



**Wake Forest Board of Commissioners Work Session
Meeting Agenda
October 04, 2022 at 6:00 PM**

1. Presentations

- 1.1. Unified Development Ordinance (UDO) Comprehensive Update - Work Session #2 with Consultants
[UDO Update Work Session #2 Agenda Summary](#)
[UDO Analysis and Preliminary Recommendations Memo](#)
- 1.2. Wake Forest Public Transit Plan: Toole Design Group LLC (Consultant Team)
Introduction and Project Kick-Off Presentation
[Agenda Summary](#)

2. Discussion of Monthly Financial Report

- 2.1. Monthly Financial Report
[August 31, 2022 Financial Summaries.pdf](#)

3. Review of Draft Agenda for Upcoming Regular Meeting

- 3.1. Review of Draft Agenda for Upcoming Regular Meeting
[DraftBOCAgendaSept202218.pdf](#)

4. Other Business

- 4.1. Closed Session - NCGS 142-318.11(a)(5) To establish, or to instruct the public body's staff or negotiating agents concerning the position to be taken by or on behalf of the public body in negotiating (i) the price and other material terms of a contract or proposed contract for the acquisition of real property by purchase, option, exchange, or lease.

Closed Session - Consultation with the Town Attorney, N.C.G.S. § 143.318.11(a)(3):
Town of Wake Forest v. Ailey Young Heirs (21-CVS-13894).

5. Commissioner Reports

6. Adjournment



Board of Commissioners Work Session Agenda Item Report

Agenda Item No.: 2021-660-
Submitted by: Kari Grace
Submitting Department: Planning
Meeting Date: October 4, 2022

SUBJECT

Unified Development Ordinance (UDO) Comprehensive Update - Work Session #2 with Consultants

Recommendation:

Item Summary:

ATTACHMENTS

- [UDO Update Work Session #2 Agenda Summary](#)
- [UDO Analysis and Preliminary Recommendations Memo](#)

Agenda Item: Unified Development Ordinance (UDO) Comprehensive Update – Work Session #2 with Consultants

Summary: The Town hired Houseal Lavigne Associates as consultants for the comprehensive update of the UDO. The project kickoff and initial public engagement phases have been completed, which informed the UDO analysis stage. Houseal Lavigne staff will present current UDO analysis findings and preliminary recommendations.

The purpose of the work session is to gather feedback from the Board of Commissioners; no voting items are part of the work session. As the project continues, there will be additional work sessions on specific topic areas as well as ongoing public engagement opportunities.

Attachments: UDO Analysis and Preliminary Recommendations Memo

MEMORANDUM

Date: September 19, 2022

SENT VIA EMAIL

To: Town of Wake Forest
Kari Grace, AICP, CZO, Senior Planner

From: Houseal Lavigne Associates
Jackie Wells, AICP, Senior Planner
Ruben Shell, AICP, Planner II

Re: **Existing UDO Analysis and Preliminary Recommendations Memo
Wake Forest, NC UDO & MSSD Update**

The purpose of this memorandum is to introduce key themes for the update of the Town of Wake Forest's Unified Development Ordinance (UDO) and to provide Houseal Lavigne's preliminary recommendations on how to address issues and concerns with the UDO relayed during public outreach and to align regulations with best practices. The assessment and preliminary recommendations were developed based on conversations with Wake Forest Town staff, department heads, elected and appointed officials, residents, developers, stakeholders, and other participants of public outreach.

This memorandum begins by detailing the key UDO update themes that have emerged through the outreach process, assessment of alignment with the Town's recent planning efforts including the Community Plan; Northeast Community Plan; Parks, Recreation, and Cultural Resources Master Plan; Historic Preservation Plan; Public Art Vision Plan; Housing Affordability Plan; and Comprehensive Transportation Plan, and Houseal Lavigne's understanding of modern best practices. The memorandum proceeds to address how the Town's zoning districts can be better aligned with the future land use plan and summarizes best practices research regarding specific topic areas to show how comparative communities address specific land use and zoning issues.



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INTRODUCTION

The Town of Wake Forest is updating its Unified Development Ordinance (UDO) to modernize regulations, implement recommendations from the Town's recent planning efforts, make the ordinance more user-friendly, and ensure all regulations are compliant with applicable state and federal laws.

The update involves a five-step process that will take approximately 24-months to complete. The project kicked-off in the Summer of 2022 with extensive community outreach including meetings with Town staff, elected and appointed officials, the UDO Update Technical Review Group; interviews and discussions with stakeholders and focus groups; two public open house sessions; and an online questionnaire. In total approximately 650 people were engaged through upfront outreach efforts.

The update is now in step 2 of the process, Existing UDO Analysis and Preliminary Recommendations. This step involves the thorough review and assessment of the Town's existing UDO to identify what updates are needed to address the issues and concerns relayed during outreach efforts, to align standards with best practices, and to implement recommendations from the Town's various plans. The results of this step in the process are presented in the following pages.

PROJECT TIMELINE





KEY UDO UPDATE THEMES

The UDO Update process began with extensive community outreach including meetings with Town staff, elected and appointed officials, the UDO Update Technical Review Group; interviews and discussions with stakeholders and focus groups; two public open house sessions; and an online questionnaire. In total approximately 650 people were engaged through upfront outreach efforts. Feedback received from these efforts as well as Houseal Lavigne's assessment of alignment between the Town's UDO and its recent planning efforts, including the Community Plan; Northeast Community Plan; Parks, Recreation, and Cultural Resources Master Plan; Historic Preservation Plan; Public Art Vision Plan; Housing Affordability Plan; Comprehensive Transportation Plan; and the Wake County Multi-Jurisdictional Hazard Mitigation Plan, formed the foundation for the key UDO update themes. The sections below provide detail regarding each theme and Houseal Lavigne's preliminary recommendations on how to update the UDO to address them. The following Zoning Best Practices section of this Memo includes further information on select topics.

Note: The recommendations detailed below are preliminary and subject to change throughout the UDO update process.

Improve Ease of Use

Outreach participants discussed how the UDO should be updated to be more user friendly. Primary areas of concern included inconsistency in terminology, redundancy between UDO standards and MSSD standards, conflicts between diagrams and text, lack of diagrams, and the lack of colocation of standards regarding the same topic.

To address these concerns and better align the UDO with best practices, the Town should consider:

1. Establishing preferred terms and revising the UDO for consistency;
2. Establishing clear "Purpose and Intent" and "Applicability" sections for each chapter, especially to guide non-greenfield development;
3. Including flow charts for all processes;
4. Adding definitions as needed;
5. Evaluating the necessity of existing overlay districts;
6. Listing lot standards, building heights, setbacks, and other similar intensity standards by district;
7. Removing all standards from the UDO that exist in the MSSD and in coordination with the MSSD update process, determine the required level of detail for the UDO and relocate more detailed standards to the MSSD;
8. Updating all diagrams to align with updated text;
9. Utilizing graphics, tables, charts, and lists where appropriate; and
10. Restructuring the UDO as recommended in the Proposed UDO Structure section of this memorandum.

Modernize Standards

Outreach participants discussed the need to modernize standards in the UDO regarding a range of topics including allowed uses, infill development, fences and walls, signs, parking, driveways, street design, sidewalks, landscaping and buffering, building materials, and building design. Primary areas of concern included lack of modern uses, inadequate transitions of infill development, lack of distinction in fence standards between districts, lack of sign standards, an overabundance of off-street parking, conflicts with on-street parking, lack of clarity and distinction between districts regarding driveway standards, inadequate internal and external pedestrian circulation and connectivity standards, lack of flexibility in landscape and buffering standards, and lack of distinction between building types in design and materials standards.

To address these concerns and better align the UDO with best practices, the Town should consider:

1. Updating use and dimensional standards as recommended in the Land Use Plan Alignment section of this memorandum;
2. Updating the use table and supplemental use provisions to address modern principal, accessory, and temporary uses such as but not limited to food trucks/mobile vending, drone delivery, and short term rentals;
3. Evaluating the appropriateness of all uses permitted in each district to focus auto-oriented uses toward corridors;
4. Requiring a mix of uses in certain districts;



5. Enhancing infill development standards to better address transitions and distinguish between residential and nonresidential infill;
6. Establishing allowed fence materials lists that distinguish between residential, mixed use, commercial, and industrial areas;
7. Establishing temporary sign regulations to comply with case law;
8. Eliminating parking minimums and establishing parking maximums for uses as appropriate;
9. Addressing curb-side pick-up and shared mobility uses in off-street parking areas;
10. Enhancing on-street parking design standards to include requirements for features such as bump outs and regulatory parking signs;
11. Replacing driveway standards with enhanced dimensional standards that better distinguish between residential and nonresidential driveway requirements;
12. Updating stacking requirements for drive throughs, schools, and other uses;
13. Establishing on-site pedestrian walkway requirements;
14. Expanding administrative exception allowances;
15. Replacing parking lot landscape standards with standards that take into consideration the visibility of the parking from the public right-of-way; and
16. Establishing standards for new building types such as two-over-twos and varying forms of commercial buildings.

Enhance Environmental Stewardship

Outreach participants expressed a desire for Wake Forest to enhance its environmental stewardship efforts. Primary areas of concern included loss of tree canopy, lack of dark skies initiatives, lack of incentives or requirements for green infrastructure, and lack of clarity in stormwater and erosion control requirements.

To address these concerns and better align the UDO with best practices, the Town should consider:

1. Establishing conservation design standards that incentivize the preservation of environmental features such as but not limited to tree stands and natural topography;
2. Enhancing outdoor lighting standards to require energy efficient fixtures that minimize light trespass and pollution;
3. Establishing standards for solar energy collection systems;
4. Incentivizing the use of rain gardens, bioretention cells, and other green landscape infrastructure in required landscape areas;
5. Incentivizing the use of pervious surfacing materials in parking lots, walkways, and other hardscaped areas;
6. Requiring a minimum percent of species diversity in all required landscape areas, including a requirement for the use of native species;
7. Incentivizing new development to utilize green building practices that exceed minimum standards; and
8. Clarifying stormwater and erosion control requirements and in coordination with the MSSD update process, determine the required level of detail for the UDO and relocate more detailed standards to the MSSD.



Address Housing Affordability

Outreach participants expressed a concern about the increasing cost of housing in Wake Forest. The Town has recently adopted the Housing Affordability Plan which recommends that the Town consider incentives for the inclusion of affordable housing in new development. Incentives that the Town should consider include:

1. **Density Bonus.** Density bonuses allow for greater building height, lot coverage, and density in exchange for the provision of affordable housing. These bonuses help to make the affordable units feasible by allowing the developer additional developable area and return on the property. The amount of bonus should be tied to the percentage of units to be deed restricted as affordable but should be limited to a maximum of 30 percent of all units in order to avoid the over concentration of people experiencing poverty.
2. **Required Parking Reductions.** Individuals and households earning below the area median income often own cars at lower rates, making the amount of parking typically required for multifamily development an unnecessary added cost. Since developers often pass on the cost to provide parking to tenants, outsized parking requirements can cause rental rates to increase. The Town should consider allowing for a by-right reduction in required parking if a certain percent of the units are deed restricted affordable and/or if the cost of parking is not bundled with the cost of rent.
3. **Permit Consolidation.** The time associated with receiving the permits required for development can add to development cost and ultimately cause rental rates to increase. The Town should consider allowing for the concurrent review and approval of site plans and construction plans when a certain percent of units are deed restricted affordable.
4. **Fee Waivers.** Fees associated with development approval can add to cost and ultimately cause rental rates to increase. The Town should consider waiving or lowering fees for residential development when a certain percent of units are deed restricted affordable. Modified or waived fees for eligible projects would be reflected in the fee schedule adopted as part of the annual budget.

Ensure Compliance with Recent State and Federal Legislation and Case Law

Since the Town of Wake Forest adopted its UDO in 2013, there have been several changes in state and federal legislation, as well as in case law. The UDO update should include amendments to ensure compliance with these changes, including but not limited to those detailed below.

1. **Wireless Telecommunications Facilities.** In 2018, the Federal Communications Commission released the Wireless Infrastructure Third Report and Order and Declaratory Ruling, which further limits state and local government authority over certain wireless facilities. The Town's wireless telecommunications facilities standards will be assessed and updated as needed to comply.
2. **Signs.** In 2016, the Supreme Court of the United States heard the *Reed vs. the Town of Gilbert, AZ* case, and in its decision clarified that commercial and noncommercial sign copy is protected speech under the first amendment. Based on this decision, municipalities are no longer able to regulate signs based on the content of the sign copy. Since this decision, there have been several follow up cases that further clarify the Supreme Court's 2016 decision in *Reed vs. the Town of Gilbert* including but not limited to *City of Austin, TX vs. Reagan National Advertising* (2022) which clarified that municipalities are able to differentiate between on- and off-site signs. The Town's sign standards will be assessed and updated as needed to comply.
3. **Religious Land Uses.** In 2000, the federal government passed the Religious Land Use and Institutionalized Persons Act which mandates that land use regulations must grant "equal treatment" to a religious assembly or institution as compared with a nonreligious assembly or institution; not discriminate on the basis of religion or religious denomination; not totally exclude religious assemblies or institutions; and not unreasonably limit religious assemblies or institutions within a jurisdiction. Since the act was passed, it has been challenged in federal court several times, resulting in the clarification of the intent and scope of the act. The Town's allowed uses by district, definitions, and district purpose and intent statements will be assessed and updated as needed to comply.
4. **160D.** In 2019, the state of North Carolina consolidated the city- and county-enabling statutes for development regulations (formerly in Chapters 153A and 160A) into a single, unified chapter (160D). During this process, the state also incorporated clarifying amendments and consensus reforms with additional legislation passed since the July 2021 deadline. The Town's UDO will be assessed and updated as needed to comply.



LAND USE PLAN ALIGNMENT

The Land Use Plan alignment analysis was conducted to better understand how the Town's existing zoning districts do and do not align with the future land use categories in the Community Plan and the Northeast Community Plan. The analysis compares the primary and supporting uses identified as appropriate in a land use category designation in the Community Plan and Northeast Community Plan with the uses that are allowed in the related zoning districts. Planned and allowed density/intensity of development was also compared. The table below identifies the zoning district which is most closely aligned with each land use category, the level of alignment, and amendments for the Town to consider to bring the districts into further alignment with the land use categories.

Land Use Plan Alignment			
<i>Land Use Category</i>	<i>Most Aligned Zoning District(s)</i>	<i>Level of Alignment</i>	<i>Amendments to Consider for Further Alignment</i>
Conventional Residential. Conventional Residential areas consist of a mix of housing types that resemble the character and form of traditional single family neighborhoods. This can include single-family homes as well as single-family attached and multifamily developments that appear like a single-family home, such as duplexes, cottage home courts, and townhomes.	GR-3 General Residential	Mid	Allow additional residential formats including duplexes, townhomes, cottage home courts, triplexes, and quadplexes. Update dimensional standards to accommodate additional residential formats and ensure compatibility of infill development.
	GR-5 General Residential	Mid	
	GR-10 General Residential	High	Update dimensional standards to better accommodate additional residential formats and ensure compatibility of infill development.
Northeast Community Residential. The Northeast Community is a significant historic core neighborhood for Wake Forest. Settled after the Civil War, the Community established itself as a vibrant center of African American culture and tradition. The neighborhood abuts the downtown commercial area. It is bordered by E. Roosevelt Avenue/Wait Avenue to the south and N. White Street to the west. Ailey Young Park marks the eastern boundary.	none	n/a	Establish a new Northeast Community Residential District to allow only single-family detached uses, accessory dwelling units, and duplexes in keeping with the Northeast Community Plan.
Mixed Residential. Mixed Residential areas consist of planned developments that contain a wide mix of housing types, ranging from single-family homes to multifamily development.	UR Urban Residential	Mid	Allow additional multifamily formats including two-over-twos.
Transit-Supportive Residential. Transit-Supportive Residential areas include compact residential areas featuring a variety of higher intensity housing types, like apartment buildings and two-over-twos.	UMX Urban Mixed Use	Mid	Allow additional multifamily formats including two-over-twos.



Land Use Plan Alignment			
Land Use Category	Most Aligned Zoning District(s)	Level of Alignment	Amendments to Consider for Further Alignment
Neighborhood Commercial. Neighborhood Commercial uses include local-serving commercial nodes that provide surrounding residents with convenient access to day-to-day goods and services. Examples include hair salons, cafes, dry cleaners, restaurants, and small grocery or convenience stores.	NB Neighborhood Business	High	Due to level of alignment, minimal changes required.
Downtown. Downtown includes two primary areas: the Downtown Core and the Downtown Edge. The Downtown Core should continue to serve as the historic heart of the Town and the center of culture, tourism, and civic activity. Higher density residential uses should be supported in the Downtown Edge or in the upper floors of Downtown Core mixed use buildings to increase living options near the Downtown's amenities.	RA-HC	Mid	The Community Plan divides the Downtown into the Downtown Core and the Downtown Edge. The RA-HC District most closely aligns with the Downtown Core. The Town should consider updating the boundaries of the RA-HC District to better reflect the desired Downtown Core area and better distinguish between historic and non-historic areas.
	TBD	TBD	The Community Plan divides the Downtown into the Downtown Core and the Downtown Edge. No existing districts align with the Downtown Edge. Preliminarily, the Town should consider establishing a new Downtown Edge District and assess whether an existing residential district can adequately accommodate the downtown residential areas or if a new Downtown Neighborhoods District should be established.
Corridor Commercial. Corridor Commercial uses include auto-oriented retail and service businesses, such as large-scale shopping centers, grocery stores, restaurants, gas stations, and hotels. Standalone office uses are included within this designation.	HB Highway Business	High	Due to level of alignment, minimal changes required.



Land Use Plan Alignment			
Land Use Category	Most Aligned Zoning District(s)	Level of Alignment	Amendments to Consider for Further Alignment
Office. Office uses contain large-scale, standalone office developments, like corporate headquarters or hospitals, and clusters of smaller-scale offices, like professional services, legal firms, and medical offices.	NB Neighborhood Business	High	No major changes to district standards needed. Modify the Town's planned unit development process to better accommodate large-scale multibuilding office developments like corporate headquarters or hospitals.
	HB Highway Business	High	
Civic and Institutional. Civic and Institutional uses include local government uses, municipal facilities, community service providers, educational facilities, and religious institutions. Examples include Town Hall, fire stations, places of worship, the Wake Forest Community Library, Wake County public schools, charter schools, private schools, and the Southeastern Baptist Theological Seminary.	none	n/a	Establish a new Civic and Institutional District to accommodate noncommercial places of assembly such as schools, libraries, and places of worship.
Light Industrial. Light Industrial uses diversify the Town's tax base and provide local employment opportunities. They include facilities involved in the manufacturing, processing, storage, and distribution of goods and materials; telecommunication facilities; research centers; R&D/life sciences facilities; tech industries; and flex spaces.	LI Light Industrial	High	Due to level of alignment, minimal changes required.
Parks and Open Space. Parks and Open Space includes designated public park spaces managed by the Wake Forest Parks, Recreation, and Cultural Resources Department, as well as golf courses and cemeteries.	OS Open Space	High	Due to level of alignment, minimal changes required.
	All Districts	High	Indoor and outdoor recreation facilities are allowed in all zoning districts with the exception of the LI Light Industrial and HI Heavy Industrial Districts. Due to level of alignment, minimal changes required.
Utility. The Utility land use designation includes utility infrastructure, such as electrical substations and water treatment facilities.	All Districts	High	Class 1 and 2 utilities are allowed in all zoning districts with the exception of the OS Open Space District. Due to level of alignment, minimal changes required.
Note: All of the Town of Wake Forest's zoning districts are not included in the alignment analysis presented in this table. These districts, such as the ICD Institutional Campus District and PUD Planned Unit Development District, will be further evaluated during the UDO update process.			



ZONING BEST PRACTICES

Best practices and comparative community research was conducted for several topics brought up during community outreach as well as topics identified in the Town's Plans. The sections below summarize the findings of the research.

Accessory Commercial Uses

Stakeholders expressed that the Town should support small businesses, innovative industries, and diverse employment opportunities to strengthen the Town's tax base. One method to achieve this is by allowing Accessory Commercial Units (ACU), which are small commercial uses located on the same lot but subordinate to a principal residential use. Only home occupations are permitted only as an accessory use under the current UDO. Incorporating ACUs into the UDO will provide clear guidelines to develop small-scale commercial uses, subordinate to the principal use. ACUs are a relatively recent concept and few communities in the United States regulate them under their land development regulations. Wake Forest can reference Raleigh, NC; Stevens Point, WI; and Portland, OR for example regulations.

The case study localities define ACUs and include regulations on permit processes, the number of ACUs allowed per lot, setbacks, height, building coverage or maximum square footage, minimum lot size, hours of operation, and regulations for the number and type of vehicle. Additional standards include pedestrian access, appearance and the types of business activities allowed.

Food Trucks

The Town of Wake Forest does not legally permit food trucks in its UDO, although staff and stakeholders recognize the need to legally permit them. Wake Forest can reference other communities in North Carolina, including Charlotte, Raleigh, and Greensboro for example food trucks regulations.

The case study localities require food trucks to receive a permit and regulate where food trucks are allowed to be located, their hours of operation, and how many food trucks are allowed on a site. The case study localities also regulate the type and location of associated equipment and establish trash disposal requirements.

On-Street Parking

Through outreach methods, stakeholders commented on the challenges of designing streets for automobiles, pedestrians, cyclists, and on-street parking. Participants suggested that on-street parking should be provided on only one side of the street to make room for more modes of transportation and to better accommodate services like trash pick-up. Wake Forest can reference other North Carolina communities, including Raleigh and Morrisville, for example on-street parking regulations.

The case study localities require streets with on street parking to be designed with landscape chokers or other similar delineation methods, establish minimum dimensional standards for on-street parking in residential and nonresidential settings, and allow a reduction in required off-street parking if on-street parking is available within a certain distance of the subject use.

Residential Parking Maximums

Parking maximums can help Wake Forest achieve its goal to become a more pedestrian- and bike-friendly community, expand and maintain green spaces, and better manage stormwater and urban heat island issues. Strong support for parking maximums was expressed for nonresidential uses while concern regarding parking maximums for residential uses was discussed. Wake Forest can reference other North Carolina communities, including Raleigh, Knightdale, Charlotte, and Greensboro, for example parking maximums in residential districts.

The case study localities limit unenclosed parking for single-family detached and duplex uses and restrict multifamily parking based on the number of bedrooms per unit. It is important to note that Raleigh, Knightdale, and Greensboro have residential parking minimums as well as maximums, and the maximums do not apply across all residential districts.



Electric Vehicle Parking

Mass adoption of electric vehicles is forecasted in the coming decade. To ensure Wake Forest has the infrastructure needed to charge electric vehicles, it should consider requiring the installation of electric vehicle charging stations or the infrastructure to support the future installation of electric vehicle charging stations in new parking lots and structures. Wake Forest can reference other North Carolina communities, including Charlotte and Knightdale, for example electric vehicle charging station requirements.

The case study localities require electric vehicle charging stations be installed for specific use types and establishes the required number of electric vehicle charging stations based on the provided number of vehicle parking spaces. The location of parking spots with electric vehicle charging stations is also regulated.

Objective Design Standards for Multifamily and Nonresidential Development

According to the North Carolina General Statute, municipalities have the ability to regulate building design elements for multifamily and nonresidential development but cannot regulate design standards for single-family detached, duplex, or townhome building types. As Wake Forest pursues updates to its UDO it should consider enhancing its design standards for commercial; multifamily, including triplexes, quadplexes, two-over-twos, and apartment buildings; institutional/civic buildings, and industrial buildings. Wake Forest can reference other North Carolina communities, including Knightdale, Morrisville, and Wendell, for example objective design standards.

The case study localities establish general design standards for all multifamily, mixed use, and nonresidential building types that regulate building proportions, building orientation, building materials, façade articulation, and roof finishing. Standards for specific building types regulate façade design details, transparency, roof materials and relief, entrances, public gathering space provision and activation, and more.

Infill Development Transition Standards

The Community Plan prioritizes infill development for future growth. The UDO currently addresses infill development, but the standards only provide setback and lot width guidelines. To better accommodate context sensitive infill development, the Town should consider standards that ease transitions between existing and infill development. Wake Forest can reference other North Carolina communities, including Raleigh, Durham, Morrisville, and Greensboro for example infill development standards.

The case study localities establish standards for infill development that address applicability, setbacks, lot area, height, driveway/parking access, and transitions.



PROPOSED UDO STRUCTURE

The Wake Forest UDO currently includes 146 sections across 17 chapters. The structure of the document is, for the most part, streamlined and logical, and participants of outreach activities expressed how it is easy to use. There are several opportunities to further streamline the UDO by relocating and consolidating sections. The text below provides detail on which sections are proposed to be restructured as well as where new sections are proposed to be introduced. The following is a preliminary analysis and recommendation and is subject to change as the UDO sections are drafted.

Chapter 1: Purpose and Applicability

Chapter 1: Purpose and Applicability includes high level information regarding the title, authority, jurisdiction, purpose, and intent of the UDO.

It is recommended that the Town add a new section to Chapter 1 regarding Permit Choice and Vested Rights in order to comply with NCGS 160D.

Chapter 2: District Provisions

Chapter 2: District Provisions includes standards related to specific zoning districts including their purpose and intent and dimensional standards. It is recommended that the Town consider renaming Chapter 2: Zoning Districts.

Several sections of Chapter 4 are proposed to be relocated to Chapter 2, including, section 4.3.4 Encroachments. These sections directly apply to district dimensional standards and should be collocated with those standards in Chapter 2.

Similarly, it is recommended that the use related standards in Section 2.3 be relocated to Chapter 3 so as to be collocated with the associated supplemental use standards.

It is also recommended that the Town add a new section to Chapter 2 regarding allowed density bonuses. The Town should also consider consolidating section 2.4 Overlay Districts with section 2.5 Floating Overlay Districts.

Chapter 3: Supplemental Use Standards

Chapter 3: Supplemental Use Standards includes standards that apply to specific uses, often related to mitigating negative off-site impacts.

Section 2.3 Uses Permitted is proposed to be relocated to Chapter 3. To reflect this change, the title of Chapter 3 is proposed to be revised to Chapter 3: Use Standards.

Two sections of Chapter 4 are also proposed to be relocated to Chapter 3, including 4.6 Accessory Uses and Structures and 4.7 Temporary Uses. No other major changes are proposed to the structure of Chapter 3.

Chapter 4: General Provisions for All Districts

Chapter 4: General Provisions for All Districts has been described as the UDO's "junk drawer" and includes a wide array of standards that apply to some or all districts.

Sections 4.2-4.7 are proposed to be relocated to other UDO Chapters. Despite the relocation of the majority of the Chapter, it is recommended that Chapter 4 be retained and that several sections of Chapter 6 and a subsection of Chapter 8 be relocated to it and several new sections be added. Further discussion with staff is necessary to determine which standards apply to all development and which apply to only subdivisions. Only those standards that apply to all development are recommended to be relocated to Chapter 4. It is recommended that subsection 8.5.4 Fences, Walls, and Berms be relocated to Chapter 4 and made into its own section. It is also recommended that section 8.8 Dumpster and Mechanical Utilities Screening be relocated to Chapter 4.



Additionally, it is recommended that the Town establish several new sections in Chapter 4 regarding retaining walls, conservation design, and multibuilding development standards. It is recommended that the new multibuilding development standards replace existing subsection 4.3.2 Number of Principal Buildings per Lot.

To reflect the proposed changes, it is recommended that the Town rename Chapter 4: General Development Standards.

Chapter 5: Building Design Standards

Chapter 5: Building Design Standards includes standards that regulate building siting, orientation, massing, and architecture for specific building types. To better reflect the types of standards included in Chapter 5, it is recommended that the Town rename Chapter 5: Building Design and Layout Standards. Further, it is recommended that the Town renumber Chapter 5: Building Design and Layout Standards to Chapter 6: Building Design and Layout Standards so that the UDO structure more accurately reflects the order in which the standards are referenced during the development process.

It is recommended that the Town add three new sections to Chapter 6 regarding two-over-two residential buildings, outlot/liner commercial buildings, and large lot commercial buildings. Additionally, the Town should consider establishing green building standards that could apply to all building types.

Chapter 6: Subdivision and Infrastructure Standards

Chapter 6: Subdivision and Infrastructure Standards includes regulations pertinent to the subdivision of land as well as to required infrastructure improvements.

It is recommended that Chapter 6 include only regulations pertinent to the subdivision of land and that regulations that apply to site specific development be relocated to other topic specific Chapters of the UDO. To reflect this change, it is recommended that the Town rename Chapter 6: Subdivision Standards. Further, it is recommended that the Town renumber Chapter 6: Subdivision Standards to Chapter 5: Subdivision Standards so that the UDO structure more accurately reflects the order in which the standards are referenced during the development process.

Regulations pertinent to the subdivision of land located in other Chapters should be consolidated in Chapter 5 including section 4.3 Basic Lot and Use Standards (with the exception of subsection 4.3.4 Encroachments).

It is also recommended that the Town eliminate the detailed cross sections from Chapter 5 and instead refer to the cross sections included in the Comprehensive Transportation Plan, as amended.

The final contents of Chapter 5 will be determined in coordination with the MSSD update.

Chapter 7: Recreation Facility Fees, Parks, and Open Space Land

Chapter 7: Recreation Facility Fees, Parks, and Open Space Land includes regulations pertaining to the preservation of open space, provision of parkland, and applicability of recreation facility fees. Since all fees are located in the fee schedule outside of the UDO, it is recommended that the Town rename Chapter 7: Parks and Open Space Standards.

No major changes are proposed to the structure of Chapter 7.

Chapter 8: Tree Protection, Buffers, and Landscaping

Chapter 8: Tree Protection, Buffers, and Landscaping includes standards that regulate the tree preservation and require a minimum amount of buffering between uses and on-site landscaping. It is recommended that the Town rename Chapter 8: Tree Preservation, Landscaping, and Buffer Standards.

Subsection 8.5.4 Fences, Walls, and Berms and section 8.8 Dumpster and Mechanical Utilities Screening are proposed to be relocated to Chapter 4, as detailed above. No other major changes are proposed to the structure of Chapter 8.



Chapter 9: Parking and Driveways

Chapter 9: Parking and Driveways includes regulations that pertain broadly to access and circulation and is therefore proposed to be renamed to Chapter 9: Access and Mobility Standards.

It is recommended that the Town relocate all access and mobility standards to this chapter including but not limited to Section 6.6 Implementation of Transportation Plan and Town Street Classifications and 6.11 Transportation Impact Analysis.

Additionally, it is recommended that the Town establish a new sections in Chapter 9 regarding on-site pedestrian walkways and required off-site pedestrian connections as well as sight distance triangles.

No other major changes are proposed to the structure of Chapter 9.

Chapter 10: Lighting

Chapter 10: Lighting includes standards pertaining to outdoor lighting throughout the Town.

No major changes are proposed to the structure of Chapter 10.

Chapter 11: Signs

Chapter 11: Signs includes standards pertaining to the allowed number, location, and size of permanent and temporary signs in the Town. To streamline the name of the chapter with other chapters of the UDO it is recommended that the town rename Chapter 11: Sign Standards. Further, it is recommended that the Town renumber Chapter 11: Sign Standards to Chapter 12: Sign Standards so that the UDO structure more accurately reflects the order in which the standards are referenced during the development process.

Chapter 12: Signs is proposed to be fully replaced. The structure of the new standards is proposed to include the following sections:

1. Purpose, Authority, and Findings
2. Limit on Sign Area and Sign Copy
3. Sign Measurement
4. Permitted and Allowed Sign Types by District
5. General Sign Standards
6. Permanent Sign Standards
7. Temporary Sign Standards
8. Sign Plans
9. Prohibited Signs and Content
10. Safety, Maintenance, and Abandonment

Chapter 12: Erosion, Flood, Stormwater, and Watershed Standards

Chapter 12: Erosion, Flood, Stormwater, and Watershed Standards includes the regulations pertinent to natural resource protection throughout the Town. To better reflect this, it is recommended that the Town rename Chapter 12: Natural Resource Protection Standards. Further, it is recommended that the Town renumber Chapter 12: Natural Resource Protection Standards to Chapter 11: Natural Resource Protection Standards so that the UDO structure more accurately reflects the order in which the standards are referenced during the development process.

It is recommended that section 6.4 Land Suitability be relocated to Chapter 11.

The final contents of Chapter 11 will be determined in coordination with the MSSD update.



Chapter 13: Nonconformities

Chapter 13: Nonconformities includes the standards pertinent to legally nonconforming lots, structures, and uses. It is recommended that the Town renumber Chapter 13: Nonconformities to Chapter 14: Nonconformities so that the UDO structure more accurately reflects the order in which the standards are referenced during the development process.

Section 13.5 Nonconforming Uses and Structures is proposed to be separated out into two separate sections, one regulating nonconforming uses and the other regulating nonconforming structures.

A new Chapter 13: Performance and Maintenance is proposed to be established.

It is recommended that the Town relocate sections 6.12: Improvement Guarantees and Performance Securities, 6.13: Provision of Services and Acceptance by Town, and 6.14: Ownership and Maintenance of Common Areas to the new Chapter 13: Performance and Maintenance.

Chapter 14: Administrative Agencies

Chapter 14: Administrative Agencies includes information regarding the various parties responsible for the administration of the UDO. The contents of Chapter 14: Administrative Agencies is proposed to be consolidated with Chapter 15: Administration. Chapter 14 is proposed to be reutilized as Chapter 14: Nonconformities.

Chapter 15: Administration

Chapter 15: Administration includes the information regarding the various processes and procedures for UDO compliance.

Since the contents of Chapter 14: Administrative Agencies is proposed to be consolidated with Chapter 15: Administration, it is recommended that the Town rename Chapter 15: Administrative Standards.

Chapter 16: Enforcement

Chapter 16: Enforcement includes the standards pertinent to the enforcement of the UDO regulations.

No major changes are proposed to the structure of Chapter 16.

Chapter 17: Definitions

Chapter 17: Definitions includes regulations that pertain to both definitions and interpretations and is therefore proposed to be renamed to Chapter 17: Definitions and Interpretations.

Section 17.3 establishes use definitions, while Section 17.4 establishes non-use definitions. It is recommended that the Town consolidate these sections.

All definitions located outside of Chapter 17 are proposed to be relocated to this chapter. Section 4.2 Interpretation of Numerical Standards, 4.4 Irregular Lot Setbacks, as well as Section 4.5 Measurement of Height are proposed to be relocated to Chapter 17 as they apply to the interpretation of the full UDO.



Proposed UDO Chapters

Below is a list of the proposed UDO chapters.

1. Purpose and Applicability
2. Zoning Districts
3. Use Standards
4. General Development Standards
5. Subdivision Standards
6. Building Design and Layout Standards
7. Parks and Open Space Standards
8. Tree Preservation, Landscaping, and Buffer Standards
9. Access and Mobility Standards
10. Lighting Standards
11. Natural Resource Protection Standards
12. Sign Standards
13. Performance and Maintenance
14. Nonconformities
15. Administrative Standards
16. Enforcement
17. Definitions

ONLINE QUESTIONNAIRE RESULTS SUMMARY

The summary of the results of the online questionnaire are included in the following pages.

Wake Forest Unified Development Ordinance Comprehensive Update

Community Survey
08.01.2022 - 09.02.2022

WAKE FOREST

UDO

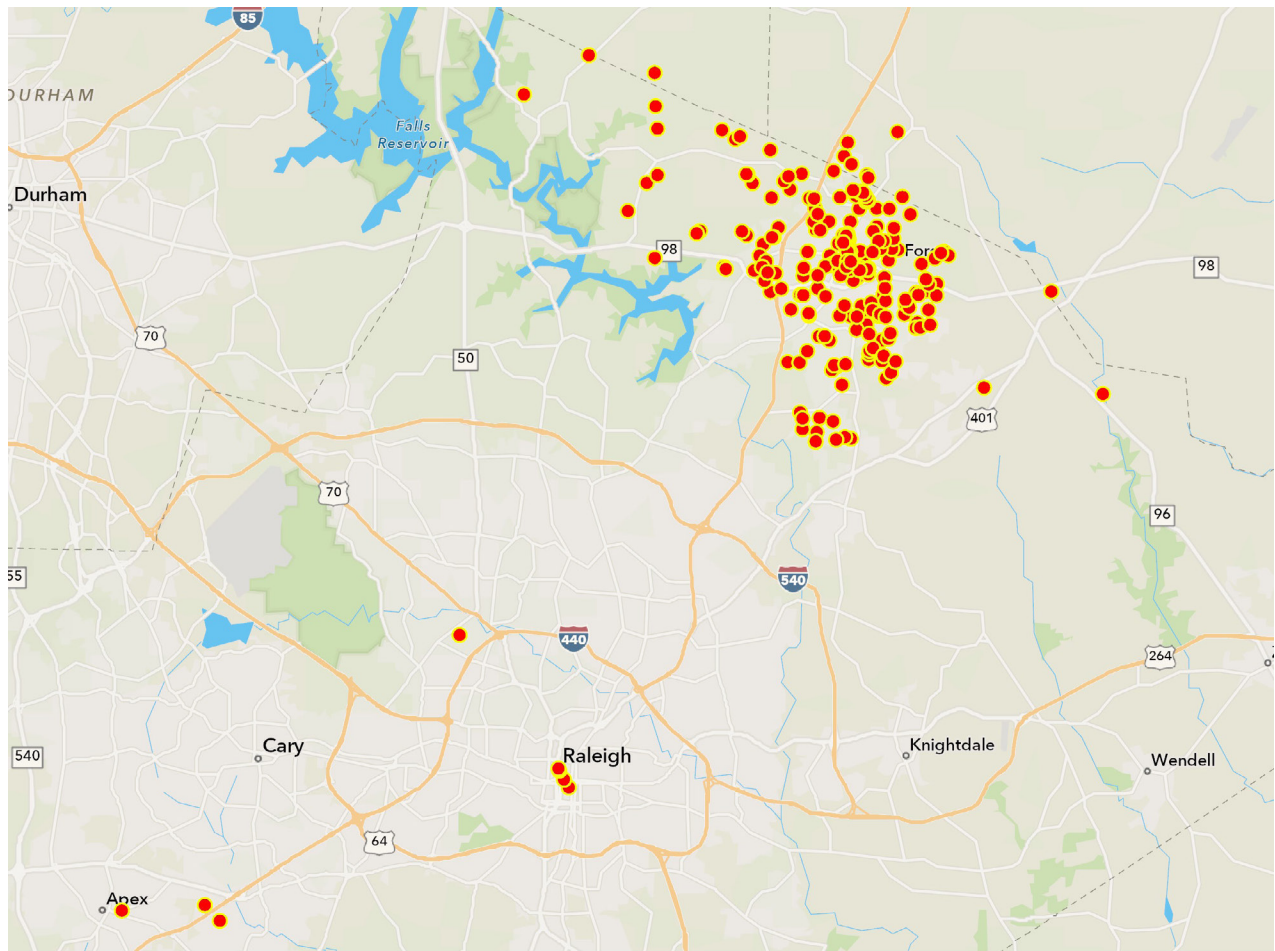
comprehensive
update

from *IDEAS* to *IMPLEMENTATION*

-
- 4** Multifamily & Non-Residential Building Design
 - 10** Street Lighting Preferences
 - 14** Non-Automobile Transportation Options
 - 16** Vehicular Parking Options
 - 21** Open Space
 - 26** Sustainability Measures
 - 28** Demographics Questions

Participants were asked to drop a point on an interactive map to indicate where they live or work. This question was not required.

Where do you work/live?

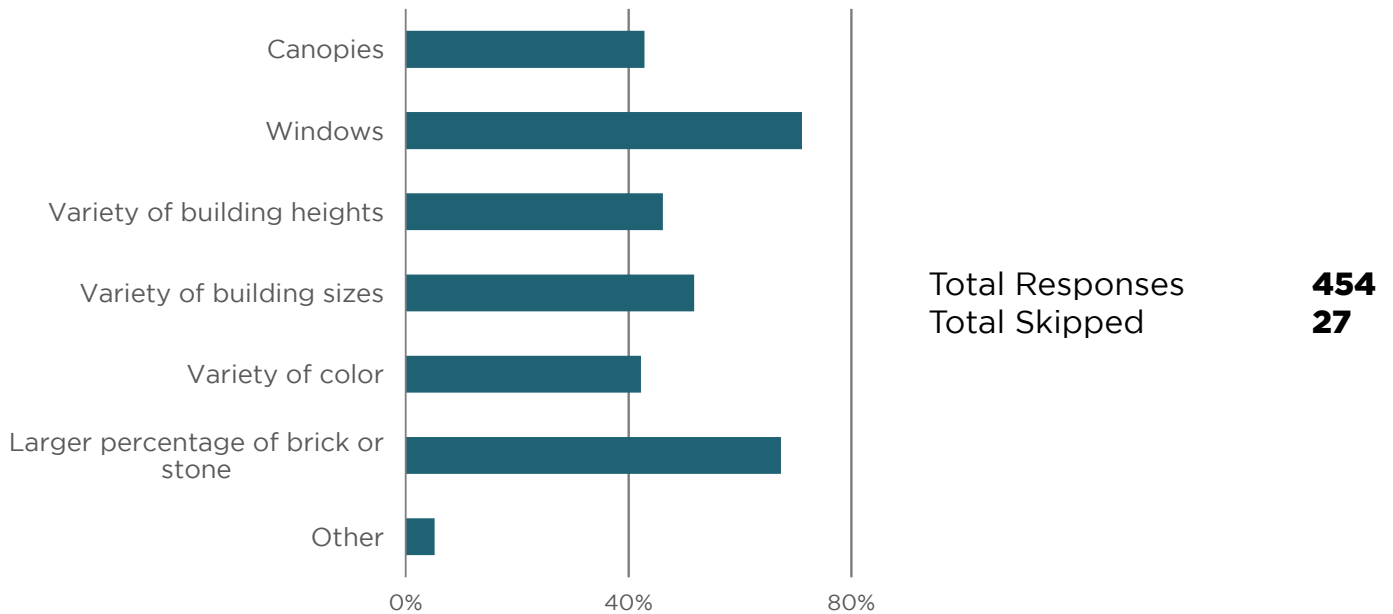


Total Responses	349
Total Skipped	132

Multifamily & Non-Residential Building Design

The UDO regulates the exterior design of buildings. Under state statute, the Town cannot regulate the design of single family, duplex, and townhome buildings; however, the Town can regulate the design of multifamily and non-residential buildings.

For commercial buildings in Wake Forest, select the architectural features you like (may select multiple or none)

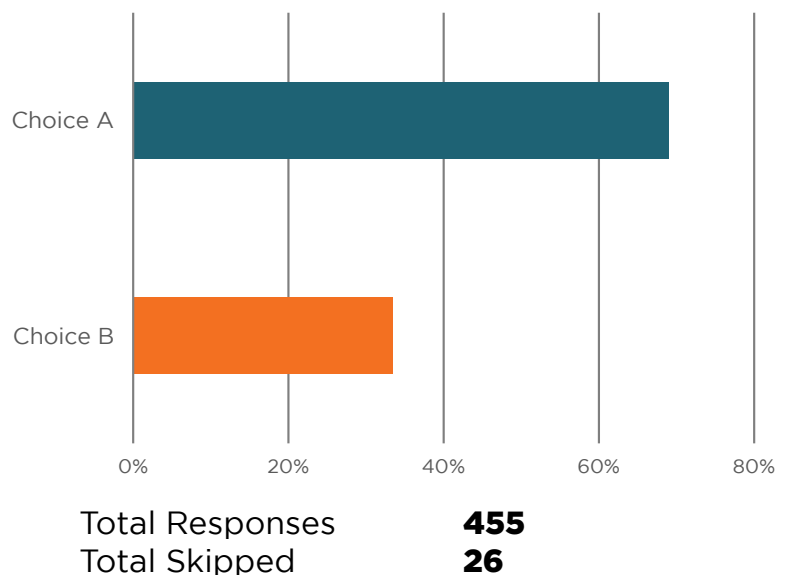


Choice A



Choice B

For single user commercial buildings, select which design(s) you like from the examples pictured on the left (may select multiple or none)



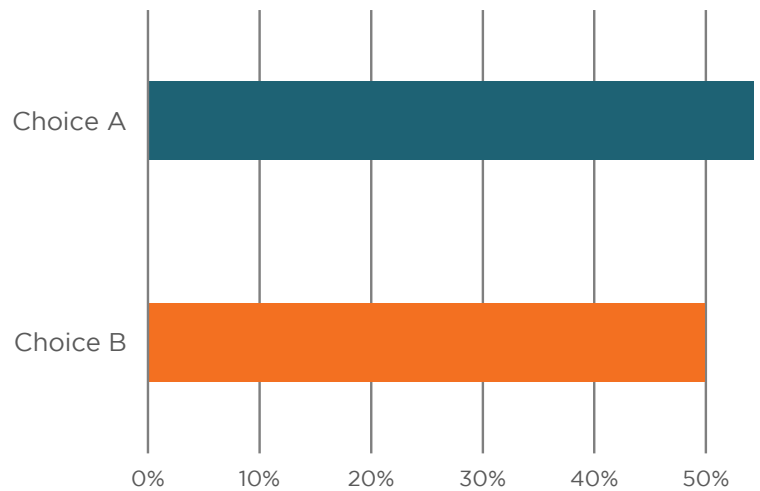


Choice A



Choice B

For multi-tenant retail buildings, select which design(s) you like from the examples pictured on the left (may select multiple or none)



Total Responses **458**

Total Skipped **23**

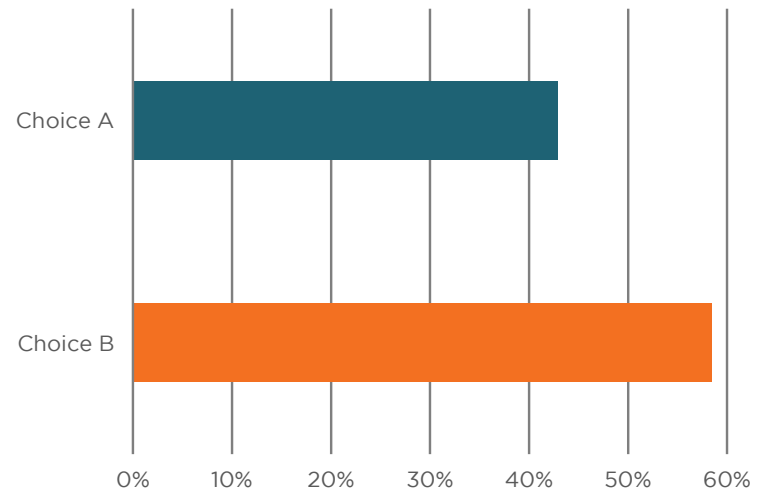


Choice A



Choice B

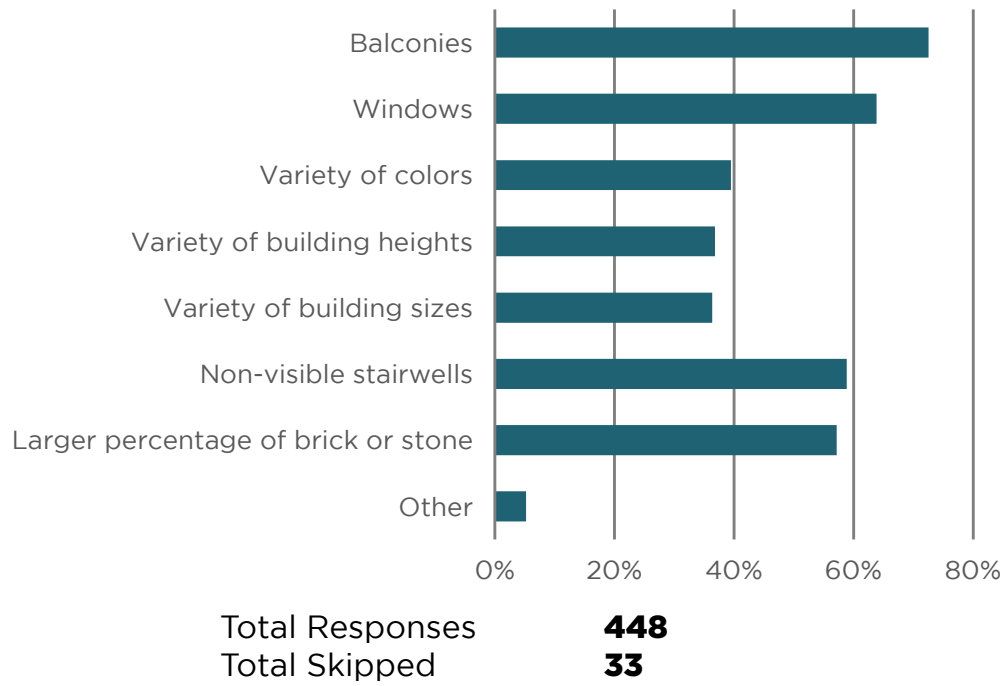
For office/service buildings, select which design(s) you like from the examples pictured on the left (may select multiple or none)



Total Responses **459**

Total Skipped **22**

For multifamily buildings in Wake Forest, select the architectural features you like (may select multiple or none)





Choice A



Choice B

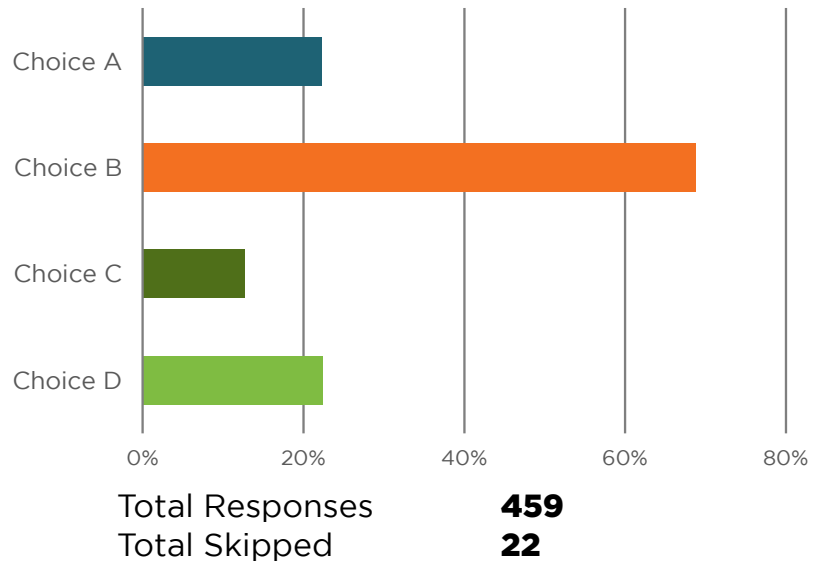


Choice C



Choice D

For multifamily buildings, select which design(s) you like from the examples pictured on the left (may select multiple or none)





Choice A

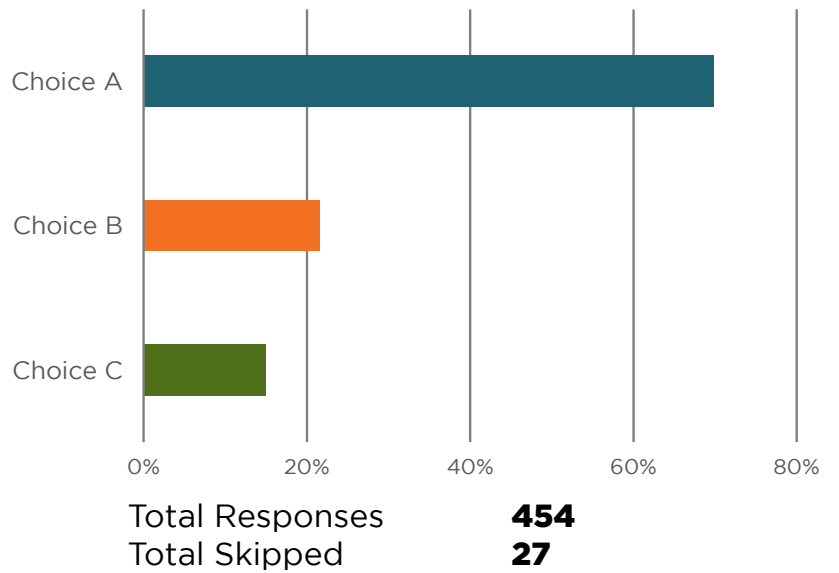


Choice B



Choice C

For smaller scale multifamily buildings, select which design(s) you like from the examples pictured on the left (may select multiple or none)

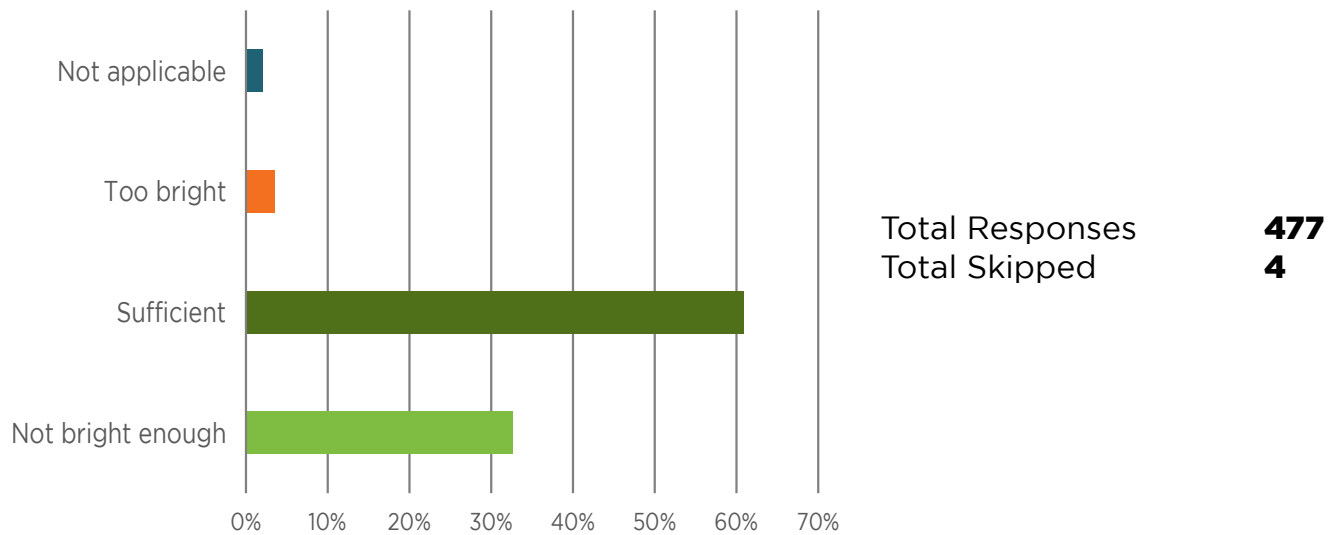


Street Lighting Preferences

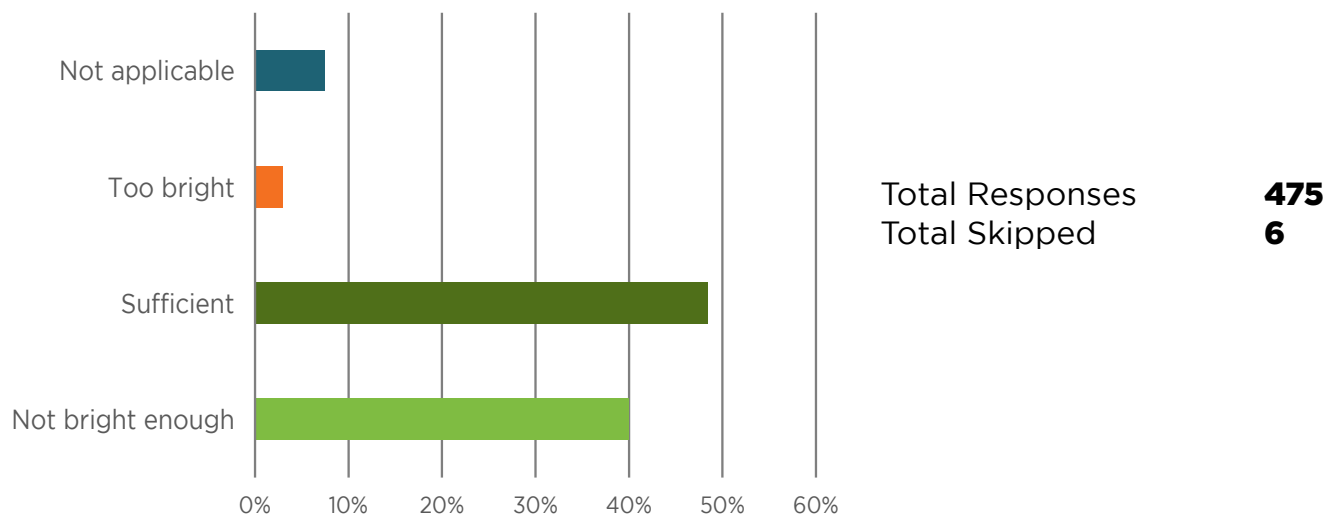


The UDO regulates street lighting and site lighting. In your experience:

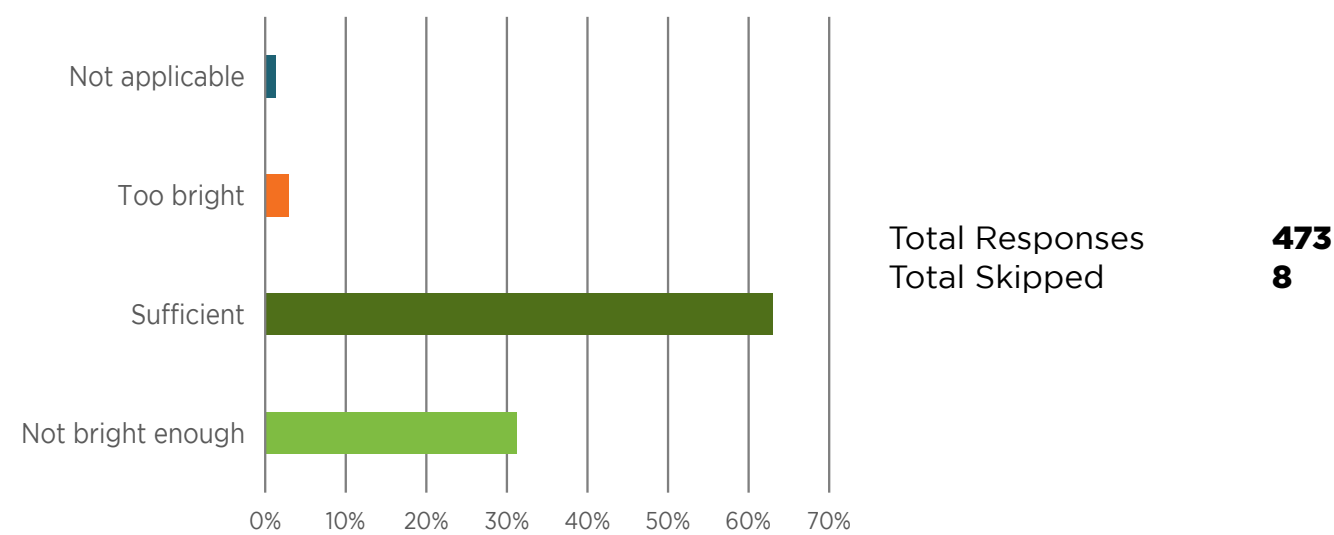
When driving on residential streets, do you feel the street lighting is...



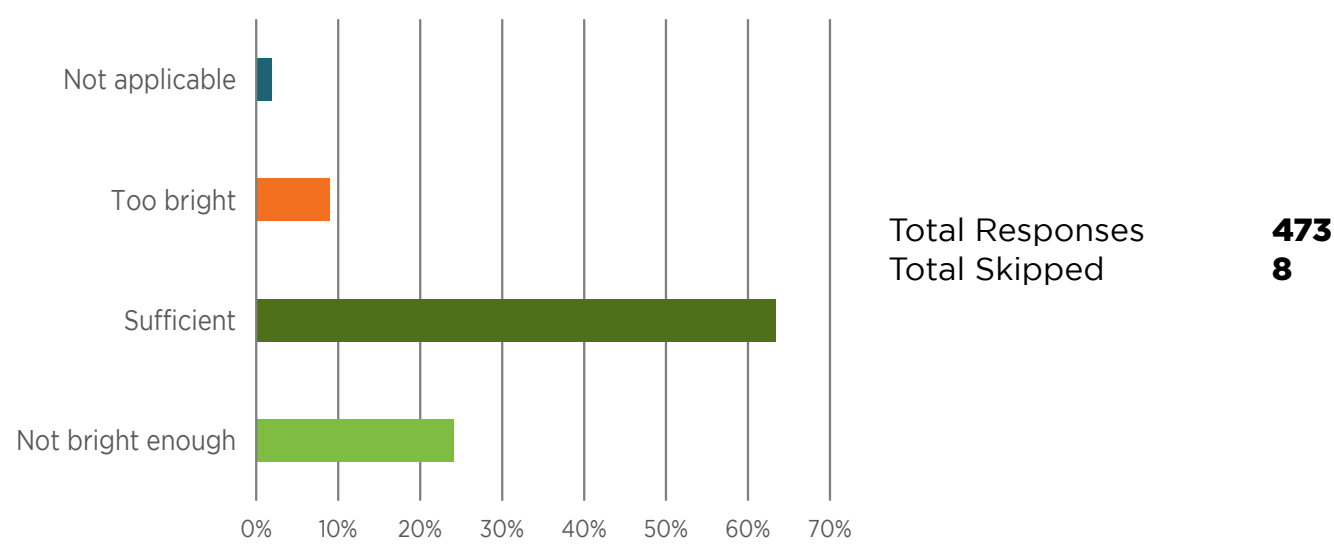
When walking or biking on residential streets, do you feel the street lighting is...



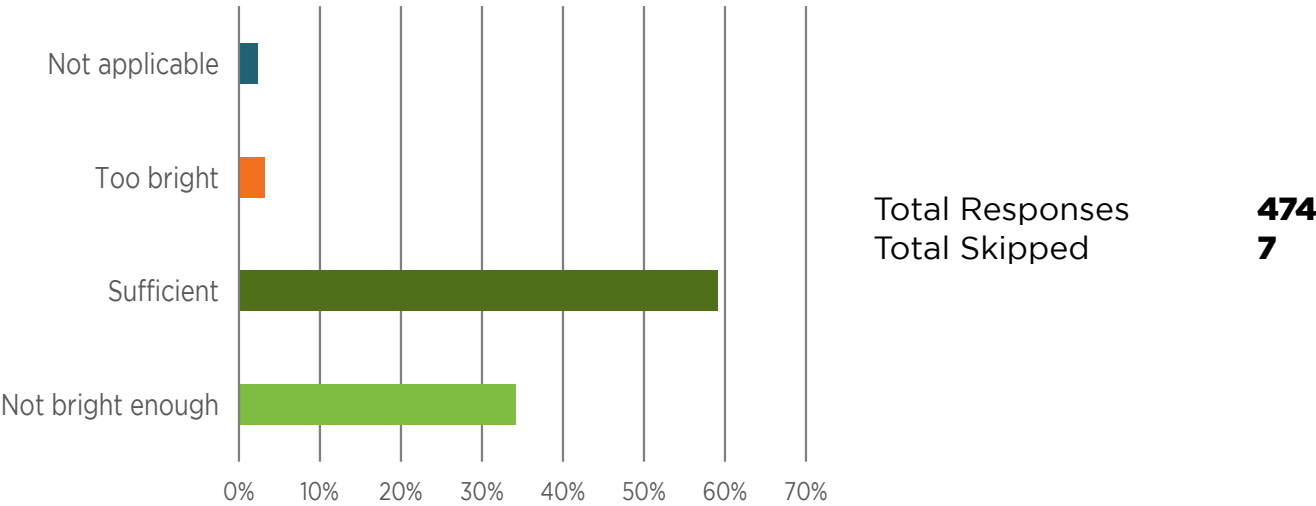
When driving on larger streets, do you feel the street lighting is...



When driving by commercial area parking lots, do you feel the site lighting is...

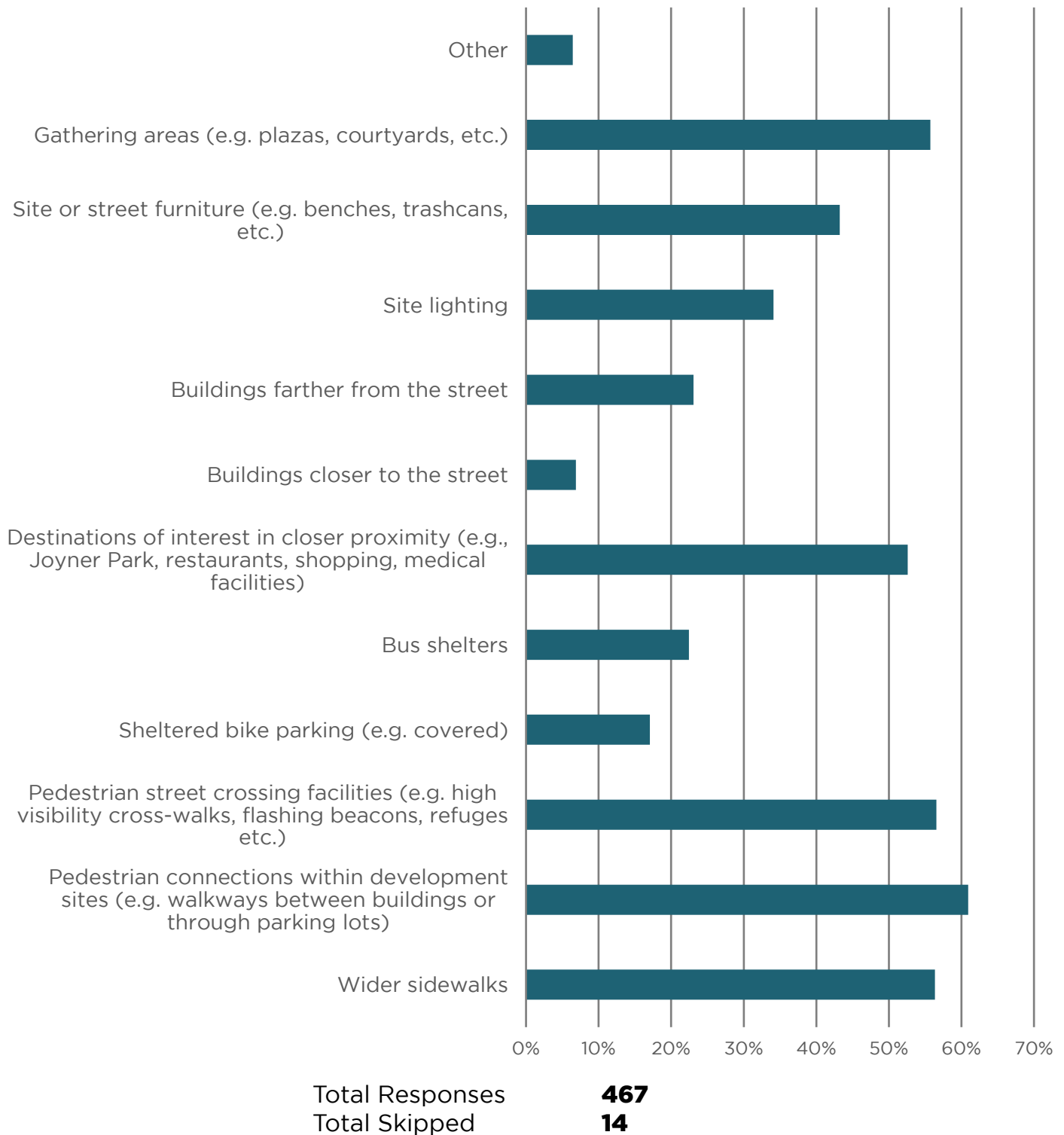


When walking in parking lots, do you feel the site lighting is...



Non-Automobile Transportation Options

Thinking about non-automobile transportation options (e.g. walking, biking, bus etc.), select which types of infrastructure or facilities and conditions would make you more likely to utilize non-automobile transportation options (may select multiple or none):

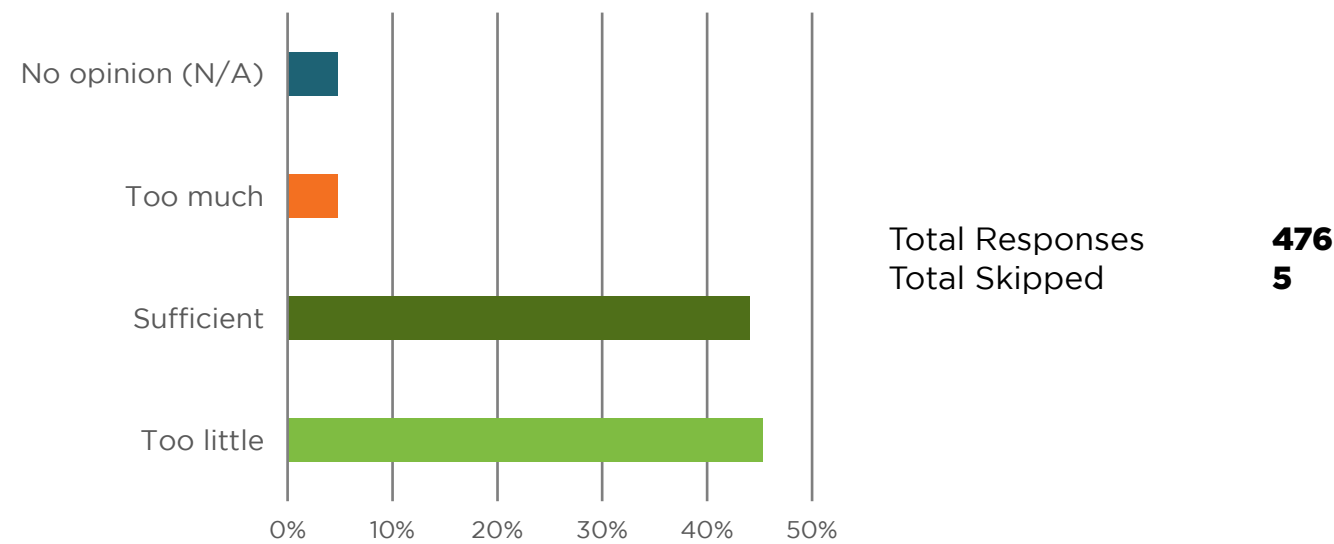


Vehicular Parking Options

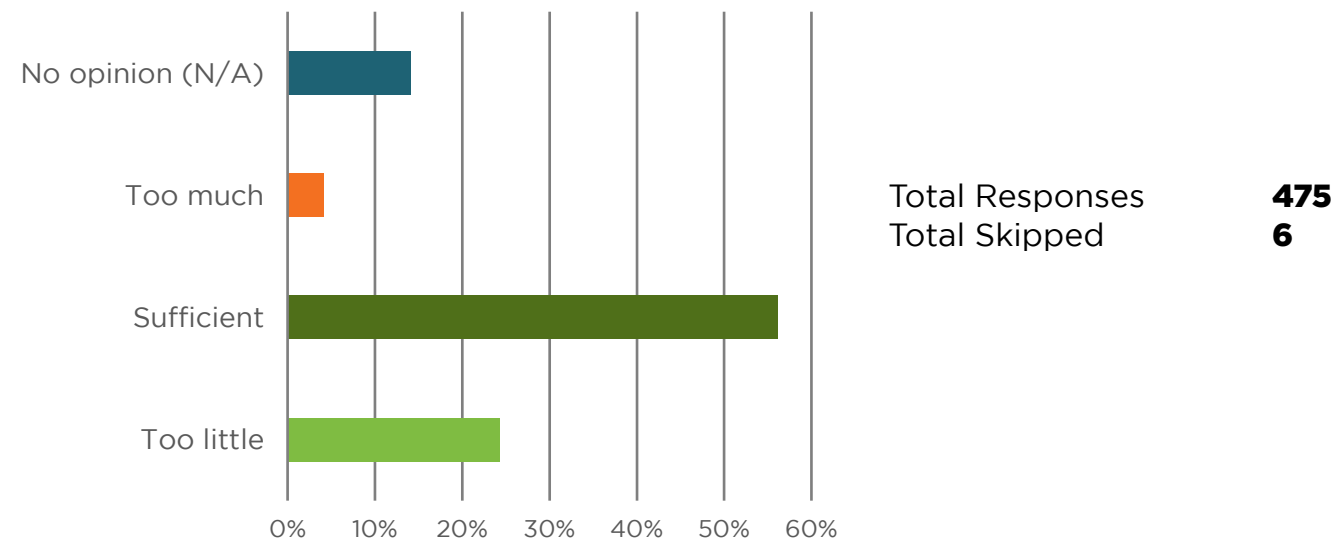


Thinking about vehicle parking options in Wake Forest, in your experience:

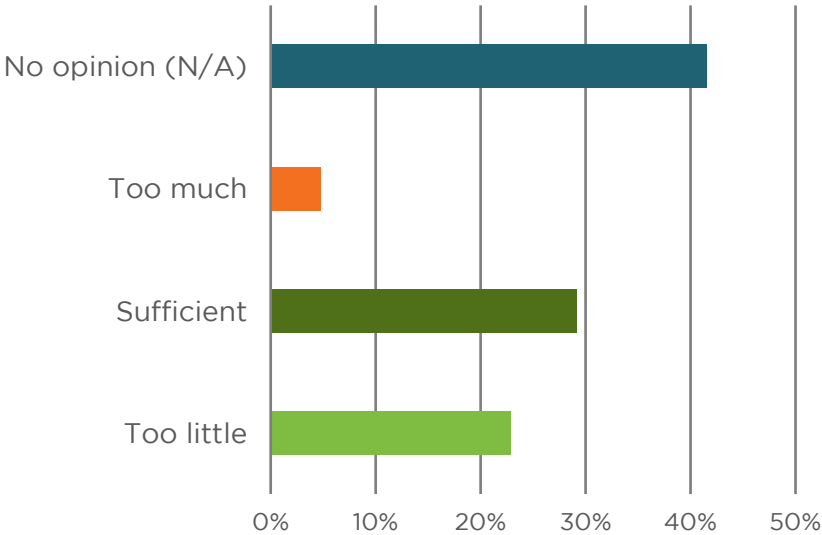
Is the amount of off-street parking (number of parking spaces in a parking lot) for restaurant and retail uses...



Is the amount of off-street parking (number of parking spaces in a parking lot) for office uses...

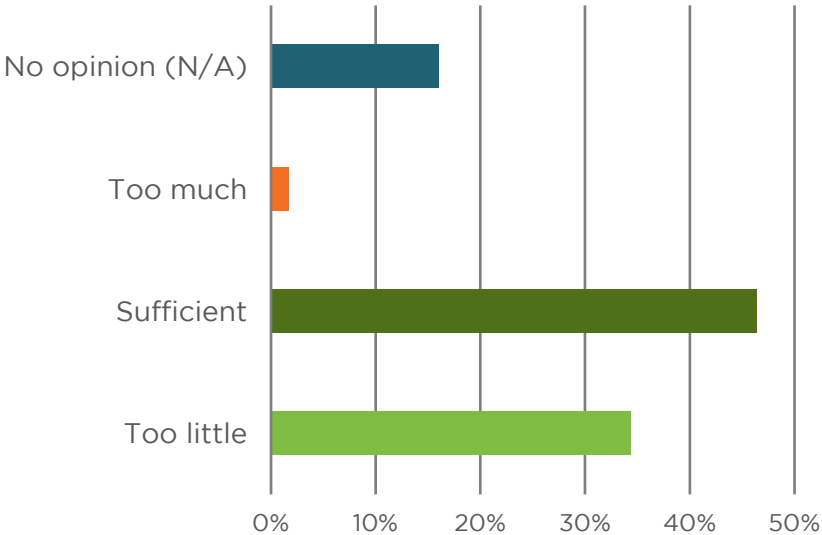


Is the amount of off-street parking (number of parking spaces in a parking lot) for multifamily (apartments and condominiums) uses...



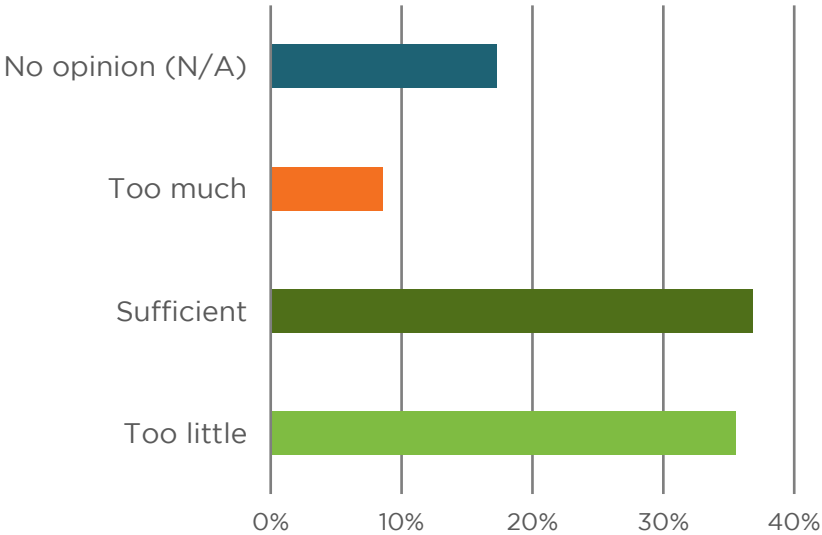
Total Responses 473
Total Skipped 8

Is the amount of off-street parking (e.g. driveway, garage, or parking lot) for single family and townhome uses...



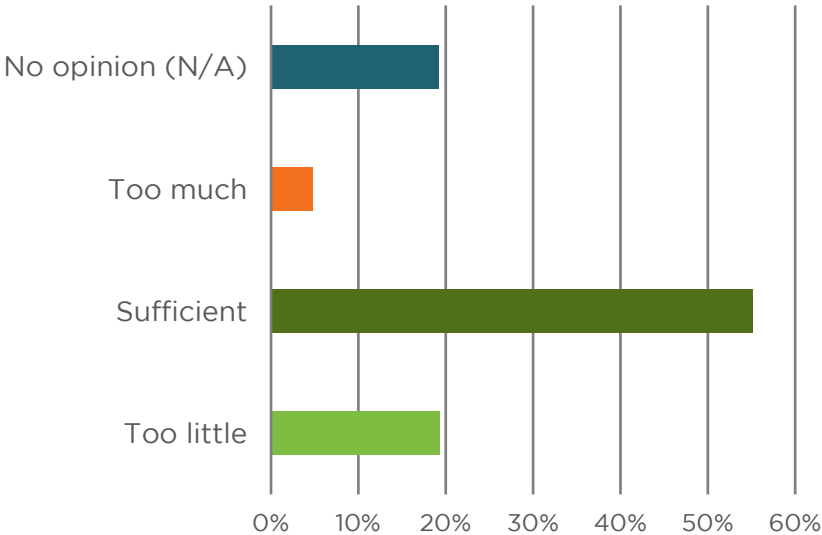
Total Responses 473
Total Skipped 8

Is the amount of on-street parking for single family and townhome uses...



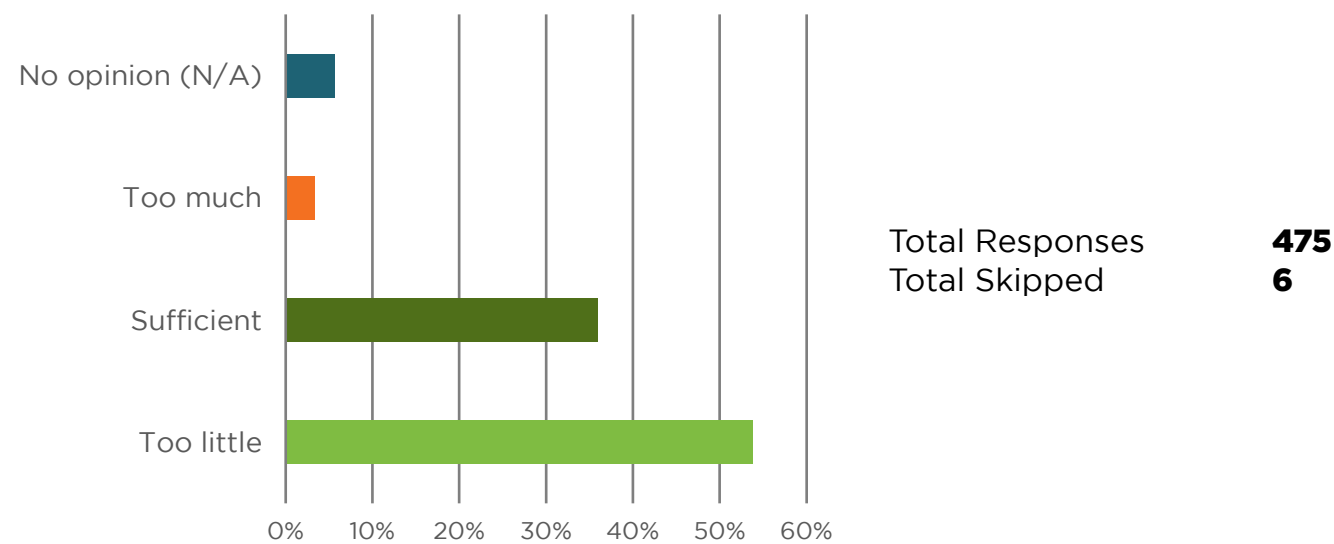
Total Responses 472
Total Skipped 9

Is the amount of off-street parking (number of parking spaces in a parking lot) for civic and institutional uses (e.g. place of worship, school etc.)...

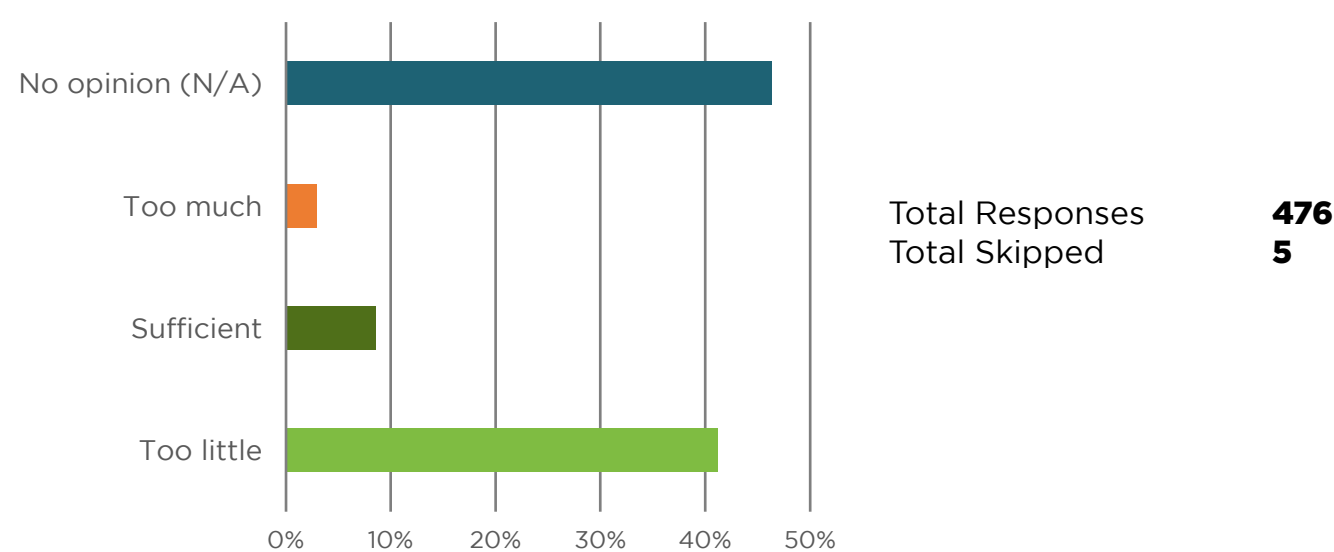


Total Responses 473
Total Skipped 8

Is the amount of landscaping within parking lots (trees, shrubs, plants)...



Is the availability of electric vehicle charging stations...

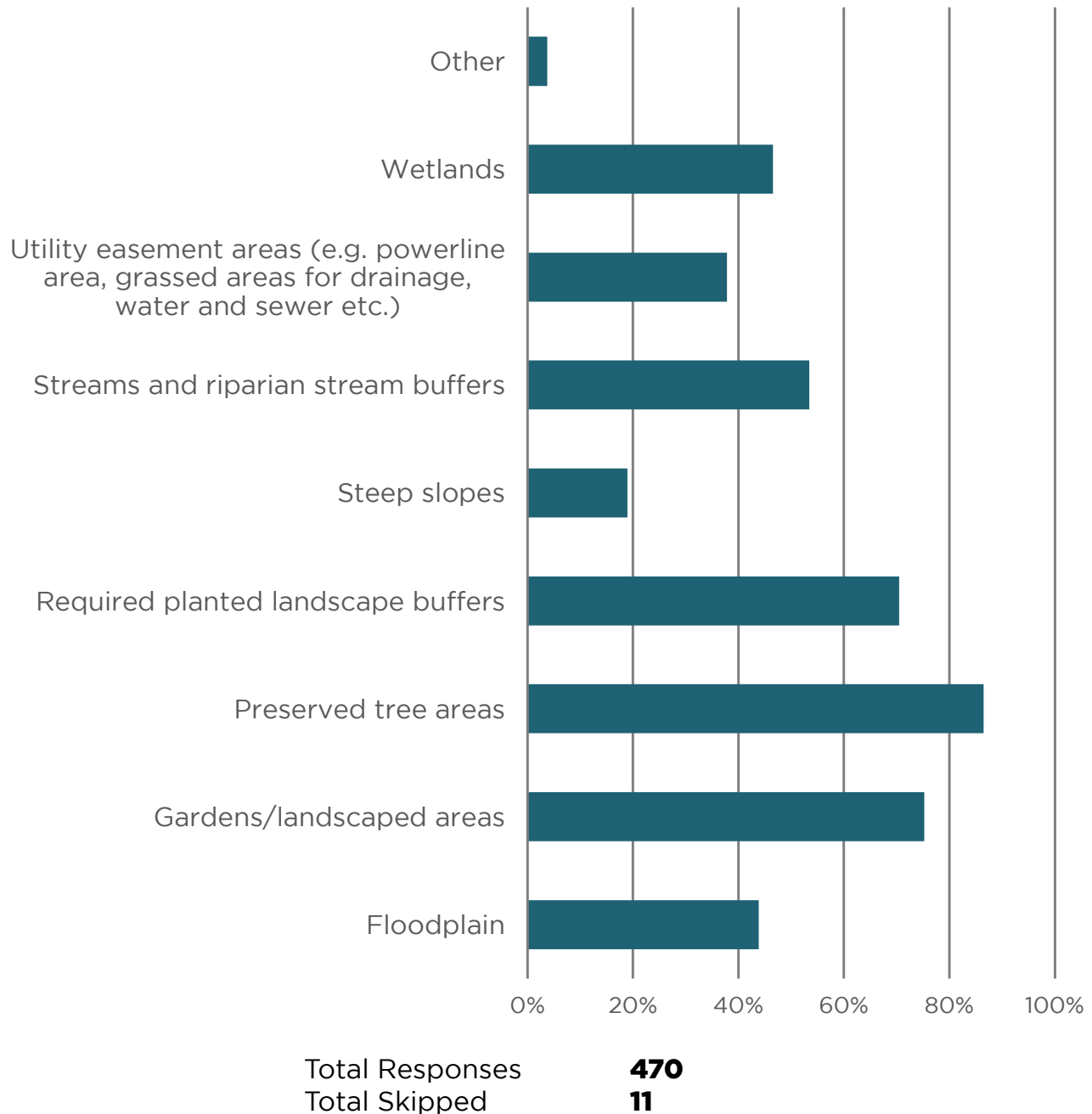


Open Space

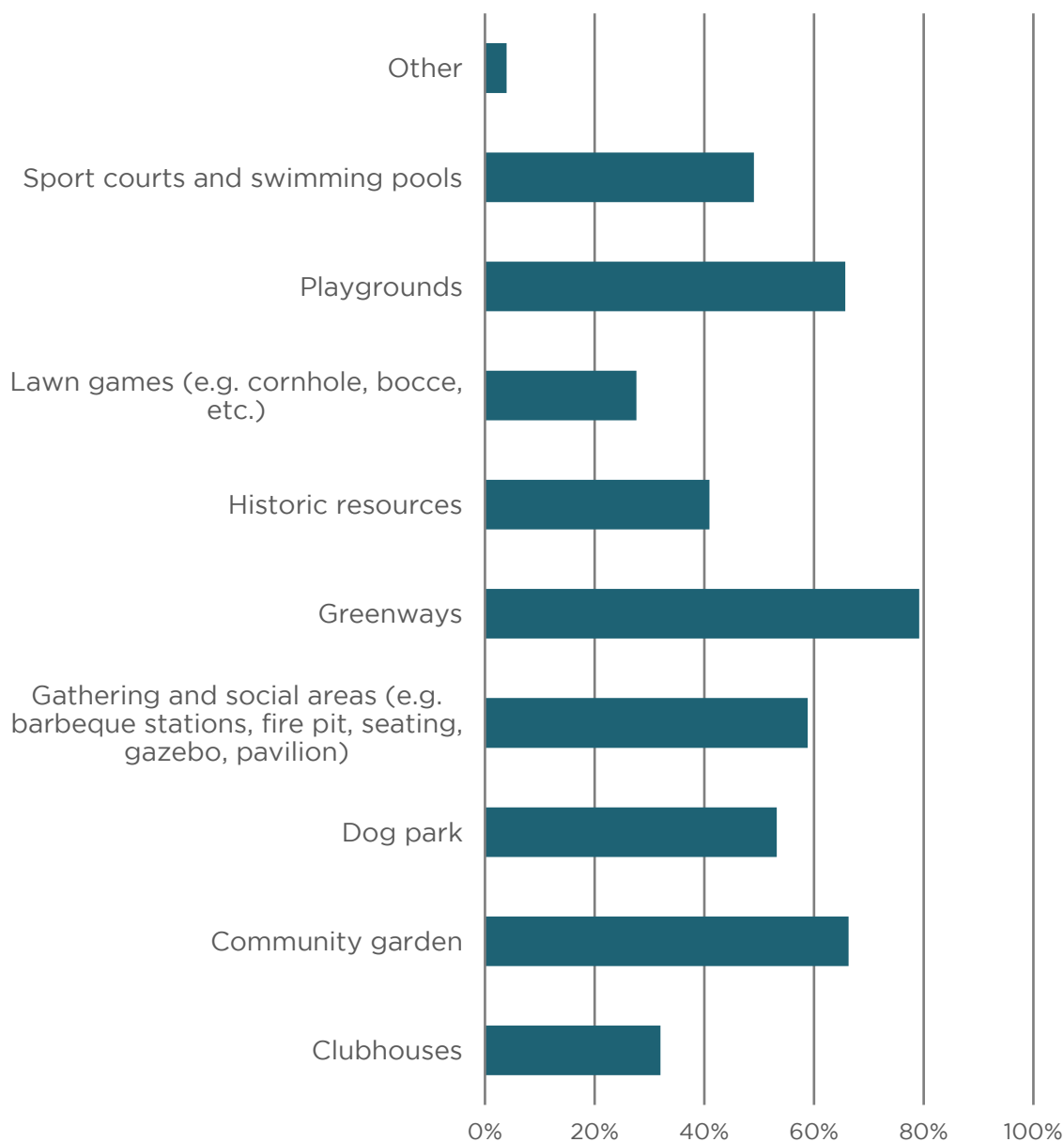


The UDO regulates the amount of required open space for new development.

Thinking about residential passive open space, what types of areas and features should be credited (count towards requirements)?

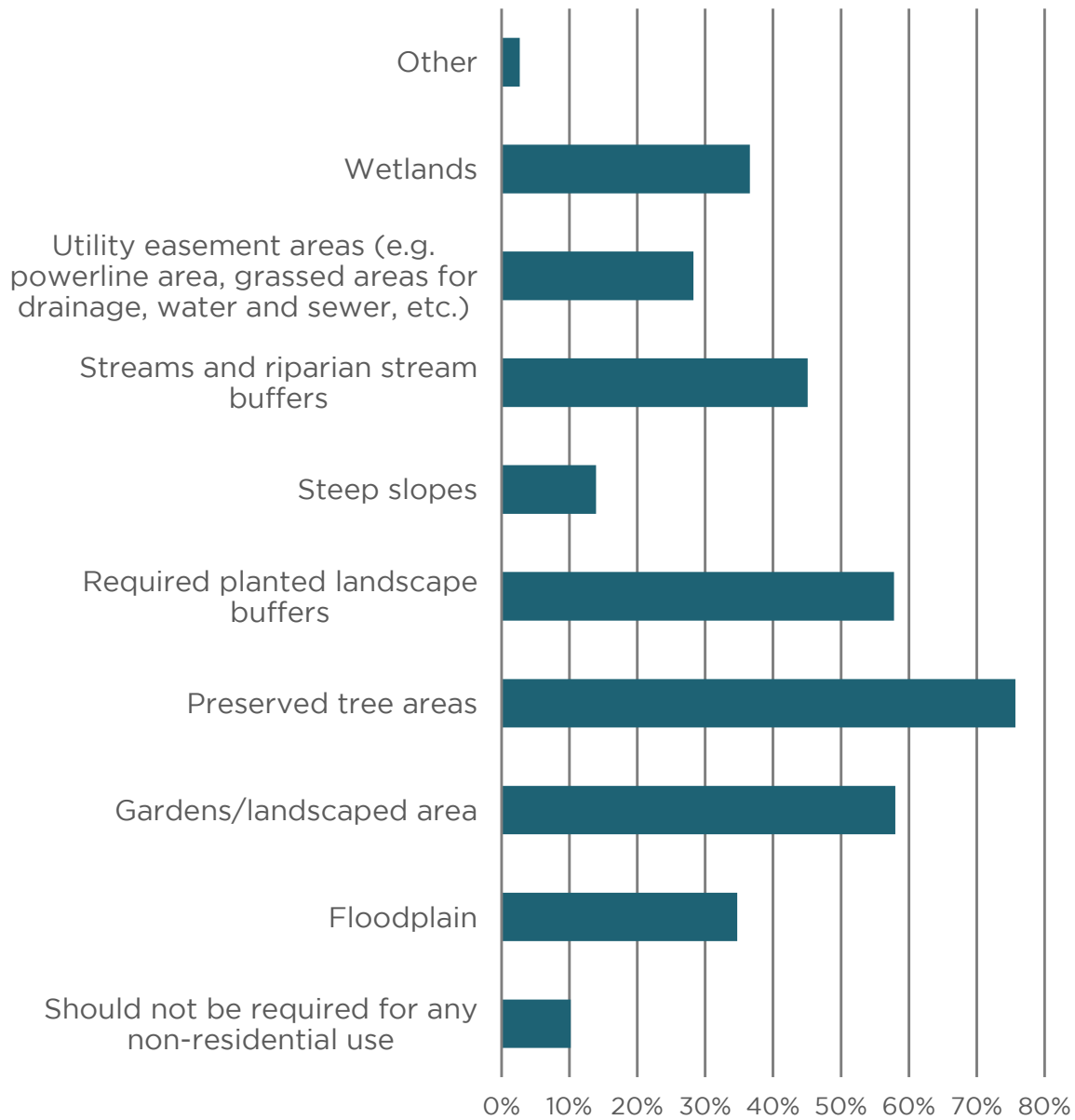


Thinking about residential active open space, what types of features should be credited (count towards requirements)?



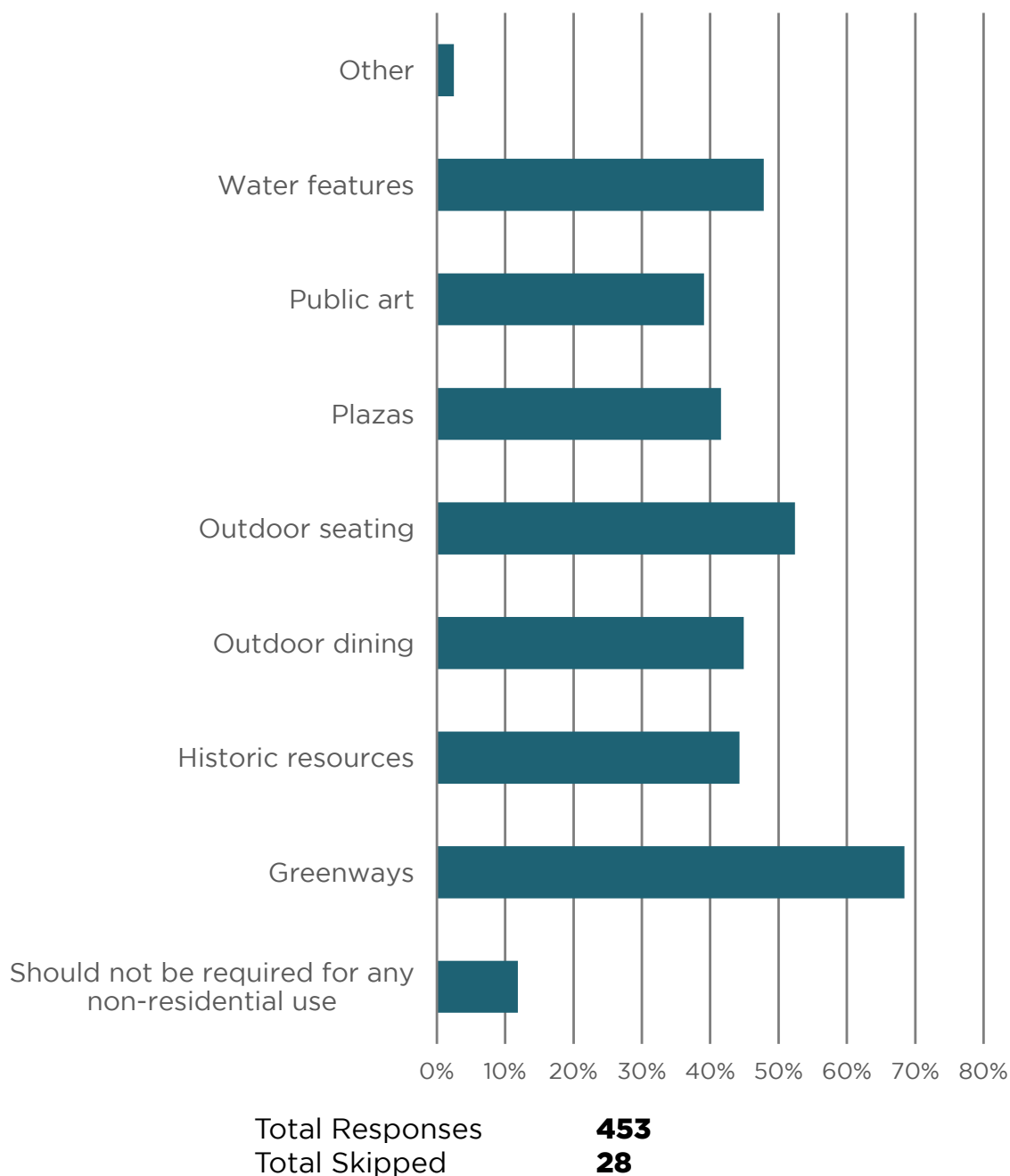
Total Responses **467**
Total Skipped **14**

Thinking about non-residential passive open space, what types of features should be credited (count towards requirements)?



Total Responses **450**
Total Skipped **31**

Thinking about non-residential active open space, what types of features should be credited (count towards requirements)?



Sustainability Measures



UDOs can incorporate measures that promote sustainability. Sometimes these features are required in developments, and in other cases, these features are incentivized or encouraged. Some of these features cannot be required due to State statutory limitations. Please rank the following sustainability measures in order of importance for new development and redevelopment.

Rank	Answers	1st choice	2nd choice	3rd choice	4th choice	5th choice	6th choice	Average Score
1	Tree preservation on sites with existing tree cover	58.02%	15.16%	8.57%	7.47%	6.59%	4.18%	4.98
2	Incorporating native plant species and pollinator plants into landscape plans	11.65%	30.11%	21.32%	13.19%	13.41%	10.33%	3.82
3	Incorporating rain gardens, bioswales, and other landscape options that help manage on-site stormwater	5.71%	18.68%	25.05%	24.84%	14.29%	11.43%	3.42
4	Incorporating renewable energy to the building or site design, for example, through the use of solar panels	13.85%	12.53%	15.16%	15.82%	22.20%	20.44%	3.19
5	Incorporating permeable surfaces (improved hard surfaces that allow water to flow through) in parking lots and driveways	7.69%	13.63%	18.46%	22.42%	18.46%	19.34%	3.12
6	Incorporating green roof systems (e.g. engineered, planted roof systems)	3.08%	9.89%	11.43%	16.26%	25.05%	34.29%	2.47

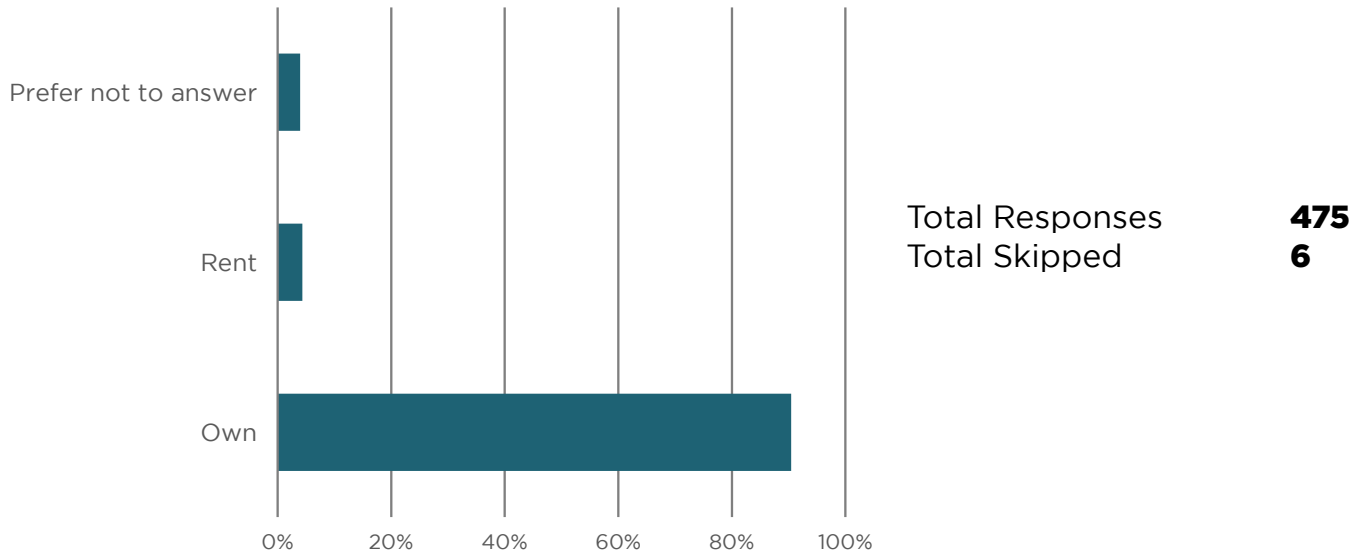
Total Responses **455**
Total Skipped **26**

Demographics Questions

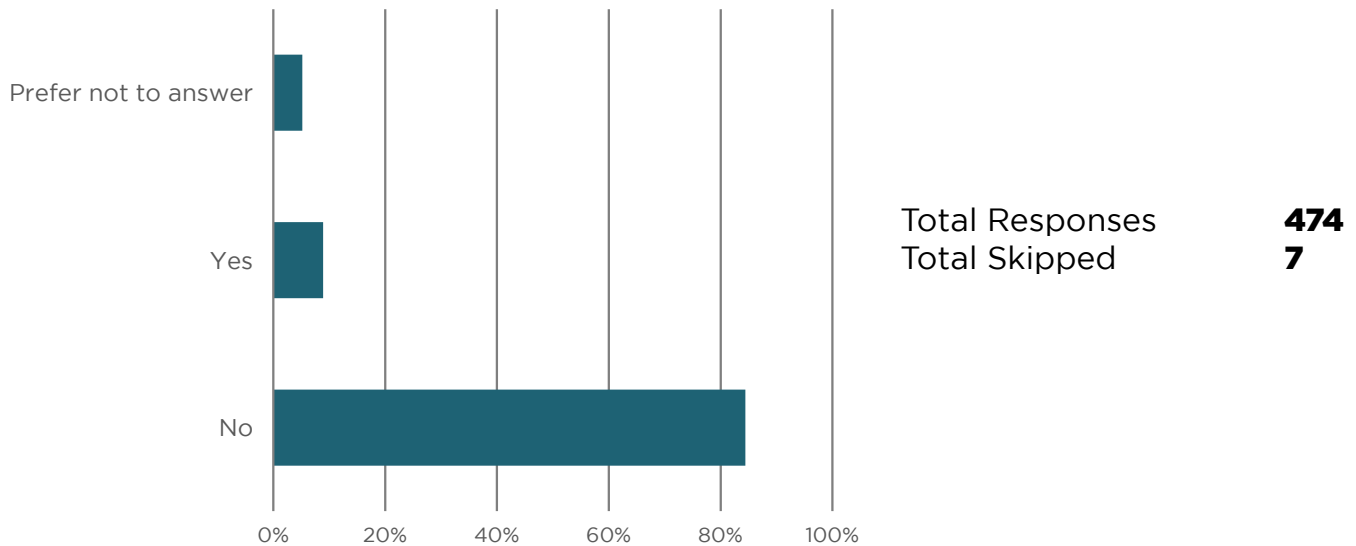


The following demographic questions are entirely voluntary but will assist the Town's understanding of the effectiveness of outreach efforts. The Town is committed to equitable outreach and would greatly appreciate your participation.

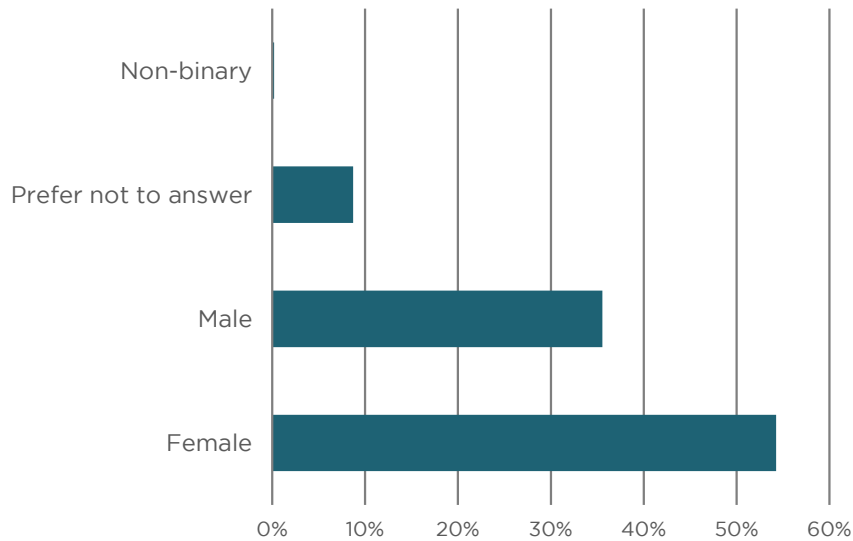
Select if you rent or own:



Do you have a disability?

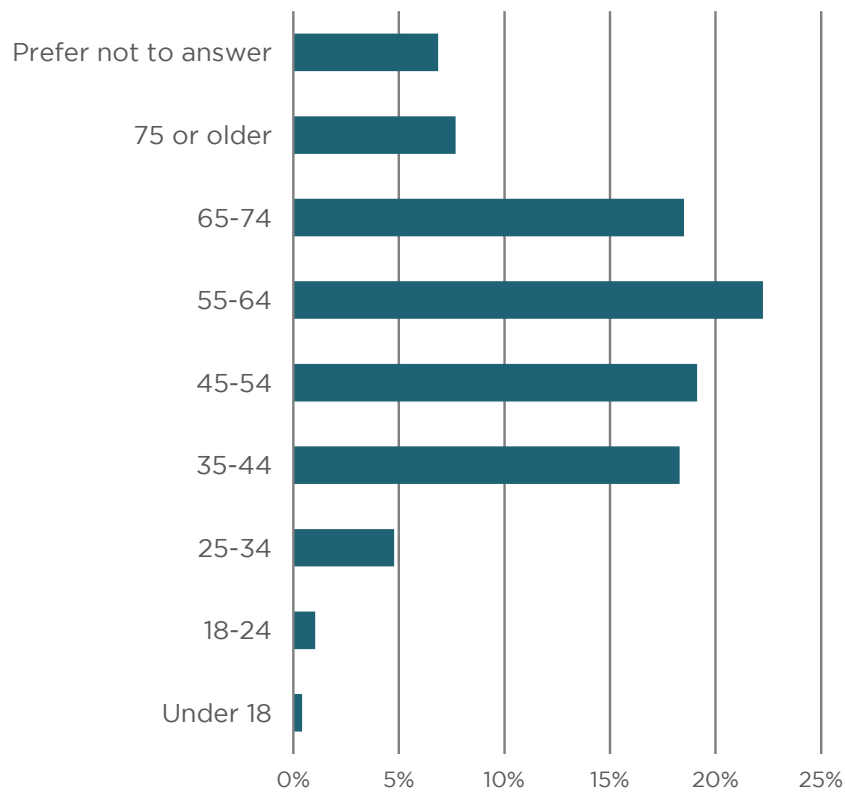


Select the gender you identify with:



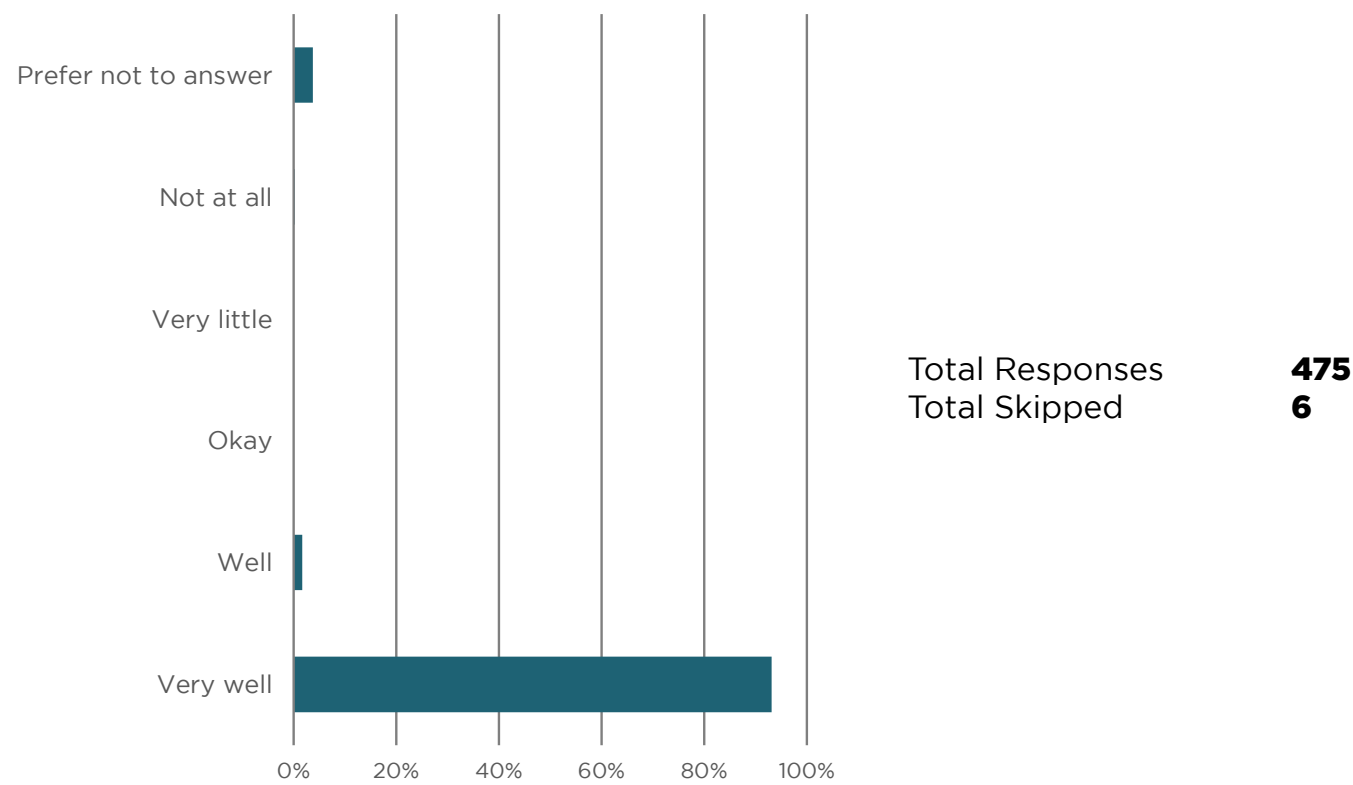
Total Responses **475**
Total Skipped **6**

Select your age:



Total Responses **476**
Total Skipped **5**

How well do you speak English?

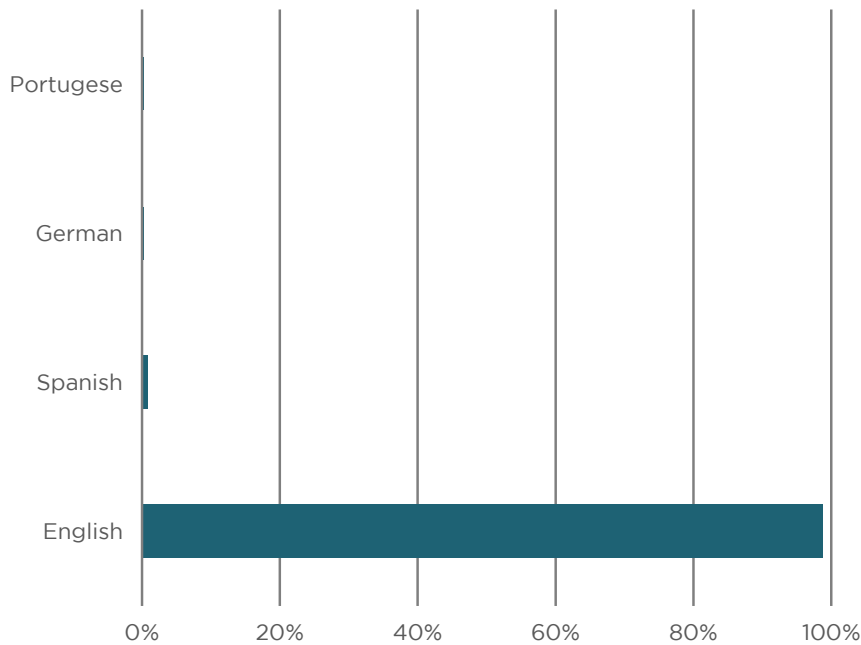


Which category describes you best?



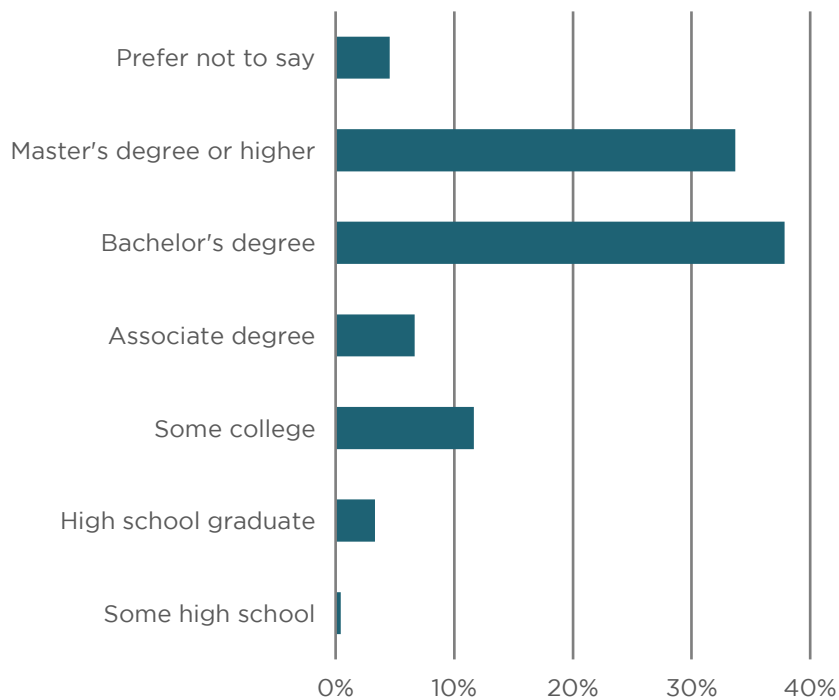
Total Responses **476**
Total Skipped **5**

What language do you speak at home?



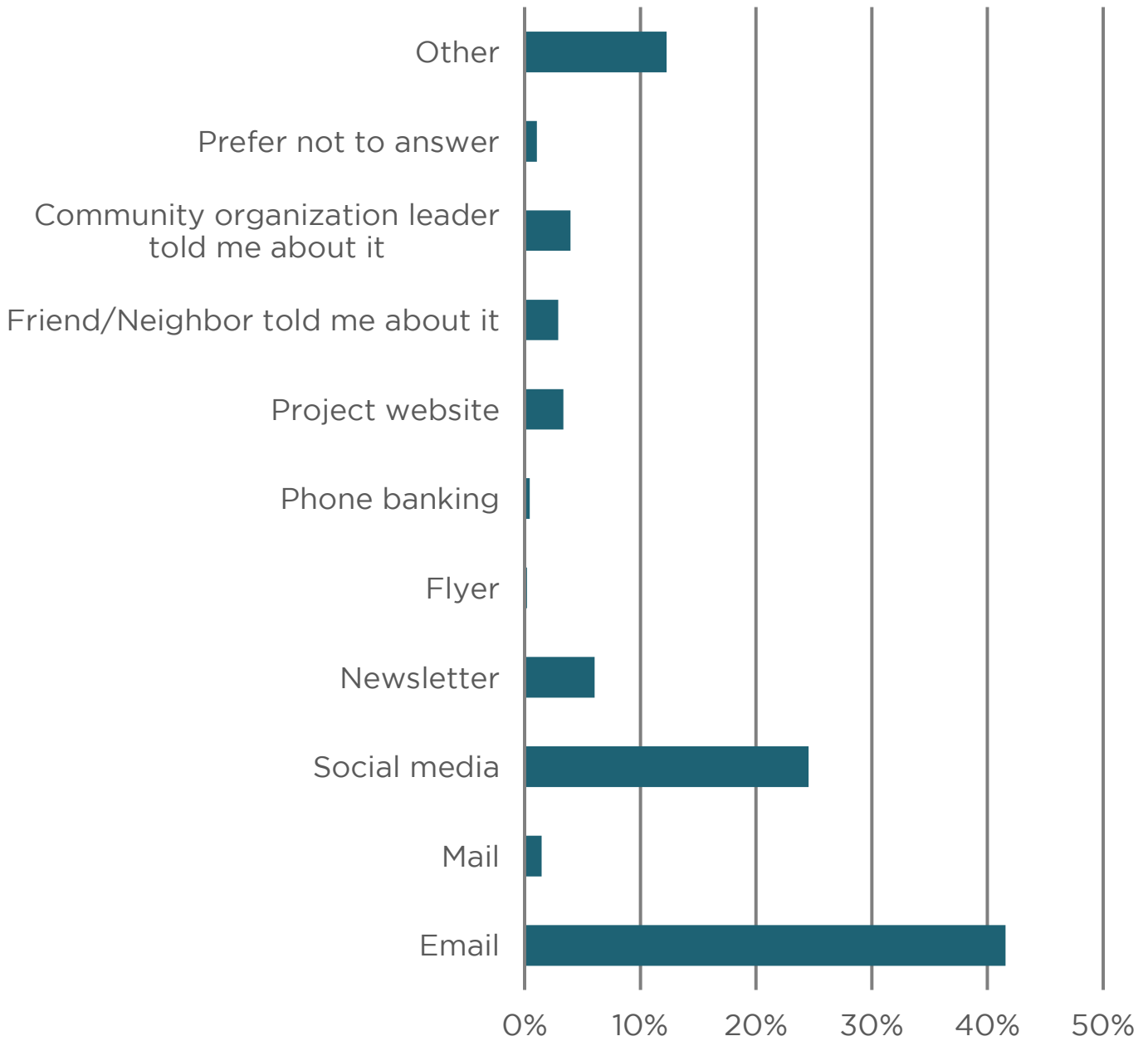
Total Responses **392**
Total Skipped **89**

Select your highest level of education attainment:



Total Responses **472**
Total Skipped **9**

How did you hear about this survey?



Total Responses **470**
Total Skipped **11**



Board of Commissioners Work Session Agenda Item Report

Agenda Item No.: 2021-663-
Submitted by: Courtney Tanner
Submitting Department: Planning
Meeting Date: October 4, 2022

SUBJECT

Wake Forest Public Transit Plan: Toole Design Group LLC (Consultant Team) Introduction and Project Kick-Off Presentation

Recommendation:

Item Summary:

ATTACHMENTS

- [Agenda Summary](#)

Agenda Item: Wake Forest Public Transit Plan: Toole Design Group LLC (Consultant Team)
Introduction and Project Kick-Off Presentation

Summary: The Town of Wake Forest began offering bus service in 2008 as a partnership between the City of Raleigh and the Town of Wake Forest, with GoRaleigh operating the route and the City of Raleigh paying a portion of the total cost, equivalent to the percentage of route in Raleigh. The fare free fixed route service, the Wake Forest Loop, offered Wake Forest residents access to commercial and shopping opportunities, medical facilities, and public services in the Wakefield neighborhood in Raleigh. The Town is also served by the Wake Forest-Raleigh Express (WRX), a commuter service route from GoTriangle, and operated by GoRaleigh. The bus service runs hourly service during peak hours between the Downtown Wake Forest, Triangle Town Center, and Downtown Raleigh.

The Wake Forest Public Transit Plan will evaluate existing service; understand the viability of alternatives to fixed-route services; and recommended a solution for transit expansion, including the service model type, cost of expansion, and implementation steps.



Board of Commissioners Work Session Agenda Item Report

Agenda Item No.: 2021-681-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: October 4, 2022

SUBJECT

Monthly Financial Report

Recommendation:

Item Summary:

ATTACHMENTS

- [August 31, 2022 Financial Summaries.pdf](#)

Town of Wake Forest

August 31, 2022

GENERAL FUND HIGHLIGHTS:

- Total year-to-date revenues are at 6.69% of annual budgeted amounts.
- Ad valorem taxes represent over 55% of the general fund revenues – they are due September 1. Penalties and interest do not accrue until January 2023. Majority of this revenue source comes in towards the end of December and before January 6.
- Unrestricted intergovernmental revenues (sales and utility franchise tax) represent over 23% of general fund revenues. The first distribution of these revenues will be received in mid-October.
- Other financing sources include installment purchase proceeds, interfund transfers and appropriated fund balance – reflective later in the fiscal year.
- Total year-to-date expenditures are at 17.38% of appropriations (includes encumbrances).
 - Departments that are above the guideline results from blanket purchase orders that are issued in July for services that cover the fiscal year, purchase orders carried forward (items not received in FY 22) and capital equipment being ordered earlier due to delayed delivery times.
- Net loss YTD (*decrease* fund balance) is **\$3.6 million**.
 - Typical for General Fund to operate at a deficit first few months of fiscal year due to timing of property tax collections and receipt of sales tax revenues.

DEBT SERVICE FUND HIGHLIGHTS:

- \$160,704 in debt service payments made in August
- Net increase YTD (*increase* in fund balance) is **\$212,938**

WF BIP:

- Other financing sources represents transfer from General Fund.
- Credit balance in expenditures is a result of transfer of allocated personnel costs from Electric fund – based on two positions. Second position was recently filled and will correct itself over the fiscal year.

DMSD HIGHLIGHTS:

- Majority of DMSD tax revenue will come in December and early January.

WFRC HIGHLIGHTS:

- Expenditures are at 14.15% which is below the guideline (16.67%).
- Other financing sources represents transfer from General Fund for personnel costs.

August 31, 2022 - Financial Summaries – page 2

ELECTRIC FUND HIGHLIGHTS:

- Total year-to-date revenues are at 18.76% of budgeted amounts.
- Total expenses are at 34.58% (includes encumbrances) – without inventory encumbrance – 11.8%.
 - Purchase for resale – power for August (\$1,320,037) is paid in September and not reflected in the attached.
 - Purchase order for \$4,383,350 was issued in April per bids received for transformers (inventory).
 - Lead time on this order is approximately up to 60 weeks and will not affect FY 22 bottom line.
 - Purchases for inventory are accounted for on a cash basis during the fiscal year then reconciled to the balance sheet at year end.
 - Purchase orders for transformers were carried forward from FY 22.
- Net gain YTD is \$1,690,367.

AMERICAN RESCUE PLAN ACT (ARPA):

- Received second tranche in July - \$7,270,923.
- With final treasury rules and internal policies in place, staff is moving forward with issuing purchase orders for ARPA equipment/projects
- Report is a “life to date” (LTD) meaning everything reported is cumulative from the beginning – July 2021.

GENERAL FUND
August 31, 2022

Monthly Target Percentage

16.67%

Department	Amended Budget	YTD Actual	Encumbrances	Remaining Budget (including encumbrances)	% Budget Used (includes encumbrances)	PY YTD Actuals
REVENUES						
Ad Valorem Taxes	\$ 36,287,700	\$ 3,140,355	-	\$ 33,147,345	8.65%	\$ 3,220,316
Other Taxes	56,500	6,449	-	50,051	11.41%	4,843
Unrestricted Intergovernmental	15,656,740	-	-	15,656,740	0.00%	-
Restricted Governmental	2,130,325	400,019	-	1,730,306	18.78%	-
Permits and Fees	2,671,700	523,290	-	2,148,410	19.59%	789,744
Other Revenue	1,481,870	162,669	-	1,319,201	10.98%	413,970
Sales and Services	4,187,500	222,820	-	3,964,680	5.32%	162,026
Investment Earnings	28,000	59,624	-	(31,624)	212.94%	915
Other Financing Sources	4,959,020	-	-	4,959,020	0.00%	-
General Fund Total	\$ 67,459,355	4,515,225	-	62,944,130	6.69%	\$ 4,591,813

Department	Amended Budget	YTD Actual	Encumbrances	Remaining Budget (including encumbrances)	% Budget Used (includes encumbrances)	PY YTD Actuals
EXPENDITURES						
410 Board of Commissioners	\$ 261,765	\$ 128,157	\$ -	\$ 133,608	48.96%	\$ 87,813
412 Legal Services	462,300	45,320	-	416,980	-	830
420 Administration	1,028,650	103,886	8,629	916,136	10.94%	121,795
425 Communications	1,285,135	179,824	149,021	956,290	25.59%	138,583
430 Human Resources	1,175,890	147,512	-	1,028,378	12.54%	166,416
435 Downtown Development	462,000	76,307	-	385,693	16.52%	34,722
440 Finance	1,749,765	226,941	-	1,522,824	12.97%	103,533
445 Information Technology	1,554,385	276,060	53,549	1,224,776	21.21%	207,191
480 Building Inspections	2,084,075	264,402	10,202	1,809,471	13.18%	259,426
490 Planning	3,885,728	148,442	487,131	3,250,155	16.36%	203,433
500 Public Facilities	3,423,013	326,534	864,002	2,232,476	34.78%	520,479
510 Police	15,102,949	1,977,990	312,065	12,812,893	15.16%	1,752,552
520 Fire	10,656,547	1,609,426	535,502	8,511,619	20.13%	1,329,814
530 Public Works Administration	303,800	36,372	-	267,428	11.97%	49,366
535 Urban Forestry	453,930	53,422	-	400,508	11.77%	26,051
540 Engineering	1,836,475	175,941	280,168	1,380,366	24.84%	148,591
550 Fleet Maintenance	628,345	62,619	-	565,726	9.97%	65,076
560 Streets	3,314,933	321,302	163,048	2,830,584	14.61%	367,450
580 Solid Waste	5,684,480	145,666	309,235	5,229,579	8.00%	576,215
620 Parks and Recreation	4,892,925	640,860	431,170	3,820,896	21.91%	444,773
999 Transfers	7,212,265	1,173,318	-	6,038,947	16.27%	1,128,282
General Fund Total	\$ 67,459,355	8,120,299	3,603,721	55,735,335	17.38%	\$ 7,732,393

General Fund - Net Gain (Loss)

\$ (3,605,074)

\$ (3,140,580)

Debt Service Fund
August 31, 2022

Monthly Target Percentage

16.67%

Department	Amended Budget	YTD Actual	Remaining Budget (including encumbrances)	% Budget Used (includes encumbrances)	PY YTD Actuals
REVENUES					
Restricted Governmental	\$ 1,314,400	-	1,314,400	0.00%	-
Permits and Fees	745,000	59,724	685,276	0.00%	73,470
Investment Earnings	750	810	(60)	0.00%	5
Other Financing Sources	5,182,330	852,888	4,329,442	16.46%	893,692
General Fund Total	\$ 7,242,480	913,422	6,329,058	12.61%	\$ 967,166

Department	Amended Budget	YTD Actual	Remaining Budget (including encumbrances)	% Budget Used (includes encumbrances)	PY YTD Actuals
EXPENDITURES					
440 Finance	\$ -	\$ -	\$ -	-	-
445 Information Technology	404,895	199,884	205,011	49.37%	203,759
480 Building Inspections	103,750	48,605	55,145	46.85%	49,924
500 Public Facilities	711,260	291,292	419,968	40.95%	298,793
510 Police	728,895	-	728,895	0.00%	-
520 Fire	387,750	134,543	253,207	34.70%	145,287
535 Urban Forestry Division	8,550	-	-	-	-
540 Engineering	7,055	-	7,055	0.00%	-
550 Fleet Maintenance	8,550	-	8,550	0.00%	-
560 Streets	1,932,550	13,618	1,918,932	0.70%	15,458
570 Powell Bill	890,640	-	890,640	0.00%	-
580 Solid Waste	107,915	-	107,915	0.00%	-
620 Parks and Recreation	1,950,670	12,543	1,938,127	0.64%	14,238
General Fund Total	\$ 7,242,480	700,484	6,541,996	9.67%	\$ 727,459

Debt Service Fund - Net Gain (Loss)

\$ 212,938

\$ 239,707

DMSD Special Revenue Fund
August 31, 2022

Monthly Target Percentage

16.67%

Department	Amended Budget	YTD Actual	Encumbrances	Remaining Budget (including encumbrances)	% Budget Used (includes encumbrances)	PY YTD Actuals
REVENUES						
Ad Valorem Taxes	\$ 147,710	\$ 20,961	-	\$ 126,749	14.19%	\$ 8,836
Investment Earnings	390	730	-	(340)	187.30%	16
Other Financing Sources	-	-	-	-	0.00%	105
DMSD Special Revenue Fund Total	\$ 148,100	21,691	-	126,409	14.65%	\$ 8,957

Department	Amended Budget	YTD Actual	Encumbrances	Remaining Budget (including encumbrances)	% Budget Used (includes encumbrances)	PY YTD Actuals
EXPENDITURES						
Transfers In (Out)	\$ 148,100	\$ -	\$ -	\$ 148,100	0.00%	\$ -
DMSD Special Revenue Fund Total	\$ 148,100	-	-	148,100	0.00%	\$ -

Downtown District - Net Gain (Loss)

21,691

8,957

Wake Forest Renaissance Centre
August 31, 2022

Monthly Target Percentage

16.67%

Department	Amended Budget	YTD Actual	Encumbrances	Remaining Budget (including encumbrances)	% Budget Used (includes encumbrances)	PY YTD Actuals
REVENUES						
Sales and Services	\$ 199,655	\$ 35,498	\$ -	\$ 164,158	17.78%	\$ 29,012
Other Revenue	117,840	18,647	-	99,194	15.82%	2,485
Other Financing Sources	633,100	76,791	-	556,309	12.13%	55,354
WFRC Fund Total	\$ 950,595	130,935	-	819,660	13.77%	\$ 86,850

Department	Amended Budget	YTD Actual	Encumbrances	Remaining Budget (including encumbrances)	% Budget Used (includes encumbrances)	PY YTD Actuals
EXPENDITURES						
626 Wake Forest Renaissance Centre	\$ 950,595	\$ 122,513	\$ 12,040	\$ 816,042	14.15%	\$ 93,976
WFRC Fund Total	\$ 950,595	122,513	12,040	816,042	14.15%	\$ 93,976

WFRC Fund - Net Gain (Loss) **\$ 8,422** **\$ (7,126)**

Wake Forest Business and Industry Partnership Fund (BIP)
August 31, 2022

Monthly Target Percentage

16.67%

Department	Amended Budget	YTD Actual	Encumbrances	Remaining Budget (including encumbrances)	% Budget Used (includes encumbrances)	PY YTD Actuals
REVENUES						
Sales and Services	\$ -	\$ -	\$ -	\$ -	0.00%	\$ -
Other Revenue	-	-	-	-	0.00%	8,000
Other Financing Sources	409,700	60,878	-	348,823	14.86%	60,430
WFRC Fund Total	\$ 409,700	60,878	-	348,823	14.86%	\$ 68,430

Department	Amended Budget	YTD Actual	Encumbrances	Remaining Budget (including encumbrances)	% Budget Used (includes encumbrances)	PY YTD Actuals
EXPENDITURES						
415 Economic Development	\$ 409,700	\$ (1,588)	\$ -	\$ 411,288	-0.39%	\$ 17,175
WFRC Fund Total	\$ 409,700	(1,588)	-	411,288	-0.39%	\$ 17,175

WFBIP Fund - Net Gain (Loss) **\$ 62,465** **\$ 51,255**

ELECTRIC FUND
August 31, 2022

Monthly Target Percentage

16.67%

Department	Amended Budget	YTD Actual	Encumbrances	Remaining Budget (including encumbrances)	% Budget Used (includes encumbrances)	PY YTD Actuals
REVENUES						
Charges for Services	\$ 22,356,500	\$ 4,175,589	-	\$ 18,180,911	18.68%	\$ 4,005,501
Sales Tax - Utility	1,552,700	290,247	-	1,262,453	18.69%	278,867
Other Revenue	240,000	86,868	-	153,132	36.19%	8,101
Investment Earnings	2,000	5,463	-	(3,463)	273.17%	150
Other Financing Sources	149,500	-	-	149,500	0.00%	-
Electric Fund Total	\$ 24,300,700	4,558,167	-	19,742,533	18.76%	\$ 4,292,620

Department	Amended Budget	YTD Actual	Encumbrances	Remaining Budget (including encumbrances)	% Budget Used (includes encumbrances)	PY YTD Actuals
EXPENDITURES						
850 Electric - Operations	\$ 23,898,500	\$ 2,797,769	\$ 5,535,108	\$ 15,565,624	34.87%	\$ 2,822,012
860 Electric - Tree Trimming	402,200	70,031	-	332,169	17.41%	68,553
Electric Fund Total	\$ 24,300,700	2,867,800	5,535,108	15,897,793	34.58%	\$ 2,890,565

Electric Fund - Net Gain (Loss)

1,690,367

1,402,056

AMERICAN RESCUE PLAN ACT (ARPA)
8/31/2022 (Cumulative - Life to Date)

Monthly Target Percentage

N/A

N/A						
Department	Amended Budget	LTD Actual	Encumbrances	Remaining Budget	% Budget Used	PY YTD Actuals
REVENUES						
Restricted Governmental	\$ 14,541,000	14,541,846	-	(846)	100.01%	-
Investment Earnings	-	32,792	-	(32,792)	0.00%	-
Other Financing Sources	-	-	-	-	0.00%	-
General Fund Total	\$ 14,541,000	14,574,637	-	(33,637)	100.23%	\$ -
Department	Amended Budget	LTD Actual	Encumbrances	Remaining Budget	% Budget Used	PY YTD Actuals
EXPENDITURES						
445 Information Technology	\$ 1,030,000	\$ -	\$ 233,219	\$ 796,781	22.64%	\$ -
525 Public Safety (ARPA)	2,800,000	340,426	2,484,642	(25,068)	100.90%	-
540 Engineering	6,325,000	-	-	6,325,000	0.00%	-
638 Other Improvements	4,386,000	816,131	-	3,569,869	18.61%	-
General Fund Total	\$ 14,541,000	1,156,557	2,717,861	10,666,582	26.64%	\$ -
ARPA Fund - Net Gain (Loss)		\$ 13,418,080				\$ -



Board of Commissioners Work Session Agenda Item Report

Agenda Item No.: 2021-433-

Submitted by:

Submitting Department: Administration

Meeting Date: October 4, 2022

SUBJECT

Review of Draft Agenda for Upcoming Regular Meeting

Recommendation:

Item Summary:

ATTACHMENTS

- [DraftBOCAgendaSept202218.pdf](#)



Wake Forest Board of Commissioners
Draft Meeting Agenda
October 18, 2022 at 6:00 PM
All items listed are for discussion and possible action.

Call to Order

Pledge of Allegiance

1.Approval of Agenda

2.Approval of Minutes

- 2.A. September 6, 2022 Work Session
- September 20, 2022 Work Session

3.Presentations

- 3.A. Proclamation Recognizing November 2022 as Family Court Awareness Month
- 3.B. Proclamation Recognizing November 2022 as Native American Heritage Month
- 3.C. Presentation on CPA-22-03, Draft Town of Wake Forest Historic Preservation Plan Update
- 3.D. Introduction of Candidates for the Board of Adjustment and Planning Board
- 3.E. Presentation of Annual Reports from the Town's Advisory Boards

4.Public hearings / Public Comment

- 4.A. Public Hearing and Consideration of a Request by Dean Verhoeven to Designate his Building and Lot, known as the Tommy and Sue Byrne House, 442 Pineview Drive, Wake Forest, NC, as a Wake Forest Local Historic Landmark, HPC Case Number LL 22-01
- 4.B. Public Hearing to receive public input on capital needs for inclusion in the five year Capital Improvements Plan (CIP) update for 2023 - 2028
- 4.C. Public Hearing on CPA 2022-03, Draft Historic Preservation Plan Update

- 4.D. Public Comment: If anyone would like to address the Board of Commissioners on an item other than a public hearing item during the time of public comment, please sign up with the Town Clerk prior to the meeting. Each speaker is asked to limit comments to 5 minutes. Please provide the clerk with copies of any handouts you have for the Board. Although the Board is interested in hearing your concerns, speakers should not expect Board action or deliberation on subject matter brought up during the Public Comment segment. Topics requiring further investigation will be referred to the appropriate Town Staff and may be scheduled for a future agenda. Thank you for your consideration of the Board of Commissioners, staff and other speakers.

5.Consent Agenda

(A Consent Agenda is a group of items passed with a single motion and vote. These matters are of a generally routine nature. No debate is allowable on any item included on the Consent Agenda. If a Commissioner or any citizen of Wake Forest or its ETJ wants separate consideration of any item, it may be removed from the Consent Agenda by request.)

- 5.A. Consideration of a petition requesting contiguous annexation submitted by Louise T and Edward B Smith and Janest D and Julius O Morris for property associated with Morris Subdivision located at 0 N Main St, 1159 N Main St, 1161 N Main St, 1163 N Main St, and 1164 N Main St (portion) being Wake County PINs 1841-98-4646, 1841-98-7225 (portion), 1851-08-4059 (portion), 1841-88-68-35, 1841-88-3996, and 1841-89-0142 and adjacent right-of-way being approximately 23.241 acres.
- 5.B. Resolution to Accept Streets into the Town of Wake Forest Street System for Maintenance.
- 5.C. Approval of Appointments to Citizen Advisory Boards

6.Legislative Items

- 6.A. Consideration of an Ordinance Amending the Code of Ordinances Chapter 14, Article III, Section 14-66 thru 14-75 - Noise
- 6.B. Appointment of Candidates for the Board of Adjustment and Planning Board

7.Planning Items

- 7.A. Consideration of CPA-22-03, Draft Town of Wake Forest Historic Preservation Plan Update

8.Administration and Financial Items

- 8.A. Consideration for Approval to amend the Town of Wake Forest Code of Ordinances Chapter 4, Article II

9.Public Services Items

10.Parks and Recreation Items

11.Public Safety Items

12.Other Business

- 12.A. Department Monthly Report
- 12.B. CIP Project Tracker
- 12.C. Strategic Plan
- 12.D. Wake County Tax Release
- 12.E. Commissioner Reports

13.Adjournment



Board of Commissioners Work Session Agenda Item Report

Agenda Item No.: 2021-683-

Submitted by: Kip Padgett

Submitting Department: Administration

Meeting Date: October 4, 2022

SUBJECT

Closed Session - NCGS 142-318.11(a)(5) To establish, or to instruct the public body's staff or negotiating agents concerning the position to be taken by or on behalf of the public body in negotiating (i) the price and other material terms of a contract or proposed contract for the acquisition of real property by purchase, option, exchange, or lease.

Closed Session - Consultation with the Town Attorney, N.C.G.S. § 143.318.11(a)(3): Town of Wake Forest v. Ailey Young Heirs (21-CVS-13894).

Recommendation:

Item Summary:

ATTACHMENTS

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