK/Feb. 15, 1858,/Sept. 23, 1923.	Marble	Tab in socket



Figure 3.1: Overview of the Crook Cemetery, looking north.

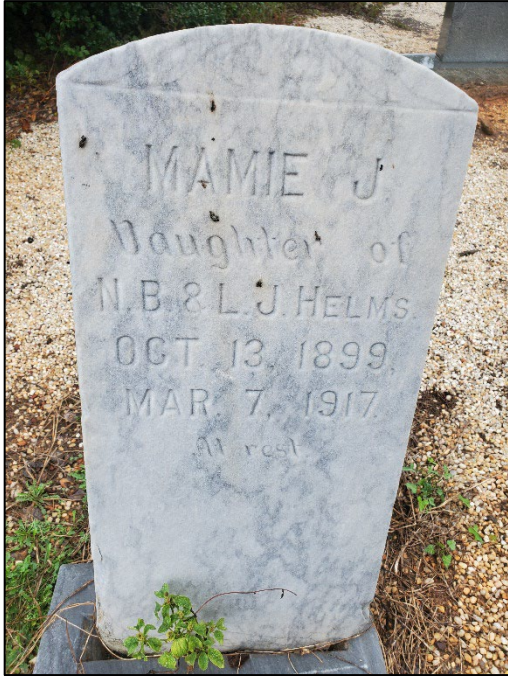


Figure 3.2 : Gravemarker for Mamie J. Helms.



Figure 3.3: Gravemarker for Isaac Bernard Belk.



Figure 3.4 : Gravemarker for William P. Keziah and Lizzie Ann Crook.



Figure 3.5: Gravemarker for Josiah Crook and Harriet E. Crook



Figure 3.6: Gravemarker for J. E. Crook.



Figure 3.7: Gravemarker for C. E. Crook.



Figure 3.8: Gravemarker for Eliza J. Crook.



Figure 3.9: Gravemarker for Violet Smith.



Figure 3.10: Gravemarker for Baucom.



Figure 3.11: Gravemarker for Sarah Ann Crook.

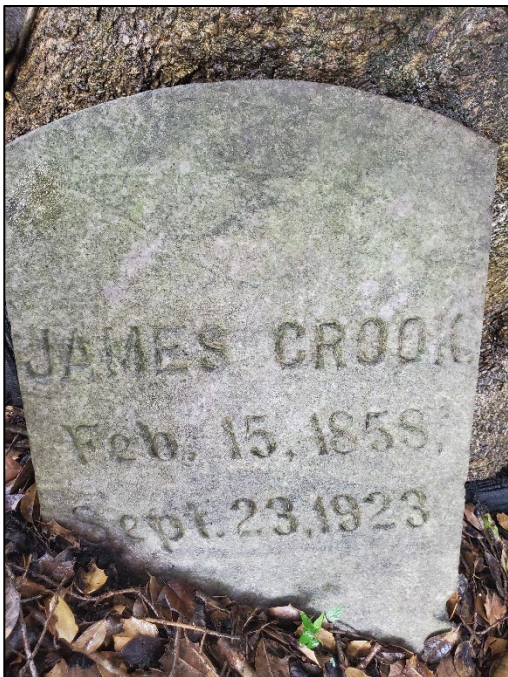


Figure 3.12: Gravemarker for James Crook.



Figure 3.13: Example of uninscribed slate gravemarkers.



Figure 3.14: Gravemarker for Horace and Hattie Crook.



Figure 3.15: Gravemarker for Wilma Lucille Crook.

## 3.2 The Crook Family

### 3.2.1 *The Formation of Union County*

Union County was formed in 1842 from portions of Anson and Mecklenburg counties (Corbitt 1987:120). Several of the individuals discussed in the following paragraphs were born before the county's establishment, complicating the research process by necessitating investigations into the records of multiple counties. A fire at the Anson County Courthouse in 1868 further complicates the research process as many records were destroyed, including valuable land and probate records.

### 3.2.2 *First Generation*

#### Victor Crook and Eliza Jane Medlin

Eliza Jane Medlin, one of the matriarchs of the Crook family, married Victor Crook on August 24, 1846 (North Carolina State Archives [NCSA] 1846). Eliza Jane Medlin's birth year and parentage is uncertain based on available research. When comparing census records and the age provided on her gravemarker, her birth year ranges between 1814 and 1829. Eliza's age was reported consistently as 25, 35, and 46 in the 1850, 1860, and 1870 censuses; however, the 1880 census listed her age as 50 and her gravemarker indicates that she was 85 years old at the time of her death in 1899 (United States Census Bureau [U.S. Census] 1850, 1860, 1870, 1880). As for her parentage, unsourced family trees available on the internet state Eliza's parents were John Drury Medlin II (1790–1870) and Unity DeBerry (1795–1871).<sup>2</sup> Based on available research at this time, it could not be determined for certain who Eliza's parents were.

Likewise, Victor Crook's birth date and parentage are also a mystery. Census records and two of his children's death certificates provide a birthplace of New York, while oral history and one of his children's death certificate states he was born in Ireland (Crook 2016; NCSA 1916, 1925a, 1941; U.S.

<sup>2</sup> Another common spelling of Medlin is Medlen.

Census 1850, 1860). Victor Crook was likely born between 1788 and 1799 (U.S. Census 1850, 1860). There are several military records for a man by the name of Victor Crook. Victor Crook served as a private in the 80th Regiment of the New York Militia during the War of 1812; however, only a card in the service record index exists and it is unclear if this is the subject Victor Crook (National Archives and Records Administration [NARA] 1812).<sup>3</sup> Additional military records for a man named Victor Crook from New York appear after 1820 but are not likely to be the subject Victor Crook since he had moved to Mecklenburg County by 1820 (*The Monroe Journal*, 16 May 1916:5; *Western Carolinian*, 22 January 1822:3). In fact, Victor Crook first appears in local newspapers in 1822, and his daughter's obituary states that he moved down from New York in 1820. The reason for his relocation to North Carolina is unknown.

In 1840, Victor Crook and his family lived in Mecklenburg County (U.S. Census 1840).<sup>4</sup> It is likely that he had married his first wife, Nancy Medlin, sometime in the 1820s, though no record of the marriage survives (Union County Register of Deeds [UCRD] 1845, Deeds, 2:421).<sup>5</sup> According to the 1840 census, the household consisted of two males under the age of five, one male between the ages of five and 10, one male between 50 and 60 (likely Victor Crook), two females under five, one female between 10 and 15, and one female between 40 and 50 (likely Nancy Medlin) (U.S. Census 1840).

In 1845, Victor Crook and Nancy *Medlin* Crook appear in Union County deed books conveying their claim to the lands of the estate of the deceased John Medlin, Nancy's father, to John Medlin, Nancy's brother, for \$19 (Union County Register of Deeds [UCRD] 1845, Deeds, 2:421). Victor Crook sold additional land in March 1850 to John McCollum, which included the land on which the Crook family resided (UCRD 1850, Deeds, 1:637). According to the land description, it included "both his plantations adjoining the plantation or improvements of Milas Medlin...together with the growing crop of wheat & oats" (UCRD 1850, Deed, 1:637). Victor Crook appears to only sell land during this period, suggesting he may have fallen upon hard times and needed to sell his property.

The land on which the Crook Cemetery lies can be traced back to Josiah Crook, who sold the land to Horace Crook in 1921 (UCRD 1921, Deed, 58:589). It is plausible that Victor Crook passed the subject property to his eldest son through his second marriage.

Nancy Medlin died between October 1845 and August 1846 (NCSA 1846; UCRD 1845, Deeds, 2:421). Her burial location is not known for certain. Victor Crook married shortly after Nancy's death to Eliza Jane Medlin. Eliza Jane Medlin is believed to be the niece of Nancy Medlin, with Eliza's father being Nancy's brother, John Drury Medlin II.

In 1850, the Crook family lived in Union County, next to Eliza's parents, John Drury Medlin and Unity DeBerry Medlin (U.S. Census 1850). Victor worked as a farmer and owned real estate valued at

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<sup>3</sup> No pension could be found for Victor Crook in the War of 1812 pension files available at Fold3.

<sup>4</sup> Union County was formed from portions of Mecklenburg and Anson counties in 1842. No record of Victor Crook was found in the 1830 census in Mecklenburg or Anson counties.

<sup>5</sup> No marriage record for Victor Crook and Nancy Medlin could be found. It is possible that it was destroyed in a fire in the Anson County Courthouse in 1868. Nancy Medlin was likely the daughter of John Drury Medlin (1769–1840) and Fereby Whitley (1769–1857).

\$400 (U.S. Census 1850).<sup>6</sup> Though the 1850 census does not provide relationships of individuals to the head of household, it is likely that Josiah was the eldest son born to Victor Crook and Eliza Jane Medlin, while the other children living in the household were from Victor’s first marriage to Nancy (Table 3.2).

Table 3.2: The Victor Crook household in 1850 (U.S. Census 1850).

<b>Name</b>	<b>Age</b>	<b>Occupation</b>
Victor Crook	50	Farmer
Eliza Crook	25	
Mary Crook	15	
Phebe Crook	13	
Abraham Crook	10	
Jemimah Crook	7	
Samuel Crook	6	
Rachael Crook	5	
Josiah Crook	2	

The family continued to reside in Union County in 1860 (U.S. Census 1860). Victor Crook’s real estate value dropped to just \$200, and he labored as a “mower and ditcher,” though the household expanded significantly and seems to include several children from Victor’s first marriage, as well as those from his second, and several extended family members, namely the children of the unmarried Phebe Crook (Table 3.2; U.S. Census 1860).<sup>7</sup>

Table 3.3: The Victor Crook household in 1860 (U.S. Census 1860).

<b>Name</b>	<b>Age</b>	<b>Occupation</b>
Victor Crook	72	Mower and Ditcher
Eliza Crook	35	Domestic
Phebe Crook	23	Domestic
Elmira Crook	19	Domestic
Patsey Crook	18	Domestic
Abram Crook	16	Day laborer
Mary Crook	15	Domestic
Joseph [Josiah] Crook	12	
Zachariah Crook	7	
John Crook	4	
Dulcena Crook	4	
Robert Crook	3	
Abel Crook	2	

<sup>6</sup> For reference, John Drury Medlin II owned real estate valued at \$4,000, a significant sum compared to others living nearby.

<sup>7</sup> Phebe is an older spelling variation of the name Phoebe. For the sake of consistency with the written record, the older spelling is utilized throughout the report.

John A. Crook	1	
Absalom Crook	6 months	
Phenix Crosby	18	Day laborer

Victor Crook died between 1865, the last time he appears in the written record, and 1870, when Eliza Jane Medlin was listed as the head of the household (NCSA 1865; U.S. Census 1870). His burial location is unknown, and he does not appear in probate records. If he held no real estate and a small personal estate at the time of his death, it is not surprising that he does not show up in this record type.

The widowed Eliza Jane *Medlin* Crook found herself as the head of a large household, and she may have been the recipient of her husband's small personal estate, which was valued at \$375 (Table 3.3; U.S. Census 1870). Other Crook heads of household in the area where Eliza Jane *Medlin* Crook lived were Abraham Crook and Patsey Crook, both of whom were her stepchildren (U.S. Census 1870).

Table 3.4: The Eliza Jane *Medlin* Crook household in 1870 (U.S. Census 1870).

Name	Age	Occupation
Eliza Crook	46	Keeping house
Sarah Crook	34	At home
Josiah Crook	22	Farmer
Rachel Crook	24	At home
Ellen Crook	17	At home
William Crook	16	Works on farm
James Crook	12	Works on farm
Sarah Crook	11	At home
Thomas Crook	9	At home
William Crook	5	At home

Eliza remained the head of the household in 1880 (U.S. Census 1880). Notably, the 1880 census is the first to include relationships of individuals to the head of the household (Table 3.4). By this time, Eliza's stepchildren had moved out of the house and only one extended family member, her nephew, Thomas Crook, resided with the family.

Table 3.5: The Eliza Jane *Medlin* Crook household in 1880 (U.S. Census 1880).

Name	Age	Relationship	Occupation
Eliza Crook	50		Keeping house
James Crook	21	Son	Farmer
Leroy Crook	18	Son	Works on farm
Thomas Crook	17	Nephew	Works on farm

Williford Crook	13	Son	Works on farm
Rachel Crook	30	Daughter	At home
Ellen Crook	23	Daughter	At home

It is not known when Eliza Jane *Medlin* Crook died. In the Crook Cemetery, there is a gravemarker for Eliza J. Crook who died on 16 April 1899; however, it is not known for certain whether this was the Eliza J. Crook who was the wife of Victor Crook or if it is the wife of Abraham Crook, Victor Crook's son with his first wife. The gravemarker states that Eliza J. Crook, buried in the cemetery, was 85 years old. An obituary for "Mrs. Eliza Jane Crook, wife of Mr. A Crook, of west Monroe township," appears in the newspapers providing a death date of 16 April 1899 (*The Morning Star*, 30 April 1899:2). This obituary confirms that the gravemarker thought to be that of Eliza Jane *Medlin* Crook, according to Find a Grave, is actually that of Abraham Crook's wife. Both the death date and the burial location of Eliza Jane *Medlin* Crook are unknown (Find a Grave 2008a).

#### *Children of Victor Crook and Eliza Jane Medlin*

Victor Crook and Eliza Jane Medlin had at least six children that survived into adulthood:

- 1) **Josiah Crook** was born on 2 October 1847 in Union County, North Carolina and died on 18 April 1925 in Monroe, Union County, North Carolina (Crook Cemetery 1925; NCSA 1925a). He married Harriett Emmaline Gurley in 1876 (U.S. Census 1900a). Both Josiah and Harriett are buried in the Crook Cemetery.
- 2) **Ellen Crook** was born between 1851 and 1857 in Union County, North Carolina and died on 11 January 1941 in Monroe, Union County, North Carolina (NCSA 1941). She first married a man with the surname Russ, and then married Thomas A. Price on 12 January 1922 (NCSA 1922). Research did not uncover any known biological children. Ellen is buried in the Crook Cemetery, likely marked by an uninscribed marker (*The Charlotte Observer*, 12 January 1941:10).
- 3) **James Crook** was in October 1859 in Union County, North Carolina and died on 23 September 1923 in Monroe, Union County, North Carolina (NCSA 1923). He married Sarah A. Keziah on 9 September 1880 in Union County, North Carolina (NCSA 1880). Both James and Sarah are buried in the Crook Cemetery.
- 4) **William Cull Crook** was born on 10 August 1858 in Union County, North Carolina and died on 1 March 1934 in Buford Township, Union County, North Carolina (NCSA 1934). He first married Angeline T. Fowler on 12 January 1879 in Union County, North Carolina (NCSA 1879). After Angeline's death around 1899, he married Lula Secrest (U.S. Census 1900a). Both William and Lula are buried in Altan Presbyterian Church Cemetery in Alton, Union County, North Carolina (Find a Grave 2007).
- 5) **Leroy Crook** was born 13 May 1862 in Union County, North Carolina and died on 10 June 1926 in Monroe, Union County, North Carolina (Find a Grave 2010a; NCSA 1926). He married Letitia Fowler on 18 May 1882 in Union County, North Carolina (NCSA 1882). Both

Leroy and Letitia are buried in Shiloh Baptist Church Cemetery in Monroe, Union County, North Carolina (Find a Grave 2010a).

- 6) **Willeford Crook** was born on 19 February 1866 in Union County, North Carolina and died on 16 July 1938 (NCSA 1938). He married Melissie Adeline Ross on 3 November 1887 in Union County, North Carolina (NCSA 1887). Both Willeford and Melissie are buried in Shiloh Baptist Church Cemetery in Monroe, Union County, North Carolina (Find a Grave 2008b).

### 3.2.3 Second Generation

#### Josiah Crook and Harriett Gurley

Josiah Crook, the eldest son of Victor Crook and Eliza Jane Medlin, was born on 2 October 1847 in Union County, North Carolina (Crook Cemetery 1925). He lived and worked his entire life as a farmer in Union County. He married Harriett Emmaline Gurley in 1876 (U.S. Census 1900a). In 1880, he was the head of his own household (U.S. Census 1880). Notably, neither Josiah nor Harriett could read or write. At the time of the 1880 census, neighbors of the Crooks included Abraham Crook, Henry W. Funderburk, Simon Mullis, Thetis C. Price, and Lewis Knotts (U.S. Census 1880).

The 1900 census is the first census to indicate whether a head of household owned or rented their home, whether it was owned outright or mortgaged, and if the property was a farm or a house. Josiah Crook and his family lived on a farm they owned outright, with the Crook sons working as farm laborers (U.S. Census 1900a). The family continued to live this way until Josiah Crook's death in 1925 (U.S. Census 1910, 1920).

Josiah Crook died on 18 April 1925 in Union County. An inventory of his personal belongings included in his probate file indicates that the Crooks were middle- or lower-middle-class farmers (NCSA 1925b). Josiah Crook practiced diversified agriculture centered on cotton and corn. Josiah Crook was surrounded by a close family network, as evidenced by the number of Crook relatives who purchased items at the sale of his belongings.

Josiah Crook and Harriett Gurley had the following known children:

- 1) **Charles E. Crook** was born on 25 February 1873 and died on 20 August 1889 (Crook Cemetery 1889). He is buried in the Crook Cemetery.
- 2) **William Culpepper Crook** was born on 24 December 1875 and died on 3 January 1961 (Find a Grave 2008c). He married Elsie Helms on 4 August 1907 in Union County, North Carolina (NCSA 1907a). Both William and Elsie are buried in High Hill Primitive Baptist Church in Monroe, Union County, North Carolina (Find a Grave 2008c).
- 3) **Lillie Jane Crook** was born on 1 January 1876 in Union County, North Carolina and died on 16 June 1952 in Charlotte, Mecklenburg County, North Carolina (NCSA 1952). She married Needham Bartley Helms on 19 August 1893 in Union County, North Carolina (NCSA 1893). Lillie Jane Crook is buried in Mount Holly City Cemetery in Mount Holly, Gaston County, North Carolina (Find a Grave 2016).

Lillie Jane Crook and Needham Bartley Helms have one daughter buried in the Crook Cemetery. Mamie Janette Helms was born on 13 October 1899 in North Carolina, and she died on 7 March 1917 in Monroe, Union County, North Carolina (NCSA 1917a). Her death certificate and gravemarker in the Crook Cemetery confirms her burial location.

- 4) **Mary E. Crook** was born in November 1879 in Union County, North Carolina (U.S. Census 1880). It is possible she died between 1880 and 1900 as she does not appear in any additional census records and could not be located in marriage records.
- 5) **Lizzie Ann Crook** was born on 15 February 1880 in Union County, North Carolina and died on 16 May 1927 (Crook Cemetery 1927). She married William Pinkney Keziah on 4 August 1907 in Union County, North Carolina (NCSA 1907b). Both Lizzie and William are buried in the Crook Cemetery (Crook Cemetery 1927).

Lizzie and William had one daughter together, Martha Emma Keziah (NCSA 1989). Martha married John Wriston Thomas and they had two children together, Martha Elizabeth and Robert Fulton (U.S. Census 1940, 1950). Both Martha and John are buried in Lakeland Memorial Park in Monroe, Union County, North Carolina (Find a Grave 2011a).

- 6) **J. E. Crook** was born on 27 April 1882 in Union County, North Carolina and died in October 1883 (Crook Cemetery 1883). He is buried in the Crook Cemetery (Crook Cemetery 1883).
- 7) **Robert C. Crook** was born on 2 September 1885 in Union County, North Carolina and died on 20 March 1947 in Monroe, Union County, North Carolina (NCSA 1947). He married Ida Fowler on 31 January 1909 in Union County, North Carolina (NCSA 1909). Both Robert and Ida are buried in Grace United Methodist Church Cemetery in Monroe, Union County, North Carolina (Find a Grave 2008d).
- 8) **Sallie Crook** was born on 7 July 1887 in Union County, North Carolina and died on 2 October 1966 in Monroe, Union County, North Carolina (NCSA 1966). She married John Franklin Belk on 9 April 1911 in Union County, North Carolina (NCSA 1911). Both Sallie and John are buried in Suncrest Cemetery in Monroe, Union County, North Carolina (Find a Grave 2009a).

Sallie and John have at least one child buried in the Crook Cemetery, Isaac Bernard Belk, who was born on 22 December 1911 and died on 15 December 1913 (Crook Cemetery 1913; *The Monroe Journal*, 23 December 1913:9).

- 9) **Isaac Jacob Crook** was born on 16 November 1889 in Union County, North Carolina and died on 14 October 1955 (Find a Grave 2011b). He married Carrie Mullis on 6 February 1912 in Union County, North Carolina (NCSA 1912a). Both Isaac and Carrie are buried in Lakeland Memorial Park in Monroe, Union County, North Carolina (Find a Grave 2011b).
- 10) **John Alex Crook** was born on 1 June 1891 in Union County, North Carolina and died on 14 October 1955 (Find a Grave 2011c). He married Wilma Bass on 15 May 1913 in Union County, North Carolina (NCSA 1913a). Both John and Wilma are buried in Lakeland Memorial Park in Monroe, Union County, North Carolina (Find a Grave 2011c).

- 11) **Horace S. Crook** was born on 12 May 1892 in Union County, North Carolina and died on 8 June 1975 in Union County, North Carolina (NCSA 1975). He married Hattie Horne on 30 December 1914 (NCSA 1914). Both Horace and Hattie are buried in the Crook Cemetery (Crook Cemetery 1975).

#### James Crook and Sarah Ann Keziah

James Crook was the second oldest son of Victor Crook and Eliza Jane Medlin. James Crook's life largely mirrored that of his older brother Josiah Crook in that he lived his entire life in Monroe Township in Union County and labored as a farmer (U.S. Census 1870, 1880, 1900a, 1910, 1920). He married Sarah Ann Keziah on 9 September 1880 (NCSA 1880). Sarah was also a lifelong resident of Union County, who was born around 1863 to John Calvin Keziah and Martha Ann Tomberlin (NCSA 1924). James Crook died on 23 September 1923 and was buried in the "Crook Cemetery," according to his death certificate (NCSA 1923). Sarah Ann Keziah died less than a year later on 9 July 1924 and was interred at the Crook Cemetery (NCSA 1924).

James Crook and Sarah Keziah had the following known children:

- 1) **Della Crook** was born on 1 August 1880 in Union County, North Carolina and died on 27 December 1943 in Monroe, Union County North Carolina (NCSA 1943). She married John I. Long on 21 May 1913 in Mecklenburg County, North Carolina (NCSA 1913b). Both Della and John are buried at Suncrest Cemetery in Monroe, Union County, North Carolina (Find a Grave 2010b).
- 2) **John Calvin Crook** was born on either 2 or 6 September 1884 in Union County, North Carolina and died on 8 August 1963 in Monroe, Union County, North Carolina (Find a Grave 2009b; NCSA 1963). He married Blake Simpson on 15 December 1908 in Union County, North Carolina (NCSA 1908a). Both John and Blake are buried in Suncrest Cemetery, Monroe, Union County, North Carolina (Find a Grave 2009b).
- 3) **James Henry Fitzgerald Crook** was born on 1 August 1887 in Union County, North Carolina and died on 31 July 1915 in Monroe Township, Union County, North Carolina (NCSA 1915). He married Lillie (or Lelia) Mullis on 28 August 1912 in Union County, North Carolina (NCSA 1912b). James was buried in the Crook Cemetery, and his grave is likely marked by an uninscribed gravemarker (*The Monroe Journal*, 3 August 1915:5).
- 4) **Martha Odessa Crook** was born on 15 October 1893 in Union County, North Carolina and died on 7 October 1950 in Monroe, Union County, North Carolina (NCSA 1950). She married John F. Bass on 10 September 1920 in Union County, North Carolina (NCSA 1920). Both Martha and John are buried in Suncrest Cemetery in Monroe, Union County, North Carolina (Find a Grave 2008e).

#### *3.2.4 Third Generation*

##### Horace Crook and Hattie Horne

According to deed records, the property on which the Crook Cemetery lies was transferred from Josiah Crook to his son Horace Crook on 10 December 1921 (UCRD 1921, Deeds, 58:589). Horace Crook was the youngest of at least 11 children born to Josiah Crook and Harriett Gurley. Born on 12 May 1892, Horace Crook resided in the area his entire life and followed in his father's footsteps as a farmer (NCSA 1975). He married Hattie Horne on 30 December 1914 (NCSA 1914).<sup>8</sup> Horace and Hattie were part of Josiah Crook's household until Josiah's death in 1923 (U.S. Census 1920). The couple had one son named George Crook.

Hattie died on 24 November 1967 and was buried in the "Crook Family Cemetery" (NCSA 1967). Horace outlived his wife by eight years and passed away on 8 June 1975 (NCSA 1975). He is interred beside Hattie. This is the last known burial to occur in the Crook Cemetery.

### *3.2.5 Fourth Generation*

#### George Smith Crook and Ada Florine Clontz

Following his father's death in 1975, George Smith Crook took ownership of the property as the only heir of Horace Crook (UCRD 2015, Deeds, 6402:404). George Crook was born on 1 December 1920 (NARA 1941). On 7 July 1951, George married Ada Florine Clontz, daughter of Theron Clontz and Ona L. Little (NCSA 1951).<sup>9</sup> Like George, Ada was born and raised in a farming family in Union County. George and Ada occupied the subject property on which the Crook Cemetery lies during their married years. George died on 19 April 1998 and was buried in Crooked Creek Primitive Baptist Church Cemetery in Union County (Find a Grave 2011d). The property was placed into a family trust following the death of George and remained in the family trust until Ada's death in 2015 (UCRD 2015, Deeds, 6402:404; Find a Grave 2021).

### *3.2.6 Recent History*

In 2017, the subject property, including the cemetery, was transferred from the Florine C. Crook Trust to the daughters of George and Ada Crook: Marie Crook Bossert, Martha Crook Hauser, and Vera Crook Shanley (UCRD 2017, Deeds, 6930:336). The sisters placed the property in an LLC under the name MVM Crook Properties in May 2017, and sold the property to the current property owners, Geetha Vallabhaneni and Srinivas Kollipara, on 13 October 2021 (UCRD 2017, Deeds, 6930:340; UCRD 2021, Deeds, 8281:837). The property is currently vacant.

### *3.2.7 Other Known Burials at the Crook Cemetery*

#### Violet Smith

Violet Smith was the daughter of Thomas Charles Smith and Lela A. Horne. She was born on 18 September 1915 in Monroe, Union County, North Carolina and died on 11 March 1917 in the same place (NCSA 1917b). Lela A. Horne was the older sister of Hattie Horne (U.S. Census 1900b).

#### Baucom

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<sup>8</sup> Another common spelling of the surname Horne is Horn.

<sup>9</sup> Ada Florine Clontz primarily went by her middle name of Florine.

The gravemarker with the surname Baucom is likely that of Minnie Viola Baucom, who was born on 2 August 1903 in Matthews, Mecklenburg County, North Carolina, and died on 16 January 1908 in Monroe, Union County, North Carolina (NCSA 1908b).<sup>10</sup> She was the daughter of J. D. Baucom and Mary Rheams. Both her death certificate and her gravemarker confirm her burial location the Crook Cemetery. No immediate familial connection to the Crook family could be determined based on available research at this time.

### 3.3 National Register of Historic Places Evaluation

#### *National Register Evaluation*

The National Register Criteria for Evaluation are the guidelines by which properties are assessed for the National Register of Historic Places (NRHP). Criteria used in the evaluation process are specified in the Code of Federal Regulations, Title 36, Part 60, National Register of Historic Places (36 CFR 60.4). Historic properties may include districts, structures, objects, or sites that are at least 50 years of age and meet at least one of the National Register criteria. Cemeteries are in a small category of properties that are not usually considered for listing in the NRHP unless they meet a special requirement, Criteria Consideration D for Cemeteries, in addition to meeting at least one of the regular Criteria (A–D below). To be eligible for inclusion in the NRHP, a historic property, or cemetery, must possess significance in American history, architecture, archaeology, or culture, and:

- (A) be associated with events that have made a significant contribution to the broad patterns of our history, or
- (B) be associated with the lives of persons significant in our past, or
- (C) embody the distinct characteristics of a type, period, or method of construction, or that represent the work of a master, or that possess high artistic values, or that represent a significant and distinguishable entity whose components lack individual distinction, or
- (D) yielded, or may be likely to yield, information important in pre-history or history (36 CFR 60.4).

The Crook Cemetery was not found to be associated with locally significant historical events or trends. The cemetery is an example of a family burial ground, a type of cultural resource that is found throughout North Carolina. Therefore, the Crook Cemetery is recommended not eligible for listing in the NRHP under Criterion A.

The identified individuals buried in the Crook Cemetery were not demonstrated to be of transcendent importance to the local, state, or national community. Therefore, the Crook Cemetery is recommended not eligible for listing in the NRHP under Criterion B.

The extant gravemarkers within the Crook Cemetery are not distinctive examples of funerary art or craftsmanship. As an entity, the Crook Cemetery does not possess the requisite “distinctive design values” to be eligible for the NRHP. Therefore, the Crook Cemetery is recommended not eligible for the NRHP under Criterion C.

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<sup>10</sup> Minnie is also spelled Miney.

It is unlikely that additional study of the Crook Cemetery would yield any unretrieved data related to history or prehistory not discoverable through informant interviews and documentary sources. Therefore, the Crook Cemetery is recommended not eligible for the NRHP under Criterion D.

## 4.0 PROPOSED RELOCATION OF THE CROOK CEMETERY

The property owners, Ms. Vallabhaneni and Mr. Kollipara, are marketing for sale the subject parcel on the east side of Secrest Short Cut Road (PIN 09216076C). The purpose of this grave relocation request is to accommodate future development of the parcel and to provide better protection of the remains by relocating them to a cemetery with perpetual care. The property owners will bear expenses associated with the disinterment and reinterment of the graves. The three most common planning options for graves in the path of development are: 1) preservation in place; 2) relocation on site; and 3) relocation off site to another cemetery.

There are no development plans for the parcel at this time; however, the property owners would like to market the property for future development purposes. For this reason, the preservation of the Crook Cemetery in place is not an option (Option 1), nor is it feasible to relocate the cemetery on site (Option 2). Relocation of the Crook Cemetery graves to Suncrest Cemetery in Monroe is the preferred option (Option 3). Suncrest Cemetery provides perpetual care so the graves will be maintained in perpetuity. To date, 10 next-of-kin have come forward, with one descendant expressing opposition to the relocation.

### 4.1 Summary of Due Diligence Efforts

It can be challenging to identify the individuals buried in abandoned family cemeteries, particularly when these cemeteries contain damaged and neglected gravemarkers, uninscribed gravemarkers, and unmarked graves; such is the case with the Crook Cemetery. In addition, property records can identify historic property owners who may be associated with the cemetery; however, it is important to note that rural cemeteries in the South may contain the remains of enslaved persons, tenant farmers, or sharecroppers who occupied the land but did not own it. While the remains of all the individuals interred at the Crook Cemetery are likely members of the Crook family, it is possible that others are buried within the cemetery.

To identify the descendants of those interred at the Crook Cemetery, a legal advertisement was placed in *The Enquirer Journal* on October 11, 18, and 25 and November 1, 2025 (Appendix B). This notification was placed to comply with NC GS 65-106 (b) and to identify next-of-kin of the interred and persons with interest in or knowledge about the graves contained within the Crook Cemetery. No responses to the legal advertisement were received.

Potential descendants of Eliza Jane Medlin were identified through searches on Ancestry.com and obituaries through Newspapers.com. Internet Google searches and property records were used to obtain descendant addresses. Letters describing the location of the cemetery and its proposed relocation were sent to 133 descendants on November 3, 2025, as required by NC GS 65-106 (b) (Tables 4.1). To date, nine responses have been received as a result of the mailing, and their responses are recorded below in Table 4.1. One response, from Dolly Clay Nichols, was received via phone stating that her mother, Dolly Loise Crook, buried a two-year-old son named Ronald Simpson in the Crook Cemetery around 1955.

Table 4.1: Descendants of Victor Crook and Eliza Medlin.

Name	Relationship	Notes
Sue Helms Rhodes	2x great-granddaughter	
Gilbert H. Helms	3x great-grandson	
Sandra Helms McPherson	2x great-granddaughter	Mail undeliverable.
Danita G. Helms	2x great-granddaughter	
Millias D. Helms	3x great-grandson	
Norman C. Helms	2x great-grandson	
Kenneth W. Helms	2x great-grandson	Requested a copy of the genealogical research, which was sent via mail.
Ronnie E. Hinson	3x great-grandson	
Karen Uzzell Anderson	2x great-granddaughter	
Elizabeth Crook Hunter	3x great-granddaughter	
Charles D. Crook	2x great-grandson	
Brandon N. Rowell	3x great-grandson	
Rhonda Crook Griffin	2x great-granddaughter	
Ricky Privette	3x great-grandson	
Tammy Privette Boone	3x great-granddaughter	
John D. Edmonson	2x great-grandson	
Jerry W. Edmonson	2x great-grandson	
Joshua W. Edmonson	3x great-grandson	
Frances Yarbrough Caldwell	2x great-granddaughter	
Nathan Caldwell	3x great-grandson	
William E. Fogle	2x great-grandson	
Robert C. Crook	2x great-grandson	
Victor B. Plyler	2x great-grandson	
Milburn B. Plyler	2x great-grandson	
Beth Plyler Clontz	2x great-granddaughter	
Malcom D. Black	2x great-grandson	
Carl J. Crook	2x great-grandson	
Ronald L. Crook	2x great-grandson	Received call from POA, Eddy Ivester. Ronald has no opposition to the relocation.
Tessa Ann Crook	2x great-granddaughter	
Jerry W. Crook	2x great-grandson	
John S. Crook	2x great-grandson	
Beverly Phillips Austin	2x great-granddaughter	
Wanda Phillips Hinson	2x great-granddaughter	
Christina Austin McDermott	2x great-granddaughter	Mail undeliverable.
Sarah Crook Gerlach	Great-granddaughter	
Randy V. Watts	2x great-grandson	

<b>Name</b>	<b>Relationship</b>	<b>Notes</b>
Charles R. Watts	2x great-grandson	
Brenda Watts Ledford	2x great-granddaughter	
Roxanne Watts Fenchel	2x great-granddaughter	
James A. Haire	2x great-grandson	
Charles E. Haire	2x great-grandson	
Donald C. Stevens	2x great-grandson	
Patricia Stevens McManus	2x great-granddaughter	
Sundra Cook Hilton	2x great-granddaughter	
Van W. Crook	Great-grandson	
Frances Crook Robinson	Great-granddaughter	
Thomas R. Vickery	2x great-grandson	
Wanda Vickery Little	2x great-granddaughter	
Danny C. West	2x great-grandson	
Darrell L. Crook	2x great-grandson	
Karen Riggins Keller	2x great-granddaughter	
Richard A. Broome	2x great-grandson	
Mark D. Broome	2x great-grandson	
Marty S. Broome	2x great-grandson	
Susan Crook Stegall	2x great-granddaughter	
Michael R. Crook	2x great-grandson	
Lori Crook Brasington	2x great-granddaughter	
Cindy Crook Lyles	2x great-granddaughter	
Eddie L. Anderson	2x great-grandson	
Donald H. Crook	2x great-grandson	
Thomas C. Crook	2x great-grandson	
Brian W. Crook	2x great-grandson	
Robert M. Rape	2x great-grandson	
Sondra Rape Purser	2x great-granddaughter	
Wendy Rape Phillips	2x great-granddaughter	
Amy Rape Scott	2x great-granddaughter	
Russell L. Floyd	2x great-grandson	
Lisa D. Helms	2x great-granddaughter	
Mary D. Crook	2x great-granddaughter	
Mitchell C. Crook	Great-grandson	
Christopher W. Crook	2x great-grandson	Spoke with Christopher's first cousin, William Crook. William asked to be notified of the public meeting date and is opposed to the relocation.
Anita Tyson Whittle	3x great-granddaughter	
Amy Tyson Hill	3x great-granddaughter	
Charles K. Tyson	2x great-grandson	

<b>Name</b>	<b>Relationship</b>	<b>Notes</b>
Tamara Helms Turner	3x great-granddaughter	
Chase K. Tyson	3x great-grandson	
Dollie Clay Nichols	2x great-granddaughter	
Ellie Alexander Campbell	2x great-granddaughter	
Justin S. Nash	3x great-grandson	
James R. Crooke	2x great-grandson	
Wriston D. Crooke	2x great-grandson	
Kathryn Crooke Norman	2x great-granddaughter	
Kyle Lovelace	3x great-grandson	
Barbara Crooke Huffman	3x great-granddaughter	Patricia Conder Jordan called on her behalf. No opposition to relocation.
Patricia Conder Jordan	2x great-granddaughter	No opposition to relocation.
James D. Crook	2x great-granddaughter	
Billy F. Aycoth	2x great-grandson	
Tony Crooke	3x great-grandson	
Perry M. Crooke	2x great-grandson	
Myra Crook Billingsley	2x great-granddaughter	
Norman A. Crook	2x great-grandson	
Teresa Crook Byrum	2x great-granddaughter	
Michael E. Crook	2x great-grandson	
Vickie Gordon Helms	2x great-granddaughter	
Dale Gordon	2x great-grandson	
Wendy Helms Meadows	4x great-granddaughter	
Rodney Helms	4x great-grandson	
Paul A. Burr	4x great-grandson	
Lisa Tarlton Stokes	4x great-granddaughter	
Marion Waddell Minasian	3x great-granddaughter	
James R. Waddell	3x great-grandson	Asked to be kept informed of the process.
Daniel G. Waddell	3x great-grandson	
Joe B. Baucom	4x great-grandson	
Brian C. Baucom	4x great-grandson	
Randy R. Link	3x great-grandson	
Jada Dyson Wright	3x great-granddaughter	No opposition to relocation but requested to be kept informed of the process.
Carl R. Haigler	3x great-grandson	
Ronald D. Crook	3x great-grandson	
Phillip P.	3x great-grandson	
Brenda Crook Carnes	2x great-granddaughter	
Kelly Corcoran Hinson	3x great-granddaughter	

Name	Relationship	Notes
Larry W. Belk	2x great-grandson	
Aaron L. Haigler	3x great-grandson	
Randy B. Belk	2x great-grandson	
Jimmy L. Bovender	3x great-grandson	
Amy Bovender Williams	3x great-granddaughter	
John H. Stegall	2x great-grandson	
Michael E. Stegall	2x great-grandson	
Johnette Gordon Preddy	3x great-granddaughter	
Susan Gordon Lee	3x great-granddaughter	
Lenora Gordon Barnhardt	3x great-granddaughter	
Freddie B. Gordon	2x great-grandson	
Linda Gordon Sims	2x great-granddaughter	
Gretta Secrest	3x great-granddaughter	Requested that any gravemarkers not moved to Suncrest Cemetery be given to her.
Vera Crook Shanley	2x great-granddaughter	
Robin Price Waller	3x great-granddaughter	
Jerry L. Price	3x great-grandson	
Teresa Price	3x great-granddaughter	
Dana Collins Bundick	3x great-granddaughter	
James W. Bass	2x great-grandson	
Joyce Bass Hinson	2x great-granddaughter	
James H. Bass	2x great-grandson	John H. Bass is deceased, and the letter was received by his nephew, John W. Bass Jr. He has no opposition to the relocation.
John T. Helms	3x great-grandson	
Dolly Clay Nichols	Unknown	She stated that her mother, Dolly Louise Crook, buried her two-year-old son, Ronald Simpson, in the Crook Cemetery around 1955 in an unmarked grave. She has no opposition to the relocation as long as it is done respectfully.

#### 4.2 Proposed Reinterment Location

Suncrest Cemetery is the proposed site for reinterment of the Crook Cemetery. Suncrest Cemetery is located at the intersection of Bickett Street and Johnson Street (PIN 09235097) in Monroe. As required by state law, the removal and reinterment of the graves shall be performed by a funeral director licensed by the State of North Carolina (see Appendix A). The removal and reinterment of the graves will be scheduled so that the Union County Public Health Department staff will observe

the removal of the remains. The funeral director or their designee will file a disinterment/reinterment form with the Union County Register of Deeds after the work is completed. The property owners will reinstall gravemarkers from the Crook Cemetery in Suncrest Cemetery where possible, and a group gravemarker will be placed at the reinterment site for the unidentified remains and gravemarkers without inscriptions, as required by state law.

## 5.0 SUMMARY

This technical report was prepared by RGA on behalf of the property owners Geetha Vallabhaneni and Srinivas Kollipara. The property owners are in the process of marketing the subject property (PIN 09216076C) for future development. This report provides supporting documentation for the Monroe City Council to consider this request to relocate the graves within the Crook Cemetery to Suncrest Cemetery in Monroe, Union County, North Carolina, as allowed by North Carolina General Statute 65-106 Removal of Graves.

This report summarizes the historical background research conducted at the Crook Cemetery, and documents efforts to identify next-of-kin. The Crook Cemetery is estimated to contain at least 24 burials. The identities of individuals interred in graves with uninscribed gravemarkers and unmarked graves remain unknown. Based on historical background research, it is plausible that the cemetery contains the remains of other members of the Crook family.

### Conclusions:

- The Crook Cemetery contains the remains of members of the Crook family. The identities of any individuals buried in unmarked graves (if present) are not known for certain. Potential identities of those buried in unmarked graves or in graves with uninscribed markers include Victor Crook, Eliza Jane *Medlin* Crook, Ellen *Crook* Price, Mary E. Crook, James Henry Fitzgerald Crook, and Ronald Simpson.
- The total number of graves present is estimated to be 24; however, the number of unmarked graves is unknown.
- Letters to 133 descendants of Victor Crook and Eliza Jane Medlin Crook were mailed on November 3, 2025. Eight responses have been received at this time.
- The Crook Cemetery is recommended not eligible for the National Register of Historic Places.
- The legal advertisement ran in *The Enquirer-Journal* on October 11, 18, 25 and November 1, 2025. The affidavit is included as an appendix to this report.

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- 1910 Population Schedule, Monroe Township, Union County, North Carolina. Electronic document, <https://www.ancestry.com/imageviewer/collections/7884/>, accessed November 2025.
- 1920 Population Schedule, Monroe Township, Union County, North Carolina. Electronic document, <https://www.ancestry.com/imageviewer/collections/6061/>, accessed November 2025.
- 1940 Population Schedule, Monroe Township, Union County, North Carolina. Electronic document, <https://www.ancestry.com/search/collections/2442/>, accessed November 2025.
- 1950 Population Schedule, Monroe City, Union County, North Carolina. Electronic document, <https://www.ancestry.com/search/collections/62308/>, accessed November 2025.

*Western Carolinian* [Salisbury, North Carolina]

- 1822 List of Letters. January 22:3.

## Appendix A: North Carolina General Statute 65-106

Part 4. Removal of Graves.

**§ 65-106. Removal of graves; who may disinter, move, and reinter; notice; certificate filed; reinterment expenses; due care required.**

(a) The State of North Carolina and any of its agencies, public institutions, or political subdivisions, the United States of America or any agency thereof, any church, electric power or lighting company, or any person, firm, or corporation may effect the disinterment, removal, and reinterment of graves as follows:

- (1) By the State of North Carolina or any of its agencies, public institutions, or political subdivisions, the United States of America or any agency thereof, when it shall determine and certify to the board of county commissioners in the county from which the bodies are to be disinterred that such removal is reasonably necessary to perform its governmental functions and the duties delegated to it by law.
- (2) By any church authority in order to erect a new church, parish house, parsonage, or any other facility owned and operated exclusively by such church; in order to expand or enlarge an existing church facility; or better to care for and maintain graves not located in a regular cemetery for which such church has assumed responsibility of care and custody.
- (3) By an electric power or lighting company when it owns land on which graves are located, and the land is to be used as a reservoir.
- (4) By any person, firm, or corporation who owns land on which an abandoned cemetery is located after first securing the consent of the governing body of the municipality or county in which the abandoned cemetery is located.

(b) The party effecting the disinterment, removal, and reinterment of a grave containing a decedent's remains under the provisions of this Part shall, before disinterment, give 30 days' written notice of such intention to the next of kin of the decedent, if known or subject to being ascertained by reasonable search and inquiry, and shall cause notice of such disinterment, removal, and reinterment to be published at least once per week for four successive weeks in a newspaper of general circulation in the county where such grave is located, and the first publication shall be not less than 30 days before disinterment. Any remains disinterred and removed hereunder shall be reinterred in a suitable cemetery.

(c) The party removing or causing the removal of all such graves shall, within 30 days after completion of the removal and reinterment, file with the register of deeds of the county from which the graves were removed and with the register of deeds of the county in which reinterment is made, a written certificate of the removal facts. Such certificate shall contain the full name, if known or reasonably ascertainable, of each decedent whose grave is moved, a precise description of the site from which such grave was removed, a precise description of the site and specific location where the decedent's remains have been reinterred, the full and correct name of the party effecting the removal, and a brief description of the statutory basis or bases upon which such removal or reinterment was effected. If the full name of any decedent cannot reasonably be ascertained, the removing party shall set forth all additional reasonably ascertainable facts about the decedent including birth date, death date, and family name.

The fee for recording instruments in general, as provided in G.S. 161-10(a)(1), for registering a certificate of removal facts shall be paid to the register of deeds of each county in which such certificate is filed for registration.

(d) All expenses of disinterment, removal, and acquisition of the new burial site and reinterment shall be borne by the party effecting such disinterment, removal, and reinterment, including the actual reasonable expense of one of the next of kin incurred in attending the same, not to exceed the sum of two hundred dollars (\$200.00).

(e) The Office of Vital Records of North Carolina shall promulgate regulations affecting the registration and indexing of the written certificate of the removal facts, including the form of that certificate.

(f) The party effecting the disinterment, removal, and reinterment of a decedent's remains under the provisions of this Part shall ensure that the site in which reinterment is accomplished shall be of such suitable dimensions to accommodate the remains of that decedent only and that such site shall be reasonably accessible to all relatives of that decedent, provided that the remains may be reinterred in a common grave where written consent is obtained from the next of kin. If under the authority of this Part, disinterment, removal, and reinterment are effected by the State of North Carolina or any of its agencies, public institutions, or political subdivisions, the United States of America or any agency thereof, any electric power or lighting company, then such disinterment, removal, and reinterment shall be performed by a funeral director duly licensed as a "funeral director" or a "funeral service licensee" under the provisions of Article 13A of Chapter 90 of the General Statutes.

(g) All disinterment, removal, and reinterment under the provisions of this Part shall be made under the supervision and direction of the county board of commissioners or other appropriate official, including the local health director, appointed by such board for the county where the disinterment, removal, and reinterment take place. If reinterment is effected in a county different from the county of disinterment with the consent of the next of kin of the deceased whose remains are disinterred, then the disinterment and removal shall be made under the supervision and direction of the county board of commissioners or other appropriate official, including the local health director, appointed by such board for the county of the disinterment, and the reinterment shall be made under the supervision and direction of the county board of commissioners or other appropriate official, including the local health director, appointed by such board for the county of reinterment.

Due care shall be taken to do said work in a proper and decent manner, and, if necessary, to furnish suitable coffins or boxes for reintering such remains. Due care shall also be taken to remove, protect, and replace all tombstones or other markers, so as to leave such tombstones or other markers in as good condition as that prior to disinterment. Provided that in cases where the remains are to be moved to a perpetual care cemetery or other cemetery where upright tombstones are not permitted, a suitable replacement marker shall be provided.

(h) Nothing contained in this Part shall be construed to grant or confer the power or authority of eminent domain, or to impair the right of the next of kin of a decedent to remove or cause the removal, at his or their expense, of the remains or grave of such decedent. (1919, c. 245; C.S., ss. 5030, 5030(a); Ex. Sess. 1920, c. 46; 1927, c. 23, s. 1; c. 175, s. 1; 1937, c. 3; 1947, cc. 168, 576; 1961, c. 457; 1963, c. 915, s. 1; 1965, c. 71; 1971, c. 797, s. 1; 1977, c. 311, s. 1; 2001-390, s. 3; 2007-118, s. 1.)

## **Appendix B: Legal Advertisement Affidavit and Next-of-Kin Letter**



October 9, 2025

[NAME]  
[STREET ADDRESS]  
[CITY, STATE ZIP]

Dear [NAME]:

Richard Grubb & Associates, Inc. (RGA) is researching the history of the Crook Family Cemetery located on the east side of Secrest Short Cut Road (PIN 09216076C) in Monroe, Union County, North Carolina (see attached map). This work is being done on behalf of Geetha Vallabhaneni and Srinivas Kollipara (the property owners), who are preparing to market the property for development.

Pursuant to North Carolina General Statute § 65-106 (Removal of Graves) (NCGS § 65-106), Ms. Vallabhaneni and Mr. Kollipara intend to request approval to relocate the graves in the Crook Cemetery at a future meeting the Monroe City Council. While the meeting has not yet been scheduled, it is anticipated to occur in late fall 2025 or early winter 2025. In accordance with the statute, a 30-day written notice of intention must be provided to the next-of-kin of the deceased (if known) before any disinterment, relocation, and reinterment may occur. The proposed reinterment location is Suncrest Cemetery, located at the intersection of Bickett Street and Johnson Street (PIN 09235097). All costs for the grave relocation will be borne in full by the property owners.

The Crook Family Cemetery is situated in an agricultural field about 0.25 miles north of the intersection of Secrest Short Cut Road and West Roosevelt Boulevard, near the western edge of a 5.5-acre parcel. The cemetery contains a variety of gravemarkers made of slate, marble, and granite, some of which are in a state of disrepair (see Photos). Some gravemarkers are inscribed and others are not. In total, there are approximately 24 marked burials. The names on the inscribed gravemarkers include the following individuals:

- Horace S. Crook (1894–1975) and Hattie Horne Crook (1892–1967)
- Isaac Bernard Belk (1911–1913)
- Wilma Lucille Crook (1918–1918)
- Josiah Crook (1847–1925) and Harrie E. Crook (1850–1914)
- William P. Keziah (1877–1945) and Lizzie Ann Crook Keziah (1880–1927)
- Eliza J. Crook (unknown–1899)
- J. E. Crook (1882–1893)
- C. E. Crook (1882–1893)
- Violet Smith (1915–1917)
- Mamie J. Helms (1899–1917)
- Baucom (1903–1918)
- James Crook (1858–1923) and Sarah Ann Crook (1863–1924).

Through our genealogical research, we believe you may be related to Eliza J. Crook (d. 1899), who was the second wife of Victor Crook (d. 1869). As a potential next-of-kin, we are notifying you in accordance with NCGS § 65-106 regarding the intended relocation of the Crook Family Cemetery.

If you have any questions about the proposed relocation of the Crook Family Cemetery, please contact me at [heckendorf@rgaincorporated.com](mailto:heckendorf@rgaincorporated.com) or 609-366-7101. Letters may also be sent to the following address:

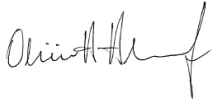
Richard Grubb & Associates, Inc.  
525 Wait Avenue  
Wake Forest, NC 27587

Crook Family Cemetery

October 9, 2025

Page 2

Thank you,

A handwritten signature in black ink, appearing to read "Olivia Heckendorf". The signature is fluid and cursive, with the first name "Olivia" being more legible than the last name "Heckendorf".

Olivia Heckendorf  
Architectural Historian  
RGA, Inc.

### Map



Aerial photograph from 2025 showing the location of the Crook Family Cemetery.

Photos



Overview of the Crook Family Cemetery.



Gravemarker for Horace S. Crook and Hattie Horne Crook.



Gravemarker for William P. Keziah and Lizzie Ann Crook.



Gravemarker for Josiah Crook and Harriet E. Crook.



Gravemarker for Eliza J. Crook.



Gravemarker for James Crook.



**STAFF REPORT**

**TO:** General Services Committee  
**VIA:** Mark Watson, City Manager  
**DATE:** January 8, 2026  
**FROM:** Sarah McAllister, P.E., Engineering Director  
**PREPARED BY:** Will Auret, P.E., Land Development Engineering Manager  
**SUBJECT:** Request for Sidewalk Deviation at 1815 N Rocky River Road

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**SUMMARY STATEMENT**

The General Services Committee is requested to consider a request from Robert E. Moore, Architect, for a deviation from the sidewalk requirements along 1815 N Rocky River Road. The requirements consist of an eight-foot-wide sidewalk along frontage of 1815 N Rocky River Road associated with the proposed addition at 1815 N Rocky River Road.

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**REVIEW**

The City of Monroe *Standard Specifications and Detail Manual*, Section 02.02.06 Sidewalk Requirements, requires sidewalk to be provided along existing arterial and collector streets as a development requirement based on definitions in Section 02.01.01. Development Requirements of the Manual. This section requires the eight-foot-wide sidewalk along the property frontage. An email is attached from Robert E. Moore, Architect requesting a deviation from the sidewalk requirements along 1815 N Rocky River Road. Reasons for the deviation request cite lack of connectivity to existing sidewalks, excessive grading requirements, interference with drainage patterns, and relocation of some utilities. The proposed site development consists of a 1,116 SF office/warehouse addition.

As proposed, the site addition requires approximately 230 linear feet of eight-foot-wide sidewalk along 1815 N Rocky River Road. The intent of the sidewalk policy outlined in the Detail Manual is to allow new development to share in the placement of sidewalk along arterial and collector streets, providing for an alternative means of transportation other than motor vehicle. Over time,

this process will allow sections to be completed. Pedestrian friendliness correlates to the livability of the community.

The inclusion of pedestrian facilities meets the NCDOT Complete Streets Policy to consider and incorporate several modes of transportation when building new projects or making improvements to existing infrastructure. Existing pedestrian facilities are taken into consideration during the development of State Transportation Improvement Program Projects and decreases the costs to the City for their completion.

A copy of the email from Robert E. Moore, Architect requesting the deviation is attached along with the site plan for 1815 N Rocky River Road.

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### **RECOMMENDATION**

The General Services Committee is requested to consider the request for a deviation from the City's *Standard Specifications and Detail Manual* regarding the sidewalk requirements along the property frontage on 1815 N Rocky River Road for the proposed project. Engineering staff will be available for discussion.

Attachments:  
Email of Request for Sidewalk Deviation  
dated December 17 2025 from Robert E.  
Moore, Architect  
1815 N Rocky River Road Site Plan



City Council  
General Services Committee  
City of Monroe  
300 West Crowell Street  
Monroe NC

Re: Request for Zoning Variance – Sidewalk Installation Requirement  
Property Address: 1815 N Rocky River Road Monroe, NC 28110  
Parcel Number: 09342114H

**ROBERT E. MOORE  
ARCHITECT**

Dear Members of the City Council and the General Services Committee,

I am writing to respectfully request a zoning variance from the requirement to install a sidewalk along the frontage of property owned by Dawn Development Inc. located at 1815 N Rocky River Road Monroe, NC 28110.

The requirement to install a sidewalk would create an undue hardship due to cost disproportionate to benefit, and the lack of connectivity to existing sidewalks.

At present, there are no existing sidewalks on adjacent or nearby properties, and installing a sidewalk at this location would not meaningfully improve pedestrian connectivity or safety. In fact this would be the only sidewalk along N Rocky River Road from the Monroe Bypass to Weddington Road. A stretch of over 5 miles. Most of the property along this road is already developed and unlikely to ever have sidewalks installed.

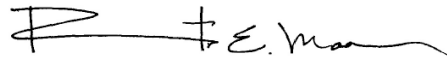
In addition, the proposed sidewalk would likely require significant grading,, interference with drainage patterns, and relocation of some utilities.

Granting this variance would not adversely affect neighboring properties or the public welfare, as pedestrian traffic in this area is minimal and the existing roadway safely accommodates current use. The requested variance represents the minimum relief necessary while maintaining the intent of the zoning ordinance.

For these reasons, I respectfully request that the Board approve this variance. I appreciate your time and consideration and am happy to provide any additional information or attend a hearing to answer questions.

100 N Sutherland Ave.  
Monroe, NC 28110  
phone. 704.283.1196  
fax. 704.289.4422  
[rmoore@remarchitect.com](mailto:rmoore@remarchitect.com)

Sincerely yours,  
ROBERT E. MOORE.ARCHITECT

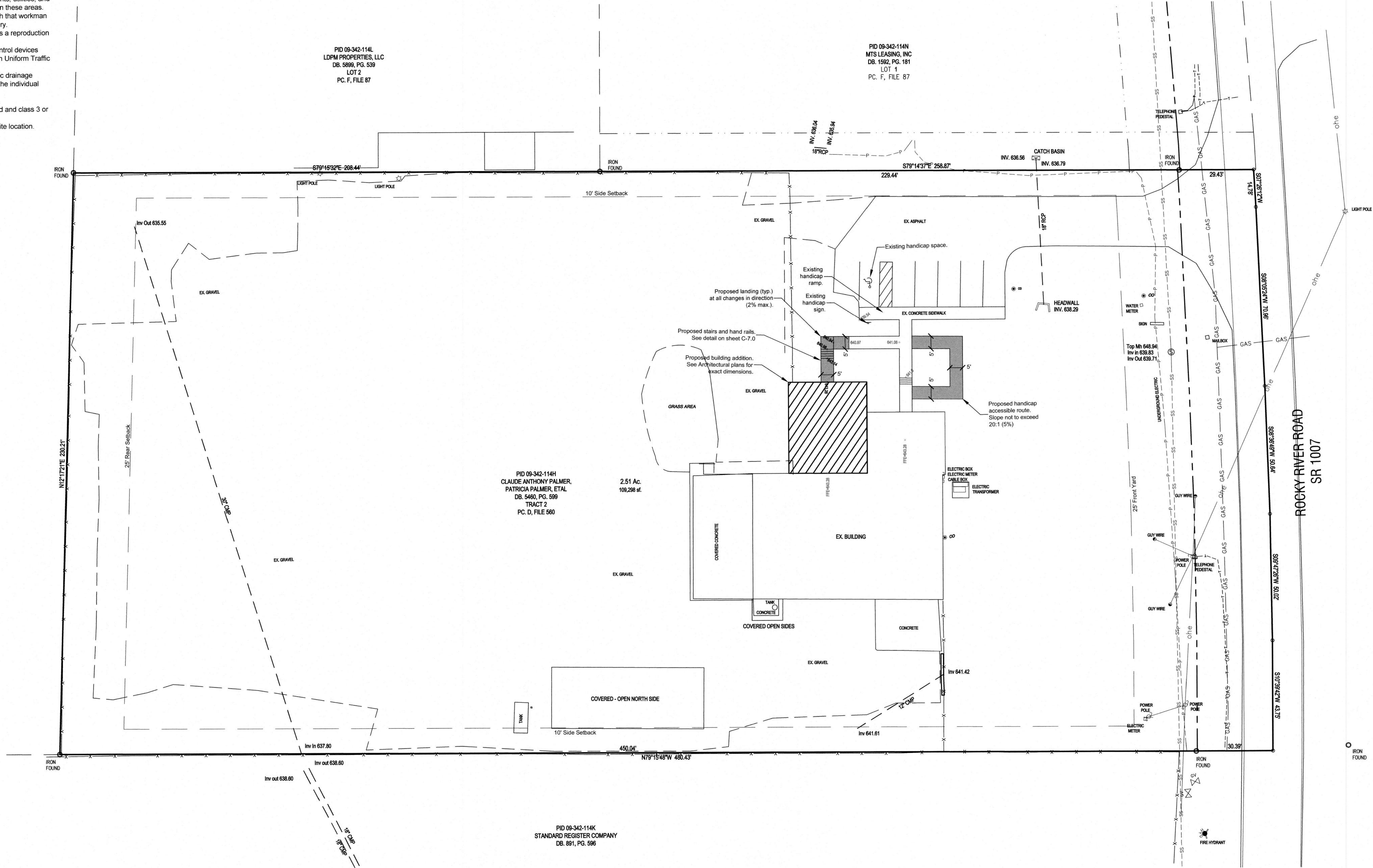
A handwritten signature in black ink, appearing to read "R. E. Moore". The signature is fluid and cursive, with a large initial "R" and a distinct "E" and "Moore" following.

Robert Moore, AIA  
NC Architectural License #4892

Site Notes:

- 1) All boundary and topographic information was taken from a survey by Lawrence Associates, PA.
- 2) All improvements and construction shall be in accordance with state and local standards.
- 3) All pavement markings shall be four (4) inch white lines unless indicated otherwise on the drawings.
- 4) Any discrepancies found in the field shall be called to the attention of the owner prior to proceeding with the work.
- 5) Prior to beginning construction, the contractor shall verify that all required permits and approvals have been obtained from all regulatory authorities.
- 6) The contractor shall contact all owners of easements, utilities, and right-of-ways, public and private, prior to working in these areas. Contractor shall maintain the site in a manner such that workman and the general public shall be protected from injury.
- 7) Do not scale drawing for actual dimensions, as it is a reproduction and subject to distortion.
- 8) All signs, pavement markings, and other traffic control devices shall conform to the latest edition of the Manual on Uniform Traffic Control Devices.
- 9) Pipe systems and/or channels located within public drainage easements are the maintenance responsibility of the individual property owner.
- 10) Refer to sheets C-3.0 for grading and drainage.
- 11) All storm drainage pipe must be NCDOT approved and class 3 or greater.
- 12) All debris is to be disposed of at an approved offsite location.

Development Summary:  
 1) Owner: Anthony Claude Palmer & etals  
 1815 N Rocky River Road  
 Monroe, NC 28110  
 2) Site Acreage: 2.51 Acres Total  
 3) Parcel Number: 09342114H  
 4) Current Zoning: GI  
 5) Soils: CmB & BdB2  
 6) Disturbed Area: 0.12 Acres (5,195 SF)  
 7) Setbacks: 25' Front  
 10' Side  
 25' Rear  
 8) Site drains to Dry Fork Creek

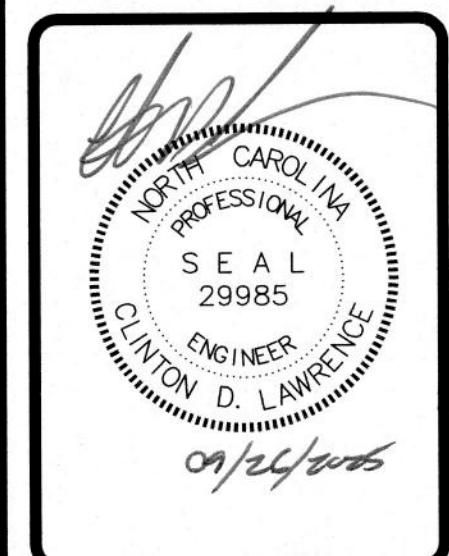


Know what's below.  
Call before you dig.

NO.	DATE	BY	ISSUE

**Dawn Development**  
 Jencan Builders  
 Carroll Jenkins  
 1501 N. Charlotte Ave  
 Monroe, NC 28110  
 704-323-4058  
 carrolljenkins@jencanbuilders.com

**LAWRENCE ASSOCIATES**  
 115 N. Church St.  
 Monroe, North Carolina 28112  
 P 704-289-1013  
 www.lawrenceassoc.com  
 Firm License Number: C-2856



**Site Plan**

DESIGNED BY	DWG	DATE	SCALE	1" = 20'

CHECKED BY	DWG	DATE	SCALE	CDL

**C-2.0**



## STAFF REPORT

**TO:** General Services Committee

**VIA:** Mark Watson, City Manager

**DATE:** January 8, 2026

**FROM:** Lisa Strickland, Finance Director

**PREPARED BY:** Lisa Strickland, Finance Director

**SUBJECT:** Budget Amendment and Budget Ordinance for Various Budget Adjustments

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### **SUMMARY STATEMENT**

Budget technical changes and adjustments are proposed to FY 2025-26 Budget to maintain budgetary compliance. All adjustments are outlined below.

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### **REVIEW**

Budget Amendment for various items as follows:

1. Adjust the financial plan for the Property/Casualty fund to increase the budget for settlements totaling \$122,750. An adjustment is also needed for replacement of a damaged pool dehumidifier and for vehicle replacements for vehicles that were declared a total loss. The total insurance proceeds for the replacement police cars, replacement Water Resources half ton truck, small pickup for the Grounds Maintenance Division and pool dehumidifier was \$331,404.
2. A technical adjustment to the original budget ordinance is necessary for software licensing for the operating program for the Aquatics and Fitness Center Fund. An increase of \$23,750 to their operating expense is necessary.
3. Technical adjustment to the payment schedule for internal borrowings from the Electric Fund for fiscal year 2026.

4. Technical adjustment to the original budget ordinance to increase contract fees for refuse collection by \$155,000. Part of these fees are covered by revenue and part are covered by the Solid Waste Fund Balance.
5. Budget Amendment to appropriate donations for property appraisal (\$600) and park improvements (\$234) from James Kerr.
6. Write off Monroe Housing Authority loan in the amount of \$15,877.96 from 4/7/1981. Promissory note was dated 5/29/1990 to Ammie Rivers at 501 Brown St. Write off Monroe Housing Authority loan in the amount of \$2,190.29 from 12/2/1993. The promissory note was dated 12/2/1993 to Mary Massey at 607 John St. The liens are no longer collectible. These two loans are the only loans remaining from the housing program with the Housing Authority back in the 90's. Staff will be closing this fund and the remaining funds totaling \$38,493.79 will be credited to the City's General Fund.

A Budget Ordinance is needed for the following item:

1. Budget Ordinance to close out the following projects:
  - MP2202 Pinedell Ave Culvert Replacement \$520,000
  - MP2101 Morgan-Windsor Alley (\$2,777)
  - MP2501 Downtown Furniture \$231
 and transfer the net amount totaling \$517,454 to the General Fund unassigned fund balance.

**RECOMMENDATION**

Staff recommends approval of the attached budget amendment and budget ordinance containing various budget adjustments for Fiscal Year 2025-26.

Attachment: BA-2026-01  
BO-2026-04

**CITY OF MONROE  
BUDGET AMENDMENT  
BA-2026-01**

1. Adjust the financial plan for the Property/Casualty fund to increase the budget for settlements totaling \$122,750. An adjustment is also needed for replacement of a damaged pool dehumidifier and for vehicle replacements for vehicles that were declared a total loss. The total insurance proceeds for the replacement police cars, replacement Water Resources half ton truck, small pickup for the Grounds Maintenance Division and pool dehumidifier was \$331,404.

Property/Casualty Fund:

Revenues:

Miscellaneous	\$331,404
Appropriation from Fund Balance	\$122,750

Expenditures:

Operations	\$454,154
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2. A technical adjustment to the original budget ordinance is necessary for software licensing for the operating program for the Aquatics and Fitness Center Fund. An increase of \$23,750 to their operating expense is necessary.

Monroe Aquatics and Fitness Center Fund:

Revenue:

Appropriation from Fund Balance	\$23,750
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Expense:

Operations	\$23,750
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3. Technical adjustment to the payment schedule for internal borrowings from the Electric Fund for fiscal year 2026.

General Fund:

Revenue

Appropriation to Fund Balance	(\$422,914)
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Expense

General Government	(\$422,914)
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4. Technical adjustment to the original budget ordinance to increase contract fees for refuse collection by \$155,000. Part of these fees are covered by revenue and part are covered by the Solid Waste Fund Balance.

Solid Waste Fund:

Revenue:

Appropriation from Fund Balance	\$75,000
Refuse Collection Fees	\$80,000

Expense	
Operations	\$155,000

5. Budget Amendment to appropriate donations for property appraisal (\$600) and park improvements (\$234) from James Kerr.

General Fund:

Revenue	
Miscellaneous Revenue	\$834
Expense	
General Government	\$600
Parks & Recreation	\$234

6. Write off Monroe Housing Authority loan in the amount of \$15,877.96 from 4/7/1981. Promissory note was dated 5/29/1990 to Ammie Rivers at 501 Brown St. Write off Monroe Housing Authority loan in the amount of \$2,190.29 from 12/2/1993. The promissory note was dated 12/2/1993 to Mary Massey at 607 John St. The liens are no longer collectible. These two loans are the only loans remaining from the housing program with the Housing Authority back in the 90's. Staff will be closing this fund and the remaining funds totaling \$38,493.79 will be credited to the City's General Fund.

Community Development Fund:

Revenue:	
Appropriation from Fund Balance	\$56,562
Expense:	
Economic & Physical Development	\$18,068
Transfer to General Fund	\$38,494

General Fund:

Revenue:	
Transfer from Community Development Fund	\$38,494
Appropriation to Fund Balance	(\$38,494)

Adopted this the 13<sup>th</sup> day of January, 2026.

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Robert A. Burns, Mayor

Attest:

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Bridgette H. Robinson, City Clerk

**CAPITAL PROJECT BUDGET ORDINANCE  
ADJUSTMENTS TO CAPITAL PROJECTS  
BO-2026-04**

**WHEREAS**, several General Fund projects are complete and it is requested that funding be credited/funded back to the General Fund. Projects to be closed at this time are as follows:

- MP2101 (\$2,777) Morgan-Windsor Alley
- MP2202 \$520,000 Pinedell Ave Culvert Replacement
- MP2501 \$231 Downtown Furniture

The closures net \$517,454 in funding that will be returned to the unassigned General Fund balance.

**NOW, THEREFORE, BE IT ORDAINED**, that the City Council of the City of Monroe adjusts the appropriations in the above projects and amends the following capital project fund revenues and expenses:

General Fund:

Revenue:

Appropriation to Fund Balance	(\$517,454)
Transfer from General Capital Project Fund	\$520,231

Expense:

Transfer to General Capital Project Fund	\$2,777
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General Capital Project Fund:

Revenue:

Transfer from General Fund MP2101	\$2,777
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Expense:

Transfer to General Fund MP2202 MP2501	\$520,231
Increase Project Expense MP2101	\$2,777
Decrease Project Expense MP2202	(\$520,000)
Decrease Project Expense MP2501	(\$231)

Adopted this 13<sup>th</sup> day of January, 2026.

Attest:

\_\_\_\_\_  
Robert A. Burns, Mayor

\_\_\_\_\_  
Bridgette H. Robinson, City Clerk



**STAFF REPORT**

**TO:** General Service Committee  
**VIA:** Mark Watson, City Manager  
**DATE:** January 8, 2026  
**FROM:** Lisa Stiwinter, Planning and Development Director  
**PREPARED BY:** Catherine Mullis, Permit & Development Administrator  
**SUBJECT:** Special Event Permit in Downtown Monroe – 2026 Dr. Martin Luther King Jr. Parade

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**SUMMARY STATEMENT**

General Services Committee is requested to consider a special event permit for an event to be held in Downtown Monroe. The annual Dr. Martin Luther King Jr. Parade will be held on January 18, 2026 from 3:00 pm – 5:00 pm.

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**REVIEW**

The applicant, Curley Trull with the Dr. Martin Luther King Jr Committee, Inc. is requesting a special event permit to hold an event in Downtown Monroe on January 18, 2026.

The annual Dr. Martin Luther King Jr. Parade is planned to be held on Sunday, January 18, 2026 in Downtown Monroe from 3:00 pm – 5:00 pm. The parade route will be closed from 1:00 pm – 5:00 pm. The applicant is estimating over 100 people will attend the event. The event will include floats and trailers, school bands, and sports groups. The businesses that will be open during the event have all signed in favor of the event.

## DEPARTMENT REVIEWS

The following departments have reviewed and approved the application with the following comments:

**Fire Department:**

Monroe Fire Department Approves Permit.

**Police Department:**

Approved.

**Engineering Department:**

Approved. Street Division is responsible for placing and removing barricades on the day of the event. Report issues or concerns to the Street Division at 704-282-4553 during normal business hours and to the Street Division Standby at 704-226-5916 on the day of the event.

**Planning and Development Department:**

Approved.

**Union County Environmental Health:**

No permit required from Union County Environmental Health.

**Legal:**

COI is approved.

**Downtown:**

Approved.

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## RECOMMENDATION

If General Services Committee is in agreement with the aforementioned approvals, a recommendation will be presented to City Council for approval of the special event permit.

Attachments:

1. Application
2. Map

received  
11/10/25



**SPECIAL EVENT PERMIT APPLICATION**

**SECTION I: GENERAL INFORMATION**

Title of Event: <i>2026 Dr. Martin Luther King, Jr. Holiday Parade</i>		
Event Website (if applicable): <i>N/A</i>	Event Date/s: <i>Sunday 1/18</i>	Event Hours: <i>1pm-5pm</i>

**USE ADDITIONAL ATTACHMENTS FOR ANY PORTIONS OF APPLICATION AS NEEDED**

<b>Event Category: (please check all that apply)</b> <input type="checkbox"/> Assembly <input type="checkbox"/> Festival/Outdoor Market <input type="checkbox"/> Run/Walk <input checked="" type="checkbox"/> Parade <input type="checkbox"/> Demonstration <input type="checkbox"/> Concert/Performance <input type="checkbox"/> Block Party <input type="checkbox"/> Educational <input type="checkbox"/> Other: _____	<b>Special Considerations: (please check all that apply)</b> <input type="checkbox"/> Alcoholic Beverages <input type="checkbox"/> Food Sales <input type="checkbox"/> Cooking <input type="checkbox"/> Merchandise Sales <input type="checkbox"/> Pets/Animals <input type="checkbox"/> Sound Amplification <input type="checkbox"/> Tents / Inflatables <input type="checkbox"/> Fireworks/Pyrotechnics <input type="checkbox"/> Portable Restrooms <input type="checkbox"/> Fire Watch/Crowd Manager (if deemed necessary by Fire Marshall) <input checked="" type="checkbox"/> Other: <i>Cemetery Gates Unlock at 12 Noon</i>
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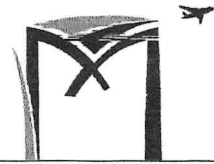
Time Set up Begins: <i>1pm (Line-Up)</i>	Time Break Down Ends: <i>5:00 PM</i>
Estimated Event Attendance: <i>100</i>	Estimated # of People at Peak Periods:
Estimated # of Vehicles: <i>50</i>	Estimated Vehicles at Peak Periods:

**SECTION II: EVENT ORGANIZATION INFORMATION**

Host Organization: <i>Dr. MLK, Jr. Committee, Inc.</i>	Applicant Name: <i>Curley Truitt II</i>		
Address: <i>POB 1802</i>	City: <i>Monroe</i>	State: <i>NC</i>	Zip: <i>28111-1802</i>
Phone#: <i>980 425 9982</i>	Mobile#:	Email: <i>curleyt309@gmail.com</i>	
Primary On-Site Contact: <i>Curley Truitt / Allen Morrison</i>		Mobile#: <i>980 425 9982</i>	
Other On-Site Contact Info: <i>Helen Morrison - 704 283 3514</i>			

**SECTION III: EVENT DETAILS**

Description of the Event: <i>2026 Dr. Martin Luther King, Jr. Holiday Parade</i>	
Location/s of the Event: <i>Downtown Monroe</i>	Site Capacity: <i>150</i>



Property Address:

Property Owner/s:

Owner/s Authorized Use:

**SECTION IV: INSURANCE REQUIREMENTS**

[REQUIRED FOR STREET CLOSURE (CITY OR NC-DOT), IF ON CITY OF MONROE PROPERTY, OR IF FIREWORKS OR ALCOHOL BEING REQUESTED]

**A COPY OF POLICY MUST BE PROVIDED WITH THE APPLICATION.**

**CITY OF MONROE MUST BE LISTED AS "ADDITIONAL INSURED" PARTY.**

COVERAGE	MINIMUM LIMITS
Workers' Compensation	Statutory Limits
Employers' Liability	\$500,000
General Liability	\$1,000,000 per occurrence/\$2,000,000 aggregate
Automobile Liability	\$1,000,000
Professional Liability (E & O)	\$1,000,000 per occurrence/\$2,000,000 aggregate

Applicant shall provide the City with a Certificate of Insurance for review prior to the issuance of any permit. This should be an ACORD form. All Certificates of Insurance will require thirty (30) days written notice by the insurer or applicant's agent in the event of cancellation, reduction or other modifications of coverage. In addition to the notice requirement above, Applicant shall provide the City with immediate written notice of cancellation, reduction, or other modification of coverage of insurance. Upon failure of the Applicant to provide such notice, Applicant assumes sole responsibility for all losses incurred by the City for which insurance would have provided coverage. The insurance certificate shall be for the initial contract period of one (1) year and shall be renewed by the applicant for each subsequent renewal period of the contract.

The City shall be named as an additional insured and it is required that coverage be placed with "A" rated insurance companies acceptable to the City. Statement should read "City of Monroe is to be added as an additional insured as evidenced by an endorsement attached to this certificate."

**SECTION V: SPECIAL CONSIDERATION DETAIL**

(CHECK EACH BOX AS APPLICABLE AND PROVIDE DETAIL REQUESTED)

**Street Closures** (map of proposed closing and route must be provided with application)

**NOTE: ALL NCDOT ROADS MUST BE APPROVED BY NCDOT**

Reason for Street Closure: Dr. Martin Luther King, Jr. Holiday Parade

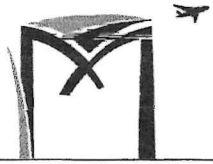
Name of Street to be closed: See Attachment from 1pm to 5pm

Additional Street: Same As Above from \_\_\_\_\_ to \_\_\_\_\_

# of Barricades needed: \_\_\_\_\_ # of cones needed \_\_\_\_\_ Drop-off location: \_\_\_\_\_

Date of Closure: Sunday, Jan. 18, 2026 Start Time: 1pm to 5pm

Additional Comments: \_\_\_\_\_



**Trash/Debris Plan:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**SECTION V: SPECIAL CONSIDERATION DETAIL (Continued)**  
(CHECK EACH BOX AS APPLICABLE AND PROVIDE DETAIL REQUESTED)

**Alcoholic Beverages\*** (check all that apply)

- Free/Host Alcohol
- Alcohol Sales (ABC Permit must accompany)
- Host and Sale Alcohol
- Beer
- Wine
- Beer and Wine
- Liquor

\* Applicant must provide a map of proposed designated area with this application. Right to modify area is reserved by the City.

**Additional Permit Attachments Required:**

- Site Map of All Activities
- Parking Plan
- Security Plan
- General Liability Insurance
- ABC Permit
- Alcohol Beverage Designated Area Map
- Proof of 501C Status
- Application Fee
- Property Owner Authorization
- Business Notification Form

**Parade/Run/Walk/Procession/Demonstration** (map of route required)

- Open Sidewalks only
- Streets w/ temporary traffic interruptions
- Street Closures
- Sidewalk Closures

Start Time: 3pm End Time: 5pm  
Purpose: Holiday Parade to Continue the Legacy of Dr. MLK, Jr.

**Tents** (Width x Length X Height)  
Dimensions of Tent: \_\_\_\_\_

**Tents greater than 400 square feet require an additional \$40 permit fee**

**Inflatables** (Width x Length X Height)  
Dimensions of Inflatable: \_\_\_\_\_

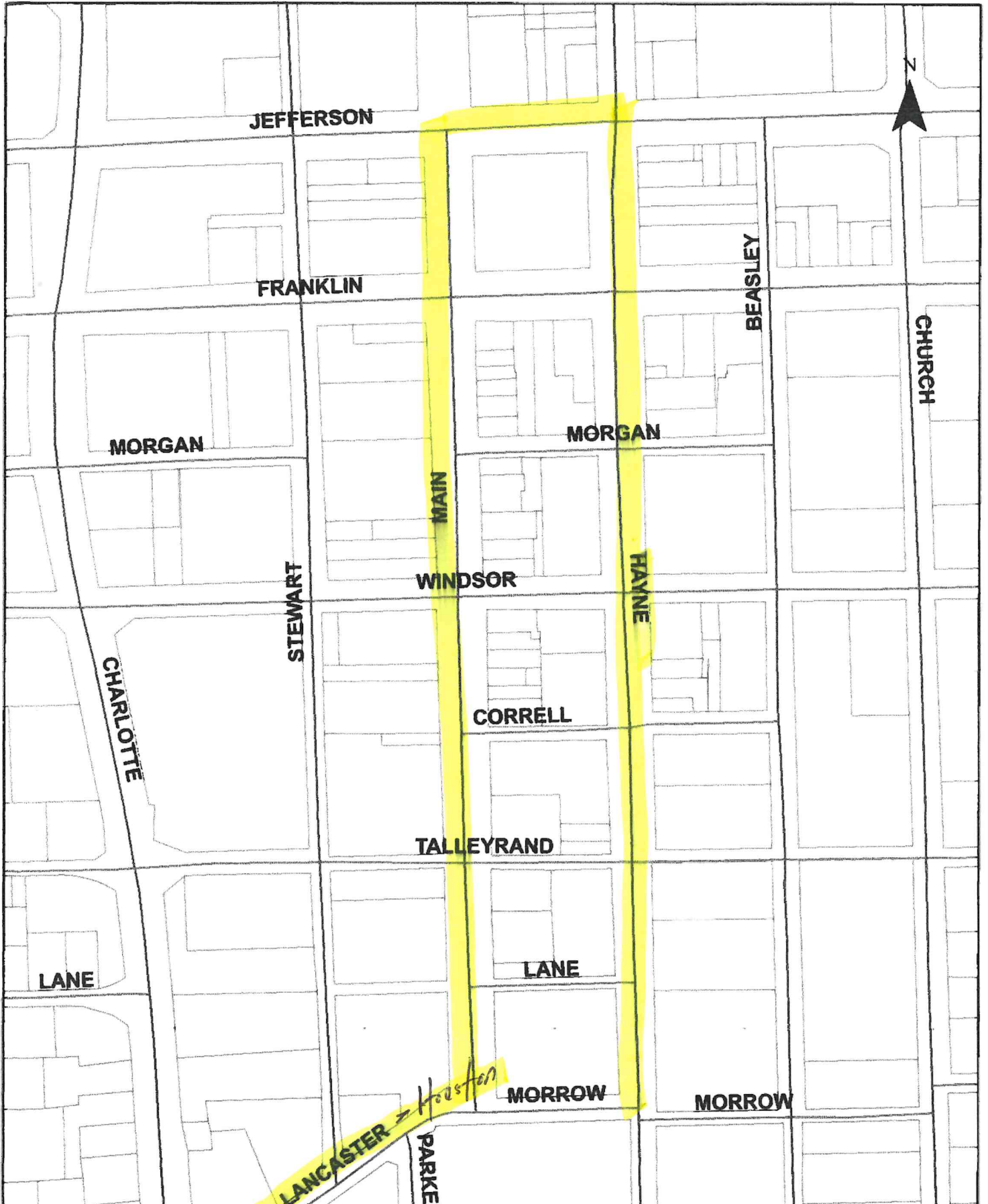
**Cooking or Warming Food?** (Circle One)  
Method of Heat: \_\_\_\_\_

I certify that the information contained in the foregoing application is true and correct to the best of my knowledge and belief that I have read, understand, and agree to abide by the rules and regulations governing the proposed Special Event under the City of Monroe Municipal Code and I understand that this application is made subject to the rules and regulations established by the City Council and/or City Manager or City Manager's designee. Applicant agrees to comply with all other requirements by the City, County, State, and Federal Government, and any other applicable entity which may pertain to the use of the Event venue and the conduct of the Event. I agree to abide by these rules, and further certify that I, on behalf of the host organization, am also authorized to commit that organization, and therefore the host organization agrees to be financially responsible for any costs, fees, and damages, that may be incurred by or on behalf of the Event to the City of Monroe. I understand the application fee is non-refundable and due at the time of application submittal. The submission of this application is not an automatic approval or guarantee. No City of Monroe logo or seal may be used on any promotional material or advertisement.

Print Name of Application/Host Organization: Dr. Martin Luther King, Jr. Comm. Title: Pres. Curley Trull  
Signature: Curley Trull Submission Date: 11/10/2025



# Map of Downtown



*Washington* →  
*Houston* →





**STAFF REPORT**

**TO:** General Services Committee  
**VIA:** Mark Watson, City Manager  
**DATE:** January 8, 2026  
**FROM:** Leesa Jensen, Director of Human Resources  
**PREPARED BY:** Leesa Jensen, Director of Human Resources  
Glenn LeGrande, Risk Manager  
**SUBJECT:** 2025-2026 Insurance Renewals: Excess Workers Compensation and Airport Operations Liability.

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**SUMMARY STATEMENT**

Staff submits to the General Services Committee, the 2025-2026 Airport Liability and Workers Compensation Excess insurance renewals for review. Staff is requesting approval for payment of renewal premiums as outlined and authorization for the City Manager to execute necessary documents.

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**REVIEW**

The City of Monroe purchases insurance coverage for Airport Operations Liability as well as Excess Workers Compensation coverage. The City of Monroe is self-insured for Workers Compensation exposure with a \$650K per claim retention. The City purchases excess coverage above the self-insured retention.

**Airport Liability:**

The City’s Airport Operations Liability coverage is through CHUBB Insurance on ACE Property & Casualty Insurance company paper (AA S&P, A++ BEST). Coverage limits for airport operations liability is \$50M each occurrence/event for bodily injury or property damage. \$50M each not “in flight” Hangar-keepers any one occurrence and any one aircraft. Also \$50M Non-Owned aircraft liability any one occurrence.

Expiring premium: \$56,584.00  
Renewal Premium: \$57,999.00  
*2.5% increase from expiring premium*

**Excess Workers Compensation:**

The City's Excess Workers Compensation coverage is through Midwest Employers Casualty, with an expiring premium of \$138,978.00, and a specific retention of \$650K including Statutory Limits.

The carrier has presented several options for the renewal. Please see the attached renewal table for specific details relative to the various options. In summary, the options range from 1-year term with split retentions for public safety departments to 2-year term offerings with \$650K retention and split retentions for public safety departments.

I would like to focus your attention on options #1 and #3 as outlined in the attached premium renewal table.

*Option #1:* \$650K retention 1-year term at \$149,591.00.

*Option#3:* \$650K retention 2-year term expiring 12/1/2027 at \$149,591.00 (annual billing) for a total of \$299,182.00 for 2-year term.

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**RECOMMENDATION**

Staff request a favorable recommendation to City Council to approve Option# 3 for Excess Workers Compensation for a 2-year term and Airport Operations Liability coverage totaling \$357,18.00 and authorize the City Manager to execute the necessary documents.



Renewal Premium Results – Excess WC and Airport Liability

Line of Business	12/01/2024-12/01/2025 Midwest Casualty - Expiring SIR \$650,000	12/01/2025-12/1/2026 Midwest Casualty - Renewal Option #1 SIR of \$650,000	12/01/2025-12/1/2026 Midwest Casualty - Renewal Option #2 Split SIR of \$750,000 for fire and police and \$650,000 all other	12/01/2025-12/1/2027 Midwest Casualty - Renewal Option #3 - Two Year Term SIR of \$650,000; Term Premium: \$299,182.00 paid in annual installment of \$149,591.00	12/01/2025-12/1/2027 Midwest Casualty - Renewal Option #4 - Two Year Term Split SIR of \$750,000 for fire and police and \$650,000 all other; Term Premium: \$279,884.00 paid in annual installment of \$139,942.00
<b>Excess Workers Compensation</b>					
Payroll	\$45,275,843.00	\$47,070,908.00	\$47,070,908.00	\$47,070,908.00	\$47,070,908.00
Limit	Statutory	Statutory	Statutory	Statutory	Statutory
Employer Liability Limit	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00
Aggregate Limit	\$2,000,000.00	\$2,000,000.00	\$2,000,000.00	\$2,000,000.00	\$2,000,000.00
Minimum Aggregate Retention	\$1,866,403.00	\$1,940,412.00	\$1,940,412.00	\$3,492,695.00	\$3,492,695.00
Aggregate Loss Limitation	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00
SIR					
Specific Retention	\$650,000.00	\$650,000.00	\$650,000.00	\$650,000.00	\$650,000.00
7720			\$750,000.00		\$750,000.00
7710			\$750,000.00		\$750,000.00
Rate per \$100	0.306958	0.3178	0.2973	0.3178	0.2973
Total Premium	\$138,978.00	\$149,591.00	\$139,942.00	\$149,591.00	\$139,942.00
\$ Change		\$10,613.00	-\$9,649.00	\$10,613.00	\$964.00
Premium % Change		7.64%	0.69%	7.64%	0.69%
Exposure Change %		4.0%	4.0%	4.0%	4.0%
Net overall rate change %		3.7%	-3.3%	3.7%	-3.3%
Estimated WC Premium Cost	\$138,978.00	\$149,591.00	\$139,942.00	\$149,591.00	\$139,942.00
Airport Liability	\$56,584.00	\$57,999.00	\$57,999.00	\$57,999.00	\$57,999.00
<b>TOTAL PREMIUM COST</b>	<b>\$195,562.00</b>	<b>\$207,590.00</b>	<b>\$197,941.00</b>	<b>\$207,590.00</b>	<b>\$197,941.00</b>

**Recommendation:** We recommend either option 1 or option 3 for this renewal. The advantages of option 3 are that the premium will remain the same for 2026-27 renewal which helps for budgeting purposes and there will be no applications to complete reducing the administrative burden for City Risk Management.

## Client Authorization to Bind Coverage

After careful consideration of Gallagher's proposal dated 10/31/2025, we accept the following coverages. Please check the desired coverage and note any coverage amendments below:

	Coverage/Carrier
<input checked="" type="checkbox"/> Accept <input type="checkbox"/> Reject	<b>Airport Liability - \$57,999.00 Premium</b> Ace Property & Casualty Insurance Company
<input type="checkbox"/> Accept <input checked="" type="checkbox"/> Reject	War Coverage - \$5,800.00; reducing to \$1,450 if TRIA is also purchased
<input type="checkbox"/> Accept <input checked="" type="checkbox"/> Reject	TRIA Coverage - \$5,800.00
<input type="checkbox"/> Accept <input checked="" type="checkbox"/> Reject	<b>Excess Workers' Compensation Option 1</b> Midwest Employers Insurance Company \$149,591.00 total premium \$650,000 SIR // 1 year term
<input type="checkbox"/> Accept <input checked="" type="checkbox"/> Reject	<b>Excess Workers' Compensation Option 2</b> Midwest Employers Insurance Company \$139,942.00 total premium \$650,000 SIR // \$750,000 SIR fire & police only // 1 year term
<input checked="" type="checkbox"/> Accept <input type="checkbox"/> Reject	<b>Excess Workers' Compensation Option 3</b> Midwest Employers Insurance Company \$299,182 total premium (\$149,591 annually) \$650,000 SIR // 2 year term
<input type="checkbox"/> Accept <input checked="" type="checkbox"/> Reject	<b>Excess Workers' Compensation Option 4</b> Midwest Employers Insurance Company \$279,884 total premium (\$139,942 annually) \$650,000 SIR // \$750,000 SIR fire & police only // 2 year term
<b>Included</b>	<b>TRIA</b>

**Additional Recommended Coverages** Gallagher recommends that you purchase the following additional coverages for which you have exposure. By checking the box(es) below, you request that Gallagher provide you with a Proposal for this coverage. By not requesting a Proposal for this coverage, you assume the risk of any uncovered loss.

Cyber Liability

**Fee Breakdown** Agency Bill Administration Fee: \$200.00 - By signing below, you acknowledge that the fee listed above is fully earned and is NOT refundable. The fee is due and payable within thirty (30) days of your execution below. Any placements that require the payment of additional state or federal taxes and/or fees are the client's responsibility.

**Exposures and Values** You confirm the payroll, values, schedules, and any other information pertaining to your operations, and submitted to the underwriters, were compiled from information provided by you. If no updates were provided to Gallagher, the values, exposures and operations used were based on the expiring policies. You acknowledge it is your responsibility to notify Gallagher of any material change in your operations or exposures.

**Additional Terms and Disclosures** Gallagher is not an expert in all aspects of your business. Gallagher's Proposals for insurance are based upon the information concerning your business that was provided to Gallagher by you. Gallagher expects the information you provide is true, correct and complete in all material respects. Gallagher assumes no responsibility to independently investigate the risks that may be facing your business but rather have relied upon the information you provide to Gallagher in making our insurance Proposals. Gallagher's liability to you arising from any of Gallagher's acts or omissions will not exceed \$20 million in the aggregate. The parties each will only be liable for actual damages incurred by the other party, and will not be liable for any indirect, special, exemplary, consequential, reliance or punitive damages. No claim or cause of action, regardless of form (tort, contract, statutory, or otherwise), arising out of, relating to or in any way connected with the Proposal, any of Gallagher's services or your relationship with Gallagher may be brought by either party any later than two (2) years after the accrual of the claim or cause of action. Gallagher has established security controls to protect Client confidential information from unauthorized use or disclosure. For additional information, please review Gallagher's Privacy Policy located at <https://www.aig.com/privacy-policy/>. You have read, understand and agree that the information contained in the Proposal and all documents attached to and incorporated into the Proposal, is correct and has been disclosed to you prior to authorizing Gallagher to bind coverage and/or provide services to you. By signing below or authorizing Gallagher to bind your insurance coverage through email when allowed, you acknowledge you have reviewed and agreed with terms, conditions and disclosures contained in the Proposal.

By: MARK WATSON, CITY MANAGER  
Print Name (Specify Title)

CITY OF MONROE, NC  
Company

\_\_\_\_\_  
Signature

Date: \_\_\_\_\_