



Wake Forest Board of Commissioners
Meeting Agenda
September 19, 2023 at 6:00 PM
All items listed are for discussion and possible action.

Notice

In accordance with the requirements of Title II of the Americans with Disabilities Act of 1990 (ADA), the Town of Wake Forest will not discriminate against qualified individuals with disabilities on the basis of disability in its services, programs, or activities. For individuals with impaired hearing, special equipment is available for use during meetings in the Town Hall board chambers. Anyone who requires an auxiliary aid or service for effective communication, or a modification of policies or procedures to participate in a program, service, or activity of Town of Wake Forest should contact ADA Coordinator [Mickey Rochelle](#) at 919-435-9455 or Town Clerk [Terry Savary](#) at 919-435-9432 as soon as possible, but no less than 48 hours before the scheduled event.

Cable & Online Broadcast of Board of Commissioners Meetings

All [Board of Commissioners](#) (BOC) meetings are broadcast live on [WFTV 10](#) beginning at 6 p.m. Meetings are also streamed online on the [Public Meetings Portal](#) on the [Town of Wake Forest website](#). Archived meeting videos are also provided and available for one year after the original air date.

Meeting Agendas

The BOC meeting agenda is available to be viewed and downloaded by noon on the Friday prior to the third Tuesday of each month. Citizens may request copies of the agenda or submit questions concerning agenda items by calling the Town Clerk's office at 919-435-9432. Citizens may also receive a copy of each month's agenda via email by enrolling in the free [E-Notifier](#) subscription service.

Public Hearings

When an agenda item is denoted as a [Public Hearing](#), persons attending shall be permitted to address the BOC regarding the item under consideration. Anyone wishing to address the BOC concerning a public hearing item should complete and submit the BOC Public Comment Form on the [Town website](#). Proponents and opponents shall each be given three minutes of time to speak and may choose to allow one speaker to utilize the time. In the event either proponent(s) or opponent(s) have not designated a speaker to represent the view, each speaker will be allowed three minutes each to express his/her comments, ideas, concerns, expressions, and desires. A designated speaker for a group will be allowed 10 minutes to speak. Only comments on a Public Hearing will be allowed during this time.

Public Comment

During the Public Comment period, anyone wishing to address the BOC concerning an issue or topic that is not a public hearing item or an agenda item should complete and submit the BOC Public Comment Form on the [Town website](#). Then, during the Public Comment portion of the meeting, Mayor Jones will recognize you and invite you to the podium at which time you will have three minutes to speak. Thank you for your cooperation.

Call to Order

Pledge of Allegiance

1.Approval of Agenda

2.Approval of Minutes

- 2.A. July 6, 2023 Work Session
July 18, 2023 Regular Meeting
August 1, 2023 Work Session
August 15, 2023 Regular Meeting
[DraftBOCWSEMinutesJul202306.pdf](#)
[DraftBOCMinutesJul202318.pdf](#)
[DraftBOCWSEMinutesAug202301.pdf](#)
[DraftBOCMinutesAug202315.pdf](#)

3.Presentations

- 3.A. Proclamation Recognizing the Month of October 2023 as "P.A.N.D.A.S. Month"
[ProclamationRecognizingPANDASAwarenesMonthSept202319.pdf](#)
- 3.B. Proclamation Recognizing "Public Power Week" October 1- 7, 2023
[ProclamationPublicPowerWeekSept202319.pdf](#)
- 3.C. Proclamation Recognizing Deacon Tyrone Moore
[ProclamationRecognizingDeaconMoore_Sept2023.pdf](#)
- 3.D. Introduction of Candidates for the Planning Board
[Summary Sheet_Candidates_Sept202319.pdf](#)

4.Public Hearings / Public Comment

- 4.A. Public Hearing on LEGISLATIVE CASE RZ-23-01, 4Rivers - Wake Forest Self Storage, a conditional rezoning filed by Rob Caudle on behalf of Franklin Village, LLC, to rezone 2.64 acres located at 0 Friendship Chapel Road, being Wake County Tax PIN 1850066925, from General Residential 10 (GR10) to Highway Business Conditional District (HB-CD).
[BOC Agenda Summary RZ-23-01.pdf](#)
[RZ-23-01 Staff Report.pdf](#)

[Attachment A - Neighborhood Meeting Information.pdf](#)
[Attachment B - Application.pdf](#)
[Attachment C - Maps.pdf](#)
[Attachment D - Planning Board Recommendation and Plan Consistency Analysis.pdf](#)
[Attachment E - Parking Generation Memorandum.pdf](#)
[Exhibit 1 - Legal Description.pdf](#)
[Exhibit 2 - Consistency Statement.pdf](#)
[Exhibit 3 - 4Rivers - Wake Forest Self Storage Master Plan.pdf](#)

- 4.B. 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 3 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. Approval of AGNC, LLC and Town of Wake Forest Development Agreements for Downtown Streetscape Improvements on N White Street and E Roosevelt Avenue
[BOC Agenda Summary.pdf](#)
[Reimbursement Agreement.pdf](#)
[Exhibit A: N White St & E Roosevelt Ave Streetscape Improvements Resolution.docx](#)
- 5.B. APPROVAL OF ORDINANCE ADDING CHAPTER 30; ARTICLE IV PARKING, STOPPING, AND STANDING SECTION 30-164 – ENFORCEMENT OF TEMPORARY PARKING RESTRICTIONS
[Attachment_A_summary_Temporarily_Enforce_No_Parking.docx](#)
[Attachment_B_Ordinance_Temporarily_Enforce_No_Parking.docx](#)
- 5.C. Approval of a resolution to schedule the public hearing and certify the sufficiency for a petition requesting annexation submitted by Douglas and Sarah Machado for property associated with the rezoning request RZ-23-03, located at 2117 Averette Road being

Wake County PINs 1851-90-8235 being approximately 2.822 acres.
[091923 BOC Agenda Summary AN-23-03.pdf](#)
[Attachment A Legal Description AN-23-03.pdf](#)
[Attachment B Annexation Map AN-23-03.pdf](#)
[Attachment C Contiguous Annexation Petition AN-23-03.pdf](#)
[CERTIFICATE OF SUFFICIENCY .docx](#)
[DRAFT PUBLIC HEARING RESOLUTION.docx](#)

6.Legislative Items

- 6.A. Consideration of Appointment of Candidates for the Planning Board
[PB Candidates Cover letter_1.pdf](#)
[PB Applicants -Regular Seat.pdf](#)
[PB APPLICANT - ETJ.pdf](#)

7.Planning Items

- 7.A. Consideration of LEGISLATIVE CASE RZ-23-01, 4Rivers - Wake Forest Self Storage, a conditional rezoning filed by Rob Caudle on behalf of Franklin Village, LLC, to rezone 2.64 acres located at 0 Friendship Chapel Road, being Wake County Tax PIN 1850066925, from General Residential 10 (GR10) to Highway Business Conditional District (HB-CD).

8.Administration and Financial Items

- 8.A. Consideration of a resolution authorizing the filing of an application for approval of a financing agreement authorized by NC General Statute 160A-20 (Street Resurfacing)
[160A-20 Application _summary.pdf](#)
[Draft Timetable _Streets IPA.pdf](#)
[Resolution 2023-xx _Authorizing Application _Street Financing.docx](#)
- 8.B. Approval of a Resolution to Support Development of the S-Line Rail Corridor and to Provide Local Funding to Match a Federal Grant Opportunity for Mobility Hub Design and Project Development Activities
[2023-250 Agenda Summary BoC.pdf](#)
[RCN _Grant _Draft _Resolution __3_.doc](#)

9.Public Services Items

10.Parks and Recreation Items

11.Public Safety Items

12.Other Business

12.A. Department Monthly Report

[August 2023 Monthly Report.pdf](#)

12.B. Wake County Tax Release

[WF-TXREP-AUG-2023-BOC-MTG.pdf](#)

[WF-TXREP-SEPT-2023-BOC-MTG.pdf](#)

12.C. Commissioner Reports

12.D. Closed Session - Closed Session 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 the price and other material terms of a contract or proposed contract for the acquisition of real property by purchase, option, exchange, or lease. N.C.G.S. § 143.318.11(a)(5)

13.Adjournment



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-212-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: September 19, 2023

SUBJECT

July 6, 2023 Work Session

July 18, 2023 Regular Meeting

August 1, 2023 Work Session

August 15, 2023 Regular Meeting

Recommendation:

Item Summary:

ATTACHMENTS

- [DraftBOCWSEMinutesJul202306.pdf](#)
- [DraftBOCMinutesJul202318.pdf](#)
- [DraftBOCWSEMinutesAug202301.pdf](#)
- [DraftBOCMinutesAug202315.pdf](#)



Wake Forest Board of Commissioners Work Session Meeting Minutes

The Wake Forest Board of Commissioners met on **Tuesday, July 6, 2023**, at **6:00 p.m.** in the Board Room at Wake Forest Town Hall, 301 S Brooks Street.

Mayor Jones called the meeting to order at 6:00 p.m.

Commissioners Present: Mayor Vivian A. Jones, Commissioner Jim Dyer, Commissioner Chad Sary, Commissioner Keith Shackleford, Commissioner Nick Sliwinski, and Commissioner Adam Wright

Commissioners Absent: None.

Staff Members Present:

Town Manager Kip Padgett
Assistant Town Manager Candace Davis
Assistant Town Manager/Chief
Financial Officer Aileen Staples
Town Clerk Theresa Savary
Planning Director Courtney Tanner
Assistant Planning Director Jennifer Currin

Assistant Engineering Director Monica Sarna
CIP Manager Steven Meyer
Facilities Maintenance Specialist Steven Carpenter
Facilities Director Mickey Rochelle
Police Chief Jeff Leonard
Police Captain Julius Jefferson
Police Captain Brandon High

1. Presentations

1.1 Present to the Board information for Intermunicipal Agreement for Stormwater and Paving Improvements for Reimbursement

Assistant Engineering Director Monica Sarna provided a presentation on the Intermunicipal Agreement for Stormwater and Paving Improvements for Reimbursement.

Commissioner Sary asked if any vegetation would be removed. Ms. Sarna replied she believes there was a note about tree trimming. Commissioner Sary asked if anything major would be removed. Ms. Sarna replied she doesn't know for certain but said it was pertaining more to tree trimming.

Commissioner Dyer asked if S. Allen St. would eventually connect to Deacons Ridge. Ms. Sarna responded that the Engineering Department has identified the gap and, currently, the scope goes to Quail St. She said they've discussed the road connection project south of Quail St. to the Deacon's Ridge neighborhood. When that project were to take place, the resurfacing would extend all the way through so there wouldn't be a gap. Mayor Jones asked when that might occur. Ms. Sarna replied that the timeframe has not occurred. She believes the City of Raleigh is expecting to go to bid on this project in the spring of 2024.

This item will come before the Board of Commissioners for action at its July 18, 2023 meeting.

1.2. Presentation on the Wake Forest Public Transit Plan Transit Service Alternatives

Planning Director Courtney Tanner shared that the project is on schedule and is being paid for through American Rescue Plan Act (ARPA) funds. She explained that Jared Draper with Toole Design would outline some of the alternatives that were identified through public feedback. Ms. Tanner noted the draft plan will go before the Planning Board and Board of Commissioners in approximately two months.

Jared Draper with Toole Design provided a presentation on the Wake Forest Public Transit Plan Transit Service Alternatives.

Commissioner Wright asked if a ride to and from the user's destination counts as two trips in the total ridership number. Mr. Draper replied, yes.

Commissioner Sary asked Mr. Draper if he would explain to the people watching what micro-transit is. Mr. Draper explained that micro-transit is app-enabled and can be used in a lot of different ways such as smaller vehicles similar to an Uber, you can set up micro-transit to bring you door to door, and it could be used from area to area. Commissioner Sliwinski asked with micro-transit being an app-enabled service, what if someone doesn't have a smartphone or is not comfortable with the technology. Mr. Draper stated it's something to consider.

Mayor Jones asked if paratransit is included in the plan. Mr. Draper said it was not. She asked if the Wake Transit Plan pays any of the paratransit charges. Ms. Tanner replied it does not.

Commissioner Wright said he likes the idea of public transportation. He said Wake Forest is unusual in that most people who live in Wake Forest don't work in Town which makes public transportation tough. Commissioner Wright believes micro-transit would seem to be more appropriate. He believes micro-transit would serve a wider population and get people to where they want to go in a timelier fashion.

Commissioner Sary said he'd like to hear from people who are using public transportation. He asked Mr. Draper how he suggests they get that information and provide them the services they want or need. Mr. Draper said not only did they have a general survey they had a rider specific survey as well that they distributed on the bus. As they draft the report it will have findings from both surveys.

Commissioner Shackelford said he struggles with the graph that illustrates 82 percent of surveyed respondents are not using Wake Forest transit. Mr. Draper said seeing a number like that presents an opportunity for change.

Commissioner Sliwinski asked what the typical adoption rate of someone who goes from a bus loop to a micro-transit option is. Mr. Draper said micro-transit is a newer service and he doesn't know if there's a specific number for that.

Mayor Jones remarked that the City of Wilson switched over to micro-transit and eliminated fixed routes, and it has been successful.

Commissioner Sliwinski asked what percentage of the population it would encompass. Mr. Draper said he didn't think they had the exact number, but he doesn't think it would be a difficult number to understand or estimate.

Mayor Jones thinks they should include micro-transit in their plan and is somewhat inclined to switch over to micro-transit entirely.

Commissioner Sary said a call center or something similar may work for people who are not comfortable with technology. He said it's something that needs to be worked out.

Mayor Jones said they'll have to think about whether they include outside of the city limits as part of their service.

Mayor Jones said the Town is having difficulty in finding bus drivers and if the Town shifts to micro-transit, would there be a problem with service. Mr. Draper replied that maybe there are some other ways the Town can incentivize drivers.

Commissioner Shackleford remarked that he likes the micro-transit option, and it seems it would fit Wake Forest and the lifestyle of the residents.

Commissioner Sary asked if there are any types of interlocal agreements that would set certain boundaries. Mr. Draper said micro-transit is not intended to be a full-on Uber and Lyft type of service; it's about setting a zone and working within that zone.

Commissioner Dyer asked if the drivers would be employees of the Town. Mr. Draper responded it could be GoRaleigh or a different service. Mayor Jones said there are micro-transit companies you can hire.

Mayor Jones suggested charging a fee for micro-transit if folks go outside the city limits. Mr. Draper stated the biggest caution as you change the distance and make zones larger is you also change the liability of the on-demand side of short turnaround inside the zone.

Commissioner Sliwinski is a fan of the micro-transit option as long as they're aware they need to mitigate the impact of those who are currently using the bus.

Mayor Jones asked if there were any more questions or comments. No further questions or comments were heard.

1.3. Presentation of the third amendment to the Wake Forest/Raleigh Utility Merger Agreement

Planning Director Courtney Tanner discussed the Wake Forest/Raleigh Utility Merger Agreement and provided a summary of the highlights included in the amendment.

Commissioner Sary said he's excited to see this happening after all these years.

Mayor Jones said it was time to do this.

2. Discussion of Monthly Financial Report

2.1. Monthly Financial Report

Received.

Assistant Town Manager/Chief Financial Officer Aileen Staples provided a brief update on the audit.

3. Review of Draft Agenda for Upcoming Regular Meeting

3.1. Review of Draft Agenda for Upcoming Regular Meeting

The draft agenda was reviewed.

Town Manager Padgett shared that the following items would be added to the July 18, 2023 Board of Commissioners agenda:

- Approval of the Authorization for the Town Manager to execute the Intermunicipal Agreement for Stormwater and Paving Improvements for Reimbursement (consent agenda)
- Approval of the Third Amendment to the Wake Forest/Raleigh Utility Merger Agreement (consent agenda)
- Consideration of Naming Rights for Flaherty Park Field #2 – Wegmans (Parks & Recreation Item)

4. Other Business

Town Manager Padgett stated the following Items 4.1. and 4.2. are a follow-up to some closed sessions they had regarding property acquisition attempts that have not proven successful

4.1. Consideration to Condemn Property Located at 300 N. White Street

Town Manager Padgett stated the property is 0.818 acres and the appraisal value is \$210,000. He said they continue to try and work with the property owner but have not been able to reach an agreement.

ACTION:

Mover: Commissioner Wright made a motion to condemn property located at 300 N. White St.

Second: Commissioner Dyer.

Vote: Motion carried 5-0.

4.2. Consideration to Condemn Certain Property as Part of the Extension of the Dunn Creek Greenway Phase III Project

Town Manager Padgett stated this is a condemnation request for part of the Dunn Creek Greenway where they recently passed the Bond Referendum. He said this is one of the last outstanding parcels that they need and have been working since February 2023 to try and get an easement, but they've been unsuccessful. The parcel is approximately 7 acres and is located on Wait Avenue for \$132,330.

ACTION:

Mover: Commissioner Wright made a motion to condemn certain property as part of the extension of the Dunn Creek Greenway Phase III project.

Second: Commissioner Dyer.

Vote: Motion carried 5-0.

5. Commissioner Reports

Commissioner Shackelford thanked all those who were involved in putting on the Independence Day Event.

Commissioner Dyer attended the Human Relations Council. He shared that Good Neighbor Day is Saturday, September 16, 2023. The Historic Preservation Commission is on Wednesday, July 12, 2023, and the Memorial Flag-Raising Ceremony is Monday, July 10, 2023.

Commissioner Wright attended the July 3rd fireworks and the Technology Advisory Board (TAB) Meeting. He shared that the STEM Saturday Event would be scheduled on April 27, 2024. Commissioner Wright said he will not be able to attend the August 1, 2023 Board of Commissioners Work Session.

Commissioner Sliwinski shared his appreciation for staff and volunteers who worked at the Independence Day Celebrations, he attended the Parks, Recreation & Cultural

Resources (PRCR) Meeting, there are currently eight open seats for Advisory Boards, and a Mental Health Resource Fair will be held on Saturday, October 21, 2023.

Commissioner Sary encouraged people to get involved and serve on one of the Advisory Boards. He thanked staff and the volunteers for their time and efforts during the Independence Day Celebrations.

Mayor Jones attended the Atlas Stark groundbreaking at 535 S. White St. She was honored to be part of the Commission for Accreditation of Park and Registration Agencies (CAPRA) visit. She explained the CAPRA Team came in for recertification of the PRCR Department. She said under the leadership of Ed Austin they did a great job. She shared that the PRCR Department had to meet 95 percent of the 154 steps required for their recertification, in which they met 100 percent of the steps. She complimented Randy Hoyle for his "Maintenance Matters" column in the PRCR Newsletter. She recognized former employee Michelle Douglas for a great job tending to the plants and flowers downtown. She attended the Independence Day Celebrations. She shared that Wake Forest Fungo is doing great and they're offering a player's clinic this Saturday, July 8, 2023 for children ages 8 – 12.

Town Manager Kip Padgett had no report.

6. Adjournment

The Board of Commissioners adjourned the meeting at 7:08 p.m.

Duly approved in open session this 15th day of August 2023.

(ATTEST)

Vivian A. Jones, Mayor

Theresa Savary, Town Clerk



Wake Forest Board of Commissioners Meeting Minutes

The Wake Forest Board of Commissioners met on **Tuesday, July 18, 2023**, at **6:00** p.m. in the Board Room at Wake Forest Town Hall, 301 S Brooks Street.

Mayor Jones called the meeting to order at 6:02 p.m.

Mayor Jones led everyone in the Pledge of Allegiance.

Council Members Present: Mayor Vivian A. Jones, Commissioner Jim Dyer, Commissioner Keith Shackleford, Commissioner Adam Wright, and Commissioner Nick Sliwinski.

Commissioner Members Absent: Commissioner Sary.

Staff Members Present:

Town Manager Kip Padgett
Assistant Town Manager/Chief
Financial Officer Aileen Staples
Town Attorney Hassan Kingsberry
Town Clerk Theresa Savary
Planning Director Courtney Tanner
Assistant Planning Director Jennifer Currin
Planner II Emma Linn

Engineering Director Joseph Guckavan
Public Facilities Manager Mickey Rochelle
Public Facilities Specialist Steven Carpenter
Police Chief Jeff Leonard
Police Captain Julius Jefferson
Fire Chief Ron Early

1. Approval of Agenda

ACTION:

Mover: Commissioner Dyer moved to approve the agenda as presented.

Seconder: Commissioner Wright.

Vote: Motion carried 4-0.

2. Approval of Minutes

2.A. Approval of Minutes:

- June 6, 2023 Work Session
- June 20, 2023 Regular Meeting

ACTION:

Mover: Commissioner Wright moved to approve the minutes as presented.

Second: Commissioner Dyer.

Vote: Motion carried 4-0.

3. Presentations

No Presentations presented.

4. Public hearings / Public Comment

4.A. 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 3 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.

The following citizen provided public comment:

- David Soper, 1208 Dunn Creek Crossing, Wake Forest, NC 27587 spoke on increasing the Tree Canopy for Wake Forest.

No one else came forward to speak. Mayor Jones closed public comment.

5. Consent Agenda

- 5.A. Approval to Appoint Second Alternate Commissioner for the North Carolina Eastern Municipal Power Agency (NCEMPA).

[Filed in the Clerk's Office as Resolution 2023-36.] The Board voted on a first and second alternate Commissioner.

- 5.B. Approval of a resolution to schedule the public hearing and certify the sufficiency for a petition requesting annexation submitted by M & EM CO LLC for property associated with Rogers Road Townhomes (Darch Property) located at 0 Rogers Road being Wake County PINs 1749-78-6086, 1749-87-0648, and 1749-78-9397 being approximately 27.00 acres.

[Filed in the Clerk's Office as Resolution 2023-37.]

- 5.C. Approval of the third amendment to the Wake Forest/Raleigh Utility Merger Agreement.

- 5.D. Approval of the authorization for the Town Manager to execute the Intermunicipal Agreement for Stormwater and paving Improvements for Reimbursement.

[Filed in the Clerk's Office as Resolution 2023-38.]

ACTION:

Mover: Commissioner Dyer moved to approve the consent agenda as presented.

Seconder: Commissioner Wright.

Vote: Motion carried 4-0.

6. Legislative Items

No Legislative Items presented.

7. Planning Items

No Planning Items presented.

8. Administration and Financial Items

No Administration and Financial Items presented.

9. Public Services Items

No Public Service Items presented.

10. Parks and Recreation Items

No Parks and Recreation Items presented.

11. Public Safety Items

No Public Safety Items presented.

12. Other Business

12.A. Department Monthly Report

Received.

12.B. CIP Project Tracker

Received.

12.C. Strategic Plan

Received.

12.D. Wake County Tax Release

Received.

12.E. Commissioner Reports

Commissioner Shackelford attended a couple of the Wake Forest Fungo baseball games.

Commissioner Sliwinski attended the Ice Cream Social Event at the Corner of N. Main St., and the Wake Forest Fungo baseball game. He thanked Jennie Griggs and the Senior Center for hosting himself and PRCR Director Ruben Wall for a discussion on the proposed skate park.

Commissioner Wright attended FNOW. He shared that he was able to secure 15 computers from a local business (1-800-PACK RAT) to deliver to the Senior Center for them to offer computer classes in the future.

Commissioner Dyer attended FNOW. He shared that the Purple Heart Banquet will be held Saturday, August 5, 2023, and this year's keynote speaker is Jessica Lynch.

Mayor Jones attended the Ice Cream Social Event and a few of the Wake Forest Fungo baseball games. She thanked the Wake Forest Power Team who went to Danville, Va., to assist in restoring their power after a big storm. She shared that she had been appointed to the NCLM Policy Committee for the upcoming year. She thanked the Fire Department Water Rescue Team for assisting in a recovery search. She visited the Boys & Girls Club.

Town Manager Padgett had no report.

13. Adjournment

With no further business to discuss, the meeting was adjourned at 6:14 p.m.

Duly approved in open session this 15th day of August 2023.

(ATTEST)

Vivian A. Jones, Mayor

Theresa Savary, Town Clerk



Wake Forest Board of Commissioners Work Session Meeting Minutes

The Wake Forest Board of Commissioners met on **Tuesday, August 1, 2023, at 6:00 p.m.** in the Board Room at Wake Forest Town Hall, 301 S Brooks Street.

Mayor Jones called the meeting to order at 6:00 p.m.

Commissioners Present: Mayor Vivian A. Jones, Commissioner Jim Dyer, Commissioner Chad Sary, Commissioner Keith Shackelford, and Commissioner Nick Sliwinski

Commissioners Absent: Commissioner Adam Wright.

Staff Members Present:

Town Manager Kip Padgett
Assistant Town Manager/Chief
Financial Officer Aileen Staples
Town Attorney Hassan Kingsberry
Town Clerk Theresa Savary
Finance Director Samantha Sanchez
Planning Director Courtney Tanner
Assistant Planning Director Jennifer Currin

Engineering Director Joe Guckavan
Assistant Engineering Director Monica Sarna
CIP Manager Steven Meyer
Public Facilities Specialist Nicholas Parrish
Facilities Director Mickey Rochelle
Police Chief Jeff Leonard
Police Captain Julius Jefferson
Fire Chief Ron Early

1. Presentations

1.1 Update from the Stormwater Utility Advisory Group

Assistant Engineering Director Monica Sarna introduced Consultant Trey Shanks with Freeze and Nichols. Mr. Shanks provided an overview of the Stormwater Utility Update.

Commissioner Dyer asked what a typical fee for stormwater waste is. Mr. Shanks replied the approximate range is three to fifteen dollars per month for residential.

Mayor Jones said she appreciates the work done by the consultants and advisory groups.

No further questions or comments were heard.

1.2. Wake Forest Downtown Plan: Houseal Lavigne (Consultant) Introduction and Project Kick-Off Presentation

Assistant Planning Director Jennifer Currin introduced Consultant Nik Davis with Houseal Lavigne. Mr. Davis provided a presentation on the Wake Forest Downtown Plan.

• **Issues or concerns facing downtown Wake Forest**

Commissioner Sary expressed concerns regarding downtown parking, housing, and house prices. He would like to see consistency with all the Town's plans and expressed interest in seeing what the S-Line might look like when it becomes a reality.

Commissioner Shackleford expressed concern about the lack of parking. He commented that downtown Wake Forest is a unique community with only one street of older buildings that basically make up the downtown. He remarked that connectivity is important but is an issue. He'd like to see a pedestrian-friendly crossing located at the underpass near the Southeast Baptist Theological Seminary so it's safe for pedestrians to cross the street. He said Wake Forest doesn't have a natural draw to its downtown and something is needed that will draw people into the area. He shared that most important to him from a Town government standpoint is making sure to encourage businesses to continue to invest in downtown.

Mayor Jones expressed concern about the vacant buildings and buildings not being taken care of. She said as the Town continues to grow and expand, they need to connect with other areas of the Town. She said the parking is lacking, and more retail is needed. She believes the infrastructure surrounding the S-Line and transit-oriented development opportunities are all important.

Commissioner Sliwinski expressed concern with the lack of parking, accessibility to downtown, mass transit, and safety on the roads. He wants to make sure as

development continues there are safety measures in place. He expressed concern about delivery trucks blocking off a lane of traffic on S. White St. when unloading their trucks which could create a safety hazard if someone is not paying attention. He commented on the lack of open space downtown for people to congregate.

Commissioner Dyer expressed concern about vacant buildings downtown, parking, cost of housing, redevelopment, the S-Line, and walkability. He's excited about the new parking deck and thinks it'll resolve a lot of issues. He said the new parking deck will be centrally located and will have housing, parking, and retail.

Mr. Davis asked if there was anything that rose to the top as a high priority for the Board.

Commissioner Sary believes business investment and being a business-friendly downtown is a priority. He thinks they need to look more at the retail opportunities that are already there. He believes they need to support the downtown businesses and make it easier for someone to invest. Commissioner Sary asked if a market analysis is part of the process. Mr. Davis replied, yes.

- **Specific projects or actions the Board would like to see in the plan**

Commissioner Sary didn't have any specific projects or actions in mind that he'd like to see in the plan. He said from his perspective, he's thinking more high-level. He said open space was mentioned earlier and is probably something that would be a good exercise to see where they could make that happen.

Mayor Jones said she'd like to see businesses in the vacant buildings downtown as well as a performing arts theatre. She would also like to see connections made between the different areas in Wake Forest.

Commissioner Sliwinski remarked that downtown is lacking open space. He suggested activity areas that would become a draw to the downtown.

- **Primary strengths and assets of downtown Wake Forest**

Mayor Jones stated the businesses downtown are doing a great job and would like to see more businesses that would benefit the businesses currently there.

Commissioner Shackelford said from a strength and asset standpoint the Town Hall, the Plaza in front of Town Hall, S. White Street Streetscape and Owen St. are an asset and a huge step in the right direction. He also mentioned Franklin Street Streetscape; although, it's disconnected from downtown.

Commissioner Sliwinski said there are local business owners and local businesses downtown which he thinks is fantastic and wants to see it continue.

Commissioner Sary said it's a unique downtown and is a destination place. He said the small businesses and Mom and Pop Shops are what draw that attraction.

Commissioner Dyer said it's always an issue when you have bypasses and major thoroughfares near a downtown area. He said the convenience of shopping at those thoroughfares and on the bypasses is always going to be a detriment to downtown. He said the community is doing so many things to draw people downtown.

Mr. Davis provided an overview of the downtown boundary. The Board provided input on potential areas to be included within the downtown boundary.

No further questions or comments were heard.

1.3. Presentation of LEGISLATIVE CASE RZ-22-08, Rogers Road Townhomes, a conditional rezoning filed by Kimley-Horn & Associates on behalf of M & EM CO LLC, to rezone 27.0 acres located at 0 Rogers Road, being Wake County Tax PIN(s) 1749786086, 1749870648, and 1749789397, from Wake County's Residential-30 (R-30) to General Residential 10 Conditional District (GR10-CD).

Senior Planner Tim Richards provided a presentation on Case RZ-22-08, Rogers Road Townhomes.

Mr. Richards stated the applicant expressed a desire to continue working with staff and intends to seek a deferral from the Board of Commissioners at the August 15, 2023 Meeting.

Commissioner Sary asked why there was a recommendation for denial made by the Planning Staff. Mr. Richards explained that the main issue is the design and layout of

the development.

Commissioner Sliwinski inquired about the height of the retaining walls. Mr. Richards replied that along the east side, the retaining wall itself is approximately ten feet and runs a little taller towards the south end.

No further questions or comments were heard.

2. Discussion of Monthly Financial Report

2.1. Monthly Financial Report

Ms. Staples provided a brief update on the interim financial summary.

3. Review of Draft Agenda for Upcoming Regular Meeting

3.1. Review of Draft Agenda for Upcoming Regular Meeting

The draft agenda was reviewed.

4. Other Business

4.1. Presentation of the Amended Policies & Procedures

Human Resources Director Angela McCray provided a presentation on the amended policies & procedures.

No questions or comments were heard.

5. Commissioner Reports

Commissioner Dyer attended the Human Relations Council Meeting. He reminded everyone the Purple Heart Banquet is Saturday, August 5, 2023, the Memorial Flag-Raising Ceremony is Monday, August 7, 2023, he shared there'll be a reading of the names in downtown Raleigh of the thirty-eight remaining veterans that are missing in action from Vietnam from the state of North Carolina.

Commissioner Sliwinski attended the Parks, Recreation & Cultural Resources (PRCR) Meeting, the Urban Forestry Board did not meet in July, Family Movie Night is scheduled at Joyner Park on Saturday, August 5, 2023, and Art in the Park is scheduled at Joyner Park on Saturday, August 26, 2023, FNOW is on Friday, August 11, 2023.

Commissioner Shackleford had no report.

Commissioner Sary shared that the Central Pines Regional Council did not meet in July and neither did the Public Arts Commission (PAC). He shared that the revised Public Art Commission Art Plan may come before the Board of Commissioners in September.

Mayor Jones shared that Wake Forest Fungo has finished its season and she looks forward to the upgrades that are going to be made to the ballpark. She attended the grand opening of the Disc Golf Course and the Youth Leadership Group. She visited Superior Tooling last week. She attended the Wake Forest Rotary Club reception. The 10-Year Anniversary Celebration of the Renaissance Centre started with the Malpass Brothers concert on July 22, 2023.

Town Manager Kip Padgett had no report.

6. Adjournment

The Board of Commissioners adjourned the meeting at 7:47 p.m.

Duly approved in open session this 19th day of September 2023.

(ATTEST)

Theresa Savary, Town Clerk

Vivian A. Jones, Mayor



Wake Forest Board of Commissioners Meeting Minutes

The Wake Forest Board of Commissioners met on **Tuesday, August 15, 2023**, at **6:00** p.m. in the Board Room at Wake Forest Town Hall, 301 S Brooks Street.

Mayor Pro Tem Jim Dyer called the meeting to order at 6:00 p.m.

Mayor Pro Tem Jim Dyer led everyone in the Pledge of Allegiance and followed in prayer.

Council Members Present: Mayor Pro Tem Jim Dyer, Commissioner Sary, Commissioner Keith Shackleford, Commissioner Adam Wright, and Commissioner Nick Sliwinski.

Commissioner Members Absent: Mayor Vivian Jones.

Staff Members Present:

Assistant Town Manager Candace Davis
Town Attorney Hassan Kingsberry
Town Clerk Theresa Savary
Assistant Planning Director Jennifer Currin
Finance Director Samantha Sanchez
HRIS Administrator Chandra Wright
Public Facilities Manager Mickey Rochelle

Public Facilities Manager Mickey Rochelle
Senior Public Facilities Specialist Joe Pennington
Police Chief Jeff Leonard
Police Captain Julius Jefferson
Police Captain Brandon High

1. Approval of Agenda

ACTION:

Mover: Commissioner Sary moved to approve the agenda as presented.

Second: Commissioner Sliwinski.

2. Approval of Minutes

2.A. Approval of Minutes:

- July 6, 2023 Work Session
- July 18, 2023 Regular Meeting

ACTION:

Mover: Commissioner Sliwinski moved to approve the minutes as presented.

Second: Commissioner Sary.

3. Presentations

3.A. Proclamation Recognizing September 18-22, 2023 as National "Falls Prevention Awareness Week" and September 19, 2023 as "Falls Prevention Awareness Day" in the Town of Wake Forest

Commissioner Sary read the proclamation into the record:

**RECOGNIZING THE WEEK OF SEPTEMBER 18TH AS *the* 16th NATIONAL FALLS
PREVENTION AWARENESS WEEK**

and

**SEPTEMBER 19TH AS FALLS PREVENTION AWARENESS DAY IN THE TOWN OF
WAKE FOREST, NC**

"FROM AWARENESS TO ACTION"

WHEREAS, It is estimated that one-fourth of Americans aged 65 and older falls each year; and

WHEREAS, Every second of every day, an older adult (age 65+) falls in the U.S.; and

WHEREAS, Falls result in more than 3 million injuries treated in emergency departments annually, including over 800, 000 hospitalizations and more than 32,000 deaths; and

WHEREAS, Each year about \$50 billion is spent on medical costs related to non-fatal fall injuries and \$754 million is spent related to fatal falls; and

WHEREAS, The state of North Carolina ranks #27 in the number of falls for those 65 and older; and

WHEREAS, Falls are the leading cause of fatal and nonfatal injuries among older adults; and

WHEREAS, Older adults who fall once are two to three times more likely to fall again; and

***WHEREAS,** Each year, 3 million older people are treated in emergency departments for fall injuries; and*

***WHEREAS,** Each year at least 300,000 older people are hospitalized for hip fractures; and*

***WHEREAS,** A growing number of older adults fear falling and, as a result, often self-limit activities and social engagements; and*

***WHEREAS,** Injuries from falls are largely a preventable community health problem; and*

***WHEREAS,** Evidence-based programs show promise in reducing falls and facilitating cost-effective interventions, such as comprehensive clinical assessments, exercise programs to improve balance and health, medication management, vision correction, and reduction of home hazards.*

***NOW, THEREFORE,** I Vivian A. Jones, Mayor of the Town of Wake Forest, do hereby proclaim the week of September 18, 2023 as “**FALLS PREVENTION AWARENESS WEEK**” in the Town of Wake Forest, and September 19, 2023 as “**FALLS PREVENTION AWARENESS DAY**” and I urge all citizens to promote multidisciplinary strategies as mentioned from Campaign above, “From Awareness to Action” to prevent falls, and encourage our residents to take steps to protect those who are at increased risk of falling.*

Commissioner Sary presented the proclamation to Program Director Jennie Griggs with the Northern Wake Senior Center.

4. Public hearings / Public Comment

4.A. Legislative Case RZ-22-08, Rogers Road Townhomes – The Rezoning Request and Contiguous Annexation Case for Property Associated with Rogers Road Townhomes (Darch Property) Located at 0 Rogers Road has been withdrawn by the applicant.

Mayor Pro Tem Dyer stated Legislative Case RZ-22-08, Rogers Road Townhomes rezoning request, and the Contiguous Annexation Case had been withdrawn by the applicant.

4.B. 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 3 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.

Mayor Pro Tem Dyer asked if anyone had any public comments. No one came forward to speak.

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. Approval of the Amended Policies & Procedures.

[Filed in the Clerk's Office as Resolution 2023-40.]

5.B. Approval of a resolution to schedule the public hearing and certify the sufficiency for a petition requesting annexation submitted by Morris Wake Forest LLC property associated with Morris Subdivision located at 0 N Main St, 1159 N Main St, 1161 N Main St, and 1163 N Main St being Wake County PINs 1841-98-8364, 1841-88-6835, 1841-88-3996, and 1841-89-0142 being approximately 22.949 acres.

[Filed in the Clerk's Office as Resolution 2023-41.]

5.C. Approval of a resolution to schedule the public hearing and certify the sufficiency for a petition requesting annexation submitted by High Bar Creek LLC, Huggy Bear LLC, and Nancy H. Dameron Trust for property associated with the Reserve at Dunn Creek Subdivision rezoning request RZ-22-05, located at 0 Friendship Chapel Road and 0 NC 98 Bypass being Wake County PINs 1840-66-0542, 1840-67-6254, 1840-76-1824, and 1840-65-7710 being approximately 67.4249 acres.

[Filed in the Clerk's Office as Resolution 2023-42.]

5.D. Approval of Appointments to Citizen Advisory Board.

[Filed in the Clerk's Office as Resolution 2023-39.]

ACTION:

Mover: Commissioner Sliwinski moved to approve the consent agenda as presented.

Second: Commissioner Wright.

Vote: Motion carried 5-0.

6. Legislative Items

No Legislative Items presented.

7. Planning Items

No Planning Items presented.

8. Administration and Financial Items

No Administration and Financial Items presented.

9. Public Services Items

No Public Service Items presented.

10. Parks and Recreation Items

No Parks and Recreation Items presented.

11. Public Safety Items

No Public Safety Items presented.

12. Other Business

12.A. Department Monthly Report

Received.

12.B. Commissioner Reports

Commissioner Sary had no report.

Commissioner Shackelford had no report.

Mayor Pro Tem Dyer had no report.

Commissioner Sliwinski had the opportunity to host FNOW and thanked staff and the volunteers who worked so hard to put the event on. He attended a show at the Renaissance Centre. He shared that Art in the Park is scheduled on Saturday, September 26, 2023, at Joyner Park. Concerts in the Park are scheduled on Sunday, September 3, 2023 and Sunday, September 10, 2023 at Joyner Park along with Wake Forest Unplugged on Sunday, September 3, 2023 from 5:00 p.m. to 7:00 p.m.

Commissioner Wright had no report.

13. Adjournment

With no further business to discuss, the meeting was adjourned at 6:13 p.m.

Duly approved in open session this 15th day of August 2023.

(ATTEST)

Vivian A. Jones, Mayor

Theresa Savary, Town Clerk



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-194-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: September 19, 2023

SUBJECT

Proclamation Recognizing the Month of October 2023 as "P.A.N.D.A.S. Month"

Recommendation:

Item Summary:

ATTACHMENTS

- [ProclamationRecognizingPANDASAwarenesMonthSept202319.pdf](#)



TOWN of
WAKE FOREST

301 S. Brooks Street
Wake Forest, NC 27587
t 919.435.9400

www.wakeforestnc.gov

**PROCLAMATION
RECOGNIZING OCTOBER 2023 AS “P.A.N.D.A.S. AWARENESS MONTH” IN
THE TOWN OF WAKE FOREST, NORTH CAROLINA**

WHEREAS, Pediatric Autoimmune Neuropsychiatric Disorders Associated with Streptococcal Infections, better known as PANDAS, is said to be a rare condition but is actually rarely diagnosed; and

WHEREAS, PANDAS is a term used to describe a subset of children who have Obsessive Compulsive Disorder and/or tic disorders such as Tourette Syndrome and in whom symptoms worsen following strep infections such as Strep Throat and Scarlet Fever; and

WHEREAS, children are often misdiagnosed and treatment is delayed. There are many treatments and options for treating this condition but, unfortunately, they are often very expensive and not covered by insurance;

WHEREAS, my friend Jay Jay Wilson suffers from this debilitating condition and I have been issuing proclamations for 10 years on his behalf; and

WHEREAS, Jay Jay’s parents work so hard to provide everything he needs to live a good life; and

NOW THEREFORE, I, Vivian A. Jones, Mayor of the Town of Wake Forest and the Board of Commissioners, do hereby proclaim October 2023 as

“P.A.N.D.A.S. MONTH IN THE TOWN OF WAKE FOREST”

and urge all citizens to become aware of this debilitating condition for children and work to make it more readily recognized by the medical profession and insurance providers.

This the 19TH day of September 2023.

ATTEST:

Theresa Savary, Town Clerk



Vivian A. Jones, Mayor



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-213-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: September 19, 2023

SUBJECT

Proclamation Recognizing "Public Power Week" October 1- 7, 2023

Recommendation:

Item Summary:

ATTACHMENTS

- [ProclamationPublicPowerWeekSept202319.pdf](#)



TOWN *of* WAKE FOREST

301 S. Brooks Street
Wake Forest, NC 27587
t 919.435.9400

www.wakeforestnc.gov

PROCLAMATION PROMOTING NORTH CAROLINA PUBLIC POWER DURING PUBLIC POWER WEEK, OCTOBER 1 – 7, 2023

WHEREAS, public power meets the electric needs of 40 million Americans, almost 15 percent of electricity consumers; and

WHEREAS, North Carolina's public power communities provide homes, businesses and local government agencies with safe and reliable electricity employing sound business practices designed to ensure the best possible service; and

WHEREAS, many of North Carolina's 70 public power cities and towns have been electric providers for more than 100 years and provide 1.2 million citizens with safe, reliable power; and

WHEREAS, North Carolina's public power utilities are dependable institutions that provide excellent service and a commitment to community and they are valuable community assets that contribute to the well-being of the community and provide economic development opportunities; and,

NOW, THEREFORE, I, Vivian A. Jones, Mayor of the Town of Wake Forest do hereby proclaim the week of October 1-7 the 37th annual Public Power Week, a week to promote North Carolina's public power cities and towns for their contributions to their communities; and urge all citizens of Wake Forest to join with all public power systems in the United States in this celebration of public power.

This the 19th day of September 2023.

ATTEST:

Theresa Savary
Town Clerk

Vivian A. Jones
Mayor





Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-237-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: September 19, 2023

SUBJECT

Proclamation Recognizing Deacon Tyrone Moore

Recommendation:

Item Summary:

ATTACHMENTS

- [ProclamationRecognizingDeaconMoore_Sept2023.pdf](#)



TOWN *of* WAKE FOREST

301 S. Brooks Street
Wake Forest, NC 27587
t 919.435.9400

www.wakeforestnc.gov

PROCLAMATION

RECOGNIZING DEACON TYRONE MOORE

Whereas, Deacon Tyrone Moore has been a member of Ledge Rock Missionary Baptist Church since 1979; and,

Whereas, over these forty-four years, Deacon Moore has served as a faithful member always volunteering to maintain the lawn, fix anything that needed it, and making sure the Church was clean and spotless for every Worship Service; and,

Whereas, Deacon Moore has served as President of the Hospitality Ministry, has served in the Pastor's Aide Ministry, and has served in the Male Chorus; and,

Whereas, in 1987 he began serving as a Trustee and then was recommended to be a Deacon in 1989. He served as the Chairman of the Deacon Board for eighteen years; and,

Whereas, Deacon Moore has never met a stranger; he believes in unconditional love; he is always willing to help others and be a servant of the Lord. Deacon Moore walks always by faith and has been a true blessing to Ledge Rock Missionary Baptist Church and everyone he has met throughout the years.

Now, Therefore, I, Vivian A. Jones, Mayor of the Town of Wake Forest do hereby proclaim that Deacon Tyrone Moore is a blessing to our community and thank him for his service.

This the 1st day of September 2023.

Attest:

Town Clerk



Mayor



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-217-

Submitted by: Ella Dowtin

Submitting Department: Administration

Meeting Date: September 19, 2023

SUBJECT

Introduction of Candidates for the Planning Board

Recommendation:

Item Summary:

ATTACHMENTS

- [Summary Sheet_Candidates_Sept202319.pdf](#)

Agenda Item: Introduction of candidates for the Planning Board.

Summary: Candidates have been invited to the September 19, 2023, meeting to be introduced and share why interested in being appointed to the advisory board of their choice.

Attachment: None.



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-192-
Submitted by: Timothy Richards
Submitting Department: Planning
Meeting Date: September 19, 2023

SUBJECT

Public Hearing on LEGISLATIVE CASE RZ-23-01, 4Rivers - Wake Forest Self Storage, a conditional rezoning filed by Rob Caudle on behalf of Franklin Village, LLC, to rezone 2.64 acres located at 0 Friendship Chapel Road, being Wake County Tax PIN 1850066925, from General Residential 10 (GR10) to Highway Business Conditional District (HB-CD).

Recommendation:

Item Summary:

ATTACHMENTS

- [BOC Agenda Summary RZ-23-01.pdf](#)
- [RZ-23-01 Staff Report.pdf](#)
- [Attachment A - Neighborhood Meeting Information.pdf](#)
- [Attachment B - Application.pdf](#)
- [Attachment C - Maps.pdf](#)
- [Attachment D - Planning Board Recommendation and Plan Consistency Analysis.pdf](#)
- [Attachment E - Parking Generation Memorandum.pdf](#)
- [Exhibit 1 - Legal Description.pdf](#)
- [Exhibit 2 - Consistency Statement.pdf](#)
- [Exhibit 3 - 4Rivers - Wake Forest Self Storage Master Plan.pdf](#)

Agenda Item: Public Hearing on LEGISLATIVE CASE RZ-23-01, 4Rivers - Wake Forest Self Storage, a conditional rezoning filed by Rob Caudle on behalf of Franklin Village, LLC, to rezone 2.64 acres located at 0 Friendship Chapel Road, being Wake County Tax PIN 1850066925, from General Residential 10 (GR10) to Highway Business Conditional District (HB-CD).

Summary: A public comment session was held at the August 21, 2023, Planning Board meeting. The Planning Board voted 5-0 to find the request inconsistent with the Community Plan and not reasonable nor in the public interest and recommended disapproval of the zoning map amendment (rezoning) request. Planning staff presented the rezoning request to the Board of Commissioners at its September 5, 2023, work session.

Attachments: See Staff Report.



Staff Report

Case RZ-23-01: 4Rivers - Wake Forest Self Storage Conditional Rezoning

Meeting Date	September 19, 2023
Requested Actions	Consideration of the following items related to the Conditional Zoning request for 0 Friendship Chapel Road: 1. Act on Plan Consistency Statement 2. Rezone 2.64 acres on the Town of Wake Forest Zoning Map from General Residential 10 (GR10) to Highway Business Conditional District (HB-CD)
Case Manager	Tim Richards, Senior Planner - Development Services
Planning Board Recommendation	Recommended disapproval of the zoning map amendment request by a vote of 5-0. See Attachment D for the Planning Board Recommendation and Plan Consistency Analysis.

PUBLIC MEETINGS

Neighborhood Meeting	Public Comment Session	Public Hearing
March 14, 2023 (See Attachment A)	August 21, 2023	September 19, 2023

CASE INFORMATION

Applicant	Rob Caudle WithersRavenel 137 South Wilmington Street, Suite 200 Raleigh, NC 27615
Developer	4 Rivers Property Group 301 Fayetteville Street, Suite 1400 Raleigh, NC 27601
Property Owner	Franklin Village, LLC 8368 Six Forks Road, Suite 204 Raleigh, NC 27615
Location	On the Southwestern corner of the intersection of Jones Dairy Road and Friendship Chapel Road.

Addresses	0 Friendship Chapel Road
Wake County Tax PIN	1850066925
Acreage	2.64 acres
Zoning	Existing: General Residential 10 (GR10) Proposed: Highway Business Conditional District (HB-CD)
Land Use	Existing: Vacant Proposed: Storage – Self-Service
Corporate Limits	This application is outside the Town’s corporate limits and within the Town’s extraterritorial planning jurisdiction (ETJ). An annexation petition has not been filed at this time.
Community Plan Designation	Neighborhood Commercial Located within an Activity Center area centered at the Highway 98/Jones Dairy Road intersection.

See Attachment B for a copy of the application and Attachment C for Aerial, Zoning, and Land Use Maps. See Community Plan [page 40](#) in a description of Neighborhood Commercial areas and [page 48](#) for guidance on Activity Centers. See also Community Plan [page 66](#) for relevant policies on commercial development, [page 68](#) for relevant policies on parking, [page 69](#) for relevant policies on screening and buffering, and [page 70](#) for relevant policies on community character.

SURROUNDING LAND USES AND ZONING

	Land Use	Zoning
North	Commercial, Office/Service, and Automotive (Gateway Commons shopping center), Educational/Institutional (child day care, elementary and secondary school), Residential (townhomes),	Conditional Use Highway Business (CU-HB), Residential Mixed-Use Conditional District (RMX-CD)
South	Vacant	Open Space (OS), Residential Mixed-Use (RMX)
East	Vacant, Residential (single-family detached)	Conditional Use Highway Business (CU HB), Rural Holding District (RD), Residential Mixed-Use (RMX)
West	Vacant, Residential (townhomes, single-family detached)	Open Space (OS), Conditional Use General Residential 5 (CU GR5)

The proposed land use is generally **incompatible** with surrounding land uses.

The proposed zoning is generally **incompatible** with surrounding zoning.

See Attachment C for associated maps.

MASTER PLAN ANALYSIS

Parking	Required: Under UDO Chapter 9.4, for buildings of more than 50,000 square feet of floor area, Indoor Storage/Warehousing uses must provide off-street parking at a ratio of one parking space for every 2,000 square feet of gross floor area. The developer proposes 110,500 square feet of gross floor area, requiring a total of 55 parking spaces. Bicycle parking spaces are required at a ratio of two spaces per each 50 automobile parking spaces provided. Based on the proposed 12 automobile parking spaces, a total of two bicycle parking spaces are required. Proposed: The applicant proposes a zoning condition requiring a minimum of 11 off-street parking spaces for the development, and the Master Plan shows 12 spaces provided. The applicant proposes to provide two bicycle parking spaces. Attachment E is an engineer's memorandum submitted by the applicant as justification for the reduced parking. Summary: The proposed Master Plan does not comply with the minimum parking requirements in the UDO.
Public Utilities	Required: Under UDO Section 6.3.1, the developer must connect to the municipal water and sewer systems. Proposed: The proposed Master Plan shows connections to existing water lines on Friendship Chapel Road, and to an existing sewer line in Jones Dairy Road. Note that if the proposed rezoning is approved, annexation into the Town's corporate limits will be required prior to approval of Construction Plans. Summary: The proposed Master Plan complies with the public utility requirements in the UDO.
Roads	Required: Under UDO Section 6.6, street improvements are required to bring existing streets into conformity with the Town's Comprehensive Transportation Plan (CTP). The CTP identifies Jones Dairy Road as a Major Thoroughfare requiring a 4A cross section, which includes four travel lanes (two in each direction), a planted median, curb and gutter, a verge planted with street trees, and a multi-use path on each side of the street in this location. Friendship Chapel Road is shown as a Collector requiring a 3A cross section, which includes two travel lanes (one in each direction), center turn lane, curb and gutter, a verge planted with street trees, and a sidewalk on each side of the street.

	Under UDO Section 6.11.1, a Transportation Impact Analysis (TIA) is not required for the proposed development. Proposed: The developer proposes completing all street and frontage improvements necessary to bring the adjacent roadways into conformity with the CTP cross sections. Summary: The proposed Master Plan complies with the minimum roadway infrastructure requirements in the UDO.
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PROPOSED MODIFICATIONS OF STANDARDS

The table below summarizes modifications to UDO standards proposed by the applicant that would make the standards less restrictive.

Parking (Section 9.4)	Required: One off-street parking space for every 2,000 square feet of floor area, totaling 55 spaces for the proposed 110,500 square-foot building. Proposed: 12 off-street parking spaces. Summary: The current UDO standard does not distinguish between self-service storage facilities and other types of indoor storage and warehousing. The applicant has submitted a memorandum in support of a reduced parking ratio of 0.10 spaces per each 1,000 square feet based on the Parking Generation Manual (5th Edition), published by the Institute of Transportation Engineers, which provides a specific coefficient for mini-warehouse, another commonly used term for self-service storage facilities. <i>See Attachment E.</i>
Loading (Section 9.4.5.C)	Required: Required off-street loading spaces must be located to the side or rear of the lot to maximize the street exposure of the primary structure. Street side loading docks must be set back at least 70' from the property line abutting the street right-of-way. If visible from the street, loading areas must be screened on three sides by a minimum 6' tall solid, decorative fence, wall, or hedge. Loading spaces must not intrude into any portion of a required parking aisle. Proposed: The proposed Master Plan includes three off-street loading spaces located at the front of the lot approximately 36' from the front lot line at the street right-of-way. No screening of the loading spaces is proposed, other than the required parking area perimeter shrubs. Summary: The UDO standards for loading area location, configuration, and screening are designed to minimize visibility of these areas and their activities from the street, and to maximize street exposure of the primary building. The proposed Master Plan places the loading areas in a prominent, highly visible location at the front of the building.

Pedestrian/ Bicycle Connections (Section 6.5.3.A)	Required: Development abutting greenways must provide pedestrian/bicycle access at a minimum of every 600 feet when feasible. Proposed: The site abuts proposed greenways to the West and South of the site. No pedestrian/bicycle greenway access is proposed. Summary: The UDO standard requiring pedestrian/bicycle access to abutting greenways is intended to improve connectivity and access to people walking or riding a bicycle. Because the site is relatively small and located at a corner with nearby greenway connections from the sidewalk and multi-use path on the abutting street frontage, a degree of connectivity is already anticipated without the required on-site connections. The required on-site pedestrian/bicycle greenway connections would provide greater benefit were a more active, pedestrian-oriented development (e.g., retail, restaurants, mixed-use development), as called for in the Community Plan, to occur on the site.
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See Attachment B for zoning conditions proposed by the applicant.

ADDITIONAL PROPOSED ZONING CONDITIONS

Since the Planning Board public comment session, the applicant has added two new proposed architectural standards (see Attachment B). Proposed condition # 7 requires building façade colors to include a minimum of two compatible colors that complement the buildings in Gateway Commons. Proposed condition #8 requires building corners to include architectural features in their facades, with corners visible from public streets related to each other in terms glass elements and accent color.

COMPREHENSIVE PLAN CONSISTENCY

Community Plan (2022)	The proposed zoning map amendment request is inconsistent with the adopted 2022 Community Plan. The five main areas of inconsistency are: • Neighborhood Commercial areas (page 40): These areas are local-serving commercial nodes that provide surrounding residents with convenient access to day-to-day goods and services, including establishments like hair salons, cafes, dry cleaners, restaurants, and small grocery or convenience stores. New development should consist of vertical mixed-use buildings, with ground floor commercial uses and upper story residential or office uses. Development in these areas should support compact, pedestrian-oriented, mixed-use environments, with building scales compatible with adjacent residential areas, and should provide a transition in intensity from more intense commercial areas to residential neighborhoods. High levels of pedestrian and bicycle access to residential areas should be emphasized, with well-connected sidewalks, trails, and bicycle routes ensuring residents can easily access goods and services in the area without having to drive. Primary uses identified include commercial retail and service, food and drink, office, and mixed-use. Supporting uses identified include institutional and civic, entertainment and cultural, public gathering space, live-work units, and upper story residential units.
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	The proposed Storage – Self-Service use, which the UDO classifies as an Industrial/Wholesale/Storage use, is inconsistent with the types of uses envisioned for Neighborhood Commercial areas. The proposed site plan emphasizes parking and loading activities above all else along the main street frontage. Fundamentally, and in its particulars, the proposed rezoning is inconsistent with the Community Plan direction for Neighborhood Commercial areas. • Activity Center areas (page 48): Activity centers are unique focal points of the community that should comprise a wide variety of uses in a pedestrian-scale environment that enhance the quality of life, create a distinct sense of place, and provide a living experience unique to Wake Forest. As noted above, the proposed Master Plan shows parking and loading spaces at the front of the building, with the loading spaces bisecting the sidewalk along the front of the building, and without any of the UDO-required loading area screening. While the applicant has proposed conditions requiring glass sliding doors at the loading area, the use of at least two compatible colors in the building façade, and corner building features to create visual interest and consistent use of glass and accent colors, additional enhanced architectural standards above the baseline UDO standards to ensure the building is high-quality and that its scale and massing are appropriate have not been proposed. Overall, the automobile-oriented site design is inconsistent with UDO requirements and Community Plan guidance for Activity Centers and does not provide a distinct sense of place to support a living experience unique to Wake Forest. • Parking lots (page 68): Off-street parking should be located to the side or rear of the primary building, and pedestrian walkways should be provided in parking lots. Staff does not object to the amount of parking proposed; however, its location between the building and the street, and the loading area’s interruption of the sidewalk connecting parking on the eastern portion of the parking lot to the primary building entrances, run counter to the Community Plan direction for parking lots. • Screening and buffering (page 69): Utility, loading, outdoor storage, and trash disposal areas that would otherwise be visible from the right-of-way or adjacent development should be screened. As noted above, no screening is proposed for the loading area. • Community character (page 70): New development should be contextual to the existing character of the area in terms of scale, massing, setback, fenestration, and design features. Quality development should be emphasized along highly visible thoroughfares in the Town to reinforce its positive image. In accordance with the Land Use Plan, incompatible, high intensity uses should be directed away from low intensity residential uses. The proposed development site is located at a prominent corner abutting Jones Dairy Road, a major thoroughfare, to the East, an existing single-family residential neighborhood to the West, and the Gateway Commons shopping center to the North. The proposed, single-use, multi-story storage facility, proposed with the loading and parking areas facing the street and
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	without enhanced architectural standards, is inconsistent with the Community Plan's direction for community character.
Comprehensive Transportation Plan (2019)	The proposed zoning map amendment request is generally consistent with the Comprehensive Transportation Plan.
Historic Preservation Plan (2012)	The Historic Preservation Plan is not applicable to the zoning map amendment request.
Northeast Neighborhood Plan (2007)	The Northeast Neighborhood Plan is not applicable to the zoning map amendment request.
Park, Recreation, and Cultural Resources Master Plan (2015)	The Parks, Recreation, and Cultural Recourses Master Plan is not applicable to the zoning map amendment request.
Public Art Vision Plan (2009)	The Public Art Vision Plan is not applicable to the zoning map amendment request.
Renaissance Plan (2017)	The Renaissance Plan is not applicable to the zoning map amendment request.
<i>See Attachment D for detailed Plan Consistency Analysis. The Comprehensive Transportation Plan is not included in the Consistency Analysis since cross-sections are the only applicable element of the Plan. Other plans that are not applicable are not included in Attachment D.</i>	

STAFF RECOMMENDATION

The zoning map amendment request is generally **Inconsistent** with the relevant policies in the Comprehensive Plan, as noted in the discussion above, and **Disapproval** of the zoning map amendment request is reasonable and in the public interest because of that inconsistency and the exceptions to UDO standards requested by the applicant.

ATTACHMENTS

- Attachment A: Neighborhood Meeting Information
- Attachment B: Application
- Attachment C: Maps
- Attachment D: Planning Board Recommendation and Plan Consistency Analysis
- Attachment E: Parking Generation Memorandum

EXHIBITS

- Exhibit 1: Legal Description
- Exhibit 2: Consistency Statement
- Exhibit 3: 4Rivers - Wake Forest Self Storage Master Plan



Mark D. Frederick

Associate

Telephone: 919.828.4023

Direct Fax: 919.835.4552

markfrederick@parkerpoe.com

Atlanta, GA
Charleston, SC
Charlotte, NC
Columbia, SC
Greenville, SC
Raleigh, NC
Spartanburg, SC
Washington, D.C.

March 3, 2023

Re: Notice of Neighborhood Meeting

Neighboring Property Owners:

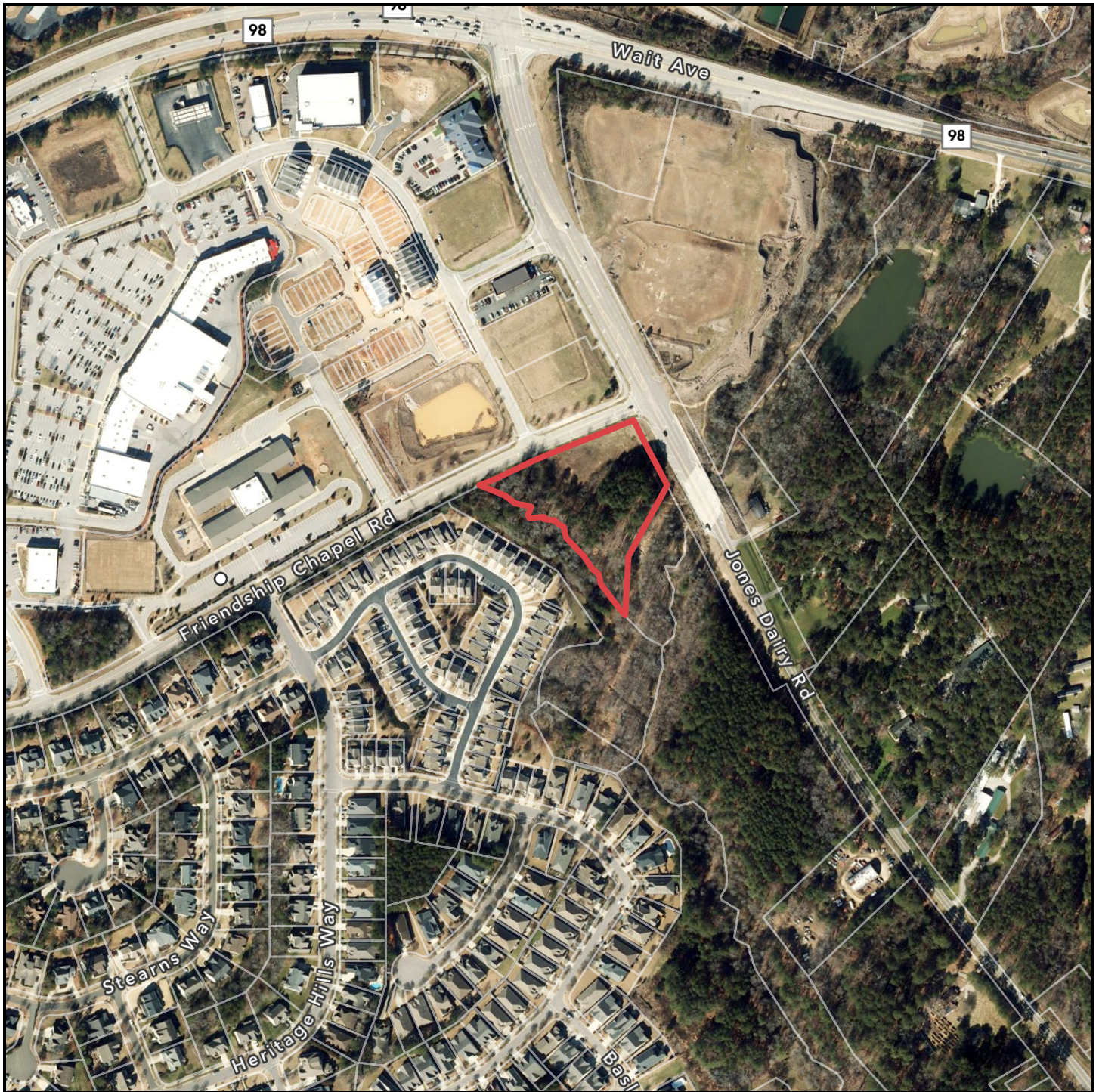
You are invited to attend a neighborhood meeting on March 14, 2023, at 6:00PM at the Fairfield Inn & Suites by Marriott Raleigh-Wake Forest, located at 12051 Retail Drive, Wake Forest, NC 27587. The purpose of the meeting is to discuss RZ-23-01, a requested rezoning of a parcel of land located at 0 Heritage Lake Road (PIN: 1850066925) (the "Site"). The Site is currently zoned General Residential-10 (GR10). This proposal would rezone the Site to Highway Business Conditional District (HB-CD) to allow for the construction of a multi-story self-storage facility. During the meeting, the applicant will describe the nature of the proposed rezoning request and field any questions from the public. Enclosed are: (1) a vicinity map outlining the location of the parcel; and (2) a copy of the preliminary site plan.

Prior to the legislative public hearing of any rezoning application, the Town of Wake Forest requires that a neighborhood meeting be held for all property owners within 500 feet of the area requested for rezoning. Any landowner or community member who is interested in learning more about this project is invited to attend. This project will be taken up for future consideration by the Town's Planning Board for a public comment session and the Town's Board of Commissioners for a public hearing. You will be receiving a notices from the Town regarding the public comment session and public hearing at later dates.

If you have any questions about this rezoning, please contact me at (919) 835-4023 or via email at markfrederick@parkerpoe.com.

Thank you,

Mark D. Frederick



0 Heritage Lake Road



0 200 400 800 ft
1 inch equals 400 feet

Vicinity Map

Disclaimer
iMaps makes every effort to produce and publish the most current and accurate information possible. However, the maps are produced for information purposes, and are **NOT** surveys. No warranties, expressed or implied, are provided for the data therein, its use, or its interpretation.

0 Heritage Lake Road - 500ft Property Owner List

OWNER	ADDR1	ADDR2	ADDR3
951 GATEWAY COMMONS LLC	7610 SIX FORKS RD STE 200	RALEIGH NC 27615-5049	
ALLEN, KIMBERLY ALLEN, BRADLEY	1412 KIRKWOOD HILL WAY	WAKE FOREST NC 27587-4556	
AMEGASHIE, AISLEY BAILEY, JENNIFER	1026 GATEWAY COMMONS CIR	WAKE FOREST NC 27587-8688	
ARAUJO, JUAN ELIAS DIAZ RIVAS, YURUBI COROMOTO FUENMAYOR	421 HAMMOND OAK LN	WAKE FOREST NC 27587-4561	
BALD, DAVID DOUGLAS BALD, JUDY RICHARDSON	353 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
BANDARUPALLI, SUSHMA RAMANUJAM, VARUN	1022 GATEWAY COMMONS CIR	WAKE FOREST NC 27587-8688	
BARBER, LISA F BARBER, SHAWN A	628 WALTERS DR	WAKE FOREST NC 27587-6179	
BISHOP, JONI LEE	321 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
BRASWELL CUSTOM HOMES INC	PO BOX 40159	RALEIGH NC 27629-0159	
BRASWELL, ANTHONY BRASWELL, SHANNEN FIELDS	614 GATEWAY XING	WAKE FOREST NC 27587-8597	
BREMER, MARILYN J	408 HAMMOND OAK LN	WAKE FOREST NC 27587-4560	
CANTU, JUAN A AGUILLON, DIANA	1424 KIRKWOOD HILL WAY	WAKE FOREST NC 27587-4556	
CARTER, TERESA ANN	373 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
CHARTER DEVELOPMENT COMPANY LLC	3850 BROADMOOR AVE SE STE 201	GRAND RAPIDS MI 49512-3975	
COBB, RANDY	1400 KIRKWOOD HILL WAY	WAKE FOREST NC 27587-4556	
DENNIS, CHRISTINA M	2027 HOPETON AVE	RALEIGH NC 27614-7303	
DODGSON, DAVID A BIRD, MEREDITH SL	618 GATEWAY XING	WAKE FOREST NC 27587-8597	
EICHORN, CONNIE M	412 HAMMOND OAK LN	WAKE FOREST NC 27587-4560	
ESCLAMADO, RAMON M ESCLAMADO, LORRAINE K	329 DIMOCK WAY	WAKE FOREST NC 27587-4478	
ETTS, CHRISTOPHER CALMA, MARIA FAUSTINA	3 EDITH CT	PORT JEFFERSON STATION NY 11776-4467	
FOOD LION LLC	ATTN REAL ESTATE DEPT	PO BOX 1330	SALISBURY NC 28145-1330
FOX, CHARLES T FOX, MARY A	425 HAMMOND OAK LN	WAKE FOREST NC 27587-4561	
FRANK, JON FRANK, MARGUERITE	624 GATEWAY XING	WAKE FOREST NC 27587-8597	
FRANKLIN VILLAGE LLC	PO BOX 97487	RALEIGH NC 27624-7487	
FREEDMAN, RONALD D FREEDMAN, DARLENE L	333 DIMOCK WAY	WAKE FOREST NC 27587-4478	
GATEWAY FOREST LLC	PO BOX 31827	RALEIGH NC 27622-1827	
GRIFFIN, DOREEN LASHAI DENNIS, JUANITA	600 GATEWAY XING	WAKE FOREST NC 27587-8597	
HARMENING, ROBERT J HARMENING, JOAN L	341 DIMOCK WAY	WAKE FOREST NC 27587-4478	
HAVEN, DANIEL T	509 HAMMOND OAK LN	WAKE FOREST NC 27587-4563	
HEIZMAN, JAMES M HEIZMAN, THERESA	321 DIMOCK WAY	WAKE FOREST NC 27587-4478	
HOLLAND, BARBARA	316 HAMMOND OAK LN	WAKE FOREST NC 27587-4558	
HOYOS, MARIA FERNANDA	317 DIMOCK WAY	WAKE FOREST NC 27587-4478	
INIGUEZ, MARIA J VEJAR TELLO, JUAN P CUEVA	1429 KIRKWOOD HILL WAY	WAKE FOREST NC 27587-4557	
JACKMAN, SHARON B JACKMAN, ROLLIE W	325 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
JACKSON, SHELLEY L	1420 KIRKWOOD HILL WAY	WAKE FOREST NC 27587-4556	
JOHNSON, DAVA	329 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
JOYNER, HENRY EDWARD JOYNER, CAROL P	303 JONES DAIRY RD	WAKE FOREST NC 27587-5979	
KERR, PAUL A KERR, JOSEPHINE A	1416 KIRKWOOD HILL WAY	WAKE FOREST NC 27587-4556	
LANDING AT HERITAGE OWNERS ASSN INC THE	CHARLESTON MGMT CORP	PO BOX 97243	RALEIGH NC 27624-7243
MARKS, KELLY A	365 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
MARSH, OSWALD MARSH, EUADORA	333 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
MCKEE HOMES LLC	4208 SIX FORKS RD STE 810	RALEIGH NC 27609-6092	
MCNULTY, THOMAS C MCNULTY, ANDREA K	1404 KIRKWOOD HILL WAY	WAKE FOREST NC 27587-4556	
MELUKOTA, VENKATA RAVI GOLLURU, VARDARAJAN	904 MAYNARD CREEK CT	CARY NC 27513-3505	
MESSINA, JOHN PHILIP MESSINA, KAREN MARIE	70 WEST ST APT B16	HARRISON NY 10528-4016	
MEYER, MANUELA M	505 HAMMOND OAK LN	WAKE FOREST NC 27587-4563	
MIOLLA, WILLIAM J MIOLLA, BRENDA T	501 HAMMOND OAK LN	WAKE FOREST NC 27587-4563	
MONDEN, WILLIAM MONDEN, KENDRA D	610 GATEWAY XING	WAKE FOREST NC 27587-8597	
MYERS, ANTHONY JOHN MYERS, LUISA	1421 KIRKWOOD HILL WAY	WAKE FOREST NC 27587-4557	
MYRLAK, RICHARD M MYRLAK, RUBY M	321 MORTIMER AVE	RUTHERFORD NJ 07070-2219	
NAVIN, BRADLEY P NAVIN, RHIANNON	29 PRYER PL	NEW ROCHELLE NY 10804-4503	
NC WAKE PROPERTIES INC	230 CAPCOM AVE STE 103	WAKE FOREST NC 27587-6510	
NDUNGU, ROBERT W GATHEMBE, CAROLINE	513 HAMMOND OAK LN	WAKE FOREST NC 27587-4563	
O'CONNOR, BRIAN	345 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
OLADIPO, TAOFIKAT A	604 GATEWAY XING	WAKE FOREST NC 27587-8597	
PARKER, NATALIE	622 GATEWAY XING	WAKE FOREST NC 27587-8597	
PEARCE, DOROTHY M AYCOCK HEIRS	MICHAEL R AYCOCK EXEC	255 JONES DAIRY RD	WAKE FOREST NC 27587-7619
PENUMARTHI, VENKATA GOUTHAM PENIMARTHI, LAKSHMI S	1024 GATEWAY COMMONS CIR	WAKE FOREST NC 27587-8688	
PERIATHAMBI, INIGO	192 OAK HAVEN LN	APEX NC 27523-5802	
PETRUCCELLI, THOMAS C PETRUCCELLI, BETSY M	337 DIMOCK WAY	WAKE FOREST NC 27587-4478	
PORCELLI, JOSEPH M PORCELLI, ELISA M	313 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
POTHIREDDY, JAYANTH POTHIREDDY, HEMALATHA	3008 DRESSAGE DR	GREENSBORO NC 27410-9937	
PRIMAX PROPERTIES LLC	1100 E MOREHEAD ST FL 4	CHARLOTTE NC 28204-2815	
PUDMANSKI, JEROME W PUDMANSKI, ROSALIE A	400 HAMMOND OAK LN	WAKE FOREST NC 27587-4560	
PURSELL, NANCY L PURSELL, DALE G	349 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
RAO, ARCHANA GUPTA, DIPTESH	616 GATEWAY XING	WAKE FOREST NC 27587-8597	
ROSENBERG, RONALD M ROSENBERG, LORIE B	405 HAMMOND OAK LN	WAKE FOREST NC 27587-4561	
SAMUELSON, JONATHAN SAMUELSON, MARCIE	602 GATEWAY XING	WAKE FOREST NC 27587-8597	
SANTOS ALVERNIA, LUIS DOS NEXANS, LAURA LUCENA	361 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
SELTMANN, ELLIOTT W SELTMANN, JUDITH A	317 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
SHANKLAND, ROBERT JOSEPH SHANKLAND, ESTHER ANN	404 HAMMOND OAK LN	WAKE FOREST NC 27587-4560	
SHANKLAND, SHERWOOD SHANKLAND, EUNICE	357 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
ST CLAIR, DAVID ST CLAIR, LINDA	1428 KIRKWOOD HILL WAY	WAKE FOREST NC 27587-4556	
STREINER, PATRICIA C	1425 KIRKWOOD HILL WAY	WAKE FOREST NC 27587-4557	
TABI LLC	345 JONES DAIRY RD	WAKE FOREST NC 27587-5979	
TACHARAKSPONGSE, RAKTHAM TACHARAKSPONGSE, RUCHIRA	401 HAMMOND OAK LN	WAKE FOREST NC 27587-4561	
TB GATEWAY COMMONS WAKE FOREST LLC	121 IOWA AVE APT 3A	WHITEFISH MT 59937-2312	
TERAN, GERARDO FLORES SEPULVEDA, CLAUDIA P ELIZONDO	325 DIMOCK WAY	WAKE FOREST NC 27587-4478	
TOWN OF WAKE FOREST	301 BROOKS ST	WAKE FOREST NC 27587-2901	
VINSON, CODY STEPHEN WARD, SHAUN MICHAEL	1018 GATEWAY COMMONS CIR	WAKE FOREST NC 27587-8688	
VISSAMRAJU, KRISHNA SUDHA REDDY AVULA, RUPESH KUMAR	1028 GATEWAY COMMONS CIR	WAKE FOREST NC 27587-8688	
WAKE FOREST TOWN OF	301 BROOKS ST	WAKE FOREST NC 27587-2901	
WEIGHTMAN, ANDREW	337 HAMMOND OAK LN	WAKE FOREST NC 27587-4559	
YANICELLI, HECTOR D YANNICELLI, ANA	405 VODIN ST	WAKE FOREST NC 27587-4482	
YARRAGUNTA, SRIKANTH CHIRUMAMILLA, KRISHNA PRIYA	1104 HOLLAND BEND DR	CARY NC 27519-8221	
YAVDOSHYNAK, VASYL YAVDOSHYNAK, OLGA	413 HAMMOND OAK LN	WAKE FOREST NC 27587-4561	
ZHAO, CHUNHUI ZHOU, LI	505 HALLBURG CT	WAKE FOREST NC 27587-4469	
Heritage Landing by Pulte Homes	301 Dimock Way	Wake Forest NC 27587	

MEMORANDUM

Date: March 17, 2023
Project: 4Rivers, Wake Forest SelfStorage Rezoning
Jones Dairy Road and Friendship Chapel Road
Subject: March 14, 2023 Community Meeting

ATTENDANCE:

Development Team

- Mark Frederick, ParkerPoe
- Hunter Dawkins, 4Rivers
- Amber Mason, PE, WithersRavenel
- Karen Mallo, AICP, WithersRavenel

Community Members

- See attached attendance sheet

Pre-meeting discussion and concerns voiced:

- Height
- Noise generation
- Lights
- Proximity to homes
- Residents told it was going to be a greenway

MEETING DETAILS:

Meeting Began 6:00 PM

Mark Frederick opened the meeting and introduced Hunter Dawkins, applicant and contract purchaser.

Mark gave an overall description of the planning process related to the project:

- Rezoning process
- How property can be used
- Owner requests a change in the district:
 - to change use
 - to change regulations
- Changing to build a self-storage facility
- Submitted in January-site plan and rezoning application
- Application and site plan reviewed by town. Town provides comments and team revises
- Neighborhood meeting (required)
 - 500' feet had to be noticed

- provide information regarding project
- List and identify major concerns
- Applicant wants to listen
- Look at plans in details
- Resubmit to town Planning Board-recommendation before going to Public Hearing and Board of Commissioners

PROJECTDETAILS

- 25 acres
- R-10, allows up to 10 units/acre and a variety of residential uses
- Requesting HB, to allow retail services and commercial uses
- However, asking for conditional zoning which will limit use to only self- storage as part of conditions
- Other conditions:
 - Parking (11 parking spaces)
 - Tied to specific use & specific site plan
 - 3 story building
 - Loading inside
- Town requires design standards such as:
 - No outdoor storage
 - 7 AM- 10PM
 - Must look like office (architecturally)
 - Buffers (20' Landscape- all vegetation will be preserved as owner must supplement if not enough)
- Town property is adjacent → which essentially provides another 100' of buffer
- Wetlands, unable to build in that area

Town looks to plan (community plan) and adopts a future land use. This specific property was left off original, intend to be "neighborhood commercial" (map to be adopted) Need to answer questions, "Is project consistent w/ plan"?

Building elevations shown and explained

QUESTIONS / COMMENTS / DISCUSSION

1. Will the Rezoning affect the remaining/adjacent property ? *No, rezoning affects only current property. The Town owns the adjacent property.*
2. If Town wants property commercial why do you need it to be rezoned ? *This is the difference between the zoning map and the Community Plan designation. Right now its zoned residential but designated for future commercial uses when rezoned.*
3. What are the construction logistics? When is start and finish? *It's a 10 month build (less than 6 months outside)*

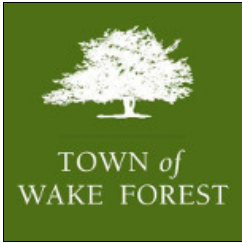
4. How tall is the building? *4 story (basement) on backside (Jones Dairy) but only 3 story on Friendship Chapel*
5. Concern of muddy roads during construction. *Contractors will use water trucks during construction to keep roads clear.*
6. Lighting- Don't want it lit up. When will lights be on? *We need to meet the Town standards for lighting. Lights will be downward facing and shielded. Don't need on at night, except as needed for safety. Building is secured.*
7. Entrance on Jones Dairy Road vs Friendship Chapel Rd.; Why not on Jones Dairy Road? *NCDOT and Town require driveway separation. Not enough room (frontage) to put driveway on Jones Dairy Road.*
8. How many storage units inside? *600 units. Typical user-load & visit again in 6 months Low traffic generation.*
9. Will there be a dumpster on site? *Required to provide a dumpster by the Town. Shielded from view with lid, wall, landscaping.*
10. Fencing will be provided? *Yes, 6' high opaque fence on west property line ; no security fencing as the storage units are inside the secured building.*
11. So it's this or apartments? *Residential is allowed by right or could be zoned to allow another commercial use The benefit of this proposal is that it is a low impact use.*
12. Is the project across the street going to happen? Food lion, day care? *Not part of this project.*
13. What kind of truck traffic? Is there room to move trucks on the site? *Limited to Box Trucks. Radii has been tested.*
14. Parking on street? *Not proposed as part of this project, and not permitted on this type of public street.*
15. When is next meeting? *We anticipate Planning Board May. Board approval August.*
16. Developer/owner? What's involvement in project? *Developer does not own yet, will buy property & own the building but will contract 3- party for operation (eg CubeSmart)*
17. Lighting and signs- make sure not neon. *Will meet Town standards*
18. Is the depiction accurate? *Yes, renderings are accurate but can be slightly altered once they go before Architectural Review Board.*

19. Friendship Chapel Road and Jones Dairy Road setbacks. *30' is provided.*
20. W here is fence? W hat additional landscaping? *Fence is along western property line. Additional landscaping will be required in the buffers if the existing vegetation does not meet the planting standards.*
21. W hat are the surfaces on the building? The front and side are adjacent to their houses- could those be painted or a mural of trees? *Development team will look at whether materials/color can be changed*
22. You should do a financial study on 2 story vs. 3 story w/basement. *Site constraints require vertical construction versus sprawling out across site.*
23. W ho will be doing construction? *Contractors that the applicant has used in the past.*
24. W ill you disturb wetlands? *No. We cannot-control by state*
25. Do you have an Environmental impact report and has it been submitted? *We will have to submit w/the engineering plans, stormwater, soil erosion & control. Will meet & exceed the requirements*
26. W ill the storage units be allowed to be used for other purposes (i.e. band practice? *Not permitted. Professional on -site management company will be on site, and all users required to sign contracts that prohibit those types of activities.*
27. Is there demand for more storage units? *Market can support additional storage units based on our analysis. More people are moving to the area, more people work from home and need additional storage, more housing in the area with smaller footprint/less storage, and small business needs.*
28. Traffic light at intersection with Jones Dairy Road? W ith the new Food lion going in up? *Up to DOT to decide after warrant analysis.*
29. Can a rendering of the elevation from the view of the houses to the west be provided? *Yes*
30. Next steps? *Finish staff review & then the public hearings before the Planning Board and Board of Commissioners.*

Meeting ended approximately 6:55 PM

RZ-23-01: Neighborhood Meeting Sign-In Sheet

<u>Name</u>	<u>Address</u>	<u>Email</u>
Sharon + Roland Jackman	325 Hammond Oak lane Wake Forest NC 27587	sharon@sharonjackman.com
Judy + David Bald	353 Hammond Oak W.F.	Davidbald1@hotmail.com
Sandra + Conrad Navin	1408 Kirkwood Hill Way	SANNAVIN2025@gmail.com
ROBERT SHANKLAND	404 HAMMOND OAK LN	ROBSHANKLAND@GMAIL.COM
SHERWOOD SHANKLAND	357 HAMMOND OAK LN.	SherwoodShankland/47@gmail.com
EUNICE SHANKLAND	———— " ————	estankland.es@gmail.com
TOM McNulty	1404 Kirkwood Hill way	Tamcnulty@verizon.net
Josie + Paul Kerr	1416 Kirkwood Hill Way	jokerr46eaol.com
Hector Yannicelli	147 Hammond Oak Ln	d.yannicelli5@gmail.com
Teresa Carter	373 Hammond Oak Ln.	t.carter101@yahoo.com
David Dodgson	618 Gateway Crossing Lane	adodgsonpt@gmail.com
Meredith Bird	618 Gateway Crossing Lane	mslbird@gmail.com
JANET CONWAY ROSE	1028 AUSTIN RIDGE PKWY	janetcrose@gmail.com



Conditional District Rezoning Application

(Conditional District Rezoning - Planning Board Workflow)

Town of Wake Forest, NC
301 S. Brooks St.
Wake Forest, NC 27587-2932
TEL (919) 435-9510 | FAX (919) 435-9539

Project Overview

#937204

Project Title: 4Rivers - Wake Forest Self Storage
Application Type: Conditional District Rezoning
Workflow: Conditional District Rezoning - Planning Board

Jurisdiction: Town of Wake Forest (Wake County)
State: NC
County: Wake

Submittal Requirements

A submittal checklist is available to view additional documents which are required to submitted with this application. After answering the application questions, you will be asked to upload the required documents.

[VIEW CONDITIONAL DISTRICT REZONING
SUBMITTAL CHECKLIST](#)

Missing items will result in the application being declined and returned to the applicant to resubmit. A revised and complete application including all missing items must be received or the application will be not be deemed complete and routed for review.

Please confirm you have reviewed the associated submitted checklist for this permit and confirm you will submit all documents required on the submittal checklist: Yes

Pre-Application Meeting

Has a pre-application conference been held?: Yes

*Note: This type of project requires a pre-application conference be completed prior to official submittal. If this has not been completed, please return to the home screen and select **Pre-Application Conference** from the application type drop down list in order to schedule your required meeting.*

Pre-Application Conference Date: 12/06/2022

Staff Member Met With: Patrick Reidy

IDT Project Number: RZ-23-01

Address & Basic Site Information

Please Note:

In some cases, a parcel address may not verify. In the event that our system is unable to verify the address you enter, please submit the project as an *Unverified Parcel* and provide zoning and land use information as requested below. For verified addresses, the zoning and land use information will be added to the application automatically (you do not need to provide it below).

Project Address or PIN: 1850066925 (Unverified)

Tax PIN:

Acreage: 2.64

Name of Existing Development/Subdivision (if applicable--

for reference only):

For unverified addresses/parcels only, please provide below 1) the current use of the parcel, 2) the zoning district(s) it is in, and 3) any overlay districts that apply. Reference the [zoning map](#) and the [overlay districts map](#) on the town's website.

Current Use & Zoning (required only if address/parcel is unverified):

Vacant. GR10

*Note: Projects falling outside the limits of the Town or ETJ will be required to submit an annexation petition in conjunction with their project submittal. In this case, please return to the home screen and select **Annexation Petition** from the application type drop down.*

GIS Site Information (Automatically Generated - Not Available for Unverified Addresses)

Parcel Area:

Wake Forest (WF):

Base District:

In SH2-O Overlay:

In TND Overlay:

In HL-O Overlay:

In National Register of Historic Places:

Current Use:

Planning and Zoning:

In SH1-O Overlay:

In Water Supply Watershed Protection Overlay:

In SF Overlay:

In MVCP-O Overlay:

In Flood Hazard Area:

Additional Zoning Information

Currently a Conditional District?: No

Currently a Conditional Use?: No

Is there an existing Special Use Permit for the Property?: No **Related Town of Wake Forest Case Numbers:** SP-23-16

Project Contacts

Please enter all project contacts related to your application.

This is an important step to ensure all members of the applicant team receive email notifications associated with the project which may include comments, requested revisions, scheduled meetings or hearings, and final decisions. This also informs Town staff of the team members assigned role with the project.

Project Contact - Applicant

Rob Caudle
WithersRavenel
137 S Wilmington Street, 200
Raleigh, NC 27601
P:9194693340
rcaudle@withersravenel.com

Project Contact - Developer

Hunter Dawkins
4 Rivers Property Group
301 Fayetteville St, Suite 1400
Raleigh, NC 27601
P:704-281-8959
hdawkins@4riverspg.com

Project Contact - Property Owner

Andrew Ammons
Franklin Village LLC
8368 Six Forks Road, Suite 204
Raleigh, NC 27615
P:919-845-6415
markfrederick@parkerpoe.com

Project Contact - Engineer

Erin O'Rawe
WithersRavenel
137 S Wilmington Street, Suite 200
Raleigh, NC 27601
P:919-469-3340
eorawe@withersravenel.com

Project Contact - Attorney

Mark Frederick
Parker Poe Adams & Bernstein
301 Fayetteville Street, Suite 1400

Project Contact - Other

Amber Mason
Withers Ravenel
137 S Wilmington Street, Suite 200
Raleigh, NC 27601
P:919-469-3340
amason@withersravenel.com

Transportation Impact Analysis

As per Section 6.11.1 of the UDO is the project required to provide a Traffic Impact Analysis (TIA)? No

Was the TIA reviewed in a separate permit prior to this application?:

Project Number:

For projects requiring a TIA, a separate TIA application must be submitted in conjunction with this application. Please review the [TIA submittal checklist](#) and submit a ***Transportation Impact Analysis Review*** application in IDT.

 If the request is to a Conditional District (CD), this application should be accompanied by a master plan that includes land use, existing conditions, buildings, lots, etc. per Chapter 15 of the UDO. In addition, please provide a narrative of the proposed use and list any proposed conditions.

Proposed Conditional Zoning District: NB-CD, Neighborhood Business

Proposed Land Use:
Storage -- Self-Service

Proposed Number of Lots: 1

Number of Buildings: 1

Number of Single-Family Lots: 0

Number of Townhome Lots: 0

Number of Multi-Family Units: 0

Number of Stories: 4

Square Footage of All Buildings (non-residential): 110500

Plan Information - Conditional Rezoning

Description of Request:

Request to rezone PIN 1850066925 from GR10 to HB-CD.

Initial Proposed Conditions Offered by Applicant:

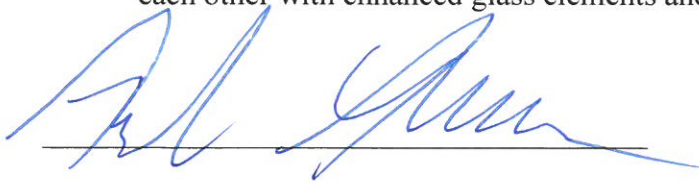
See attached list of Proposed Conditions signed by the landowner.

Justification of Consistency with Comprehensive Plan:

This property is mapped on the Community Plan within the Neighborhood Commercial category. This request is consistent with the Neighborhood Commercial designation because it will provide the surrounding residential area with convenient access to a self-service storage facility. The UDOs architectural conditions will ensure the scale and architecture of the building is compatible with the surrounding area. As recommended by the Neighborhood Commercial designation, the rezoning site is appropriately located at the intersection of Jones Dairy Road and Friendship Chapel Road.

RZ-23-01: Jones Dairy Road Rezoning
Proposed Zoning Conditions

1. The corresponding site master plan is a condition of the rezoning. Amendments of the site master plan shall require a rezoning amendment unless the Administrator finds the modification to be minor and in keeping with the spirit and intent of the adopted site master plan.
2. The landowner shall complete all improvements to the adjacent roadways and roadway frontages as shown on the corresponding site master plan and as identified in the Town of Wake Forest Comprehensive Transportation Plan. Such improvements shall be completed from the center of the roadway to the site property line, or, where approved by the town's Planning and Engineering departments, the landowner may submit a fee to the town in lieu of completing all or part of the improvements.
3. The off-street parking requirements in UDO Section 9.4.B shall be modified to allow a minimum of eleven (11) off-street parking spaces.
4. Required off-street loading spaces are exempt from the standards of UDO Sections 9.4.5.C(1), (2), (3), and (5).
5. Building entrances adjacent to off-street loading spaces shall provide access to the building through sliding glass doors.
6. The development shall be exempt from the pedestrian/bicycle accessway requirements in UDO Section 6.5.3.A.
7. In addition to the requirements of UDO 5.6.2.C, the façade colors shall include a minimum of two compatible colors. All colors shall also complement the buildings located on PIN 1840972490 (Gateway Commons).
8. The façade of building corners shall include enhanced architectural features to create a visual interest, and each building corner visible from public streets shall maintain a relation to each other, but are not required to be identical. Building corners shall relate to each other with enhanced glass elements and accent color.



Andrew Ammons, Manager

Property Owner: Franklin Village, LLC

Date: August 22, 2023

TOWN OF WAKE FOREST

AGENT AUTHORIZATION FORM:

Application #: _____

Submittal Date: _____

Franklin Village, LLC is the owner of the property for which the attached application is being submitted:

- ☒ General Use Rezoning or Conditional District Rezoning
☐ Site Master Plan
☐ Subdivision Master Plan
☐ Construction Drawings
☐ Variance
☐ Major Architectural Review

The property is located at: 0 Heritage Lake Road (PIN 1850066925)

The agent for this project is: Rob Caudle, WithersRavenel

☐ I am the owner of the property and will be acting as my own agent.

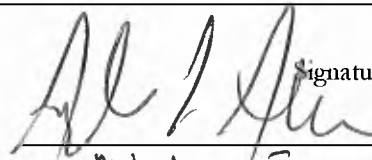
Name: Andrew L Ammons, on behalf of Franklin Village, LLC

Address: 8368 Six Forks Road, Suite 204 Raleigh, NC 27615

Telephone Number: _____

Fax: _____

Email Address: _____

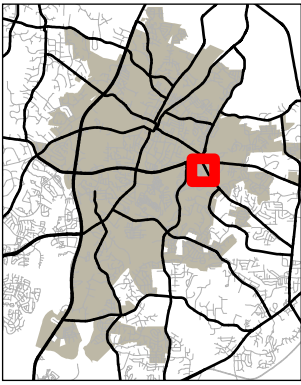

Signature(s) of Owner(s):
Andrew L. Ammons, Franklin Village, LLC

Print or type name(s):

Attach additional sheets if there are additional owners.

***Owner of record as shown on the latest equalized assessment rolls of Wake County. (An option to purchase does not constitute ownership). If ownership has been recently transferred, a copy of the deed must accompany this authorization.**

Last update: August 2018



Aerials



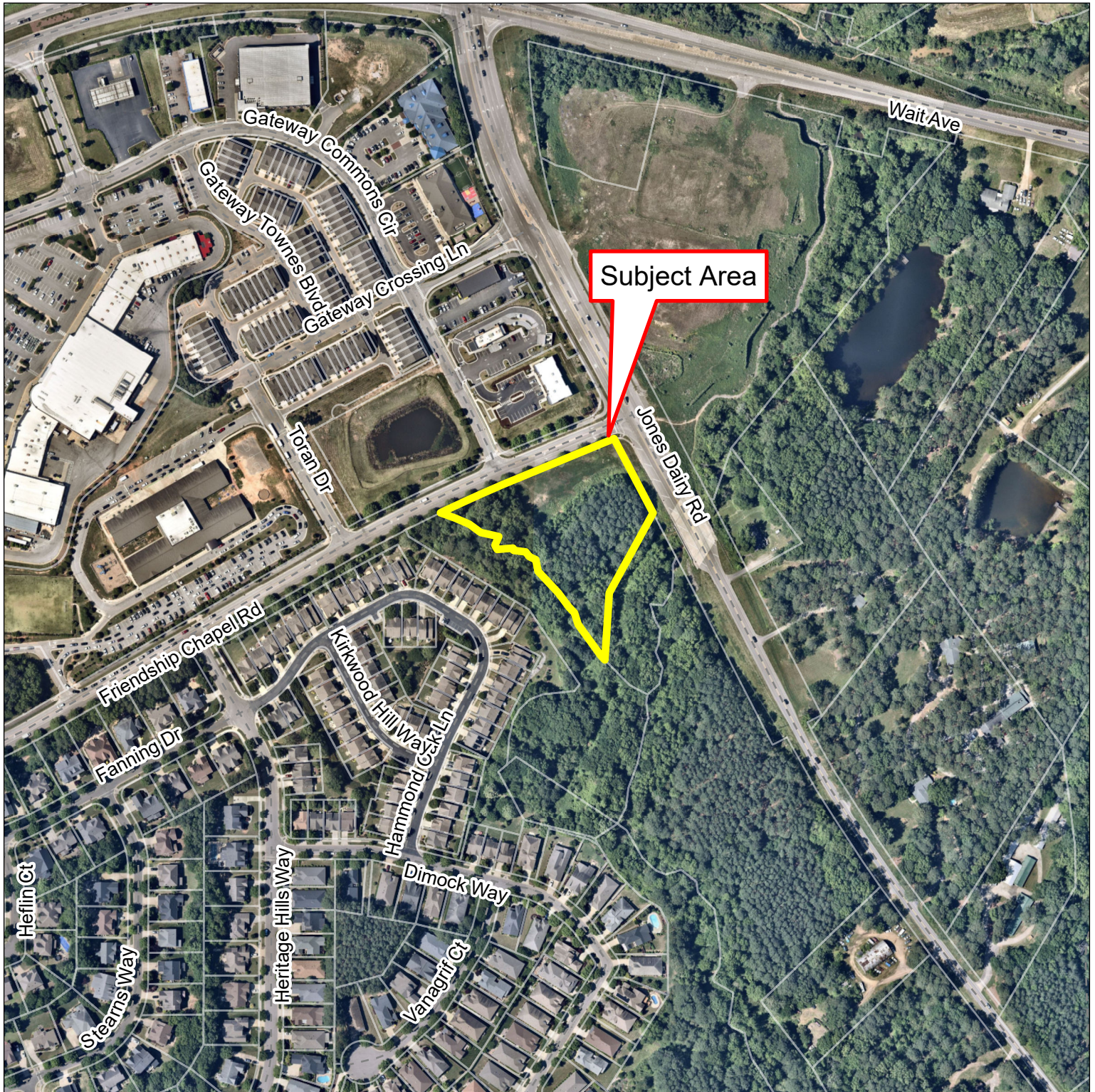
TOWN of
WAKE FOREST

RZ-23-01

Jones Dairy Road Rezoning

PIN: 1850066925

7/25/2023

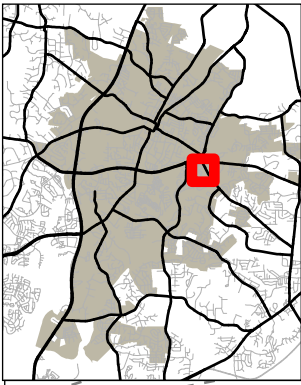


Please note that this map is intended for illustrative purposes only.
For specific inquiries regarding zoning boundaries, contact the
Town Wake Forest Planning Department at 919-435-9510.

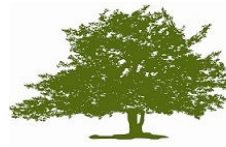
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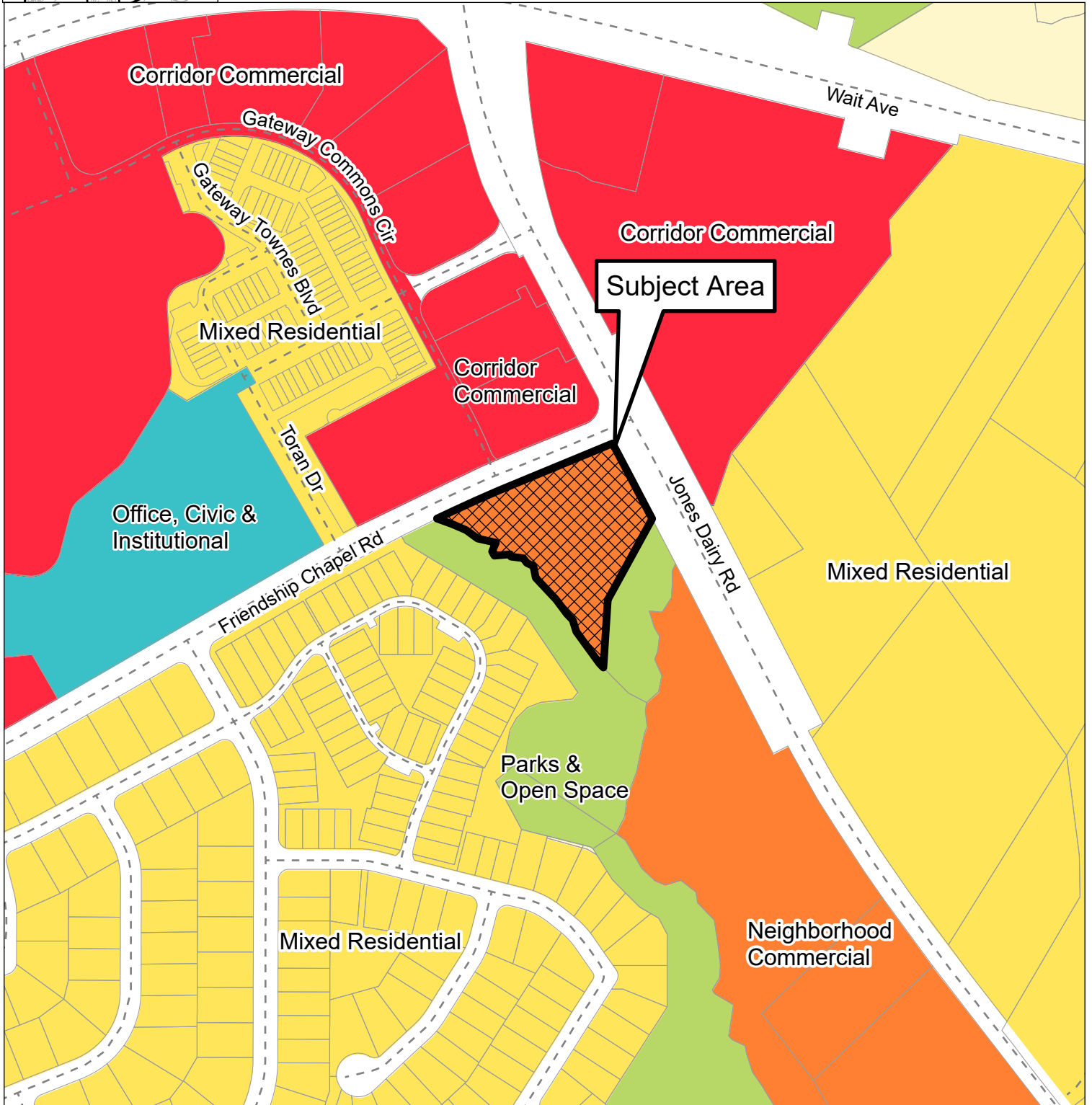
Land Use Plan



TOWN of
WAKE FOREST

RZ-23-01 Jones Dairy Road Rezoning PIN: 1850066925

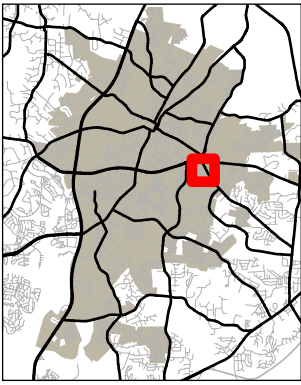
7/25/2023



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0 500 1,000
Feet





Current Zoning



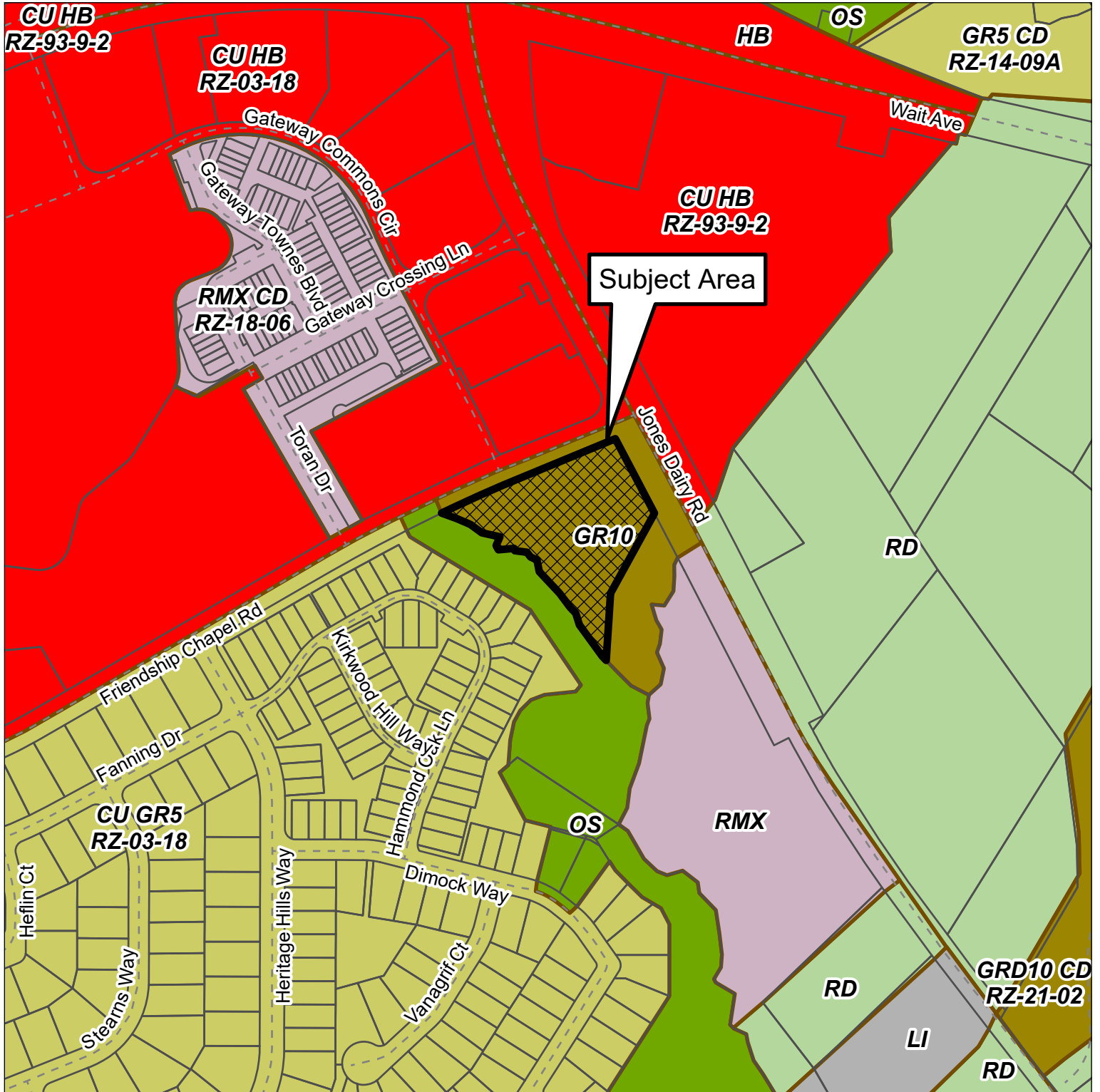
TOWN of
WAKE FOREST

RZ-23-01

Jones Dairy Road Rezoning

PIN: 1850066925

7/25/2023



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Town Wake Forest Planning Department at 919-435-9510.

0 500 1,000 Feet





TOWN of WAKE FOREST

Report Requirements:

Per NCGS 160D-604, all proposed amendments to the zoning ordinance or zoning map shall have a written report provided from the Planning Board to the Board of Commissioners within 30 days of referral of the amendment to the Planning Board, or the Board of Commissioners may proceed in its consideration of the amendment without the Planning Board report. Furthermore, in no case is the Board of Commissioners bound by the recommendations, if any, of the Planning Board.

Per NCGS 160D-604, the Planning Board shall advise and comment on whether the proposed zoning amendment is consistent with all applicable officially adopted plans, and provide a written recommendation to the Board of Commissioners that addresses plan consistency and other matters as deemed appropriate by the Planning Board, but a comment by the Planning Board that a proposed amendment is inconsistent with the officially adopted plans shall not preclude consideration or approval of the proposed amendment by the Board of Commissioners.

GENERAL INFORMATION

Applicant: Rob Caudle, WithersRavenel

Owner: Franklin Village, LLC

Requested Action: Rezone 2.64 acres on the Town of Wake Forest Zoning Map from General Residential 10 (GR10) to Highway Business Conditional District (HB-CD)

Existing Zoning: General Residential 10 (GR10)

Location: 0 Friendship Chapel Road

Size: 2.64 acres

Tax PINs: 1850066925

Existing Land Use: Vacant

Applicable Officially Adopted Plans:

The request is generally Inconsistent with the relevant policies in the Comprehensive Plan, and Denial of the zoning map request is reasonable and in the public interest. See Attachment.

This report reflects the recommendation of the Planning Board, this the 21st day of August 2023.

Introduced by Planning Board member:

Michael Hickey

Seconded by Planning Board member:

Sheila Bishop

Attest:


Karin Kurobas, Planning Board Chair


Courtney Tanner, Planning Director

Community Plan Consistency Grid				
POLICIES FOR AFFORDABLE HOUSING		YES	NO	NA
AH-1	Implement Affordable Housing Plan			
POLICIES FOR RESIDENTIAL CHARACTER		YES	NO	NA
RC-1	Encourage single-family attached and multifamily development to incorporate varied building frontages and rooflines, front porches, front yards, and balconies to provide visual interest and complement the scale and character of surrounding single-family neighborhoods			
RC-2	Setbacks of infill development should match the existing context as much as possible as uniform setbacks can help foster a pedestrian-friendly environment			
RC-3	Promote higher density infill and redevelopment within older established neighborhoods to provide greater housing choices while matching the scale and character of existing properties			
RC-4	Promote higher density housing along key corridors and surrounding activity centers. This includes near areas designated in the Land Use Plan as Commercial Corridor; Neighborhood Commercial; Light Industrial; and Office, Civic, and Institutional			
RC-5	For larger scale planned subdivisions that provide a mix of housing types, work with private developers to locate lower density housing near existing single-family detached neighborhoods to create appropriate transitions and preserve the character of established neighborhoods			
RC-6	Consider requiring a minimum percentage of housing types in new neighborhood developments to increase housing diversity and affordability (e.g. at least 20% duplexes/townhomes)			
RC-7	Review and update the UDO to align with residential character recommendations within this Community Plan			
POLICIES FOR SENIOR HOUSING		YES	NO	NA
SH-1	Promote senior housing within a quarter mile of transit stops, Downtown, shopping areas, parks, and recreational facilities			
SH-2	Encourage smaller lot, single-story housing types for seniors that are ADA accessible			
SH-3	Encourage age-targeted cooperative housing types for community-oriented senior living, such as co-housing and cottage home courts			
SH-4	Promote the development of continuing care retirement communities (CCRC), or life plan communities, which offer distinct types of housing and care levels based on a senior's needs			
SH-5	Encourage developers of age-targeted housing to include amenities attractive to seniors, such as front porches, back patios, walking paths, and outdoor sports facilities, and activated gathering spaces			
POLICIES FOR COMMERCIAL DEVELOPMENT		YES	NO	NA
CD-1	Enhance established commercial areas by incentivizing redevelopment and/or renovation of existing businesses.			
CD-2	Support small, local businesses within commercial centers to support unique shopping options within Wake Forest			
CD-3	Establish architectural design standards for commercial building facades that promote quality design while allowing for flexibility that encourages creative design			
CD-4	Promote multi-story structures within Commercial Corridor and Neighborhood Commercial areas at appropriate scales that offer residential or office above ground-floor commercial			
CD-5	Encourage pedestrian-oriented shopping environments with sidewalks, attractive storefronts, and buildings facing each other to create a sense of enclosure			
CD-6	Encourage the incorporation of pedestrian/bicyclist/transit-oriented areas in large-scale shopping centers that provide outdoor seating and gathering areas, bicycle parking stations, and access to transit services			
CD-7	Promote cross-access and pedestrian pathways between adjacent parking lots and leading to buildings to promote well-connected, cohesive shopping areas			

Community Plan Consistency Grid				
CD-8	Encourage the consolidation of commercial driveways onto major streets to reduce traffic conflicts			
CD-9	Require “360 degree architecture” (high quality architecture on all sides of the building as opposed to just the front-facing façade), including well-designed or screened service areas			
CD-10	Encourage businesses to replace existing, non-conforming signage with attractive signage that meets Town standards			
CD-11	Promote outparcel development to improve the character along primary roadways and break up views of large parking lots			
CD-12	Review and update the UDO, including the US 1 Special Highway Overlay (SH1-O) and Dr Calvin Jones Highway Overlay (SH2-O) districts, to align with commercial development recommendations within this Community Plan			
CD-13	Support accessory commercial units (ACUs) that allow the ground floor of residential properties or an accessory structure facing the street to contain a commercial use beneficial to the surrounding neighborhood			
CD-14	Establish block standards for commercial areas to break up large tracts into more human scale pieces with streets or street-like features within the development			
POLICIES FOR MINORITY & WOMEN-OWNED BUSINESSES		YES	NO	NA
MWOB-1	Work with organizations, such as the Chamber and the Black Business Alliance, to expand diversity, equity, and inclusion programs that are supported with grassroots community engagement			
MWOB-2	Explore successful programs for supporting minority and women-owned businesses in surrounding communities to implement in Wake Forest			
MWOB-3	Explore regional, state, and federal grants available for minority and women businesses, such as grants from the National Institute of Economic Development and Carolina Community Impact			
MWOB-4	Support informational sessions and/or provide educational resources to employers on how they can establish equitable work environments and policies within their businesses			
POLICIES FOR SETBACKS		YES	NO	NA
SB-1	Incentivize businesses to situate new buildings at or near the property line to improve walkability, such as by requiring more landscaping if parking lots are located in front of buildings rather than to the rear/side			
SB-2	Promote consistency in setbacks within commercial and residential areas to form desirable continuity in the streetwall, or the facades of buildings facing the street			
SB-3	Encourage outparcel development with 360 architecture to “hold the corner” of commercial corridor development			
SB-4	Ensure adequate setbacks of industrial or other high intensity uses to reduce potential sound or visual impacts on adjacent lower intensity uses			
SB-5	Allow for flexibility in setbacks in Downtown where existing conditions prevent a consistent streetwall, while maintaining a close interface with the street (e.g., utility, landscaping, and/or topography challenges)			
POLICIES FOR PARKING LOTS		YES	NO	NA
PL-1	For existing front-loaded surface parking lots, encourage property owners to improve their character with perimeter and interior landscaping, and/or decorative walls and fencing			
PL-2	Require off-street parking to be located to the side or rear of the primary building			
PL-3	Encourage shared parking agreements where neighboring uses with different peak parking demand times can use the same parking lot, reducing the need for additional parking lots			
PL-4	Reevaluate minimum parking standards and consider implementing maximum parking standards to reduce excessive requirements			
PL-5	Monitor parking supply and strategically encourage structured or underground parking in higher density areas if needed, such as in Downtown, TOD, and activity center areas, to reduce the amount of land dedicated to surface parking			
PL-6	Consider offering incentives for structured parking, such as density bonuses, allowable lot coverage increases, and height limit increases.			

Community Plan Consistency Grid				
PL-7	Encourage the integration of structured parking into multifamily buildings to minimize surface parking lots			
PL-8	Encourage North Carolina Department of Environmental Quality's (NCDEQ) Stormwater Nitrogen and Phosphorus (SNAP) nutrient-reducing practices, such as permeable surfaces, that allow water infiltration in parking lots to improve stormwater drainage and water quality			
PL-9	Encourage the provision of pedestrian walkways in parking lots to enhance connectivity and safety to businesses			
POLICIES FOR SCREENING & BUFFERING		YES	NO	NA
SB-1	Ensure sufficient screening and buffering of industrial and commercial uses next to residential uses to minimize potential adverse impacts, such as in the Unicon Drive area			
SB-2	Encourage new development to preserve existing wooded areas along the perimeter of sites to provide natural buffering			
SB-3	Encourage screening of utility, loading, outdoor storage, and trash disposal areas that are visible from the right-of-way and adjacent development			
SB-4	Promote the use of setbacks for walls and fences that allow for plantings between the property line and the right-of-way and adjacent development			
POLICIES FOR COMMUNITY CHARACTER		YES	NO	NA
CC-1	Preserve vistas and view corridors that contribute to the economic and aesthetic value of Wake Forest, such as the church steeple at Southeastern Baptist Theological Seminary, S White Street in Downtown, and N Main Street in the Wake Forest Local Historic District			
CC-2	Curate public outdoor spaces for important monuments and artworks to showcase them as anchors and entry points to neighborhoods			
CC-3	Leverage historic structures, events, and people to create a sense of place through placemaking and branding			
CC-4	Ensure new development is contextual to the existing character of the area in terms of scale, massing, setback, fenestration, and design features (porches, storefronts, etc.)			
CC-5	Encourage developers to incorporate landscaping to beautify neighborhoods and commercial areas, such as landscaped medians and roundabouts.			
CC-6	Incorporate landscaping and gateway features into public rights-of-way, such as landscaped streetscapes, green infrastructure, and public promenades			
CC-7	Emphasize quality development along highly visible thoroughfares in the Town to reinforce its positive image			
CC-8	In accordance with the Land Use Plan, ensure incompatible, high intensity uses are directed away from low intensity residential areas			
CC-9	Continue to provide quality municipal services for the maintenance and upkeep of neighborhoods, such as street cleaning, snow removal, and trash disposal services			
CC-10	Work with NCDOT to identify areas for roadway enhancements			
CC-11	Refer to the Public Art Vision Plan for guidance when public art is being proposed in private development			
CC-12	Work with developers to improve the character of retaining walls, such as by incorporating public art or tiering the walls to reduce their visual impact			
POLICIES FOR UTILITY LINES		YES	NO	NA
UL-1	Create a master plan for burying utility lines with community involvement to identify priority areas for conversion			

Community Plan Consistency Grid				
UL-2	Ensure major Town entrances and gateway corridors and highly visible, pedestrian-oriented areas are prioritized for conversion			
UL-3	Consider trenching utilities as capital improvements are made in the right-of-way for all areas of the Town			
UL-4	Investigate partnering with private developers to install conduit for fiber and/or burying utility lines in priority conversion areas			
UL-5	Explore partnerships with private developers for boring and burying additional conduit along main roadways			
UL-6	Consider and install conduit with greenway project construction.			
POLICIES FOR HISTORIC PRESERVATION		YES	NO	NA
HP-1	Work with the Historic Preservation Commission (HPC) and the Planning Department to continue to implement the 2019 Historic Property Handbook and Design Standards and continue to preserve existing and new historic landmarks			
HP-2	Continue to enforce the Historic Preservation Ordinance for the Wake Forest Local Historic District and local historic landmarks			
HP-3	Promote State and Federal Tax Incentives for qualified rehabilitation projects for properties listed individually or as contributing historic properties in the National Register of Historic Places			
HP-4	Ensure development surrounding and within historic districts is sensitive to the historic context of the neighborhood			
HP-5	Encourage adaptive reuse, restoration, and repurposing of historic structures to preserve Wake Forest's history			
HP-6	Continue to enforce the Demolition of Historic Structures Ordinance for the protection of all historic properties in Wake Forest			
HP-7	Investigate the adoption of new local historic districts or character historic overlay districts to preserve Wake Forest's historic character			
POLICIES FOR COMMUNITY FACILITIES		YES	NO	NA
CF-1	Expand Town facilities concurrently with new growth			
CF-2	Annually review the Town's Work Management Plan, Staffing, and Budget section to reflect current needs and priorities			
CF-3	Work with the Wake Forest Parks, Recreation, and Cultural Resources Department to identify strategies to close gaps in park service areas, such as west of Capital Boulevard and the southern and eastern portion of Town			
CF-4	Work with the Wake Forest Parks, Recreation, and Cultural Resources Department to expand equity in the quality of public park facilities and programming			
CF-5	Explore green infrastructure options that also beautify spaces, like bioswales and planters			
CF-6	Continue to work with regional educational entities to provide support as they seek new facility locations or expansion with growth			
CF-7	Coordinate with regional educational entities to ensure increased equity in educational facilities across the community			
CF-8	Coordinate with the Police and Fire Departments to ensure response times are sufficient for all areas of town with growth			
CF-9	Consider emerging best practices for community safety, such as mental health crisis response teams			

Community Plan Consistency Grid				
CF-10	Promote and incorporate sustainable building practices into community facilities, setting a precedent for private developers to implement			
CF-11	Coordinate with regional healthcare providers to explore opportunities to locate a full service hospital or regional medical facilities in the Town			
CF-12	Evaluate existing streets and explore UDO updates to address traffic congestion, traffic speed, reduce collisions, and improve safety conditions for all modes of transportation			
CF-13	Regularly update the Town Pavement Management System program			
POLICIES FOR PUBLIC TRANSIT		YES	NO	NA
PT-1	Continue to work with transit partners to consider more frequent service and route network expansions to key locations to improve rider experience and attract more usage of mass transit			
PT-2	Coordinate with property owners, private developers, and transit partners to set aside land for transit stops at appropriate locations. The Town should obtain a transit easement for these locations and construct and maintain quality bus shelter infrastructure			
PT-3	Work with GoRaleigh and GoTriangle to construct smart bus shelters, or sustainable shelters that incorporate elements like interactive screens with live timetables, smart lighting, solar panels, and bike lock stations			
PT-4	Explore incorporating public art into bus shelters			
PT-5	Continue to evaluate and coordinate Park and Ride locations with transit partners			
PT-6	Explore best long term transit options such as fixed or microtransit			
POLICIES FOR CAPITAL BOULEVARD		YES	NO	NA
CB-1	Continue to work closely with NCDOT to implement the project and promote commercial growth in accordance with the Land Use Plan			
CB-2	Continue advocating for improvements along the corridor to assist in improving the quality of life for Wake Forest residents, businesses, and property owners			
POLICIES FOR STREET CONNECTIVITY		YES	NO	NA
SC-1	Promote short blocks of less than 600 linear feet between intersections of local roads to improve walkability			
SC-2	Avoid dead-ends, cul-de-sacs, and T-intersections in places where four-way intersections can be aligned			
SC-3	Study the appropriateness of traffic circles at four-way intersections to ease congestion and improve safety			
POLICIES FOR SIDEWALKS & MULTI-USE PATHS		YES	NO	NA
SP-1	Update the CTP to include an inventory of sidewalks in addition to multi-use paths and establish project priorities, private-public funding, and time frames for closing gaps in the network			
SP-2	Update the CTP to identify priority areas for high visibility crosswalks, bulb outs, refuge islands, rectangular rapid flashing beacons, and other pedestrian improvements			
SP-3	Work with Public Works to identify crosswalk ramps that are not ADA compliant and prioritize upgrades			
SP-4	In coordination with roadway improvements, upgrade aging sidewalks or install new sidewalks if none exist			

Community Plan Consistency Grid				
SP-5	Promote sidewalk, multi-use path, or trail connectivity between residential subdivisions and nonresidential development to improve pedestrian and bicycle connectivity			
SP-6	Continue to ensure all new residential development provides sidewalks on both sides of the street			
SP-7	Encourage multi-use paths to be provided along the main road in developments			
SP-8	Ensure multifamily and commercial developments include strong pedestrian networks within and between their sites			
POLICIES FOR BIKEWAYS, GREENWAYS & TRAILS		YES	NO	NA
BGT-1	Identify trail head locations as the greenway and trail network continues to expand			
BGT-2	Explore opportunities along greenways to add amenities (i.e. water fountains, seating /rest areas, pocket parks, public art, and fix it stations) and programming with the Parks, Recreation, and Cultural Resources Department or other organizations like StoryWalks			
BGT-3	Encourage development along greenways to incorporate greenway access into the site, particularly for uses attractive to trail users (i.e. restaurant, cafes, and bars)			
POLICIES FOR LOCAL FOOD SYSTEMS		YES	NO	NA
LFS-1	Continue to support the Northern Community Food Security Team and together explore other locations for community food hubs within the Town			
LFS-2	Partner with local food cooperatives and regional food networks, such as the Capital Area Food Network, to address food insecurity in the community			
LFS-3	Encourage regenerative practices, such as use of organic fertilizers, crop rotation, and crop variation for healthy soil			
LFS-4	Conduct a meal gap survey to better assess the immediate and long term needs in the community			
LFS-5	Evaluate the economic impact of local food systems in the community to encourage localized marketplaces for food producers			
LFS-6	Explore updates to the UDO that would promote urban agriculture and repurposing of vacant or underutilized lots for such uses			
POLICIES FOR CONSERVATION DESIGN		YES	NO	NA
CD-1	Encourage conservation design in the UDO's subdivision development regulations, particularly for areas within watershed protection areas			
CD-2	Explore incentives for promoting conservation design, such as density bonuses to allow for comparable number of housing units but greater preserved green space within the site			
CD-3	Encourage developers to enhance preserved green spaces as accessible amenities for residents, such as trails and outdoor seating			
POLICIES FOR GREEN SPACE PRESERVATION		YES	NO	NA
GSP-1	Prioritize higher density redevelopment and infill development within already developed areas to avoid premature development in long term growth areas and reduce greenfield development			
GSP-2	Work with private developers to preserve significant natural assets within sites, such as streams, steep slopes, unique geological formations, wetlands, and mature stands of trees, which can be incorporated as development amenities			

Community Plan Consistency Grid				
GSP-3	Continue to identify and strategically acquire environmentally sensitive land to preserve as dedicated conservation areas and publicly accessible open space			
GSP-4	Explore incentives to promote conservation design in future development, such as density bonuses, to promote clusters of taller structures that preserve natural areas of the site			
GSP-5	Explore strategies to further promote green space preservation within the updated UDO, such as increasing set aside requirements, and evaluate what is credited as open space			
GSP-6	Explore strategies to further protect wildlife and environmentally sensitive areas in the UDO			
POLICIES FOR TREE CANOPY		YES	NO	NA
TC-1	Continue to support the Town in administering the Urban Forestry Program and planting, preserving, and maintaining trees on public properties and rights-of-way			
TC-2	Explore updates to the UDO that could further promote tree preservation and replacement in new developments			
TC-3	Review existing incentives and consider additional incentives for private developers to promote tree preservation above what is required by the UDO			
TC-4	Explore ways to increase the number of trees required in parking lots during the update to the UDO, such as requiring an island every 20 parking spaces or decreasing the minimum distance a parking space can be from a tree			
TC-5	Ensure public and private tree plantings and xeriscaping are made up of native plant species that are adapted to local environmental conditions and require less irrigation			
TC-6	Coordinate efforts to influence State regulations related to the expansion of tree preservation standards			
POLICIES FOR SUSTAINABLE DEVELOPMENT		YES	NO	NA
SD-1	Encourage private developers to incorporate green building, LID, and green infrastructure practices in future developments			
SD-2	Incorporate green infrastructure into public streetscapes, prioritizing pedestrian-oriented areas like Downtown, TOD, and Neighborhood Commercial areas			
SD-3	Continue to incorporate sustainable design best practices into Town-owned infrastructure and community facilities, striving to incorporate LEED practices into future facilities			
SD-4	Use the Environmental Protection Agency's (EPA) "Revising Local Codes to Facilitate Low Impact Development" guide to help identify regulations within the UDO that discourage LID practices			
SD-5	Evaluate potential rainwater collection programs and composting programs			
SD-6	Explore an incentive program to encourage development to provide stormwater when lots are exempt from stormwater requirements			
SD-7	Update the Manual of Specifications, Standards and Design to reference green infrastructure design			
SD-8	Explore decommissioned rights-of-way as potential stormwater routes			
SD-9	Support the use of attractive, safe, and sustainable street furniture and infrastructure, such as solar streetlights, and LED traffic lights			
SD-10	Expand the electric vehicle (EV) charging network by requiring the installation of charging stations, or the infrastructure needed to accommodate future charging stations, in all new parking lots, especially parking lots of multifamily and large scale developments, and increasing supply of public charging stations			

Community Plan Consistency Grid				
SD-11	Promote adaptive reuse over redevelopment for structures that are structurally sound, feature desirable built form, and/or are historically significant. This includes creating an online inventory of buildings available for adaptive reuse			
SD-12	Investigate developing a solar energy ordinance and enrolling in the SolSmart program, a national designation program funded by the US Department of Energy charged with making solar power faster, easier, and more affordable			
SD-13	Explore ways to incentivize renewable energy and passive solar design in the Town's development standards. SolSmart's Solar Energy Toolkit can be used as resource for better promoting solar panels within the code			
SD-14	Continue partnership with Raleigh to encourage homeowners to incorporate practices for water conservation			
POLICIES FOR TOURISM		YES	NO	NA
T-1	Grow the Town's art community and reputation as a regional arts destination with a Downtown focus			
T-2	Explore the potential of constructing a recreational destination facility with a regional draw			
T-3	Develop annual Tourism Economic Impact Reports to help quantify progress made in Wake Forest's tourism sector and identify trends, issues, and opportunities that can help Town staff prioritize future investments			
T-4	Support the Wake Forest Area Chamber to create and market a local visitor's center as a public resource hub for the Town's attractions, events, and businesses for visitors			
T-5	Leverage Wake County's Room Occupancy Tax to build, finance, and create new establishments or run events related to tourism, allowing the Town to capitalize on its success in drawing hotel occupants			
T-6	Create a community-wide wayfinding plan to improve sense of place and signage that directs visitors and residents to Town destinations			
T-7	Continue to support Wake Forest Downtown Inc. (a Main Street America accredited program) in meeting the National Accreditation Standards of Performance as outlined by the National Main Street Center			
T-8	Continue to participate in the NC Main to Main Trail program, a network that connects the State's Main Street America communities, and leverage this designation in the Town's marketing strategy			
T-9	Investigate hiring consultants to provide a comprehensive evaluation of Town events and provide recommendations for improved programs			
T-10	Explore the creation of a social district, where customers can carry and consume food and drinks purchased from businesses outside in a designated zone			
POLICIES FOR GATEWAYS		YES	NO	NA
GW-1	Create a Gateway Plan to identify and prioritize sites for gateway features and establish design standards. Ensure the Plan works in synergy with the Town's Wayfinding Plan.			
GW-2	Improve roadway infrastructure along key gateway routes to enhance their character and multimodal connectivity.			
POLICIES FOR DOWNTOWN WAKE FOREST		YES	NO	NA
DWF-1	Evaluate existing zoning regulations around density in appropriate locations to balance Downtown's development potential with preserving its historic character			

Community Plan Consistency Grid				
DWF-2	Identify strategies to fill vacant buildings Downtown that promote an entrepreneurial and small-business culture			
DWF-3	Identify strategies to attract families and younger populations to Downtown with inviting public spaces, entertainment, and destinations for all ages			
DWF-4	Provide guidelines for how buildings should be orientated to support pedestrian-friendly environments			
DWF-5	Reassess parking demand and supply with consideration for a new parking garage(s) to minimize surface parking lots			
DWF-6	Identify strategies to create an “experience-based” Downtown retail environment with unique local businesses and a pedestrian-oriented environment			
DWF-7	Reassess strategies to improve gateways and wayfinding to and within Downtown to better direct people and create a distinct sense of place			
DWF-8	Identify opportunities for Downtown events and public gathering spaces to bring the community together, such as live outdoor events and festivals			

MEMORANDUM

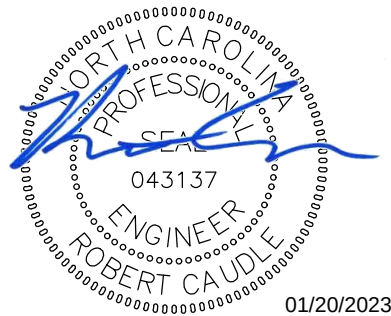
To: Town of Wake Forest
CC: Brendie Vega
From: Rob Caudle
Date: 01.20.2023
Project: 4Rivers
Subject: Parking Generation Estimates

WithersRavenel staff used a parking generation coefficient associated with the Institute of Transportation Engineers' 5th Edition of the Parking Generation Manual (2019). Staff used the coefficient for mini-warehouse (ITE Code 151), which is described as being typically referred to as "self-storage" facilities. With an initial site design of approximately 110,000 square feet, the following peak parking estimate was calculated:

Peak Parking Rate (0.10 spaces per 1,000 sq. ft.): 11.00 peak parking spaces

Respectfully,

Robert Caudle, PE



Tract A

Beginning at an existing iron pipe on the southern right of way of Friendship Chapel Road (70' Public R/W), said pipe having NC grid coordinates (NAD 83 – 2011) of N=806,986.79, E=2,150,306.42, thence from said beginning point with said right of way along a curve to the right having a radius of 3,965.00 feet, an arc length of 237.36 feet, and a chord bearing and distance of North 66°10'14" East 237.32 feet to an existing iron pipe, thence North 67°52'06" East 218.65 feet to a point, thence along a curve to the right having a radius of 50.00 feet, an arc length of 4.42 feet, and a chord bearing and distance of North 71°13'50" East 4.42 feet to an existing iron pipe on the western right of way of Jones Dairy Road (Variable Width Public R/W), thence leaving Friendship Chapel Road right of way and with Jones Dairy Road right of way South 27°50'03" East 154.18 feet to a point, thence along a curve to the right having a radius of 19,970.00 feet, an arc length of 49.51 feet, and a chord bearing and distance of South 27°45'48" East 49.51 feet to an existing iron pipe, thence leaving said right of way South 28°47'13" West 222.97 feet to an existing iron rod, thence South 03°47'10" West 162.80 feet to an existing iron rod, thence North 43°36'16" West 15.06 feet to a point, thence North 36°08'30" West 93.09 feet to a point, thence North 16°40'30" West 29.76 feet to a point, thence North 44°46'20" West 19.02 feet to a point, thence North 36°54'32" West 44.23 feet to a point, thence North 43°17'13" West 71.63 feet to a point, thence North 10°25'04" West 29.13 feet to a point, thence North 65°21'58" West 17.73 feet to a point, thence North 37°19'18" West 14.54 feet to a point, thence North 82°47'17" West 29.57 feet to a point, thence North 15°34'50" West 5.70 feet to a point, thence South 84°45'37" West 38.66 feet to a point, thence North 26°52'05" West 11.67 feet to a point, thence North 23°04'44" East 22.95 feet to a point, thence North 77°04'40" West 45.17 feet to a point, thence North 53°35'28" West 34.05 feet to a point, thence North 66°38'39" West 36.30 feet to a point, thence North 70°26'22" West 39.52 feet to the point and place of beginning, containing an area of 2.639 acres (114,944 Sq Ft) more or less.

Consistency Statement of the Wake Forest Board of Commissioners Pursuant to G.S. 160D-605 Addressing Action on Zoning Map Amendment RZ-23-01: 4Rivers - Wake Forest Self Storage Conditional District

The Wake Forest Board of Commissioners finds that RZ-23-01 is inconsistent with the Wake Forest Comprehensive Plan, and finds the rezoning request is not reasonable nor in the public interest since the proposed rezoning

1. Is inconsistent with the Wake Forest Community Plan's direction for Neighborhood Commercial areas, Activity Center areas, parking lots, screening and buffering, and community character; and
2. Does not comply with the Town's standards for parking and loading areas and pedestrian/bicycle connectivity.

SITE MASTER PLAN

4RIVERS - WAKE FOREST

SELF STORAGE

SITE MASTER PLAN

RZ-23-01

SURVEY BENCHMARK

BENCHMARK IS LOCAL TO SITE.
HORIZONTAL DATUM BASED ON NC GRID NAD 83 (2011).
VERTICAL DATUM BASED ON NAVD 88.

SITE DATA TABLE

DEVELOPMENT NAME	4RIVERS - WAKE FOREST
PROJECT NAME	SELF STORAGE
TOWN OF WAKE FOREST PROJECT NO.	RZ-23-01
SITE ADDRESS	300 JONES DAIRY ROAD, WAKE FOREST, NC
OWNER/DEVELOPER	4 RIVERS PROPERTY GROUP
WAKE COUNTY PARCEL NO. & PIN	0325088 & 1850066925
CURRENT ZONING	GR10
PROPOSED ZONING	HB-CD
GROWTH STRATEGY DESIGNATION	N/A
OVERLAY DISTRICT	DR. CALVIN JONES HIGHWAY (PARTIAL)
WATER SUPPLY WATERSHED PROTECTION OVERLAY	N/A (NOT LOCATED IN A DESIGNATED OVERLAY DISTRICT)
SPECIAL FLOOD HAZARD AREA DESIGNATION	ZONE AE (FEMA FIRM 3720185000K)
PARCEL ACREAGE	2.64 AC
RIGHT-OF-WAY ACREAGE	N/A
EXISTING USE	VACANT
PROPOSED USE	STORAGE - SELF SERVICE
EXISTING LOT IMPERVIOUS COVERAGE	± 0.00 AC (0%)
PROPOSED LOT IMPERVIOUS COVERAGE	± 0.96 AC (36%)
PROPOSED DENUDED AREA	± 1.71 AC
MINIMUM BUILDING SETBACKS:	
FRONT	30 FT
SIDE	30 FT
REAR	30 FT
MINIMUM LOT WIDTH:	
FRONT	150 FT
PROVIDED FRONTAGE	450 FT
BUILDING INFORMATION:	
PROPOSED NUMBER OF BUILDINGS	1
PROPOSED BUILDING SF	~110,500 SF (INCLUDING ~1,000 SF OF LOBBY)
MAXIMUM BUILDING HEIGHT	3 STORIES (PLUS BASEMENT LEVEL)
PROPOSED BUILDING HEIGHT	3 STORIES (PLUS BASEMENT LEVEL)
PARKING:	
REQUIRED PARKING	11 SPACES (PER PROPOSED ZONING CONDITION)
PROVIDED PARKING	12 SPACES (INCLUDING 1 ADA VAN SPACE)
BIKE PARKING:	
MINIMUM REQUIRED PARKING	2 SPACES (REFER TO SHEET C2.0)
PROPOSED PARKING	2 SPACES

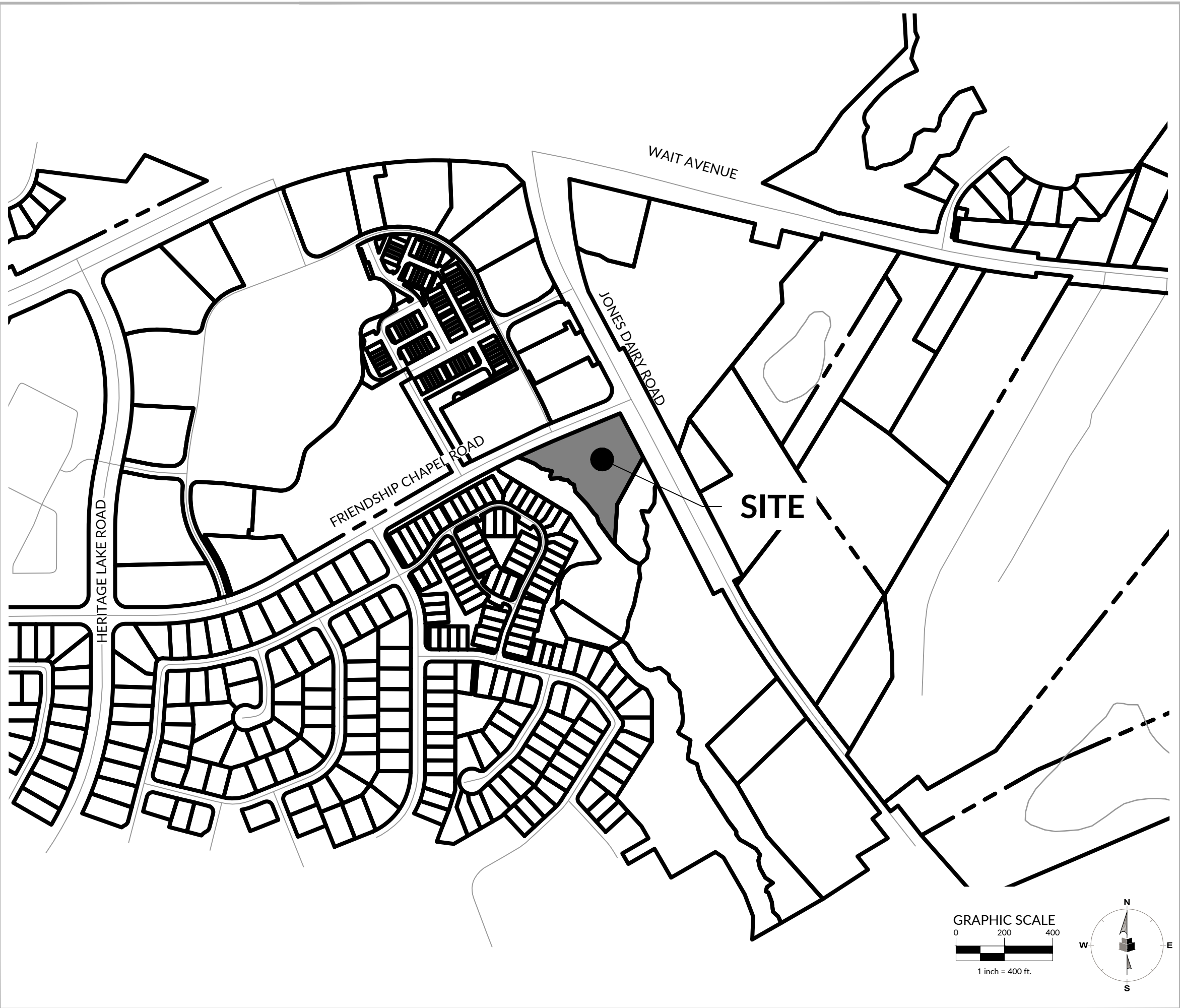
INFRASTRUCTURE DATA TABLE

PUBLIC R/W [LF]	NONE
PUBLIC WATER MAIN [LF]	0
PUBLIC SEWER MAIN [LF]	0
PUBLIC STORM DRAINAGE [LF]	NONE (ALL PROPOSED STORM IS PRIVATE)
PUBLIC GREENWAY [LF]	0

300 JONES DAIRY ROAD | WAKE FOREST, NC

CONDITIONAL DISTRICT REZONING:
1ST SUBMITTAL: JANUARY 20, 2023
2ND SUBMITTAL: MARCH 10, 2023
3RD SUBMITTAL: APRIL 21, 2023
4TH SUBMITTAL: JUNE 6, 2023
FINAL REZONING PLANS: JULY 24, 2023
UPDATED CONDITIONS: AUGUST 22, 2023

VICINITY MAP



INDEX OF SHEETS

NUMBER	TITLE
C0.0	COVER
C1.0	OVERALL EXISTING CONDITIONS PLAN
C1.1	OVERALL DEMOLITION PLAN
C2.0	OVERALL SITE PLAN
C3.0	OVERALL UTILITIES PLAN
C4.0	OVERALL GRADING AND DRAINAGE PLAN
L1.0	OVERALL LANDSCAPE PLAN
L2.0	LANDSCAPE DETAILS
SL1.0	OVERALL LIGHTING PLAN
TP1.0	TRUCK PATH - SINGLE UNIT TRUCK
TP2.0	TRUCK PATH - GARBAGE TRUCK
TP3.0	TRUCK PATH - FIRE TRUCK

SITE LEGEND

EXISTING		PROPOSED
	FIRE HYDRANT	
	POWER POLE	
	IRON PIPE SET	
	IRON PIPE FOUND	
	CALCULATED POINT	
	WATER VALVE	
	CATCH BASIN	
	SANITARY MANHOLE	
	BLOW OFF VALVE	
	PROJECT BOUNDARY LINE	
	ADJACENT PROPERTY LINE	
	RIGHT OF WAY	
	OVERHEAD ELECTRIC LINE	
	SANITARY SEWER LINE	
	STORM DRAINAGE LINE	
	WATER LINE	
	MAJOR CONTOUR LINE	
	MINOR CONTOUR LINE	

PROPOSED ZONING CONDITIONS

NOTE: REFER TO ZONING CONDITION MEMO, SUBMITTED UNDER A SEPARATE COVER, FOR MORE INFORMATION REGARDING ZONING CONDITIONS PROPOSED WITH THIS SITE MASTER PLAN.

- THE CORRESPONDING SITE MASTER PLAN IS A CONDITION OF THE REZONING. AMENDMENTS OF THE SITE MASTER PLAN SHALL REQUIRE A REZONING AMENDMENT UNLESS THE ADMINISTRATOR FINDS THE MODIFICATION TO BE MINOR AND IN KEEPING WITH THE SPIRIT AND INTENT OF THE ADOPTED SITE MASTER PLAN.
- THE LANDOWNER SHALL COMPLETE ALL IMPROVEMENTS TO THE ADJACENT ROADWAYS AND ROADWAY FRONTAGES AS SHOWN ON THE CORRESPONDING SITE MASTER PLAN AND AS IDENTIFIED IN THE TOWN OF WAKE FOREST COMPREHENSIVE TRANSPORTATION PLAN. SUCH IMPROVEMENTS SHALL BE COMPLETED FROM THE CENTER OF THE ROADWAY TO THE SITE PROPERTY LINE, OR, WHERE APPROVED BY THE TOWN'S PLANNING AND ENGINEERING DEPARTMENTS, THE LANDOWNER MAY SUBMIT A FEE TO THE TOWN IN LIEU OF COMPLETING ALL OR PART OF THE IMPROVEMENTS.
- THE OFF-STREET PARKING REQUIREMENTS IN UDO SECTION 9.4.B SHALL BE MODIFIED TO ALLOW A MINIMUM OF ELEVEN (11) OFF-STREET PARKING SPACES.
- REQUIRED OFF-STREET LOADING SPACES ARE EXEMPT FROM THE STANDARDS OF UDO SECTIONS 9.4.5.C(1), (2), (3), AND (5).
- BUILDING ENTRANCES ADJACENT TO OFF-STREET LOADING SPACES SHALL PROVIDE ACCESS TO THE BUILDING THROUGH SLIDING GLASS DOORS.
- THE DEVELOPMENT SHALL BE EXEMPT FROM THE PEDESTRIAN/BICYCLE ACCESSWAY REQUIREMENTS IN UDO SECTION 6.5.3.A.
- IN ADDITION TO THE REQUIREMENTS OF UDO 5.6.2.C, THE FACADE COLORS SHALL INCLUDE A MINIMUM OF TWO COMPATIBLE COLORS. ALL COLORS SHALL ALSO COMPLEMENT THE BUILDINGS LOCATED ON PIN 1840972490 (GATEWAY COMMONS).
- THE FACADE OF BUILDING CORNERS SHALL INCLUDE ENHANCED ARCHITECTURAL FEATURES TO CREATE A VISUAL INTEREST, AND EACH BUILDING CORNER VISIBLE FROM PUBLIC STREETS SHALL MAINTAIN A RELATION TO EACH OTHER, BUT ARE NOT REQUIRED TO BE IDENTICAL. BUILDING CORNERS SHALL RELATE TO EACH OTHER WITH ENHANCED GLASS ELEMENTS AND ACCENT COLOR.

RECOMMENDATION FOR APPROVAL
BY THE WAKE FOREST
PLANNING BOARD
DATE _____

APPROVAL BY THE
WAKE FOREST BOARD
OF COMMISSIONERS
DATE _____

CONTACT LIST:

LANDSCAPE ARCHITECT
Daniel Whatley, PLA
WithersRavenel
137 S Wilmington Street, Suite 200
Raleigh, NC 27601
919-535-5200
dwhatley@withersravenel.com

CIVIL ENGINEER
Ricardo Coconcilli, PE
WithersRavenel
115 MacKenan Drive
Cary, NC 27511
919-469-3340
rcoconcilli@withersravenel.com

DEVELOPER
Hunter Dawkins
4 Rivers Property Group
1200 E Morehead St, Suite 280,
Charlotte, NC 28204
704-281-8959
jake@prestondew.com

ARCHITECT
Alvah Davis
McMillan Pazdan Smith Architecture
115 MacKenan Drive
Cary, NC 27511
864-398-5268
adavis@mcmillanpazdansmith.com



PREPARED BY:

WithersRavenel
115 MacKenan Drive | Cary, NC 27511
License #: F-1479 | t: 919.469.3340 | www.withersravenel.com



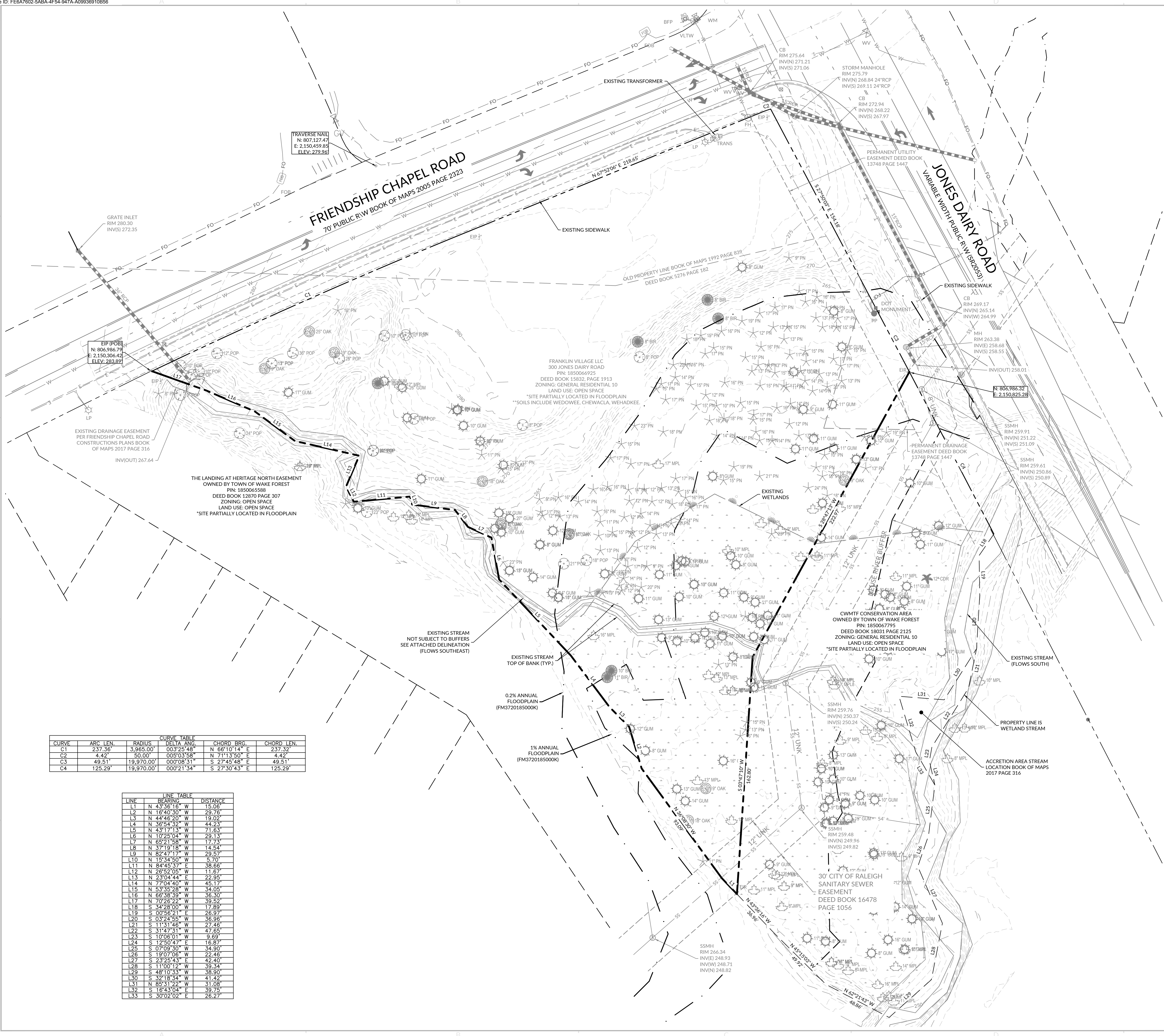
DEVELOPER:

4RIVERS PROPERTY GROUP

1200 EAST MOREHEAD STREET, SUITE 280
CHARLOTTE, NC 28204
PHONE #: 704-281-8959
ATTENTION: HUNTER DAWKINS



SITE MASTER PLAN
4RIVERS - WAKE FOREST
SELF STORAGE
SITE MASTER PLAN
WR PROJECT NO.09221052
TOWN OF WAKE FOREST
MUNI PRO NO-RZ-23-01
01/20/2023



CURVE TABLE					
CURVE	ARC LEN.	RADIUS	DELTA ANG.	CHORD BRG.	CHORD LEN.
C1	237.36	3,965.00'	003°25'48"	N 66°10'14" E	237.32
C2	4.42'	50.00'	005°03'58"	N 71°13'50" E	4.42'
C3	49.51'	19,970.00'	000°08'31"	S 27°45'48" E	49.51'
C4	125.29'	19,970.00'	000°21'34"	S 27°30'43" E	125.29'

LINE TABLE			
LINE	BEARING	W	DISTANCE
L1	N 43°36'16"	W	15.56'
L2	N 16°40'30"	W	28.76'
L3	N 44°46'20"	W	19.02'
L4	N 36°54'32"	W	44.23'
L5	N 43°17'13"	W	71.63'
L6	N 10°25'04"	W	29.13'
L7	N 65°21'58"	W	17.73'
L8	N 37°19'18"	W	14.54'
L9	N 82°47'17"	W	29.57'
L10	N 15°34'50"	W	5.70'
L11	N 84°45'37"	E	38.66'
L12	N 26°52'05"	W	11.67'
L13	N 23°04'44"	E	22.95'
L14	N 77°04'40"	W	45.17'
L15	N 63°35'28"	W	34.05'
L16	N 66°38'59"	W	36.30'
L17	N 70°26'22"	W	39.52'
L18	S 34°28'00"	W	17.89'
L19	S 00°56'21"	E	26.87'
L20	S 03°24'55"	W	36.96'
L21	S 11°31'46"	W	27.46'
L22	S 31°47'31"	W	47.65'
L23	S 10°06'01"	W	9.69'
L24	S 12°50'47"	E	16.87'
L25	S 07°09'30"	W	34.90'
L26	S 19°07'06"	W	22.46'
L27	S 23°25'43"	E	42.40'
L28	S 11°00'12"	W	39.34'
L29	S 48°10'33"	W	38.90'
L30	S 32°18'34"	W	41.42'
L31	N 85°31'22"	E	31.08'
L32	S 16°43'04"	E	39.75'
L33	S 30°02'02"	E	26.27'

- SURVEY NOTES
1. NO NGS MONUMENT FOUND WITHIN 2,000 FEET OF THE SITE

2. THE FOLLOWING INFORMATION WAS USED TO OBTAIN NC GRID NAD 83 (2011), NAVD 88 STATE PLANE COORDINATES (SPO) FOR THIS PROJECT:

2.1. CLASS OF SURVEY: URBAN LAND SURVEYS (CLASS A)

2.2. POSITIONAL ACCURACY: 0.03" (H), 0.07" (V)

2.3. GPS FIELD PROCEDURE: VRS

2.4. DATE OF SURVEY: 09/14/2022

2.5. DATUM/EPOCH: NAD 83 (2011), EPOCH 2010.00

2.6. PUBLISHED DATE/FIXED CONTROL USED: VRS, NCRD

2.7. GEIOD MODEL: GEIOD 16

2.8. COMBINED GRID FACTOR: 0.999941829

2.9. UNITS: U.S. SURVEY FEET

2.10. GRID/GROUND POINT: Y(N) 806,986.794 X(E) 2,150,306.42

3. ALL DISTANCES ARE HORIZONTAL GROUND DISTANCES IN U.S. SURVEY FEET UNLESS OTHERWISE NOTED.

4. ALL AREAS DERIVED BY THE COORDINATE COMPUTATION METHOD.

5. PROPERTY SUBJECT TO ALL EASEMENTS AND RESTRICTIONS OF RECORD. THIS PLAT IS A CORRECT REPRESENTATION OF THE LAND PLATTED AND HAS BEEN PREPARED IN CONFORMITY WITH NORTH CAROLINA STANDARDS, G.S. 47-30, AND REQUIREMENTS OF LAW, BUT A NORTH CAROLINA LICENSED ATTORNEY-AT-LAW SHOULD BE CONSULTED REGARDING CORRECT OWNERSHIP, WIDTH, AND LOCATION OF EASEMENTS AND OTHER TITLE QUESTIONS REVEALED BY TITLE EXAMINATION.

6. LINES NOT SURVEYED ARE SHOWN AS BROKEN LINES FROM INFORMATION REFERENCED ON THE FACE OF THIS PLAT.

7. SUBJECT PROPERTY IS LOCATED WITHIN A FLOOD HAZARD AREA ACCORDING TO FLOOD INSURANCE RATE MAP 3720184000K DATED JULY 19, 2022.

8. LOCATION OF UTILITIES, WHETHER PUBLIC OR PRIVATE, IS BASED UPON FIELD LOCATION OF VISIBLE APPURTENANCES ONLY. IT IS THE CONTRACTOR'S RESPONSIBILITY TO VERIFY LOCATION PRIOR TO COMMENCEMENT OF ANY CONSTRUCTION. WITHERSRAVENEL CANNOT ASSUME RESPONSIBILITY FOR MISIDENTIFICATION OR OMISSION OF UNDERGROUND UTILITIES.

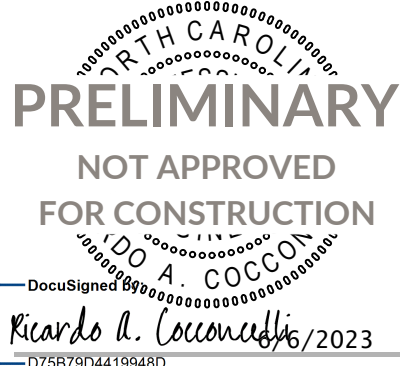
9. PER NCGS SECTION 70-29 DISCOVERY OF REMAINS AND NOTIFICATIONS OF AUTHORITIES, AND INADVERTENT DISCOVERY OF MARKER OR UNMARKED GRAVES OR HUMAN REMAINS REQUIRES THAT WORK IMMEDIATELY STOP AND THE PROCESS OUTLINED IN NCGS SECTION 70-29 BE FOLLOWED.



SITE MASTER PLAN

4RIVERS - WAKE FOREST

SELF STORAGE



- INITIAL PLAN DATE: 01/20/2023
- REVISIONS:

1 - 03/10/2023
TOWN OF WAKE FOREST COMMENTS

2 - 04/21/2023
TOWN OF WAKE FOREST COMMENTS

3 - 06/06/2023
TOWN OF WAKE FOREST COMMENTS

RECOMMENDATION FOR APPROVAL

BY THE WAKE FOREST

PLANNING BOARD

DATE

APPROVAL BY THE

WAKE FOREST BOARD

OF COMMISSIONERS

DATE

TOWNE PROJ. NUMBER

RZ-23-01

WR JOB NUMBER

09221052

DRN-WR

DGN-WR

CKD-WR

OVERALL EXISTING

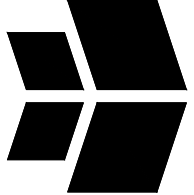
CONDITIONS PLAN

C1.0

WithersRavenel

115 McKean Drive | Cary, NC 27511

License #: F-1479 | t: 919.469.3340 | www.withersravenel.com



our people

•

your success

LINE	LINE TABLE	DISTANCE
L1	N 43°36'16" E	13.06
L2	N 16°40'50" W	29.76
L3	N 10°00'00" E	13.07
L4	N 36°54'30" E	44.23
L5	N 43°17'13" W	71.63
L6	N 1025°04" W	25.13
L7	N 10°00'00" E	13.07
L8	N 37°19'18" W	14.54
L9	N 82°47'17" E	29.57
L10	N 10°00'00" E	13.07
L11	N 84°45'37" E	38.66
L12	N 26°52'05" W	11.67
L13	N 3°33'00" E	22.53
L14	N 77°04'40" W	45.17
L15	N 53°35'28" W	34.05
L16	N 10°00'00" E	13.07
L17	N 70°26'22" W	39.52
L18	S 34°28'00" W	17.89
L19	S 24°00'00" W	20.77
L20	S 02°24'55" W	36.96
L21	S 11°31'46" W	27.46
L22	S 10°00'00" E	47.65
L23	S 10°00'00" E	8.68
L24	S 12°50'47" E	16.87
L25	S 07°09'30" W	34.90
L26	S 10°00'00" E	13.07
L27	S 23°25'43" E	42.46
L28	S 11°00'12" W	39.34
L29	S 10°00'00" E	38.00
L30	S 32°18'34" W	41.42
L31	S 35°51'22" W	31.08
L32	S 10°00'00" E	13.07
L33	S 80°02'02" E	26.27

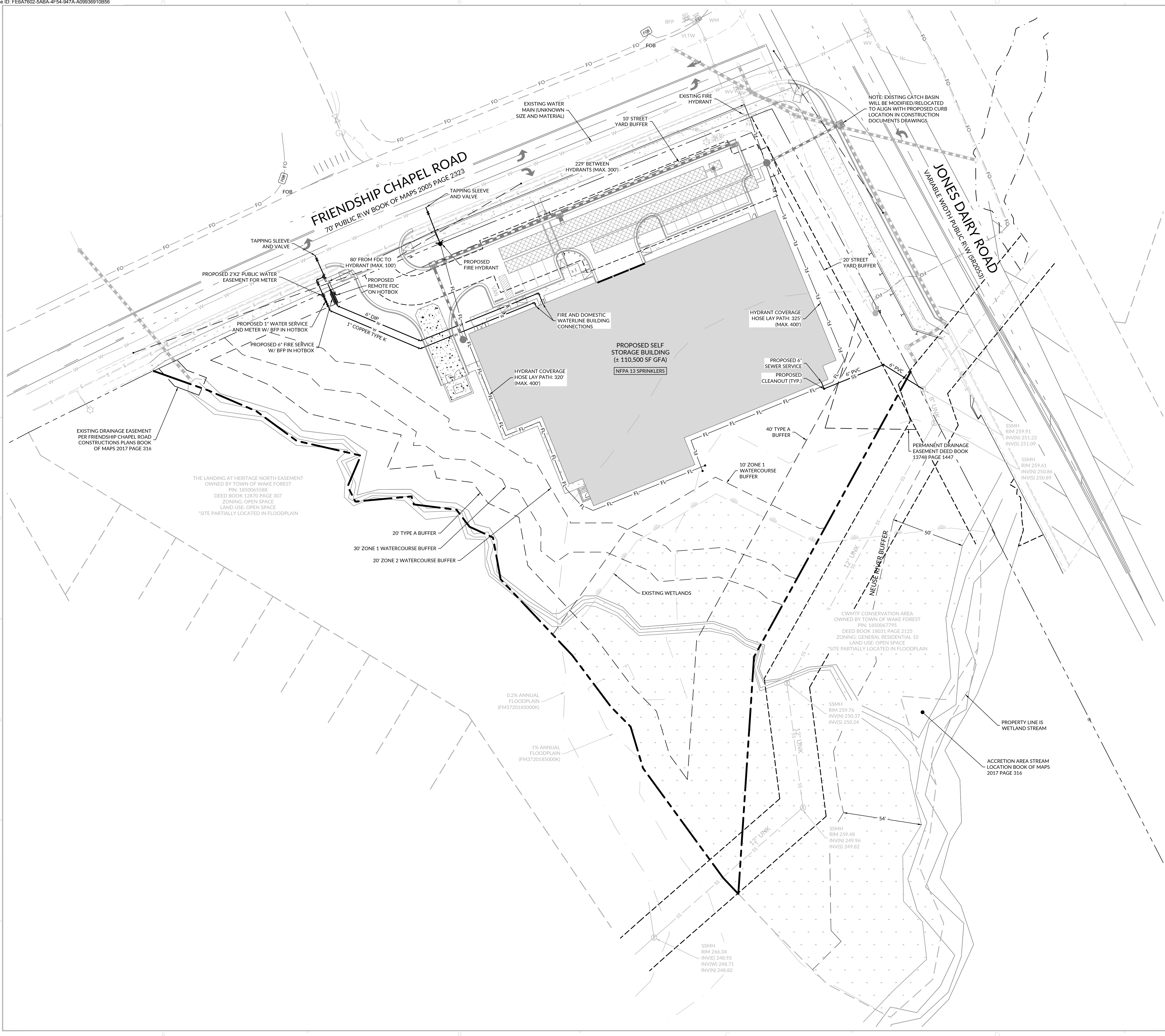
NOTE: ALL TREES SHOWN IN THE ABOVE TABLE ARE CANOPY TREES. NO 8" UNDERSTORY TREES ARE PROPOSED TO BE REMOVED WITH THIS PROJECT. PER UDO SECTION 8.4.3.A.1, ONLY CANOPY TREES WITH A 20" DBH OR GREATER ARE CONSIDERED SPECIMEN TREES. TREES MARKED WITH AN ASTERISK ARE CONSIDERED SPECIMEN TREES THAT ARE TO BE REMOVED WITH THIS PLAN. REFER TO SHEET L2.0 FOR INFORMATION REGARDING REPLACEMENT OF SPECIMEN TREES.

DATE _____

C1.1

80 EST. 1983

81 EST. 1983



- COR APPENDIX D STANDARD UTILITY NOTES**
- ALL STANDARD MATERIALS & CONSTRUCTION METHODS SHALL BE IN ACCORDANCE WITH CITY OF RALEIGH DESIGN STANDARD, DETAILS, & SPECIFICATIONS (REFERENCE CORPUS HANDBOOK, CURRENT EDITION).
 - UTILITY SEPARATION REQUIREMENTS:
 - A DISTANCE OF 10' SHALL BE MAINTAINED BETWEEN SANITARY SEWER & ANY PRIVATE OR PUBLIC WATER SUPPLY SOURCE SUCH AS AN IMPOUNDED RESERVOIR USED AS A SOURCE OF DRINKING WATER. IF ADEQUATE LATERAL SEPARATION CANNOT BE ACHIEVED, FERROUS SANITARY SEWER PIPE SHALL BE SPECIFIED & INSTALLED TO WATERLINE SPECIFICATIONS. HOWEVER, THE MINIMUM SEPARATION SHALL NOT BE LESS THAN 25' FROM A PRIVATE WELL OR 50' FROM A PUBLIC WELL.
 - WHEN INSTALLING WATER &/OR SEWER MAINS, THE HORIZONTAL SEPARATION BETWEEN UTILITIES SHALL BE 10' IF THIS SEPARATION CANNOT BE MAINTAINED DUE TO EXISTING CONDITIONS. THE VARIATION ALLOWED IS THE WATER MAIN IN A SEPARATE TRENCH WITH THE ELEVATION OF THE WATER MAIN AT LEAST 18" ABOVE THE TOP OF THE SEWER & MUST BE APPROVED BY THE PUBLIC UTILITIES DIRECTOR. ALL DISTANCES ARE MEASURED FROM OUTSIDE DIAMETER TO OUTSIDE DIAMETER.
 - WHERE IT IS IMPOSSIBLE TO OBTAIN PROPER SEPARATION, OR ANYTIME A SANITARY SEWER PASSES OVER A WATERMAIN, DIP MATERIALS OR STEEL ENCASEMENT EXTENDED 10' ON EACH SIDE OF CROSSING MUST BE SPECIFIED & INSTALLED TO WATERLINE SPECIFICATIONS.
 - 5.0' MINIMUM HORIZONTAL SEPARATION IS REQUIRED BETWEEN ALL SANITARY SEWER & STORM SEWER FACILITIES, UNLESS DIP MATERIAL IS SPECIFIED FOR SANITARY SEWER.
 - MAINTAIN 18" MIN. VERTICAL SEPARATION AT ALL WATERMAIN & RCP STORM DRAIN CROSSINGS. MAINTAIN 18" MIN. VERTICAL SEPARATION AT ALL SANITARY SEWER & RCP STORM DRAIN CROSSINGS WHERE ADEQUATE SEPARATIONS CANNOT BE ACHIEVED. SPECIFY DIP MATERIALS & A CONCRETE CRADLE HAVING 6" MIN. CLEARANCE (PER CORPUS DETAILS W-41.6.5-49).
 - ALL OTHER UNDERGROUND UTILITIES SHALL CROSS WATER & SEWER FACILITIES WITH 18" MIN. VERTICAL SEPARATION REQUIRED.
 - ANY NECESSARY FIELD REVISIONS ARE SUBJECT TO REVIEW & APPROVAL OF AN AMENDED PLAN &/OR PROFILE BY THE CITY OF RALEIGH PUBLIC UTILITIES DEPARTMENT PRIOR TO CONSTRUCTION.
 - DEVELOPER SHALL PROVIDE 30 DAYS ADVANCE WRITTEN NOTICE TO OWNER FOR ANY WORK REQUIRED WITHIN AN EXISTING CITY OF RALEIGH UTILITY EASEMENT TRAVERSING PRIVATE PROPERTY.
 - CONTRACTOR SHALL MAINTAIN CONTINUOUS WATER & SEWER SERVICE TO EXISTING RESIDENCES & BUSINESSES THROUGHOUT CONSTRUCTION OF PROJECT. ANY NECESSARY SERVICE INTERRUPTIONS SHALL BE PRECEDED BY A 24 HOUR ADVANCE NOTICE TO THE CITY OF RALEIGH PUBLIC UTILITIES DEPARTMENT.
 - 3.0' MINIMUM COVER IS REQUIRED ON ALL WATER MAINS & SEWER FORCE MAINS. 4.0' MINIMUM COVER IS REQUIRED ON ALL REUSE MAINS.
 - IT IS THE DEVELOPER'S RESPONSIBILITY TO ABANDON OR REMOVE EXISTING WATER & SEWER SERVICES NOT BEING USED IN REDEVELOPMENT OF A SITE UNLESS OTHERWISE DIRECTED BY THE CITY OF RALEIGH PUBLIC UTILITIES DEPARTMENT. THIS INCLUDES ABANDONING TAP AT MAIN & REMOVAL OF SERVICE FROM ROW OR EASEMENT PER CORPUS HANDBOOK PROCEDURE.
 - INSTALL 1" COPPER WATER SERVICE WITH METERS LOCATED AT ROW OR WITHIN A 2'X2' WATERLINE EASEMENT IMMEDIATELY ADJACENT. NOTE: IT IS THE APPLICANT'S RESPONSIBILITY TO PROPERLY SIZE THE WATER SERVICE FOR EACH CONNECTION TO PROVIDE ADEQUATE FLOW & PRESSURE.
 - INSTALL 6" PVC SEWER SERVICES @ 1.0% MINIMUM GRADE WITH CLEANOUTS LOCATED AT ROW OR EASEMENT LINE & SPACED EVERY 75 LINEAL FEET MAXIMUM.
 - PRESSURE REDUCING VALVES ARE REQUIRED ON ALL WATER SERVICES EXCEEDING 80 PSI. BACKWATER VALVES ARE REQUIRED ON ALL SANITARY SEWER SERVICES HAVING BUILDING DRAINS LOWER THAN 1.0' ABOVE THE NEXT UPSTREAM MANHOLE.
 - ALL ENVIRONMENTAL PERMITS APPLICABLE TO THE PROJECT MUST BE OBTAINED FROM NCDWQ, USACE &/OR FEMA FOR ANY RIPARIAN BUFFER, WETLAND &/OR FLOODPLAIN IMPACTS (RESPECTIVELY) PRIOR TO CONSTRUCTION.
 - NCDOT / RAILROAD ENCROACHMENT AGREEMENTS ARE REQUIRED FOR ANY UTILITY WORK (INCLUDING MAIN EXTENSIONS & SERVICE TAPS) WITHIN STATE OR RAILROAD ROW PRIOR TO CONSTRUCTION.
 - GREASE INTERCEPTOR / OIL WATER SEPARATOR SIZING CALCULATIONS & INSTALLATION SPECIFICATIONS SHALL BE APPROVED BY THE CORPUS FOG PROGRAM COORDINATOR PRIOR TO ISSUANCE OF A BUILDING PERMIT. CONTACT STEPHEN CALVERLEY AT (919) 996-2334 OR STEPHEN.CALVERLEY@RALEIGHNC.GOV FOR MORE INFORMATION.
 - CROSS-CONNECTION CONTROL PROTECTION DEVICES ARE REQUIRED BASED ON DEGREE OF HEALTH HAZARD INVOLVED AS LISTED IN APPENDIX-B OF THE RULES GOVERNING PUBLIC WATER SYSTEMS IN NORTH CAROLINA. THESE GUIDELINES ARE THE MINIMUM REQUIREMENTS. THE DEVICES SHALL MEET AMERICAN SOCIETY OF SANITARY ENGINEERING (ASSE) STANDARDS OR BE ON THE UNIVERSITY OF SOUTHERN CALIFORNIA APPROVAL LIST. THE DEVICES SHALL BE INSTALLED AND TESTED (BOTH INITIAL AND PERIODIC TESTING THEREAFTER) IN ACCORDANCE WITH THE MANUFACTURER'S RECOMMENDATIONS OR THE LOCAL CROSS-CONNECTION CONTROL PROGRAM, WHICHEVER IS MORE STRINGENT. A CERTIFICATE OF COMPLIANCE SHALL ALSO BE OBTAINED FOR EACH DEVICE PRIOR TO ISSUANCE OF A BUILDING PERMIT. CONTACT JOANIE HARTLEY AT (919) 996-5923 OR JOANIE.HARTLEY@RALEIGHNC.GOV FOR MORE INFORMATION.

RECOMMENDATION FOR APPROVAL BY THE WAKE FOREST PLANNING BOARD	DATE _____
APPROVAL BY THE WAKE FOREST BOARD OF COMMISSIONERS	DATE _____

WithersRavenel
115 McKean Drive | Cary, NC 27511
License #: F-1479 | t: 919.469.3340 | www.withersravenel.com

4 RIVERS
PROJECT BY WITHERSRAVENEL

1200 EAST MOREHEAD STREET,
SUITE 200
CHARLOTTE, NC 28204

SITE MASTER PLAN
**4RIVERS - WAKE FOREST
SELF STORAGE**

PRELIMINARY
NOT APPROVED
FOR CONSTRUCTION
DO NOT CONSTRUCTION
DocuSign
Rickie A. Cocconelli 6/6/2023
01/28/2024 19:48:00 ...

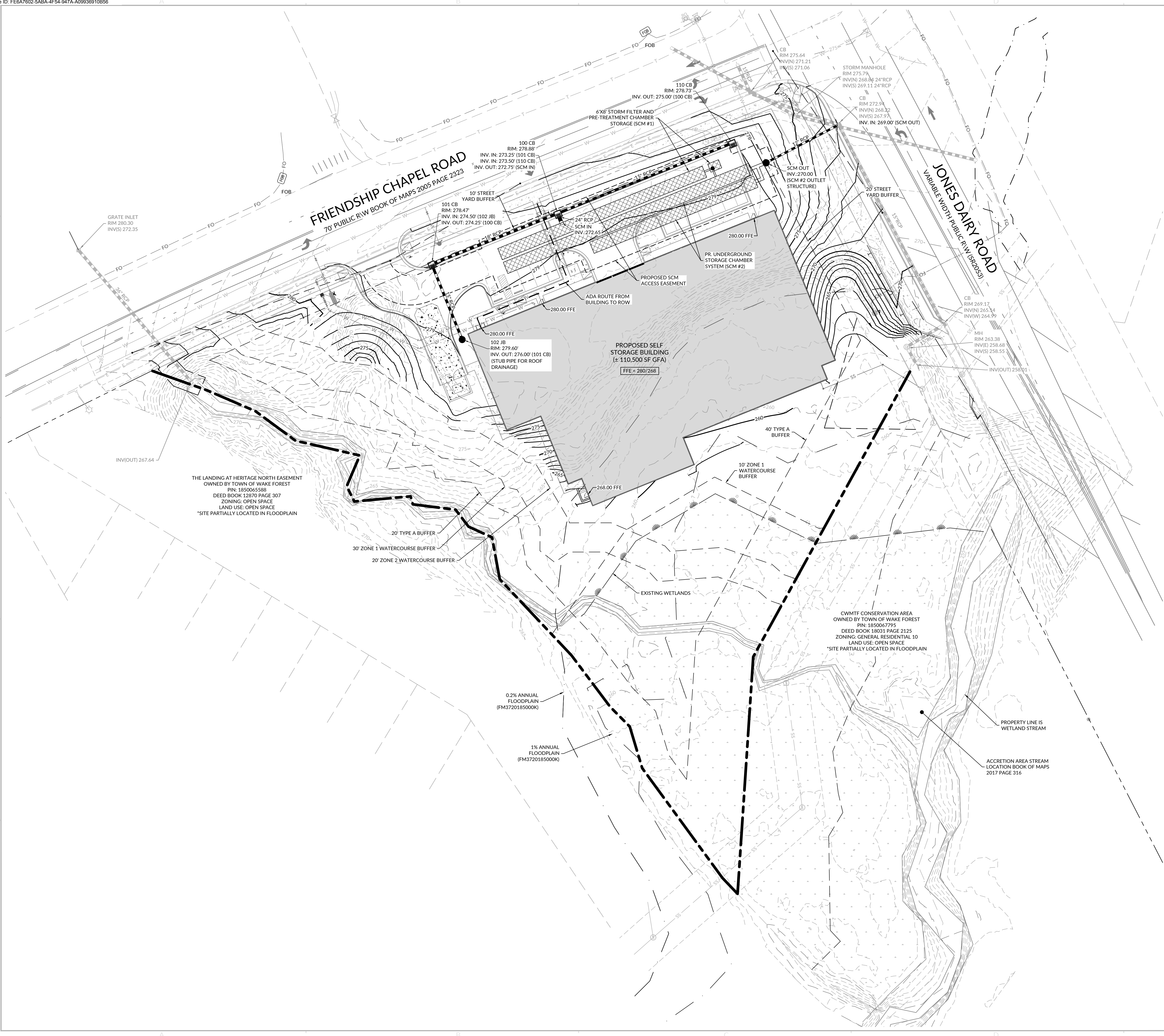
SCALE: 1 inch = 30 ft.

INITIAL PLAN DATE: 01/20/2023
REVISIONS:
1 - 03/10/2023
TOWN OF WAKE FOREST COMMENTS
2 - 04/21/2023
TOWN OF WAKE FOREST COMMENTS
3 - 06/06/2023
TOWN OF WAKE FOREST COMMENTS

TOWNE PROJ. NUMBER: BZ-23-01
WR JOB NUMBER: 09221052
DRN: WR DGN: WR CKD: WR

**OVERALL UTILITIES
PLAN**

C3.0



GRADING AND DRAINAGE LEGEND	
SYMBOL	DESCRIPTION
	EXISTING MAJOR CONTOUR
	EXISTING MINOR CONTOUR
	PROPOSED MAJOR CONTOUR
	PROPOSED MINOR CONTOUR

- GRADING AND DRAINAGE NOTES**
1. STORM DRAINAGE AND SCM DESIGN SHOWN HEREIN IS PRELIMINARY AND IS SUBJECT TO CHANGE PENDING FURTHER DESIGN.

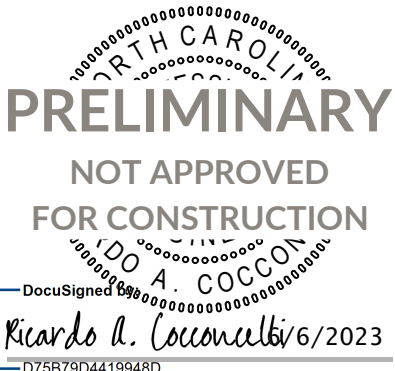
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SITE MASTER PLAN
**4RIVERS - WAKE FOREST
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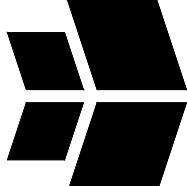
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DRN: WR DGN: WR CKD: WR

**OVERALL GRADING
AND DRAINAGE
PLAN**

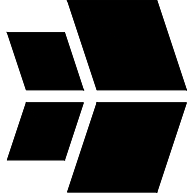
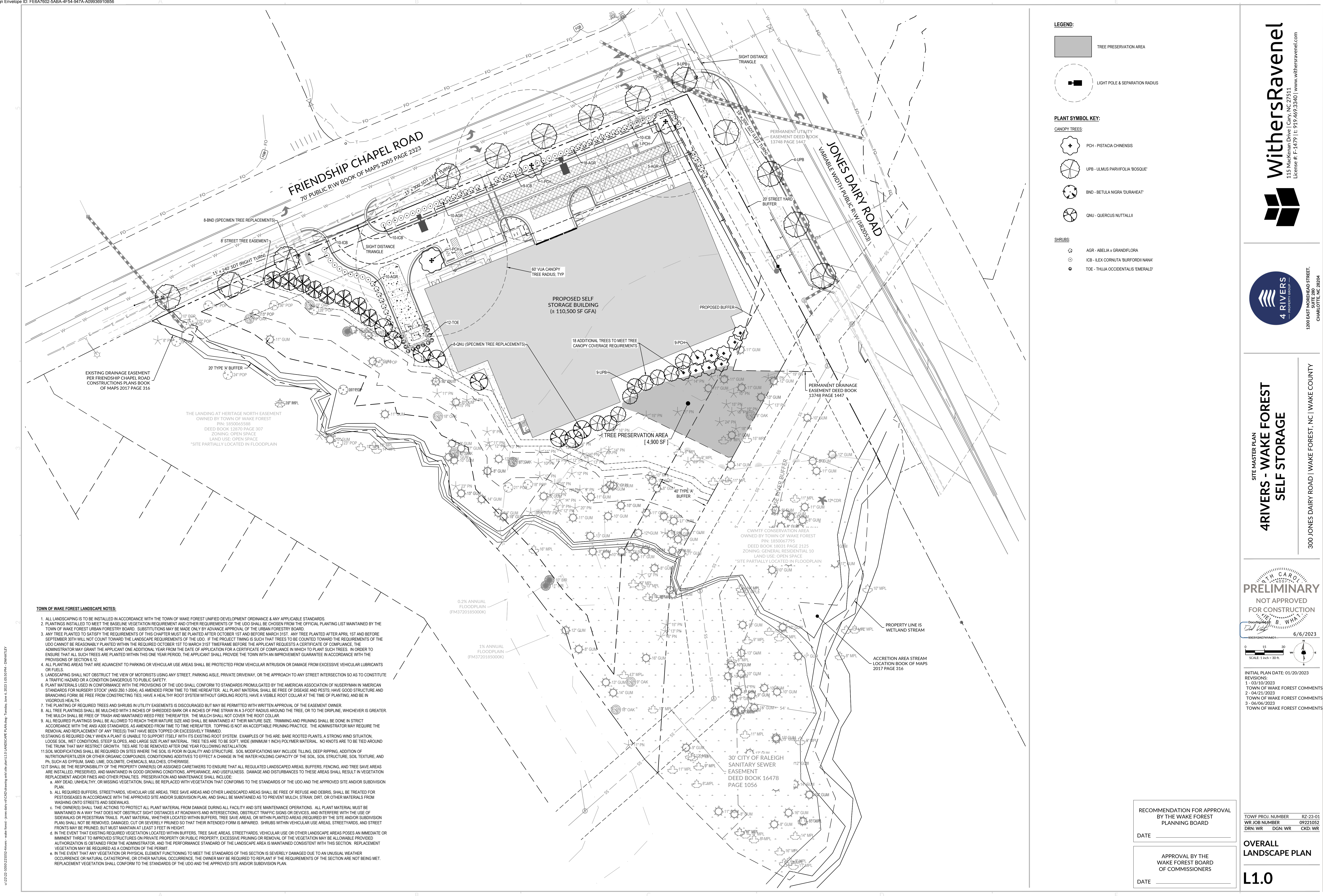
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1200 EAST MOREHEAD STREET,
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CHARLOTTE, NC 28204



WithersRavenel
115 Mackenran Drive | Cary, NC 27511
License #: F-1479 | t: 919.469.3340 | www.withersravenel.com



1200 EAST WOREHEAD STREET,
SUITE 200
CHARLOTTE, NC 28204

SITE MASTER PLAN
**4RIVERS - WAKE FOREST
SELF STORAGE**

300 JONES DAIRY ROAD | WAKE FOREST, NC | WAKE COUNTY

PRELIMINARY
NOT APPROVED
FOR CONSTRUCTION

6/6/2023
SCALE: 1 inch = 30 ft

INITIAL PLAN DATE: 01/20/2023
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OVERALL
LANDSCAPE PLAN

L1.0

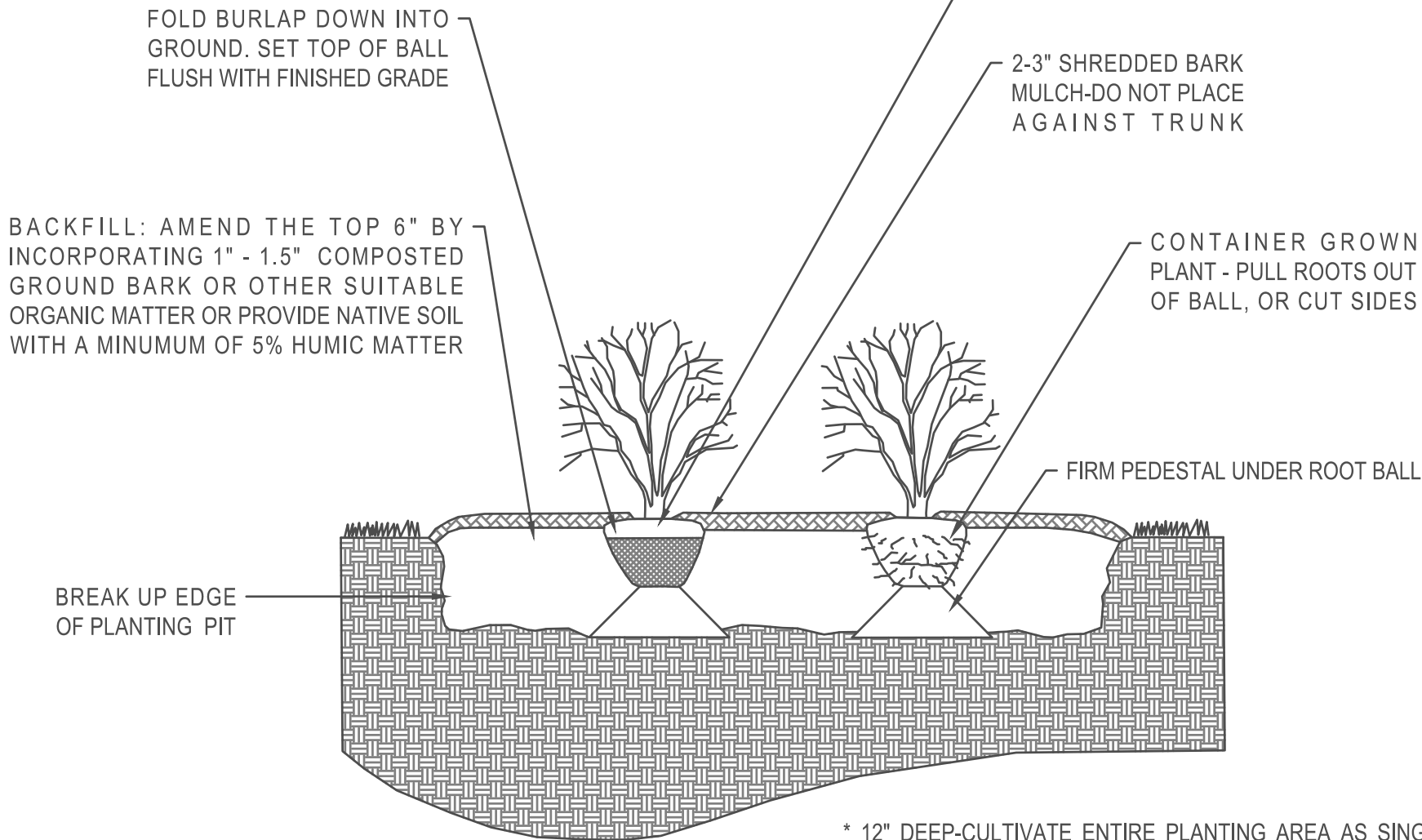
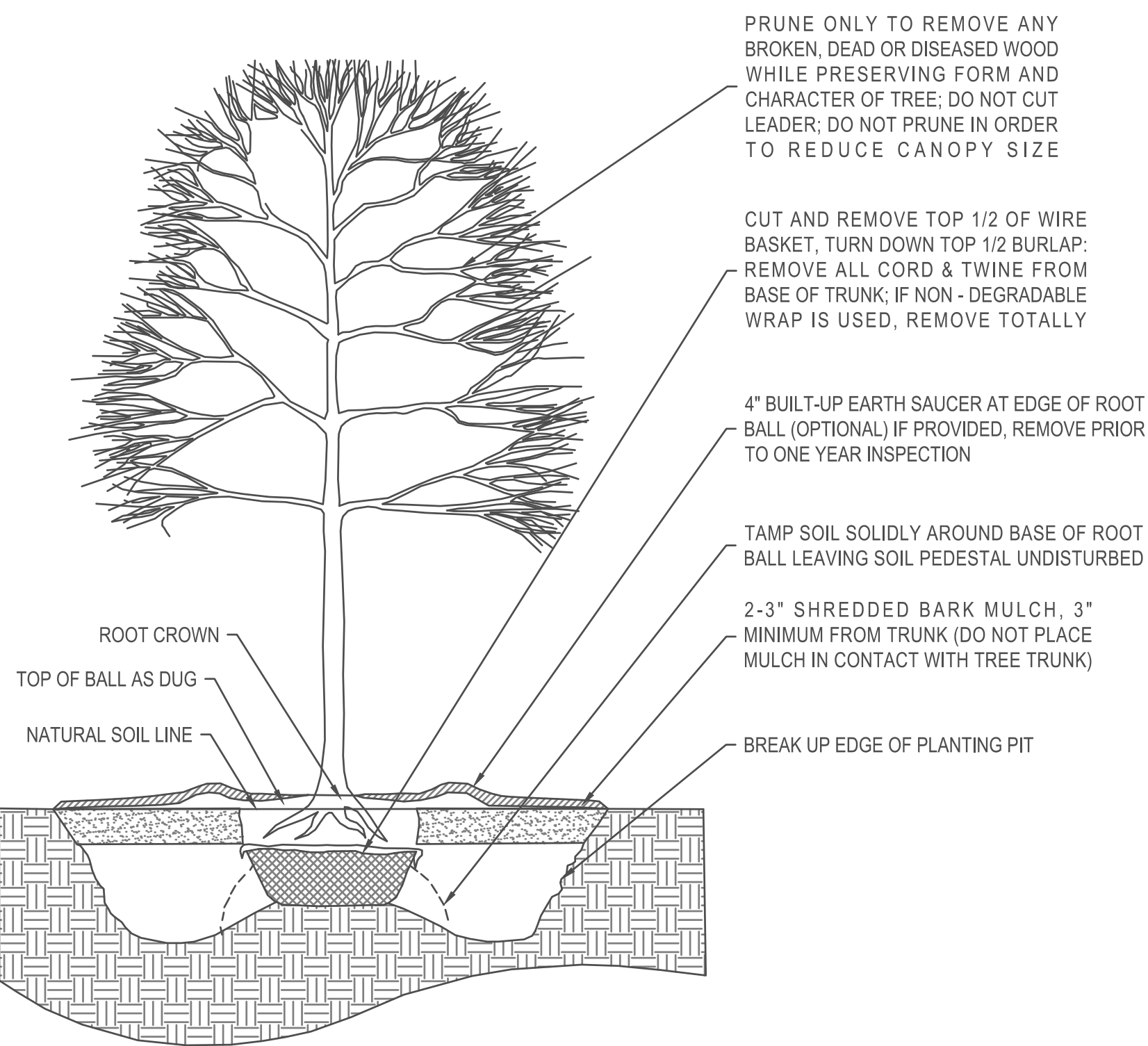
TOWNE PROJ. NUMBER: BZ-23-01
WR JOB NUMBER: 09221052
DRN: WR DGN: WR CKD: WR

u:\22122_10526\21052-4-rivers - wake forest - 3-rivers dairy and CAD drawings\site plan\L2.0 LANDSCAPE DET (PLS).dwg Tuesday, June 6, 2023 5:06:38 PM - DWYATLEY

NOTES

- CONTRACTOR TO VERIFY THAT ADEQUATE DRAINAGE EXISTS PRIOR TO PLANTING.
- DO NOT WRAP TRUNK OF TREE.
- STAKING OF TREES IS NOT RECOMMENDED, EXCEPT ON WINDY SITES OR FOR LARGE EVERGREEN TREES. IF STAKING IS DONE, FLEXIBLE STRAPS - NOT HOSE AND WIRE - SHOULD BE USED AND MUST BE REMOVED AT APPROPRIATE TIME. PROPERTY OWNER IS RESPONSIBLE FOR REPLACEMENT OF DESTROYED OR DAMAGED TREES.
- ALL TREES SHALL CONFORM TO THE STANDARDS SET FORTH IN THE MOST RECENT AMERICAN STANDARDS FOR NURSERY STOCK PUBLISHED BY THE AMERICAN ASSOCIATION OF NURSERYMEN (A.A.N.).
- TREES WITH ROOT FLARE COVERED BY MORE THAN 1.5" OF SOIL WILL BE REJECTED PRIOR TO INSTALLATION.

TREE PLANTING DETAIL (LAN-37)
NTS



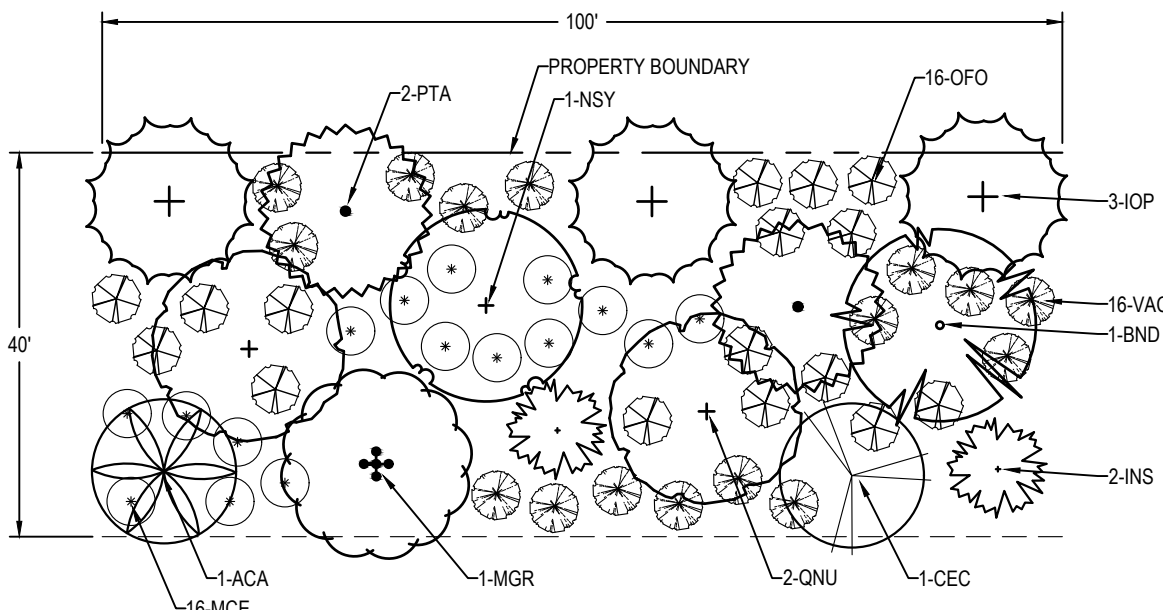
NOTES

- ALL SHRUBS SHALL CONFORM TO THE STANDARDS SET FORTH IN THE MOST RECENT AMERICAN STANDARDS FOR NURSERY STOCK PUBLISHED BY THE AMERICAN ASSOCIATION OF NURSERYMEN (A.A.N.).
- SOIL ANALYSIS SHALL BE OBTAINED PRIOR TO PLANTING. SOIL SHALL BE AMENDED AS RECOMMENDED.
- SHEET PREPARATION OF BEDS IS HIGHLY PREFERRED TO INDIVIDUAL DUG HOLE.S.

SHRUB/GROUNDCOVER PLANTING DETAIL (LAN-38)
NTS

PLANT SCHEDULE									
KEY	QTY	BOTANICAL NAME	COMMON NAME	ROOT	CALIPER (MINIMUM)	HEIGHT (MINIMUM)	TYPE	USE	NOTES
CANOPY TREES									
PCH	12	<i>Pistacia chinensis</i>	Chinese Pistache	B&B	1.5"	8'	D	VUA & TREE CREDITS	MATCHED
UPB	22	<i>Ulmus parvifolia</i> 'Bosque'	Chinese Elm	B&B	1.5"	8'	D	ST & TREE CREDITS	MATCHED
ACR	8	<i>Quercus nuttallii</i>	Nuttall Oak	B&B	1.5"	8'	D	SPECIMEN TREE REPLACEMENT	MATCHED
BND	8	<i>Betula nigra</i> 'Duraheat'	River Birch	B&B	1.5"	8'	D	SPECIMEN TREE REPLACEMENT	MATCHED
SHRUBS									
AGR	35	<i>Abelia x grandiflora</i>	Glossy Abelia	CONT.		18"	E	VUA	MATCHED
ICB	39	<i>Ilex cornuta</i> 'Burfordii Nana'	Dwarf Burford Holly	CONT.		18"	E	VUA	MATCHED
TOE	12	<i>Thuja occidentalis</i> 'Emerald'	Emerald Arborvitae	CONT.		18"	E	SCREEN	MATCHED
TYPE / USE LEGEND									
PLANT TYPE: E = EVERGREEN / D = DECIDUOUS / SE = SEMI-EVERGREEN / H = HERBACEOUS									
PLANT USE: ST = STREET TREE / VUA = VEHICULAR USE AREA / SCREEN = DUMPSTER									

RECOMMENDED BUFFER PLANT LIST									
KEY	BOTANICAL NAME	COMMON NAME	ROOT	CALIPER (MINIMUM)	HEIGHT (MINIMUM)	TYPE	USE	NOTES	
CANOPY TREES									
BND	<i>Betula nigra</i> 'Dura Heat'	Dura Heat River Birch	B&B	1.5"	8'	D	BUFFER	MATCHED	
IOP	<i>Ilex opaca</i>	American Holly	B&B	1.5"	8'	E	BUFFER	MATCHED	
MGR	<i>Magnolia grandiflora</i>	Southern Magnolia	B&B	1.5"	8'	E	BUFFER	MATCHED	
NSY	<i>Nyssa sylvatica</i>	Black Gum	B&B	1.5"	8'	D	BUFFER	MATCHED	
PTA	<i>Pinus taeda</i>	Loblolly Pine	B&B	1.5"	8'	E	BUFFER	MATCHED	
QNU	<i>Quercus nuttallii</i>	Nuttall Oak	B&B	1.5"	8'	D	BUFFER	MATCHED	
UNDERSTORY / ORNAMENTAL TREES									
ACA	<i>Amelanchier canadensis</i>	Serviceberry	B&B	1"	6'	D	BUFFER	MATCHED	
CEC	<i>Cercis canadensis</i>	Eastern Redbud	B&B	1"	6'	D	BUFFER	MATCHED	
INS	<i>Ilex x 'Nellie R. Stevens'</i>	Nellie Stevens' Holly	B&B	1"	6'	E	BUFFER	MATCHED	
SHRUBS									
MCE	<i>Myrica cerifera</i>	Southern Wax Myrtle	CONT.		36"	E	BUFFER	MATCHED	
OFO	<i>Osmanthus x fortunei</i>	Fortune's Tea Olive	CONT.		36"	E	BUFFER	MATCHED	
VAC	<i>Viburnum awabuki</i> 'Chindo'	Chindo Viburnum	CONT.		36"	E	BUFFER	MATCHED	
TYPE / USE LEGEND									
PLANT TYPE: E = EVERGREEN / D = DECIDUOUS / SE = SEMI-EVERGREEN / H = HERBACEOUS									
PLANT USE: BUFFER = PERIMETER BUFFER									
NOTE									
THIS PLANT SCHEDULE IS TO BE USED IF EXISTING VEGETATION DOES NOT SATISFY THE MINIMUM BUFFER REQUIREMENTS & REQUIRES SUPPLEMENTAL PLANTING									



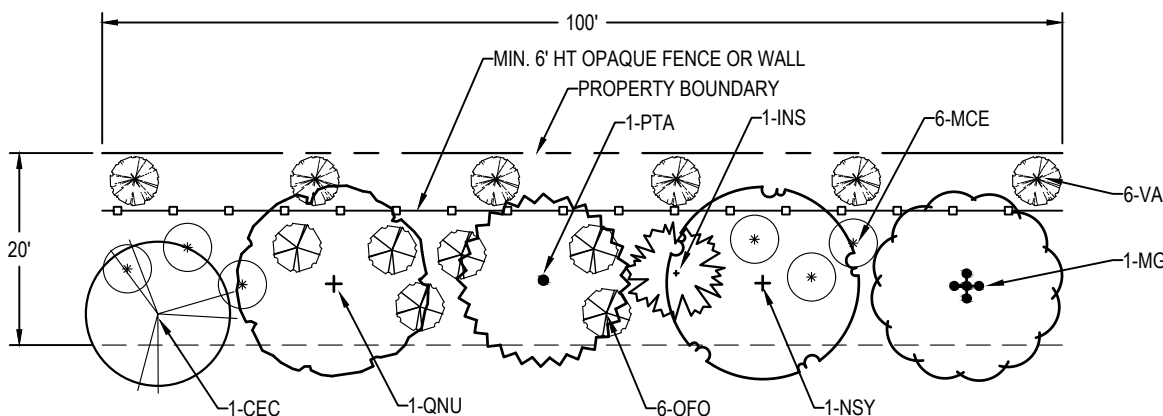
40' TYPE 'A' BUFFER - TYPICAL 100' SECTION

SCALE: 1" = 20'

REQUIREMENTS:

- 6 EVERGREEN TREES PER 100 LF
- 4 CANOPY TREES PER 100 LF
- 4 UNDERSTORY TREES PER 100 LF
- 48 SHRUBS PER 100 LF

NOTE: THIS DETAIL IS TO BE USED IF EXISTING VEGETATION DOES NOT SATISFY THE MINIMUM BUFFER REQUIREMENTS AND REQUIRES SUPPLEMENTAL PLANTING



20' TYPE 'A' BUFFER - TYPICAL 100' SECTION

SCALE: 1" = 20'

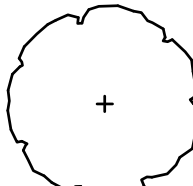
REQUIREMENTS:

- 2 EVERGREEN TREES PER 100 LF
- 2 CANOPY TREES PER 100 LF
- 3 UNDERSTORY TREES PER 100 LF
- 18 SHRUBS PER 100 LF
- MIN. 6' HT OPAQUE FENCE OR WALL

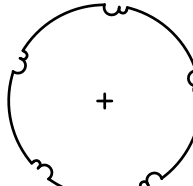
NOTE: THIS DETAIL IS TO BE USED IF EXISTING VEGETATION DOES NOT SATISFY THE MINIMUM BUFFER REQUIREMENTS AND REQUIRES SUPPLEMENTAL PLANTING

BUFFER SYMBOL KEY:

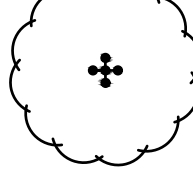
CANOPY TREES:



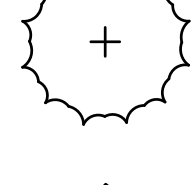
QNU - QUERCUS NUTTALLII



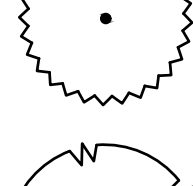
NSY - NYSSA SYLVATICA



MGR - MAGNOLIA GRANDIFLORA



IOP - ILEX OPACA

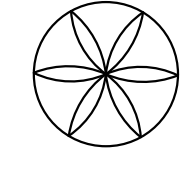


PTA - PINUS TAEDA

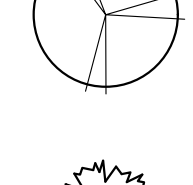


BND - BETULA NIGRA 'DURA HEAT'

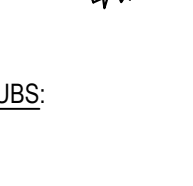
UNDERSTORY TREES:



ACA - AMELANCHIER CANADENSIS

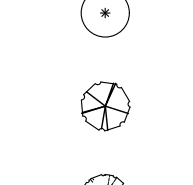


CEC - CERCIS CANADENSIS



INS - ILEX x 'NELLIE R. STEVENS'

SHRUBS:



MCE - MYRICA CERIFERA



OFO - OSMANTHUS x FORTUNEI



VAC - VIBURNUM AWABUKI 'CHINDO'

LANDSCAPE CALCULATIONS:

8.3 TREE CANOPY COVERAGE - RURAL & SUBURBAN DISTRICTS
REQUIREMENT: 2 CANOPY TREES PER 5,000 SF OF PARCEL AREA OR 1 CANOPY TREE & 1 UNDERSTORY TREE PER 4,000 SF OF PARCEL AREA

PARCEL AREA: 114,944.25 SF

DEDUCT WATERCOURSE BUFFER AND WETLANDS: 44,301 SF

REQUIRED: 29 CANOPY TREES OR 18 CANOPY TREES & 18 UNDERSTORY TREES

PROVIDED: 7 PRESERVED CANOPY TREES (SEE BELOW) & 22 PROPOSED PLANTED CANOPY TREES

TOTAL = 29 CANOPY TREE CREDITS

8.4 TREE PRESERVATION

CREDIT FOR PRESERVATION OF WOODED AREA: 1 / 700 SF
TREE PRESERVATION AREA: 4,900 SF / 700 = 7 TREE CREDITS

TREE PRESERVATION AREA INCLUDES (1-8" MAPLE, 1-8" GUM, 1-9" OAK, 1-10" PINE, 3-11" GUM, 1-12" GUM, 1-13" GUM, 1-13" PINE, 1-14" PINE, 3-15" PINE, 1-17" PINE, 1-18" PINE, 1-19" PINE, 1-21" PINE, 1-24" PINE)

8.4.3 SPECIMEN TREES

SPECIMEN TREES SHALL BE REPLACED AT A RATE OF 4 NEW CANOPY TREES PER SPECIMEN TREE REMOVED, ABOVE AND BEYOND CODE REQUIRED PLANTINGS (AS DETERMINED BY THE ZONING ADMINISTRATOR)

SPECIMEN TREES REMOVED: 4 (1-PINE 20", 1-PINE 20", 1-PINE 23", 1-OAK 25")
REPLACEMENT TREES PROVIDED: 16 CANOPY TREES

8.5 BUFFERS

20' STREET YARD BUFFER: 154 LF

EXISTING VEGETATION WHICH MEETS THE MINIMUM STANDARDS FOR A TREE SAVE AREA: OR A 20' BUFFER CONTAINING THE PLANTINGS REQUIRED IN A TYPE 'B' BUFFER - OPTION 1; OR A COMBINATION OF BOTH

TYPE 'B' BUFFER OPTION 1 REQUIREMENTS

2 EVERGREEN TREES PER 100 LF

2 CANOPY TREES PER 100 LF

2 UNDERSTORY TREES PER 100 LF

24 SHRUBS (50% EVERGREEN)

3 EVERGREEN TREES

3 CANOPY TREES

3 UNDERSTORY TREES

37 SHRUBS (15 EVERGREEN)

40' TYPE 'A' BUFFER:

REQUIREMENT: 396 LF

6 EVERGREEN TREES PER 100 LF

4 CANOPY TREES PER 100 LF

4 UNDERSTORY TREES PER 100 LF

48 SHRUBS PER 100 LF

23 EVERGREEN TREES

15 CANOPY TREES

185 SHRUBS

20' TYPE 'A' BUFFER:

REQUIREMENT: 598 LF

2 EVERGREEN TREES PER 100 LF

2 CANOPY TREES PER 100 LF

3 UNDERSTORY TREES PER 100 LF

18 SHRUBS PER 100 LF

MIN. 6' HT OPAQUE FENCE OR WALL

12 EVERGREEN TREES

12 CANOPY TREES

18 UNDERSTORY TREES

108 SHRUBS

MIN. 6' HT OPAQUE FENCE OR WALL

8.6 STREET TREES

REQUIREMENT: 1 CANOPY TREE PER 50 LF OF PLANTING AREA

FRIENDSHIP CHAPEL RD

REQUIREMENT: 423 LF

9 CANOPY TREES

9 CANOPY TREES

JONES DAIRY RD

REQUIREMENT: 204 LF

4 CANOPY TREES

4 CANOPY TREES

8.7 VEHICULAR USE AREA SCREENING & LANDSCAPING

REQUIREMENT: ALL OFF-STREET PARKING AREAS AND SERVICE AREAS ADJACENT TO AND/OR VISIBLE FROM A PUBLIC RIGHT-OF-WAY AND ADJACENT PROPERTIES SHALL BE SCREENED FROM VIEW

ALL PARKING SPACES OR PORTIONS THEREOF SHALL BE WITHIN 60 FEET OF A PLANTED CANOPY TREE

8.8 DUMPSTERS AND MECHANICAL UTILITIES SCREENING

REQUIREMENT: ALL DUMPSTERS, LOADING DOCKS, OUTDOOR STORAGE AREAS AND UTILITY STRUCTURES, WHICH ARE VISIBLE FROM A PUBLIC STREET OR ADJACENT PROPERTY LINE, SHALL BE SCREENED UNLESS ALREADY SCREENED BY AN INTERVENING BUFFER YARD.

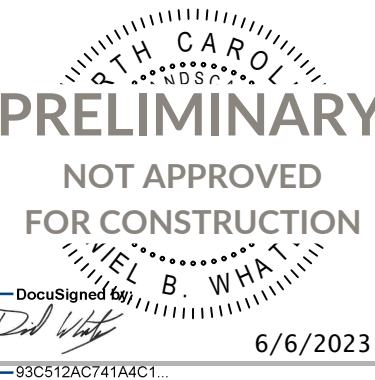
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SITE MASTER PLAN
4RIVERS - WAKE FOREST
SELF STORAGE



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TOWN OF WAKE FOREST COMMENTS

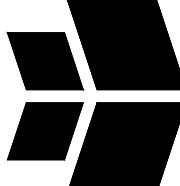
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LANDSCAPE DETAILS

L2.0



1200 EAST MOREHEAD STREET,
SUITE 200
CHARLOTTE, NC 28204

300 JONES DAIRY ROAD | WAKE FOREST, NC | WAKE COUNTY

u:\2022\105021052\4-rivers - wake forest - wake forest - jones dairy encl\40 drawing\site plan\SL1 Lighting Plan.dwg Tuesday, June 6, 2023 1:04:59 PM DWG:MATEY

CURVE TABLE					
CURVE	ARC LEN.	RADIUS	DELTA ANG.	CHORD BRG.	CHORD LEN.
C1	237.36'	3,965.00'	003°25'48"	N 66°10'14" E	237.32'
C2	4.42'	50.00'	005°03'58"	N 71°13'50" E	4.42'
C3	49.51'	19,970.00'	000°08'31"	S 27°45'48" E	49.51'
C4	125.29'	19,970.00'	000°21'34"	S 27°30'43" E	125.29'

PARKING LOT PHOTOMETRIC SCHEDULE	
AVERAGE FOOT-CANDLES	2.98
MAXIMUM FOOT-CANDLES	4.7
MINIMUM FOOT-CANDLES	1.4
MINIMUM TO MAXIMUM FC RATIO	0.3
MAXIMUM TO MINIMUM FC RATIO	3.32
AVERAGE TO MINIMUM FC RATIO	2.1

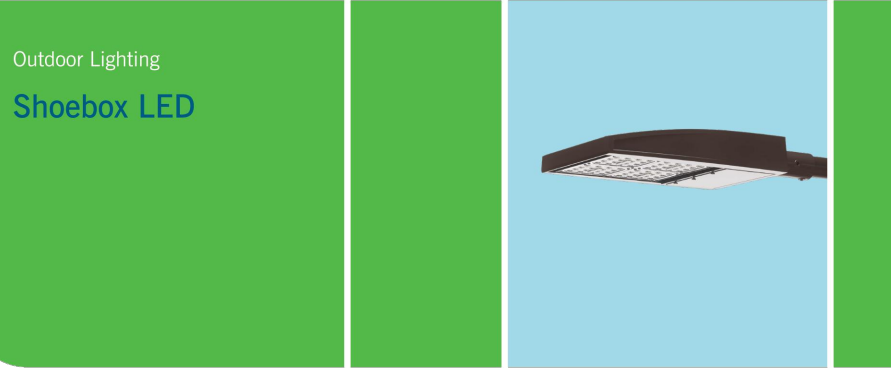
LUMINAIRE SCHEDULE								
CALLOUT	SYMBOL	LAMP	DESCRIPTION			BALLAST	MOUNTING	MODEL
SHOE-420-IV		(128) 420W	GALLEON AREA AND ROADWAY LUMINAIRE(8) 70 CRI, 4000K LIGHTSQUARES WITH 16 LEDS EACH AND TYPE IV SPILL LIGHT ELIMINATOR OPTICS			ELECTRONIC	POLE	EATON - STREETWORKS (FORMER COOPER LIGHTING), GAN-AX-08-LED-U-SL4-XX-420W

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The energy-efficient Shoobox LED combines a decorative, contemporary style with versatility and simple lighting effect that is perfect for streets, parking lots, commercial buildings and residential communities. The Shoobox LED provides excellent color rendition along with a controlled light pattern that reduces glare and keeps the light directed only where you want it. Available in black, dark bronze, gray or white with one to four fixtures per pole.	LED (Light Emitting Diode)	150, 220, 420, 530 watts
	Mounting heights	25', 30', 35'
	Colors	Black Bronze Gray White
	Poles	Fiberglass (1 or 2 fixtures per pole) Decorative tapered metal Decorative square metal

Note: 30' pole available in black or bronze only.

For additional information, visit us at
dave-weng.com/OutdoorLighting
or call us toll free at 866.769.5417.



Wattage	IES Rating	Light Pattern	Lumens	Color Temp.
LED 150	IES LM-63	IESNA Type V (Circular)	19580	
LED 150	IES LM-64	IESNA Type IV (Forward throw)	18459	
LED 150	IES LM-65	IESNA Type III (oval)	15006	
LED 220	IES LM-64	IESNA Type IV (Circular)	25870	
LED 220	IES LM-64	IESNA Type IV (Forward throw)	24390	4,000K
LED 220	IES LM-64	IESNA Type III (oval)	25114	
LED 420	IES LM-65	IESNA Type V (Circular)	48214	
LED 420	IES LM-65	IESNA Type IV (Forward throw)	43765	
LED 530	IES LM-65	IESNA Type V (Circular)	60296	
LED 530	IES LM-65	IESNA Type IV (Forward throw)	54395	

* These are approximate replacement suggestions; actual conditions could be different.

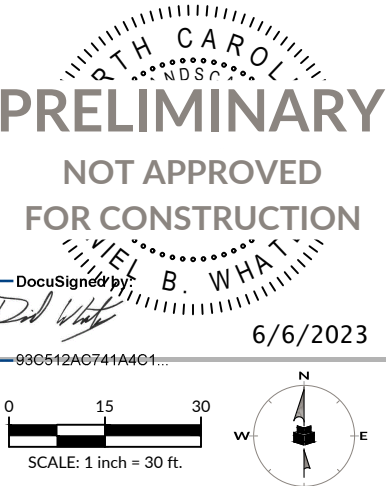
Poles available:		
Name	Mounting height	Color
Round tapered decorative metal*	35'	Black Bronze
Decorative square metal*	25' and 30'	Black Bronze White
Fiberglass	30'	Black (1 or 2 fixtures per pole) Gray (1 or 2 fixtures per pole)
Features		Benefits
Little or no installation cost.		Free up capital for other projects.
Design services by lighting professionals included.		Meets industry standards and lighting ordinances.
Maintenance included.		Eliminates high and unexpected repair bills.
Electricity included.		Less expensive than metered service.
Warranty included.		Worry-free.
One low monthly cost on your electric bill.		Convenience and savings for you.
Turnkey operation.		Provides hassle-free installation and service.
Backed by over 40 years of experience.		A name you can trust today ... and tomorrow.

*2" rated foundation available when required on metal poles only.

SITE MASTER PLAN
4RIVERS - WAKE FOREST
SELF STORAGE

1200 EAST MOREHEAD STREET,
SUITE 200
CHARLOTTE, NC 28204

300 JONES DAIRY ROAD | WAKE FOREST, NC | WAKE COUNTY



INITIAL PLAN DATE: 01/20/2023
REVISIONS:
1 - 03/10/2023
TOWN OF WAKE FOREST COMMENTS
2 - 04/21/2023
TOWN OF WAKE FOREST COMMENTS
3 - 06/06/2023
TOWN OF WAKE FOREST COMMENTS

TOWNE PROJ. NUMBER RZ-23-01
WR JOB NUMBER 09221052
DRN: WR DGN: WR CKD: WR

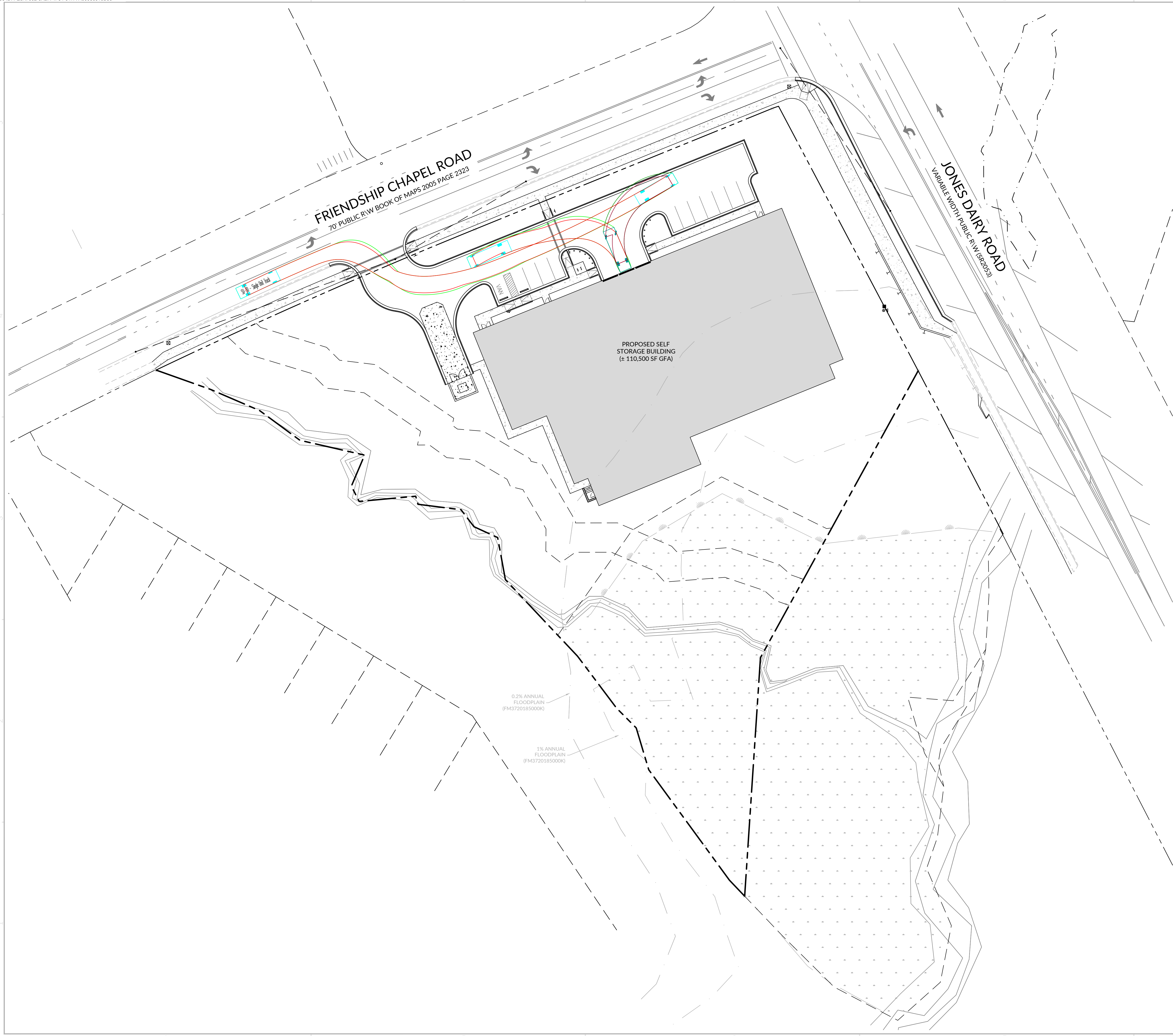
OVERALL LIGHTING PLAN

SL1.0



WithersRavenel
115 McKean Drive | Cary, NC 27511
License #: F-1479 | t: 919.469.3340 | www.withersravenel.com

our people • your success



RECOMMENDATION FOR APPROVAL
BY THE WAKE FOREST
PLANNING BOARD

DATE _____

APPROVAL BY THE
WAKE FOREST BOARD
OF COMMISSIONERS

DATE _____

NORTH CAROLINA
 PRELIMINARY
 NOT APPROVED
 FOR CONSTRUCTION
 DO A. COOPER
 KIRK A. CROMBIE
 6/6/2023


 INITIAL PLAN DATE: 01/20/2023
 REVISIONS:
 1 - 03/10/2023
 TOWN OF WAKE FOREST COMMENTS
 2 - 04/12/23
 TOWN OF WAKE FOREST COMMENTS
 3 - 06/06/23
 TOWN OF WAKE FOREST COMMENTS

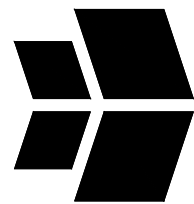
SITE MASTER PLAN

4RIVERS - WAKE FOREST SELF STORAGE

3000 JONES DAIRY ROAD | WAKE FOREST, NC | WAKE COUNTY



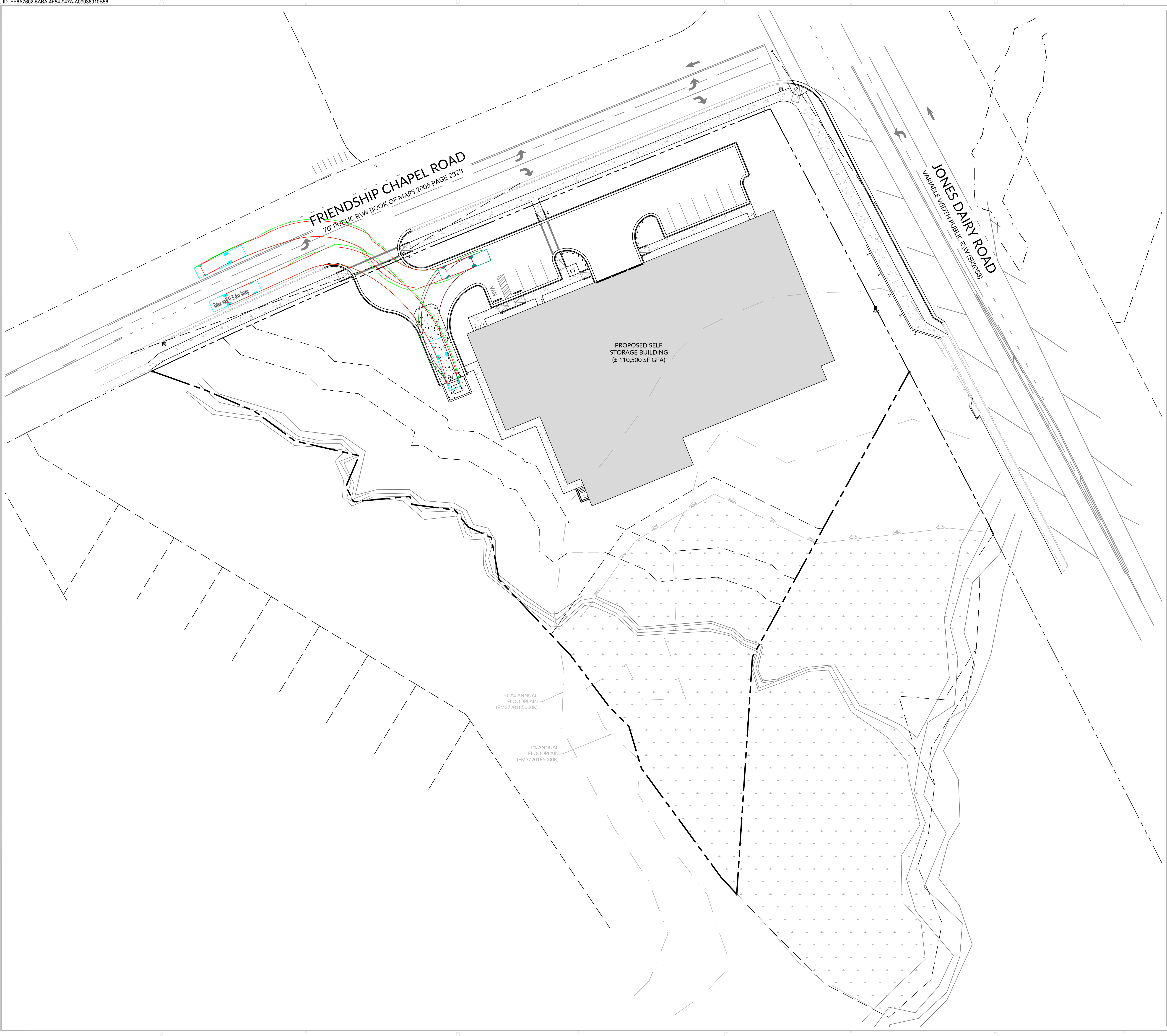
1200 EAST MOREHEAD STREET,
SUITE 280
CHARLOTTE, NC 28204



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u:\22\12\1090\21052-4rivers - wake forest\ - jones dairy and CAD drawing\site plan\4rivers\TP2.0.dwg, Tuesday, June 6, 2023 10:57:46 AM - ANASO4

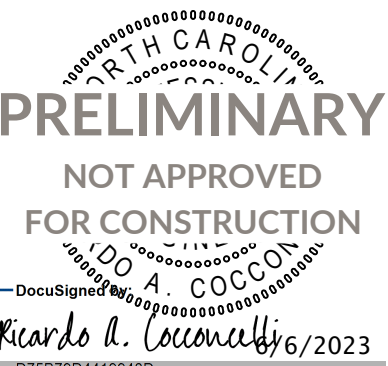


RECOMMENDATION FOR APPROVAL
BY THE WAKE FOREST
PLANNING BOARD

DATE _____

APPROVAL BY THE
WAKE FOREST BOARD
OF COMMISSIONERS

DATE _____



INITIAL PLAN DATE: 01/20/2023
REVISIONS:
1 - 03/10/2023
TOWN OF WAKE FOREST COMMENTS
2 - 04/21/2023
TOWN OF WAKE FOREST COMMENTS
3 - 06/06/2023
TOWN OF WAKE FOREST COMMENTS

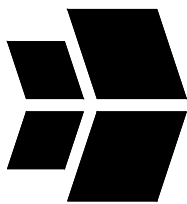
TOWF PROJ. NUMBER: BZ-23-01
WR JOB NUMBER: 09221052
DRN: WR DGN: WR CKD: WR

TRUCK PATH -
GARBAGE TRUCK

TP2.0



1200 EAST MOREHEAD STREET,
SUITE 200
CHARLOTTE, NC 28204



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Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-230-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: September 19, 2023

SUBJECT

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 3 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.

Recommendation:

Item Summary:

ATTACHMENTS

-



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-191-
Submitted by: Courtney Tanner
Submitting Department: Planning
Meeting Date: September 19, 2023

SUBJECT

Approval of AGNC, LLC and Town of Wake Forest Development Agreements for Downtown Streetscape Improvements on N White Street and E Roosevelt Avenue

Recommendation:

Item Summary:

ATTACHMENTS

- [BOC Agenda Summary.pdf](#)
- [Reimbursement Agreement.pdf](#)
- [Exhibit A: N White St & E Roosevelt Ave Streetscape Improvements](#)
- [Resolution.docx](#)

Agenda Item: Approval of AGNC, LLC and Town of Wake Forest Reimbursement Agreement for Downtown Streetscape Improvements on N White Street and E Roosevelt Avenue

Summary: Town's Capital Improvement Plan (CIP) includes Downtown Streetscape Improvements (widened sidewalks, ADA accessibility with ramps, tree pits and soil amendments, street trees and furniture, and architectural pedestrian scaled lighting) that exceed the infrastructure improvements in the Comprehensive Transportation Plan and Unified Development Ordinance. As allowed under NCGS, a town and developer can enter into a reimbursement agreement in order to construct improvements identified in the CIP. This agreement would install CIP streetscape improvements starting at Spring Street and N White Street south along the frontage of Magnolia Trace and CVS and continue east along E Roosevelt Avenue along the frontage of CVS and Park Social. The Town's portion of the project budget is \$3,075,610.71.

The reimbursement agreement was presented to the Board of Commissioners at the September 5th work session.

Attachments: Reimbursement Agreement
Exhibit A: N White St & E Roosevelt Ave Streetscape Improvements Resolution

**STATE OF NORTH CAROLINA
COUNTY OF WAKE**

**STREETSCAPE REIMBURSEMENT AGREEMENT
(N White & E Roosevelt Streetscape Improvements)**

This STREETSCAPE REIMBURSEMENT AGREEMENT (hereinafter the “**Agreement**”) is made and entered into as of the ____ day of _____ 2023 (the “**Effective Date**”) by and between Alliance Group of NC, LLC, a North Carolina limited liability company (“**Developer**”), and the **Town of Wake Forest** North Carolina, a municipal corporation of the State of North Carolina (“**Town**”). Developer and Town may sometimes be referred to individually as a “**Principal Party**” and collectively as the “**Principal Parties**.”

RECITALS

WHEREAS, the Developer is required to install public improvements (e.g., sidewalks, ADA accessibility with ramps) consistent with the Comprehensive Transportation Plan (CTP) and Unified Development Ordinance (UDO) adjacent to their project on certain tracts of land located at 303 E Roosevelt Avenue and 150 N White Street, Wake Forest North Carolina, commonly referred to as “Park Social” and “Magnolia Trace”, respectively;

WHEREAS, the Town Capital Improvement Plan (CIP) includes Downtown Streetscape Improvements (“**Improvements**”) for the Downtown (widened sidewalks, ADA accessibility with ramps, tree pits and soil amendments, street trees and furniture, and architectural pedestrian scaled lighting) that exceed CTP and UDO requirements;

WHEREAS, the restoration and revitalization of historic Downtown Wake Forest has and continues to be a top priority to the Town of Wake Forest as evidenced through the Town’s recent project of updating its Renaissance Plan; and

WHEREAS, pursuant to the authority granted to the Town by N.C.G.S. § 160A-499, the Town and the Developer desire to enter into this Agreement to set forth the terms and conditions relative to the Improvements as well as the cost participation agreed to by the Town;

WHEREAS, the Town has determined that the cost to the Town in reimbursing the Developer for the design and construction of the Improvements would cost less than if the Town were to design and construct the Downtown Streetscape Improvements through a contract pursuant to N.C.G.S. § 143-128 *et. seq.*;

WHEREAS, as required by N.C.G.S. § 160A-499, the Improvements are included in the Town's CIP and the Town has enacted ordinances setting forth procedures and terms under which reimbursement agreements may be approved;

WHEREAS, the Town is authorized to enter into this Agreement pursuant to N.C.G.S. § 160A-16, and may contract with the Developer to carry out the public purposes set forth herein pursuant to N.C.G.S. §160A-20.1 and the Town's Board of Commissioners has determined that it is in the best interests of its citizens to do so;

WHEREAS, the Parties have agreed to jointly design, construct, and fund the Developer Improvements and the Town Improvements in accordance with the terms of this Agreement (the Developer Improvements and the Town Improvements, collectively the "**Development Plan**");

WHEREAS, the Development Plan means the construction plans submitted to the Town by the Developer and identified by the Town as N White and E Roosevelt Streetscape Improvements Construction Plans (Exhibit A).

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Town of Wake Forest expresses its support for and commitment to the Developer in the following manner:

THE AGREEMENT

1. **Recitals.** The parties agree that the foregoing recitals are true and correct and are incorporated herein by reference.
2. **Downtown Streetscape Improvements.** The Developer hereby agrees to include the Improvements, including a bus shelter on E Roosevelt, consistent with CIP in the design and construction of the N White & E Roosevelt Streetscape Improvements Construction Plans (Exhibit A).
3. **Public Acceptance of Streetscape Improvements.** Upon completion of the Improvements, the appropriate public entity shall accept and maintain said Improvements in accordance with customary policies and procedures regarding acceptance.
4. **The Reimbursement.** In consideration of the agreement on the part of the Developer to include the Improvements, and the public benefits derived therefrom, the Town shall reimburse the Developer for the additional costs incurred by Developer as a result of Developer's inclusion of the Improvements (the "**Reimbursement**"). An estimate of the cost of the Reimbursement is set forth on the Project Budget attached hereto as Exhibit B and incorporated herein by this reference (the "**Project Budget**"); provided, the Reimbursement shall be subject to the Reimbursement Cap (as defined herein below). The Town shall not reimburse the Developer for costs of the Improvements in excess of the amount shown on the Project Budget ("**Excess Costs**"), except that in the event of unforeseen circumstances beyond Developer's control that materially increase the cost of the Improvements, including, but not limited to, materials price increases or unforeseen construction standards that directly increase costs. The Developer may submit a written request to amend the Project Budget to the Town's Chief Financial Officer. Any written request to amend the Project Budget shall include sufficient detail to allow the Town to determine whether the proposed increase is justified, including but not limited to evidence that the unforeseen cost increase is material and related to the Improvements. For the purposes of this section, an unforeseen cost increase shall be considered material when it results in an increase of over One Thousand Dollars (\$1,000) for any line item in the Reimbursement Estimate or over Five Thousand Dollars (\$5,000) on a cumulative basis. Notwithstanding

anything herein to the contrary, under no circumstances shall the Reimbursement exceed \$3,075,610.71 (the “**Reimbursement Cap**”). The Developer and Town understand and agree that any changes to the terms of the Reimbursement, including any increase in the Project Budget, are subject to the prior written approval of the Town’s Chief Financial Officer and, if applicable, the discretion and approval of the Town’s Board of Commissioners to appropriate any additional funds to the Development Plan.

The Reimbursement shall be payable in quarterly installments, with invoices sent to Assistant Town Manager Snyder for prior written approval (“**Application for Payment**”). Each Application for Payment shall indicate the percentage of completion of each portion of the Improvements. Developer shall submit each Application for Payment, and upon approval of the Application for Payment, the Town shall remit payment to the Developer within thirty (30) days thereafter; provided that, under no circumstances shall the final installation payment be made to the Developer until the Improvements have reached substantial completion, as determined by the Town. For the purposes of the Reimbursement, “cost(s)” means the amount of costs actually incurred for design, engineering, construction, project accounting, and construction management of the Improvements upon final completion thereof. Excluded from the Reimbursement shall be legal fees and administrative costs (including but not limited to profit and overhead) of the Developer.

5. **Developer’s Duties to Collaborate with Town.** At all times during this Agreement, the Developer shall comply with all Laws, including without limitation Town’s UDO and agree to engage with the Town in an active and collaborative relationship regarding this agreement and specifically:
 - a) Engage in an exploratory process with the Town allowing Town to play a significant role in design and construction of the Development Plan beyond a traditional regulatory role, and
 - b) Design, and construct, to meet the vision, goals and community standards found in the Renaissance Plan and other Town agreements or policies applicable to this agreement and Town Laws, and
 - c) Ensure completion of the project by June 30, 2025, and
 - d) The Developer will meet monthly with the Assistant Town Manager Snyder or designee to document progress of the Development Plan, and
 - e) Prioritize green infrastructure and public art whenever possible.
6. **Town’s Duties to Cooperate with Developer.** At all times during this Agreement, Town agrees to cooperate and assist the Developer in connection with the Developer’s duties under Section 5 above. Specifically, Town agrees to:
 - a) Provide informal review of design sketches, preliminary plans, renderings, models and other similar documentation or information to facilitate efficient and effective accomplishment of the Developer’s duties established in this Agreement, and
 - b) Provide information, suggestions, and comments in a collaborative approach as to the design, integration, and harmony of the Development Plan with nearby supporting neighborhoods, and other assets located in the area, and
 - c) Provide updates to the Developer as to the status of other public initiatives and investments adjacent to the Development Plan until public acceptance of the Improvements .
7. **Maintenance.** The Developer shall be responsible for maintenance of the Improvements at all times prior to the Acceptance Date.

8. **Insurance.** For the period of time prior to the Acceptance Date, the Developer shall maintain insurance policies with minimum limits as follows:

Coverage	Minimum Limits
Workers' Compensation	\$ 1,000,000
Statutory Limits	\$ 1,000,000
Employers' Liability	\$ 1,000,000
General LiabilityAutomobile Liability	\$500,000
Professional Liability (E & O) (If Required)	\$ 1,000,000

Upon request, the Developer shall provide the Town with a Certificate of Insurance. All Certificates of Insurance will require thirty (30) days written notice by the insurer or Developer's agent in the event of cancellation, reduction or other modifications of coverage. In addition to the notice requirement above, Developer shall provide the Town with immediate written notice of cancellation, reduction, or other modification of coverage of insurance. Upon failure of the Developer to provide such notice, the Developer assumes sole responsibility for all losses incurred by the Town for which insurance would have provided coverage. The insurance certificate shall be for the initial period of one (1) year and shall be renewed by the Developer throughout the period of time prior to the Acceptance Date. The Town shall be listed as certificate holder and named as an additional insured under General Liability. It is required that coverage be placed with "A" rated insurance companies acceptable to the Town. Failure to maintain the required insurance in force may be cause for termination of this Agreement. If the Developer fails to maintain and keep in force the insurance herein required, the Town has the right to cancel and terminate this Agreement without notice. The Developer shall provide proof that a Drug-Free Workplace Program is in place and that drivers meet DOT/CDL licensing requirements, if requested.

9. **Notice.** All notices and other communications required or permitted by this Agreement shall be in writing and shall be given by either personal delivery or certified United States mail, return receipt requested, addressed as follows:

To the Town:

Town of Wake Forest
Attn: Town Manager
301 S. Brooks Street
Wake Forest, NC 27587
Email: kpadgett@wakeforestnc.gov

To the Developer:

Alliance Group of NC, LLC
Attn: Jacob Anderson
7208 Falls of Neuse Road, Suite 101
Raleigh, NC 27615
Email: jacob@alliancegroupnc.com

With a copy to (may be sent by email and first class mail only):
Town Attorney
301 S. Brooks St.
Wake Forest, NC 27857
Email: hkingsberry@wakeforestnc.gov

A change of address or person to receive notice may be made by either party by notice given to the other party. Any notice or other communication under this Agreement shall be deemed given at the time of actual delivery, if it is personally delivered. If the notice or other communication is sent by US Mail, it shall be deemed given upon the third calendar day following the day on which such notice or other communication is deposited with the US Postal Service or upon actual delivery, whichever occurs first.

10. **Indemnification.** To the maximum extent allowed by law, the Developer shall indemnify and save harmless the Town, its agents, officers, and employees, from and against all charges that arise in any manner from, in connection with, or out of this Agreement proximately caused by the negligent acts or omissions of the Developer or subcontractors or anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable except for damage or injury caused solely by the negligence of the Town, its agents, officers, or employees. As used in this subsection, “charges” means claims, judgments, costs, damages, losses, demands, liabilities, duties, obligations, fines, penalties, royalties, settlements, expenses, interest, reasonable attorney’s fees, and amounts for alleged violations of sedimentation pollution, erosion control, pollution, or other environmental laws, regulations, ordinances, rules, or orders. Nothing in this section shall affect any warranties in favor of the Town that are otherwise provided in or arise out of this Agreement. This section is in addition to and shall be construed separately from any other indemnification provisions that may be in this Agreement. This section shall remain in force despite termination of this Agreement (whether by expiration of the term or otherwise) and termination of the services of any supplemental agreement entered into under the Agreement.
11. **Term and Termination.** This Agreement shall commence upon the Effective Date and shall continue until the Town has paid the Reimbursement to the Developer. Notwithstanding the foregoing, the Town may terminate this Agreement if either: (a) commencement of construction of the Improvements has not begun by December 31, 2023; or (b) the Improvements are not substantially completed in a good and workman-like manner in accordance with all applicable laws and the applicable standards within twenty-four (24) months following commencement, subject, however to a day for day extension of the twenty-four (24) month completion period for *Force Majeure*, as established by the Developer to the reasonable satisfaction of the Town. Notwithstanding the foregoing, the Developer may terminate this Agreement at any time upon written notice to the Town if, in its discretion, it decides not to develop the Property. “*Force Majeure*” means, as applicable, any acts of God, strikes, lockouts or other industrial disturbances, COVID-19 or other pandemics, unusual adverse weather conditions, terrorism or other acts of the public enemy, wars, blockades, insurrections, riots, epidemics, landslides, lightning, earthquakes, fires, tornadoes, hurricanes, floods, high-water washouts, or other matters outside of the Developer’s reasonable control.
12. **Public Contracts.** Unless otherwise noted, this Agreement is not subject to Article 8 of Chapter 143 of the North Carolina General Statutes, except that the Developer shall advertise and award bids in accordance with Article 8 of Chapter 143 of the General Statutes when awarding contracts for the Improvements that would have required competitive bidding if the contract had been awarded by the Town. For purpose of clarity, any construction work done on behalf of the Town would require formal bidding (advertisement, sealed bid, and award to the lowest responsible responsive bidder) where the amount to be paid to the contractor by public funds is in excess of \$500,000. For reimbursements, credits, or payments made by public funds below that amount, informal bidding rules shall apply which requires the work to have been awarded to the lowest responsible responsive bidder after three informal proposals have been received.
13. **Default.** The terms and conditions of this Agreement shall be enforceable by the parties by actions for specific performance or injunction in addition to any other remedies available at law or in equity, subject to any defenses that may be asserted, provided that any damages shall be limited to actual and direct damages (and neither party shall be liable hereunder for special, consequential, lost profit or punitive damages) and the non-defaulting party provides due written notice and an opportunity to cure to the defaulting party and the defaulting party fails to cure the breach within fifteen (15) days after receipt of such notice (or if such default cannot be cured within fifteen (15) days using commercially reasonable diligence, then if such party fails to commence to cure within fifteen (15) days after receipt of notice and thereafter complete such cure using commercially reasonable diligence). Any failure or omission of the non-defaulting party to exercise any right

or remedy provided herein shall not be deemed a waiver of such party's right to enforce strictly the defaulting party's obligations in any other instance.

14. **Right-of-Way and/or Easement Acquisition.** The Developer shall secure all necessary easements or rights-of-way for the Improvements that are the subject of this Agreement, prior to commencement of construction of the Development Plan. All costs incurred to secure all necessary easements or rights-of-way for the Improvements are to be borne by the Developer, as further set forth in the Project Budget.
15. **Relationship of the Parties.** This Agreement shall not be considered to create a joint venture, partnership or other legal relationship between the parties or as giving the right of either party to legally bind the other party in any manner or to be able to incur debts or liabilities on behalf of the other party or create a condition in which either party shall share or be responsible for the debts or liabilities of the other party. This Agreement shall not be considered to constitute the appointment of either party as a representative of the other party.
16. **Applicable Law.** This Agreement shall be governed by and construed in accordance with the laws of the State of North Carolina. The parties hereto consent to the jurisdiction of Wake County. Furthermore, this Agreement is entered under the authority of N.C.G.S. § 160A-499, and any provision hereof in conflict with that authority shall be null and void.
17. **Waiver.** No action or failure to act by the Town shall constitute a waiver of any of its rights or remedies that arise out of this Agreement, nor shall such action or failure to act constitute approval of or acquiescence in a breach thereunder, except as may be specifically agreed in writing.
18. **Severability.** If any provision of this Agreement shall be unenforceable, the remainder of this Agreement shall be enforceable to the extent permitted by law.
19. **Performance of Government Functions.** Nothing contained in this Agreement shall be deemed or construed in any way to stop, limit, or impair the Town from exercising or performing any regulatory, policing, legislative, governmental, or other powers or functions.
20. **Assignment, Successors and Assigns.** Without the Town's prior written consent, the Developer shall not assign (which includes to delegate) any of its rights or duties that arise out of this Agreement. Unless the Town otherwise agrees in writing, the Developer and all assigns shall be subject to all of the Town's defenses and shall be liable for all of the Developer's duties that arise out of this Agreement and all of the Town's claims that arise out of this Agreement. Without granting the Developer the right to assign, it is agreed that the duties of the Developer that arise out of this Agreement shall be binding upon it and its heirs, personal representatives, successors, and assigns.
21. **Town Policy.** THE TOWN OPPOSES DISCRIMINATION ON THE BASIS OF RACE AND SEX AND URGES ALL OF ITS CONTRACTORS TO PROVIDE A FAIR OPPORTUNITY FOR MINORITIES AND WOMEN TO PARTICIPATE IN THEIR WORK FORCE AND AS SUBCONTRACTORS AND VENDORS UNDER TOWN CONTRACTS.
22. **EEO Provisions.** During the performance of this Agreement, the Developer shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, national origin, political affiliation or belief, age, or handicap. The Developer shall take affirmative action to ensure that applicants are employed and that employees are treated equally during employment, without regard to race, color, religion, sex, national origin, political affiliation or belief, age, or handicap. The Developer shall post in conspicuous places available to employees and applicants for employment, notices setting forth these EEO provisions. All solicitations or

advertisements for employees placed by or on behalf of the Developer shall state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, political affiliation or belief, age, or handicap.

23. **Principles of Interpretation.** In this Agreement, unless the context requires otherwise, the singular includes the plural and the plural the singular. The pronouns “it” and “its” include the masculine and feminine. Reference to statutes or regulations include all statutory or regulatory provisions consolidating, amending, or replacing the statute or regulation. References to contracts and agreements shall be deemed to include all amendments to them. The word “person” includes natural persons, firms, companies, associations, partnerships, trusts, corporations, governmental agencies and units, and any other legal entities.
24. **Captions.** The captions and headings set forth in this Agreement are for convenience of reference only and shall not be construed as part of this Agreement.
25. **Counterparts.** This Agreement may be executed in any number of counterparts and by different parties hereto in separate counterparts, each of which when so executed shall be an original, but all of which shall together constitute one (1) and the same instrument.
26. **Modifications, Entire Agreement.** A modification of this Agreement is not valid unless signed by both parties and otherwise in accordance with requirements of law. Further, a modification is not enforceable against the Town unless the Town Manager or other duly authorized official signs it for the Town. This Agreement contains the entire agreement between the parties pertaining to the subject matter of this Agreement. With respect to that subject matter, there are no promises, agreements, conditions, inducements, warranties, or understandings, written or oral, expressed or implied, between the parties, other than as set forth or referenced in this Agreement.
27. **E-Verify.** The Developer shall comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes. Further, if the Developer utilizes a subcontractor, Developer shall require the subcontractor to comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes.
28. **Iran Divestment Act.** The Developer certifies that: (i) it is not identified on the Final Divestment List or any other list of prohibited investments created by the NC State Treasurer pursuant to N.C.G.S. § 143-6A-4; (ii) it will not take any action causing it to appear on any such list during the term of this Agreement, and (iii) it will not utilize any subcontractor to provide goods or services hereunder that is identified on any such list.
29. **Divestment from Companies that Boycott Israel.** Developer represents, covenants, and certifies that it is not listed on the list of restricted companies developed and published by the North Carolina State Treasurer as required by N.C.G.S. 147-86.81.
30. **Quality and Workmanship.** All work performed and/or services rendered shall be performed to the satisfaction of the Town of Wake Forest. The work performed and/or services rendered shall not be considered complete, nor applicable payments rendered, until the Town is satisfied with the work performed and/or services rendered.
31. **Non-appropriation clause.** Developer acknowledges that the Town of Wake Forest is a governmental entity, and the contract validity is based upon the availability of public funding under the authority of its statutory mandate. In the event that public funds are unavailable and not appropriated for the performance of the Town of Wake Forest’s obligations under this contract, then this contract shall automatically expire without penalty to the Town of Wake Forest thirty (30) days after written notice to Developer of the unavailability and non-appropriation of public funds. It is expressly agreed that the Town of Wake Forest shall not activate this non-appropriation provision for its convenience or to circumvent the requirements of this contract, but only as an emergency fiscal measure during a substantial fiscal crisis, which affects

generally its governmental operations. In the event of a change in the Town of Wake Forest's statutory authority, mandate and mandated functions, by state and federal legislative or regulatory action, which adversely affects the Town of Wake Forest's authority to continue its obligations under this contract, then this contract shall automatically terminate without penalty to the Town of Wake Forest upon written notice to Developer of such limitation or change in the Town of Wake Forest's legal authority.

32. **No pledge of taxing authority.** The taxing power of the Town of Wake Forest is not pledged directly or indirectly to secure any monies due under this contract.
33. **No waiver of governmental immunity; Violation of law.** Except for waiver of governmental immunity resulting from the execution of a valid contract, the Town of Wake Forest makes no other waiver of governmental immunity. If any provision of the Contract or Agreement is in violation of any legal, statutory or state constitutional prohibition, then such provision(s) shall be unenforceable against the Town of Wake Forest.
34. **Conflict of Interest.** If this is a contract for design, engineering, contract administration or similar services, the Developer will not enter into contracts or agreements with third parties that may present a potential for conflict of interest between the Town of Wake Forest and the third parties regarding the subject matter of this Contract or Agreement.
35. **Public Record.** This Contract or Agreement is subject to disclosure under the public records laws of the State of North Carolina.
36. **Title VI.** During the performance of this contract, the Developer, for itself, its assignees and successors in interest (hereinafter referred to as the "contractor") agrees as follows:
 - a) **Compliance with Regulations:** The contractor shall comply with the Regulation relative to nondiscrimination in Federally-assisted programs of the Town of Wake Forest (hereinafter, "Town") Title 49, Code of Federal Regulations, Part 21, as they may be amended from time to time, (hereinafter referred to as the Regulations), which are herein incorporated by reference and made a part of this contract.
 - b) **Nondiscrimination:** The contractor, with regard to the work performed by it during the contract, shall not discriminate on the grounds of race, color, national origin, sex, religion, age, or disability in the selection and retention of subcontractors, including procurements of materials and leases of equipment. The contractor shall not participate either directly or indirectly in the discrimination prohibited by section 21.5 of the Regulations, including employment practices when the contract covers a program set forth in Appendix B of the Regulations.
 - c) **Solicitations for Subcontractors, Including Procurements of Materials and Equipment:** In all solicitations either by competitive bidding or negotiation made by the contractor for work to be performed under a subcontract, including procurements of materials or leases of equipment, each potential subcontractor or supplier shall be notified by the contractor of the contractor's obligations under this contract and the Regulations relative to nondiscrimination on the grounds of race, color, or national origin.
 - d) **Information and Reports:** The contractor shall provide all information and reports required by the Regulations or directives issued pursuant thereto, and shall permit access to its books, records, accounts, other sources of information, and its facilities as may be determined by the Town to be pertinent to ascertain compliance with such Regulations, orders, and instructions. Where any information required of a contractor is in the exclusive possession of another who fails or refuses to furnish this information the contractor shall so certify to the Town as appropriate and shall set forth what efforts it has made to obtain the information.

- e) Sanctions for Noncompliance: In the event of the contractor's noncompliance with the nondiscrimination provisions of this contract, the Town shall impose such contract sanctions as it or the Town may determine to be appropriate, including, but not limited to:
- (1) withholding of payments to the contractor under the contract until the contractor complies, and/or
 - (2) cancellation, termination, or suspension of the contract, in whole or in part.
- f) Incorporation of Provisions: The contractor shall include the provisions of paragraphs (a) through (f) in every subcontract, including procurements of materials and leases of equipment, unless exempt by the Regulations, or directives issued pursuant thereto. The contractor shall take such action with respect to any subcontract or procurement as the Town may direct as a means of enforcing such provisions including sanctions for noncompliance: Provided, however, that, in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or supplier as a result of such direction, the contractor may request the Town to enter into such litigation to protect the interests of the Town, and, in addition, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

[Remainder of Page Intentionally Blank. Signature Page Follows.]

IN WITNESS THEREOF, the parties have executed this Agreement as of the date first above written.

ATTEST:

By: _____

Name: _____

Title: _____

THE TOWN:

TOWN OF WAKE FOREST,
a North Carolina municipal corporation

By: _____

Name: _____

Title: _____

THE DEVELOPER:

ALLIANCE GROUP OF NC LLC
a North Carolina limited liability company

By: _____

Name: _____

Title: _____

PREAUDIT CERTIFICATION

This instrument has been pre-audited in a manner required by applicable law.

By: _____

Name: _____

Title: _____

EXHIBIT A

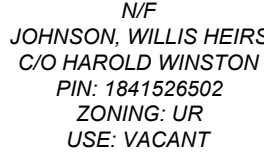
N WHITE & E ROOSEVELT STREETSCAPE IMPROVEMENTS

EXHIBIT B
PROJECT BUDGET

		Park Social	Magnolia Trace	CVS
Survey and Engineering		\$ 31,000.00	\$ 49,000.00	\$ 49,000.00
Power and Lighting		\$ 17,300.00	\$ 140,000.00	\$ -
General Conditions		\$ 65,769.46	\$ 149,859.57	\$ 127,432.73
Earthwork		\$ 34,150.00	\$ 81,950.00	\$ 32,500.00
Street Tree Wells and Grates		\$ 17,000.00	\$ 59,500.00	\$ 85,000.00
Street Tree Install		\$ 59,710.00	\$ 167,735.00	\$ 232,550.00
Concrete Flatwork		\$ 9,000.00	\$ 19,950.00	\$ 15,000.00
Pedestrian Pavers		\$ 56,957.78	\$ 220,611.11	\$ 90,777.78
Striping and Signage		\$ 80,000.00	\$ 50,000.00	\$ 245,000.00
Fixtures and Amenities		\$ 76,250.00	\$ 42,500.00	\$ 42,500.00
Punch-Out		\$ 33,290.98	\$ 74,568.45	\$ 69,660.84
Contingencies		\$ 58,737.10	\$ 125,434.16	\$ 118,146.35
Sureties		\$ 9,966.25	\$ 14,785.00	\$ -
Administration		\$ 64,922.09	\$ 144,882.09	\$ 136,970.22
	Total:	\$ 614,053.66	\$ 1,340,775.38	\$ 1,244,537.92
Credit for Developer Obligations		\$ 49,831.25	\$ 73,925.00	\$ -
	Total:	\$ 564,222.41	\$ 1,266,850.38	\$ 1,244,537.92

OVERALL TOTAL

Park Social	\$ 564,222.41
Magnolia Trace	\$ 1,266,850.38
CVS	\$ 1,244,537.92
Total:	\$ 3,075,610.71



LUMINAIRE SCHEDULE				
SYMBOL	DESCRIPTION	LAMP	HEIGHT (FT)*	QUANTITY
	HOLOPHANE MEMPHIS® TEARDROP LARGE ROADWAY LED PENDANT	(1) LED	18	8

*HEIGHT IS FROM BOTTOM OF BASE TO TOP OF FIXTURE

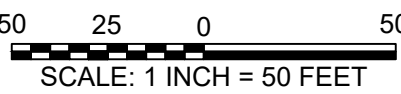
- 
- PROP. TREE
- EX. TREE

1. PLAN DEVELOPED FROM WHITE ST VILLAGE CONSTRUCTION PLANS (SP-21-36) AND WAKE FOREST FOOD HALL CONSTRUCTION PLANS (SP-22-37) BOTH BY FLM ENGINEERING, INC. AND FROM AERIAL IMAGE INTERPRETATION.
2. ALL PAVEMENT MARKINGS SHALL BE THERMOPLASTIC.

POST OFFICE BOX 91727
RALEIGH, NORTH CAROLINA 27675
PHONE: 919.610.1051
FIRM NC LICENSE NUMBER C-4222

[illegible]

ORIGINAL PLAN SIZE: 24" X 36"



SCALE ADJUSTMENT

THIS BAR IS 1 INCH IN LENGTH
ON ORIGINAL DRAWING



IF IT IS NOT 1 INCH ON THIS
SHEET, ADJUST YOUR SCALE
ACCORDINGLY

N WHITE ST AND E ROOSEVELT AVE STREETSCAPE IMPROVEMENTS

DATE:	04-20-2023
SCALE:	AS SHOWN
DESIGNED BY:	FLM
APPROVED BY:	FLM
PROJECT NO.:	23014

C-2

SHEET 2 OF 4



North Carolina 811
www.nc811.org

NORTH CAROLINA
ONE-CALL CENTER
1-800-632-4949

ALL CONSTRUCTION TO BE IN ACCORDANCE WITH ALL TOWN OF WAKE FOREST, CITY OF RALEIGH, AND NCDOT STANDARDS AND SPECIFICATIONS.

© 2023 THIS DRAWING SHALL NOT BE REPRODUCED IN WHOLE OR IN PART WITHOUT WRITTEN PERMISSION OF FLM ENGINEERING, INC.

RESOLUTION 2023-XX

RESOLUTION APPROVING THE REIMBURSEMENT AGREEMENT WITH ALLIANCE GROUP OF NC, LLC FOR N WHITE AND E ROOSEVELT DOWNTOWN STREETScape IMPROVEMENTS

WHEREAS, the Town Capital Improvement Plan (CIP) includes Downtown Streetscape Improvements for the Downtown (widened sidewalks, ADA accessibility with ramps, tree pits and soil amendments, street trees and furniture, and architectural pedestrian scaled lighting); and

WHEREAS, said improvements in the CIP are identified as project alternatives 6 (Wait Avenue: South White Street to Brooks Street) and 7 (North White Street: Northside of CVS to East Spring Street); and

WHEREAS, project alternative 6 inadvertently identifies E Roosevelt Avenue as Wait Avenue due to the fact Wait Avenue changes names at N Taylor Street; and

WHEREAS, pursuant to the authority granted to the Town by N.C.G.S. § 160A-499, the Town and the Developer can enter into a reimbursement agreement for improvements included in the Town's CIP; and

WHEREAS, the Town has determined that the cost to the Town in reimbursing the Developer for the design and construction of the Improvements would cost less than if the Town were to design and construct the Downtown Streetscape Improvements through a contract pursuant to N.C.G.S. § 143-128 et. seq.; and

WHEREAS, the Town has determined that the cost to the Town in reimbursing Alliance Group of NC, LLC for the design and construction is estimated to be \$ 3,075,610.71; and

WHEREAS, terms and conditions of the Streetscape Reimbursement Agreement attached hereto are incorporated herein by this reference;

BE IT RESOLVED that the governing body of the Town of Wake Forest hereby approve the N White & E Roosevelt Streetscape Improvement Reimbursement Agreement.

Adopted and effective this the ____ day of _____ 2023.

Vivian A. Jones

Mayor

ATTEST:

APPROVED AS TO FORM:

Theresa Savary

Town Clerk

Hassan Kingsberry

Town Attorney



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-198-

Submitted by: Elisabeth Palermo

Submitting Department: Engineering

Meeting Date: September 19, 2023

SUBJECT

APPROVAL OF ORDINANCE ADDING CHAPTER 30; ARTICLE IV PARKING, STOPPING, AND
STANDING SECTION 30-164 – ENFORCEMENT OF TEMPORARY PARKING RESTRICTIONS

Recommendation:

Consideration of amendments to Chapter 30 giving the Town the ability to temporarily prohibit parking for the purpose of repair and maintenance work.

Item Summary:

ATTACHMENTS

- [Attachment_A_summary_Temporarily_Enforce_No_Parking.docx](#)
- [Attachment_B_Ordinance_Temporarily_Enforce_No_Parking.docx](#)

Agenda Item: Approval of Adding Chapter 30; Article IV Parking, Stopping, and standing Section 30-164– Enforcement of Temporary Parking Restrictions

Summary: The Engineering Department has been developing a pavement management plan and hopes to begin street rehabilitation and resurfacing work this fall. This ordinance will allow the Town to temporarily prohibit parking on streets where resurfacing and maintenance work is scheduled and enforce towing to violators so that costly delays can be avoided.

Attachment: Attachment_A_summary_Temporarily_Enforce_No_Parking
Attachment_B_Ordinance_Temporarily_Enforce_No_Parking

ORDINANCE 2023-BB

ORDINANCE ADDING CHAPTER 30; ARTICLE IV PARKING, STOPPING, AND STANDING SECTION 30-164 – ENFORCEMENT OF TEMPORARY PARKING RESTRICTIONS

WHEREAS, The Town of Wake Forest is committed to performing necessary maintenance and street rehabilitation to improve the longevity of these assets within the Town's limits.

WHEREAS, parking will not be allowed on streets that are being maintained in order to expedite construction and provide a safe working environment for workers and property.

WHEREAS, other departments in the Town have occasions where street parking needs to be restricted such as special events.

NOW, THEREFORE, BE IT ORDAINED by the Board of Commissioners of the Town of Wake Forest, to amend the Code of Ordinances to prohibit on a temporary basis the parking of vehicles on town roads.

Add:

- (a) The Town Manager, or their duly appointed representative is authorized to prohibit the parking of vehicles on a temporary basis. Circumstances where parking can be prohibited include, but are not limited to the follow:
 - a. Adjacent to curbs where street or public utility repairs or maintenance are being made or are to be made if the parking at those curbs would interfere with the repair or maintenance work.
 - b. Adjacent to the curb where parking would interfere with special events which may be lawfully conducted on the streets or sidewalks of the Town.
 - c. Reserved.
 - d. Reserved.
- (b) It shall be unlawful to park a motor vehicle in prohibited areas after signs, traffic cones, or other devices have been conspicuously placed to give notice that parking is prohibited.

Adopted and effective this 19th day of September 2023.

Vivian A. Jones
Mayor

ATTEST:

APPROVED AS TO FORM:

Theresa Savary
Town Clerk

Hassan Kingsberry
Town Attorney



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-199-

Submitted by: Emma Linn

Submitting Department: Planning

Meeting Date: September 19, 2023

SUBJECT

Approval of a resolution to schedule the public hearing and certify the sufficiency for a petition requesting annexation submitted by Douglas and Sarah Machado for property associated with the rezoning request RZ-23-03, located at 2117 Averette Road being Wake County PINs 1851-90-8235 being approximately 2.822 acres.

Recommendation:

Item Summary:

ATTACHMENTS

- [091923 BOC Agenda Summary AN-23-03.pdf](#)
- [Attachment A Legal Description AN-23-03.pdf](#)
- [Attachment B Annexation Map AN-23-03.pdf](#)
- [Attachment C Contiguous Annexation Petition AN-23-03.pdf](#)
- [CERTIFICATE OF SUFFICIENCY .docx](#)
- [DRAFT PUBLIC HEARING RESOLUTION.docx](#)

Agenda Item: Approval of a resolution to schedule the public hearing and certify the sufficiency for a petition requesting annexation submitted by Douglas and Sarah Machado for property associated with the rezoning request RZ-23-03, located at 2117 Averette Road being Wake County PIN 1851-90-8235 being approximately 2.822 acres.

Summary: The property proposed for annexation is contiguous to the corporate limits of the Town of Wake Forest. The proposed annexation is associated with rezoning case RZ-23-03.

Staff is requesting that the Board accept the petition, adopt the resolution to investigate the annexation petition, certify the sufficiency of the annexation petition, and adopt the resolution setting the public hearing date for the annexation petition.

Attachments: Attachment A Legal Description AN-23-03
Attachment B Annexation Map AN-23-03
Attachment C Contiguous Annexation Petition AN-23-03
Certificate of Sufficiency
Draft Public Hearing Resolution



2117 Averette Road

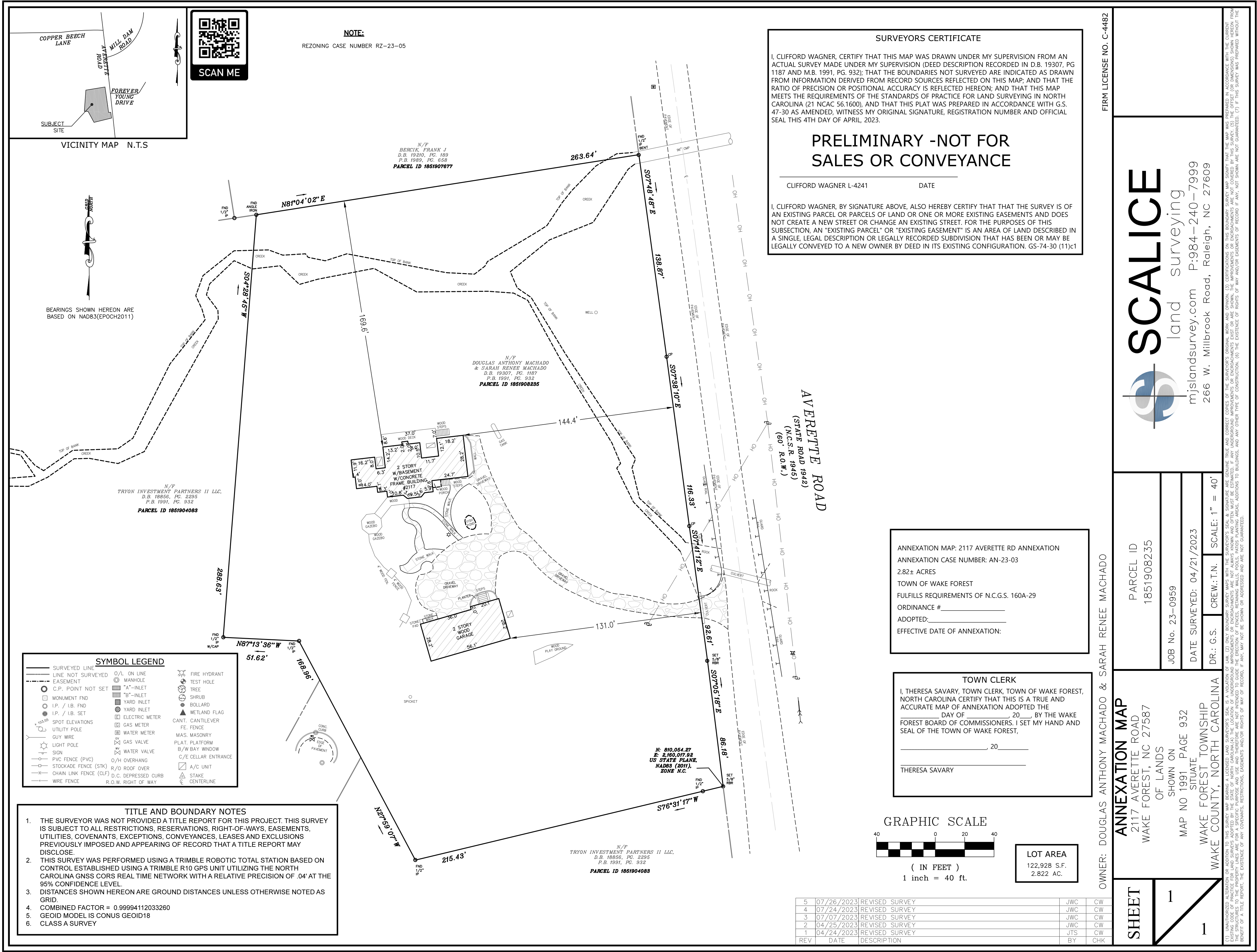
Schedule A

All that tract or parcel of land situate in the Township of Wake Forest, County of Wake, and State of North Carolina, bounded and described as follows:

Beginning at a 5/8" rebar set in the westerly right of way of Averette Road (60' Wide) having North Carolina State Plane NAD 83 (Epoch 2011) grid coordinates of North 810,054.27 and East 2,160,017.92 (us ft);

- 1) thence South 76°31'17" West for a distance of 215.43 feet to an ½" iron pipe found;
- 2) thence North 27°59'07" West for a distance of 168.96 feet to an ½" iron pipe found;
- 3) thence North 87°13'36" West for a distance of 51.62 feet to a ½" iron pipe found;
- 4) thence North 04°28'45" East for a distance of 288.63 feet to an angle iron found;
- 5) thence North 81°04'02" East for a distance of 263.64 feet to an ½" iron pipe found;
- 6) thence along the westerly right-of-way of Averette Road, South 07°48'48" East for a distance of 138.87 feet to a point;
- 7) thence continuing along the westerly right-of-way of Averette Road, South 07°38'10" East for a distance of 116.33 feet to a point;
- 8) thence continuing along the westerly right-of-way of Averette Road, South 07°41'12" East for a distance of 92.61 feet to a 5/8" rebar set;
- 9) thence continuing along the westerly right-of-way of Averette Road, South 07°05'18" East for a distance of 86.18 feet to the point and place of beginning,

said parcel having an area of 122,928 square feet, 2.822 acres, more or less





TOWN of WAKE FOREST

Planning Department
Wake Forest Town Hall – 3rd Floor
301 S. Brooks Street
Wake Forest, NC 27587
t 919.435.9510
f 919.435.9539
www.wakeforestnc.gov

CONTIGUOUS ANNEXATION PETITION APPLICATION

(Last updated: July 2013)

Submittal Date: 4/24/23

To the Board of Commissioners of the Town of Wake Forest:

I/we the undersigned owner(s) of real property respectfully request that the area described in the paragraph below and as shown in the attached survey map of the property be annexed into the Town of Wake Forest.

The area to be annexed is contiguous to the Town of Wake Forest corporate limits and the boundaries of such territory are as follows *(attach or insert below a metes & bounds description with a matching survey map):*

Attached

Note: If ownership is a corporation or partnership, please provide such name and the name and signature of the person authorized to sign on behalf of the corporation or partnership. If in joint ownership, please provide names and signatures of ALL owners.

<u>Sarah Machado</u>	<u>2117 Averette Rd.</u>	<u>[Signature]</u>	<u>4/24/23</u>
Name	Address	Signature	Date
<u>Doug Machado</u>	<u>2117 Averette Rd.</u>	<u>[Signature]</u>	<u>4/24/23</u>
Name	Address	Signature	Date
_____	_____	_____	_____
Name	Address	Signature	Date
_____	_____	_____	_____
Name	Address	Signature	Date

For additional information or assistance, please call the Planning Department at (919) 435-9510.

CERTIFICATE OF SUFFICIENCY

To the Board of Commissioners of the Town of Wake Forest, North Carolina:

I, Theresa Savary, Town Clerk, do hereby certify that I have investigated the petition attached hereto and have found as a fact that said petition is signed by all owners of real property lying the area described therein, in accordance with N.C.G.S 160A-31.

In witness whereof, I have hereto set my hand and affixed the seal of the Town of Wake Forest, this the 19th day of September, 2023.

Town Clerk

(SEAL)

RESOLUTION 2023-

RESOLUTION FIXING DATE OF PUBLIC HEARING ON QUESTION OF
ANNEXATION PURSUANT TO N.C.G.S. 160A-31, AS AMENDED
(by Douglas and Sarah Machado for property associated with the rezoning request RZ-
23-03, located at 2117 Averette Road being Wake County PINs 1851-90-8235 being
approximately 2.822 acres.)

WHEREAS, a petition requesting the annexation of the area described herein has been received; and

WHEREAS, the Board of Commissioners has by said resolution directed the Town Clerk to investigate the sufficiency of said petition; and

WHEREAS, certification by the Town Clerk as to the sufficiency of said petition has been made;

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Town of Wake Forest:

Section 1. That a public hearing on the question of annexation of the contiguous area described herein will be held at the Wake Forest Town Hall at 6:00 p.m. on the 17th day of October, 2023.

Section 2. The area proposed for annexation is described as follows:

(See Attachment A - Legal Description and Attachment B - Annexation Map)

Section 3. Notice of said public hearing shall be published once in the News and Observer, a newspaper having general circulation in the Town of Wake Forest, at least ten (10) days prior to the day of said public hearing.

Adopted and effective this the 19th day of September 2023.

Vivian A. Jones

Mayor

ATTEST:

APPROVED AS TO FORM:

Theresa Savary
Town Clerk

Hassan Kingsberry
Town Attorney



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-218-

Submitted by: Ella Dowtin

Submitting Department: Planning

Meeting Date: September 19, 2023

SUBJECT

Consideration of Appointment of Candidates for the Planning Board

Recommendation:

Item Summary:

ATTACHMENTS

- [PB Candidates Cover letter_1.pdf](#)
- [PB Applicants -Regular Seat.pdf](#)
- [PB APPLICANT - ETJ.pdf](#)

Wake Forest Planning Board Applicants

Planning Board – 1 Regular Seat and 1 ETJ

All Candidates:

Candidate	Town Limits
James F. Barber	Yes
Matt Davis	Yes
Joshua Epperson	Yes
Daniel Gardiner	Yes
Jennifer Haley	Yes
Kevin Haynes	Yes
Benny A. Jenkins	Yes
Kevin King	Yes
Jarrett Lane	Yes
John Mann	Yes
Phillip Martin	Yes
Shipman Northcutt	Yes
Sarah Mabraten	Yes
Veronica Roanhouse	Yes
Elaine Sheppard	Yes
Anna L. Shope	Yes
Anthony Skubic	Yes
Jay K. Tilley	Yes
Adam Redler	ETJ

Profile

Jarrett Lane

First Name Middle Initial Last Name

1024 Shasta Daisy Drive

Street Address Suite or Apt

Wake Forest NC 27587

City State Postal Code

jmlane3@gmail.com

Email Address

Home: (386) 873-8073

Primary Phone Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Entrepreneur & Business
Development Executive

Occupation

Do you live within the town's limits or ETJ?

☒ Yes ☐ No

Length of residency in Wake County

~1 year

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

I have experience as a public policy professional and as a business executive, enabling me to understand the importance of government and industry coming together to solve hard problems. For example, I launched and led new business units within Amazon, including the unit responsible for distributing free COVID-19 tests throughout the State of North Carolina as part of the Say Yes Covid Test! and Project ACT programs. I was directly responsible for contractual negotiations, operational planning, and cross-functional coordination required to ensure a successful launch and subsequent scaling of the program. I led a small, fast-moving team to launch the program, which gave me an appreciation for how to truly accomplish "more with less" and think creatively about how to use limited resources to take on enormous challenges. I am also experienced at navigating complex political dynamics and working to find common ground among groups with competing priorities. For example, I previously served as Chief of Staff on a research panel stood up by the U.S. Congress to help reform the U.S. military's acquisition system. Serving in that role required me to quickly learn how to balance the interests of legacy stakeholders with the need to modernize how business is done. I suspect there are many parallels to the experiences I describe above to the roles and responsibilities of the Planning Board. The Board has the critical job of helping usher development of this community in a manner that (1) reflects the values of longstanding residents and businesses, and (2) promotes sustainable, healthy development.

Question applies to multiple boards

[Jarrett Lane Resume April 2023 Generic v2.docx](#)

Upload Resume

Question applies to multiple boards

[Jarrett Lane Personal Statement Wake Forest Planning Board.docx](#)

Upload a Personal Statement (no more than 100 words)
outlining why you wish to serve of the board(s) or
council you indicated

List any hobbies

Gardening & Landscaping Fishing Reading -- Biographies & Non-Fiction Jogging Grilling

Question applies to Planning Board,Board of Adjustment

I participated in the following:

☒ Neither

Ethics Guidelines for Town Advisory Boards and Councils

Please Agree with the Following Statement

If appointed, I pledge to comply with the following ethics guidelines for advisory boards and commissions as adopted by the Wake Forest Board of Commissioners

☒ I Agree

Members of advisory boards and councils shall not discuss, advocate or vote on any matter in which they have a conflict of interest or an interest which reasonably might appear to be in conflict with the concept of fairness in dealing with public business. A conflict of interest or a potential conflict occurs if a member has a separate, private or monetary interest, either direct or indirect, in any issue or transaction under consideration. Any member who violates this provision may be subject to removal from the board or council.

If the advisory board or council member believes he/she has a conflict of interest then that member should ask the advisory board or commission to be recused from voting. The advisory board or council should then vote on the question on whether or not to excuse the member making the request. In cases where the individual member or the advisory board or council establishes a conflict of interest, then the advisory board or council member shall remove themselves from the voting area.

Any advisory board or council member may seek counsel of the Town Attorney on questions regarding the interpretation of these ethics guidelines or other conflict of interest matters. The interpretation may include a recommendation on whether or not the advisory board or council member should excuse himself/herself from voting. The advisory board or council member may request that the Town Attorney respond in writing.

Prior to being appointed to an advisory board/council, it is recommended that you attend a meeting of the advisory board/council in which you have an interest. This helps each applicant to be more aware of the work of the advisory board/council. If you have attended a meeting of an advisory board/council, please indicate the date:

Question applies to Planning Board, Historic Preservation Commission, Board of Adjustment

Please Agree with the Following Statement

Per NCGS 160C-109, members of appointed boards shall not vote on any advisory or legislative decision regarding a development regulation adopted where the outcome of the matter being considered is reasonably likely to have a direct, substantial, and readily identifiable financial impact on the member. An appointed board member shall not vote on any zoning amendment if the landowner of the property subject to a rezoning petition or the applicant for a text amendment is a person with whom the member has a close familial, business, or other associational relationship. A member of any board exercising quasi-judicial functions shall not participate in or vote on any quasi-judicial matter in a manner that would violate affected persons' constitutional rights to an impartial decision maker. Impermissible violations of due process include, but are not limited to, a member having a fixed opinion prior to hearing the matter that is not susceptible to change, undisclosed ex parte communications, a close familial, business, or other associational relationship with an affected person, or a financial interest in the outcome of the matter. A "close familial relationship" means a spouse, parent, child, brother, sister, grandparent, or grandchild. The term includes the step, half, and in-law relationships.

☒ I Agree

Please Agree with the Following Statement

Code of Conduct: When participating in a meeting or conducting Town business (whether in person, via email, or other communication method), board and commission members shall conduct themselves in an ethical and professional manner. Any board or commission member who engages in inflammatory, hostile or threatening language or behavior toward others, including but not limited to elected officials, staff or another board or commission member, will be removed from the meeting. Any member who engages in the aforementioned behavior is also subject to dismissal from the Board. I understand that that board and commission appointments serve at the pleasure of Board of Commissioners and may be removed from an appointed board or commission at the discretion of Board of Commissioners. Meeting Preparedness to successfully prepare for a meeting, then you will be provided agenda materials in advance. An unprepared board or commission member reflects poorly on the Town of Wake Forest as well as fellow board or commission members since questions asked are often found in the staff report. Any member who continually comes unprepared to meetings is subject to dismissal from the Board. Dress Code Board members are expected to be well groomed, cleaned, and dressed in business casual attire. Shorts, t-shirts, and jeans are not permitted. If a Planning Board member is dressed or groomed inappropriately for a meeting, work session, or a Comprehensive Plan workshop, they will be prevented from participating and counted as absent

☒ I Agree

Have you attended a meeting for the board in which you are applying?

☐ Yes ☒ No

If so, what date did you attend a meeting?

Please Agree with the Following Statement

I understand this application, including any information provided therein, may be considered a public record and as such portions may be subject to release under North Carolina General Statute Chapter 132, Public Records.

☒ I Agree

I understand that by agreeing to the above statement and typing my name below, that I am signing this application electronically.

Jarrett Lane

How did you learn about the town's advisory board openings?

☒ Town website

Jarrett Lane

Raleigh-Durham Area, North Carolina • 386.873.8073 • jmlane3@gmail.com

Strategy & Operations | Business Development | Partnerships

Cross-functional business leader and expert political strategist with direct experience building and managing new lines of business. Solves complex problems for organizations and customers by applying diverse experience ranging from business development to government relations across multiple industries including artificial intelligence, emerging technology, supply chain, healthcare, and defense. Excels at leading challenging organization-wide initiatives at the CEO level. Effective strategist with a proven ability to dive into the details and deliver results. Select achievements include:

- Designed, built, and led teams to launch 2 new Amazon business units in supply chain and healthcare, directly driving \$45M revenue within two years and the launch of Amazon's first FDA-authorized COVID test.
- Created AWS's policy portfolio on artificial intelligence and emerging technologies. Highlights include leading AWS through intense political and media scrutiny regarding facial recognition technology by redefining the company's policy positions, advising and influencing CEO-level decisions, building strategic partnerships with industry groups and think tanks, and securing cross-organizational alignment to institute guardrails on the sale of facial recognition to law enforcement.
- Cleared new pathways for the U.S. military to acquire emerging technologies and for small businesses to sell to the government by successfully advocating for federal policy and legislative changes.

PROFESSIONAL EXPERIENCE

GOVINI – Remote (Arlington, VA)
Vice President, Defense

2023-Present

- Lead business development, sales, and partnerships for large greenfield Department of Defense accounts, including Office of the Secretary of Defense, Defense Logistics Agency, Transportation Command, and Special Operations Command.

AMAZON SUPPLY CHAIN – Washington, DC
Principal, Business Development, Healthcare & Regulated Industries

2020-2023

- Envisioned and started a new business unit offering supply chain and logistics solutions to government agencies and highly regulated industries. Co-authored the proposal, gathered and analyzed market data, and produced financial models to secure resourcing from Amazon.com's CEO to launch the business.
- Delivered outsized sales results by developing a strategy, recruiting and leading a team of sales representatives and customer success managers, and building force-multiplying partnerships. Year-one results included exceeding year-one annual revenue goal by 20% and goal for new customers onboarded by 10%. My team's year-two results included beating our annual revenue goal by end of Q2 and driving 250% of our annual revenue goal by end-of-year.
- Defined strategic goals and KPIs to evaluate the business's health, growth, and sales pipeline. Led an initiative across sales, business operations, and data analytics teams to establish mechanisms, SOPs, and Salesforce reporting to enable audits of our business's progress and barriers.
- Led complex negotiations with customers and partners. Collaborated with finance, legal, and operations to close strategic deals and make high-judgment decisions on business opportunities.

AMAZON WEB SERVICES – Washington, DC
Business Development Manager, Emerging Space Technologies

2018-2020
2020

- Launched AWS's first space technology accelerator, which yielded 4 'all-in' commitments from leading space startups to AWS, 3 enterprise-level agreements, 2 migrations from competitor clouds, 60+ joint go-to-market opportunities, and \$340M+ raised by participating startups following the accelerator.
- Developed AWS's sales and partnership strategy for aerospace & satellite startups focused on automation, edge computing, networking, robotics, and quantum.

Chief of Staff & Regulatory Advisor, Science Team, COVID Testing Program

2020

- Led foundational work for releasing Amazon's first PCR test and creating a new business unit, Amazon Diagnostics. Liaised with legal counsel, scientists, and government relations to develop documentation and secure an EUA for Amazon's test.

- Identified promising research on COVID testing and engaged researchers globally to gather data and inform product development for sample collection tools, protocols, laboratory configuration, and test assay.

Public Policy Manager, Artificial Intelligence & Emerging Technologies

2018-2020

- Redefined AWS's position on facial recognition and sales to law enforcement. Gained alignment across sales, product, legal, public relations, and government relations executives to present a compelling business case to AWS's CEO and influence C-Suite leaders to institute a moratorium on facial recognition sales to police.
- Created and drove implementation of AWS's global artificial intelligence policy strategy, providing the global policy team clear direction and messaging guidance to enable consistent, proactive shaping of artificial intelligence regulations globally.
- Shaped policies to support AWS's customers and business objectives by leading engagements with the U.S. Congress, White House, and U.S. federal agencies regarding artificial intelligence, quantum computing, and high-performance compute.

DEPARTMENT OF DEFENSE, SECTION 809 PANEL – Rosslyn, VA Chief of Staff & Senior Researcher

2017-2018

- Developed and drove implementation of organization-wide mechanisms including project plans and content reviews to ensure cohesiveness in products and timely submission of deliverables to Congress.
- Successfully advocated for legislative changes to improve Defense Department acquisition of emerging tech. Briefed Congressional staff, guest-lectured in universities, presented publicly, and published opinion editorials to advocate for defense acquisition reform.

BOOZ ALLEN HAMILTON – Arlington, VA & Doha, Qatar Associate, General Management Consultant (2015-2017) Senior Consultant, General Management Consultant (2014-2015)

2014-2017

UNITED STATES SOUTHERN COMMAND – Doral, FL Political-Military Affairs Analyst, Strategy, Policy, and Plans Division

2010-2012

EDUCATION

DUKE UNIVERSITY – Durham, NC
Master of Public Policy

UNIVERSITY OF MIAMI – Coral Gables, FL
Bachelor of Arts, International Relations and Political Science

AWARDS & CERTIFICATIONS

- Active Top Secret/SCI Clearance
- Change Management Advanced Practitioner (via Georgetown University, McDonough School of Business)
- Department of Defense Joint Service Achievement Medal

ACTIVITIES & AFFILIATIONS

- Raleigh-Durham Startup Week, Track Captain 2023-Present
- Amazon Diversity Equity & Inclusion Team Member 2020-2022
- Center for Strategic & International Studies, Adjunct Fellow 2019-2021

SKILLS

- **Leadership & Management:** Strategic Planning, Operational Excellence, Performance Metrics, Organizational Design, Team-Building, Cultural Leadership, Problem-Solving
- **Industry Expertise:** Defense, Healthcare, Emerging Technologies, Supply Chain, Strategic Partnerships, Cloud, Government Relations

- **Functional:** Quantitative Analysis, Market Intelligence, Writing, Executive Communications, Strategic Communications, Public Relations, Policy Analysis, Advocacy

Profile

John

First Name

Mann

Middle Initial

Last Name

517 Brooks St

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

johnmann5319@gmail.com

Email Address

Mobile: (919) 757-5319

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Executive vice president of NA
operations

Occupation

Do you live within the town's limits or ETJ?☒ Yes ☐ No**Length of residency in Wake County**

27 years

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

HOA President at retreat at renaissance. He worked as a professional for the last 25 years in project management. Lived in the town of Wake Forest since 1998. Built several houses within this area.

Question applies to multiple boards

[John Mann CV Jan 2023.docx](#)

Upload Resume

Question applies to multiple boards

Upload a Personal Statement (no more than 100 words)
outlining why you wish to serve of the board(s) or
council you indicated

List any hobbies

HOA president, play with CASL for a long time , working out, bike riding with North Carolina cycle. On a classic 1969 car and part of car club in the Raleigh area. Hiking and cooking.

Question applies to Planning Board,Board of Adjustment

I participated in the following:

☒ Neither

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If the advisory board or council member believes he/she has a conflict of interest then that member should ask the advisory board or commission to be recused from voting. The advisory board or council should then vote on the question on whether or not to excuse the member making the request. In cases where the individual member or the advisory board or council establishes a conflict of interest, then the advisory board or council member shall remove themselves from the voting area.

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☒ I Agree

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☒ I Agree

Have you attended a meeting for the board in which you are applying?

☒ Yes ☐ No

If so, what date did you attend a meeting?

Several years ago, when the loading dock was being planned

Please Agree with the Following Statement

I understand this application, including any information provided therein, may be considered a public record and as such portions may be subject to release under North Carolina General Statute Chapter 132, Public Records.

☒ I Agree

I understand that by agreeing to the above statement and typing my name below, that I am signing this application electronically.

John Mann

How did you learn about the town's advisory board openings?

☒ E-News

Professional Experience

I have over 24 years of experience in clinical operations, project management, operations finance, and alliance management. During that time, I've managed business lines with up to 400 staff and client portfolios up to 300 million dollars in value. As an experienced professional I have certifications in project management, change management, and process engineering. Additionally, I started my career in software development and throughout my career I have been a company Business System Owner (BSO) in multiple organizations and as a result I have significant experience in technology management, implementations, and software development and implementation processes. After taking time for family matters and the holidays I am eager and ready to be a strong asset to a new organization.

Vault health*.

Feb 2022–Sep 2022

Vice President, Project Management Clinical Operations.

Responsible for the creation of a new decentralized clinical research organization and developing, supporting, and training the Vault Health organization on clinical research and decentralized trial operations. Establish all procedures and processes for a new clinical research organization utilizing decentralized site model. Established and led project management organization and responsible for writing, reviewing and providing input on 30+ SOPs, Work Instructions, and templates. Led all project management staff and providing operations leadership reporting to President of Clinical Research.

* Vault Health discontinued all clinical research operations as a board decision to focus on other business lines

ICON (Formerly PRA Heath Sciences)

Feb 2020 – Feb 2022

Vice President, Global Decentralized Clinical Trial Operations (DCT)

Responsible for the creation of new global DCT business unit and developing, supporting, and training the ICON organization on decentralized trial operations. Lead global initiative to process engineer all operational global SOPs, Work Instructions, and Templates to incorporate a DCT model into normal practices within organization. Review all global RFPs daily to evaluate protocols for DCT opportunities. Assist in building an operational strategy with project teams on any proposals and provide operational support and DCT expertise for any awarded or ongoing studies. Assist department head in tracking department metrics and providing updates to senior management.

ICON (Formerly PRA Heath Sciences)

Nov 2012 – Jan 2020

Vice President Project Management–Emerging Biotech/Rare Disease

Executive Director 2012 – 2015, Responsible for multiple levels of project management staff including PMs, PD's, and (Sr and Executive) Directors of Project Delivery (DPDs) reporting directly to the head of Project Management for the Americas. Managed and supervised up to 350+ employees with 9 direct reports while simultaneously managing a portfolio of 65+ global projects and programs being executed in all regions of the world with sponsor located in the Americas, Europe, and Asia Pacific regions. Line management for staff located in North, South, and Central America and responsibilities include management of performance and training needs, personnel evaluations and development, promotions, salary, and annual performance reviews, hiring forecasting against department PnL growth, turnover, career management. Global Project Management representative as Business System Owner (BSO) for 4 IT systems.

Perform duties as a Senior Project Management global representative within PRA/ICON. Duties included leading a corporate level initiative to develop a standard project management methodology/process for running projects within PRA/ICON, interface with other company organization/departments as a project management expert on multiple company initiatives and process improvement projects. Example projects include (but not limited to); a corporate project management reporting dashboard, standardization of project management metrics, a recruitment process for interviewing project management employees, development of corporate level risk management templates and process, bid defense standardization, an end-to-end timeline and critical path project management system, Project and site portals, and a global subject recruitment model.

Responsible for the oversight, management, and the operational execution of assigned projects and portfolios as an executive global project reviewer. This includes providing direction, motivation, and leadership to project teams, ensuring studies are maintaining GCP and regulatory compliance, serve as a senior representative for both internal and external departments, affiliates, and steering committees, assist in the development of project risk management and mitigation strategies, oversee timelines and resource management, and ensure that project teams implement best practices and lessons learned across portfolios which includes up to 75 projects.

Syneos (Formerly INC Research)

Jul 2007 – Nov 2012

Senior / Exec Director of Global Project Management, Cardiovascular, Endocrinology, and Rare Disease

Responsible for developing new business units within INC Research. As Senior Director was responsible for developing the General Medicine business unit following the acquisition of Advanced Biologics. After significant growth, the business lines were split into more dedicated business lines and took ownership of the CV, Immunology, and Rare Disease business unit. As an Executive Director and upon the acquisition of Kendle Research moved to grow a new combined business unit in Rare Disease, Cardiovascular and Metabolic. During these leadership positions, responsibilities included managing and supervised department PM and Clinical operations staff consisting of up to 50 global employees (NA, SA, EU) with eight direct reports (Sr. Directors, Directors, Clinical Team Leads, CRAs, and Project Managers) while simultaneously managing a portfolio of projects and programs. Developed multiple business units from the ground up including Rare Disease, Cardiovascular, and the General Medicine business unit.

CRO acquisition responsibilities - Directly involved with leading, onboarding, and transitioning the Advanced Biologic CRO staff and projects into INC Research's culture, structure, processes, and procedures. Additionally responsible for the primary leadership role in transitioning all projects into the assigned INC Research therapeutic areas following the MDS Pharma acquisition. For both transition roles, evaluated all projects for the organization in the areas of risk, finance, scope, performance, and quality.

Instructed business unit and company resources on project management methodologies including but not limited to; project scope and finance management, resource, risk, time, and quality management. Interfaced within the INC organization as a Project Management expert on many company initiatives including but not limited to; Quality Finish™, MS Project, global Project Resource Management (PRM), international revenue recognition tool, NA recruitment process for new employees, creating the risk management templates

and process for PM staff, and developing bid defense standardization and optimization initiatives. Responsibilities also included oversight and management of all operational projects within department.

Quintiles

2003 - July 2007

Associate Director of Project Management, Cardiovascular, Quintiles Inc.

Duties included leading large global clinical trial projects (up to 100M in Labor) and project teams (domestic and international) with responsibilities for coordinating the efforts of project team members for contracted full service clinical trial services. Line Management responsibilities include managing up to six (6) direct reports ranging from Senior Project Managers to Project Coordinators

Quintiles

2001- 2003

Associate Director of Project Management, IVR Services, Quintiles Inc.

Quintiles

1998 – 2001

Project Manager / Sr Project Manager, IVR Services, Quintiles Inc.

Triangle Labs, Inc

1998 – 1998

Pharmaceutical Team Leader

Lab supervisor over LCMS/Mass Spec instrumentation laboratory

North Carolina State University

1996 – 1998

Graduate Research Assistant

Conduct graduate research under grant

University of South Carolina – Coastal Carolina

1994 – 1996

Adjunct Professor of Chemistry

Instruct general chemistry classes and laboratories

US Army

1987 - 2002

Infantry soldier - enlisted and officer

Fifteen years in the active and National Guard components of the US Army. Rank ranged from enlisted (staff sergeant) through 1st lieutenant. Attended multiple leadership schools and held positions including, but not limited to, squad/section leader, platoon leader, and Company Executive Officer.

Therapeutic Summary

- 20+ years in project management and clinical research with 25+ years management and leadership experience
- Worked on Clinical studies in over 50 countries conducting Phase I through IV studies (primarily I-III, non EDS) including all service areas
- 13+ years of pediatric and rare disease experience in global studies
- Therapeutic experience;
 - o **Women's health** – Osteoporosis, Oral Contraceptive, Hormone Replacement, Breast cancer, Endometrial safety, Female Sexual Dysfunction, Vasomotor
 - o **Endocrine/Metabolic/NeuroMuscular** - Diabetes– Type I and II, MPS-IV (Morquio syndrome), LAL Deficiency, Precocious Puberty, GVHD, Pompe's Disease, Spinal Muscular Atrophy (SMA), Phenylketonuria (PKU), Limm Girdle MD,
 - o **Immunology** – Osteoarthritis, Rheumatoid Arthritis, Ménière's disease
 - o **Dermatology** – Head Lice, Acne, Psoriasis, Epidermolysis Bullosa

- o **Cardiovascular** – Pulmonary Arterial Hypertension (PAH), Hypertension, Coronary Artery Disease, Cardiac Imaging, Fibrin Sealant
- o **Respiratory** – Asthma, seasonal allergy
- o **GI/ Inflammatory** – eosinophilic esophagitis, Ulcerative Colitis, Crohns Disease
- o **Infectious Disease** – HIV, CDAD, Traveler's Diarrhea, Flu, complicated intraabdominal infection
- o **CNS** - Post herpetic neuralgia, Bi-Polar Disorder, Schizophrenia, Stroke
- o **Oncology** – Acute Myelogenous Leukemia (AML), Pancreatic Cancer, Breast Cancer, Myelofibrosis, NHL, Diff B Cell, Follicular Lymphoma, CLL

Publications

The Effects of Irrigation and Fertilization on the Wood Quality of Loblolly Pine (*Pinus taeda* L.), NC State University 1998

Education and Certifications

- B.S. Biology, minor chemistry, University of South Carolina, Conway, SC.-1994
- M.S. Forest Biology, North Carolina State University, Raleigh, N.C. - 1998
- Project Management Professional (PMP) Certification, PMI institute
- Change Management Certification, PROSCI
- Six Sigma Green Belt certification, NC State University

Profile

Jay

First Name

K

Middle Initial

Tilley

Last Name

536 Dimock Way

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

maddadt@gmail.com

Email Address

Mobile: (919) 690-2822

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Retired

Occupation

Do you live within the town's limits or ETJ?☒ Yes ☐ No**Length of residency in Wake County**

8 years

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

NC Department of Commerce, Economic Development. Career.

Question applies to multiple boards

[Jay Tilley Resume.pdf](#)

Upload Resume

Question applies to multiple boards

Upload a Personal Statement (no more than 100 words)
outlining why you wish to serve of the board(s) or
council you indicated**List any hobbies**

Golf Pickle Ball Cooking (grilling mostly)

I participated in the following:

☒ Neither

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☒ I Agree

Have you attended a meeting for the board in which you are applying?

☐ Yes ☒ No

If so, what date did you attend a meeting?

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☒ I Agree

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Jay Tilley

How did you learn about the town's advisory board openings?

☒ Town website

Jay Tilley

536 Dimock Way
Wake Forest, NC 27587
C 919-690-2822
jayktilley@gmail.com

PROFILE

A career of professional business and economic development experience with a thorough knowledge of project management. Ability to provide planning, research, insight and mature professional presentation.

SKILLS

The ability to create and establish relationships to achieve common goals. I am genuine and relaxed, but focused on success. I understand concerns and know how to help bring resolution. I am a very creative thinker.

EXPERIENCE

2008-2012: Granville Economic Development Commission, Executive Director

Lead and managed all economic development and business development activities in Granville County and its five municipalities.

1994-2008; North Carolina Department of Commerce, Senior Developer

Served at the senior level as general developer on Business & Industry Staff, managing a wide range of economic development projects statewide. During the last eight years with the Department of Commerce, I served as project manager or team member on over sixty economic development projects that produced more than 2500 new jobs and over \$1,200,000,000 in new investment in North Carolina.

1991-1994; Johnston County Economic Development Commission, (EDC) Plant Coordinator

Assisted the Director in all ED activities, including community relations and rural development.

1978-1991; Employment Security Commission of North Carolina (ESC) Manager II

Last position held: Local Office Manager for the Smithfield ESC Office.

EDUCATION

Northern Durham High, Diploma, 1971

UNC-Wilmington, BA Degree English Ed., 1975

Public Managers Program, Certificate, State Personnel/NCSU 1988

SUMMARY:

As an 'older worker,' I have been searching for a good fit to consider coming out of retirement. I no longer want to be a boss, but would welcome the opportunity to provide value added service for a period of 3-5 years, perhaps longer if still having fun.

Profile

Phillip J Martin
First Name Middle Initial Last Name

243 Capellan St. Suite or Apt
Street Address

Wake Forest NC 27857
City State Postal Code

thephillipmartin@gmail.com
Email Address

Home: (919) 601-1135
Primary Phone Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Real Estate Development
Manager/Urban Planner
Occupation

Do you live within the town's limits or ETJ?

☒ Yes ☐ No

Length of residency in Wake County

10 years

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

Member of Urban Land Institute on the Transportation and Land Use Board, Former member of NC Association of Planners and North Carolina Association of Zoning Officials.

Question applies to multiple boards

[PJM_Resume_2021.pdf](#)
Upload Resume

Question applies to multiple boards

[Personal_Statement.docx](#)
Upload a Personal Statement (no more than 100 words) outlining why you wish to serve of the board(s) or council you indicated

List any hobbies

Fishing, golf, spending time with family, sporting events and community events

Question applies to Planning Board, Board of Adjustment

I participated in the following:

☒ Neither

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☒ I Agree

Have you attended a meeting for the board in which you are applying?

☒ Yes ☐ No

If so, what date did you attend a meeting?

06/14/22

Please Agree with the Following Statement

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☒ I Agree

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Phillip Martin

How did you learn about the town's advisory board openings?

☒ Our Town Newsletter

Phillip J. Martin

Raleigh, NC 27614 | (919) 601-1135

thephillipjmartin@gmail.com | www.linkedin.com/in/phillip-j-martin/

Results-driven professional with extensive experience in real estate, project management, stakeholder engagement, economic development, renewable energy, land entitlements, land use planning, zoning, and due diligence activities. Self-motivated, strategic thinker with proven execution in creating value within organizations based on technical expertise and resourcefulness. Inspires teammates and stakeholders to reach common goals through the ability to communicate effectively, build partnerships, and demonstrate passion.

KEY SKILLS

- Project Management
- Stakeholder Engagement
- Budgeting/Forecasting
- Strategic Planning
- Land Planning and Zoning
- Public Speaking
- Regulatory Compliance
- Economic Development
- Team Motivation

TECHNICAL SKILLS

- Microsoft Office Suite
- Sketch Up
- ArcGIS

EMPLOMENT

HHHunt, Raleigh NC
Real Estate Development Manager

2021-Present

Primary role is to manage developments through the Southeast by overseeing the successful acquisition of all necessary zoning entitlements and agency permits.

Ecoplexus, Durham, NC
Director of Community Engagement

2019 – 2021

Currently, manage a team of three employees dedicated to improving economically stronger, smarter, and cleaner communities through partnerships and strategic investments in solar energy facilities. Primary role is to manage utility-scale solar developments through the United States by overseeing the successful acquisition of all necessary zoning entitlements and agency permits.

- Oversee community engagement activities to educate stakeholders about clean energy.
- Serve as a liaison to industry associations with a focus on the development of clean energy policies, business development, and political advocacy.
- Plan, promote, and execute partner events, such as ground-breaking and ribbon cutting events, to create a sense of belonging among partners and the community.
- Primary point of contact for all media inquiries and preparation of all public relation pieces.

Cypress Creek Renewables, Durham, NC

2016 – 2019

Senior Community and Economic Development Manager

Senior community engagement manager primarily engaged in managing community relations efforts to effectively support and promote the development of utility-scale solar projects by engaging, facilitating, and garnering the support of stakeholders throughout the Southeastern United States. Nurtured future employees by independently developing a summer intern engagement program.

- Lead a team of 10 community engagement managers throughout the country.
- Responsible for budgeting and developing strategic partnerships for the organization.
- Oversaw a 3-gigawatt (GW) portfolio through land use and zoning entitlements, and permitting approvals.
- Industry group representative advocating for political and public policy for clean energy.
- Established a strong network of regional leaders to promote the firm's community engagement models while developing key processes and communications that facilitate program development, outreach, and execution.
- Brought partners together through public events to create ownership in projects.
- Performed necessary entitlement due diligence for prospective and acquired projects.
- Engaged experts needed to successfully maneuver the entitlement process.
- Routinely prepared and managed contracts and scope, scheduling, and payments.

Cary Keisler, Inc., Cary, NC
Facilities and Construction Manager

2014 – 2015

Served as Project Manager for all repairs, new construction and capital improvements for a North Carolina restaurant chain.

- Negotiated and managed contracts, budgets, and payments to contractors.
- Maintained relationships with all general managers and contractors.
- Coordinated plan approvals, entitlements, and permitting to meet project schedules.
- Attended and participated in construction and due diligence meetings with municipalities and other stakeholders regarding site selection and project feasibility.

City of Raleigh, Raleigh, NC
Planner/Zoning Inspector

2013 – 2014

Enforced all City Zoning Ordinances and Unified Development Ordinances through reviews and inspections. Served as technical expert before appointed and elected boards.

- Oversaw all zoning inspections, review of site plans, assessment of field work done by others, and the issuance of zoning compliance and development permits.
- Streamlined all permitting processes and facilitated due diligence meetings.

Town of Williamston, Williamston, NC
Planning, Zoning, Subdivision, and Watershed Protection Administrator

2008 – 2013

Supervised the Town's two-person Code Enforcement Department. Provided technical expertise to staff and elected/appointed boards. Performed grant writing with an emphasis toward economic development opportunities.

- Collaborated with Martin County Economic Development Council for economic development activities such as site selection, market research, and job creation.
- Performed grant writing for a wide range of third-party funding opportunities.
- Facilitated project advisory committee meetings, public meetings, and design charettes.
- Managed daily operations of Williamston Downtown Incorporated, a 501(c)(3) Non-Profit Organization focusing on downtown revitalization and grant-making for businesses.
- Administered the Town's GIS data layers for hydrology, topography and planning.

RE/MAX Preferred Realty, Greenville, NC
Prudential Prime Properties
Licensed Broker/Client Care Specialist

2006 – 2008

Real estate professional with a strong emphasis on client service.

- Assisted clients with buying and selling residential and commercial real estate.
- Collaborated with builders on market analysis, site selection, and site acquisition.
- Oversaw advertising and marketing of company real estate listing, including the preparation of advertisements via various software programs and communication with publications, television, and local real estate magazines.
- Maintained property listing database, prepared brochures for clients considering relations to the area and answered all public inquiries.

EDUCATION

East Carolina University, Greenville, NC
Bachelor of Science in Urban and Regional Planning
Minor in Security Studies and Certificate in urban Design

JY Monk Real Estate School, Greenville, NC
Licensed North Carolina real Estate Broker

As a member of the Planning Board, it is an opportunity to give back to my community. I will work to ensure that Board continues to play a central role in decisions about land use. I bring an energetic perspective of an active, engaged professional to the board. The challenges to Wake Forest come largely from the world around us—changes to demographics, the economics of retail, the cost of public infrastructure, massive development in towns around us that impact our residents without benefiting them. I want to make our town an even better place to live, work and play.

Profile

Kevin

First Name

Haynes

Last Name

1436 Reservoir View Ln

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

kch.haynes@gmail.com

Email Address

Home: (919) 455-8074

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Project Executive, EC Build

(Commercial Construction

Company)

Occupation

Do you live within the town's limits or ETJ?

☒ Yes ☐ No

Length of residency in Wake County

3 years

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

After graduating from Duke in 2003, I lived in the mill on North Main Street while completing my two year commitment for Teach for America at Cedar Creek Middle School. We moved away and then back to Wake Forest in 2020. I have seen the town evolve and grow tremendously during that time. Since completing my teaching assignment, I spent 15 years as a management consultant assisting design and construction companies with strategy. My primary assignment included assessing the current status of the business and planning for its next 3-5 years. More recently I have assisted two construction companies with growing their businesses, one based in Atlanta and one based in DFW (local office in Raleigh). While opening the Raleigh office I spent a year working out of the Loading Dock in Wake Forest, and this intensified my interest in Downtown and its growth trajectory. I am now in talks with several stakeholders regarding the opening of a restaurant in the area. I have a passion for planning and development, specifically historic revitalization. While traveling across the state for baseball with my three sons, I have seen numerous towns do it the "right" way and others that have struggled. I would enjoy using this experience in a more formal/structured fashion. I am a promoter of Wake Forest and believe that there are a lot of exciting things on the horizon for the community and its inhabitants. I would enjoy being a part of assisting in this effort. (This is also my personal statement).

Question applies to multiple boards

[Kevin Haynes Resume 03.2023_2 .pdf](#)

Upload Resume

Question applies to multiple boards

Upload a Personal Statement (no more than 100 words)
outlining why you wish to serve of the board(s) or
council you indicated

List any hobbies

Running - Run 200+ miles per month Baseball - have coached all three of my sons, most recently at the Factory

Question applies to Planning Board,Board of Adjustment

I participated in the following:

☒ Neither

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Question applies to Planning Board, Historic Preservation Commission, Board of Adjustment

Please Agree with the Following Statement

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☒ I Agree

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☒ I Agree

Have you attended a meeting for the board in which you are applying?

☐ Yes ☒ No

If so, what date did you attend a meeting?

Please Agree with the Following Statement

I understand this application, including any information provided therein, may be considered a public record and as such portions may be subject to release under North Carolina General Statute Chapter 132, Public Records.

☒ I Agree

I understand that by agreeing to the above statement and typing my name below, that I am signing this application electronically.

Kevin Haynes

How did you learn about the town's advisory board openings?

☒ Town website

KEVIN HAYNES

GOAL

To assist an organization reach its potential for exceptional performance, long-term business growth and success. To drive toward championing a high quality of work and trusting relationships with clients and team members while maintaining a strong personal standard of integrity.

CORE & ROLE-BASED COMPETENCIES

- **Relationship Building**- 18 years of industry relationships and the development of trust and respect with a large network of architects, engineers, contractors and project owners.
- **Business Acumen**- have a thorough understanding of how AEC businesses work; very familiar with the various financial and organizational models commonly seen within the industry.
- **Perspective**- have built significant understanding of how decisions, actions and stakeholders influence and interact with one another, look toward the widest possible perspective of an issue, knowledgeable about all the encompassing facets of an organization's working.
- **Strategic Agility**- able to succeed by helping others arrive at desired outcomes, able to see what's ahead and can forecast future consequences and trends accurately.
- **Sell, Lead & Manage Projects**- able to drive an engagement from start to finish, can assemble resources to carry project through to completion and clearly assign responsibility for tasks and decisions according to the strengths of the team members.
- **Mental Flexibility**- able to pivot in a course of thought/action according to evolving needs of a situation, can see many ways to address a client need based on the unique context.

ACADEMIC HISTORY

DUKE UNIVERSITY

Bachelor of Science in Sociology, 1999-2003

- Certificate of Markets and Management.
- Cum Laude Graduate, Graduate with distinction for honors thesis on organizational culture and performance.

CAREER HISTORY

PROJECT EXECUTIVE

EC Build 2022-Present

- Oversee all day-to-day construction operations including staffing assignments, project planning and development, cost and schedule analysis, and owner and subcontractor communications and interface.
- Promotes company's core values and communicates, oversees and reports the safety, quality and financial goals and objectives established by the President and Board of Directors.
- Responsible for creating and maintaining client relations, establishing project leads and preparing project pursuit submissions.

VICE PRESIDENT - CLIENT ACQUISITION

Cloud Construction & Facilities Management, 2020-2022

- Lead all "Get Work" activities (business development, marketing and pre-construction) and initiatives specific to the company's construction and facilities maintenance services.
- Develop and execute a comprehensive business development and implementation strategy specific to the company's growth objectives.
- Create and maintain actual and forecasted financial models for the company.
- Manage routine tracking mechanisms with respect to prospective and actual business activity.
- Oversee recruiting, onboarding, training and development of team members.
- Work collaboratively with department heads and team members, including operations, to execute day to day functions of the company.

SENIOR CONSULTANT

FMI Corporation, 2006-2020

- Generated leads and built deep relationships with key contacts within the industry; maintained client relationships as a trusted advisor and extended our work opportunities to meet their ongoing needs.
- Gained insight of owner procurement practices and preferences through personal interviews with 1000+ stakeholders across all construction segments.
- Managed the full project engagement to meet high standards and assumed ultimate accountability for quality and client expectations.
- Successful completion, with positive customer feedback, of 500+ engagements, totaling approximately \$9M in consulting revenue.
- Became a sought-after source of expertise for industry publications and presentations (SMPS, ABC, CMAA, AFSA, ASCE).

Profile

Daniel

First Name

S

Middle Initial

Gardiner

Last Name

508 RAYBURN AVE

Street Address

Suite or Apt

WAKE FOREST

City

NC

State

27587

Postal Code

gardiner_ds@yahoo.com

Email Address

Home: (919) 724-5918

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Vice President

Occupation

Do you live within the town's limits or ETJ?☒ Yes ☐ No**Length of residency in Wake County**

15

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

As a resident of Wake Forest for 15 years on Rayburn Ave, I have consistently been a cheerleader for Wake Forest. I have admired what the town has done over the years and I believe I have also have experience and skills that will compliment the Boards and Commissions. Within Wake Forest I have been a Cub Scout leader for Pack 5 and more recently have been a coach for the Wake Forest Recreational baseball program. In my career, I have provided leadership to various technology companies in the greater Raleigh area.

Question applies to multiple boards

[Dan_Gardiner_Resume_June_2023.docx](#)

Upload Resume

Question applies to multiple boards

[Wake_Forest_Statement.docx](#)

Upload a Personal Statement (no more than 100 words)
outlining why you wish to serve of the board(s) or
council you indicated

List any hobbies

Jogging, Cycling, Woodworking, Hiking with our dog Olive, Baseball coaching, Gardening, Cooking.

Question applies to Planning Board, Board of Adjustment

I participated in the following:

☒ Neither

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☒ I Agree

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☒ I Agree

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Dan Gardiner

How did you learn about the town's advisory board openings?

☒ E-News

DAN GARDINER

P: (919) 724
5918

E: gardiner_ds@yahoo.co
m

LI: linkedin.com/in/danielgardin
er

PRODUCT DEVELOPMENT LEADER

Results driven professional with a record of delivering best in class products to growth markets including Scientific Instrumentation, Robotics, Automotive & Industrial Components, and Aerospace at both Start-Ups and Fortune 500 companies. A reputation of developing strong teams, empowering them, and consistently delivering exemplary returns.

CORE COMPETENCIES

Technology Development	Competitive Analysis
Commercialization	Operational Leadership
Team Building	Compliance
Intellectual Property	Robotics & Automation
Ideation Methodologies	Quality Systems
Change Management	Problem Solving
Workflow Solutions	Product Life Cycle

PROFESSIONAL EXPERIENCE

PROTOCHIPS, Morrisville, NC - Leader in *Scientific instruments for the electron microscopy market*

1/2017 Present - **Vice President Of Engineering** - Focused on growing our market by developing products including integrated electro-mechanical systems, software & MEMS consumables. In 2018 & 2019, we launched three next-gen products and revolutionary electron microscope software creating a great gap over our competition. Also responsible for managing our IP Portfolio, leading our Product introduction Process and Corporate Quality Initiatives.

9/2011 - 1/2017 **Director Of Engineering** - Through the start-up stage of Protochips I was given the mission to build an engineering group to transition early prototypes into high quality products. This included productizing the hardware, electronics & software for three product lines: Fusion, Poseidon and Atmosphere. Market acceptance led to rapid company growth, at which point I established other departments including Customer Service, Planning and Quality. While experiencing high manufacturing growth, I became Interim Director of Operations from 2016 to 2017 while still overseeing Engineering. Within this role I executed a global outsourcing strategy, institutionalized key processes and led our ERP implementation.

INSIGHT PRODUCT DEVELOPMENT, Raleigh, NC - *Design consultancy out of Chicago, IL. (closed NC office 9/2011)*

5/2011 - 9/2011 **Director Of Engineering** - In this position, I directed a group of multi-disciplined engineers focusing primarily on early stage product development for clients in a range of markets. During this time, my team worked closely with our market research experts and industrial designers to deliver results to our customers. In this environment, I learned effective ways to produce data driven market requirements via ideation, prototyping, and story boarding necessary to attain actionable market feedback.

PARATA SYSTEMS, Durham, NC - *Leading producer of pharmacy automation robotic systems*

11/2009 - 5/2011 **Director of Research & Development** - Upon successful launch of Parata Max® and Mini®, my team was re-chartered to develop technologies to break into new markets. One success was adapting the core technologies of the Parata Max to the needs of high volume mail order pharmacies,

DAN GARDINER - CONTINUED

4/2007 -
11/2009

displacing older technology. We also prototyped and validated numerous product advancements including a significantly quieter and cleaner robotic system.

Engineering Manager - Shortly after joining Parata, I was asked to take over the development activities of the next-gen pill dispensing modules. At this time, the design had major technical challenges and was behind schedule. By making adjustments to the team, aligning priorities, and clearly communicating progress across the organization, the team under my direction caught up with the other subsystems and met the Beta and Launch deadlines. The final commercial product met all requirements, and the "HPAC" cell is still the fastest and most accurate drug counting cell in the world. I also led Parata's Research Pharmacy operations, a team responsible for researching and influencing state and federal pharmacy regulations and determining drug cell settings.

HARGRAVES, Mooresville, NC - *Producer of pumps and solenoid valves. Acquired by Parker Hannifin in 2008*

3/2006 -
4/2007

Engineering Manager - Developed an engineering team responsible for expanding and improving a line of diaphragm pumps while launching a first generation solenoid valve in 2006. A major focus was bringing Hargraves to a higher level of engineering discipline by implementing project management structure, design controls, & problem solving methods. These were successfully deployed to remedy wide spread quality problems and establish safe launch plans for new products.

TEXAS INSTRUMENTS, Attleboro, MA - *Sensors division - purchased and named Sensata Technologies in 2006*

6/2003 -
3/2006

Design Supervisor - Led the development of TI's leading pressure sensor product line (MSG), supervising a team of 19 engineers & technicians responsible for expanding the technology to more vehicle models and systems. During this time we launched 17 new products resulting in a 3-fold revenue increase. I also facilitated a global cross-functional cost reduction think-tank team, and realized \$3M in yearly savings through design changes, process improvements and supplier development activities.

9/2000 -
6/2003

Design Engineer / Team Lead - Hired during a transfer of manufacturing to Mexico and Malaysia, my responsibilities were split between supporting the ongoing design activities and helping overcome significant quality problems during start-up at the Mexico plant. I successfully led the problem solving activities as well as the communication of recovery plans to the critical OEMS.

BE AEROSPACE, Miami, FL - *(now Rockwell Collins) is the leading supplier of private & commercial aircraft interiors*

1/1996 -
9/2000

Design Engineer / Team Lead
Designed and launched a variety of FAA approved seating products. While most acceptance testing was destructive, I established methods of using FEA to attain approvals of certain structures. Promoted after 2 years, I led a team of design engineers and drafters responsible for all executive aircraft seating. During this time I continued to contribute as a lead design engineer including the first fully programmable robotic seats into VIP aircraft.

DAN GARDINER - CONTINUED

EDUCATION & TRAINING

- B.S. Mechanical Engineering - UNIVERSITY OF MAINE
- Executive Business Coaching - SMART STATE LLC, 2015 - 2021
- Various Engineering, Management, Manufacturing & Quality Courses - 1996-Present

MEMBERSHIPS

- T.A.B. Advisory Board Member, 2015 to Present
- Member, Product Development Management Association, 2008-2011
- Member, NORTH CAROLINA TECHNOLOGY ASSOCIATION, 2007-2010

AWARDS & PUBLICATIONS

- Inventor on 22 issued patents and over a dozen pending patents
- Microscopy Innovation Award for Atmosphere™ Catalysis System - PROTOCHIPS, 2019
- R&D 100 Award Winner - Poseidon™ 500 Electrochemistry System - PROTOCHIPS, 2013
- Temperature Measurement by a Nanoscale Electron Probe Using Energy Gain and Loss Spectroscopy - APS PHYSICS, 2018
- EBSD Analysis of Materials Utilizing High Temperature System in FE-SEM - M&M, 2013

VOLUNTEER & OUTREACH

- Baseball Coach - Town of Wake Forest - 2021 to Present
- Cub Scouts Den Leader, BSA, 2017 to 2020
- Engineering Project Sponsor/Coordinator - UNC, 2006-2007
- Volunteer - UNITED WAY OF GREATER ATTLEBORO, 2001-2006

Dear Wake Forest Planning Board,

I am applying to this position is an effort to give back to the town I have lived in for the last 15 years. My wife Sarah and I have raised our children here and now that they are teenagers (13,15&18) I would like to offer my time and attention to our town in a fashion that can make a positive impact. Although my professional experience is in the private sector, perhaps my skills, experiences, volunteerism, and love of the Town of Wake Forest will serve the board to the best level possible.

Sincerely,

-Dan

Profile**James**

First Name

F

Middle Initial

Barber

Last Name

712 Holding Ridge Court

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

jfbarber60@gmail.com

Email Address

Mobile: (434) 960-4362

Primary Phone

Alternate Phone

Which Boards would you like to apply for?**Planning Board: Submitted****Retired**

Occupation

Do you live within the town's limits or ETJ?☐ Yes ☒ No**Length of residency in Wake County****9 years**

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

I am a retired fire marshal (from Virginia) and I am familiar with the plan review process. I am interested in being a positive influence and voice in our community.

Question applies to multiple boards

Upload Resume

Question applies to multiple boards

Upload a Personal Statement (no more than 100 words) outlining why you wish to serve of the board(s) or council you indicated

List any hobbies

Golf

Question applies to Planning Board, Board of Adjustment

I participated in the following:

☒ Citizen's Planning Academy

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☒ I Agree

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☒ I Agree

Have you attended a meeting for the board in which you are applying?

☐ Yes ☒ No

If so, what date did you attend a meeting?

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☒ I Agree

I understand that by agreeing to the above statement and typing my name below, that I am signing this application electronically.

James F. Barber

How did you learn about the town's advisory board openings?

☒ E-News

Profile

Kevin M King
First Name Middle Initial Last Name

2120 Latham Oaks Ave
Street Address Suite or Apt

Wake Forest NC 27587
City State Postal Code

zkevinking@gmail.com
Email Address

Mobile: (757) 630-8197
Primary Phone Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Product Management
Occupation

Do you live within the town's limits or ETJ?

☒ Yes ☐ No

Length of residency in Wake County

12 months

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

Education and Professional Affiliations: I graduated with a degree in Park, Recreation, Tourism, and Hospitality from Old Dominion University. This educational background has equipped me with a strong foundation in understanding the dynamics of the industry. As a board member of the ASID (American Society of Interior Designers) chapters in both DC and Baltimore, I have gained valuable insights into the design and hospitality sectors. This experience has enhanced my understanding of creating exceptional environments and providing memorable experiences for guests and residents. Additionally, as a board member of the NKBA (National Kitchen and Bath Association) chapters in Baltimore, DC, and Virginia, I have developed a deep understanding of kitchen and bath design, which aligns with the hospitality industry's demands for aesthetically pleasing and functional spaces.

Leadership and Community Involvement: Serving as a board member of the Currituck Club in Corolla, NC, I have actively contributed to the development and management of recreational facilities. This experience has given me insight into the needs and expectations of community members. My involvement in various board positions demonstrates my ability to collaborate effectively and make decisions that benefit the organization and its stakeholders. It also showcases my commitment to professional development and staying engaged with industry trends.

Diverse Professional Experience: With over seven years of experience in sales, economics, development, project management, and product management, I have developed a versatile skill set. This background enables me to approach challenges from multiple perspectives and contribute to different aspects of your organization. I have consistently demonstrated my ability to work well in teams, fostering a collaborative and supportive environment. Being a team player allows me to leverage the strengths of others while contributing my own expertise to achieve shared goals.

Continuous Learning and Value Addition: I am passionate about personal and professional growth, always seeking opportunities to learn and adapt to evolving trends and best practices in the industry. This drive ensures that I can bring fresh ideas and innovative solutions to your organization. My genuine enthusiasm for making Wake Forest the best place to live and play aligns perfectly with your vision. I am dedicated to actively engaging with the community, understanding their needs, and implementing strategies that enhance their experience.

Question applies to multiple boards

[Resume - 2023 .pdf](#)

Upload Resume

Question applies to multiple boards

[Personal Statment - WF - BoC .pdf](#)

Upload a Personal Statement (no more than 100 words) outlining why you wish to serve of the board(s) or council you indicated

List any hobbies

Reading, movies, listening to music, coffee drinker, foodie, making bread, walking, playing golf, playing basketball, gardening, and bird watching

Question applies to Planning Board,Board of Adjustment

I participated in the following:

☒ Neither

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Kevin King

How did you learn about the town's advisory board openings?

☒ Town website

Kevin King

Raleigh, NC

Phone: 757.630.8197 | Email: zkevinking@gmail.com

[LinkedIn](https://www.linkedin.com/in/zkevinking): [linkedin.com/in/zkevinking](https://www.linkedin.com/in/zkevinking) | [Portfolio](https://zkevinking.com): zkevinking.com

SUMMARY

Kevin is responsible for the development of the product and its entire lifecycle. From the vision, market research, ideation, engineering, testing, marketing, sales, and support. Kevin is an adaptable and innovative team leader with product owner experience, a proven record delivering results to generate business growth.

Background in manufacturing sales, with emphasis in construction. Kevin has the skills and knowledge to develop impactful, valued, and data-driven products. Effectively communicate with key stakeholders allowing collaboration finding the winning strategy.

TECHNICAL SKILLS

Product Principles and Mindset:

Whole product concept
Business Model Canvas
Value Proposition Canvas
Persona development.
Agile project management
Customer Segmentation

Communication Management:

Cross-Functional Facilitation
Communication Strategy
Presentation skills

Product Execution:

Roadmap development
Backlog management
Epic and user story creation
Feature prioritization
Wireframes and Prototyping
Sprint planning and execution
Objectives and Key Results (OKRs)
Key Performance Indicators (KPIs)
Optimization strategies

Data Analysis and Visualization:

Insight mining
Data Structures
Funnel and cohort analysis
Product Analytics Tools
Qualitative vs. Quantitative
Data SQL AB Testing

Applications: Jira, Confluence, Tableau, Miro, Salesforce, Calendly, Remo, Canva, Slack, Prezi, Google Analytics & Optimizely, BalsamIQ, InVision

Projects

(Please view examples in portfolio, link above)

Access +

- Product concept, design and prototype of a new app feature
- Ideation, User Persona, Wireframes, Sprint Planning
- BalsamIQ, InVision, Slack, ProductPlan, Jira, Miro, Confluence

Ten Peaks

- Deep dive analysis on user and cohort segments for e-commerce website
- Data analysis, Setting KPI's, User Research
- BalsamIQ, InVision, Slack, Jira, Miro, Confluence

OBX Treasure Hunt

- Planned and created new user experience in recreational tourism
- Voice of The Customer, Stakeholder presenting, Value Prop Canvas
- Google Analytics, ProductPlan, Miro, Confluence

EXPERIENCE

Product Owner - B2B & B2C

2020-2021

Twiddy & Company

Corolla, NC

- Increased customer ROI by 50% in one year
- Reduced customer churn rate by 10% in one year
- Increased users from 500 to 5,000 in one year

Project Manager

2019-2021

Soundside Construction

Kitty Hawk, NC

- Used product knowledge decreased job waste by 30% in less than 3 months
- Designed project workflows to increase profits by 40% in one year
- Used key insights to increase production output by 50% in one year

Founder, OBX Treasure Hunt

2019-2021

OBXTREASUREHUNT.COM

Outer Banks, NC

- Increased users 0 - 1,000 in less than 6 months
- Improved user experience by 40% in less than 2 weeks
- Fixed bugs with 100% success rate in less than 24 hours

Product Manager - B2B

2014-2019

Barger Agency.

Baltimore & DC

- Increased long-term market share growth by 12% in less than 4 years
- Leveraged industry knowledge to influence and increase user advocates by 50%
- Ethically monetized relationships to increase sales goals by 10% annually

EDUCATION

UNC Chapel Hill

2023 Product Management Certificate

National Kitchen and Bath Association

2018 Top thirty under thirty winner

Old Dominion University, Norfolk, VA

2014 Bachelors in Science Tourism, Hospitality, and Recreation

I am passionate about serving on the Wake Forest Board of Commission due to the unique blend of big city energy and small-town charm that defines our community. I believe in the power of radical innovation, driven by a visionary mindset, to shape the future of our town. By serving on the board, I can actively contribute to developing and implementing progressive initiatives that enhance the quality of life for residents while preserving the essence of our small-town charm. I am dedicated to fostering a vibrant and forward-thinking environment where residents can thrive, and I am excited to be a catalyst for positive change.

Profile

Veronica

First Name

J

Middle Initial

Roanhouse

Last Name

365 Jorpaul Dr

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

veronicaroanhouse@gmail.com

Email Address

Mobile: (602) 469-6529

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Real Estate Agent

Occupation

Do you live within the town's limits or ETJ?☒ Yes ☐ No**Length of residency in Wake County**

4 Weeks

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

I ran a neighborhood group because we did not have an HOA. I created monthly events designed to make everyone in our neighborhood feel that they belonged. My goal was to create a family feel in our community. I sent mailer invitations and posted signs in the neighborhood to create engagement. One of the years, I started a Wednesday night walking club. The result of all of these efforts was that my neighborhood became extremely friendly and folks new their neighbors. I come from Peoria Arizona. In extreme temperatures, people don't go outside too often and live next door to strangers for 15 years. Not in my neighborhood. We had a Christmas parade that started and ended at my house. When the city came out to look at property across from our neighborhood, my neighbors all called me to find out what was going on. My 12 year old son and I went to the city meeting and held a Facebook Live event on our neighborhood Facebook group. I love bringing people together. It's my superpower.

Question applies to multiple boards



Upload Resume

Question applies to multiple boards

[Veronica_s_Resume_7162023.pdf](#)

Upload a Personal Statement (no more than 100 words)
outlining why you wish to serve of the board(s) or
council you indicated

List any hobbies

I make Kombucha from scratch. I make elderberry syrup from scratch. I sometimes make paperweights when I'm trying to make bread. :) I'm taking Yoga, Zoomba and Hiphop dance at E Carrol Joyner Park. I play the drums. I am a gardener. I love growing my own food and teaching people about superfoods. I LOVE boogie boarding and attempting to surf. I'm not great at Pickleball, but my husband is, so we play a bit. I love fundraising and supporting my kid's sport teams.

Question applies to Planning Board,Board of Adjustment

I participated in the following:

☒ Neither

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Question applies to Planning Board, Historic Preservation Commission, Board of Adjustment

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Veronica Roanhouse

How did you learn about the town's advisory board openings?

☒ Our Town Newsletter

VERONICA ROANHOUSE

CONTACT

📞 902.469.4529
✉ veronicarohanhouse@gmail.com
📍 365 Jansport Dr., Wake Forest, NC 27587

SKILLS

Social Media Content
Communication
Drummer
Hairstylist

EDUCATION

Pre-Schooling
AZ Real Estate and Business

2019
AZREB Offers Pre-licensing courses for the Real Estate Exam

Cosmetology Certificate
Scott Cole Academy

2020
Internationally Acclaimed Cosmetology School

LANGUAGES

English 
Spanish 

PROFILE

My family and I just moved to Wake Forest 5 weeks ago. We moved here for the weather and the trees. We are super gardeners and Arizona's heat offered too great a challenge to keep the soil damp. We are in love with the humidity. My 24 year career in hairstyling came to a finish last November as my real estate career began to thrive. Luckily, the interpersonal skills crossover I am a wanna be dancer and dancer. Life keeps getting better and better the older I get.

WORK EXPERIENCE

Real Estate Agent

Realty One Group, Greener Side 2023

- Social Media content creating to generate leads.
- Event planning and executing for person to person engagement.
- Neighborhood outreach, focused area region marketing (Zillow/Trulia)
- Online Lead followup for digital FARMing.
- Conducting listing and buyers presentations for potential clients.
- Team participant and leader
- Constant learner, audio books are my jam.

Hairstylist

Veronica Roanhouse Hair LLC 2000-2022

- Communication: Thorough consultations to make sure that my client and I are expecting the same outcome.
- Educating each client on the latest products and trends.
- Point of Sale
- Social Media Advertising

Salon Owner

Phat's N Polish 2012-2015

- Hiring and training staff
- Developing systems and methods
- Payroll
- Advertising and Marketing
- Daily Operations

Salon and Cosmetology Teacher

Various schools and Salons 2000-2017

- Keratinase in Salon Representative, Fred Segal: Teaching treatment techniques
- Aesthetics School: Developing curriculum and teach classes
- Aesthetics Salon: Train Assistants
- Aquaguard Updo Education Team
- Phat's Polish the School Phoenix: Teach Business Classes, Head of Social Media and Coordinator

VERONICA ROANHOUSE

CONTACT

602.469.6529

veronicaroanhouse@gmail.com

365 Jorpaul Dr., Wake Forest, NC 27587

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- Paul Mitchel the School Phoenix- Teach Business Classes, Head of Social Media and Enrollment

Profile

Joshua

First Name

Epperson

Last Name

2833 Carriage Meadows Drive

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

joshua.epperson95@gmail.com

Email Address

Home: (706) 691-6469

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Analytics Manager

Occupation

Do you live within the town's limits or ETJ?☒ Yes ☐ No**Length of residency in Wake County**

3 months

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

Experience with Supply Chains and Data Analytics. Additionally, I am pursuing my MBA through NC State starting in the fall.

Question applies to multiple boards

[Epperson_Joshua.pdf](#)

Upload Resume

Question applies to multiple boards

[Epperson_Joshua_Personal_Statement.docx](#)

Upload a Personal Statement (no more than 100 words) outlining why you wish to serve of the board(s) or council you indicated

List any hobbies

Disc Golf, Golf, Reading, Kayaking,

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Joshua Epperson

How did you learn about the town's advisory board openings?

☒ Town website

Joshua Epperson

(706) 691-6469 | Joshua.Epperson95@gmail.com | www.linkedin.com/in/joshua-epperson

CAREER OBJECTIVE

Analytics professional experienced in developing and leading Analytics teams. Interested in improving customer experience and service through the use of advanced analytic models, language processing systems, and big data systems .

EXPERIENCE

Global Process Manager/ Global SC Digitalization Manager

July 2022 – Present

McCormick & Company, Hunt Valley, MD

- Lead a team of 7 Analysts and Managers in the development of new-to-McCormick analytics, automations, and technologies
- Developed the Supply Chain Analytics strategy based on a new enterprise-wide ERP system, including data exposure plans, visualization tools available to users, and security structure
- Created a Site Readiness process to evaluate the performance of the Go Live process through every step of implementation
- Supported a user-centric Power BI group that trained people across Supply Chain, Sales, Marketing, and Finance on how to get started with Power BI and maximize its potential

Data Scientist I/II, Global Supply Chain

Dec 2019 – July 2022

- Started and lead a Supply Chain Automation Hub using coding languages and Microsoft Power Suite to drive efficiency and reduce errors – completed 48 automations, saving 13,000 hours in the first year
- Tested and implemented 5+ enterprise-wide technologies, including Azure, HoloLens, and Microsoft Power Suite, to achieve McCormick's "Supply Chain of the Future" vision
- Expanded utility of data analyses by coaching 6 data scientists and analysts to interpret the results in explorative and transformative ways leading to the generation of 20+ new analytic projects
- Implemented and expanded a Risk Model in Python for 25 sites using machine learning to identify sources of risk based upon monthly results, leveraging natural language generation to produce auto-generated comments
- Devised a Repetitive Tasks Tool to better understand a team's repeated tasks, calculate value lost, and identify projects that maximize return on investment

Process Engineer

July 2018 – Nov 2019

- Trained technicians across 3 shifts on enhanced operational, cleaning, and safety practices – leading to a 4.7% increase in process reliability gains
- Created an overtime and capacity modeling tool for Department and Operations Managers to assess forecasted costs and combine Business, Operational, and Yield Loss projections at the production line level

EDUCATION

Bachelor of Science in Chemical Engineering

May 2018

The Ohio State University, Columbus, OH

GPA: 3.4/4.0

- Minors: Computer Science, Music

Masters Business Administration - Online

Graduating 2025

North Carolina State University, Raleigh, NC

ACHIEVEMENTS & ADDITIONAL SKILLS

- Advanced in Power BI, Tableau; Microsoft Power Suite, RPA, SQL Server; Python, SQL, VBA, R
- Adept at quickly learning new systems and technologies and summarizing their opportunities and risks to leadership
- Commercial Multiple Management Board Chair, completed projects in Sales/Marketing business, including assessing fermented products and packaging cost-savings measures
- Completed MicroMasters in SC Management through MIT edX, as well as certifications in Python, machine learning, Tableau, and Power BI

While I do not have much experience with local government, or Wake Forest. I have had the opportunity to live in a variety of home locations (urban, residential, semi-residential) in a variety of cities (older, college-town, well-designed). These experiences have let me see the impact that a proper planning board can have on the community and those in the surrounding areas. I would love the opportunity to be a part of that process as we look towards what can set up Wake Forest for success in future years.

Profile**Matt**

First Name

Davis

Last Name

229 Woodstaff Ave

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

mattdavis@gmail.com

Email Address

Mobile: (919) 986-4366

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Sales Manager

Occupation

Do you live within the town's limits or ETJ?☒ Yes ☐ No**Length of residency in Wake County**

7 years, 10 months

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

I was the HOA president for my former neighborhood in Wake County (127 homes between Raleigh and Knightdale), and have been elected to the HOA board of my neighborhood in Wake Forest (approximately 125 homes) because of my care for neighbors as well as my leadership skills. More importantly, I love this town and want to give something back to help it continue to grow more beautiful.

Question applies to multiple boards

[MatthewDavis_Resume_2023_v2.docx](#)

Upload Resume

Question applies to multiple boards

[Matt_Davis_Personal_Statement.docx](#)

Upload a Personal Statement (no more than 100 words)
outlining why you wish to serve of the board(s) or
council you indicated

List any hobbies

Youth baseball coach (Town of Wake Forest Rec League), active in our church, MBA candidate at NC State University, weekend golfer, and coin collector.

Question applies to Planning Board, Board of Adjustment

I participated in the following:

☒ Neither

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☒ I Agree

Have you attended a meeting for the board in which you are applying?

☒ Yes ☐ No

If so, what date did you attend a meeting?

7/11/2023

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☒ I Agree

I understand that by agreeing to the above statement and typing my name below, that I am signing this application electronically.

Matthew Davis

How did you learn about the town's advisory board openings?

☒ Other

MATT DAVIS

mdavis27@ncsu.edu • (919) 986-4366 • <https://www.linkedin.com/in/mattdavis530/>

SALES AND BUSINESS DEVELOPMENT LEADER WHO GROWS TEAMS, PARTNERS, AND REVENUE

Technology Sales Leadership, Development, and Coaching

Leader extraordinaire, sales manager, and NC State MBA candidate with over 15 years of experience across multiple industries and roles. Process oriented people leader who has grown business year-over-year in multiple organizations and fields with a primary focus in technology organizations. Also pursuing a shift into management consulting.

- Progressive and consistent business growth at multiple firms
- Bullets quickly draw reader's eyes to important skills and expertise
- Attempt to match qualifications with employer's needs, especially if you have job description; do not attempt if qualifications do not match employer's needs

EXPERIENCE

CISCO SYSTEMS, Research Triangle Park, NC

Mar. 2018 – Current

Cisco is the market leader in enterprise networks, data center solutions, collaboration systems, and IT security

Sales Manager, Data Center and Cloud Infrastructure (Mar. 2021 – Present)

Key Achievements:

- Led team to \$250M in revenue, representing 130% against quota for FY2022, including 21% YoY growth, outpacing over three years of prior results
- Mentored and coached two employees to Chairman's Club (top 1% performers), and two more to Sales Champion (top 10%)
- Managed team of 11 architectural specialist sellers, covering Global Enterprise, Service Provider, and US Public Sector segments
- Earned 102% attainment in first fiscal half-year as leader

Virtual Sales Specialist – Data Center, Global Enterprise Segment (Aug. 2019 – Feb. 2021)

Product specialist, responsible for selling Cisco's Data Center solutions to a set group of Enterprise customers in the Southeast

Key Achievements:

- Established self as leader from creation of this pilot team, developing virtual sales motion and proving efficacy in a business segment that hadn't used virtual sales previously
- First Virtual Sales Specialist to cover a full patch of Enterprise accounts without field support, delivered 3x pipeline multiple with a list of accounts hard-hit by COVID-19 pandemic
- Uncovered and developed new buying centers with large accounts that had not previously purchased this architecture from Cisco

Virtual Account Manager, US Public Sector (Mar. 2018 – July 2019)

Account Manager for ~450 Local Government customers in Northern California

Key Achievements:

- Achieved over 20% YoY growth while taking on segment of underserved customers
- Developed key plays and indicators to grow business and relevancy with local government customers, including solution positioning to match their unique needs
- Opened new key relationships with regional channel partners to land new collaboration solution sales, led all of Western US Public Sector in collaboration sales for Fiscal Year 2019

MATT DAVIS - Page 2

mdavis27@ncsu.edu • (919) 986-4366 • <https://www.linkedin.com/in/mattdavis530/>

CITRIX SYSTEMS, Raleigh, NC

Oct. 2015 - Mar. 2018

Citrix Systems delivers technology that makes the workplace run smoother for IT and front line employees. This includes virtual desktop infrastructure, SD-WAN, and productivity collaboration solutions such as ShareFile.

Territory Account Manager, (Oct 2015 - Mar 2018)

Seller with a focus on productivity collaboration software, responsible for growing business in previously untouched 100-500 employee SMB market, first in Northeast in CY 2016, then in Pacific Northwest in CY 2017.

Key Achievements:

- Grew ShareFile bookings in SMB space for Northeast by over 100% in CY 2016, leading to Achiever's Club recognition
- Recognized as Team Lead in CY17, developed multiple new hires while achieving 115 - 125% attainment consistently throughout the year

BIXLY, Fresno, CA

Jan. 2012 - Sep. 2015

Bixly provides custom web and app development services as well as developer outsourcing for business customers.

General Manager, (Jan 2012 - Sep 2015)

Key Achievements:

- Developed end-to-end business strategy and go-to-market resulting in multiple years of consistent 25 - 40% YoY revenue growth.
- Successfully instituted proper HR controls, legal contract review for company protection with client services, and navigated multiple client disputes at zero to minimal cost to company
- Shifted hiring strategy to focus on local US-based developers, grew local headcount by 50%, which became a significant contributor to firm's consistent revenue growth

EDUCATION AND CREDENTIALS

NORTH CAROLINA STATE UNIVERSITY, JENKINS GRADUATE SCHOOL OF MANAGEMENT,
Raleigh, NC (ant.) Jun. 2026

Master of Business Administration (MBA), STEM MBA
Current student

UNIVERSITY OF CALIFORNIA - SANTA CRUZ, Santa Cruz, CA
Bachelor of Arts, Politics

Jun. 2006

PROFESSIONAL DEVELOPMENT AND TRAINING

- Executive Presentation and Delivery coaching, Cisco 2022
- FUEL - Fostering Unique and Emerging Leaders, Cisco 2019
- Force Management Sales, Citrix 2016

ADDITIONAL INFORMATION

Computer Skills: MS Office, Salesforce

Interests: Youth baseball coach, 49ers football, Giants baseball, Wolfpack sports, USA coin collector, Active in local church, HOA Board for neighborhood

I have always been service-oriented and civic-minded, and I love this town. I understand the challenge involved in this role because I have been HOA President in my former neighborhood, and have been elected to the Board in my neighborhood here in Wake Forest. I will work diligently to apply the UDO and also consider citizen feedback in recommendations to the Board of Commissioners. I believe in responsible, beautiful, and continued growth for our town, with a focus on service for our citizens.

I hope to join the Planning Board and serve as Wake Forest continues to grow beautifully.

Profile

Jennifer

First Name

A

Middle Initial

Haley

Last Name

213 Artisan Park Dr.

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

jenhaley@ymail.com

Email Address

Mobile: (732) 236-7358

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Pharmacist

Occupation

Do you live within the town's limits or ETJ?☒ Yes ☐ No**Length of residency in Wake County**

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

We moved to town in January and would love to get involved.

Question applies to multiple boards

[Jennifer Haley 2022 NC.docx](#)

Upload Resume

Question applies to multiple boards

Upload a Personal Statement (no more than 100 words)
outlining why you wish to serve of the board(s) or
council you indicated**List any hobbies**

Exercise

I participated in the following:

☒ Neither

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☒ I Agree

Have you attended a meeting for the board in which you are applying?

☐ Yes ☒ No

If so, what date did you attend a meeting?

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☒ I Agree

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Jennifer Haley

How did you learn about the town's advisory board openings?

☒ Other

Jennifer Haley, Pharm D, CCP
Wake Forest, NC 27587
732-236-7355

213 Artisan Park Dr.,
Jenhaley@ymail.com

Profile

Clinical Pharmacist

Qualifications:

- Jennifer Haley, Pharm D, CCP is a licensed pharmacist in New Jersey (Pending NC) with Pharm D. degree and more two decades of experience providing top-notch, high volume, pharmacy services in retail and clinical settings. Many years of experience cohesive and at times spent with several different companies concurrently.
- Jennifer is a motivated Pharmacy professional with outstanding interpersonal skills, a track record of establishing positive relationships with customers, medical professionals, healthcare organizations and insurance providers. Respected leader, able to train and manage diverse teams to deliver optimal performance. Exceptional critical thinking abilities: managerial experience to include implementing policies and procedures to ensure compliance (Compliance Officer) managing inventory, assisting with employee scheduling and maintaining relationships with internal and external stakeholders.
- Jennifer has broad therapeutic and clinical experience within Population Health Management, and managed care.
- Skillset includes: Evidence based clinical decision support, pharmacy/clinical analytics, and drug information.

Skills

- Prescription Dispensing/Compounding
- Drug Utilization Review
- Disease State Module Template Formation
- Inventory Control,
- AphA certified Immunizer
- CPR for Health Professionals
- White Belt Certification

Experience

Clinical Pharmacist , VBC Contracting Management Medical Affairs

March 2017-Present

Aetna- Remote

- Serves as a practice extension to support Value Based Contracting provider groups and drive engagement.
- Serves a Population Health Pharmacist: Value-Based Contracting, social determinants of health and using population health management strategies for optimal outcomes.
- An integral member of the Medical Affairs Team that aids in identifying high risk Medicare members.
- Reviews and evaluates pharmacy reports, clinical systems and member claims data to identify members and prescribers requiring clinical pharmacy interventions

- Works with the practices to identify opportunities to enhance the quality of care provided by the practice through practice re-design suggestions as it relates to appropriate prescribing of medication.
- Recommends services for Aetna Medicare members utilizing alternatives available within the community and nationally, as it relates to medication Utilization
- Provides support for joint Aetna-provider group clinical initiatives as they relate to medication management and patient access. Project management focus.
- Conducts accurate and comprehensive medication reviews on complex members; develop therapeutic plans and interventions; close the contact loop with the corresponding member, care manager and or provider with outreach as necessary
- Participates in clinical meetings and multidisciplinary case rounds
- Assists providers and members with optimizing pharmacy benefits.
- Collaborates with Aetna pharmacists dedicated to post-discharge medication reconciliation, Stars quality measures, readmission avoidance and complex medical case management on initiatives to provide the best patient outcomes

Clinical Contract PBM Pharmacist, Remote (March 2020 -December 2020) Part time

- As a Clinical Pharmacist I completed assigned operational tasks using standard appropriate tools (Siebel, BA, Clinical Rules Platform, Criteria, Coverage Benefits, etc.) and provided support to client requests under the direction of the Managers and other team members. Responsibilities include (but were not limited to) support of service transactions associated with business needs including but not limited to business partner support and internal team support, handling daily request tracking, researching operational issues and running reports for internal and external clients upon request; provide documentation related to completion of assigned tasks.
- Provided support to the team and escalated issues, risks, concerns as needed.

Clinical Infusion Pharmacist

September 2003- March 2017

American Outcomes Management, New York, NY September 2004 - July 2006; January 2015 -August 2016

Prompt Care Companies, Clark NJ September 2016 - March 2017

Home Care Services, Edison, NJ April 2013- November 2014

University Medical Center at Princeton, Princeton, NJ August 2006-October 2008

- Assessed patient's general pharmaceutical needs
- Planned for the pharmaceutical services needed

- Participated in the overall plan of care as part of the multidisciplinary team. Completed an individual Care Plan for each member and updating it as goals are achieved.
- Documented treatment goals and when the patient reaches the goals.
- Evaluated the appropriateness of the: dosage, drug choice, potential drug interactions, route of administration and stability.
- Maintained a routine of scheduled inspections of medical records
- Ensured that pertinent information contained within the database is completely filled out with patient's; height, weight, current and past medical history, clinical laboratory results, and concurrent medications (including over-the-counter or home remedy medications).
- Assisted in the maintenance and upkeep of all necessary paperwork required by state and federal agencies as well as the Joint Commission and ACHC.
- Ensured that when necessary, laboratory tests have been ordered and the results are obtained and discussed with the physician.
- Competent in IV, TPN, and home-pump preparation.
- Proficient in Pump programming.
- Participate in the process of drug therapy instructions to the patient.
- Participate in inter-disciplinary patient care conferences.

Supervising Pharmacist

March 2009- March 2013

Quick Rx Corp., New York

- Ensured the accuracy and appropriateness of all prescriptions filled
- Contributed to the growth of a profitable business by increasing new script growth and maintaining prescription adherence.
- Implemented recommended clinical programs including MTM (Medication Therapy Management) and adherence programs.
- Provided excellent customer service by assisting customers with medical-related issues and providing healthcare counseling.
- Supervised the work completed by Pharmacy Technicians and support staff while on duty.
- Performed all duties of Staff Pharmacist.
- Participates in NYS ESAP program.
- Participated in Pharmlink and PATlink studies, a project to evaluate health service expansion through ESAP.

Clinical Consultant Pharmacist

January 2008-June 2012

Integrated Healthcare Consultants, Remote

- Work independently as a consultant pharmacist.
- Provide education and process consultation to the client.
- Assist in the development of member and provider facing tools, resources, and educational outreach materials (disease state modules)

Clinical Coordinator

March 2003- August 2004

Peninsula Hospital, Far Rockaway, NY

- Participate in interdisciplinary patient care rounds and communicate follow-up with clinical pharmacist.
- Prevent, detect, and resolve medication-related problems and to make appropriate evidence-based,
- patient-centered medication therapy recommendations as part of the interdisciplinary team.
- Determine and resolve any medication therapy problems
- Appropriately documented clinical interventions.
- Provided concise, applicable, comprehensive, and timely responses to requests for drug information from patients and health care providers.
- Provide discharge medication teaching upon request and document teaching as appropriate.

Education

Pharm D

Albany College of Pharmacy and Health Sciences

MS Health Data Science 2022

Jefferson College of Population Health

Profile

Anthony

First Name

Skubic

Last Name

812 Trinity Park Dr

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

anthonyskubic@gmail.com

Email Address

Mobile: (919) 339-3121

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Project Manager

Occupation

Do you live within the town's limits or ETJ?☒ Yes ☐ No**Length of residency in Wake County**

< 1 year

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

Construction management professional with several years of experience with current project completion portfolio of ~ \$120,000,000. Experienced in handling and planning complex projects from public projects such as education, to private projects including healthcare and research laboratories.

Question applies to multiple boards

[Anthony_Skubic_Jr_with_Project_Experience_2_1_.pdf](#)

Upload Resume

Question applies to multiple boards

[Wake_Forest_Planning_Board_-_Skubic.pdf](#)

Upload a Personal Statement (no more than 100 words) outlining why you wish to serve of the board(s) or council you indicated

List any hobbies

Question applies to Planning Board, Board of Adjustment

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☒ I Agree

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Anthony Skubic

How did you learn about the town's advisory board openings?

☒ Town website

Anthony Skubic Jr

Project Manager

PROFILE

Currently positioned as a Project Manager with BE&K Building Group managing a vivarium project for Duke Health and serving as an AH-64D/E Attack Helicopter Maintainer in the North Carolina Army National Guard.

I value challenging environments where I can face new and pressing problems. I am eager to learn, assist, and lead on any team.

CONTACT

PHONE:
919-339-3121

WEBSITE:
<https://www.linkedin.com/in/anthonyskubic/>

EMAIL:
anthonyskubic@gmail.com

SKILLS AND CERTIFICATIONS

SolidWorks
CATIA v5
AutoCAD
Procore
BIM 360
Bluebeam
CFC EPA Certified
OSHA 10 Hour
OSHA 30 Hour
OSHA Trenching & Excavation
First Aid, CPR & CLS
CDL Class B

HOBBIES

Recreational Flying – Private Pilot
Motorcycling
Hiking

EDUCATION

Wake Technical Community College

September 2019 - Present
Associate in Engineering

Northeastern University

September 2012 – June 2015
Candidate for Bachelor of Science in Mechanical Engineering

WORK EXPERIENCE

BE&K Building Group

Project Manager

October 2022 - Present

- Tracked and executed change order proposals for the DLAR Vivarium project. building and client owner requirements outside of scope.
- Assumed complete control of the DLAR Vivarium project, reporting to Director of Operations.
- Created monthly cost project reports for company executive leadership.
- Interfaced with the client on a consistent basis to ensure implementation of requests, requirements, and out of scope work.

Assistant Project Manager

April 2022 – October 2022

- Tracked and executed change order proposals for the DLAR Vivarium project. building and client owner requirements outside of scope.
- Led commissioning, punchlist, and validation of the BSL3 project for Duke SoM.
- Assisted Project Manager and Project Executive in preparing monthly cost reports, project status reports, and executing subcontracts post bid.

Project Engineer II

March 2021 – March 2022

- Assisted in coordinating BIM modeling efforts while integrating 3rd party equipment, providing on site feedback to the modelers.
- Drove substantial completion items to finish and completed additional work to meet building and client owner requirements outside of scope.
- Processed and reviewed submittals, RFIs, and SOVs.

Barnhill Contracting Company

Project Engineer

July 2019 – March 2021

- Assisted the Project Manager in executing change order proposals.
- Directed several different trades in the field to complete their scope of work including building foundations.
- Processed and reviewed submittals to include shop drawings.
- Delivered RFI's to the design team and coordinated changes in the field.
- Performed constructability review during preconstruction and lead other preconstruction efforts in anticipation of bidding.

U.S. Army, North Carolina Army National Guard

AH-64D/E Helicopter Maintainer

October 2018 – Present

- Replaced mechanical components on the AH-64D/E including engine swaps, main rotor head replacements, and blade swaps.
- Completed write ups for all work performed on the aircraft includ

Project Experience

Trask Middle School Renovation

Wilmington, NC July 2019 – April 2020

\$11MM Project Value, Project Engineer Role

- 92,000 sqft renovation project for New Hanover County Public Schools. Project highlights included the addition of a clerestory spanning 10 classrooms, new landscaped courtyard, new AHUs, switchgear, transformers, TPO roof, storefront, windows, VCT, paint, and CMU walls.

Port of Wilmington, South Gate Complex

Wilmington, NC May 2020 – March 2021

\$21MM Project Value, Project Engineer Role

- 11-acre site expansion project complete with heavy duty concrete and asphalt paving, extensive underground utilities to include electrical, sanitary/sewer, water. Infrastructure to support 3rd party installation of RFID technology, OCR portals, radiation monitors, and GC installed weigh in motion scales.
- New 8,200 sqft office building constructed with steel on concrete slab, cold formed metal framing with structural marine grade plywood. Building exterior included polish faced CMU, pre-engineered metal wall panels, storefront, and a torch applied roof.

Duke Health, CIVICS Project

Raleigh-Durham (RTP), NC March 2021 – July 2021

\$10MM Project Value, Project Engineer II Role

- Laboratory renovation project spanning roughly 100,000 sqft complete with new/reused laboratory casework, bio-safety cabinets, LN2, RODI, CO2, DCW, DHW, and laboratory waste piping. Provided new utility services for several freezer farm areas with industrial epoxy flooring. Additionally, renovated four floors of office space for clinical staff to interface with Duke clients.

Duke Health, Denny Labs Project

Raleigh-Durham (RTP), NC April 2021 – September 2021

\$10MM Project Value, Project Engineer II Role

- Laboratory renovation project spanning roughly 80,000 sqft complete with new/reused laboratory casework, bio-safety cabinets, LN2, RODI, CO2, DCW, DHW, and laboratory waste piping. Provided new utility services for several freezer farm areas with industrial epoxy flooring.

Duke Health, BSL3 Project

Raleigh-Durham (RTP), NC March 2021 – Present

\$5MM Project Value, Project Engineer II, APM, and PM Role

- BSL3 renovation project spanning roughly 3,000 sqft complete with

hardware interlocks. Select demolition of above ceiling areas included reuse of existing phoenix valves while adding numerous bubble tight dampers and new phoenix valves. Industrial epoxy flooring throughout. BSL3 renovation project spanning 3,000 sqft complete with new/reused laboratory casework, DPI sensors, decon switches and hardware interlocks. Select demolition of above ceiling areas included reuse of existing phoenix valves while adding numerous bubble tight dampers and new phoenix valves. Industrial epoxy flooring throughout.

- Validation of the space to ensure compliance with FDA and other governing body requirements.

Duke Health, DLAR/Vivarium Project

Raleigh-Durham (RTP), NC May 2021 – Present

\$29MM Project Value, Project Engineer II, APM, and PM Role

- Six story Vivarium renovation project including replacement of existing AHUs in basement, select floor demolition to erect steel supporting cage wash equipment and bedding disposal systems. Providing utilities for laboratory chemical fume hoods, bio-safety cabinets, autoclaves, and sterilizers. Exterior improvements include expansion of the existing loading dock with new dock levelers, fiber cement and metal wall panels.
- Project value had been increased by approximately 25% through the change order process, adding to the complexity and duration of the project.

July 21, 2023

To the Wake Forest Planning Board and the Residents of Wake Forest,

My name is Anthony Skubic, and while I may be a relative newcomer to the wonderful town of Wake Forest, I am no stranger to North Carolina or service to the people of this state. After establishing North Carolina as my new home in 2017, I enlisted in the North Carolina Army National Guard as an AH-64D/E Attack Helicopter Mechanic in 2018. Upon returning from basic training and advanced individual training, I started my construction management career with Barnhill Contracting as a project engineer in Wilmington, NC. I completed two landmark projects for New Hanover County and the North Carolina State Ports Authority, specifically the Emma B. Trask Middle School renovation project, and the NCSPA South Gate Expansion project. Worthy of note, the South Gate project was a critical component to positioning North Carolina as the fastest growing port on the United States' eastern seaboard. Following my tenure at Barnhill Contracting, I moved to Durham, NC to work with BE&K Building Group. I was immediately tasked on the Duke Health projects at AREE's newly acquired Alexandria/Parmer campus. In short order, through superior work, I was promoted to Assistant Project Manager and subsequently Project Manager. While those projects have all but wrapped up, I was then placed at Syngenta's expansion project in Greensboro, NC to bring the project up to standard.

While my fledgling construction career has certainly been an atmospheric ride, my commitment to the people of NC has remained as I approach my fifth year in the National Guard with plans to continue for many more. My goal of joining the Wake Forest Planning Board is to leverage my construction experience with my call to service. I would seek to ensure Wake Forest remains a premier town, expanding our parks system, diversifying our businesses, and ensuring that we are ready for the next several decades of growth. My interest in the town extends beyond my own desires, as I want to make this town the best it can be for my own kids and future generations of Carolinians.

I look forward to the opportunity to continue to serve in any way that the people would see fit.

Sincerely,

A handwritten signature in black ink, appearing to read "Anthony Skubic". The signature is stylized with a large, looped "A" and "S".

Anthony Skubic

Profile

Elaine

First Name

Sheppard

Middle Initial

Last Name

341 Simwood Avenue

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

ensheppard26@gmail.com

Email Address

Mobile: (714) 232-2954

Primary Phone

Home: (984) 235-4462

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Retired

Occupation

Do you live within the town's limits or ETJ?☒ Yes ☐ No**Length of residency in Wake County**

3 years

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

I have helped my neighborhood understand the new developments being proposed around us for that past 2 years. I have interacted with various Town entities to gain additional information and clarification. I have participated in neighborhood meetings and spoken before the Planning Board and Board of Commissioners at public hearings. Through this involvement I have learned about the Town planning process and gained some familiarity with the Community Plan and UDO. I will be attending the Citizens Academy this fall.

Question applies to multiple boards

[Elaine Sheppard Resume 2023 PDF.pdf](#)

Upload Resume

Question applies to multiple boards

[Elaine Sheppard Personal Statement PB Application PDF.pdf](#)

Upload a Personal Statement (no more than 100 words) outlining why you wish to serve of the board(s) or council you indicated

List any hobbies

Travel Gardening Walking / Biking Reading Cross stitch

Question applies to Planning Board, Board of Adjustment

I participated in the following:

☒ Neither

Ethics Guidelines for Town Advisory Boards and Councils

Please Agree with the Following Statement

If appointed, I pledge to comply with the following ethics guidelines for advisory boards and commissions as adopted by the Wake Forest Board of Commissioners

☒ I Agree

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If the advisory board or council member believes he/she has a conflict of interest then that member should ask the advisory board or commission to be recused from voting. The advisory board or council should then vote on the question on whether or not to excuse the member making the request. In cases where the individual member or the advisory board or council establishes a conflict of interest, then the advisory board or council member shall remove themselves from the voting area.

Any advisory board or council member may seek counsel of the Town Attorney on questions regarding the interpretation of these ethics guidelines or other conflict of interest matters. The interpretation may include a recommendation on whether or not the advisory board or council member should excuse himself/herself from voting. The advisory board or council member may request that the Town Attorney respond in writing.

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Please Agree with the Following Statement

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☒ I Agree

Please Agree with the Following Statement

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☒ I Agree

Have you attended a meeting for the board in which you are applying?

☒ Yes ☐ No

If so, what date did you attend a meeting?

July 11, 2023

Please Agree with the Following Statement

I understand this application, including any information provided therein, may be considered a public record and as such portions may be subject to release under North Carolina General Statute Chapter 132, Public Records.

☒ I Agree

I understand that by agreeing to the above statement and typing my name below, that I am signing this application electronically.

Elaine N Sheppard

How did you learn about the town's advisory board openings?

☒ Town website

ELAINE SHEPPARD

714-232-2954
ensheppard26@gmail.com

341 Simwood Avenue
Wake Forest, NC 27587

PROFILE

I am dedicated, organized, personable professional eager to become more involved in my community. I enjoy many aspects of life in Wake Forest, including community events, shopping on White Street, and pounding the pavement on the greenways. I would like to give back to Wake Forest and feel that my talents and experience are a great fit for the Planning Board.

EXPERIENCE

KUBOTA TRACTOR CORPORATION; TORRANCE, CA

Consultant — 2015-2016

Interviewed and gave input for my replacement as Wholegoods Purchasing Manager, trained replacement; took on special projects for Purchasing Department; assisted with department activities related to corporate move to Texas

Wholegoods Purchasing Manager — 2009-2015

Oversaw wholegoods purchases for all US warehouses exceeding \$1 billion annually; managed relationships with over 35 vendor including supply contract negotiations; member of cross-functional teams to introduce new products and set up ordering system for dealers; managed purchasing department of 9 employees, reported to Director of Product Resources

Assistant Manager Purchasing / Assistant Manager Planning — 1997-2009

Responsible for purchases valued at \$50 million annually and allocations from primary vendors; oversaw inventory balance between US warehouses; helped create and implement several direct ship programs to move product directly from vendor to dealers; created and modified Business Warehouse queries to support purchasing activities; member of cross functional team to implement SAP

Purchasing Specialist — 1995-1997

Updated excel spreadsheets to support purchasing planning activities; entered and maintained purchase orders in online system; followed up with vendors to move up product shipments as needed; handled inventory requests from sister companies; interpreted for KTC president and guests as needed

KUBOTA AMERICA CORPORATION; LOS ANGELES, CA

Sales Assistant — 1992-1995

Handled orders from order contract through invoicing and payment; visited customers in Los Angeles and Silicon Valley regions; coordinated shipment of fog systems from supplier in LA to Kubota Japan; assisted sales managers as needed

EDUCATION

Washington University, St. Louis, MO — BA Japanese, 1988

University of Michigan, Ann Arbor, MI — MA Japanese Studies, 1992

COMMUNITY INVOLVEMENT

Member, Wake Forest Garden Club; Wake Forest, NC — 2023-Present

Member, North Wake Senior Center; Wake Forest, NC — 2022-Present

Arts Ambassador, Cerritos Center for Performing Arts; Cerritos, CA 2018-2020

Girl Scout Co-Leader — 2006-2009

ELAINE SHEPPARD
PLANNING BOARD APPLICATION

PERSONAL STATEMENT

The Town planning process has captured my interest. Through my involvement in proposed developments surrounding my neighborhood I have learned a lot about the planning process and the role the Community Plan and UDO play in that process. In my professional life I was very attentive to detail and regularly made decisions that were in the best interest of the business. I feel that my professional experiences and interest would be a good fit for the Planning Board, and would give me a great opportunity to give back to Wake Forest.

Profile

Anna

First Name

L

Middle Initial

Shope

Last Name

212 Woodstaff Avenue

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

annalshope@gmail.com

Email Address

Home: (336) 601-2000

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Dentist

Occupation

Do you live within the town's limits or ETJ?☒ Yes ☐ No**Length of residency in Wake County**

18 years

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

Attended citizens planning academy Served on various board and committees including Delta Zeta Alumni advisory board, Junior League transfer and arrangements committee and North Carolina Dental Society district board Interest in Wake Forest community and future

Question applies to multiple boards

[Anna_L_Shope.pdf](#)

Upload Resume

Question applies to multiple boards

[With my career being so healthcare and science focused I m looking for a way to be involved](#)

Upload a Personal Statement (no more than 100 words)
outlining why you wish to serve of the board(s) or
council you indicated

List any hobbies

Reading, exercising, checking out new local restaurants/breweries, spending time with my husband and daughter

Question applies to Planning Board,Board of Adjustment

I participated in the following:

☒ Citizen's Planning Academy

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☒ I Agree

Have you attended a meeting for the board in which you are applying?

☐ Yes ☒ No

If so, what date did you attend a meeting?

Please Agree with the Following Statement

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☒ I Agree

I understand that by agreeing to the above statement and typing my name below, that I am signing this application electronically.

Anna L Shope

How did you learn about the town's advisory board openings?

☒ Other

Anna L. Shope

212 Woodstaff Avenue • Wake Forest, North Carolina • (336) 601-2000 • annalshope@gmail.com

ACADEMIC BACKGROUND

D.D.S. University of North Carolina at Chapel Hill 2008-2012
School of Dentistry
Chapel Hill, North Carolina

B.S. North Carolina State University 2004-2008
Raleigh, North Carolina
Summa Cum Laude

Honors:

Phi Beta Kappa Society, North Carolina State University, inducted Spring 2006

College of Agriculture and Life Sciences Honors Program, North Carolina State University, 2006-2008

Scholarships:

North Carolina State Park Scholar, 2004-2008
Full scholarship for undergraduate studies

National Merit Scholarship, 2004-2008
\$2500 annual scholarship

CLINICAL TRAINING:

Lutheran Medical Center-AEGD Residency Program
Winslow Indian Health Care Center Winslow, Arizona
Resident July 2012-July 2013

INTERNSHIPS:

Baby Oral Health Program (BOHP), Lincoln Community Health Center,
Durham, North Carolina, Fall 2011

Patients with Developmental Disabilities Rotation, UNC School of Dentistry,
Chapel Hill, North Carolina, Spring 2012

EXTERNSHIPS:

Guilford County Health Department, High Point, North Carolina, Summer 2011; Pediatric and Pregnant Patients

Indian Health Service Rotation, Winslow, Arizona, Summer 2011

Indian Health Service Rotation, Cherokee, North Carolina, Summer 2011

EMPLOYMENT:

Wells Family Dental Group
General Dentist
May 2022-present

Rafael Rivera, JR., DDS, PLLC, Staff Dentist
Treat appointed patients and emergencies in pediatric setting
June 2014-April 2022

Adjunct Dental Faculty, UNC School of Dentistry Operative Department
Act as attending dentist to student dentist in predoctoral clinic
August 2014-December 2015

Anna L. Shope

212 Woodstaff Avenue • Wake Forest, North Carolina • (336) 601-2000 • annalshope@gmail.com

Winslow Indian Health Care Center, Staff Dentist
Attending dentist to AEGD dental residents and 4th year dental students
Experience in restorative, crown and bridge, endodontics, removable,
limited orthodontics, periodontic and oral surgery
July 2013-June 2014

VOLUNTEER SERVICES:

Wake Smiles Volunteer
Spring 2015

-Perform dental treatment to patients at free clinic

Crest Healthy Smiles, Organizer

Spring 2009, Fall 2009, Spring 2010, Fall 2010, Spring 2011, Fall 2011

-Provide screenings and oral hygiene instruction for attendees of
local Boys and Girls Clubs

Dental Mission Trip, Kathmandu, Pokhara, and Meghauli, Nepal, Summer
2010

-Provided dental care to community, primarily through exodontia,
atraumatic restorative technique (ART), and oral hygiene instruction

PROFESSIONAL MEMBERSHIPS:

American Dental Association, 2008-present

North Carolina Dental Society, 2008-present

-District 4 Vice President 2015-2016

-District 4 delegate for NCDS annual session; May 2015/2016

Junior League Raleigh, 2011-present

SPECIALIZED TRAINING/ CERTIFICATION:

CPR-BLS Certification-current

Council of Interstate Testing Agencies Board Exam-Passed Spring 2012

North Carolina State Board of Dentistry- License to Practice Dentistry

Experience with EPR, Dentrix Enterprise and Eaglesoft

RESEARCH/PRESENTATIONS:

Study on the effects of periodontal disease on pregnancy outcomes, 2007,
Cataloged data from national sample collection.

Effect of Periodontal Disease on Pregnancy Outcomes: Systematic Review,
College of Agriculture and Life Sciences Undergraduate Research
Symposium, North Carolina State University, 2008

REFERENCES:

Available upon request.

With my career being so healthcare and science focused, I'm looking for a way to be involved in my community where I live and work that not only explores something very different from my day to day, but also has the potential to make a big impact. Serving on the planning board will allow me to become more knowledgeable about my community while helping to steer decisions that will make Wake Forest continue to be a wonderful place to live into the future. I am excited to have the opportunity to be a part of the bigger picture.

Profile

Sarah

First Name

Mobraten

Middle Initial

Last Name

112 Tenbridge Ct

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

sarahmobraten@ls3p.com

Email Address

Home: (781) 254-8301

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Architect

Occupation

Do you live within the town's limits or ETJ?☒ Yes ☐ No**Length of residency in Wake County**

8 years

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

I am a commercial architect in Wake County and have had some interaction with the City of Raleigh Planning Commission and Appearance Commission on previous projects. I feel that my experience in the architecture and engineering industry gives me a good basis of understanding from which to start.

Question applies to multiple boards

[Sarah_Mobraten_Resume.pdf](#)

Upload Resume

Question applies to multiple boards

[Mobraten_Statement.pdf](#)

Upload a Personal Statement (no more than 100 words) outlining why you wish to serve of the board(s) or council you indicated

List any hobbies

Gardening, cooking, reading, spending time with family

Question applies to Planning Board, Board of Adjustment

I participated in the following:

☒ Neither

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☒ I Agree

Have you attended a meeting for the board in which you are applying?

☒ Yes ☐ No

If so, what date did you attend a meeting?

7/11/2023 - Virtual attendance

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☒ I Agree

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Sarah Mabraten

How did you learn about the town's advisory board openings?

☒ Our Town Newsletter

SARAH MOBRATEN AIA, LEED AP BD+C

Associate Principal/ Project Manager



REGISTRATION(S)

Registered Architect: NC, MA

EDUCATION

Clemson University,
Master of Architecture

Furman University,
Bachelor of Arts in English

COMMUNITY INVOLVEMENT & PROFESSIONAL AFFILIATIONS

American Institute of Architects

USGBC LEED Accredited
Professional

LS3P Associate Principal Sarah Mobraten serves as the Operations & Finance Manager for LS3P's Raleigh office and brings over 15 years of commercial experience in a variety of project types. She has developed a significant portfolio of renovation work and frequently collaborates with partner interior design consultants to incorporate their conceptual designs. Sarah's previous work at a Boston firm includes the Mirbeau Inn & Spa, which was one of Travel & Leisure's top 20 small resorts in New England in 2017 and has been recognized with a Conde Nast Traveler's Reader's Choice Award each year since its 2014 opening.

Sarah is well-versed at managing projects at all stages of design and construction, and her work encompasses diverse practice areas such as hospitality, multifamily residential, office, K-12, mixed-use, and masterplanning. She is also active in community service, volunteering at events such as We Care and the 9/11 Day of Service.

RELEVANT PROJECT EXPERIENCE

NC Education Campus
Raleigh, NC

DHHS - Phase 1 Campus
Raleigh, NC

Albemarle Building Renovation
Raleigh, NC

Tidal - Wilmington Street Multifamily
Raleigh, NC

Raleigh Convention Center - Interior Enhancements
Raleigh, NC

Inn at Elon
Elon, NC

Cary Academy - Multiple Projects
Cary, NC

Umstead Hotel Renovation
Cary, NC

Perimeter Park Office Buildings
Raleigh, NC

Honeycutt Farm Amenity Buildings
Holly Springs, NC

Sheraton Boston North Tower*
Boston, MA

Mirbeau Inn & Spa *
Plymouth, MA

Harvard Square Hotel*
Cambridge, MA

Andover Inn*
Andover, MA

* Denotes previous firm experience

Sarah Mobraten Personal Statement

As an Architect and Project Manager for the commercial architectural firm LS3P, I have worked across multiple jurisdictions in Wake County and have experience with the planning departments in many of those. I have been a resident of Wake Forest for two years and am interested in expanding my own knowledge and expertise, as well as sharing my experience and supporting the growth of the town in which I live.

Profile

Shipman

First Name

Northcutt

Middle Initial

Last Name

304 Capellan Street

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

shipnorth@gmail.com

Email Address

Home: (919) 271-7504

Primary Phone

Home: (919) 271-7504

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Sales

Occupation

Do you live within the town's limits or ETJ?☐ Yes ☒ No**Length of residency in Wake County**

18 years

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

Extensive background in Strategy planning I hold a North Carolina RE license. I am a Wake Forest Rotary member. President Elect, Rotaring of the year I volunteer my time serving small business owners. I serve on the Boys Scouts fund raising committee.

Question applies to multiple boards

[Shipman_Northcutt_Resume072019v3.docx](#)

Upload Resume

Question applies to multiple boards

[Shipman_Northcutt_SNGv2.pdf](#)

Upload a Personal Statement (no more than 100 words) outlining why you wish to serve of the board(s) or council you indicated

List any hobbies

Golf, Reading, Skiing, Yoga,

Question applies to Planning Board, Board of Adjustment

I participated in the following:

☒ Neither

Ethics Guidelines for Town Advisory Boards and Councils

Please Agree with the Following Statement

If appointed, I pledge to comply with the following ethics guidelines for advisory boards and commissions as adopted by the Wake Forest Board of Commissioners

☒ I Agree

Members of advisory boards and councils shall not discuss, advocate or vote on any matter in which they have a conflict of interest or an interest which reasonably might appear to be in conflict with the concept of fairness in dealing with public business. A conflict of interest or a potential conflict occurs if a member has a separate, private or monetary interest, either direct or indirect, in any issue or transaction under consideration. Any member who violates this provision may be subject to removal from the board or council.

If the advisory board or council member believes he/she has a conflict of interest then that member should ask the advisory board or commission to be recused from voting. The advisory board or council should then vote on the question on whether or not to excuse the member making the request. In cases where the individual member or the advisory board or council establishes a conflict of interest, then the advisory board or council member shall remove themselves from the voting area.

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Prior to being appointed to an advisory board/council, it is recommended that you attend a meeting of the advisory board/council in which you have an interest. This helps each applicant to be more aware of the work of the advisory board/council. If you have attended a meeting of an advisory board/council, please indicate the date:

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Per NCGS 160C-109, members of appointed boards shall not vote on any advisory or legislative decision regarding a development regulation adopted where the outcome of the matter being considered is reasonably likely to have a direct, substantial, and readily identifiable financial impact on the member. An appointed board member shall not vote on any zoning amendment if the landowner of the property subject to a rezoning petition or the applicant for a text amendment is a person with whom the member has a close familial, business, or other associational relationship. A member of any board exercising quasi-judicial functions shall not participate in or vote on any quasi-judicial matter in a manner that would violate affected persons' constitutional rights to an impartial decision maker. Impermissible violations of due process include, but are not limited to, a member having a fixed opinion prior to hearing the matter that is not susceptible to change, undisclosed ex parte communications, a close familial, business, or other associational relationship with an affected person, or a financial interest in the outcome of the matter. A "close familial relationship" means a spouse, parent, child, brother, sister, grandparent, or grandchild. The term includes the step, half, and in-law relationships.

☒ I Agree

Please Agree with the Following Statement

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☒ I Agree

Have you attended a meeting for the board in which you are applying?

☒ Yes ☐ No

If so, what date did you attend a meeting?

I completed the Planning board Academy in April of 2019. I attended two live meetings following my completion

Please Agree with the Following Statement

I understand this application, including any information provided therein, may be considered a public record and as such portions may be subject to release under North Carolina General Statute Chapter 132, Public Records.

☒ I Agree

I understand that by agreeing to the above statement and typing my name below, that I am signing this application electronically.

Shipman northcutt

How did you learn about the town's advisory board openings?

☒ Newspaper

Raleigh-Durham, NC ☐ 919.271.7504 ☐ shipnorth@gmail.com ☐ LinkedIn.com/in/shipman-northcutt/

PROFESSIONAL QUALIFICATIONS PROFILE

Senior level sales and leadership professional with 25 years' experience and proven track record in business development and consulting. Primary focus is B2B development with an emphasis on Sales and Marketing. Challenges conventional thinking. Considered a leader of people specializing in directly managing multiple high-performing teams. Led company in creating new, powerful customer relationships and market opportunities that have "transcended the industry norm". Seeking to utilize my vast experience and expertise to be an integral part of a successful, forward-looking organization.

- **B2B Development:** Built a powerful, high revenue Market Development Program and field team in 2014 for the Carquest Brand. Created the Value proposition that led to complete brand/business differentiation. Traveled the United States market and hired critical staff. This work resulted in doubling new business production in 24 months (select numbers confidential). Innovations included blending the Market Development staff into each region. In 2018, this led to the largest new business growth in the history of the brand and 2019 will exceed 2018.
- **Sales & Marketing Process Innovations:** Created and enhanced the Partnership Selling Model then implemented sales process focused on these proven principles. Adapted a Six-Step Process specific to industry and taught it across all teams. This is the core framework for Advance's sector sales activity. Process has become business building tool for company – short and long-term.
- **Mergers & Acquisitions:** Led multiple teams in the acquisitions of many small to medium size business. The typical range was \$1m to \$2M annual revenue business. Our business model from 1995 to 2013 was to purchase many of our customers and roll them into corporate stores. Typically, they were Asset Value Acquisitions. Success includes work with the seller to legally minimize or delay the tax for both parties. Small business leadership includes purchasing a 6-store group in western North Carolina.
- **P&L Management:** Managed a P&L for 30 years. Understand small and large operations and financials for any successful company, division or small business. Experience includes approving annually company sponsored bank loans. Multiple customers use current financing. During my approval process I work closely with finance staff to put packages and approvals together with detailed financial including a P&L projection, including expert advice and preparation/analysis of balance sheet.
- **Product Development/Marketing/Vendor/Store Owner Connections:** Currently significantly involved with merchant staff to support Advance's network. Help lead the company's four brands and four associated supply chains. Work closely with all for availability and pricing, successfully channeling input comes from Carquest store owners. Created critical, original input from store owners that has directly led to highly effective and improved sales, products and pricing throughout the entire US operations. Create and nurture the powerful vendor initiatives associated with all store owner and business interactions.

CORE COMPETENCIES THAT CREATE COMPETITIVE ADVANTAGE

- | | |
|--|--|
| ▪ Budget/P&L / Fiscal Management | ▪ Mergers & Acquisitions |
| ▪ Strategic Partnerships & Stakeholder Relationships | ▪ Strategic Business Planning & Organization |
| ▪ New Business Development / Sales Growth | ▪ Merchandising / Inventory Management |
| ▪ Customer Service Relationship Management | ▪ Start-Ups / Entrepreneurship |
| ▪ Solution Oriented Problem Solving | ▪ Leadership / Training / Team Building |



SHIPMAN NORTH CUTT

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PROFESSIONAL EXPERIENCE & NOTABLE CONTRIBUTIONS

MULTIPLE PARTNERSHIPS | Raleigh-Durham, NC

05/2016 - Present

EQUITY PARTNER

SCOPE: Equity Partner in Fulton Funds LLC, South Loop Properties and Northcutt Investments LLC.

- *Fulton Fund 1 LLC* is a California company with three partners. Company buys existing small to medium size multi-unit apartment buildings in select markets. Refine buildings and supervise commercial upfit changes within the facility; this work raises the income streams to market value then the partnership decides to keep the property or sell it depending on the CAP rate and/or Cash flow.
- *South loop Properties LLC* is a Georgia based company. This company maintains one commercial income producing property. Personally, serve as one of two partners. The purpose of this separate LLC is primarily established for estate planning.
- *Northcutt Investments LLC* is a Georgia based company. Serve as one of two partners in this property. Collaboratively worked and found an A class tenant and entered a long-term lease. Located the land, built/project managed the building, and secured the financing for the property in 2014.
- *Henderson Nevada:* personally own this residential property for income and long term appreciation.

CARQUEST AUTO PARTS | Raleigh-Durham, NC 05/2016 - Present



VICE PRESIDENT SALES

SCOPE: Serve as a Division Vice President (DVP) focused on growing the sales both organically and bring new clients into the program. Advance measures role success by an established sales plan and O/I plan created prior to the operating calendar year. Accomplish objectives through working with 30 US staff.

- Lead team of 6 direct report, 5 Sales Directors (IDS) and one Market Development Director (MDD). Each of these direct reports manage, on average, 5 Account Executives (AE's). The MDD has two Market Development Managers (MDM). Book of business is approximately \$190M, IDS \$40M, AE \$8m. MDD team is tasked with bringing in nearly \$7M (all measured as annual numbers). The \$130 BM Industry grows on average 2.5% per year and our budgets are built to on a 3.5% lift YOY. 2018 - personal region produced a 4.5% lift YOY and 2019 are on pace for a 7% lift.
- Exceeded O/I plan for 2018 and are on pace in 2019 to exceed O/I plan by 15%. Assigned regions serve approximately 350 stores owned by individual owner (some have multiple locations) with an average annual purchase rate of \$600K annually and very low churn rate in our customer base. The lifetime value of the customer is and averages \$10M+ per store.
- Lead DC level team in teaching, coaching store owners to focus on the customer. Focused on the health of network beyond the sale; this deep relationship and commitment to their business has allowed organization to troubleshoot all issues that may arise in the owner's store. These include but not limited to: AR, Margin, Expense Management, Payroll, Capitol needs and expenditures.
- Provide a full IT package that is aligned with the marketing programs provided.
- Serve and considered B2B expert, both with the existing customer and even more with new accounts. Led team in every major KPI with in the company and brought more new accounts in than any other division. Key Featured Example - landed a new customer in NJ which was the largest independent customer in the 50 years' history of Carquest (\$12M annual account that owns 9 stores) through 2019.
- Successfully anticipate and prevent problems and crises, including: slow or late payment of their COGS, general irritability and/or change in the owner's perspective and owner disengagement. Established a powerful team and created new market focused approach that has directly resulted in 87% of my team making and exceeding 2018 plan. In 2019 now 90% of my team are on course to exceed plan.
- Net New Membership Results - over last 13 rolling periods (New Members - Member Cancellations) by VP of Professional Sales and our Independent Store Sales VP. Corporate Statement: *Shipman Northcutt's team is leading the Tech Net new membership results: 59 new Tech Net stores.*

ADVANCE AUTO PARTS | Raleigh, NC

01/2012 - 03/2015



VICE PRESIDENT MARKET DEVELOPMENT

SCOPE: Held total responsibility for planning and directing marketing, communication and business development activities in alignment with and in support of company's mission, vision and goals in an endeavor to advance the reputation and overall whole of the organization.

- Provided vision and leadership for Carquest Auto Parts integrated selling and communication operations.

SHIPMAN NORTHCUTT

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OWNERSHIP EXPERIENCE & NOTABLE CONTRIBUTIONS CONTINUED

- Developed a comprehensive and proactive company-wide selling, communication and stigmatization strategy to supports the strategic goals, plans, and aspirations of the organization.
- Produced selling, communication and stigmatization methods that maximized demand for the company's products and services. Partnered with leadership to develop innovative concepts and solutions.
- Set strategy for selling, communication, advertising, and promotions to confirm that each one message emanating from the company square measured correct, consistent and gift a coherent image of the establishment and its interests.
- Supported various team of internet producers, graphic designers, project managers, selling and editorial writers, media specialists, and videographers. Offered mentorship to employees, each in terms of division strategy and skilled development.



IFIXANDREPAIR | Raleigh-Durham, NC

01/2010 – 11/2016 

MANAGING PRINCIPAL

SCOPE: Performed as strategic thought leader for the organization and clients. Held responsibility for all PS function aspects for designated responsibility area. Served as trusted advisor with and to main customers. Provided strategic guidance and entire account responsibility for PS engagements. Grew company and successfully sold equity position in 2016. Refined and adopted the operations manual, Federal Trademarks and the FDD.

- Designed and established the sales teams and entire sales process among other business needs.
- Completed store operational requirements by scheduling and managing employee hours.
- Maintained operations by coordinating and enforcing operational, and personnel policies/procedures.
- Ensured availability of merchandise and services by maintaining and ordering inventory process.
- Created powerful customers and trained business to create a customer-centric professional atmosphere; provided recommendations for problem resolution and estimates to customer for repair, replacement according to problem diagnosis and repair/replacement recommendation.
- Identified new growth and business opportunities inclusive of varied company offerings. Worked in close collaborations with Area Sales Vice President to determine and win main growth opportunities.

GORILLA GAMES FRANCHISE, LLC | Wake Forest, NC

01/2006 – 11/2016

CO-OWNER



SCOPE: Started the highly successful Gorilla Game franchise Partner in Memphis, TN. Created model and franchise. This model included writing an original SOP manual, getting the Federal Trademarks established, and established the FDD (Federal Disclosure Document), all critical in the success of the company.

- Operated autonomously in all facets of business, i.e., strategic planning, operations, merchandising, and marketing for online community; proficient in customer relations, brand positioning, revenue growth, financial management, driving operational excellence, business development, price negotiations.
- Ensured and checked the profitability of the business by operating within established guidelines and requirements for sales growth, inventory, labor and controllable costs.
- Led strong focus on customer satisfaction ratings, loyalty, and follow up; established customer-centric culture of communication and accountability resulting in top tier performance and rave industry reviews.
- Coordinated and implemented current operations game plans and company initiatives and store marketing in a profitable and timely manner.
- Conducted and provided proper staffing of the business; facilitated trainings/development of personnel.

- Ensured and checked all required programs, reports and legal documents were accurate and complete.

AIRTIME WIRELESS, LLC, Raleigh-Durham, NC

06/2004 - 12/2007

FRANCHISE OWNER

SCOPE: Established own business, negotiated the rights to the AT&T brand for North Carolina. Established vendor/marketing relationship with AT&T. Sold highly profitable ownership stake in January 2008.

- Opened 14 stores across NC identified the sites, gained approval from AT&T and negotiated multiple leases.
- Identified and purchased an operating IT system that supported all functions of the business.
- Designed store core concepts and developed the buildouts; constructed businesses on budget in each area and placed the staff. Added key levels of management with an east and west division.

EARLIER CAREER ENGAGEMENTS

VICE PRESIDENT SALES | **CARQUEST**, Raleigh, NC



SHIPMAN NORTHCUTT

EXECUTIVE NETWORKING BRIEF

SALES/MARKETING & BUSINESS DEVELOPMENT LEADER

Senior level sales and leadership professional with 25 years' experience and proven track record in business development and consulting. Primary focus is B2B development with an emphasis on Sales and Marketing. Challenges conventional thinking. Considered a leader of people specializing in directly managing multiple high-performing teams. Led company in creating new, powerful customer relationships and market opportunities that have "transcended the industry norm" for the company. Seeking to utilize my vast experience and expertise to be an integral part of a successful, forward-looking organization.

- **B2B Development:** Built a powerful, high revenue Market Development Program and field team in 2014 for the Carquest Brand. Created the Value proposition that led to complete brand and business differentiation. Traveled the entire U.S. market, hired critical staff. This work resulted in doubling new business production both in 28 months (select numbers confidential). Innovations included blending the Market Development staff into each region. In 2018, this led to the largest new business growth in the history of the brand and 2019 will exceed 2018.
- **Sales & Marketing Process Innovations:** Created enhanced the Partnership Selling Model then implemented sales process focused on these proven principles. Adapted a Six-Step Process specific to industry and taught it across all teams. This is the core framework for Advance's sector sale activity. Process has become business building tool for company – short and long-term.
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- **P&L Management:** Managed a P&L for 30 years. Understand small and large operations and financials for any successful company, division or small business. Experience includes approving annually company sponsored bank loans. Multiple customers use current financing. During my approval process work closely with finance staff to put packages and approvals together with detailed financial including a P&L projection, including expert advice and preparation/analysis of balance sheet.
- **Diverse Industry Consulting Including Real Estate:** Equity Partner in Fulton Funds LLC, South Loop Properties and Northcutt Investments LLC. and personally own residential property in Henderson NV. Fulton Fund 1 LLC is a CA company with 3 partners. Company buys existing small to medium size multi-unit apartment buildings in select markets. Refine buildings and supervise commercial upfit changes within the facility; this work raises income streams to market value then the partnership decides to keep the property or sell it depending on the CAP rate and/or Cash flow.

MULTI-DIMENSIONAL CAPABILITIES

Budget/P&L / Fiscal Management
Strategic Partnerships & Stakeholder Relationships
New Business Development / Sales Growth
Customer Service Relationship Management
Solution Oriented Problem Solving
Mergers & Acquisitions
Strategic Business Planning & Organization
Merchandising / Inventory Management
Leadership / Training / Team Building

SAMPLE RESULTS

Exceeded O/I plan for 2018 and are on pace in 2019 to exceed O/I plan by 40%. Assigned regions serve approximately 350 stores owned by individual owner (some have multiple locations) with an average annual purchase rate of \$600K annually and very low churn rate in our customer base. The lifetime value of the customer is and averages \$10M+ per store.

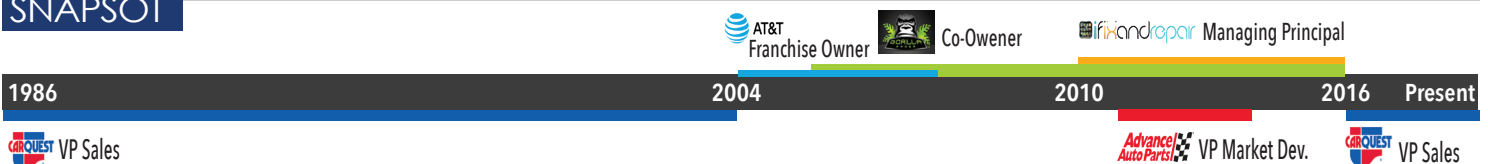
Landed a new customer in NJ which was the largest independent customer in the 50 years' history of Carquest (\$12M annual account that owns 9 stores) through 2019.

Manage book of business of approximately \$190M annually.

PROFESSIONAL DEVELOPMENT

 **NORTHWOOD UNIVERSITY**
CARQUEST SCHOOL OF BUSINESS 
Executive Program in Entrepreneurial Excellence:
Independent Store Cognate

CAREER SNAPSHOT



Profile

Benny

First Name

A

Middle Initial

Jenkins

Last Name

413 N Main Street

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

allen.jenkins0@gmail.com

Email Address

Home: (919) 426-6759

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Sales Manager

Occupation

Do you live within the town's limits or ETJ?☒ Yes ☐ No**Length of residency in Wake County**

40 Years

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

I'm a life long resident of Wake Forest and have seen it grow from a small town with a volunteer Fire Dept. and one High School to a place where people from all over the country want to come live and experience the sense of community. I have been in multiple leadership roles over my career, in differing capacities. I work well in group and team settings and enjoy the collaborative process of constructive deliberation, while always striving for the best possible outcome. I believe my personal and career experience would be well suited and of value on the planning board.

Question applies to multiple boards

[Personal_Statement.docx](#)

Upload Resume

Question applies to multiple boards

[Resume-Updated_2023.doc](#)

Upload a Personal Statement (no more than 100 words) outlining why you wish to serve of the board(s) or council you indicated

List any hobbies

I enjoy all outside activities including fishing, skeet shooting, golfing and canoeing. I have three children and am involved in their multitude of sport and church activities as much as possible. I love working in our yard with my wife and cultivating flowers and vegetables in our small backyard garden. I have very close friendships from childhood to college and always find avenues to spend valuable time with them.

Question applies to Planning Board, Board of Adjustment

I participated in the following:

☒ Neither

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Please Agree with the Following Statement

If appointed, I pledge to comply with the following ethics guidelines for advisory boards and commissions as adopted by the Wake Forest Board of Commissioners

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Any advisory board or council member may seek counsel of the Town Attorney on questions regarding the interpretation of these ethics guidelines or other conflict of interest matters. The interpretation may include a recommendation on whether or not the advisory board or council member should excuse himself/herself from voting. The advisory board or council member may request that the Town Attorney respond in writing.

Prior to being appointed to an advisory board/council, it is recommended that you attend a meeting of the advisory board/council in which you have an interest. This helps each applicant to be more aware of the work of the advisory board/council. If you have attended a meeting of an advisory board/council, please indicate the date:

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☒ I Agree

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☒ I Agree

Have you attended a meeting for the board in which you are applying?

☒ Yes ☐ No

If so, what date did you attend a meeting?

Fall of 2022

Please Agree with the Following Statement

I understand this application, including any information provided therein, may be considered a public record and as such portions may be subject to release under North Carolina General Statute Chapter 132, Public Records.

☒ I Agree

I understand that by agreeing to the above statement and typing my name below, that I am signing this application electronically.

Allen Jenkins

How did you learn about the town's advisory board openings?

☒ Other

Personal Statement

I am a third generation Wake Forest resident and other than a few years after college I have lived here. I knew when I got married I wanted Wake Forest to be where my kids grew up. I wanted them to have the same wonderful experiences I had as a child. My wife and I purchased and restored a historic house on North Main Street in 2009 and began raising our three kids. Wake Forest has been such a defining aspect of my life and success that I want to give something back. I'm friends with Chris Joyner and would often discuss his planning board experiences. While I have no specific experience in town planning, I believe my career, resume and positions held can contribute. Ultimately, I have been truly blessed to spend my life in Wake Forest and I want to give back to a place that has so positively influenced me and defined who I am as a person.

B. ALLEN JENKINS

413 North Main St. ■ Wake Forest, NC 27587 ■ 919.426.6759 ■ allen.jenkins0@gmail.com

PROFIT GROWTH ■ CUSTOMER SATISFACTION ■ MARKET PENETRATION ■ TEAM DEVELOPMENT

SELECTED SALES ACHIEVEMENTS

...Boost Mobile Prepaid Group Top Performer 2016, 2017

...Led and motivated high-achieving teams through multiple mergers and acquisitions...

...Awarded "Alltel Crest of Excellence" for 2008, honored as #1 producing Director nationwide...

...Chosen for the Alltel Accelerated Development Program, reserved for top 2% of all employees...

...Fueled \$1.3M in sales with 31 new National Accounts in less than a year for 360° Communications...

PROFESSIONAL EXPERIENCE

Willscot Corporation, Durham, NC
01/23 to Pres.

Sales Manager

Responsible for new acquisition growth, market penetration, revenue and profitability increase and customer retention in NC market. Support corporate and local market team strategies to ensure company objectives are met. Grow and cultivate relationships with large key accounts to promote additional project opportunities within market. Oversee and function as product manager on large, complex projects incorporating multiple teams and logistic control. Responsible for strategic forecasting and market plan creation to drive Key Performance Market Initiatives.

Dish, Raleigh, NC

01/14 to 10/22

04/14 to 09/22

Indirect Account Manager

Responsible for Branded Retailer Distribution Points in the Dish-Boost Prepaid space for Raleigh, NC including metric attainment in gross activations, revenue, profitability and customer retention targets for Dish-Boost Prepaid's brand. Support organizational sales and service strategies by developing tools and resources to ensure objectives are met. Communicate and oversee cross functional and companywide initiatives to include training and sales development for the dealer representatives, function as a liaison between the Boost Prepaid Group and the Dealer Principals communicating promotional offers, branding, compensation, local marketing strategies, and KPI\Revenue forecasting.

Verizon Wireless, Raleigh, NC

01/09 to 12/13

Chosen as the only retained Alltel Director in the region to provide leadership, strategic guidance, and a seamless transition experience for customers and employees during the complex acquisition.

Business Sales Manager

Collaborate with Verizon partners in the realignment and integration of staff, customers, and territories during multiphase reorganization. Oversaw training in new systems and processes without sacrificing service. Grew and retained Central and Eastern NC business market, Manage and coach 10-member Vertical sales team, including Healthcare, Life Sciences and Government instilling unified vision and dedication to excellence as change agent and advocate for success in driving KPI's and functioning as a project leader on 3rd party software and solution providers.

- Maintained key enterprise accounts and grew business despite longer ramp up curve created by restructuring the territory both horizontally and vertically, only 1 of 2 markets out of 15 required to do so.
- Captured 101% wireless achievement for 2010 and won Business Sales Manager of the month for June\July and September with 134%, 127% and 121% of wireless targets.
- Target Achievements: 2011-114% of gross targets, 2012-149% of gross targets, 2013 122% of gross targets (YTD)

Alltel Communications, Raleigh, NC

09/98 to 12/08

Targeted for fast-track potential and promoted through the ranks to head the central NC region. Over-achieved all goals for revenue, wireless units, and data sales, driving market to top 5 in country.

Director - Wireless Business Solutions (06/05 to 12/08)

Challenged to boost the Raleigh Market from top 10 performer into the top 5. Strategically analyzed territory and initiated changes to execute rapid-results. Retrained sales force to encourage a “hunter” sales mentality, replacing 50% of team within first 8 months. Managed 13 staff members, 6 statewide business agents, and \$1M budget. Consistently secured top 5 status nationwide, the only middle market represented.

- Honored with the “Alltel Crest of Excellence Award” for 2008, reserved for the top producing Director nationwide out of 28 peers. Also earned 2008 top-producing Director for the East Region.
- Chosen for the Alltel Accelerated Development Program by board of company executives. Passed strict selection criteria as a top 2% achiever, and slated for rapid succession into upper management.
- Exceeded or met every key performance sales indicator month after month, during entire 3-year tenure. Recognized as the most consistent and best performing market in the region.
- Surpassed 2008 targets for wireless units (121%), revenue (132%), and captured an overall 191% increase in revenue achievement from 2005 to 2008. Raised market penetration 9% year over year.

Director - Wireless Business Solutions continued...

- Stabilized a committed team, lowering employee turnover to 5%, well below regional average of 11-15%.
- Developed State of NC account 21% year over year to a top 5 customer for Alltel nationwide. Assigned a primary sales representative that cultivated stronger relationship with key stakeholders.
- Closed premier accounts including Duke University Hospital, Salix, BioVentus and Wake Medical Center.
- Restructured sales team and territory in support of aggressive, profitable growth and deeper penetration.
 - Piloted the dedicated account representative model, allowing team to obtain subject matter expertise.
 - Welcomed business agents as partners instead of competitors, garnering untapped opportunities.
 - Changed mix of activity from predominantly account management to new business acquisition.

Director - Wireless Business Solutions (05/03 to 06/05), Wilmington, NC

Headed daily operations and management of a business sales, customer service, and sales support group covering a tier 2 market. Hired, coached, and developed the business sales team and business agent team to promote and sell solution-based products to the existing customer base and prospective business customers.

- Earned the “Alltel Crest of Excellence Award” for 2007 as the nationwide top producing Director.
- Expanded market penetration 6% and produced 118% of revenue and 112% of wireless unit goals.

Business Sales Manager (08/98 to 05/03), Rocky Mount, NC

Facilitated the wireless and business long distance sales objectives for the corporate environment in Northeast NC, including bid and contract preparation. Drove revenue and wireless unit targets through new account acquisition, penetration, and retention. Coached and mentored the sales team.

****Held National Accounts Marketing Analyst and Key Account Representative positions from 01/95 to 03/97***

Building Business Acumen
The 5 Elements of Business
Axiom Professional Sales Process Certificate in Solution Sales
United Arts Council Raleigh Board of Directors
Proficient in utilization of Salesforce.com and MS Office Products

**BA in Business Management, Major: Marketing, North Carolina State
University, Raleigh, NC,**

Profile

Adam

First Name

Redler

Last Name

131 Kullana Lane

Street Address

Suite or Apt

Wake Forest

City

NC

State

27587

Postal Code

adam.redler@gmail.com

Email Address

Mobile: (516) 695-9416

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Planning Board: Submitted

Engineer

Occupation

Do you live within the town's limits or ETJ?☒ Yes ☐ No**Length of residency in Wake County**

2.5 years

Interests & Experiences

Question applies to multiple boards

Please list any experience and/or other factors supporting your candidacy

I am a licensed engineer, with experience planning, designing, and executing projects ranging from thousands to millions of dollars in value.

Question applies to multiple boards

[Redler_Resume.pdf](#)

Upload Resume

Question applies to multiple boards

[Personal_Statement.docx](#)

Upload a Personal Statement (no more than 100 words) outlining why you wish to serve of the board(s) or council you indicated

List any hobbies

Soccer coaching, archery, hunting, woodworking.

Question applies to Planning Board, Board of Adjustment

I participated in the following:

☒ Neither

Ethics Guidelines for Town Advisory Boards and Councils

Please Agree with the Following Statement

If appointed, I pledge to comply with the following ethics guidelines for advisory boards and commissions as adopted by the Wake Forest Board of Commissioners

☒ I Agree

Members of advisory boards and councils shall not discuss, advocate or vote on any matter in which they have a conflict of interest or an interest which reasonably might appear to be in conflict with the concept of fairness in dealing with public business. A conflict of interest or a potential conflict occurs if a member has a separate, private or monetary interest, either direct or indirect, in any issue or transaction under consideration. Any member who violates this provision may be subject to removal from the board or council.

If the advisory board or council member believes he/she has a conflict of interest then that member should ask the advisory board or commission to be recused from voting. The advisory board or council should then vote on the question on whether or not to excuse the member making the request. In cases where the individual member or the advisory board or council establishes a conflict of interest, then the advisory board or council member shall remove themselves from the voting area.

Any advisory board or council member may seek counsel of the Town Attorney on questions regarding the interpretation of these ethics guidelines or other conflict of interest matters. The interpretation may include a recommendation on whether or not the advisory board or council member should excuse himself/herself from voting. The advisory board or council member may request that the Town Attorney respond in writing.

Prior to being appointed to an advisory board/council, it is recommended that you attend a meeting of the advisory board/council in which you have an interest. This helps each applicant to be more aware of the work of the advisory board/council. If you have attended a meeting of an advisory board/council, please indicate the date:

Please Agree with the Following Statement

Per NCGS 160C-109, members of appointed boards shall not vote on any advisory or legislative decision regarding a development regulation adopted where the outcome of the matter being considered is reasonably likely to have a direct, substantial, and readily identifiable financial impact on the member. An appointed board member shall not vote on any zoning amendment if the landowner of the property subject to a rezoning petition or the applicant for a text amendment is a person with whom the member has a close familial, business, or other associational relationship. A member of any board exercising quasi-judicial functions shall not participate in or vote on any quasi-judicial matter in a manner that would violate affected persons' constitutional rights to an impartial decision maker. Impermissible violations of due process include, but are not limited to, a member having a fixed opinion prior to hearing the matter that is not susceptible to change, undisclosed ex parte communications, a close familial, business, or other associational relationship with an affected person, or a financial interest in the outcome of the matter. A "close familial relationship" means a spouse, parent, child, brother, sister, grandparent, or grandchild. The term includes the step, half, and in-law relationships.

☒ I Agree

Please Agree with the Following Statement

Code of Conduct: When participating in a meeting or conducting Town business (whether in person, via email, or other communication method), board and commission members shall conduct themselves in an ethical and professional manner. Any board or commission member who engages in inflammatory, hostile or threatening language or behavior toward others, including but not limited to elected officials, staff or another board or commission member, will be removed from the meeting. Any member who engages in the aforementioned behavior is also subject to dismissal from the Board. I understand that that board and commission appointments serve at the pleasure of Board of Commissioners and may be removed from an appointed board or commission at the discretion of Board of Commissioners. Meeting Preparedness to successfully prepare for a meeting, then you will be provided agenda materials in advance. An unprepared board or commission member reflects poorly on the Town of Wake Forest as well as fellow board or commission members since questions asked are often found in the staff report. Any member who continually comes unprepared to meetings is subject to dismissal from the Board. Dress Code Board members are expected to be well groomed, cleaned, and dressed in business casual attire. Shorts, t-shirts, and jeans are not permitted. If a Planning Board member is dressed or groomed inappropriately for a meeting, work session, or a Comprehensive Plan workshop, they will be prevented from participating and counted as absent

☒ I Agree

Have you attended a meeting for the board in which you are applying?

☐ Yes ☒ No

If so, what date did you attend a meeting?

Please Agree with the Following Statement

I understand this application, including any information provided therein, may be considered a public record and as such portions may be subject to release under North Carolina General Statute Chapter 132, Public Records.

☒ I Agree

I understand that by agreeing to the above statement and typing my name below, that I am signing this application electronically.

Adam Redler

How did you learn about the town's advisory board openings?

☒ Town website

ADAM REDLER, PE

131 Kullana Lane, Wake Forest, NC 27587
(516) 695-9416 – Adam.Redler@gmail.com

Professional Experience

Eaton – January 2021 to Present

Raleigh, NC

Data Center Solutions

Lead Project Engineer; Senior Project Engineer

- Lead for team designing MW-class battery energy storage system (BESS) for US market
- Responsible for ensuring BESS compliance with UL9540, UL50, NFPA855, NEC; primary point-of-contact for UL and TUV-R
- Perform system integration for xStorage 400 BESS, including design, manufacturing, testing, and field support
- Provide project management and engineering support to deliver custom 3-phase uninterruptible power supply (UPS) systems

Naval Nuclear Laboratory – August 2011 to December 2020

Niskayuna, NY

Future Power Plants

Lead Engineer

- Supervise and track work performed by analysis & integration unit
- Review work completed by unit for technical correctness, clarity, and requirements compliance
- Responsible for application of project management principles to develop integrated plans to ensure the scope of complex assignments are clearly defined, stakeholders are informed, and milestones are executed on-time
- Directly interface with shipyard and US Naval Sea Systems Command to communicate complex engineering concepts
- Mentor junior engineers in nuclear power plant mechanical systems
- Chairperson for COLUMBIA Class nuclear propulsion plant hazards assessment
- Lead author for plan to re-align over \$100M of near-term DOE research & development funding to prioritize technologies with the biggest potential benefit to the future US Navy
- Led integrated product team for nuclear valve development
- Led successful effort to commence development of new reactor plant valve; required integration between multiple disciplines and organizations and a balance of system performance characteristics and cost reduction opportunities; initiated new material qualification to reduce risk of reference valve design
- Assisted with the development of plans for future nuclear propulsion technology development spanning multiple decades

S6G Moored Training Ship Conversion Project

Senior Engineer, Intermediate Engineer, Associate Engineer

- Applied systems engineering methodology to design mechanical systems necessary to convert decommissioned nuclear submarines into training platforms for US Navy nuclear operators
- Led certification of completion for >\$100M submarine module and authorization to turnover ownership from commercial shipyard to government shipyard; this effort required partnering between Laboratory personnel, commercial & government shipyard engineers, and US Naval Sea Systems Command

ADAM REDLER, PE

- Led diverse group of engineers to complete first-of-a-kind design basis procedure to ensure long term reactor plant decay heat removal; included design review
- Co-lead for production of new reactor plant manual used by sailors to operate and maintain nuclear propulsion system
- Prepared compliance checklists for 10CFR50 and NAVSEA design standards
- Primary Laboratory point-of-contact for NPTU Charleston military construction project design process; coordinated review of fluid system designs for compliance with design requirements
- Developed and delivered in-person design school to train crew of MTS701
- Participated on team to identify legacy hazardous material, requiring survey of entire Laboratory campus
- Teamed with reactor safety organization for two first-of-a-kind safety assessments
- Evaluated and approved shipyard developed products to ensure requirements were met in a comprehensive but cost-effective fashion
- Analyzed piping systems for flow, temperature, and pressure

Freelance Professional Engineer – May 2019 to December 2020

NY Capital Region

- Inspect and disposition structural concerns in homes & outbuildings identified by home inspectors, homeowners, and contractors

Power Management Concepts – August 2009 to August 2011

Bethpage, NY

Mechanical Engineer

- Provided mechanical and electrical design services for data center clients
- Lead for commissioning of mechanical infrastructure at client data center
- Developed script and executed shutdown maintenance period
- Commissioned 250kW rooftop solar system
- Performed whole building energy modeling using eQuest software
- Performed facility management for the Morrelly Homeland Security Center
- Prepared technical documents including proposals, RFQs, and AutoCAD drawings

Education

M.S. Mechanical Engineering, Union Graduate College

Schenectady, NY

Graduation Date: June 2015

B.S. Mechanical Engineering, Math Minor, Hofstra University

Hempstead, NY

Graduation Date: December 2009

Additional Information

Licensed Professional Engineer, North Carolina & New York

Held federal security clearance 2011-2020

Re: Personal Statement

Hello,

I wish to serve on the Town of Wake Forest Planning Board because, as an ETJ resident, I have a vested interest in the future of the town. I believe my professional experience as an engineer is a benefit to the board. I first visited Wake Forest in 2018, moved my family here in 2021, and have grown extremely fond of the town. My son attends Richland Creek Elementary School, and I am looking to better understand and contribute to the development of the town. I appreciate the Board's consideration.

Adam Redler



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-192-

Submitted by: Timothy Richards

Submitting Department: Planning

Meeting Date: September 19, 2023

SUBJECT

Consideration of LEGISLATIVE CASE RZ-23-01, 4Rivers - Wake Forest Self Storage, a conditional rezoning filed by Rob Caudle on behalf of Franklin Village, LLC, to rezone 2.64 acres located at 0 Friendship Chapel Road, being Wake County Tax PIN 1850066925, from General Residential 10 (GR10) to Highway Business Conditional District (HB-CD).

Recommendation:

Item Summary:

ATTACHMENTS

-



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-224-

Submitted by: Aileen J. Staples

Submitting Department: Administration

Meeting Date: September 19, 2023

SUBJECT

Consideration of a resolution authorizing the filing of an application for approval of a financing agreement authorized by NC General Statute 160A-20 (Street Resurfacing)

Recommendation:

Approval as submitted

Item Summary:

ATTACHMENTS

- [160A-20 Application _summary.pdf](#)
- [Draft Timetable _Streets IPA.pdf](#)
- [Resolution 2023-xx _Authorizing Application _Street Financing.docx](#)

Consideration of approval of resolution authorizing the filing of an application for approval of a financing agreement authorized by NC General Statute 160A-20 (Street Resurfacing)

Summary: The Engineering team along with consultants have completed design for year one of the street rehabilitation and resurfacing project. Bids for construction are underway and will be presented for the Board's consideration in October. Year/phase one (part of \$18 million three-year program) of this project will be funded utilizing an installment purchase agreement as authorized by NC General Statute 160A-20. The Town will borrow up to \$6,500,000 to fund this project. The attached resolution authorizes staff to proceed with formal application to the Local Government Commission to proceed with the financing. Debt service is included in the FY 2023-2024 Budget.

Attachments: Timetable; Resolution

TOWN OF WAKE FOREST STREET RESURFACING FINANCING (160A-20) TIMETABLE

Preliminary Conference with LGC	August 11, 2023 (Friday)
*Adoption of Resolution Authorizing Application	September 19, 2023 (Tuesday) (Prior to filing application)
File notification with Joint Legislative Committee	September 30, 2023 (Friday)
Publish Notice of Public Hearing (Ten days prior)	October 5, 2023 (Thursday)
Public Hearing on Financing	October 17, 2023 (Tuesday)
Proposals due from Financial Institutions	November 1, 2023 (Wednesday)
File formal application with LGC	November 7, 2023 (Tuesday)
Approval of Resolution Authorizing 160A Installment Purchase Contract with Financial Institution (<i>if needed</i>)	November 21, 2023 (Tuesday)
Application considered by the LGC	December 5, 2023 (Tuesday)
Close loan/receive installment proceeds (Between December 15 and December 29)	December 2023

*This resolution also authorizes staff to “take other such actions as may be advisable in connection with the proposed financing agreement.”

RESOLUTION 2023-

RESOLUTION AUTHORIZING THE FILING OF AN APPLICATION FOR APPROVAL OF A FINANCING AGREEMENT AUTHORIZED BY NORTH CAROLINA GENERAL STATUTE 160A-20

WHEREAS, the Town of Wake Forest (the "Town") proposes to undertake extensive resurfacing and rehabilitation of Town owned streets over the next three years to better serve the citizens of the Town of Wake Forest; and

WHEREAS, the Town desires to finance a significant portion of this project by the use of an installment contract under N. C. General Statute 160A, Article 3, Section 20; and

WHEREAS, finding of fact by this governing body must be presented to enable the N. C. Local Government Commission to make its findings of fact set forth in N. C. General Statute 159, Article 8, Section 151 prior to approval of the proposed contract;

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Town of Wake Forest, North Carolina as follows:

1. The proposed improvements to be financed consist of resurfacing and rehabilitation of certain Town streets to preserve the life of said streets.
2. Due in large measure to the Town's significant growth, the Town recognizes that bringing all streets to a higher standard and to preserve the infrastructure is expected by the citizens of Wake Forest. This project has been identified in the Town's annual Capital Improvements Plan as a high priority.
3. The proposed installment contract will fund year one of this program and supplement planned G.O. Bond for future phases of this project. The installment contract is preferable to issuing G.O. Bonds as follows:
 - a. Current appropriations in the Town's operating budget are inadequate to fund these improvements.
 - b. Currently, fund balance available for appropriation and capital reserve amounts are not sufficient to fund this project.
 - c. The Town does not retire enough debt annually to fund these projects using the "two-thirds limitations" at this time.

RESOLUTION 2023-

RESOLUTION AUTHORIZING THE FILING OF AN APPLICATION FOR APPROVAL OF A FINANCING AGREEMENT AUTHORIZED BY NORTH CAROLINA GENERAL STATUTE 160A-20

4. The proposed financing is an amount not to exceed \$6,500,000 for the proposed improvements. This amount is adequate and is not excessive. The construction bids are expected to be received and approved by the Board of Commissioners by October 17, 2023.
5. Examination of the audit reports for the past three (3) fiscal years of the Town of Wake Forest will reflect that the Town's debt management policies are in strict compliance with North Carolina law.
6. The Town has earmarked a portion of the vehicle fee and it is set aside in a debt service fund along with designated tax revenues for the repayment of debt service associated with this financing. It is anticipated that a tax rate increase will be not be needed.
9. The Town is not in default in any of its debt service obligations.
10. The Town Attorney will render an opinion that the proposed project is authorized by law and is a purpose for which public funds may be expended pursuant to the construction and laws of North Carolina.
11. The Assistant Town Manager/Chief Financial Officer (CFO) is hereby designated and authorized to obtain financing proposals for the project and award bid to respective financial institution.
12. The Town Manager and Assistant Town Manager/CFO are hereby authorized to execute and approved financing documents with respective financial institution.
13. The Town intends that the adoption of this resolution will be a declaration of the Town's official intent to reimburse expenditures for the project that is to be financed from the proceeds. The Town intends that funds have that have been advanced, or that may be advanced, from the Town's general fund, or any other Town fund related to the project, for project costs may be reimbursed from the financing proceeds.

NOW, THEREFORE, BE IT FURTHER RESOLVED that the Town Manager and the Assistant Town Manager/CFO of the Town are hereby authorized to act on behalf of the Town as said representatives to file an application for approval with the Local Government Commission of North Carolina and are authorized to take other such actions as may be advisable in connection with the proposed financing agreement.

Duly adopted this the 19th day of September 2023.

Vivian A. Jones
Mayor

(ATTEST)

Theresa Savary
Town Clerk



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-250-

Submitted by: Brad West

Submitting Department: Planning

Meeting Date: September 19, 2023

SUBJECT

Approval of a Resolution to Support Development of the S-Line Rail Corridor and to Provide Local Funding to Match a Federal Grant Opportunity for Mobility Hub Design and Project Development Activities

Recommendation:

Approve

Item Summary:

ATTACHMENTS

- [2023-250 Agenda Summary BoC.pdf](#)
- [RCN_Grant_Draft_Resolution__3_.doc](#)

Agenda Item: Resolution to Support Development of the S-Line Rail Corridor and to Provide Local Funding to Match a Federal Grant Opportunity for Mobility Hub Design and Project Development Activities

Summary: NCDOT is preparing an application for the North Carolina S-Line Mobility Hub Program to assist communities along the S-Line with the next major milestone for mobility hubs and prepare for passenger rail. Each community is at a different phase in the process and this Program proposes to get all communities to at least shovel-ready (through final design). The application will be for planning, design and capital construction funds. **For Wake Forest, the tasks included in the proposed Program include Final Design, ROW Acquisition, and Construction.**

Based on the requirements of the grant program, Wake Forest is required to provide a 20% funding match. Specifically, the Town of Wake Forest would contribute \$3,300,000 to receive \$13,200,000 in federal funding towards planning, design, and infrastructure construction costs related to station area improvements within Wake Forest, totaling \$16,500,000. These funds would be separate from track realignment and grade separation infrastructure elsewhere along the S-line corridor.

Funds would need to be fully obligated by September 30th, 2026, with increments for planning and design work obligated prior to September 30th, 2026, as to be determined.

Attachments: None

RESOLUTION 2023-XX

RESOLUTION TO SUPPORT DEVELOPMENT OF THE S-LINE RAIL CORRIDOR AND TO PROVIDE LOCAL FUNDING TO MATCH A FEDERAL GRANT OPPORTUNITY FOR MOBILITY HUB DESIGN AND PROJECT DEVELOPMENT ACTIVITIES

WHEREAS, the North Carolina Department of Transportation (NCDOT) has a long tradition of progressing successful passenger and freight rail projects and supporting the development of rail infrastructure; and

WHEREAS, NCDOT has worked with state, regional, and federal partners to develop plans for the federally-designated Southeast Corridor (“S-Line”), a passenger and freight rail network extending from Washington, D.C. through North Carolina to Jacksonville, Fla.; and

WHEREAS, a Record of Decision to develop the Raleigh to Richmond portion of the Southeast Corridor was approved by the Federal Rail Administration (FRA) on March 2017, in accordance with the National Environmental Policy Act; and

WHEREAS, the development of the S-Line corridor supports and promotes economic development in communities along the corridor, including those in rural areas; and

WHEREAS, the developed S-Line would provide greater access to jobs, health care, and education and provide new options for the movement of both goods and people; and

WHEREAS, the developed S-Line would provide efficient and reliable commuting options for communities and businesses along the corridor; and

WHEREAS, NCDOT is working with communities along the S-Line to plan stations, mobility hubs, infrastructure needs, and other land use considerations to prepare for rail service and maximize mobility options in each community; and

WHEREAS, NCDOT and communities along the S-Line corridor are pursuing a federal Reconnecting Communities and Neighborhoods (RCN) grant opportunity to design and construct mobility hubs and associated connections to improve access for residents and visitors; and

WHEREAS, communities participating in the RCN grant application must provide a local 20% match (\$3,300,000) for their portion of the grant application.

BE IT RESOLVED that the governing body of the Town of Wake Forest hereby authorizes the Town Manager to commit \$3,300,000 as the 20% match for the grant and supports further design and construction efforts of the S-Line rail corridor, including mobility hubs and related infrastructure needs.

Duly adopted this 19th day of September 2023.

(ATTEST)

Vivian A. Jones
Mayor

Theresa Savary
Town Clerk



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-56-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: September 19, 2023

SUBJECT

Department Monthly Report

Recommendation:

Item Summary:

ATTACHMENTS

- [August 2023 Monthly Report.pdf](#)

August 2023 | Department Monthly Report

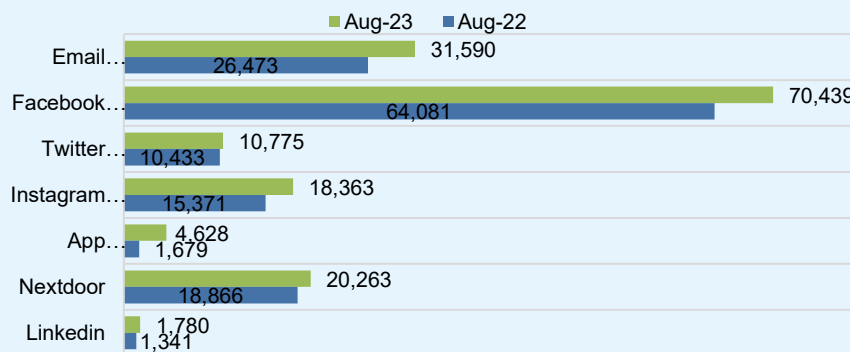


Communications

ANNOUNCEMENTS	
Media Releases	44
Email Announcements	20
Town-to-Resident Phone Calls/Texts	0

TOP 5 VIEWED PAGES ON WEBSITE		
RANK	PAGE	VIEWS
1	Home	12,033
2	Forms & Applications	8,949
3	Friday Night on White	6,701
4	Holding Park Aquatic Center	6,643
5	Utility Bill Payment Options	3,319

SUBSCRIBERS



Downtown Development

OCCUPANCY		
	JULY-SEPT 2023	JULY-SEPT 2022
Occupancy Rate in Percentage	93%	89%

NEW BUSINESSES		
	AUGUST 2023	FISCAL YEAR-TO-DATE
Number of New Businesses	1	1
Number of Businesses Closed	0	0

EVENTS		
FOURTH QUARTER EVENTS (APR - JUNE)	ATTENDANCE IN 2022	ATTENDANCE IN 2023
August 11 FNOW	13000	10000

UPDATES PROVIDED QUARTERLY

Several façade improvement grant applications have been reviewed and approved for decorative lighting projects at W Chamber of Commerce, decorative lighting and other exterior improvements at BroadSides & Brews, new awning at Southern Suds & Gifts, and decorative lighting replacement from B&W Hardware to Shorty's Famous Hot Dogs.

Issues with unsupervised teens appeared to improve at August FNOW with increased police presence both inside the event area and outside the event perimeter. Plea to parents to supervise their children via the website, social media, and press release helped bring awareness to the issue.

WFD, Inc. is partnering with the Public Art Commission for public art banners to be displayed January through March 2024 and a Call to Artists will be issued in September.

The occupancy rate improved with the expansion of Page 158 and the relocation of The Lemon Tree Café into this new space. The opening of this location puts the Renaissance Plaza at 100% occupancy. The Burger Shop has assumed the lease of the previous Lemon Tree location with plans to offer an additional lunch option (soup and salad).

The Downtown Development Director attended the NC Main Street Director's Meeting in Elkin, NC August 1-3, 2023, where the focus was on the new Main Street America Accreditation standards and the NC Main to Main trail.

Economic Development

WFBIP MONTHLY NEWSLETTER [VIEW](#)

The Wake Forest Business & Industry Partnership's Quarterly Report is updated at the end of each quarter.

Use Chrome, Firefox, Safari, or Edge to view the newsletter and/or the report.

REQUESTS FOR INFORMATION (RFIs)

	AUGUST 2023	AUGUST 2022
Number of Responses to RFIs	1	0

BUSINESS RETENTION & EXPANSION

NAMES OF BUSINESSES VISITED THIS MONTH

The Loading Dock

AutoMax

Engineering

PROJECT	UPDATE
Stormwater Infrastructure	The Stormwater Utility Advisory Group is hoping to finalize the board recommendations at the September 6 th meeting. The Engineering Department will continue to provide updates on the group's progress and timeline for Board approval.

Finance

FINANCIAL TASKS COMPLETED

TAX RETURNS & REPORTS	COMPLETION DATE
NC Sales and Use Tax Form E500 and payment	8/16/2023
ORBIT/LGERS Report – NC State Treasurer	8/1/2023
Utility Sales Tax Return – E500 E	8/16/2023
BLS Department of Labor Report	8/22/2023
Gross Receipts Tax report	8/16/2023
Food & Beverage Tax Report	8/16/2023
ACCOUNTING/FINANCE	AMOUNT
Total \$ Accounts Payable Disbursement	\$3,089,690
Total ePayables & Payroll Disbursement	\$2,762,525
Total Number of Invoices Paid	538
Total Amount of Invoices Paid with credit card	\$701,653
FY 2022-2023 Audit	COMPLETION DATE
Staff workers and draft statements have been submitted. Fieldwork and ACFR draft are in process.	Early October 2023

PURCHASING / WAREHOUSE

Purchase Orders Processed	88
New Vendors Set Up	19
Informal Quotes	24
Surplus Items	\$17,875 sold
HUBSCO	0 reports submitted

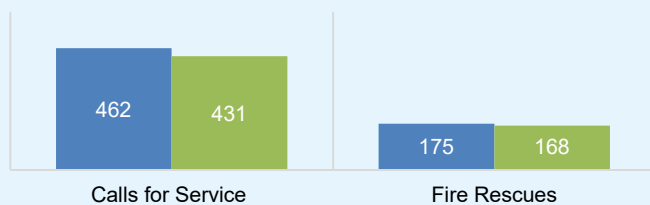
Fire

KEY STATS

	AUGUST 2023	AUGUST 2022
Calls for Service	462	431
Average Response Time	4m:43s	4m:20s

FIRE-KEY STATS

■ Aug-23 ■ Aug-22

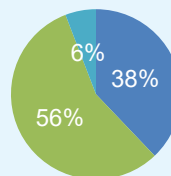


TYPES OF CALLS

	AUGUST 2023	AUGUST 2022
Fire	175	168
Medical	260	239
Motor Vehicle Accidents (MVA)	27	24

TYPES OF CALLS

■ Fire ■ Medical ■ MVAs



Human Resources

PROMOTIONS / TRANSFERS

EMPLOYEE NAME	DEPARTMENT	POSITION	DATE
Kameron Abshire	Police Department	Police Corporal	08/06/2023

EMPLOYMENT

As of August 31, 2023	AUGUST 2023	AUGUST 2022
Positions Filled	402	373
Vacancies	38	38
Total Authorized Positions FY 2023-2024	440	411

Information Technology

SERVICE STATS

	AUGUST 2023	AUGUST 2022
Service Requests Completed	445	353
Network Uptime Percentage	100%	99%

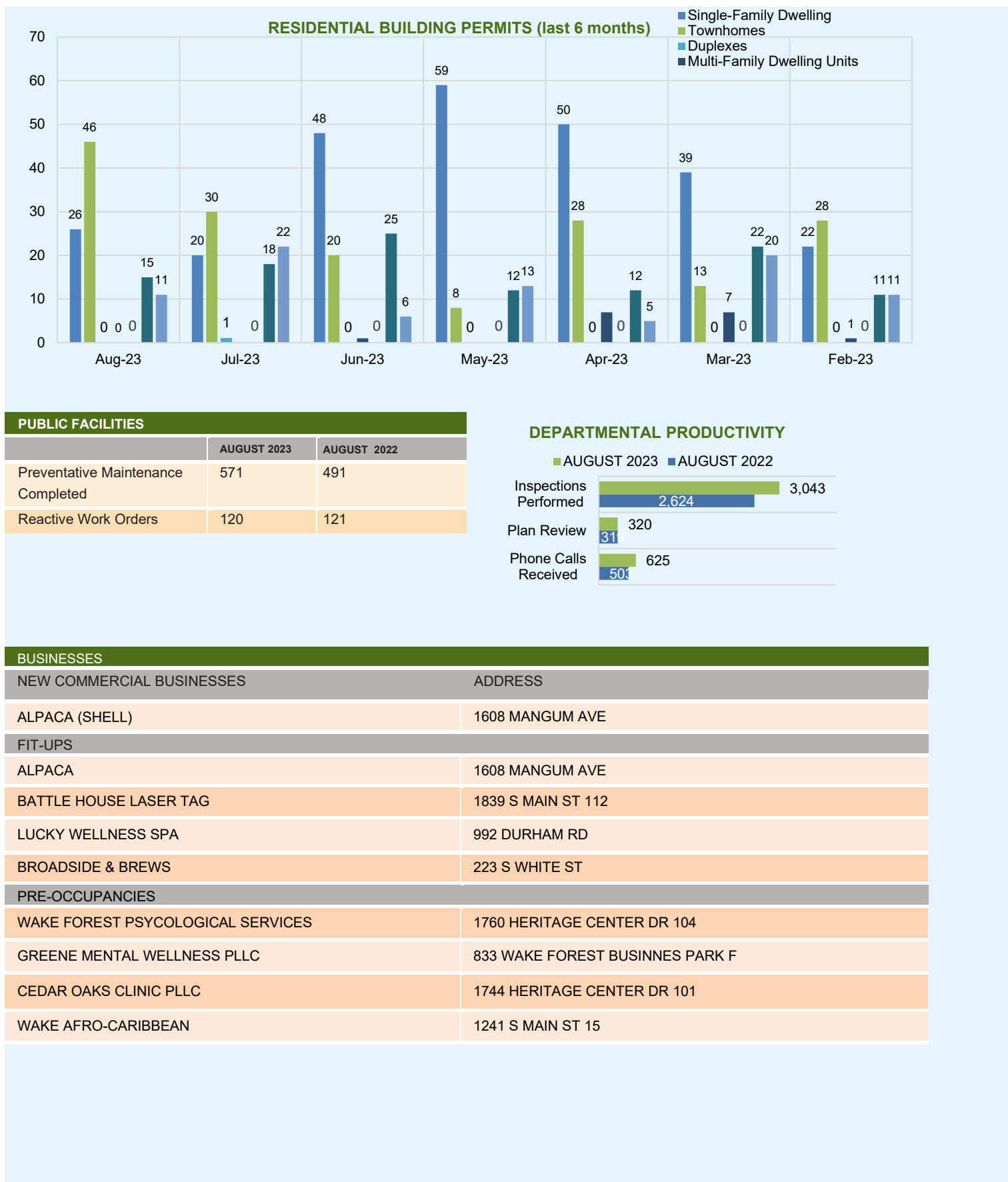
Inspections & Public Facilities

RESIDENTIAL PERMITS

	AUGUST 2023	AUGUST 2022
Single-Family Dwelling	26	33
Townhomes	46	25
Duplexes	0	0
Multi-Family Dwelling Units	0	0
Other	208	158
Total	280	216

NON-RESIDENTIAL PERMITS

	AUGUST 2023	AUGUST 2022
New Commercial	1	0
Fit-Ups	4	2
Other	34	33
Total	39	35



Organizational Development

NORTHERN WAKE FOOD SECURITY TEAM

Staff Hours	12 hours per week
Updates	Mobile Food Truck meeting with Ripe Revival

Parks, Recreation & Cultural Resources

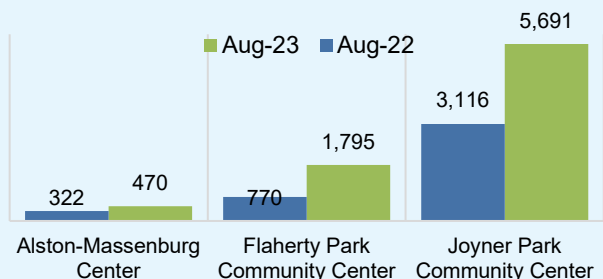
ATHLETICS

	AUGUST 2023	AUGUST 2022
Registrations Received – Youth	14	22
Registrations Received – Adult	2 teams	8 teams
Games Held	61	59
Revenue	\$1,560	\$2,000

PROGRAMS

	AUGUST 2023	AUGUST 2022
Registrations Received – Youth	103	476
Registrations Received – Adult	216	2,856
Classes/Programs Held	30	35
Revenue	\$6,045	\$12,475.75

VISITORS TO COMMUNITY CENTERS



RECONNECT PROGRAM GUIDE [VIEW](#)

The program guide is updated twice per year in January and July.

PARK MAINTENANCE

TYPE OF MAINTENANCE	QUANTITY
Vandalism	3
Reactive Maintenance	8
PM Inspections and services	73
Evening and Weekend Park Services	4

FACILITY RENTALS

	AUGUST 2023	AUGUST 2022
Athletic Fields	12	32
Joyner Park Outdoor / Open Space	2	2
General Outdoor / Open Space	1	0
Picnic Shelters	6	7
Wake Forest Community House	9	3
Joyner Park Community Center	3	7
Flaherty Park Community Center	0	2
Alston-Massenburg Community Center	4	4

VISITORS TO AQUATIC CENTER & SPRAYGROUND

	AUGUST 2023	AUGUST 2022
Aquatic Center	4,973	4,368
Taylor Street Sprayground	3,053	1,651

Planning

DEVELOPMENT SERVICES MONTHLY REPORT

VIEW

ZONING VIOLATIONS DASHBOARD

VIEW

Use Chrome, Firefox, Safari, or Edge when viewing the dashboard.

CERTIFICATES OF APPROPRIATENESS		
	AUGUST 2023	AUGUST 2022
COAs Received	1	1
COAs Approved	0	1

Police

KEY STATS		
	AUGUST 2023	AUGUST 2022
Calls for Service	3,739	4,994
Vehicle Crashes	195	170

Public Works

Streets:

- Juniper Culvert Repairs
- Crosswalk improvements at Federal House Ave and Quatrefoil St
- Repaired 362 feet of Sidewalk
- Patched 123.07 tons of Asphalt
- Swept 292 miles of streets
- Pavement marking project Traditions Grande Blvd and Heritage Club Dr
- Assisted with Friday Night on White
- Assisted Jeanette with DOT clean-up

Solid Waste:

- A new employee, Jason Utley started on 8/21/23.
- Highway cleanup along HWY 98 was a success on 8/23/23.
- One heavy storm left much debris, but yard waste services were able to stay on schedule.
- August was very hot overall, and we worked diligently to keep crews hydrated and safe. We gladly had no concerns.

Fleet:

- Fleet completed 248 work orders in August for a combined shop productivity average of 83% of billable hours.
- The 4 mechanics completed 23.1 combined hours of training.
- With the looming UAW (Big 3) strike with their expiring contracts on 9/14/23
- Fleet has increased our normally stocked parts inventory that only the manufacturer can supply. Currently, the projection is Fleet will be self-sustained for a minimum of 60 days.

Urban Forestry:

- 22 storm work jobs
- Assisted Jeanette with DOT clean-up
- Sprayed invasive species at the dam

RECYCLING		
	AUGUST 2023	AUGUST 2022
Volunteer Collected Litter	75	75
Volunteer Collected Recycling	75	0
Volunteer Hours	6	16
Volunteer Miles of Streets	0	0
Sections of Roads Cleaned (not	1	0
Number of Creeks Cleaned	1	1
Number of Litter Kits Issued/Returned	3	1

SOLID WASTE		
	AUGUST 2023	AUGUST 2022
New Construction Homes Added	62	69
New Cart Sets	62	69

CEMETERY		
	AUGUST 2023	AUGUST 2022
Number of Plots Sold	0	5
Number of Niches Sold	2	0
Total Plots Available	0	51

EVENT & PROGRAM ATTENDANCE

	AUGUST 2023	AUGUST 2022
Monthly In-Person Attendance	2,117	2,157
Virtual Views	354	31
Ticketed Events Held	2	1
Free Events Held	2	0

RENAISSANCE CENTRE PROGRAM GUIDE

[VIEW](#)

The Renaissance Centre, in partnership with The Wake Forest Guild of Artists, hosted a community art show reception on August 16. The show featured 52 pieces of work with the theme of *Apron Strings: Ties to the Past*. The art exhibit was on display for the month of August.

The Mystery Dinner Theater shows continue to be very popular with our audiences. This year the Centre added a matinee show to accommodate the demand for tickets. Both the matinee and the evening performances of "A Brush with Death" SOLD OUT the

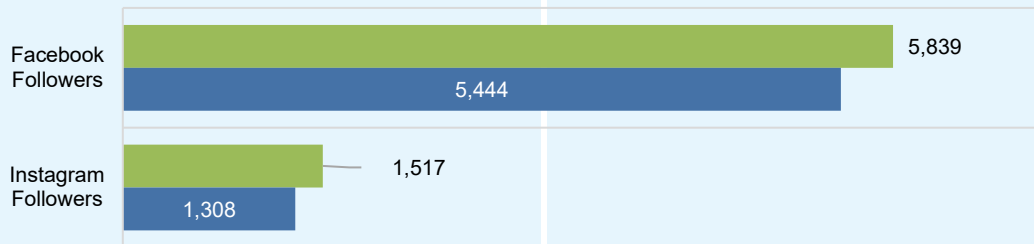
first day tickets were available to the public.

Summer musical theater camp not only found Nemo but enriched the lives of 87 students.

The seven weeks of creative and performing arts camps were led by nine educators. Over 550 family, friends, and theater enthusiasts attended at least one of the three final productions of "Finding Nemo," Ending one amazing summer of arts exploration, friendship, and fun!

SOCIAL ENGAGEMENT

■ Aug-23 ■ Aug-22

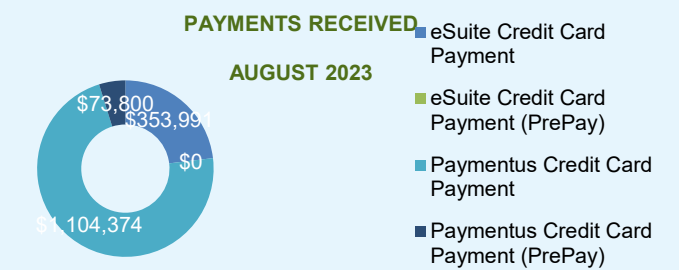


Wake Forest Power

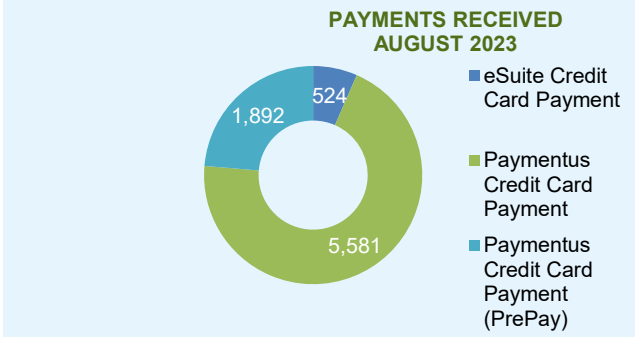
CUSTOMER SUMMARY		
	AUGUST 2023	AUGUST 2022
Electric Meters/Customers	7,399	7,052
Pre-Pay Power Customers	473	458
H.O.P.E. Participants	45	46
N.C. GreenPower Participants	17	17

POWER OUTAGES		
	AUGUST 2023	AUGUST 2022
Total Number of Customers Affected by Outages this Month	251	36
Average Number of Customers Affected per Outage	31.37	12

PAYMENTS RECEIVED		
	AUGUST 2023	AUGUST 2022
eSuite Credit Card Payments	\$353,991.04	\$293,957
eSuite Credit Card Payments (Pre-Pay)	0	2,403
Paymentus CC Payments	\$1,104,374.44	\$766,409.00
Paymentus CC Payments (Pre-Pay)	\$73,800.33	\$58,061.00



NUMBER OF TRANSACTIONS		
	AUGUST 2023	AUGUST 2022
eSuite Credit Card Payments	524	574
Paymentus CC Payments	5,581	4,121
Paymentus CC Payments (Pre-Pay)	1,892	1,482



Advisory Boards

Historic Preservation Commission

MEETINGS		HPC canceled the August meeting. The next meeting will be September 13, 2023.
Most recent meeting held	08/09/2023	
Number of members in attendance 0 out of 11		

Human Relations Council

MEETINGS		Met to finalize plans related to Good Neighbor Day. Met with two candidates interested in participating as a part of the Human Relations Council.
Most recent meeting held	08/24/2023	
Number of members in attendance 4 out of 8		

Public Art Commission

MEETINGS		Celebration of Arts planning continues. The updated Art Vision Plan will be presented at the 9/5/2023 BOC work session. The newest sculpture added on the virtual art tour (inside RC Arts Annex): "The Acquisitionist" by Wake Forest Guild of Artists member Gary Taber. Awaiting additions to the youth wall at Alston-Massenburg (inside the youth room). Working on more project possibilities. Next month is the professional development training with Mr. Dasan Ahanu on 9/28/2023 at 6 p.m. at the RC Grand Hall – all advisory boards are invited.
Most recent meeting held	08/24/2023	
Number of members in attendance 8 out of 8		

Parks, Recreation & Cultural Resources Advisory Board

MEETINGS	
Most recent meeting held	08/28/2023
Number of members in attendance	10 out of 10

The board held its regular monthly meeting on August 28th at 6:30 p.m. at Town Hall.

Work Groups Update:

Art in the Park (8/26) was a big success, 38 participants registered. The suggestion was made to push the event back to a later date.

Unplugged (9/3) 5 p.m.-7 p.m.

Volunteers arrive at 4 p.m., Supplies will arrive by 4 p.m. Currently, six members have signed up to volunteer. The balloon artist has been confirmed.

Joyner Park Tree Trail Event: PRCR & the Neuse River Hawks Conservationists (NRHC) are partnering to commemorate the “Year of the Trail” by hosting a “Tree Trail Trek” Saturday, Sept. 23, from 8 a.m.- Noon at E. Carroll Joyner Park, 701 Harris Road.

Master Plan Listening Session: McAdams received input from the board concerning the master plan update.

Technology Advisory Board

MEETINGS		A quorum was not met by the TAB due to insufficient numbers.
Most recent meeting held	08/28/2023	
Number of members in attendance 4 out of 10		

Urban Forestry Board

MEETINGS		The board will be nominating the former chair for service awards and the Wake Co land cover project data was shared.
Most recent meeting held	08/22/2023	
Number of members in attendance 7 out of 11		



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-57-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: September 19, 2023

SUBJECT

Wake County Tax Release

Recommendation:

Item Summary:

ATTACHMENTS

- [WF-TXREP-AUG-2023-BOC-MTG.pdf](#)
- [WF-TXREP-SEPT-2023-BOC-MTG.pdf](#)



Board of Commissioners

P.O. Box 550 • Raleigh, NC 27602

TEL 919 856 6180
FAX 919 856 5699

SHINICA THOMAS, CHAIR
SUSAN EVANS, VICE-CHAIR
VICKIE ADAMSON
MATT CALABRIA
DON MIAL
CHERYL STALLINGS
JAMES WEST

August 22, 2023

Mr. Kip Padgett
Town Manager;
Town of Wake Forest
301 S. Brooks Street
Wake Forest, North Carolina 27587

Dear Mr. Padgett:

The Wake County Board of Commissioners, in regular session on August 21, 2023, approved and accepted the enclosed tax report for the Town of Wake Forest.

The attached adopted actions are submitted for your review; no local board action is required.

Sincerely,

A handwritten signature in blue ink that reads "Antoinette H. Womack".

Antoinette H. Womack
Deputy Clerk to the Board
Wake County Board of Commissioners



WAKE COUNTY TAX ADMINISTRATION

Rebate details
6/1/2023 - 6/30/2023

WAKE FOREST

DATE
07/04/2023TIME
10:31:36 PMPAGE
1

REBATE NUMBER	PROPERTY	SPEC DIST	CITY TAG	LATE LIST	BILLED INT	TOTAL REBATED	PROCESS DATE	ACCOUNT NUMBER	TAX YEAR	FOR YEAR	BILLING TYPE	OWNER
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WAKE FOREST SPEC DIST

INDIVIDUAL PROPERTY ACCOUNTS

850716	477.05	134.92	50.00	61.20	0.00	723.17	06/27/2023	0006889000	2021	2021	000000	CIRCLE OF SEVEN LLC
850717	245.36	69.40	30.00	31.48	0.00	376.24	06/26/2023	0006889000	2022	2022	000000	CIRCLE OF SEVEN LLC

Subtotal for

INDIVIDUAL PROPERTY ACCOUNTS	722.41	204.32	80.00	92.68	0.00	1,099.41	2 Properties Rebated
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TOTAL WAKE FOREST SPEC DIST	722.41	204.32	80.00	92.68	0.00	1,099.41	2 Properties Rebated for the District/City
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WAKE FOREST (Not In District)

BUSINESS ACCOUNTS

848852	154.69	0.00	0.00	15.47	0.00	170.16	06/06/2023	0006829824	2021	2021	000000	BLACK BELT WORLD
848726	154.69	0.00	0.00	15.47	0.00	170.16	06/06/2023	0006829824	2020	2020	000000	BLACK BELT WORLD
848727	154.69	0.00	0.00	15.47	0.00	170.16	06/06/2023	0006829824	2022	2022	000000	BLACK BELT WORLD

Subtotal for

BUSINESS ACCOUNTS	464.07	0.00	0.00	46.41	0.00	510.48	3 Properties Rebated
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INDIVIDUAL PROPERTY ACCOUNTS

849556	87.69	0.00	25.00	8.77	0.00	121.46	06/13/2023	0006806337	2021	2021	000000	TIMELY TRANSPORTATION AND LOGISTICS I
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WAKE COUNTY TAX ADMINISTRATION

Rebate details
6/1/2023 - 6/30/2023

WAKE FOREST

DATE 07/04/2023
TIME 10:31:36 PM
PAGE 2

REBATE NUMBER	PROPERTY	SPEC DIST	CITY TAG	LATE LIST	BILLED INT	TOTAL REBATED	PROCESS DATE	ACCOUNT NUMBER	TAX YEAR	YEAR FOR	BILLING TYPE	OWNER
849557	78.92	0.00	30.00	7.89	0.00	116.81	06/13/2023	0006806337	2022	2022	000000	TIMELY TRANSPORTATION AND LOGISTICS I
849729	72.17	0.00	30.00	7.22	0.00	109.39	06/14/2023	0006893615	2022	2022	000000	SAVE TIME TRANSPORTATION SERVICES LLC
849731	27.46	0.00	25.00	2.75	0.00	55.21	06/14/2023	0006893570	2021	2021	000000	CIOCALAU, IGOR
849732	24.72	0.00	30.00	2.47	0.00	57.19	06/14/2023	0006893570	2022	2022	000000	CIOCALAU, IGOR
849555	97.43	0.00	25.00	9.74	0.00	132.17	06/13/2023	0006806337	2020	2020	000000	TIMELY TRANSPORTATION AND LOGISTICS I
850300	38.84	0.00	0.00	0.00	0.00	38.84	06/21/2023	0006996475	2023	2022	000000	SUAREZ, MATTIE GRACE
850301	291.85	0.00	30.00	0.00	0.00	321.85	06/21/2023	0006999066	2023	2022	000000	JONES, TERRY ALAN
850302	79.48	0.00	30.00	0.00	0.00	109.48	06/21/2023	0007000311	2023	2022	000000	JONES, TERRY ALAN
849554	126.36	0.00	25.00	12.64	0.00	164.00	06/13/2023	0006806337	2019	2019	000000	TIMELY TRANSPORTATION AND LOGISTICS I
851159	151.67	0.00	30.00	15.17	0.00	196.84	06/29/2023	0006893351	2022	2022	000000	CAPITAL AREA TRUCKING INC
850174	44.38	0.00	0.00	0.00	0.00	44.38	06/20/2023	0006999032	2023	2022	000000	PRICE, ASHTON VICTORIA

Subtotal for

INDIVIDUAL PROPERTY ACCOUNTS	1,120.97	0.00	280.00	66.65	0.00	1,467.62	12 Properties Rebated
TOTAL WAKE FOREST (Not In District)	1,585.04	0.00	280.00	113.06	0.00	1,978.10	15 Properties Rebated for the District/City

TOTAL FOR CITY							
WAKE FOREST	2,307.45	204.32	360.00	205.74	0.00	3,077.51	17 Properties Rebated for the City



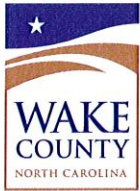
WAKE COUNTY TAX ADMINISTRATION

Rebate details
6/1/2023 - 6/30/2023

WAKE FOREST

DATE 07/04/2023
TIME 10:31:36 PM
PAGE 1

REBATE NUMBER	PROPERTY	SPEC DIST	CITY TAG	LATE LIST	BILLED INT	TOTAL REBATED	PROCESS DATE	ACCOUNT NUMBER	TAX YEAR	YEAR FOR	BILLING TYPE	OWNER
Grand Total:	59,026.36	255.89	4,440.00	6,703.89	0.00	70,426.14			154	Properties Rebated for All Cities		



Board of Commissioners
P.O. Box 550 • Raleigh, NC 27602

TEL 919 856 6180
FAX 919 856 5699

SHINICA THOMAS, CHAIR
SUSAN EVANS, VICE-CHAIR
VICKIE ADAMSON
MATT CALABRIA
DON MIAL
CHERYL STALLINGS
JAMES WEST

September 6, 2023

Mr. Kip Padgett
Town Manager;
Town of Wake Forest
301 S. Brooks Street
Wake Forest, North Carolina 27587

Dear Mr. Padgett:

The Wake County Board of Commissioners, in regular session on September 5, 2023, approved and accepted the enclosed tax report for the Town of Wake Forest.

The attached adopted actions are submitted for your review; no local board action is required.

Sincerely,

A handwritten signature in black ink that reads "Yvonne Gilyard".

Yvonne Gilyard
Clerk to the Board
Wake County Board of Commissioners



WAKE COUNTY TAX ADMINISTRATION

Rebate details
7/1/2023 - 7/31/2023

PAGE

TIME

DATE

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08/16/2023

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WAKE FOREST

REBATE NUMBER	PROPERTY	SPEC DIST	CITY TAG	LATE LIST	BILLED INT	TOTAL REBATED	PROCESS DATE	ACCOUNT NUMBER	TAX YEAR	YEAR FOR	BILLING TYPE	OWNER
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WAKE FOREST SPEC DIST

BUSINESS REAL ESTATE ACCOUNTS

852533	507.06	140.57	0.00	0.00	0.00	647.63	07/18/2023	0000488223	2023	2023	000000	FRANKLIN STREET TOWNES LLC
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Subtotal for

BUSINESS REAL ESTATE ACCOUNTS	507.06	140.57	0.00	0.00	0.00	647.63			1	Properties Rebated		
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TOTAL WAKE FOREST SPEC DIST	507.06	140.57	0.00	0.00	0.00	647.63			1	Properties Rebated for the District/City		
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WAKE FOREST (Not In District)

BUSINESS ACCOUNTS

852145	113.85	0.00	0.00	11.39	0.00	125.24	07/12/2023	0006825109	2022	2022	000000	DOUGLAS J SMITH INC
852142	2.24	0.00	0.00	0.22	0.00	2.46	07/11/2023	0006996043	2023	2023	000000	NUCO2 SUPPLY LLC
852141	2.47	0.00	0.00	0.25	0.00	2.72	07/11/2023	0006996042	2023	2023	000000	NUCO2 SUPPLY LLC
851770	269.14	0.00	0.00	26.92	0.00	296.06	07/08/2023	0006967361	2023	2023	000000	SMITH, JENNIFER

Subtotal for

BUSINESS ACCOUNTS	387.70	0.00	0.00	38.78	0.00	426.48			4	Properties Rebated		
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BUSINESS REAL ESTATE ACCOUNTS



WAKE COUNTY TAX ADMINISTRATION

Rebate details

7/1/2023 - 7/31/2023

WAKE FOREST

PAGE

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DATE

08/16/2023

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REBATE NUMBER	PROPERTY	SPEC DIST	CITY TAG	LATE LIST	BILLED INT	TOTAL REBATED	PROCESS DATE	ACCOUNT NUMBER	TAX YEAR	YEAR FOR	BILLING TYPE	OWNER
853598	230.09	0.00	0.00	0.00	0.00	230.09	07/27/2023	0000479735	2023	2023	000000	TRYON WEST HOMEOWNERS ASSOCIATION INC

Subtotal for

BUSINESS REAL ESTATE ACCOUNTS	230.09	0.00	0.00	0.00	0.00	230.09	1 Properties Rebated
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INDIVIDUAL PROPERTY ACCOUNTS

854005	268.40	0.00	30.00	0.00	0.00	298.40	07/31/2023	0007002150	2023	2022	000000	ABRAHAMS, SANDERS LONG
854004	673.34	0.00	30.00	0.00	0.00	703.34	07/31/2023	0007001968	2023	2022	000000	ABRAHAMS, SANDERS LONG
853470	6.63	0.00	0.00	0.00	0.00	6.63	07/25/2023	000695286	2023	2023	000000	SIW'Y, NICHOLAS CHARLES
853595	9.70	0.00	0.00	0.00	0.00	9.70	07/26/2023	0006865402	2023	2023	000000	LE, CLERCQ DARREN GRANT

Subtotal for

INDIVIDUAL PROPERTY ACCOUNTS	958.07	0.00	60.00	0.00	0.00	1,018.07	4 Properties Rebated
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INDIVIDUAL REAL ESTATE ACCOUNTS

853597	707.00	0.00	0.00	0.00	0.00	707.00	07/27/2023	0000498445	2023	2023	000000	METIS, DAVIDSON
853466	796.58	0.00	0.00	0.00	0.00	796.58	07/27/2023	0000357566	2023	2023	000000	PIKARSKY, TRICIA
853442	20.54	0.00	0.00	0.00	0.00	20.54	07/27/2023	0000477289	2023	2023	000000	FRANCESCHELLI, MICHAEL V
852531	20.33	0.00	0.00	0.00	0.00	20.33	07/18/2023	0000449103	2023	2023	000000	DENNARD, MONTE L
852527	37.17	0.00	0.00	0.00	0.00	37.17	07/18/2023	0000370562	2023	2023	000000	SIMON, DONNA MARY
851472	494.77	0.00	0.00	0.00	0.00	494.77	07/01/2023	0000431987	2023	2023	000000	HOH, ANDREW
851459	1,099.35	0.00	0.00	0.00	0.00	1,099.35	07/01/2023	0000358155	2023	2023	000000	KEATING, JOHN H
851435	344.69	0.00	0.00	0.00	0.00	344.69	07/01/2023	0000280495	2023	2023	000000	HOPE, ANNIE ARLENE
851457	741.65	0.00	0.00	0.00	0.00	741.65	07/01/2023	0000345511	2023	2023	000000	HYMAN, RONNIE

Subtotal for



WAKE COUNTY TAX ADMINISTRATION

Rebate details
7/1/2023 - 7/31/2023

PAGE

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WAKE FOREST

REBATE NUMBER	PROPERTY	SPEC DIST	CITY TAG	LATE LIST	BILLED INT	TOTAL REBATED	PROCESS DATE	ACCOUNT NUMBER	TAX YEAR	FOR YEAR	BILLING TYPE	OWNER
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INDIVIDUAL	4,262.08	0.00	0.00	0.00	0.00	4,262.08			9	Properties Rebated		
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REAL ESTATE ACCOUNTS												
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WILDLIFE BOAT ACCOUNTS

853296	13.51	0.00	0.00	0.00	0.00	13.51	07/24/2023	0004210045	2023	2023	000000	PFISTERER, KATELYNN
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Subtotal for

WILDLIFE BOAT ACCOUNTS	13.51	0.00	0.00	0.00	0.00	13.51			1	Properties Rebated		
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TOTAL WAKE FOREST (Not In District)	5,851.45	0.00	60.00	38.78	0.00	5,950.23			19	Properties Rebated for the District/City		
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TOTAL FOR CITY	6,358.51	140.57	60.00	38.78	0.00	6,597.86			20	Properties Rebated for the City		
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WAKE COUNTY TAX ADMINISTRATION

Rebate details
7/1/2023 - 7/31/2023

WAKE FOREST

DATE 08/16/2023
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PAGE 1

REBATE NUMBER	PROPERTY	SPEC DIST	CITY TAG	LATE LIST	BILLED INT	TOTAL REBATED	PROCESS DATE	ACCOUNT NUMBER	TAX YEAR	YEAR FOR	BILLING OWNER TYPE
Grand Total:	60,368.08	154.33	600.00	370.79	0.00	61,493.20	121	Properties Rebated for All Cities			



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-58-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: September 19, 2023

SUBJECT

Commissioner Reports

Recommendation:

Item Summary:

ATTACHMENTS

-



Board of Commissioners Agenda Item Report

Agenda Item No.: 2023-259-

Submitted by: Kip Padgett

Submitting Department: Administration

Meeting Date: September 19, 2023

SUBJECT

Closed Session - Closed Session 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 the price and other material terms of a contract or proposed contract for the acquisition of real property by purchase, option, exchange, or lease. N.C.G.S. § 143.318.11(a)(5)

Recommendation:

Item Summary:

ATTACHMENTS

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