



Wake Forest Board of Commissioners
Meeting Agenda
April 19, 2022 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 the office of ADA Coordinator [Mickey Rochelle](#) at 919-435-9455 or Deputy Town Clerk [Terry Savary](#) at 919-435-9432 as soon as possible, but no later than 48 hours before the scheduled event.

Cable & Online Broadcast of Board of Commissioners Meetings

All Board of Commissioners meetings are broadcast live on [WFTV 10](#) beginning at 7 p.m. Meetings are also aired 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 [Board of Commissioners](#) 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 Deputy 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 Board of Commissioners regarding the item under consideration with those speaking in favor first and those against speaking second. Proponents and opponents shall each be given five 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 five minutes each to express his/her comments, ideas, concerns, expressions, and desires. No comments will be allowed on agenda items.

Public Comment

During the Public Comment period, anyone wishing to address the Board of Commissioners concerning an issue or topic that is not a public hearing item or an agenda item should complete and submit the Board of Commissioner Public Comment Form on the [Town website](#) or email Deputy Town Clerk [Terry Savary](#) by 9 a.m. the day of the meeting. 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 3-5 minutes to speak. Thank you for your cooperation.

Call to Order

Pledge of Allegiance

1. Approval of Agenda

2. Approval of Minutes

- 2.A. March 1, 2022 Work Session
March 15, 2022 Regular Meeting
[DraftBOCWSEMinutesMar202201.pdf](#)
[DraftBOCMinutesMar202215.pdf](#)

3. Presentations

- 3.A. Resolution Recognizing Virginia H. Jones on her Retirement
[Resolution2022-22AppreciationForTheServicesofVirginiaH.JonesApril202219.pdf](#)
- 3.B. Proclamation Recognizing May as "Building Safety Month"
[Proclamation_BuildingSafetyMonthApril202219.pdf](#)
- 3.C. Proclamation Recognizing May 1, 2022 as "Global Love Day" in the Town of Wake Forest, NC
[Proclamation_GlobalLoveDayApril202219.pdf](#)
- 3.D. Proclamation Recognizing May 5, 2022 as "National Day of Prayer"
[Proclamation_NationalDayOfPrayerApril202219.pdf](#)
- 3.E. Proclamation Recognizing May 2022 as "Mental Health Month"
[Proclamation_MentalHealthMonthApril202219.pdf](#)
- 3.F. Proclamation Recognizing May 14, 2022 as "St. Baldrick's Day"
[Proclamation_StBaldrickFoundationApril202219.pdf](#)
- 3.G. Proclamation Recognizing May 1 through 7, 2022 as the "53rd Annual Professional Municipal Clerks Week"
[Proclamation_MunicipalClerksWeekApril202219.pdf](#)
- 3.H. Proclamation Recognizing "National Public Works Week" May 15-21, 2022
[Proclamation_NationalPublicWorksWeekApril202219_21.pdf](#)

- 3.I. Proclamation Recognizing Mother Rebecca Stallworth Inge
[Proclamation_RecognizingMotherRebeccaStallworthIngeApril202219.pdf](#)
- 3.J. Proclamation Recognizing April 22, 2022 as "Earth Day" in the Town of Wake Forest
[Proclamation_EarthDayApril202219.pdf](#)
- 3.K. Proclamation Recognizing the 90th Birthday of Pidie Forte Lucas Green (added 4/18/2022)
[Proclamation_90thBirthdayPidieForteLucasGreenApril202219.pdf](#)

4. Public Hearings / Public Comment

- 4.A. Public Hearing on CPA-22-01, Revised Draft Town of Wake Forest Community Plan and Land Use Map (March 2, 2022 version)
[BoC Agenda Summary 041922.pdf](#)
[CPA-22-01 Staff Report 041922.pdf](#)
[Attachment A: CPA-22-01 Application.pdf](#)
[Attachment B: Summary of Revised Draft Changes.pdf](#)
[Attachment C: Advisory Committee Comment Responses.pdf](#)
[Attachment D: Planning Board Comment Responses.pdf](#)
[Attachment E: Open House Comment Responses.pdf](#)
[Attachment F: Engage Wake Forest Comment Responses.pdf](#)
[Attachment G: Comments Received Since Planning Board Meeting.pdf](#)
[Attachment I: Ordinance \(CPA-22-01\).docx](#)
[Exhibit 1: DRAFT-Wake Forest Community Plan LQ \(2022-03-02\).pdf](#)
[Exhibit 2: Proposed Draft Community Plan and Land Use Map Revisions.pdf](#)
- 4.B. Public hearing on an annexation petition submitted by George C. Mackie Jr. and Martha Mackie for property associated with Hamlet at Quail Crossing located at 1423 Deerfield Crossing Drive, being Wake County Tax PIN 1850-26-8976 (portion) and adjacent rights-of-way.
[041922 BOC Agenda Summary AN-22-02.pdf](#)
[Attachment A Legal Description AN-22-02.pdf](#)
[Attachment B Annexation Map AN-22-02.pdf](#)
[Attachment C Annexation Petition and Power of Attorney AN-22-02.pdf](#)
[1423 Deerfield Xing Draft Ordinance \(AN-22-02\).docx](#)
- 4.C. Public Hearing on a petition requesting contiguous annexation submitted by Ammons Property Two LLC for property associated with Traditions Townhomes located at 0 Traditions Grande Boulevard being Wake County PIN 1851-12-8142 and adjacent rights-of-way being approximately 7.5617 acres.
[041922 BOC Agenda Summary AN-22-01.pdf](#)
[Attachment A Legal Description AN-22-01.pdf](#)
[Attachment B Annexation Map AN-22-01.pdf](#)

[Attachment C Annexation Petition AN-22-01.pdf](#)
[0 Traditions Grande Blvd Draft Ordinance \(AN-22-01\).docx](#)

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

5. Consent Agenda

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

- 5.A. Updates to the Town of Wake Forest Record Retention Policy to incorporate Program Records.
[Summary_Updates to Records Retention_Incorporate Program Records.docx](#)
[Attachment 1 Program Records Schedule Local Government.pdf](#)
[Resolution2022-20AdoptingThe2021ProgramRecordsScheduleApril202219.pdf](#)
- 5.B. Approval of Appointments to Citizen Advisory Boards
[Resolution2022-18_AdvisoryBoardAppointment-HPCApril202219.pdf](#)
[Resolution2022-19_AdvisoryBoardAppointmentTABApril202219.pdf](#)
- 5.C. Approval of Acceptance of Grant - North Carolina Department of Environmental Quality 2022 Community Waste Reduction and Recycling Grant
[SUMMARY_NDCEQ_CWRAR_Grant_4.19.2022.docx](#)
[Johnson_Jeanette_2022_CWRAR_Grant_Adjusted_Sandy_Skolochenko_NCDEQ_Approval.docx](#)
[2022 CWRAR RFP.pdf](#)
[NCDEQ CWRAR 2022_Grant Award and Guidelines for Acceptance of Grant.pdf](#)
[Resolution Approval of Acceptance_2022 NCDEQ CWRAR Grant Award.docx](#)
- 5.D. Approval to Amend the FY22 Pay Plan to Add a Full-Time Paralegal
[Resolution2022-21ParalegalRequestApril202219.pdf](#)

6. Legislative Items

7. Planning Items

- 7.A. Consideration of CPA-22-01, Revised Draft Town of Wake Forest Community Plan and Land Use Map (March 2, 2022 version)
- 7.B. Consideration of a petition requesting annexation submitted by George C. Mackie Jr. and Martha Mackie for property associated with Hamlet at Quail Crossing located at 1423 Deerfield Crossing Drive, being Wake County Tax PIN 1850-26-8976 (portion) and adjacent rights-of-way.
- 7.C. Consideration of a petition requesting contiguous annexation submitted by Ammons Property Two LLC for property associated with Traditions Townhomes located at 0 Traditions Grande Boulevard being Wake County PIN 1851-12-8142 and adjacent rights-of-way being approximately 7.5617 acres.

8. Administration and Financial Items

9. Public Services Items

10. Parks and Recreation Items

11. Public Safety Items

12. Other Business

- 12.A. Department Monthly Report
[March 2022 Monthly Report.pdf](#)
- 12.B. CIP Project Tracker
[CIP Project Tracker Q3_FY2021-2022.pdf](#)
- 12.C. Strategic Plan
[Strategic Plan Working Document_Q3 Jan-Mar 2022.pdf](#)
- 12.D. Wake County Tax Release
[TXREP-WF-APRIL2022.pdf](#)
- 12.E. Commissioner Reports

13. Adjournment



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-533-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

March 1, 2022 Work Session

March 15, 2022 Regular Meeting

Recommendation:

Item Summary:

ATTACHMENTS

- [DraftBOCWSEMinutesMar202201.pdf](#)
- [DraftBOCMinutesMar202215.pdf](#)



Wake Forest Board of Commissioners Work Session Meeting Minutes

The Wake Forest Board of Commissioners met on **Tuesday, March 1, 2022**, 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.

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

Staff Members Present:

Town Manager Kip Padgett
Town Attorney Hassan Kingsberry
Assistant Town Manager Candace Davis
Assistant Town Manager Allison Snyder
Deputy Town Clerk Terry Savary
Planning Director Courtney Tanner
Assistant Planning Director Jennifer Currin
Long Range Planning Manager Brad West
Planner II – Long Range Dylan Bruchhaus

Renaissance Centre Manger Deborah Dunn
Renaissance Centre Coordinator Ele'Jah Carter
Long Range Planning Manager Brad West
Police Captain Brian Mote
Police Chief Jeff Leonard
Chief Financial Officer Aileen Staples
Assistant Finance Director Samantha Sanchez

1. Presentations

- 1.1 Consideration of waiving the Renaissance Centre rental fees for the Launch Wake Forest May 31, 2022, class graduation.

Renaissance Centre Manager Deborah Dunn introduced Brad Walker representing Launch Wake Forest. She said, as a community organization, Mr. Walker would like the rental fees waived for the class graduation on May 31, 2022.

Mayor Jones said the rental fees had been waived ever since they started Launch Wake Forest and the Town of Wake Forest participates and partners with them. She asked why this had to come before the Board. Ms. Dunn explained the process has changed so staff can track events in a more efficient way.

Brad Walker provided a copy of the Launch Wake Forest Graduate List to the Board and Deputy Town Clerk.

Mayor Jones stated it's a great program and means a lot to a number of people.

ACTION:

Mover: Commissioner Dyer moved to approve the request to waive the Renaissance Centre rental fees for the Launch of Wake Forest May 31, 2022, class graduation.

Seconder: Commissioner Wright.

Vote: Motion carried 5-0.

1.2 Presentation of LEGISLATIVE ITEM TA-22-01 Text Amendment to the Unified Development Ordinance

Planner II - Long Range Dylan Bruchhaus provided an overview of the Text Amendments to the Unified Development Ordinance (UDO). The text amendment will affect five chapters in the UDO, Chapters 2, 7, 9, 15, and Appendix B.

Mayor Jones asked why staff wanted to remove the following text in Section 9.5.5.A of the UDO *"structure could be wrapped by retail, office or some other active use along the primary façade"*. Mr. Bruchhaus explained, the idea is to expand requirements for screening on parking garages for all sides of a parking garage facing the street. He said this won't prevent screening from a structure but will provide more guidance on materials for all levels rather than just retail on the first floor.

Mayor Jones asked if there's been research done on the number of required parking spaces for bicycles. She said the number required seems to be a lot. Mr. Bruchhaus replied, when staff makes revisions to the UDO, he plans on performing a

comprehensive look at bicycle parking. Mayor Jones asked if the number of bicycle parking spaces changed. Mr. Bruchhaus replied, no.

Commissioner Sliwinski asked if everything will remain the same in Chapter 15 of the UDO with the exception of what was brought before the Board. Mr. Bruchhaus replied, correct, it's only the comprehensive plan amendment Section 15.17 that's changing, everything else will remain the same.

Commissioner Sary asked what's driving the parking changes. Mr. Bruchhaus replied, it's to ensure the Journal MUTCD Guidelines are being captured during the development review process for the design standards.

This item will come before the Board of Commissioners for action at its March 15, 2022 meeting.

2. Discussion of Monthly Financial Report

2.1 Monthly Financial Report

Received.

3. Review of Draft Agenda for Upcoming Regular Meeting

3.1 Review of Draft Agenda for Upcoming Regular Meeting

Mayor Jones asked why Bev Whisnant was receiving a resolution of appreciation. She understands Ms. Whisnant has served on the Historic Preservation Committee for a long time but many other people have been involved for a long time too. Planning Director Courtney Tanner stated it was at the request of the Historic Preservation Commission. Planning Director Tanner stated she is more than happy to handle this a different way if that's what the Board recommends. The Board was in agreement in leaving it as is.

Town Manager Kip Padgett stated the following amendment for the draft March 15, 2022 agenda:

- Section 8.B. Administration and Financial Items: Approval of the Town of Wake Forest Strategic Plan Update 2022.

4. Other Business

4.1 Consideration of Approval to Submit a RAISE Grant and Provide the Local Match

Mayor Jones spoke about a resolution to partner with NCDOT to apply for a RAISE grant and commitment of funding. She explained the RAISE grant is a matching grant, and NCDOT asked for participation from the communities along the S-Line.

The Town of Wake Forest will sponsor the grant application on behalf of NCDOT and other partners along the rail line.

ACTION:

Mover: Commissioner Sary moved to approve submittal of a RAISE Grant as presented.

Seconder: Commissioner Dyer.

Vote: Motion carried 5-0.

RESOLUTION 2022-08

RESOLUTION TO PARTNER WITH NCDOT TO APPLY FOR A RAISE GRANT AND COMMITMENT OF FUNDING

WHEREAS, the Wake Forest Board of Commissioners have expressed their support of the development of the S-Line; and

WHEREAS, development of the S-Line will have a positive effect on the local economy, enhance regional mobility and connect rural communities; and

WHEREAS, NCDOT has asked the communities along the S-Line to partner with the state in applying for a federal RAISE grant as part of the recently passed national infrastructure bill; and

WHEREAS, the grant will assist in site assessment, preliminary engineering and environmental documentation of a mobility hub location to accommodate both commuter and intercity passenger rail service; and

WHEREAS, the local match to perform this study for a site in Wake Forest is 20% (\$190,000); and

WHEREAS, NCDOT has also asked the Town to sponsor the grant on behalf of the region.

BE IT RESOLVED by the Board of Commissioners of the Town of Wake Forest that the Town is authorized to commit \$190,000 as the 20% match for the grant.

THEREFORE, BE IT FURTHER RESOLVED the Town is authorized to sponsor the grant application on behalf of NCDOT and other partners along the rail line.

Duly adopted this 1st day of March 2022.

5. Commissioner Reports

Commissioner Dyer stated the Historic Preservation Commission will meet next week and are looking for new members. The Human Relations Council met last week and are preparing for the Multicultural Day Event in April 2022. Mr. Dyer plans to attend the North Carolina League of Municipality program on advancing advocacy information. He's been working on affordable housing and has been doing some research on the Raleigh/Wake Partnership to End Homelessness and the Wake County Continuum of Care..

Commissioner Wright attended the State of the Town Address and Dinner. He met with Congresswoman Deborah Ross.

Commissioner Sliwinski attended the Urban Forestry Board and the Parks, Recreation & Cultural Resources Meetings. The Forest Fest Event is coming up in April 2022. Six Sundays in Spring starts in April 2022. He mentioned 900 children signed up for Wake Forest youth softball and baseball. He spoke about the upcoming Renaissance Centre Film Festival and the Arts for All series.

Commissioner Shackelford had no update.

Commissioner Sary attended the State of the Town Address and Dinner. He congratulated Mayor Jones on receiving the Rotary Peace Award. He attended the Public Arts Commission Meeting last week. He hopes to attend the Film Festival at the Renaissance Centre. He spoke about the need for coaches and asked folks to take the time to volunteer and coach. He'll be attending some of the grand openings/ribbon cuttings coming up over the next couple of weeks.

Mayor Jones attended Wake Forest Chamber of Commerce Business after Hours at Brookfield's Indoor Golf & Lounge. She attended the groundbreaking of Casa Esperanza Montessori Charter School. She attended a webinar with Electricities on using federal grants and opportunities for electricity grants. She attended the NC Mayors Association. Mayor Jones and Town staff met with NCDOT staff and shared some of their concerns regarding the Capital Blvd. project.

Town Manager Kip Padgett said the Parks and Recreation Department are getting back to pre-pandemic numbers and are currently seeing that with softball and baseball registration. He informed the Board there will be a Joint Public Hearing coming up in

the next few months. Town Manager Padgett said the Fire Department is working with the Finance Department to apply for a SAFER grant.

6. Adjournment

With no further business to discuss, Mayor Jones adjourned the meeting at 6:34 p.m.

Duly approved in open session this 19th day, of April 2022.

(ATTEST)

Mayor

(Deputy) Town Clerk



Wake Forest Board of Commissioners Meeting Minutes

The Wake Forest Board of Commissioners met on **Tuesday, March 15, 2022** 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.**

Mayor Jones led everyone in the Pledge of Allegiance.

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

Staff Members Present:

Town Manager Kip Padgett
Town Attorney Hassan Kingsberry
Assistant Town Manager Candace Davis
Assistant Town Manager Allison Snyder
Strategic Performance Manager Lisa Hayes
Deputy Town Clerk Terry Savary
Planning Director Courtney Tanner
Assistant Planning Director Jennifer Currin
Senior Planner Kari Grace
Long Range Planning Manager Brad West
Senior Planner – Historic Preservation Michelle Michael
Planner 1 – Development Services Emma Linn

Planner II – Long Range Dylan Bruchhaus
Chief Financial Officer Aileen Staples
Purchasing Manager Randy Driver
Senior Budget Analyst Ben Blevins
Assistant Finance Director Samantha Sanchez
Police Chief Jeff Leonard
Police Captain Brian Mote
Interim Public Works Director Tim Bailey
Yard Waste Collection Supervisor Chad Hildebrandt
Sustainability Coordinator Jeanette Johnson

1. Approval of Agenda

1.A. Approval of Agenda

ACTION:

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

Second: Commissioner Sliwinski.

Vote: Motion carried 5-0.

2. Approval of Minutes

2.A. Approval of Minutes:

- January 21, 2022, Board Retreat
- February 1, 2022, Work Session
- February 15, 2022, Regular Meeting

ACTION:

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

Second: Commissioner Wright.

Vote: Motion carried 5-0.

3. Presentations

3.A. Consideration of a Resolution of Appreciation for the Service of Beverly "Bev" Whisnant on the Historic Preservation Commission

Commissioner Dyer presented a Resolution of Appreciation for the Service of Beverly "Bev" Whisnant on the Historic Preservation Commission:

RESOLUTION 2022-09
RESOLUTION OF APPRECIATION FOR THE SERVICE OF
BEVERLY "BEV" WHISNANT

WHEREAS, Beverly "Bev" Whisnant served most recently on the Historic Preservation Commission of the Town of Wake Forest from 2017 to 2022 and previously from 2002 to 2008; and

WHEREAS, Beverly "Bev" Whisnant advocated for the preservation of the Wake Forest's History, Historic Districts and Properties; and

WHEREAS, Beverly "Bev" Whisnant put forth substantial effort toward improving the quality of life for the citizens of the Town of Wake Forest and has been previously recognized by the Town of Wake Forest as its Citizen of the Year and with the Distinguished Service Award from the Wake Forest College Birthplace Society; and

WHEREAS, Beverly "Bev" Whisnant served unselfishly in her capacity for the good of the Town of Wake Forest, as a founding and current member of the Wake Forest Historical Association, member of the Ailey Young House Steering Committee, the Community Christmas Dinner Committee, Kiwanis, and General James Moore Chapter of the Daughters of the American Revolution; and volunteer for the Wake Forest Historical Museum; and

WHEREAS, the Wake Forest Historic Preservation Commission, at their January 12, 2022 meeting, voted unanimously to recommend approval of this resolution to the Board of Commissioners; and

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Town of Wake Forest, North Carolina, that Beverly "Bev" Whisnant is hereby officially commended by this Board on behalf of the citizens of Wake Forest for valuable service rendered to the Town of Wake Forest.

BE IT FURTHER RESOLVED that this resolution be made a part of the permanent records of the Town of Wake Forest and that a copy of this resolution be presented to Beverly "Bev" Whisnant.

3.B. Presentation of Proclamation Proclaiming Mayor's Monarch Pledge Month

Mayor Jones stated the Proclamation Proclaiming Mayor's Monarch Pledge Month would be sent to the requestor:

MAYORS' MONARCH PLEDGE MONTH

WHEREAS, the monarch butterfly is an iconic North American species whose multigenerational migration and metamorphosis from caterpillar to butterfly has captured the imagination of millions of Americans; and

WHEREAS, 20 years ago, more than one billion Eastern monarch butterflies migrated to Mexico, but populations of this iconic species have declined by 90% in the last two decades; and

WHEREAS, cities, towns, and counties have a central role in raising awareness in the effort to help save the monarch butterfly and the Town of Wake Forest has played a leadership role in the effort to protect the monarch butterfly by planting a milkweed garden at E. Carroll Joyner Park and at the Northern Wake Senior Center; and

***WHEREAS**, every resident of Wake Forest can make a difference for the monarch by planting native milkweed and nectar plants to provide habitat for the monarch and pollinators in locations where people live, work and play; and*

***WHEREAS**, on behalf of the residents of Wake Forest, I have signed the National Wildlife Federation's Mayors' Monarch Pledge to bring awareness to this issue; and*

***NOW, THEREFORE**, I, Vivian A. Jones, Mayor of the Town of Wake Forest, North Carolina do hereby proclaim April, 2022, as Mayors' Monarch Pledge Month in the Town of Wake Forest and encourage all residents to preserve and strengthen the monarch butterfly population.*

3.C. Presentation regarding Litter Reduction efforts from February 2021 - February 2022

Sustainability Coordinator Jeanette Johnson provided a presentation regarding Litter Reduction efforts.

4. Public hearings / Public Comment

4.A. Public Hearing to receive input for the FY 2022-2023 Budget

Mayor Jones asked if anyone wished to speak. No one came forward to speak. Mayor Jones closed the public hearing.

4.B. Public Hearing on LEGISLATIVE ITEM TA-22-01 Text Amendment to the Unified Development Ordinance

Mayor Jones asked if anyone wished to speak. No one came forward to speak. Mayor Jones closed the public hearing.

4.C. Public Comment

Jennifer Amyx at 9908 Calvados Drive, Wake Forest, NC stated she is a member of the Local Chapter of the North Carolina Wildlife Federation. She thanked the Board for the Monarch Pledge and thinks it's important. Ms. Amyx noted some of the details in the proclamation suggests more leadership of the town then is actually being made. The milkweed at Joyner Park is all naturally occurring milkweed and was not planted as a garden by the town. Ms. Amyx stated the garden at the senior center also has milkweed that was planted by members of the Neuse River Hawks Local Wildlife Federation. Ms.

Amyx wanted to clarify those things and thanked the Board for elevating the mission of the monarch butterflies. Mayor Jones apologized and thought the Parks & Recreation staff had planted some of the milkweed at Joyner Park. Mayor Jones will check with Town staff to confirm.

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 Budget Ordinance Amendment # 3 for FY 2021-2022
- 5.B. Approval of a resolution to schedule the public hearing and certify the sufficiency for a petition requesting contiguous annexation submitted by Ammons Property Two LLC for property associated with Traditions Townhomes located at 0 Traditions Grande Boulevard being Wake County PIN 1851-12-8142 and adjacent rights-of-way being approximately 7.5617 acres
- 5.C. Approval of resolution authorizing installment purchase agreement (FY 22 Police vehicles)
- 5.D. Approval of a resolution to schedule the public hearing and certify the sufficiency for a petition requesting annexation submitted by George C. Mackie Jr. and Martha Mackie for property associated with Hamlet at Quail Crossing located at 1423 Deerfield Crossing Drive, being Wake County Tax PIN 1850-26-8976 (portion) and adjacent rights-of-way.

ACTION:

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

Seconded: Commissioner Sary.

Vote: Motion carried 5-0.

6. Legislative Items

No Legislative Items were presented.

7. Planning Items

7.A. Consideration of LEGISLATIVE ITEM TA-22-01 Text Amendment to the Unified Development Ordinance

Mayor Jones stated the Planning Board voted (6-1) to find the request consistent with the Comprehensive Plan and recommended approval with the condition to strike the following language in the Unified Development Ordinance (UDO) Section 9.5.5 (A): *(e.g., structure could be wrapped by retail, office or some other active use along the primary façade).*

Commissioner Sary asked the reasoning behind the text amendment. Planner II Dylan Bruchhaus stated the original language is written with the intent of only having the first story of the parking structure wrapped and as staff expanded it to capture multiple stories the Planning Board suggested removing the original language.

ACTION:

Mover: Commissioner Dyer moved to approve Item TA-22-01 Text Amendment to the Unified Development Ordinance.

Seconder: Commissioner Sary.

Vote: Motion carried 5-0.

7.B. Consideration of Resolution authorizing the Town Manager to execute, on behalf of the Town of Wake Forest, the professional services contract of the comprehensive UDO (Unified Development Ordinance) and MSSD (Manual of Specifications, Standards & Design) update

Senior Planner Kari Grace provided an overview of the professional services contract of the comprehensive UDO and MSSD update.

Commissioner Dyer asked how they came up with an amount of a \$337,905 budget. Ms. Grace responded it's a combination of the work associated with the UDO update as

well as MSSD updates. She said this was proposed by the consultant, not necessarily staff, as far as itemizing out each item.

Commissioner Sary asked what role will Tool Design be playing in the process. Ms. Grace stated Tool Design would serve as the technical consultant on the MSSD updates.

Commissioner Sary asked what the make of a UDO Advisory Committee would be. Ms. Grace said they haven't reached out to make any invitations as of yet because the project hasn't been approved to proceed. Ms. Grace said they do envision the committee including stakeholders, business owners, the development community, and residents.

ACTION:

Mover: Commissioner Wright moved to approve the professional services contract of the comprehensive UDO (Unified Development Ordinance) and MSSD (Manual of Specifications, Standards & Design) update.

Seconder: Commissioner Dyer.

Vote: Motion carried 5-0.

8. Administration and Financial Items

8.A. Consideration of approval of amendment to Purchasing Policy

Chief Financial Officer Aileen Staples provided an overview of the amendment request.

Purchasing Manager Randy Driver spoke about issues with supply chain demand.

ACTION:

Mover: Commissioner Wright moved to approve as presented.

Seconder: Commissioner Dyer.

Vote: Motion carried 5-0.

**RESOLUTION APPROVING AMENDMENT TO PURCHASING AND WAREHOUSE
POLICY**

TOWN OF WAKE FOREST, NORTH CAROLINA

WHEREAS the Board of Commissioners approved a purchasing policy in October 2007 and updated in August 2019. This policy outlines the responsibilities and procedures governing the purchases of goods, equipment and services for the Town of Wake Forest.

WHEREAS the policies and procedures provided ensure the fair and equitable treatment for all parties involved in public purchasing is demonstrated while following all applicable statutory requirements; and

WHEREAS, North Carolina General Statute 143-129 states the following: For purchases of apparatus, supplies, materials, or equipment, the governing body of any political subdivision of the State may, subject to any restriction as to dollar amount, or other conditions that the governing body elects to impose, delegate to the manager, school superintendent, chief purchasing official, or other employee the authority to award contracts, reject bids, or readvertise to receive bids on behalf of the unit. Any person to whom authority is delegated under this subsection shall comply with the requirements of this Article that would otherwise apply to the governing body.

WHEREAS the Board of Commissioners delegates authority to the Town Manager and/or his designee (Purchasing Manager or Chief Financial Officer) to authorize any purchase of apparatus, supplies, materials or equipment up to \$1,000,000.

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Town of Wake Forest amends the Purchasing and Warehouse Policy as presented.

8.B. Consideration of approval of Town of Wake Forest Strategic Plan Update 2022

Strategic Performance Manager Lisa Hayes provided an overview regarding the Strategic Plan Update 2022.

Mayor Jones appreciates Ms. Hayes work and thinks it's a great update to the Strategic Plan.

ACTION:

Mover: Commissioner Dyer moved to approve as presented.

Seconder: Commissioner Wright.

Vote: Motion carried 5-0.

**RESOLUTION OF THE BOARD OF COMMISSIONERS
APPROVING THE STRATEGIC PLAN UPDATE 2022**

WHEREAS, in order to plan effectively for the future, the Town of Wake Forest Board of Commissioners conducted a visioning and strategic planning process which resulted in the adoption of a Strategic Plan in 2015 ("Strategic Plan"); and

WHEREAS, the governing body, Town Manager and Department Directors reviewed the 2015 Strategic Plan and facilitated updates in 2017 and 2019; and

WHEREAS, the Town Manager, Strategic Performance Manager and Department Directors meet on August 16, 2021 to evaluate its performance to date in implementing the Strategic Plan and, as a result, have updated and made modifications to the Vision and Values for Board of Commissioners consideration; and

WHEREAS, the staff recommended Vision and Values, were presented to the Board of Commissioners at the August 26, 2021 Board work session with the Board of Commissioners incorporating ideas and recommendations generated to draft a Strategic Plan Update 2022; and

WHEREAS, the draft Strategic Plan Update 2022, including Mission, Vision, Values and Goals, was presented to the citizens of Wake Forest through four community focus group sessions in September/October 2021 to engage community stakeholders and solicit input to the draft plan; and

WHEREAS, an employee survey took place in September 2021 to gauge employee response to the draft Strategic Plan Update (2022) Vision and Values; and

WHEREAS, the Board of Commissioners participated in a retreat on January 21, 2022, with a main purpose of reviewing and finalizing the draft Strategic Plan Update 2022; and

WHEREAS, during the retreat, the draft Strategic Plan Update 2022 was analyzed for continued relevance and priority recommendations were made for each goal; and

WHEREAS, the Town Manager will work with staff to develop tasks, measures, and descriptions of what will be done to complete the objectives outlined in the Strategic Plan Update 2022; and

WHEREAS, the Strategic Plan Update 2022 will be effective at the beginning of the new fiscal year, July 1, 2022: and

NOW, THEREFORE, BE IT RESOLVED by the governing body of the Town of Wake Forest hereby approves the Strategic Plan Update 2022 as set forth in the attached Exhibit #1 - Strategic Plan Update –2022.

9. Public Services Items

No Public Services 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. Wake County Tax Release

Received.

12.C. Commissioner Reports

Commissioner Sary had no update.

Commissioner Shackelford had no update.

Commissioner Sliwinski had no update.

Commissioner Wright attended the Film Festival dinner. He reminded everyone about the 2022 Wake Forest STEM Saturday held on April 30, 2022 at Joyner Park Community Center.

Commissioner Dyer attended a meeting at the Senior Center. He attended a Historic Preservation Commissioner (HPC) meeting. The HPC are busy planning many things including the Christmas Historic Home Tour to be held on the first Saturday in December. The Human Relations Council is working on Multicultural Day. There's a congressional luncheon on March 22, 2022. The Memorial Flag-Raising Ceremonies will begin on the first Monday of every month, April through October.

Mayor Jones attended a meeting at the Senior Center. She attended the Wake Forest Film Festival at the Renaissance Center and said it was great seeing the support from the community. She is a member of the Legislative Policy Committee for the League of

Municipalities and attended their first meeting this week. Mayor Jones congratulated Lisa Hayes on being recognized as a North Carolina Main Street Champion. Mayor Jones attended the Koinonia Foundation and congratulated Ruth Ann Dyer on being presented with the Russell Dew Community Service Award. She met with Mr. Baker's Civic Classes at Wake Forest High School. Mayor Jones mentioned John Hodges with TJCOG is retiring and is sorry to see him go. Hallie Willis is leaving the Downtown Development Department.

Town Manager Kip Padgett had no update.

12.D. "Closed Session: N.C.G.S. 143.318.11(a)(3) Consultation with the Town Attorney
Closed Session: N.C.G.S. 143.318.11(a)(3) Consultation with the Town Attorney: Town of Wake Forest v. Pullen (20-CVS-12922)"

ACTION:

Mover: Commissioner Wright moved to go into closed session.

Second: Commissioner Sary.

Vote: Motion carried 5-0.

The Board of Commissioners went into closed session at approximately 6:50 p.m.

The Board of Commissioners returned to open session at 7:12 p.m.

ACTION:

Mover: Commissioner Dyer moved to approve a Resolution of Condemnation.

Second: Commissioner Wright.

Vote: Motion carried 5-0.

**RESOLUTION OF THE BOARD OF COMMISSIONERS
REGARDING ACQUISITION OF A FEE SIMPLE INTEREST
IN CERTAIN PROPERTY AS PART OF THE EXTENSION OF THE
SMITH CREEK GREENWAY PROJECT**

WHEREAS, the Town of Wake Forest ("Town") received a grant from the North Carolina Clean Water Management Trust Fund, a division of the North Carolina Department of Natural and Cultural Resources ("CWMTF") for the acquisition of fee interests in certain subdivided parcels situated north of Burlington Mills Road along the Smith Creek corridor over which the

Town intends to complete certain greenway improvements to extend the Smith Creek Greenway trail and amenity system ("Project");

WHEREAS, *the Board of Commissioners of the Town ("Board") hereby determines that it is necessary and in the public interest to acquire fee interests in certain subdivided parcels situated north of Burlington Mills Road along the Smith Creek corridor for the following public purpose:*

To protect the safety, comfort and public wellbeing for Town citizens and to provide the public certain riparian greenway amenities and improvements for environmental, educational and recreational uses;

WHEREAS, *the parent tract to be subdivided and included in the Project is currently owned by Jeffrey W. Newhouse and Lisa A. Hayes f/k/a Lisa A. Newhouse, such parent tract located at 2004 Old Crawford Road, Wake Forest, NC 27587 and comprised of approximately 4.42 acres (in aggregate) and identified by the Wake County Revenue Department as Parcel Identification Number(s) #1749156658 (the "Newhouse Tract"), of which 0.46 acres is to be created via subdivision and included in the Project for the construction of future greenway extension and improvements ("S-5 Parcel");*

WHEREAS, *the Town attempted to acquire the S-5 Parcel by way of direct negotiations with the owners of the Newhouse Tract pursuant to the terms and conditions of the Grant, but was unable to do so, and therefore, the acquisition of said S-5 Parcel is no longer subject to the CWMTF grant, but is nonetheless still vital to the Project;*

WHEREAS, *the Board, having found that the public purpose described herein together with the furtherance of the Project necessitates the acquisition of the S-5 Parcel as more particularly described on Exhibit A and depicted on Exhibit B, each attached hereto and incorporated herein by reference, directed the Town Attorney at a duly held Closed Session of the Meeting of the Board of Commissioners dated March 15, 2022 (the "Closed Session Directive"), to file a condemnation action to acquire the S-5 Parcel; and*

NOW, THEREFORE, BE IT RESOLVED *by the Board that the Town hereby ratifies the Closed Session Directive which authorized the fee acquisition of the S-5 Parcel, by eminent domain, or other agreement between the parties, for the continued implementation and furtherance of the Project and public purpose described herein and such other lawful purposes to which the Town may devote the S-5 Parcel.*

BE IT FURTHER RESOLVED *that all prior actions of the Town Attorney and staff or the Town on behalf of the Town pursuant to the Closed Session Directive are hereby ratified and confirmed, and the Town Attorney and staff of the Town be and are hereby authorized and directed to proceed with such additional notices, filings and other necessary proceedings in the Superior Court of Wake County, North Carolina, to effectuate the acquisition of the S-5 Parcel authorized by the General Statutes of North Carolina, special act or the Charter of the Town,*

said Town Attorney being hereby authorized on behalf of the Town to give or receive such notice or notices as may be by law required.

13. Adjournment

With no further business to discuss, Mayor Jones adjourned the meeting at 7:13 p.m.

Duly approved in open session this 19th day of April 2022.

(ATTEST)

Mayor

(Deputy) Town Clerk



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-536-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Resolution Recognizing Virginia H. Jones on her Retirement

Recommendation:

Item Summary:

ATTACHMENTS

- [Resolution2022-22AppreciationForTheServicesofVirginiaH.JonesApril202219.pdf](#)

RESOLUTION 2022-22

RESOLUTION OF APPRECIATION FOR THE SERVICES OF

Virginia H. Jones

WHEREAS, Virginia H. Jones was hired as Human Resources Director effective March 19, 2013; and

WHEREAS, Virginia H. Jones developed several policies and procedures to accommodate the growing employee workforce during her tenure; and

WHEREAS, Virginia H. Jones helped create and served as the inaugural chair of the North Carolina Health Insurance Pool (NCHIP); and

WHEREAS, Virginia H. Jones' service on NCHIP helped to prevent insurance premium increases for employees over the past four years ; and

WHEREAS, with over 9 years of service to the Town, Virginia H. Jones has served unselfishly in her capacity for the good of the Town of Wake Forest, making sacrifices in personal and family ties; and

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Town of Wake Forest, North Carolina, that Virginia H. Jones is hereby officially commended by this Board on behalf of the citizens of the Town of Wake Forest for valuable and outstanding service rendered to the Town in her official capacity as Human Resources Director with the Town of Wake Forest.

BE IT FURTHER RESOLVED that this resolution be made a part of the permanent records of the Town of Wake Forest and that a copy of this resolution be presented to Virginia H. Jones.

This the 19th day of April 2022.

ATTEST:

Vivian A. Jones,
Mayor

(Deputy) Town Clerk



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-491-
Submitted by: Sherry Scoggins
Submitting Department: Inspections
Meeting Date: April 19, 2022

SUBJECT

Proclamation Recognizing May as "Building Safety Month"

Recommendation:

Item Summary:

ATTACHMENTS

- [Proclamation_BuildingSafetyMonthApril202219.pdf](#)



PROCLAMATION

RECOGNIZING MAY 2022 AS “BUILDING SAFETY MONTH”

WHEREAS, the Town of Wake Forest is committed to recognizing that our growth and strength depends on the safety and essential role our homes, buildings and infrastructure play, both in everyday life and when disasters strike, and;

WHEREAS, our confidence in the resilience of these buildings that make up our community is achieved through the devotion of vigilant guardians-building safety and fire prevention officials, architects, engineers, builders, tradespeople, design professionals, laborers, plumbers and others in the construction industry-who work year-round to ensure the safe construction of buildings, and;

WHEREAS, these guardians are dedicated members of the International Code Council, a nonprofit that brings together local, state, territorial, tribal and federal officials who are experts in the built environment to create and implement the highest-quality codes to protect us in the buildings where we live, learn, work and play, and;

WHEREAS, these modern building codes include safeguards to protect the public from hazards such as hurricanes, snowstorms, tornadoes, wildland fires, floods and earthquakes, and;

WHEREAS, Building Safety Month is sponsored by the International Code Council to remind the public about the critical role of our communities' largely unknown protectors of public safety-our local code officials- who assure us of safe, sustainable and affordable buildings that are essential to our prosperity, and;

WHEREAS, "Safety for All: Building Codes in Action," the theme for Building Safety Month 2022, encourages us all to raise awareness about planning for safe and sustainable construction; career opportunities in building safety; understanding disaster mitigation, energy conservation; and creating a safe and abundant water supply to all of our benefit, and;

WHEREAS, each year, in observance of Building Safety Month, people all over the world are asked to consider the commitment to improve building safety, resilience and economic investment at home and in the community, and to acknowledge the essential service provided to all of us by local and state building departments, fire prevention bureaus and federal agencies in protecting lives and property.

NOW, THEREFORE, I, Vivian A. Jones, Mayor of the Town of Wake Forest do hereby proclaim the month of May 2022 as “Building Safety Month” and encourage our citizens to join in appreciation for the essential service provided to all of us by our local and state building code departments, fire prevention bureaus, and federal agencies.

This the 19th day of April 2022.

Attest:

(Deputy) Town Clerk



Mayor



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-521-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Proclamation Recognizing May 1, 2022 as "Global Love Day" in the Town of Wake Forest, NC

Recommendation:

Item Summary:

ATTACHMENTS

- [Proclamation_GlobalLoveDayApril202219.pdf](#)



TOWN of
WAKE FOREST

301 S. Brooks Street
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PROCLAMATION

RECOGNIZING MAY 1, 2022 AS "GLOBAL LOVE DAY" IN THE TOWN OF WAKE FOREST, NC

WHEREAS, GLOBAL LOVE DAY will establish a worldwide focus towards “unconditionally loving each other as we love ourselves.”

WHEREAS, We are One Humanity on this planet; All life is interconnected and interdependent; All share in the Universal bond of love;

WHEREAS, Love begins with self-acceptance and forgiveness; with respect and compassion we embrace diversity; Together we make a difference through love;

WHEREAS, The Love Foundation, Inc. invites mankind to declare May 1, 2022 as “GLOBAL LOVE DAY”, a day of forgiveness and unconditional love. GLOBAL LOVE DAY will act as a model for all of us to follow, each and every day.

NOW, THEREFORE, I, Vivian A. Jones, Mayor of the Town of Wake Forest, hereby dedicate and proclaim May 1, 2022 as “GLOBAL LOVE DAY” in Wake Forest and invite all citizens to observe this day.

This the 19th day of April 2022.

Attest:

Mayor

(Deputy) Town Clerk





Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-531-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Proclamation Recognizing May 5, 2022 as "National Day of Prayer"

Recommendation:

Item Summary:

ATTACHMENTS

- [Proclamation_NationalDayOfPrayerApril202219.pdf](#)



PROCLAMATION

NATIONAL DAY OF PRAYER

May 5, 2022

WHEREAS, civic prayers and national days of prayer have a long and venerable history in our constitutional republic, dating back to the First Continental Congress in 1775; and

WHEREAS, the Declaration of Independence, our first statement as Americans of national purpose and identity, made the Laws of Nature and Nature's God the foundation of our United States of America and asserted that people have inalienable rights that are God-given; and

WHEREAS, the Supreme Court has affirmed the right of state legislatures to open their sessions with prayer and the Supreme Court and the U. S. Congress themselves begin each day with prayer; and

WHEREAS, in 1988, legislation setting aside the first Thursday of May in each year as a National Day of Prayer was passed unanimously by both Houses of Congress and signed by President Ronald Reagan; and

WHEREAS, the National Day of Prayer is an opportunity for Americans of all faiths to join in united prayer to acknowledge our dependence on God, to give thanks for blessings received, to request healing for wounds endured, and to ask God to guide our leaders and bring wholeness to the United States and her citizens; and

WHEREAS, it is fitting and proper to give thanks to God by observing a day of prayer in the Town of Wake Forest when all may acknowledge our blessings and express gratitude for them, while recognizing the need for strengthening religious and moral values in our State and nation; and

WHEREAS, we pray for those who are affected by the Coronavirus and for our community as we recover from this and begin to move forward.

NOW, THEREFORE, I, Vivian A. Jones, Mayor of the Town of Wake Forest do hereby proclaim Thursday, May 5, 2022, as "**A DAY OF PRAYER IN WAKE FOREST**" and urge all citizens of Wake Forest to observe the day in ways appropriate to its importance and significance.

This the 19th day of April 2022.

Attest:

(Deputy) Town Clerk

Mayor





Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-532-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

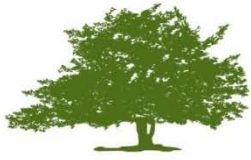
Proclamation Recognizing May 2022 as "Mental Health Month"

Recommendation:

Item Summary:

ATTACHMENTS

- [Proclamation_MentalHealthMonthApril202219.pdf](#)



PROCLAMATION

RECOGNIZING MAY 2022 AS “MENTAL HEALTH MONTH”

WHEREAS, there is a proven connection between good mental health and overall personal health, and mental illnesses affect almost every family in America; and

WHEREAS, people with mental illnesses recover if given the necessary services and supports in their communities, and people with mental illnesses make important contributions to our families and our communities; and

WHEREAS, millions of adults and children are disabled by mental illnesses every year only one out of two people with a serious form of mental illness seeks treatment for his or her mental illness; and

WHEREAS, stigma and fear of discrimination keep many who would benefit from mental health services from seeking help, research shows that the most effective way to reduce stigma is through personal contact with someone with a mental illness; and

WHEREAS, good mental health is critical to the well-being of our families, communities, schools, and businesses, greater public awareness about mental illnesses can change negative attitudes and behaviors toward people with mental illnesses;

NOW, THEREFORE, I, Vivian A. Jones, Mayor of the Town of Wake Forest do hereby proclaim the month of May 2022 as MENTAL HEALTH MONTH. As the Mayor of the Town of Wake Forest I also call upon all Town of Wake Forest citizens, government agencies, public and private institutions, businesses, and schools to recommit our community to increasing awareness and understanding of mental illnesses, reducing stigma and discrimination, and promoting appropriate and accessible services for all people with mental illnesses.

This the 19th day of April 2022.

Attest:

(Deputy) Town Clerk



Mayor



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-534-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Proclamation Recognizing May 14, 2022 as "St. Baldrick's Day"

Recommendation:

Item Summary:

ATTACHMENTS

- [Proclamation_StBaldrickFoundationApril202219.pdf](#)



PROCLAMATION

RECOGNIZING ST. BALDRICK'S DAY MAY 14, 2022

WHEREAS in 2000, the very first ever St. Baldrick's head-shaving event took place in New York City with 17 people shaving their heads to raise funds for the most promising childhood cancer research. Since becoming an independent charity in 2005, the St. Baldrick's Foundation has granted more than \$315 million to support the best research just for kids, making it the largest private funder of childhood cancer research grants worldwide; and

WHEREAS in 2008, the first St. Baldrick's head-shaving event in Wake Forest was organized by community volunteers and staff at O'Dwyers Irish Pub. Participants and attendees came together in this unique fundraising event to raise funds for childhood cancer research and to give kids the healthy childhoods they deserve; and

WHEREAS for the 15th consecutive year, this amazing community has continued to organize and support the St. Baldrick's Foundation – raising over \$1.25 MILLION and counting for lifesaving research; and

WHEREAS since 2005 the St. Baldrick's Foundation has awarded more than \$9 million to North Carolina institutions including the University of North Carolina at Chapel Hill and Duke University Medical Center.

NOW, THEREFORE, I, VIVIAN A. JONES, Mayor of the Town of Wake Forest, North Carolina, do hereby proclaim May 14, 2022 as

"ST. BALDRICK'S DAY"

In the town of Wake Forest, North Carolina and urge citizens to support the activities planned for this event.

This the 19th day of April 2022.

Attest:

Mayor

(Deputy) Town Clerk





Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-540-

Submitted by: Candace Davis

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Proclamation Recognizing May 1 through 7, 2022 as the "53rd Annual Professional Municipal Clerks Week"

Recommendation:

Item Summary:

ATTACHMENTS

- [Proclamation_MunicipalClerksWeekApril202219.pdf](#)



PROCLAMATION

RECOGNIZING THE WEEK OF MAY 1 – MAY 7, 2022 AS THE 53rd ANNUAL PROFESSIONAL MUNICIPAL CLERKS WEEK

Whereas, The Office of the Professional Municipal Clerk, a time honored and vital part of local government exists throughout the world, and

Whereas, The Office of the Professional Municipal Clerk is the oldest among public servants, and

Whereas, The Office of the Professional Municipal Clerk provides the professional link between the citizens, the local governing bodies and agencies of government at other levels, and

Whereas, Professional Municipal Clerks have pledged to be ever mindful of their neutrality and impartiality, rendering equal service to all.

Whereas, The Professional Municipal Clerk serves as the information center on functions of local government and community.

Whereas, Professional Municipal Clerks continually strive to improve the administration of the affairs of the Office of the Professional Municipal Clerk through participation in education programs, seminars, workshops and the annual meetings of their state, provincial, county and international professional organizations.

Whereas, It is most appropriate that we recognize the accomplishments of the Office of the Professional Municipal Clerk.

Now, Therefore, I, Vivian Jones, Mayor of the Town of Wake Forest, do recognize the week of May 1 through May 7, 2022, as Professional Municipal Clerks Week, and further extend appreciation to our Professional Municipal Clerk, Deputy Town Clerk Terry Savary and to all Professional Municipal Clerks for the vital services they perform and their exemplary dedication to the communities they represent.

This the 19th day of April 2022.

Attest:

(Deputy) Town Clerk



Mayor



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-541-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Proclamation Recognizing "National Public Works Week" May 15-21, 2022

Recommendation:

Item Summary:

ATTACHMENTS

- [Proclamation_NationalPublicWorksWeekApril202219_21.pdf](#)



PROCLAMATION

RECOGNIZING NATIONAL PUBLIC WORKS WEEK MAY 15-21, 2022

WHEREAS, Public Works infrastructure, facilities and services are of vital importance to the health, safety and well-being of the people of the Town of Wake Forest, North Carolina; and

WHEREAS, such facilities and services could not be provided without the dedicated efforts of public work professionals, engineers, managers, the operations and maintenance staff who are responsible for and must plan, design, build, operate, and maintain the transportation, public buildings, and other structures and facilities essential to serve our citizens; and

WHEREAS, it is in the public interest for the citizens and civic leaders of the Town of Wake Forest to gain knowledge of and to maintain a progressive interest in the public works needs and programs of their respective communities.

WHEREAS, we join the American Public Works Association, Governor's Office of the State of North Carolina and other interested agencies and organizations in recognizing the contributions of public work professionals to the health, safety and welfare of the Town of Wake Forest, State of North Carolina and our nation;

NOW, THEREFORE, I, Vivian A. Jones, Mayor of the Town of Wake Forest do hereby proclaim May 15-21, 2022 as:

"NATIONAL PUBLIC WORKS WEEK"

This the 21st day of April 2021.

Attest:

Mayor

(Deputy) Town Clerk





Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-546-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Proclamation Recognizing Mother Rebecca Stallworth Inge

Recommendation:

Item Summary:

ATTACHMENTS

- [Proclamation_RecognizingMotherRebeccaStallworthIngeApril202219.pdf](#)



TOWN of
WAKE FOREST

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PROCLAMATION

RECOGNIZING MOTHER REBECCA STALLWORTH INGE

WHEREAS, Mother Rebecca Stallworth Inge through God's grace and the support of the Shaw University Community, Family and Friends, has returned to complete her Undergraduate Degree some Fifty Years later after having to withdraw for a family matter in the year 1967, and

WHEREAS, with her original Shaw University Student I.D. in tow, her faith in God, reenrolled to become a college student fifty years later at the ripe age off 71 years old, having never forfeiting her dream to complete her college degree, and

WHEREAS, at the age of 75 years old, will receive the last Undergraduate Degree in Philosophy and Religious Studies that Shaw University will bestow to a student on Sunday, May 8, 2022, and

WHEREAS, on behalf of the Town of Wake Forest, I am happy to extend our Congratulations and Best wishes to Mother Rebecca Stallworth Inge, a member of the class of 2022, Shaw University, and

NOW, THEREFORE, I, Vivian A. Jones, Mayor of the Town of Wake Forest, North Carolina, do hereby proclaim May 1, 2022 as

"MOTHER REBECCA STALLWORTH INGE"

In the town of Wake Forest, North Carolina, and encourage members of Kingdom Family International Church to participate in Mother Rebecca Stallworth Inge activities through this day, May 1, 2022.

IN WITNESS WHEREOF, I have hereunto set my hand and seal this the 19th day of April 2022.

Attest:

(Deputy) Town Clerk



Mayor



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-548-
Submitted by: Jeanette Johnson
Submitting Department: Public Works
Meeting Date: April 19, 2022

SUBJECT

Proclamation Recognizing April 22, 2022 as "Earth Day" in the Town of Wake Forest

Recommendation:

Read proclamation, acknowledge content of proclamation, and proclaim April 22, 2022 as Earth Day in the Town of Wake Forest.

Item Summary:

ATTACHMENTS

- [Proclamation_EarthDayApril202219.pdf](#)



PROCLAMATION

DESIGNATING APRIL 22, 2022 AS “EARTH DAY” IN WAKE FOREST

WHEREAS, April 22, 2022, marks 52 years of worldwide Earth Day celebrations; and

WHEREAS, the first Earth Day in 1970 recognized the importance of every person in preserving our natural resources; and that on the first Earth Day, 20 million Americans rallied for a healthy, sustainable environment; and

WHEREAS, all life forms on Earth have a right to a healthy, sustainable environment and as caretakers of the planet we all have an obligation to change human behaviors that contribute to environmental degradation to preserve the Earth’s beauty and natural resources; and

WHEREAS, this obligation extends not only to today’s caretakers but also to future generations of environmental caretakers who will inherit the planet from us; and

WHEREAS, Wake Forest is fortunate to have a 561 acres of parks, open space, natural land and trails which enrich the lives of both residents, visitors, and wildlife and provides habitat for various flora and fauna, natural resources, and many diverse recreational opportunities; and

WHEREAS, the Town of Wake Forest supports projects and programs that demonstrate and encourage natural resources conservation and sustainable efforts within the Town community; and

WHEREAS, many local community members, schools, businesses, and environmental organizations are working together in the interest of the planet to inspire intergenerational participation through local actions and global environmental consciousness; and

WHEREAS, The Town’s goal is to help build a future in which humans live in harmony with nature and wildlife by conserving Wake Forest’s and the Planet’s biological diversity; and

WHEREAS, the Town of Wake Forest proudly recognizes all who participate in Earth Day, for their dedication to taking a proactive role in shaping the future of our

environment and protecting the Town of Wake Forest's, and the World's, precious natural resources and various wildlife; and

WHEREAS, the Town of Wake Forest will continue to advocate for Earth Day and will continue to support and educate about environmental awareness, natural resource conservation, wildlife conservation, sustainable practices, and so much more related to the wellbeing of our planet.

NOW, THEREFORE, I, Vivian A. Jones, Mayor of the Town of Wake Forest do hereby proclaim April 22, 2022 as "Earth Day" in the Town of Wake Forest, and I encourage all citizens to become engaged in local and global efforts to help improve and protect our environment for all living beings.

This the 19th day of April 2022.

Attest:

(Deputy) Town Clerk



Mayor



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-557-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Proclamation Recognizing the 90th Birthday of Pidie Forte Lucas Green (added 4/18/2022)

Recommendation:

Item Summary:

ATTACHMENTS

- [Proclamation_90thBirthdayPidieForteLucasGreenApril202219.pdf](#)



**TOWN of
WAKE FOREST**

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**PROCLAMATION RECOGNIZING
THE 90th BIRTHDAY OF PIDIE FORTE LUCAS GREEN**

WHEREAS, Pidie Forte Lucas Green was born in Wake Forest on April 6, 1932, and was raised in a loving, hard-working family with 12 children.

WHEREAS, Ms. Green graduated from W.E.B. DuBois School in Wake Forest in 1950 and afterward attended a business correspondence school, and

WHEREAS, Ms. Green's dreams of a better life led her to New York City in the mid 1950's. She began working at Macy's Department Store in the fur department. She also worked part-time in the restaurant business, and

WHEREAS, while working in the restaurant business, Ms. Green drew the attention of a pharmaceutical salesman from North Carolina because of her excellent service and the large tips she received due to her service. He was impressed with the way she treated her customers and he offered her an opportunity to become a business partner with three gentleman, and

WHEREAS, in the early 1970's Ms. Green became a working partner at a new restaurant, 22 West in Harlem, New York. She used her skills, character, and business knowledge to become the manager and owner in partnership.

WHEREAS, 22 West was known as the spot where political activists gathered to discuss issues that affected the African American community and the nation. Ms. Green was able to meet and befriend many national leaders during her many years managing the restaurant. Leaders that she came to know included Adam Clayton Powell, Jesse Jackson, Cal Ramsey, Vernon Jordon, Percy Sutton, Al Sharpton, Malcolm X and Muhammad Ali. Ms. Green spent many years managing this famous venue which became a popular destination for tourists from all over the world and was a regular stop on many bus tours through Harlem, and

WHEREAS, Ms. Green retired and relocated to California where she and her husband, Paul, were leaders at Loveland Church in Rialto, California. After the loss of her husband, she returned home to Wake Forest, and

WHEREAS, Ms. Green enjoys spending time with family and friends, reading, attending church, and traveling. She was blessed with three children, Christine Manning (deceased), Thurman Lucas (deceased), and Stanley Lucas. She was also blessed with five grandchildren, Dr. M. Dion Manning, Paul "Scooby" Green, Jr., Freddie Bell, Davon Campbell, and Makayla Lucas. She especially enjoys spending time with her family, and

THEREFORE, I, Vivian A. Jones, Mayor of the Town of Wake Forest, welcome Pidie Forte Lucas Green once again to the Town of Wake Forest and celebrate her reaching the age of ninety years here in fellowship with family and friends. I urge everyone to celebrate this birthday with Ms. Green and congratulate her on a life well lived and shared, this the 9th day of April 2022.

Attest:


(Deputy) Town Clerk




Mayor



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-494-
Submitted by: Jennifer Currin
Submitting Department: Planning
Meeting Date: April 19, 2022

SUBJECT

Public Hearing on CPA-22-01, Revised Draft Town of Wake Forest Community Plan and Land Use Map (March 2, 2022 version)

Recommendation:

Item Summary:

ATTACHMENTS

- [BoC Agenda Summary 041922.pdf](#)
- [CPA-22-01 Staff Report 041922.pdf](#)
- [Attachment A: CPA-22-01 Application.pdf](#)
- [Attachment B: Summary of Revised Draft Changes.pdf](#)
- [Attachment C: Advisory Committee Comment Responses.pdf](#)
- [Attachment D: Planning Board Comment Responses.pdf](#)
- [Attachment E: Open House Comment Responses.pdf](#)
- [Attachment F: Engage Wake Forest Comment Responses.pdf](#)
- [Attachment G: Comments Received Since Planning Board Meeting.pdf](#)
- [Attachment I: Ordinance \(CPA-22-01\).docx](#)
- [Exhibit 1: DRAFT-Wake Forest Community Plan LQ \(2022-03-02\).pdf](#)
- [Exhibit 2: Proposed Draft Community Plan and Land Use Map Revisions.pdf](#)

Agenda Item: Public hearing on CPA-22-01, Revised Draft Community Plan and Land Use Map (March 2, 2022 version)

Agenda Summary: The Town of Wake Forest has seen significant growth since the Community Plan was adopted in 2009 and the updated Plan establishes a cohesive vision for the Town and how growth should occur over the next 10-20 years. The foundation of the Plan is rooted in community input and data analysis, which was obtained during the initial project phases, which included activities such as key stakeholder meetings, community questionnaire, creation of the existing conditions memo, visioning workshops, and the open house workshops. Several key themes emerged during the community engagement process and are the 9 proposed Plan goals: Balance the Mix of Uses; Encourage Growth & Activity in Downtown; Expand & Maintain Wake Forest's Green Spaces; Establish Safe & Connected Public Transit Options; Maintain the Historic Small-Town Charm; Provide Diverse Housing Opportunities; Support a Pedestrian-/Bicycle-Friendly Community; Support Strategic Growth; and Support Unique, Thriving Businesses.

Attachments: See Staff Report



Staff Report

Case CPA-22-01: Community Plan and Land Use Map

Meeting Date	April 19, 2022
Requested Actions	Public hearing on and consideration of CPA-22-01, Revised Draft Community Plan Update and Land Use Map (March 2, 2022 version)
Case Manager	Jennifer Currin, Assistant Planning Director
Planning Board Recommendation	The Planning Board, at their March 8, 2022 meeting, unanimously recommended approval with the following conditions: 1. Correct the spelling of "Country" on page 50. 2. Include an additional action item under Community Facilities. New action item 13-14 would state something like: Work with NCDOT on traffic mitigation, congestion reduction, and roadway improvements. Encourage fast track and/or speed up of existing projects including Rogers Road project.

PUBLIC MEETINGS

Public Comment Session	Public Hearing
January 31, 2022	April 19, 2022

PUBLIC COMMENTS

At the January 31, 2022 public comment session, several individuals spoke about the need for additional open space, particularly on the west side of Capital Boulevard, protection of watersheds, and that they were supportive of conservation subdivisions. Representatives of The Church Initiative, located at 250 S. Allen Rd., noted that classifying this area as mixed residential would lead the parcel being designated as nonconforming.

CASE INFORMATION

Applicant	Town of Wake Forest 301 S. Brooks Street Wake Forest, NC
<i>See Attachment A for a copy of the application.</i>	

CASE SUMMARY

In July 2020, the Town contracted with Houseal Lavigne to update the Wake Forest Community Plan, which was adopted in 2009. The draft Plan establishes a cohesive vision for the Town and how growth should occur over the next 10-20 years. The foundation of the Plan is rooted in community input and

data analysis, which was obtained during the initial project phases and included activities such as key stakeholder meetings, community questionnaire, creation of the existing conditions memo, and visioning workshops. Several key themes emerged during the community engagement process and are the 9 proposed Plan goals: Support Strategic Growth; Balance the Mix of Uses; Maintain the Historic Small-Town Charm; Provide Diverse Housing Opportunities; Support a Pedestrian-/Bicycle-Friendly Community; Establish Safe & Connected Public Transit Options; Support Unique, Thriving Businesses; Encourage Growth & Activity in Downtown; and Enhance & Maintain Wake Forest's Green Spaces. An action matrix with the action item, relevant goal and timeline is included to provide step-by step guidance for the Town and the community.

STAFF RECOMMENDATION

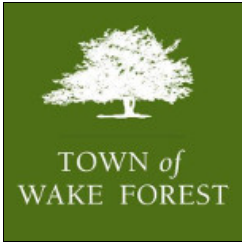
Staff recommends approval of the March 2, 2022 revised draft Community Plan and Land Use Map (Exhibit 1) with changes as proposed (Exhibit 2).

ATTACHMENTS

Attachment A:	Application
Attachment B:	Summary of Revised Draft Changes
Attachment C:	Advisory Committee Comment Responses
Attachment D:	Planning Board Comment Responses
Attachment E:	Open House Comment Responses
Attachment F:	Engage Wake Forest Comment Responses
Attachment G:	Comments Received Since Planning Board Meeting
Attachment H (Link):	January 11, 2022 Draft Community Plan
Attachment I:	Ordinance

EXHIBIT

Exhibit 1:	March 2, 2022 Revised Draft Community Plan
Exhibit 2:	Proposed Draft Community Plan and Future Land Use Map Revisions



Comprehensive Plan Amendment

Comp Plan Amendment

Town of Wake Forest, NC

301 S. Brooks St.

Wake Forest, NC 27587-2932

TEL (919) 435-9510 | FAX (919) 435-9539

Project Overview

#693789

Project Title: Town of Wake Forest Community Plan and Land Use Map

Jurisdiction: Town of Wake Forest (Wake County)

Application Type: Comprehensive Plan Amendment

State: NC

Workflow: Comp Plan Amendment

County: Wake

Checklist - Comprehensive Plan & UDO Amendment

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

[VIEW COMPREHENSIVE PLAN & UDO AMENDMENT
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?: No

This type of project requires a pre-application conference be completed prior to official submittal. 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 and Time:

Staff Member Met With:

Project Tracking ID:

Data - Basic Location

If your Comprehensive Plan Amendment is associated with specific property(s) please answer the following questions. If not, proceed to the next page.

Project/Development Name:

Project Address or PIN:

Tax PIN:

Zoning:

Current Zoning Overlay:

Town Limits:

Projects falling outside the limits of the Town or ETJ will be required to submit an annexation petition in conjunction with their project

submittal. Please return to the home screen and select **Annexation Petition** from the application type drop down.

Land Use:

Acreage:

GIS Acreage:

Project Contact - Applicant/Owner

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

Jennifer Currin
Town of Wake Forest
401 Elm Avenue
Wake Forest, NC 27587
P:(919) 5546100
jcurrin@wakeforestnc.gov

Amendment Type

Please answer the below questions to provide reviewers an overview of the application. Additional information may also be provided through uploading an attachment.

Plan Being Amended: Community Plan

Type of Amendment: Text,Map

Description of Request:

Update the entire Community Plan to reflect current community conditions

Current Plan Language:

Reference 2009 Community Plan

Applicant Requested Language:

Reference January 2022 Draft Community Plan and Land Use Map

Justification of Amendments:

Update the entire Community Plan to reflect current community conditions

Revised Draft Community Plan
Summary of Changes

Page # 1/11/22 Draft	Page # 3/2/22 Draft	Type of Revision	Revision Summary
Cover	Cover	Graphic	Cover images modified.
ii	ii	Text	Planning Board members alphabetized, Planning staff listed.
3	3	Text	Timeline updated.
4	4	Text	Grammatical corrections.
4 & 5	4 & 5	Graphic	MSA added to map.
8	8	Text	Clarifications.
9	9	Graphic	Revised area from open space to redevelopable/vacant land.
10	10	Text	Grammatical corrections.
11	11	Graphic	Legend Clarification.
14	14	Text	Grammatical correction.
14-21	14-21	Format	Layout modifications.
21	21	Graphic	Table label revised.
22	22	Text	Clarifications.
24	24	Text	Note removal, grammatical clarification, and revision to Community Advisory Panel paragraph.
25	25	Text	Grammatical correction.
24-27	24-27	Text	Updated Open House information.
25-26	25-26	Graphic	Image updates.
28	28	Text	Clarification goals aren't prioritized. Grammatical corrections.
30-31	30-31	Text	Alphabetized goals and revised goal related to green spaces.
32	32	Text	Revised text.
	33	Text	Revised text.
33	34	Graphic	Revised Urban Service Area boundary and revised map legend.
35		Graphic	Removed Growth Areas Map.
35		Text	Revised Text.
37	37	Text	Provided hyperlink and added sentence.
37	37	Graphic	Image to be updated prior to final draft.
38	38	Text	Provided hyperlink and added professional services as supporting use.
38	38	Graphic	Image to be updated prior to final draft.
39	39	Text	Added professional services as supporting use.
39	39	Graphic	Updated images.

Revised Draft Community Plan
Summary of Changes

Page # 1/11/22 Draft	Page # 3/2/22 Draft	Type of Revision	Revision Summary
40	40	Text	Clarified text related to 2-story buildings.
42	42	Graphic	Updated images.
43	43	Graphic	Updated images.
45	45	Graphic	Updated images.
47	47	Graphic	Map revisions and legend updated.
48	50	Text	Text updated to indicate areas are not prioritized. Area #1 revised.
49	51	Text	Grammatical corrections.
50	54	Text	Text updated to include office, biopharma, and life sciences in Tech Park description.
55 & 77	48-49	Format	TOD and Activity Centers Map revised and relocated in document.
59	61	Graphic	Map revised.
60	62	Text	Additional Consideration sections hyperlinked.
62	64	Text	Key consideration revised and added to Residential Character.
64	66	Text	Key consideration revised and added to Commercial Development.
65	67	Text	Clarification to key consideration in Minority & Women-Owned Businesses.
66	68	Text	Key consideration revised in Setbacks.
66	68	Text	Key considerations revised in Parking Lots.
66	68	Graphic	Graphic updated.
67	69	Text	Grammatical clarification in Screening & Buffering.
68	70	Text	Key consideration revised and added to Community Character.
68	70	Text	Key consideration added to Utility Lines.
69	71	Text	Key consideration revised in Historic Preservation.
70	72	Text	Key considerations revised in Community Facilities.
71	73	Graphic	Public Safety facility revised on map and Library color revised.
75	74	Text	Key recommendations added and revised to Public Transit.
75	74	Graphic	Images updated and to be updated prior to final draft.
76	75	Text	Clarification in S-Line text and map legend.
65	76	Text	Revision to text and key recommendations added to Capital Boulevard.
72	77	Graphic	Connectivity index graphic revised and image updated.
73	78	Text	Text revised in Sidwalks & Multi-Use Paths.
73	78	Graphic	Images to be updated prior to final draft.
74	79	Text	Key recommendations added to Bikeways, Greenways & Trails.

Revised Draft Community Plan
Summary of Changes

Page # 1/11/22 Draft	Page # 3/2/22 Draft	Type of Revision	Revision Summary
74	79	Graphic	Map legend to be updated prior to final draft.
	80	Text	Local Food Systems added.
	80	Graphic	Images updated prior to final draft.
	81	Text	Conservation Design added.
76	75	Graphic	Image updated.
78	82	Text	Key considerations revised in Green Space Preservation.
79	83	Text	Key consideration added to Tree Canopy.
80	84	Text	Grammatical corrections.
81	85	Text	Key considerations revised and added to Sustainable Development.
83	87	Text	Key considerations revised and added to Tourism.
84	88	Text	Revised Gateway language.
85	89	Text	Revised Family-Friendly to Attractions for All.
87	91	Text	Grammatical corrections.
88	92	Text	Clarified language in Regular Updates.
89	93	Text	Revised Potential Funding Sources and added Partner information under the Action Matrix paragraph.
90	94	Text	Grammatical corrections in Land Use Plan Action Items.
90	94	Text	Revised goal alignment for Housing Affordability.
90	94	Text	Added action items to Residential Character and revised goal alignment.
90	94-95	Text	Revised goal in Senior Housing.
91	95	Text	Added action items to Commercial Development, revised goal alignment, and revised time frames.
91	96	Text	Revised action item and time frame in Minority & Women-Owned Businesses.
92	96	Text	Grammatical clarification in Parking Lots.
92	97	Text	Revised action item in Screening & Buffering.
93	97	Text	Revised action item in Community Character.
93	98	Text	Added and revised action items to Utility Lines.
93	98	Text	Revised action item in Historic Preservation.
94	98-99	Text	Added and revised action items in Community Facilities.
	99	Text	Added and revised action items in Public Transit.
	99	Text	Added action items for Capital Boulevard.
94	99	Text	Grammatical clarification in Street Connectivity.

Revised Draft Community Plan
Summary of Changes

Page # 1/11/22 Draft	Page # 3/2/22 Draft	Type of Revision	Revision Summary
94	99	Text	Revised action item in Sidewalks & Multi-Use Paths.
	100	Text	Added action items for Bikes, Greenways & Trails.
	100	Text	Added action items for Local Food Systems.
	100	Text	Added action items for Conservation Design.
95	100	Text	Added and revised action items in Green Space Preservation.
95	101	Text	Added and revised action items in Tree Canopy.
95-96	101-102	Text	Added and revised action items in Sustainable Development. Revised goal alignment for an action item.
96	102-103	Text	Added and revised action items in Tourism.
97	103	Text	Added and revised action items in Downtown Wake Forest.
	Cover	Graphic	Added cover to back of document.
Overall		Text	Font updated on section pages.
Overall		Graphic	Map dates revised to Jan. 1, 2022.
Overall		Text	Updated revision date throughout document.

Community Plan Advisory Committee
January 25, 2022 Meeting
Comments on January 11, 2022 Draft

Page	Comment	Response
4	Add MSA outline to the Regional Context map instead of research triangle - accentuate the WF is part of the activity and positivity in this area. Highlight RDU more.	MSA added to map.
35	Growth Areas Map - undeveloped/unincorporated areas have been developed as fast as undeveloped/incorporated areas. Is it valid to prioritize one over the other?	Removed Growth Area Map.
37	Put Land Use Map beforehand on page 37	No revision. Did not relocate due to document consistency.
81	Increase incentives for SolSmart - density bonuses, rainwater rewards, etc. - See EPA incentives.	This recommendation is already listed under Sustainable Development.
81	Should we talk more energy and water incentives? Making sure that the water is clean and people are conserving. Especially with growth.	Under Sustainable Development section, added key recommendation.
90-97	Consider adding partners to action matrix	Additional clarification added to Page 93 under Action Matrix.

Planning Board Comments
January 31, 2022 Meeting
Comments on January 11, 2022 Draft

Page	Comment	Response
9	Existing Land Use Map - update existing land use of Loading Dock	No revision. Site was under construction as of Jan. 1, 2022.
9	Existing Land Use Map - Show parcels currently under construction as a hatch to make it less outdated	No revision. Under construction is not a land use classification.
11	Current Zoning Map - Reorganize zoning districts in map legend to increase in intensity and change in color of the map	No revision. Legend is consistent with standard organization methodology.
31	Goals - The expansion of open space is not accentuated enough in the Plan's goals. Need to make stronger. (No specific change requested)	Placed goals in alphabetical order and revised goal pertaining to open space.
47	250 S Allen Road / The Church Initiative - Rezoned as NMX-CD with personal services. Intended to prevent adjacent multifamily. Concern about it becoming non-conforming with it now becoming labeled as Mixed Residential	Added Professional Services as a supporting use to Mixed Residential and Transit Supportive Residential land use designations. A land use map does not create nonconformities.
48	The Joyner Property / Old Golf Course - Currently an Open Space PUD and in Watershed Protection. Request to change to Parks and Open Space and not a Priority 1 development opportunity. Revise from Residential Area Plan and maps.	Revised future land use designation to Conventional Residential. Updated the Residential Area Plan text and title related to Area #1. Removed the Growth Strategies Map. Added Additional Consideration section, Conservation Design.
57	Renaissance Center - Plan says, "If the strip mall remains.." - take this out as improvements have been made to the facility.	Revised language to "If the owners were to choose to develop, below are alternatives to consider:".
64	Would like to address the proliferation of monolithic retaining walls. Aesthetically not pleasing, reduces commercial character. How can we reduce these in the Town? Add recommendation.	Added a key recommendation in Community Character.
72	Street Connectivity Graphic - Fix the dot placement near the intersection as it looks like it could cause traffic accident	Revised graphic.
78	Green Space Preservation - Unclear what "conservation areas" entails	No revision. Provided comment to UDO project manager so conservation area can be defined in UDO update.
84	Gateway Map - Add a gateway: Highway 98 and Durham Road – western entrance into Town.	Potential gateway added to map.
89	Action Matrix - What does ongoing mean?	Defined ongoing.

Planning Board Comments
January 31, 2022 Meeting
Comments on January 11, 2022 Draft

Page	Comment	Response
	Request by various participants to address expansion of park space and preservation of open space more. Comments include: Like the small-town feel, open space. Fear of losing open space and this beautiful community. Growth is inevitable but must protect open space. Expand green/open space.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
	Sustainable Growth is not supported in current draft. Global warming is here and Town needs to address it. Various climate change issues are occurring across the world.	No revisions. Draft Plan includes recommendations on Sustainable Development, Tree Canopy, and Green Space Preservation.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Received written comments related to open space, identification of property as mixed residential on pages 48-49, watershed overlay districts, and removing Joyner property as priority area on pages 36-37.	Map revised to Conventional Residential for old golf course property. Growth areas map removed. Goals alphabetized and open space goal revised.
	Received written comments related to 238, 250 and 306 S. Allen Rd.	Professional Services added as a supporting use to Mixed Residential and Transit-Supportive Residential land use descriptions. For 306 S. Allen Rd., map revised to Mixed Residential and Residential Area Plan description #6 states multifamily development should be avoided.
1-1	Update the current UDO to better define Green/Open Space. More specifically include PUDs and private protected properties.	No revision since comment related to the UDO and a zoning classification.
17-1 to 17-4	Green space preservation should be a #1 priority as vocalized by the Wake Forest residents in the Zoom meetings. This item should be moved to the front of this Action Matrix and not "buried" back on page 78. Green space/open space preservation should be listed first out of the 9 items of importance (goals), not listed at the end of this page. Why only 4 action items listed here? List more specific measurable tasks needed to achieve these goals. Example: Create an open/green space such as a conservation area or park located in the northwest quadrant of Wake Forest where non are currently located.	The goals are not ranked/prioritized and are now alphabetized in the Plan. An action item to update the Parks, Recreation, and Cultural Resources Master Plan has been added to the action matrix. When the Parks, Recreation, and Cultural Resources Master Plan is updated, a needs assessment will be conducted that will determine where additional park amenities, if any, are needed throughout Town.
	Handout provided with proposed language updated Residential Area Plan #1.	The proposed language for Area #1 in the Residential Area Plan was revised.
	Received written comments that a individually owned property off Chalk Rd. was improperly designated as future open space.	Map revised to Conventional Residential.
	Received written comments from Urban Forestry Board (UFB) related to tree canopy and green space preservation.	No revision since ordinance related comments. Comments provided to UDO project manager.
6	Add to screening and buffering "The character of our Town includes its trees. Trees are a buffer.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Retain as much natural area as possible. Make natural areas in every small pocket area possible.	The green space goal was modified.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Affordable housing planned in large neighborhoods that take 10 years to build/finish will not be affordable anymore. Also lack of building materials is slowing down all currently approved development projects.	No revision since comment related to the Affordable Housing Plan that is being developed.
	Excellent idea of senior cottage home community with single floor. This is much needed.	No revision. Comment forwarded to Affordable Housing Plan project manager.
	Provide more access for residents of Pineview Estates to access Ligon Mill and Lowes without needing to travel on 98 Bypass.	No revision. Provided comment to Engineering Department.
	Widen 98 to a full 2 lanes past Jones Dairy headed toward Bunn. All the new developments will make this necessary.	No revision. The Comprehensive Transportation Plan (CTP) identifies ultimate roadway cross sections. As development occurs, roadway widening will occur.
	Wider setbacks from the road to preserve trees and landscaping.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Suggest that specific uses within a zoning area have larger setbacks (i.e. urgent care and nursing homes).	No revision since ordinance related comment. Comment provided to UDO project manager.
	Need infrastructure to match growth (roads, schools, fire, police). Growth is outpacing this.	No revision. Action item 13-1 recommends expanding Town's facilities and services concurrently with new growth. As development occurs, roadway widening occurs.
	Current development has allowed too many apartments.	No revision. The Plan identifies that there is a strong need to increasing housing choices and attainability for all income groups, stages of life, and backgrounds. Multifamily development is also identified as a primary use in areas supported by transit.
	More open space, less dense development! Wider setbacks. Keep the Forest in Wake Forest.	Green space goal was modified. Comment related to setbacks provided to UDO project manager.
	There needs to be better integration of land use and transportation planning. Zoning and development approval processes should be required to consider transportation impact, as well as environmental.	No revision. Transportation planning does account for land use designations and including a future land use map in the Community Plan will assist with staff informing the Triangle Regional Model for transportation modeling.
	The roads in Wake Forest need line re-painting. Night time and rain makes it and it is difficult to see where to go. This would cut down and reduce accidents.	No revision. Provided comment to Engineering Department.
	Deeper setbacks.	No revision since ordinance related comment. Comment provided to UDO project manager.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Neighborhood Commercial - Needs larger setbacks. We want tree lined boulevards.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Wider setbacks, more open space.	Green space goal was modified. Comment related to setbacks provided to UDO project manager.
	NW corner of Royal Mill Ave. and Traditions- unclear what is being developed. Four unit buildings not wanted with single-family detached to the north.	No revision. Information on accepted development applications in review is available on the Interactive Development Map.
	Make Wake Forest Reservoir a family park (no drug dealers).	No revision. The Capital Improvement Plan (CIP) notes that Parks, Recreation and Cultural Resources will complete a master plan for the Wake Forest Reservoir property.
	Need more open space, need less dense development, need wider setbacks.	Green space goal was modified. Comment related to setbacks provided to UDO project manager.
	More park space, better and longer setbacks, smaller development	Added action item to update Parks, Recreation, and Cultural Resources Master Plan. Comment related to setbacks provided to UDO project manager.
	Former Wake Forest golf club - Please keep as open space; Trees and wildlife are converting this property into its best use-open space.	Map revised to Conventional Residential. The proposed language for Area #1 in the Residential Area Plan was revised. The Community Plan is a guiding document and is not proposing to amend any zoning entitlements.
	Acquire land for future parks. We are growing.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
	Dense housing projects create future issues (crime, etc.).	No revision. The Plan identifies that there is a strong need to increasing housing choices and attainability for all income groups, stages of life, and backgrounds. There is no direct correlation between density and crime.
	Building houses that cost \$350,000 and apartments that cost \$1,500/month is NOT affordable housing.	No revision. Affordable Housing Plan is being developed. Comment forwarded to Affordable Housing Plan project manager.
	Keep the old Wake Forest golf course property natural or add it to the Wake Forest park system. PUD in place already to leave it natural.	Map revised to Conventional Residential. The proposed language for Area #1 in the Residential Area Plan was revised.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Don't create more downtowns. Enhance and improve our current Downtown.	No revision. Action items 26-1 through 26-11 (formerly 22-1 through 22-10) address Downtown.
	Keep low income away from senior citizens communities.	No revision. The Plan identifies that there is a strong need to increasing housing choices and attainability for all income groups, stages of life, and backgrounds throughout Wake Forest.
	Try and get road repairs (widen) or help with interchanges to add turn lanes. Work with state to get more funding or add fees to developments.	Paragraph added to page 35 related to infrastructure. The Town actively coordinates with NCDOT; and Wake Forest does not have authority to collect transportation impact fees.
	Your plan does not reflect your goals to maintain small town feeling and green space. The plan needs to be revised.	Green space goal was modified.
	Strengthen and purchase more parks via bond issue, tax overlays, encourage owners to donate to land conservancy.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
	The present roads can't accommodate the heavy traffic on Chalk Rd. & Legacy Greene Ave. Parents picking up children at Franklin Academy park cars on Chalk to pick up their kids thus blocking and making it extremely dangerous to get on and move in any direction between 2-4 pm. Traffic doesn't slow down to let one get out on the main road. Believe me, someone will get into a serious accident or fatality-and it's coming, soon. Lines on the road are needed by NCDOT or Wake Forest maintenance.	No revision. Comment regarding roadway striping provided to Engineering Department.
	Avoid the urban landscape style that takes away from the forest of Wake Forest.	No revision since ordinance related comment. Comment provided to UDO project manager.
	More green space for recreation. Consider what you doing to keep the small town feel. Current construction does not support this goal.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
	When is Harris Rd. going to be walkable? Going into town you take your life into harm. The kids like to go to the ice cream place and no sidewalks.	No revision. Please reference the Future Pedestrian and Greenway Network Maps in the Comprehensive Transportation Plan.
	The vision does not align with Community Plan.	No revision.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	More parks on NW side of Capital.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
	Traffic getting worst. What with more apartments where will cars go.	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
	What about schools, police, fire, water, waste?	No revision. The draft Plan includes key recommendations in the Community Facilities section related to expanding Town facilities concurrently with new growth, in addition to continuing to work with regional educational entities.
	Stop cutting down all the trees in Wake Forest.	No revision. Action item 22-6 (formerly 18-6) included.
	From what I see, I'm in the area where there is going to be a lot of residential building. Traffic is horrendous now, do you really think we will be able to handle it?	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
	No more townhomes. The population density is becoming unsustainable for a town the size of Wake Forest.	No revision. The Plan identifies that there is a strong need to increase housing choices and attainability for all income groups, stages of life, and backgrounds.
	The main concern I have right now is the infrastructure is not keeping up with construction. Approval of zoning changes needs to be looked at stopping some construction so the infrastructure is there should come into consideration. Making the current population wait for the catch up is not acceptable.	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth. If development proposals complying with CTP, Unified Development Ordinance, and Traffic Impact Analysis recommendations, staff has no legal authority to deny application.
	We are opposed to loss of trees in our adjoining land and especially 4 story apartments. This will create noise, lights and traffic. This is not what aging people look forward to.	No revision. Action item 22-6 (formerly 18-6) included. Multifamily is also only proposed in areas of Town supported by current or future transit.
	This plan ruins the character of Wake Forest and puts us at risk of becoming like the other municipalities that lost their history.	No revision. The Community Plan provides a guide for how growth should occur in order to balance the needs of the entire community while preserving its small-town charm.
	Forestville, Burlington Mills, Rogers Rd. all are very congested and getting worse.	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Infrastructure is not keeping up with development. Please think twice about approving zoning changes.	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
	Suggest "conservation" conventional UDO residential due to open space and zoning to help stormwater runoff.	Added action item to add cluster developments to UDO. Added section on conservation design/cluster development.
	Apply Conventional Residential to perimeter of Joyner property. Match existing properties that surround this property.	Map revised to Conventional Residential.
	The Joyner property is not appropriate for mixed residential development, except perhaps to the immediate area of US1/Capital Blvd. Why isn't it designated for conventional residential like Jenkins Rd./Capital Blvd.?	Map revised to Conventional Residential.
	Why is the development of the Joyner property a top priority (1-2 years) when the US1/Capital Blvd. expansion will bring havoc to all development on the perimeter of the property?	Growth Areas Map removed.
	Change designation of Joyner property from mixed residential to conventional residential at least on the perimeter abutting existing lots.	Map revised to Conventional Residential.
	Need for conservation subdivisions in the watershed areas-put in UDO.	Added action item to add cluster developments to UDO. Added section on conservation design/cluster development.
	Please keep forest in Wake Forest.	No revision. Action item 22-6 (formerly 18-6) included.
	Too many people moving here too fast. Traffic, schools, the watershed, the clear cutting, loss of natural habitat, even noise pollution is a problem here now.	No revision. The Community Plan provides a guide for how growth should occur in order to balance the needs of the entire community while preserving its small-town charm.
	How can we be bicycle/pedestrian friendly? Traffic is heavy and dangerous in most areas.	No revision. Please reference the Future Pedestrian and Greenway Network Maps in the Comprehensive Transportation Plan.
	We have a very active mountain biking community that want soft trails. Please don't pave a trail around reservoir.	No revision. The Comprehensive Transportation Plan (CTP) provides an action item to "evaluate the use of soft trails and paved surfaces in the development of the Wake Forest Reservoir master plan while ensuring residents with varying ability level access to the reservoir."

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Any thoughts regarding street legal golf carts?	No revision since this is a Code of Ordinance related item. The Board of Commissioners has previously considered a request to allow golf carts on Town streets and determined it was not permitted. Low Speed Electric Vehicles (LSEV) are permitted and for more information on LSEVs, contact the Police Department.
	Maintaining historic charm is essential to maintaining the character of the town. Traffic is one of the biggest eroders of historic preservation. The traffic on North and South Main needs to be curbed.	No revision. The Community Plan provides a guide for how growth should occur in order to balance the needs of the entire community while preserving its small-town charm.
	More schools for our children.	No revision. Key recommendation in "Community Facilities" section states the Town will continue to work with regional educational entities.
	Any thoughts on adding public art space?	Action item 24-11 added.
	Maintain the greenspace around Wake Forest reservoir or turn it into a community park (hiking trails, biking, canoe docks, etc.).	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
	Stop building.	No revision. The Community Plan provides a guide for how growth should occur in order to balance the needs of the entire community while preserving its small-town charm.
	Compassionate development? Don't displace the poor like the debacle of the trailer park. Where is our homeless shelter? We're going to need a big one.	No revision. Affordable Housing Plan is being developed.
	How will all these new subdivisions and apartments get water?	No revision. Town of Wake Forest and City of Raleigh have an approved merger agreement, which includes water and sewer allocation for areas included in Community Plan boundary.
	Larger interactive playgrounds are integral to bringing people together. Our children and families need a central place to meet one another and play. Need to be located in town, not far like Joyner and Flaherty. Look at Cary for inspiration. Also Laurel Hills park in Raleigh and Kids Together.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Original 10%? Woods as part of every development.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Need more parks identified. Keep forest in Wake Forest. Setbacks need to be bigger (further from street).	Added action item to update Parks, Recreation, and Cultural Resources Master Plan. Comment related to setbacks provided to UDO project manager.
	Affordable housing goals should include all those in need. Equity ie minorities is not Wake Forest. Stop virtue signaling.	No revision. The Plan identifies that there is a strong need to increasing housing choices and attainability for all income groups, stages of life, and backgrounds. The Town is currently developing a new Affordable Housing Plan, which will provide tools and strategies for improving housing affordability in Wake Forest.
6-1 to 6-4	This will support our Town's ESG score. Well done!	No revision.
	When developing, instead of grazing the land, leave trees. A community co-op investment company for residents to collectively buy the land and leave as open space.	No revision. Action item 22-6 (formerly 18-6) included.
	Working with surrounding communities Rolesville and Youngsville would be beneficial to helping Wake Forest maintain our own character. Having these areas grow the residents utilize our infrastructure.	No revision. Agency partners, like Rolesville and Youngsville, were engaged during the Community Plan process to receive input. The Town actively coordinates with different agencies to coordinate.
	I feel that there has been plenty of development in the short time I have lived here. Is there going to be sufficient infrastructure for all this? And what about future traffic?	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
	Community service considerations: schools, homeless shelter, expanding greenspace, hospitals, fire dept	Green space goal revised.
	We need more parks.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
	There are no waterways marked. Was an environmental plan considered within the scope of the development plan?	No revision. Specific environmental features are evaluated when development plans are submitted for review.
	Please don't strip the land. Build the neighborhood roads but leave some trees (i.e. Camberly Subdivision).	No revision. Action item 22-6 (formerly 18-6) included.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Stop building	No revision. The Community Plan provides a guide for how growth should occur in order to balance the needs of the entire community while preserving its small-town charm.
	Maintain area around reservoir for public use (hiking, biking, etc.). Also, protects water from runoff.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
	I agree. Make the land developers identify old growth forest and save old trees.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Regulate the land developers to not be able to clear cut land. I agree.	No revision. Action item 22-6 (formerly 18-6) included.
	Revamp vacant strip mall area in downtown near CVS.	No revision. Please reference the Northeast Area Plan for a land use map designation and guidance on this area.
	More walking connections over railroad tracks (behind storage unit) for students from NE community to walk to the high school.	No revision since comment related to the Comprehensive Transportation Plan. Provided comment to Transportation Planner.
	Need more single family or patio homes and less high density housing.	No revision. The Plan identifies that there is a strong need to increasing housing choices and attainability for all income groups, stages of life, and backgrounds.
	Please overlay a topographic map that outlines the waterways. Ensure their protection in the buffering section.	No revision. Specific environmental features are evaluated when development plans are submitted for review.
	With Wake Forest growth and cost of housing, Wake Forest needs a homeless shelter (maybe strip mall area near CVS downtown).	No revision. Housing cost comment forwarded to Affordable Housing Plan project manager.
	Compost food waste program from the town.	Action item 23-10 added.
	Action point to be added: Concentration on environmental and water impact and mitigation thru green infrastructure.	No revision. Action items 23-1 through 23-17 (formerly 19-1 through 19-9) address Sustainable Development.
	Stop building.	No revision. The Community Plan provides a guide for how growth should occur in order to balance the needs of the entire community while preserving its small-town charm.
	Take out "redevelopable" from vacant land on map key.	Redevelopable/Vacant Land category text was revised to provide clarification.
	Infrastructure before development! In 4 years a 5 min drive from Heritage to Rt. 1 can now take 20 mins.	Paragraph added to page 35 related to infrastructure.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Make it easier for residents and businesses to recycle and compost as many places already do. Copy them.	Action item 23-10 added.
	Soft trails for mountain biking.	No revision. The Comprehensive Transportation Plan (CTP) provides an action item to "evaluate the use of soft trails and paved surfaces in the development of the Wake Forest Reservoir master plan while ensuring residents with varying ability level access to the reservoir."
	We need cleaner bathrooms at campsites.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
	Don't extend Foundation Drive across the 94-acre park.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
	A great amount of energy needs to be invested into creating wildlife spaces, gardens, wildlife foods. We share land with so many creatures. There is many studies on habitat destruction and waning wildlife populations. Pollinator gardens, community gardens-these are essential for the next generation.	Revised Green Space Preservation section to mention wildlife habitat.
	This area's zoning change to GR3. Potentially makes the most adverse impact. It is important to keep open space for animal habitat, traffic flow.	Map revised to Conventional Residential for old golf course property.
	Require preservation of more trees in developments. Stop clearcutting and bulldozing. Require preservation of open space that's not the unbuildable leftovers.	Green space goal revised. Action item 22-6 (formerly 18-6) included.
	Wake Forest is doing a great job of growing the tax base and ruining the allure and attraction that brought your forebearers to this once quaint town.	No revision. The Community Plan provides a guide for how growth should occur in order to balance the needs of the entire community while preserving its small-town charm.
	How will infrastructure support this? Ex. Rogers Rd. and Heritage Lake Rd., 98 Bypass at Heritage Lake Rd.	Paragraph added to page 35. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
	The reason we moved here "small town feel". This will look like cluster of apts and houses. Also, I think it's a joke "impervious soil" with all the building. I vote and say stop.	No revision. The Community Plan provides a guide for how growth should occur in order to balance the needs of the entire community while preserving its small-town charm.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Keep old golf course as open space. Do not allow owner to develop it. He knew it could only be a golf course or open space when he bought it for \$350,000. Town should buy it.	No revision. The Community Plan is a guiding document and is not proposing to amend any zoning entitlements.
	The section of Rogers Rd. from Forestville Rd. to Rolesville is not pedestrian or bicycle friendly [sic] .	No revision. Please reference the Future Pedestrian and Greenway Network Maps in the Comprehensive Transportation Plan.
	There are no parks/open spaces west of US1.	An action item to update the Parks, Recreation, and Cultural Resources Master Plan has been added to the action matrix. When the Parks, Recreation, and Cultural Resources Master Plan is updated, a needs assessment will be conducted that will determine where additional park amenities are needed throughout Town.
	Leave Wake Forest golf course open.	No revision. The Community Plan is a guiding document and is not proposing to amend any zoning entitlements.
	Planning of bus stops to business walkways.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Under/over road walkways for pedestrians/bikes: RT 1 & 98, 98 & N. Main St., Franklin St. and Rogers Rd., Forestville Rd. and Rogers Rd., etc.	No revision. Please reference the Future Pedestrian and Greenway Network Maps in the Comprehensive Transportation Plan.
	Heavy traffic from west and north of Wake Forest will make more residential building more of a problem.	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
	Given the multiple mention of public art, it should be in the goals.	Action item 24-11 added.
	Mention water quality in goal or related objective.	No revision. Water quality mentioned in sections such as Parking Lots and Sustainable Development.
	Increase preserved green space, not just enhance and maintain.	Revise goal to Enhance, Expand and Maintain Wake Forest's Open Spaces.
	Perhaps partner with Youngsville to preserve this special area.	No revision. The Town actively coordinates with area partners, such as Youngsville, Rolesville, and Raleigh.
	Remove Lake Holding (pond) and townhomes from Transit Supportive. Mixed residential is more appropriate.	Revised to Mixed Residential.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Let's truly maintain the "small town" charm and feel for all of Wake Forest instead of just the Downtown Area.	No revision. The Community Plan provides a guide for how growth should occur throughout Wake Forest in order to balance the needs of the entire community while preserving its small-town charm.
	Stop building.	No revision. The Community Plan provides a guide for how growth should occur throughout Wake Forest in order to balance the needs of the entire community while preserving its small-town charm.
	Public parking for bus stops needed.	No revision since ordinance related comment. Comment provided to UDO project manager.
15-1 to 15-7	Connect bike trails throughout Wake Forest. Including new trails west of Capital.	No revision. Please reference the Future Pedestrian and Greenway Network Maps in the Comprehensive Transportation Plan.
15-1	Multi-use trail along Dunn Creek. Complete trail, please.	No revision. Dunn Creek Phases 3 & 4 are included in the Capital Improvement Plan (CIP).
	Need more greenway connectivity - should be able to take Smith Creek to Neuse River Trail.	No revision. Please reference the Future Greenway Network Map in the Comprehensive Transportation Plan.
15-2	Is there any plan to add a bicycle lane when N White Street gets repaved? What is process to request bike lane be added?	No revision. A multi-use path is proposed on N. White Street. Please reference the Future Pedestrian Network Map in the Comprehensive Transportation Plan.
	So many streets/roads in Wake Forest need repaving please.	Added action item 13-13.
	Sidewalks to cross Capital Blvd. at Stadium/Jenkins needed.	No revision. Multi-use paths are proposed on Jenkins Road/Stadium Drive. Please reference the Future Pedestrian Network Map in the Comprehensive Transportation Plan.
	Sidewalk needed on a portion of Rogers Rd. Also needed on Rogers Branch Rd. where the apartments are being built.	No revision. Multi-use paths are proposed on Rogers Road. Please reference the Future Pedestrian Network Map in the Comprehensive Transportation Plan. Sidewalk is being installed along Meridian at Roger Branch's property frontage with their development.
	Open space please. Rt. 95 and other roads can't handle current development.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Please stop all the apartments- At 98 and Heritage Lake the complex is so huge and will make all the roads too congested.	No revision. The Plan identifies that there is a strong need to increasing housing choices and attainability for all income groups, stages of life, and backgrounds.
	Continue to ensure beautification and landscape plans that keep Wake Forest lush and pretty. It is a hallmark "forest". More replanting needed.	Green space goal revised.
	Interconnect greenways to get to Joyner Park.	No revision. Please reference the Future Pedestrian and Greenway Network Maps in the Comprehensive Transportation Plan.
	J. Rosenwald School for Colored Children (DuBois) - music arts center and black history taught	No revision. Reference Northeast Area Plan.
	UDO concern - projects are broken into smaller projects to avoid the oversight they would have. This will result in less transparent decision making at lower levels in organization.	No revision since ordinance related comment. Comment provided to UDO project manager.
	The infrastructure should support the population. Roads, sidewalks, bike paths, etc. should be planned and improved before housing and businesses are approved. Traffic in Wake Forest between 3p-6p is very heavy and most roads cannot support it.	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
	Make more of an effort to keep some of the existing trees on a new development. Clear cutting is an eyesore for 10+ years until newly planted catch up. Keeping a few remaining original trees here and there that are saved is a great idea.	No revision. Action item 22-6 (formerly 18-6) included.
	Make parks and greenways #1 priority.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
16-3	Chapel Hill has a phone app that will tell you how many minutes till next bus arrives at your stop.	No revision. GoRaleigh's website has a function for live real-time bus tracking.
	Please add another color coding to the existing land use map. The new color would designate undeveloped land that has SUP/PUD limitations. i.e. the preexisting Wake Forest golf course.	No revision. The Community Plan is a guiding document and is not proposing to amend any zoning entitlements.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
78	Green space preservation: Needs more- "explore incentives" should be "create incentives now".	No revision. This action items are listed as short-term and the incentive evaluations are anticipated to occur with the UDO update process.
	Need more light industrial outside town.	No revision. Industrial land use designation is proposed in One World Way/Unicon Dr. vicinity.
	There should be a land preservation tax imposed on all sales and used by the county to buy or pay for land easements; keep Wake Forest green.	No revision. Town is authorized by the statutes to collect a recreation fee.
	Will aging infrastructure be updated by the Town? Utility lines.	No revision. Action item 13-1 recommends expanding Town's facilities and services concurrently with new growth. Town of Wake Forest is a merger community with the City of Raleigh. Raleigh inspects the utility infrastructure and is responsible for capital utility projects.
	Make sure new developments are consistent with existing adjacent property.	No revision. Action items in Residential Character relate to compatibility in setbacks for infill, design standards for multifamily, etc.
10-8	High intensity uses next to residential is being supported in old WFCC area- poor entry to town from west & north.	No revision. The Community Plan is a guiding document and is not proposing to amend any zoning entitlements.
	Update the replacement requirements to require native canopy trees (i.e. oaks) not just bush/trees.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Wake Forest needs to come up with a plan to control littering. There's more and more every day and it will only increase with more people. Start with fines.	No revision. Town has programs, such as the "Show WF Some Love" campaign.
	Re-evaluate open space to consider pastures on Forestville Rd.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
8-8	What will be done about water pollution caused by runoff?	No revision since ordinance related comment. Comment provided to UDO project manager.
	Will low-income residents be protected from rent increases/predatory house buying? Community character.	No revision. Affordable Housing Plan is being developed. Comment forwarded to Plan's project manager.
10-4	New development in northwest is changing community character in a gateway section- money talks.	No revision. The Community Plan is a guiding document and is not proposing to amend any zoning entitlements.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
10-1	Planning is not considering the large increase in commuters from outside WF- road implications.	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
	Golf course should only be partially developable with concentration on environmental conditions and water management.	Residential Area Plan description revised.
	Opposed to future multifamily housing because of road traffic increase, schools overcrowding, strain on utilities, and clear cutting of land will increase water runoff and water quality. General Residential 3 & 5 are much more sustainable for a town the size of Wake Forest.	No revision. The Plan identifies that there is a strong need to increasing housing choices and attainability for all income groups, stages of life, and backgrounds. Action item 13-1 specifies that the Town's municipal facilities and services should concurrently expand with new growth.
	It is assumptive to turn the Joyner property into mixed residential. Is there a way to keep none of this area natural? Conservation development or another park. This is a one time opportunity, then the land is gone.	Map revised to Conventional Residential.
	Include private open space in open space designation.	No revision. Private, HOA owned open space parcels are not being included in the open space land use designation.
	I see no reason to downgrade traditional single family land use areas to mixed residential.	No revision. The Plan identifies that there is a strong need to increasing housing choices and attainability for all income groups, stages of life, and backgrounds.
	UDO requiring true conservation subdivisions in watershed.	Added action item to add cluster developments to UDO. Added section on conservation design/cluster development.
	Please link more homes with wider roads and stoplights. Developers should pay impact fees for roads.	Paragraph on page 35 added. Town does not have authority to charge transportation impact fees.
	The transit oriented development is inconsistent with the future transit supportive residential plan.	No revision. Mixed Use Development and specific residential housing options are permitted as supporting uses in Transit-Oriented Development.
	Residential development along Forestville Road should not include high density based on traffic/schools, etc. in area.	No revision. The Comprehensive Transportation Plan (CTP) identifies ultimate roadway cross sections. As development occurs, roadway improvements will occur.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Need to lobby general assembly for legislative changes like traffic studies that really capture the overall impact-public facilities initiative.	No revision. Action item 22-6 (formerly 18-6) included.
	Affordable housing is a challenge but needed, so press on.	No revision. Comment forwarded to Affordable Housing Plan project manager.
	Building around Wake Forest needs to be thought about more. Think about the impact it has on the environment, traffic, water, schools. Just a suggestion.	No revision. Additional considerations and action items encompass topics related to environment, traffic, services, etc.
2-1	I was glad to see affordable housing included in the plan and encourage the Town Commissioners to adopt a robust plan so that all that work in the Town have access to safe quality homes.	No revision. Comment forwarded to Affordable Housing Plan project manager.
1-1	Alignment should be only with support of local residents.	No revision. UDO update process will be a legislative process consisting of public input.
2-1	Please consider the very recent rezoning work implemented just a few months ago re: 306 South Allen. Please revise the proposed land use from transit supportive to conventional residential to reflect the wishes of the Board of Commissioners, businesses, and residents. The Board unanimously agreed that apartments/multi-family should not be allowed there. We would appreciate if the land use designation support that position.	Map revised to Mixed Residential. In description of Mixed Residential and Transit Supportive Residential, professional services is listed as a supporting use. Residential Area plan specifies to restrict multifamily development on the site.
	Make proposed developments match or be consistent with adjacent or existing property.	No revision. Action items in Residential Character relate to compatibility in setbacks for infill, design standards for multifamily, etc.
3-3	Removing barriers can overburden traffic and drive more commercial development-suburban sprawl not in Wake Forest.	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
	How will we supply adequate water to all these high density housing units in the future?	No revision. Town of Wake Forest and City of Raleigh have an approved merger agreement, which includes water and sewer allocation for areas included in Community Plan boundary.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	There are limited opportunities for parks and open spaces. Once developed those opportunities are gone. Wake Forest needs to stay green. Keep the forest in Wake Forest.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
1-1	Should be fix the infrastructure before any more building occurs.	No revision. If development proposals complies with Comprehensive Transportation Plan, Unified Development Ordinance, and Traffic Impact Analysis recommendations, staff has no legal authority to deny application.
2-1	Yes to affordable housing! Wake Forest should be affordable to all.	No revision. Comment forwarded to Affordable Housing Plan project manager.
5-6	How will transit services be incorporated and expanded?	Added action item to investigate long term transit options such as microtransit.
5-7	How will accessibility for wheel chairs users and limited mobility folks work?	Text revised. Action item 13-4 updated to reference Public Rights of Way Accessibility Guidelines (PROWAG).
	Wake Forest golf course is open space or a golf course. Keep it that way, do not change the PUD.	No revision. The Community Plan is a guiding document and is not proposing to amend any zoning entitlements.
	What is the plan to manage the additional traffic on Hwy 98 from all of the development being built off of the highway?	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
	Pump the brakes on the development until traffic issues are addressed. Folks from the other areas in the triangle talk badly about the traffic in Wake Forest.	No revision. If development proposals complies with Comprehensive Transportation Plan, Unified Development Ordinance, and Traffic Impact Analysis recommendations, staff has no legal authority to deny application.
	Very concerned about the watershed's viability with all these plans. How many spots will flood easily- in a drought there may not be enough water with so many demands?	Action item 23-13 added.
	Wildlife protection/consideration. Conservation easements for habitat (on vacant land).	Revised Green Space Preservation section to mention wildlife habitat.
	Maintain area around reservoir as public park for hiking/biking.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
	Please do not cut down trees around the reservoir. Keep that area as nature/hiking...do not develop.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	I live in Del Webb. Four story apts approved to be built corner of Royal Mill and Gilcrest. Assisted living to be built next to Del Webb. Three acres remain open unknown behind Calista Drive. We're disappointed with four story apartments being built. What will be built on 3 acres?	No revision. The parcel located west of Mendocino St. extension and the proposed nursing home is zoned RMX.
17-3	Wake Forest has an opportunity to grow green space on Joyner property. Make it a park, please.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
	Please connect all the bike trails and pave around to reservoir.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
	Too much traffic everywhere.	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
	UDO requiring conservation subdivision in watershed.	Added action item to add cluster developments to UDO. Added section on conservation design/cluster development.
	As Wake Forest grows, tree canopy should grow.	Action item 22-7 added.
	Need to fix Rogers Road- too narrow and congested.	No revision. P-5707 is a proposed grade separated roadway project on Rogers Road over the railroad.
	Someone needs to check the trees at Del Webb @ Traditions. I don't believe they are native to the area, none have done well on Calista Drive.	No revision. Provided comment to Urban Forestry Coordinator to investigate public street trees.
	Keep Wake Forest reservoir a park like setting with safe walking trails for families.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
	Look at keeping trees as a form of SCM. Thicker buffers between neighborhoods.	No revision since ordinance related comment. Comment provided to UDO project manager.
	More condos and townhomes in the downtown area to create a planned urban setting.	No revision. Community Plan discusses Downtown area to provide additional guidance until Renaissance Plan is updated.
	Retain Wake Forest's identity. Pave White Street.	Added action item 13-13.
	We need more: open space, less dense development, bigger setbacks. Some of the ongoing development is ruining Wake Forest. Don't let us be another Cary.	Green space goal revised. Comment related to setbacks provided to UDO project manager.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
10-5	Require developers to beautify neighborhoods now. No need to continue evaluating.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Pave Heritage Lake Rd. Way past due.	Added action item 13-13. Town will continue to coordinate with NCDOT on state roadways.
11-3	11-3 is a must. If Wake Forest is going to grow there needs to have fiber and more broadband available. Needs to be a short term item.	Added action item 11-4.
	Business and restaurant areas with a fountain or water feature. Brings people and promotes a relaxing environment.	No revision. Action item 10-2 included.
	Control weeds and overgrowth along sidewalks-especially near Smith Creek soccer and Heritage High School.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
5-1	"Incentivize" means a town give away of \$\$\$\$. Opposed to 5-1.	No revision. All incentives, including nonmonetary, will be evaluated.
	Better playgrounds.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
	Improve Main St. to a quality equal to Heritage and Wakefield.	No revision. Provided comment to Engineering Department.
	Recent minimal setbacks do not allow for any aesthetic. Slow down high density construction.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Pave around the reservoir and connect all the greenways.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
	Forestscape. Streetscape is not appropriate everywhere. Require transitional setbacks and landscape buffers.	No revision since ordinance related comment. Comment provided to UDO project manager.
7-1	Setbacks need to be larger in Neighborhood Commercial.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Setbacks with desirable landscaping a la Heritage are required.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Do not allow Fee in Lieu for trees.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Incentivize maintaining original wooded areas. Not assess, do put in UDO.	No revision. Action items included in Green Space Preservation and Tree Canopy.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Include private open space in open space designation.	No revision. Private, HOA owned open space parcels are not being included in the open space land use designation.
	UDO concerns: Too focused on urbanizing the Wake Forest landscape. We need to move back towards encouraging trees, not concrete.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Would be nice if Downtown did not turn into high rises and look like a big city.	No revision. Community Plan discusses Downtown area to provide additional guidance until Renaissance Plan is updated.
19-8	No solar farms. Poor land use.	No revision since ordinance related comment. Comment provided to UDO project manager.
19-1	Do not approve building if not green. Do not incentivize.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Provide more shopping and boutique stores and reasons for people to frequent town. The events are great. It's day to day vibrancy that needs to improve.	No revision.
	Please stop the urban minimal setbacks. Update UDO to allow larger setbacks with tree lined blvds and keep concrete buildings further from the roads.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Accidents Fatal to Happen. Chalk Rd needs to be studied at Mews at Legacy and Heritage. It is difficult to come out when you can't see around curve. Also, Franklin Academy People picking up children are blocking access and lining up their cars on Chalk Road and you cannot see either way to come out.	No revision. Provided comment to Engineering Department.
	In the area east of Mackie Park to 96, just north of 98, existing build out is residential with larger lots, horse farms, etc. It doesn't make sense to make this mixed use, it should just be single family residential.	No revision. Single-family detached residential is a primary use permitted in the Mixed Residential land use designation.
	Not just conventional design. Encourage conservation design on large tracts with sensitive natural features.	Added action item to add cluster developments to UDO. Added section on conservation design/cluster development.
	At least 949 mountain bikers represent/use this area.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	You've already built too much in too condensed a space and decimated all the trees. Stop.	No revision. Action item 22-6 (formerly 18-6) included.
	Is there a requirement to keep a percentage of forest before building? If not, you need to require they keep trees.	No revision. Action item 22-6 (formerly 18-6) included.
	Please slow the building. We are losing the forest in Wake Forest. So very sad.	No revision. Action item 22-6 (formerly 18-6) included.
	Walking connectivity. Start by looking at Retail Drive, where there are bus stops and sidewalks and it's not safe to cross the street. Traffic more people+more cars on the road.	No revision. Action items 17-1 through 17-7 (formerly 15-1 through 15-7) address sidewalks and multi-use paths.
	Build more parks and save the trees.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
	Sight line and noise concern for proposed "S" line.	No revision. These evaluations will occur during the S-line planning and design.
	Keep the forest in Wake Forest. Don't building more housing developments without roads to support.	No revision. Action item 22-6 (formerly 18-6) included.
	Downtown multi-use development needs to have food stores and restaurants within walking distance of the townhomes and apartments. Also doctors offices/Rx in the area	No revision. Community Plan discusses Downtown area to provide additional guidance until Renaissance Plan is updated.
	Important decisions for planning the Town of Wake Forest need to be made by local elders who know what has worked for the town- and what they want to see. Long time residents.	No revision. Draft Community Plan is based on a significant community input process to provide a balanced approach.
	This seems to contradict itself. How can prioritizing infill development ensure the infrastructure is there?	Growth Areas text removed.
18-6	Tree preservation is essential	Green space goal revised.
	Consider: Taxpayers are willing to get behind purchasing land for parks.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
18-3, 18-6	Tree preservation is essential. 18-6 is important, 18-3 will require work up front with developers.	Green space goal revised.
18-3, 18-6	Stop developers from stripping all the trees for their convenience to keep "lush tree canopy" goal.	No revision. Action item 22-6 (formerly 18-6) included.
17-3	Need more conservation areas.	Green space goal revised.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
17-4	Increase more green space.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
17-1	Building townhouses and apartments away from downtown will force more commercial corridor services and traffic.	No revision. The Plan identifies that there is a strong need to increasing housing choices and attainability for all income groups, stages of life, and backgrounds.
16-3	Will transit maps be more widely available?	No revision. Action item 14-1 (formerly 16-1) addresses frequency in service and network expansions.
17-2, 17-3	Maintain the area around the Wake Forest reservoir as green space or develop hiking/biking trails. Avoid runoff into the lake.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
17-1 to 17-4	Yes. Preserve green space.	Green space goal revised.
17-3	Must be changed to "short term" or green space options will disappear e.g. old Wake Forest golf course.	No revision. Action item 17-3 is listed as ongoing.
17-4	Please keep open space as open space. Also please provide detail on how the only non Wake Forest park , land use open space is a P1 housing vs a park or nature park for Wake Forest.	No revision.
16-1 to 16-3	What is goals for S-line railway? Will stops be put in to alleviate traffic? What about a connection to Raleigh?	No revision. Please contact the Planning Department for additional information about the S-line.
	Limit the span and/or height of retaining walls for homes and townhomes adjacent to preserved green space.	Added action item to explore UDO update to reduce visual impact of retaining walls.
15-1 to 15-7	Will more be done about WF accessibility for wheel chair users and folks with mobility issues?	Text revised. Action item 13-4 updated to reference Public Rights of Way Accessibility Guidelines (PROWAG).
	No town property deemed park in NW.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
	Double town funding for greenways and sidewalks.	No revision. Provided comment to Finance and Administration.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
17-2	Why is this short term? Should be ongoing.	No revision. Following the Community Plan process, the Unified Development Ordinance (UDO) will be updated and conservation subdivision will be established as an option in the UDO.
17-3, 17-4	Old Wake Forest golf course is already declared open space/ golf course by PUD. Do not entertain development. Owner knew it could not be developed. He will sell to town if he can't develop. 185 acres open space.	No revision. The Community Plan is a guiding document and is not proposing to amend any zoning entitlements.
14-3	Traffic circles can be very useful at some Wake Forest intersections.	No revision.
	New district park needed south and east of town. Partner with Wake County and Rolesville.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
	Prioritize expansion and connection of greenways.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
10-2, 10-3	NC state law allows clear cutting. Create incentives now to keep old growth trees.	No revision. Action item 22-6 (formerly 18-6) included.
18-3, 18-5, 18-6	All good short term action plans. Rezoning land use from multi level townhomes to R-3 and R-5 would help to preserve the tree canopy.	No revision. The Community Plan is a guiding document and is not proposing to amend any zoning entitlements.
15-1	Great to see proposed greenways west of Main St. on pg 74. It would be great to see connections or additional connections with those in the east.	No revision. Please reference the Future Pedestrian and Greenway Network Maps in the Comprehensive Transportation Plan.
	Preserve Horse Creek and watershed around it.	Action item 23-13 added.
	Suggest a cluster of conservation development in the UDO.	Added action item to add cluster developments to UDO. Added section on conservation design/cluster development.
	Keep the PUD protected, do not build into ponds and watersheds.	No revision. The Community Plan is a guiding document and is not proposing to amend any zoning entitlements.
15-6	Will traffic be cut down along side of it?	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
17-2 to 17-4	Maintain totally natural areas for hiking and mountain biking. Soft trails. If paved trails are added, also add MTB loop at reservoir.	No revision. The Comprehensive Transportation Plan (CTP) provides an action item to "evaluate the use of soft trails and paved surfaces in the development of the Wake Forest Reservoir master plan while ensuring residents with varying ability level access to the reservoir."
	Need green space/open space on west side of Capital Blvd. including greenways.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
	Regarding green spaces. Ensure they connect to ensure maximum potential.	No revision since ordinance related comment. Comment provided to UDO project manager.
17-2	Don't allow mass grading for residential development of properties with numerous 3' to 6' diameter trees like they were allowed to do in Holding Village. Preserve some of the natural character.	No revision. Action item 22-6 (formerly 18-6) included.
18-3	Promote tree preservation, higher fees for private developers.	No revision. Action item 22-6 (formerly 18-6) included.
18-1	Are there any plans to incorporate carbon absorbing forestry?	No revision since ordinance related comment. Comment provided to UDO project manager.
15-6	Pedestrian friendly bridges crossing major roadways?	No revision. Provided comment to Transportation Planner.
	Trees for the Triangle will plant spaces with native trees. Awesome organization. Help beautify Wake Forest.	No revision.
	Require dispersed stormwater retention multiple devices (including LID) and do not rely on one BMP that may fail.	No revision since ordinance related comment. Comment provided to UDO project manager.
	Objective of our planning to preserve our environments and wildlife-reduce impact of environment islands.	Revised Green Space Preservation section to mention wildlife habitat.
19	Sustainable, excellent work.	No revision.
	Use permeable pavement to manage stormwater.	No revision. Action item 8-8 addresses permeable pavement.
19-1	Will the public be able to access/know which companies are being used for green development?	No revision. If company information is provided on plan applications and building permit applications, information may be accessed online.
	Develop more townhomes downtown to support the downtown small businesses.	No revision. Community Plan discusses Downtown area to provide additional guidance until Renaissance Plan is updated.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
20-1	What will be done to offset greenhouse emission from tourism?	No revision. Sections included on Sustainable Development, Sidewalks & Multi-use Paths, Public Transit, etc.
	What is going to happen to the too small and too packed roads? Are we going to widen the roads?	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
22-6	People leave downtown Wake Forest and go elsewhere when they can't find a place to park.	No revision. Action item 26-6 (formerly 22-6) addresses downtown parking.
22-6	Why an attention to mass parking? Why not push for more accessible public transit?	No revision. Action items 14-1 through 14-5 (formerly 16-1 through 16-3) addresses public transit.
	Create conservation subdivision.	Added action item to add cluster developments to UDO. Added section on conservation design/cluster development.
	Stop building.	No revision. The Community Plan provides a guide for how growth should occur in order to balance the needs of the entire community while preserving its small-town charm.
	Are there going to be more industrial zones in Wake Forest and Youngsville?	No revision. Industrial land use designation is proposed in One World Way/Unicon Dr. vicinity.
	Where is the "lush tree canopy" located?	Action item 22-7 added.
	Keep this open space to provide natural habitat.	No revision. Property is privately owned.
	Why is this being done again at Renaissance?	No revision. Community Plan discusses Downtown area to provide additional guidance until Renaissance Plan is updated.
	Will there be new park coming to Wake Forest?	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
	Office Uses & Police Station.	Map revised to Office, Civic & Institutional.
	Image with text. I wish I could go hug that tree but the wall is too big.	Added action item to explore UDO update to reduce visual impact of retaining walls.
	This second sentence to key to whole process.	No revision.
	Office space & police substation. Why not office/institutional?	Map revised to Office, Civic & Institutional.
	Currently zoned open space. Fix.	Map revised to Conventional Residential.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
	Please get forest in Wake Forest. More park space, better/larger setbacks and smaller dense development.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan. Comment related to setbacks provided to UDO project manager.
	Redeveloped/Vacant? This a "multi-family" high rise development.	No revision. Project had not received Certificate of Occupancy as of the map creation date.
	Police shooting range is noisy for adjacent residents	No revision. Provided comment to Police Department.
	How will US-1 conversion be coordinated with existing businesses?	No revision. Staff will continue to coordinate with NCDOT on U-5307.
70	Community facilities need to be planned with existing businesses	No revision. Action item 13-1 recommends expanding Town's facilities and services concurrently with new growth.
51	About 12 acres of vacant land near Del Webb at Royall Mill and Gilchrest – unknown what is going there. Adjacent resident does not want four-story complexes.	No revision. The parcel located west of Mendocino St. extension and the proposed nursing home is zoned RMX.
75	Need places to park cars at bus stations – park and ride. Not everyone can walk to transit	No revision since ordinance related comment. Comment provided to UDO project manager.
	Address how to ensure new development respects open space	Action items added to Green Space Preservation and Tree Canopy.
	Promote cluster development to preserve open space.	Added action item to add cluster developments to UDO. Added section on conservation design/cluster development.
	Figure out strategies to mitigate clear cutting.	No revision. Action item 22-6 (formerly 18-6) included.
	Protect wildlife areas and natural area.	Revised Green Space Preservation section to mention wildlife habitat.
	Lower densities, greater open space, greater setbacks.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan. Comment related to setbacks provided to UDO project manager.
	Add information about Conservation Design - Add examples of conservation design to Additional Considerations.	Added action item to add cluster developments to UDO. Added section on conservation design/cluster development.
	Would like a dress shop, perhaps in Downtown.	No revision.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
85	Fill vacancies in Downtown.	No revision. Action item 26-3 (formerly 22-3) recommends identifying strategies to fill vacant buildings Downtown.
	Desire for Trader Joe's.	No revision.
	Desire for more park acquisitions by the Town to actively expand open space.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
50	Add to Residential Area #8: ensure roadway capacity is improved with growth with major residential development proposed	Text revised.
57	Upgrade the Renaissance Center to be a more permanent facility (Liked the idea of the Mixed Use block).	Revised language to "If the owners were to choose to develop, below are alternatives to consider:".
70	Add recommendation for updating Parks and Recreation Plan for new playground facilities.	Added action item to update Parks, Recreation, and Cultural Resources Master Plan.
	Add explanation of why growth is necessary in the Town.	Provided clarification on page 33.
62	Add recommendation for grants/financial support for upgrading historic homes in Historic Districts.	No revision. Key recommendation in Historic Preservation section already notes promotion of State and Federal Tax Incentives.
	Reduce height of retention walls to allow for access to open space, even if it means a larger area is needed for the pond. Acts as a barrier to residents and other natural features.	Added a key recommendation in Community Character.
	Diversify stormwater management systems so if one fails all do not.	No revision since ordinance related comment. Comment provided to UDO project manager.
34	Support infrastructure before growth	Text revised on page 35.
34	Coordinate with private developers on traffic impact.	Text revised on page 35.
	Address traffic congestion, particularly along Rogers Road by the High School.	No revision. P-5707 is a proposed grade separated roadway project on Rogers Road over the railroad.
70	Add recommendation to plan for soft trails for mountain biking.	No revision. Provided comment to Parks, Recreation & Cultural Resources Department.
47	Club Villas Drive/US 1 - There are townhomes there now - should this be Corridor Commercial?	No revision. Area along US-1 and proposed service road identified as Corridor Commercial on land use map. A land use map does not create nonconformities.

February 1, 2022 Open House
Comments on January 11, 2022 Draft

Page	Comment	Response
33	Planning Jurisdiction Map + Annexation Agreements - Are there agreements to the Northwest? Should we expand to the Northwest?	No revision. Town of Wake Forest and City of Raleigh have an approved merger agreement, which includes water and sewer allocation for areas included in Community Plan boundary.
33	Sustainable Growth—Title says Sustainable Growth - Are the annexation boundaries misleading? They look like growth areas.	Revised formatting.
70	Prioritize parks in the NW. Add as a goal.	An action item to update the Parks, Recreation, and Cultural Resources Master Plan has been added to the action matrix. When the Parks, Recreation, and Cultural Resources Master Plan is updated, a needs assessment will be conducted that will determine where additional park amenities, if any, are needed throughout Town.
3	Unclear how the Land Use Plan connects to other documents.	No revision. References provided on pages 22-23.
	Interested in knowing whether there is an over-arching Plan for the road infrastructure to accommodate the projected population increase over the next decade and beyond.	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
	Is it going to be hard to breathe with masks and there are like no trees?	No revision. Action item 22-6 (formerly 18-6) included.

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
86	Two recommendations for the action plan: 1. Under section 5, commercial development, I would like to see a short-term plan that requires developers to leave more open space and prevent them from clear cutting land. In the 7 years I have lived here the tree canopy has been decimated. Planting a handful of 6 foot trees...half of which may die and not be replaced...is just not enough. 2. Section 20-4, Tourism: I travel globally and almost every town trying to attract tourists has one or more sets of strategically located public restrooms. I would add this to the plan.	No revision. Action item 22-6 (formerly 18-6) included. Provided comment about bathrooms to Parks, Recreation & Cultural Resources Department.
	I can tell that a great deal of effort and thought has been put into this plan. My biggest concern, with all new planned home developments, is the devastation to the wildlife as well as our canopy. Even developing greenways and parks disrupts the homes of our local wildlife. I live in Wall Ridge and the natural, untouched areas for wildlife continues to be destroyed and minimized by development. I think that taking into account the constant reduction and destruction of these areas with further development in the same area needs to be addressed. Animals adapt and can survive to some extent in smaller areas, but if we keep shrinking them to non-existence, where is the wildlife supposed to go? I am sure I'm not the only person who moved to Wake Forest for the untouched areas, quaint small town feel, etc. This draw is becoming non existent as we move forward to a more populace and crowded city. The traffic into and out of Wake Forest, any area, is as bad as being in downtown Raleigh. The perks that made Wake Forest so desirable for my young family and those families looking to move here are swiftly disappearing.	Revised Green Space Preservation section to mention wildlife habitat.

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	Our first thought in reading through the plan is why does beautiful Wake Forest have to turn into another Raleigh or Cary? We moved to Wake Forest from Raleigh to get away from the massive congestion of housing and roads to what we thought would stay a beautiful area to reside in. Would like to know bottom line what Wake Forest is trying to accomplish with all the growth plans: 1) maintain the "historic, small town charm" or 2) grow and develop to the point of massive congestion of housing and traffic. Please clarify the "historic, small town charm" - does this apply to only the downtown and closely surrounding area? Number 1 priority in all of the planning must be the current and future road congestion due to excess growth (residential). If we do not fix this situation now as the first item on all lists, Wake Forest cannot accommodate all the high density housing currently in process and future. Please give the residents an easy to read detailed plan for the Wake Forest roads. A example of the development/congestion is the Rogers Road and Forestville Road areas behind Harris Teeter. This high density residential apartment buildings, town homes, and houses is not what we envisioned for our Wake Forest area. And, they want to connect a road within this entire development that will go through Heritage and cause road congestion within our development and homes. Where is our quality of life going. In reference to details in the Action Plan, Item 10-10 Community Character reads "work with DOT to identify areas for roadway enhancements (i.e.)	

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	more frequent grass cutting and landscaping." Please don't put the focus on beautifying until the roads can accommodate the added traffic! Action Plan, Street Connectivity 14-1 through 14-3: there is no answer to future road congestion nor does it address existing traffic congestion. Traffic circles are not the answer. In summary, what locality is Wake Forest looking to mirror WF after? Is it the Raleigh plan or Cary or otherwise? We respectfully ask that another long look is taken at these congested areas and come up with a unique, charming small town answer to adding more residential areas when they are needed. Not now. We believe there is a lot of undeveloped land within WF that could thoughtfully be used. Everything does not have to be on top of one another.	No revision. The Community Plan provides a guide for how growth should occur in order to balance the needs of the entire community while preserving its small-town charm. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	My takeaway from reading this plan is that it is all about the addition of housing developments. I do not see any plans to preserve or provide natural areas for the town's communities to enjoy. Isn't this town called Wake Forest? Although people make comments that the town should change its name due to the continuous development of subdivisions, it is not a joke. The town is missing a huge opportunity, as far as I am concerned, to differentiate itself from every other town in Wake County. With every development, comes the loss of habitat which was the reason I chose to move here. Isn't preserving natural space or creating new open space important to the town that has "forest" in its name and refers to itself as "Tree City"? From what I see in the development plan, the town is only interested in the business of adding more homes, as if it is a real estate holding company. Another huge concern is where is all the water coming from for the future development of these subdivisions? The town's growth to date has been explosive in the past 30 years. Ok, that is to be expected, but is this the rate we need to continue at? In 10 years, the ability to drive from one side of town has changed dramatically and I cannot imagine how adding all the proposed homesites will affect the character, what's left of the open space, and the "forest-ness" here in the years ahead. Stop and take a good look at what is proposed. This pace is not sustainable in my opinion.... for what it's worth.	No revision. Action items for Green Space Preservation and Tree Canopy included.
	I'm also curious how a smoke and vape shop was allowed to set up shop directly across the street from Heritage High School? Aren't there zoning laws restricting these type of businesses in relation to schools? If not, there should be!	No revision. Provided comment to UDO project manager.

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	I noticed there are a lot of spaces slated for apartments/condo type housing, despite a seemingly strong community opposition to such buildings. I live close to the Harris Teeter on Rogers Rd and am already dreading the additional traffic once those unsightly buildings are completed. How can the city justify squeezing all these additional residents into such a tight spot without addressing traffic flow?	No revision. The Plan identifies that there is a strong need to increasing housing choices and attainability for all income groups, stages of life, and backgrounds.
	All growth must stop! We need a moratorium on all construction. Stop destroying the reasons we moved here just two years ago! All of the forest on Wake Forest is being destroyed at a head-spinnin rate. Let's just wait and see how the needs develop and revisit in ten years. No new construction no matter what except as required for roads and policing or for the fire department.	No revision. North Carolina General Statutues limit the authority of municipalities to establish a temporary moratorium particularly governing residential uses.

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	We are under contract for the property at (PINs 1831537516, 1831644698, 1831646036, 1831751080) known as the Wake Union Development, roughly 65 acres. We envision our development as a pedestrian mixed-use community with new residential capacity - apartments and townhomes. The legalese is below, and we welcome the time and discussion to walk through our proposal given this property has been vacant for 20+ years - feel free to call or email - 704-905-0215, swhitworth@marettllc.com(External link). Thank you for taking the time to read, review and respond. Steven This property is currently under review for rezoning from HB to NMX and RMX. The Future Land Use in the draft community plan shows the property as Corridor Commercial. This is in line with the current HB zoning, but would not accommodate the mixed use center currently envisioned on the property. While a portion of this property will accommodate the Commercial land use currently proposed, the northern and southern ends of the property would be better suited as multi-family and townhome developments. Marett LLC has had many conversations with the neighbors and town staff in regards to this property, and we believe that the rezoning proposal of multi-family and townhomes along with the mixed used master plan design is more in line with the character of the area, and what is desired by the members of the community. Marett LLC is requesting that the Future Land Use classification be more suited to accommodate for the proposed rezoning with townhomes and multi-family as the current proposed master plan has shown.	No revise. This area is located in an activity center and the land use for activity centers would allow mixed use buildings and supporting residential uses.
	No to strategic growth or growth of any kind. We need a moratorium on all growth for the next ten years.	No revision. North Carolina General Statutes limit the authority of municipalities to establish a temporary moratorium particularly governing residential uses.

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	There is no more tree Canopy. It is all destroyed in just the last 2 years. Stop the destruction or WF will be just another ugly suburban disaster. Remove "strategic growth" immediately from the goals. All of my neighbor friends agree.	Growth Strategies Map removed.
	Thank you for a well thought-out and insightful Draft Community Plan. My concerns deal with the current large development in progress and the committed development on the books. How will this impact our current in place infrastructure? Will we be able to keep pace with the demand? One of the goals mentioned in the plan is to "Enhance & Maintain Wake Forest's Green Spaces". I am all for this but no mention was made of the identity of potential large land tracts that may be acquired by the Town for land conservation and preservation . These parcels should be part of the master plan. Question 2 deals with future land use and doe a wonderful job in its presentation. However there is no mention of potential farms and forest for conservation and preservation. Question 3 I believe deals with the identity of Wake Forest. It is my belief that Wake Forest is known for its down town, its historical treasure and its small town feel. This is the character and charm of our community. It is important that energies be directed to the maintenance, repair, and improvement of Wake Down Town. Perhaps this can be accomplished in part through commercial and private partnership. I look forward to listening and learning on Tuesday	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	Appreciate the thoughtfulness put into this draft community plan as it's clear the town is trying to address community concerns around infrastructure. I appreciate more emphasis on pedestrian/bike friendly access to existing areas. As development along 98 continues, I don't see where town is addressing in community plan improving pedestrian/bike friendly crossing from South to North across 98 - such as S. Main Street across 98 or the new Grove 98 areas as well as other areas along 98 to provide easy pedestrian/bike friendly crossing from residential to commercial areas.	No revision. Please reference the Future Pedestrian and Greenway Network Maps in the Comprehensive Transportation Plan.
	Regarding Question #3: Interesting that E. Spring area and S. Allen Rd area seem to be left out of Residential and Commercial plans other than mention of Senior Housing in S. Allen area. Is there opportunity to provide amenities in these locations/link these areas better to downtown?	No revision. Please reference the Northeast Area Plan.
	The draft Community Plan is well thought out and well written. Mungo Homes has a 10 acre piece of property under contract to develop on Shearon Farms Ave (PIN 1738472008). Currently the property is outside of Town limits but in the Towns planning area. The Future Land Use in the draft community plan calls for the property to be Transit Supportive Residential which encourages high density multi-family apartments or condos. Due to the proximity of the adjacent Single-Family homes to the east it is our opinion that townhomes would be a smoother transition to the adjoining commercial property to the west. Mungo Homes is requesting that the Future Land Use classification be more suited for townhomes as the primary use.	Revised to Mixed Residential.

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	Clearly, we need to preserve our Canopy and open spaces. It is unsettling to see the town seem to default to supporting dense development at every turn. Here is one concept that can help preserve our open spaces conserve our watersheds and still allow development. https://www.ncufc.org/uploads/Conservation_subdivision.pdf(External link) There is no "need" to look like New Jersey or Manhattan. Some people have referred to Cary and I agree. Drive through Cary and see the multiplicity of Townhouse and apartment buildings. It is NOT attractive. This town can live fine and maintain a high quality of life by NOT growing for the next 10 years. Business should be welcomed in the primary transit corridors. We need business. We just don't need excessive high density housing.	Added action item to add cluster developments to UDO. Added section on conservation design/cluster development.
	Less forest, too many people and too much traffic is making Wake Forest an undesirable place to live. Bad planning causes massive traffic backups on main street, a disaster. Does not have the infrastructure. Will there be enough water for such a large population during a drought. Why is massive growth so important (profitable) and to who? Very Disheartened	No revision. Town of Wake Forest and City of Raleigh have an approved merger agreement, which includes water and sewer allocation for areas included in Community Plan boundary.
	WF needs a moratorium on most growth and development! An example is multi-family housing like apartment complexes. We have so many already,	

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	with several being built right now. The infrastructure just isn't there. I know the infrastructure won't completely "catch-up", but it's barely even in this century. Transit-supportive residential and urban zoning are not appropriate for WF. People don't mover here for that; if they want that, they can live in Raleigh or Cary. There's a reason that WF residents are now moving out to Youngsville and other smaller towns. Need to have more creative ideas for traffic control. For instance, the area on Roger's Road where Culver's, etc. is located is a death trap. But kudos for improving the section of Forestville Road between Harris Teeter and Publix. Limit clear-cutting! If Heritage could do it, so can other developments. We need more control over what is allowed. Town commissioners and the planning board need to have the power to say no. WF is a high-demand area for developers - why are we letting them do whatever they want? We can be more picky! We can require more trees, more green space and parks, more small playgrounds and dog parks. My understanding is that there is currently a maximum 20 foot buffer from the street to where new development begins. That should be a minimum of 20 feet. 20 feet doesn't allow for the preservation of some existing, mature trees. Planting new trees is nice, but it's not the same as preserving the tree canopy we already have. I agree that we should cultivate and grow the cultural and arts community in WF.	No revision. North Carolina General Statutes limit the authority of municipalities to establish a temporary moratorium particularly governing residential uses. Provided comment related to buffers to UDO project manager.

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	Wake Forest is FULL! this area does not have the infrastructure to keep building massive condo's or apartment complexes . just look at 98 bypass area you just added a 2nd turn lane onto south main st creating a bottle neck on an already crowed street. I live on south main and it's already hard enough to get in or out of my neighborhood. your soon going to have to put up stop lights just so folks CAN get out of their neighborhood.stop creating more problems for this area!! but I know these words fall on deaf ears cause no one down at city hall cares about the folks around here just padding their wallet.then on top of all that you want to raise fee's on us to pay for the added services!! enough is enough.	No revision. North Carolina General Statutues limit the authority of municipalities to establish a temporary moratorium particularly governing residential uses. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth.
	Please stop the building of apartments and townhouses as the volumes of people are very high and traffic is already very high, especially in the area around Traditions. We prefer to maintain the character of the small town and not overcrowd it. We are losing character by adding so many massive buildings. Also the schools are struggling to keep up as it is. Thank you.	No revision. The Plan identifies that there is a strong need to increasing housing choices and attainability for all income groups, stages of life, and backgrounds.
	I moved here from Cary due to the insane growth. I am concerned Wake Forest will repeat many of the same missteps, all for the sake of more tax revenue, sacrificing many of the characteristics that make this a unique and appealing community. A freeze on much of the growth for the next decade, as many have stated, is logical. Our current focus should be on connecting all greenways, preventing any further loss of trees within reason, revitalizing downtown, establishing a park on the east side of the city limits (do something with the reservoir!), and expanding roads and infrastructure to support anticipated future development. Rogers, 98, and the Averette corridor are my primary areas of concern.	Added action item to update Parks, Recreation, & Cultural Resources Master Plan.

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	Growth is inevitable, and I support "strategic" such growth. I agree with others that far too many developments have been allowed to clear all the trees from developments far too often, no doubt in the name of expediency and feel that should be addressed. I further agree with others re Rogers Rd being a very busy artery that should be widened all the way to Rolesville to alleviate congestion. I've since moved from Heritage to Tryon and hope that as developments grow along Averitt and eventually Oak Grove Church that smart development, including road widening, is addressed before it gets too far. I particularly liked the citing of North Hills in the plan as an ideal example of neighborhood with its vibrant mix of shops, restaurants, condos, and housing for walkable/bikeable living. Lastly, I support the notion mentioned of improving building facades and enforcing new developments to have such. I've long felt that Main Street along the area of Walmart to be rather unattractive, especially that shopping center itself. Hopefully that can be improved.	No revision. Action item 22-6 (formerly 18-6) included. The Comprehensive Transportation Plan (CTP) identifies ultimate roadway cross sections. As development occurs, roadway widening occurs.
	Our concern is the lack of adequate infrastructure to support past and current growth in the Rogers Road area. The area is already very congested with the existing schools and shopping. Now a large apartment complex is under construction next to Harris Teeter! Will the new community plan ensure that in the future adequate infrastructure is in place at the time of new construction? We would like to see no more construction in the vicinity of Rogers Road and Forestville Road. Leave whatever trees remain in place!	No revision. The Comprehensive Transportation Plan (CTP) models the infrastructure needed based on projected growth. Action item 22-6 (formerly 18-6) included.

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	We are fully on the path to ugly suburbia. The difference in just the 15 years I have been a resident is astounding. No concern for trees or green spaces. It's all about cars, shopping, and housing. We need a moratorium on growth until we can fully realize the impact of what has already been done. I ask each and every person reading this to consider if they love Wake Forest or do they want Cary 2.0? Stop the unbridled growth and keep the Forest. We already joke "where the college used to be" do we also want to add: and also the trees?	No revision. North Carolina General Statutes limit the authority of municipalities to establish a temporary moratorium particularly governing residential uses.
	Growth is inevitable, but high-traffic roads such as Rogers Rd in particular, desperately need to have a fully connected sidewalk, and to be widened fully to four lanes. There are four+ schools on Rogers and the sidewalks are not complete. This should absolutely be a priority.	No revision. Please reference the Future Pedestrian and Greenway Network Maps in the Comprehensive Transportation Plan.
	The statement about no more tree canopy is correct. There seems to be more focus on incorporating and developing new spaces instead of looking at existing developed sites that can be used for a new purpose. Growth is important for the town for revenue generation but the current plan does not take into consideration protecting the surrounding environment. Question - In reviewing the draft plan, pages 14 and 15 indicated 725% increase in population between 1990 and 2020. Is the increase in population impacted by any change in annexation or incorporation i.e. expansion of the town limits? Looking at the number for Wake County and the State, this number for the Town seems inflated.	Action items added to Green Space Preservation and Tree Canopy.

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	Please consider the recent rezoning for the three commercial properties on South Allen Rd in your land use designations for those properties. The rezoning was unanimously approved by the BOC at the end of 2021 in order to remove the possibility of large multi-family (apartments) being built in the middle of an established community. Conversely, the proposed land use in the current draft of the community plan paves the way for a future UDO to support rezoning those properties right BACK to a category that would allow (and actively encourage) apartments. Specifically, the “Transit Supportive” designation, which is what is currently proposed for 306 South Allen, calls for “higher intensity housing” and “taller building heights,” which is in direct opposition to the wishes of the BOC, community members and businesses, expressed through unanimous vote, just weeks ago. Please revise the proposed land use for those unique properties in such a way that it reflects the spirit and supports the intention behind the recent rezoning. Changing 306 South Allen to Conventional Residential would allow for the property to be earmarked for senior- supportive housing, while at the same time discouraging future rezoning that would allow 4-6 story apartments to be built there.	Professional Services added as a supporting use to Mixed Residential and Transit-Supportive Residential land use descriptions. For 306 S. Allen Rd., map revised to Mixed Residential and Residential Area Plan description #6 states multifamily development should be avoided.

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	My first question that should be answered in the plan would be "Why do we need or want to grow our town?" It's not a forgone conclusion that we have to grow so what are the incentives for this much expansion so quickly? The benefits of the concept of different land use categories is that you can visualize how the city will support our population whatever their stage of life or configuration of family. I like the case studies but I've not seen you show a case study for the overall feel of the town showing success for this strategy in other areas of the country. For instance, what other towns of our size that have grown this fast have had success in keeping their small town feel? I feel that should have been researched and used as a model for what would work well here. That's the "best in class" idea. Your second question refers to the goals section of the plan and I believe that a lot of our community's goals are covered here but there is an elephant in the room surrounding the transportation plan to support this growth. It would have been helpful to show how that will play out. We have so many new lights, crossroads, housing developments that it seems like a huge uphill battle to get the transportation done correctly.	

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	The goal of multi mode transportation is in line with what I heard and expressed at the visioning meetings. The current bike trail map needs some improvement. for instance to get from the east side of town to downtown its a bit out of the way. There needs to be some connecting east/west trails so that we can walk or commute by bike to the industrial/commercial areas from the residential areas easily. For an example if you live in Traditions and followed the bike routes you would cross over 98 going south, cut over to smith creek trail then go back north under 98 to pop out near downtown. There should be a straight shot up Wait ave to downtown from Traditions.	

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	There are other issues like this with neighborhoods all over town. So the emphasis is on the new developments having multi use trails but we need to connect the existing houses. I see a significant area that is not addressed at all. Wildlife conservation and protection. In this day and age we should be taking this into consideration right from the beginning. Anecdotally the birds are disappearing from our back yards. Is this due to the removal of the tree canopy? As we divide up the land into islands our wildlife will be unable to live within the town for us to enjoy. This will hurt our quality of life as well as tourism. Why is this not being addressed? The sentiment from those I have spoken with is a general feeling of "it's too late to change anything now". Is that the case? I hope it isn't the case. I hope that those of us who are invested in this community can bring our concerns and have them addressed. I think a campaign that makes it clear that people do have a say will increase input tremendously. I'd like to see in the draft land use plan the future schools, grocery stores and gas stations needed. I believe we need another high school and many middle and elementary schools but I'm not seeing them built out on the east side of town. The community live work play goal is great but there aren't many commercial areas on the east sides of towns. There are food deserts all over this town where there are no groceries or corner stores or restaurants. That means that many people are driving long distances in town. I'd like to see a plan to place more amenities on the east side where all the new developments are going in on 98, Jones Dairy and Forestville. If we have to	

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	drive to Rogers road or Main street or Capital for gas and groceries and schools it is going to be very congested. How does the plan address these issues? Is there a part of the community plan that can work with the neighboring towns for amenities and transportation? I would like to see discussion of cooperation with all our neighboring cities showing how they plan to integrate with us for traffic management to downtown Raleigh, suburban sprawl, amenities etc. Additional school districts and educational opportunities for our residents.	Text revised on pg. 33. Green Space Preservation additional considerations revised to mention wildlife habitat. Provided comment regarding greenways to Transportation Planner.
	Lots that has been done and is currently developing is great to see. I'm proud of all the work the town is doing. After viewing the plan for the Suntrust buildings I'm certainly happy to see it not become a CVS or Walgreens and happy that the town was able to step in to (hopefully) develop things in a way that is more in keeping with a healthy urban downtown (not that	

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	generous sidewalks as the presenter noted are what I'd call a selling point to the public). Please always do this if the need arises. A few things I was hoping to see more of a concrete plan around is the development of the greenway in the downtown renaissance area. The plan outlined in that original 2017 document certainly echos what I see on page 74, but progress for this hasn't actually came to fruition over this 5 year period. I don't see these on the action matrix at all! My concern is developments around the area will only further complicate and reduce the likelihood of these things actually happening. Holding Village, Franklin street townhomes, Forest on Franklin,Grove 98, and the currently planned White st Townhomes all were or are developments that take away greenspace, but havent offered the public (Seeing the page 78 concerns along with mine) anything in return (aside from a tax base) to expand the greenway in these areas. I would feel much better if this was addressed in a more concrete way. What do we need to get this done? Will a person living in downtown Wake Forest ever have safe easy access to the greenway system? For example Could perhaps the pond west of Kiwanis park and the proposed loop in the development (currently planned halfway around it) be made into a greenway space in addition to the townhomes planned? This type of idea is in keeping with both goals of increasing access the greenspace, serving the desired density, and not strictly getting rid of trees. I'd also love to see the Holding Village development get pedestrian access to franklin st, given this would give access to downtown to so many people! On Page 57 the concept of redeveloping the Renaissance Centre is a long overdue and great idea! Currently the level of talent/lack of higher level musical acts certainly suppresses the potential of the space/ requires more subsidy than a venue should (given it was a repurposed space in the 1st place there is only so much that can currently be done. Plus I know covid didn't	

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	neip). The note about improving the government facilities is also nice to see given the post office and surrounding land could certainly use some love, though it is great to have pedestrian access wise! On page 58 mention of ADU's is something I am interested in seeing added in, knowing Raleigh is developing standards for. It also is a smart way to deal with increased housing prices/ need for affordable spaces. On page 62 the recommendation to require a minimum mix of housing I think is necessary for larger developments. Page 65 Capitol Blvd improvements are 1000% needed, I know the town has a list of concerns. My only comment would be that the interest in the greater public vs any individual business should take priority. Given the total number of people that would benefits greatly outweighing those concerns. Page 68 the Burying of utility lines and partnering in any new developments in the renaissance area I am very supportive of, power house row looks great much in due part to the towns work on the utilities. I appreciate public power and the linemen! Page 71 Equity in park development. I'd certainly love to see the more aged/older parks in the area get a face lift, knowing these are the places where green space will actually survive long term I want to see these grow and be accessible. Page 76-77 I am highly supportive of the S line and a station downtown! That area is the exact part of downtown that would be served and offer a great impression to visitors on arrival! One note would be what that experience looks like as they arrive is something I'm not sure the UDO covers aside from	

Engage Wake Forest
January 11, 2022 Draft

Page	Comment	Response
	developing so all 4 sides of a building look good. A tree buffer or consideration of green space along the rail line would be smart to consider. New developments along the future S-line are also a concern of mine, PLEASE make sure we keep this in mind that all future buffer zones are not affected today. Page 95 Point 17-3 Is there a place where we can propose or see the land purchased by the town over time without hunting through maps? I'd love for there to be more of this knowing how much development is occurring. Given there is no easy way of going back, I think the public would love to know what this looks like. Page 96 points 19-6&7 Both really great to see! Would love for the adaptive reuse maps to be publicly viewable online. Love what's been done at Loading dock and see adaptive reuse as a great way to maintain the town's character. Page 97 point 22-4 Supporting younger families would be great from a retail and parks standpoint. We love Lumpy's and playing at town hall, as well as going to HL Miller park (though it really needs some love). Improving Kiwanis park or expanding it along the southern parking lot would be great to see! point 20-1 and 20-9 I'd love to see renovating the Renaissance Centre advanced even if it meant a public private partnership. The Renaissance Centre currently is a weakness. This is coming from a person who highly supports the arts! point 20-2 Could the town elaborate on what a recreation facility that has regional draw means? Like the sound but not sure what this means Thank you for all the hard work put into this document!	No revision. Please reference the Future Pedestrian and Greenway Network Maps in the Comprehensive Transportation Plan.

Comments Sent To Planning Board or Received Since Planning Board Meeting
Comments on March 2, 2022 Draft

Page	Comment	Response
	Would like to see The Corner become an ice cream parlor again. I don't know how the town could do this maybe involve the Chamber & have them target business owners that wish to do this. It was an ice cream parlor up until we merged with the City of Raleigh water.	Town does not have ability to regulate specific retail uses.
	Idea for a community Forest / nature preserve on the property that the Town of Wake Forest owns north of envision science academy	The land is not owned by the Town of Wake Forest and is privately owned. Land is located in Wake County's planning jurisdiction and cannot be included in our draft Community Plan.
	Underpass for heritage high students to safely cross the street so they can access the shopping center down the street.	Pedestrian signals are located at the intersection of Foundation Dr. and Forestville for students to safely cross the street and access the shopping center.
	Request from development team to revise Residential Area #1 text: Once the Wake Forest County Club, this large property at Capital Boulevard and Country Club Drive now sits abandoned and requires a balanced perspective for redevelopment which respects established neighborhoods while accommodating the Town's growth. Ultimately, this will require a mix of housing ranging from single family homes to multifamily development to achieve a higher density. To preserve and protect environmentally sensitive areas such as Horse Creek, existing ponds, and floodplains; a clustered development is desirable. Additionally, thoughtful site design including stream crossings that minimize environmental impacts should be employed. Development west of Horse Creek should be contextually similar to adjacent Town land use patterns. Pedestrian and bicycle connections should be provided within the site to accommodate future connectivity to nearby commercial areas along Capital Boulevard and east towards E. Carrol Joyner Park.	No revision.
	Revise Church Initiative land use designation to Office, Civic, & Institutional	Professional Services added as a supporting use to Mixed Residential and Transit-Supportive Residential land use descriptions in March 2 draft.

Comments Sent To Planning Board or Received Since Planning Board Meeting
Comments on March 2, 2022 Draft

Page	Comment	Response
	Topic #1. The town has split my property into two sides an eastern and western side - and has labeled the western commercial and the eastern residential. Obviously, this was done without any consideration of the property- only the location of where they want certain development. The property should have been divided north and south with the residential to the north of Lowes Avenue extended and the commercial to the south of Lowes Avenue extended/ My whole property is zoned commercial. On the current map, the elevation makes it impossible for the commercial development to have public access. The road would be a private commercial road that the town would not take over because of the 11% grade. I have previously had this confirmed by the town. A few years ago the town verbally accepted a traffic study and other necessary considerations for an apartment development on this western site. But when the builder's representative came to see them, they denied these approvals. And they made up several additional unfounded and inaccurate reasons to deny the application. I had spent 2 years working directly with the builder. I asked to meet with the planning department to discuss their denial. It was a week before I was allowed to speak to them in person. They were very apologetic for all their "errors." I wasn't surprised at what they had done. I had been told behind closed doors a year before that if I made an application for apartments, it would not be allowed to go through. Now the town wants me to build apartments on the eastern edge of the	No revision. The Plan identifies the portion along US-1 as Corridor Commercial and the eastern portion as transit supportive

Comments Sent To Planning Board or Received Since Planning Board Meeting
Comments on March 2, 2022 Draft

Page	Comment	Response
	property - an area negatively affected by - a place that has about 1 (one) acre available for development. The towns refusal to let me put detention ponds in the buffers, the proposed Ligon Mill Rd, the existing power line, the state and town watershed rules, and the Richland Creek restraints have constricted my development in this area.	Commercial and the eastern portion as transit supportive residential. The area is also within an activity center which would allow for a unique, pedestrian oriented developments. The Community Plan is a guiding document and is not proposing to amend any zoning entitlements.

Comments Sent To Planning Board or Received Since Planning Board Meeting
Comments on March 2, 2022 Draft

Page	Comment	Response
	The town is requesting commercial development in the place I had designated for the apartments to be located - the ones they turned down. It will be difficult to have commercial development here, because the access will be a private commercial road with 11% grade. No one down town has examined the property. They just have just made sketches of what they want - not what is possible or practical. They have made a colored picture showing how much developable property I have. It includes mostly flood planes and power lines. So the actual developable area has been extremely overstated. Topic #2. The idea of turning a building so that you cannot see the parking lot is terrible as well as covering the front of the building with trees. It is an easy decision for the town but an irresponsible design for commercial development. Businesses pay top dollar to be seen by the public. Even Wegmans spent a fortune to be high enough to be seen from the bypass. But I can take you to developments in our area and in Chapel Hill that have failed, because they were hidden from view by such rules. Years ago I presented this same argument before the commissioners when the designer had been asked by the planning board to use the McGregor shopping area on highway 64 as a model for Wake Forest. They wanted commercial development on US1 to be covered up by trees. That shopping center was already failing. Only 2 store remained	

Comments Sent To Planning Board or Received Since Planning Board Meeting
Comments on March 2, 2022 Draft

Page	Comment	Response
	a tobacco shop and a bakery. It had already been flipped twice. Most stores were closed. It was completely covered from view by dense trees. I went to see that shopping center a few months ago. It has been torn down and replaced by an office building and a small hotel. In the rear there are a few restaurants. There are very strong design covenants on the US1 property to the north of Lowes Home Improvement right along the service road on US 1 and beside the old Verizon store. The covenants include hidden parking for trucks with signage, trash compactors, etc. The Verizon store was built to those standards. But the town covered that property with trees so that it could not be seen from US1. Eventually Verizon had to abandon their building and move to another site. You cannot see the Target store or the Staples store from US1, yet we all saw them clearly as they were being constructed. On the other hand the Seminary property on US1 has very few trees, and you can actually see many of their stores from the street. Looks fine to me. Must be good for business. There are always a lot of cars there. Have you ever tried to make a left hand turn out of Home Depot onto Retail Drive. It is very dangerous because of the over planting of bushes meant to hide the Home Depot parking lot. My property behind the Lowes Home Improvement has very strong recorded covenants required by Lowes. There is a long list of unacceptable commercial businesses which Lowes does not allow on my property. And there is a provision which allows a business to clean up another business that becomes an eyesore as well as a method to be reimbursed for the expense. Surely with some modifications I could keep my property looking nice instead of having the roads (like Ligon Mill Rd) covered up.	No revision since ordinance related comment. Comment provided to UDO project manager.

Comments Sent To Planning Board or Received Since Planning Board Meeting
Comments on March 2, 2022 Draft

Page	Comment	Response
	Topic 3 In June 2021 I contacted Brandon Jones about Ligon Mill Rd. when I noticed neither Ligon Mill Rd nor the bridge over Richland Creek was on the map at their website. He replied, On June 12, 2021 He wrote : Ms. Rolls, I have sent your message to our U-5307 (US 1) project team for review. Once I here back I can provide better information to you. Thanks, Brandon Jones, PE June 16, 2021 Mrs. Rolls, I will follow up by email. At this point our US 1 project will not have any impacts to your property and does not include any portion of the Ligon Mill Road extension. We are following up with Town staff and I will let you know once that conversation has taken place. Brandon Jones, PE I have also spoken with a NCDOT representative regarding the NCDOT guidelines for taking over a an existing road or having a road built by NCDOT. I was told that the NCDOT does not take over roads that have a bridge or will	

Comments Sent To Planning Board or Received Since Planning Board Meeting
Comments on March 2, 2022 Draft

Page	Comment	Response
	need a bridge. Ligon Mill cannot come north unless there is a bridge across Richland Creek. It is too expensive for me to build Ligon Mill Rd and the bridge. I have a collector street, Lowes Avenue, that satisfied my development needs. It is a public road that has been taken over by the town. I paid for a collector street, Lowes Avenue, in my negotiations with Lowes. There is a town policy that states that the party that creates the need for infrastructure must pay for it. Yet the town made a rule that directly offends that policy. It said if the town wants a road the developer has to build it. This needs to be addressed. When the Mountaineer property was purchased they built a cul de sac on their property. I offered to connect that street to my internal roads in my next land plan. They were delighted, because they didn't like the cul de sac. When the plan expired, I offered to connect them to a parking lot next to their property. They said - fine. Now the town has drawn a second collector street from Mountaineer across my valuable development area to Ligon Mill Rd. The town claims there was always a collector street there. This is not true. There was a collector street planned for the Druely property north of the Mountaineer property. You can see a small apron for this road on Galaxy. It clearly is not on the Mountaineer property. When Lowes Home Improvement was built, the the town was asked to accept Lowes Avenue as a collector street to replace of the one north of the Mountaineer Property. The town agreed. I suggest that the town start a new policy and follow the requirement they would put on any developer. They must approach the landowner and have a meeting with the that owner before making changes or additions to the rules or restrictions that would affect their property. I understand most people downtown do not know all the facts. The town needs to consult directly with the land owner.	The Town included in their U-5307 Resolution of Support with Recommended Changes to NCDOT that Ligon Mill Road should be included in their study area as it is serving as a primary north/south service road in Wake Forest on the east side of US-1. Comments related to Comprehensive Transportation Plan provided to Transportation Planner.

Comments Sent To Planning Board or Received Since Planning Board Meeting
Comments on March 2, 2022 Draft

Page	Comment	Response
	The UFB wants to go on the record as supporting the approval of the proposed 2022 Community Plan. Community Plan does not explicitly state, but is aligned with, an idea we call "Pathways" that can help ensure the survival of our remaining urban forest in way that will enhance the quality of life for Wake Forest's citizens now, and in the future. What follows are "Pathways" and aligned actions and statements quoted from the 2022 Community Plan. The Urban Forestry Board recommends that the Town of Wake Forest commits, as soon as the 2022 Community Plan is approved, to the acquisition of land through purchase and/or all other appropriate means, for the purpose of allowing citizens and visitors to enjoy access to Pathways in & Connecting Urban Forests. The key word is "Connecting." Many housing developments currently lack convenient, safe access for pedestrians and bicycles to the existing greenways and parks. Those residents must drive. The vision of Pathways is to urgently act to expand safe, convenient pedestrian and bicycle access in a way that is aligned with actions and statements already in the Community Plan, and that will be helpful in preserving our remaining Urban Forest. We believe that when citizens can conveniently move through urban forest	

Comments Sent To Planning Board or Received Since Planning Board Meeting
Comments on March 2, 2022 Draft

Page	Comment	Response
	they have a stake in preserving that joy for future generations. We think success will require: identification of connecting properties; designation of these properties as critical; and acquisition through purchase or other means. Success requires time urgency because critical properties are continually sold. We think Pathways is a good idea because: the best way to guarantee protection of our remaining forest and connecting open spaces is to own them and our fellow citizens want to have access to walkable pathways through urban forest-the Community Plan makes this clear.	No revision. The Plan identifies that there is a strong need to support preservation of urban tree canopy which is weaved through the various action items. The Plan also identifies that there is strong need to update the Parks, Recreation, and Cultural Resources Master Plan and the action item to update this plan is included as short term. Comments related to connecting open spaces and providing connections have been provided to the UDO project manager.
	Revise housing type recommendation from “Appropriate housing types include multifamily, two-over-twos, duplexes, and townhomes that are affordable to households earning 60 to 120 percent of the area’s medium income (AMI)” to “Appropriate housing types include multifamily, two-over-twos, duplexes, and townhomes. Adopt tools and strategies to encourage development of housing that are affordable to households earning 60 to 120 percent of the area’s median income (AMI).”	Description to be revised for clarity.

Comments Sent To Planning Board or Received Since Planning Board Meeting
Comments on March 2, 2022 Draft

Page	Comment	Response
	The January 11, 2022 version of the Community Plan referenced the “Joyner Property” on Capital Boulevard, but the version dated March 2, 2022 now calls that land the “Former Wake Forest Golf Course.” Why the change in the name? The property has not had an operating golf course on it for 15 years. All the other properties in the plan are identified by the roads on which they are located - I would think that the Town would want to be consistent and use the same methodology for naming this tract in the Community Plan. Most importantly, the language now states that “development (be) only permitted east of Horse Creek and north of the existing ponds running parallel to County Club Drive.” This removes approximately 50 of the 150 acres from development – one third of the land! To my knowledge, nobody from the Town reached out to the property owner to get his input before making 1/3 of his property undevelopable – how is that possible? Isn’t this a “taking” by the Town? The current Wake Forest Community Plan anticipates that the entire property will be developed and does not show the 50 acres as being undevelopable. The Current Zoning map (pgs. 10-11) shows the entire property as “General Residential 3” allowing development of up to 3 units per acre, and the Land Use Plan map (pgs. 46-47) shows the entire property as “Conventional Residential.” Additionally, there is an existing stub road, Simpson Drive, providing access to the area west of Horse Creek. Why would a stub road have been approved by the Town and subsequently built by the	

Comments Sent To Planning Board or Received Since Planning Board Meeting
Comments on March 2, 2022 Draft

Page	Comment	Response
	developer of Country Club Downs unless that area west of Horse Creek was approved to be developed? There are also covenants recorded against the property west of Horse Creek requiring a minimum lot size for the property – clearly the development of this land has been anticipated and planned for. I strongly recommend that the Community Plan be revised to name this property with a road designation (maybe “Northwest Capital Boulevard”) and use the following language: Once the Wake Forest County Club, this large property at Capital Boulevard and Country Club Drive now sits abandoned and requires a balanced perspective for redevelopment which respects established neighborhoods while accommodating the Town’s growth. Ultimately, this will require a mix of housing, ranging from single family homes to multifamily development to achieve a higher density. To preserve and protect environmentally sensitive areas such as Horse Creek, existing ponds, and floodplains, a clustered development is desirable. Additionally, thoughtful site design including stream crossings that minimize environmental impacts should be employed. Development west of Horse Creek should be contextually similar to adjacent Town land use patterns. Pedestrian and bicycle connections should be provided within the site to accommodate future connectivity to nearby commercial areas along Capital Boulevard and east towards E. Carrol Joyner Park.	No revision proposed at this time. The Community Plan will be evaluated regularly to determine if the plan is reflective of current conditions and/or shifts in community priorities and if any amendments are necessary. Also, if the zoning map is amended that is inconsistent with the Community Plan, state law states that it also amends the future land use map in the Plan.

ORDINANCE 2022-XXX

ORDINANCE OF THE BOARD OF COMMISSIONERS
OF THE TOWN OF WAKE FOREST
TO AMEND THE COMMUNITY PLAN (CPA-22-01)

WHEREAS, the Town of Wake Forest has grown significantly since the adoption of the 2009 Community Plan; and

WHEREAS, adoption of the Community Plan will offer guidance on a long-term vision for the Town to implement over the next 10-20 years; and

WHEREAS, the Town has conducted a 21-month planning process that has engaged thousands of citizens; and

WHEREAS, the planning process led to the development of policy recommendations and an action matrix found within the Community Plan; and

WHEREAS, in addition to the policy recommendations, the Community Plan includes a Land Use Plan that seeks to ensure Wake Forest remains a desirable and sustainable community while continuing to develop and diversify; and

WHEREAS, the application submitted by the Town of Wake Forest to update the Community Plan was duly filed with the Planning Department; and

WHEREAS, the Planning Board held a public comment session on January 31, 2022 and the Board of Commissioners held a public hearing on April 19, 2022; and

WHEREAS, a print ad was published in a paper of general circulation for the public comment session and public hearing pursuant with G.S. § 160D-602 and the Unified Development Ordinance; and

WHEREAS, the Planning Board at their March 8, 2022 meeting voted unanimously to recommend approval with conditions of said application to amend the Community Plan; and

NOW, THEREFORE, BE IT ORDAINED BY THE BOARD OF COMMISSIONERS OF THE TOWN OF WAKE FOREST:

Section 1. Adopts the 2022 Community Plan (Exhibit 1) and Plan revisions (Exhibit 2).

Section 2. Repeals the 2009 Community Plan.

Section 3. Deems the 2022 Community Plan effective immediately upon adoption.

This the ____ day of _____ 2022.

TOWN OF WAKE FOREST

Mayor

ATTEST:

Deputy Town Clerk

APPROVED AS TO FORM:

Town Attorney



TOWN OF WAKE FOREST Community Plan

REVISED DRAFT — March 2, 2022

ACKNOWLEDGMENTS

Board of Commissioners

Vivian Jones, Mayor

Adam Wright, Commissioner

Bridget Wall-Lennon, Commissioner
(through December 2021)

Chad Sary, Commissioner

Jim Dyer, Commissioner

Keith Shackelford, Commissioner

Liz Simpers, Commissioner
(through December 2021)

Nick Sliwinski, Commissioner

Planning Board

Joe Kimray, Chair

Karin Kuropas, Vice-Chair

Colleen Sharpe, Board Member
(through December 2021)

Christopher Joyner, Board Member

Michael Siderio, Board Member

Michael Hickey, Board Member

Shiela Bishop, Board Member

Thomas Ballman, Board Member

Steering Committee

Ann Welton

Jacob Anderson

Joseph Lassiter

Kenneth Christie

Leeann Tedder

Ryan Akers

Sheneque Duncan

Shipman Northcutt

Shynese Hockaday

Stacey Mortiz

Timothy Shail

Zee Khan

Town Departments

Administration

Communications

Downtown Development

Economic Development

Finance

Fire

Human Resources

Inspections

Information Technology

Parks, Recreation & Cultural
Resources

Police

Public Works

Wake Forest Power

Wake Forest Renaissance Centre

Planning Staff

Courtney Tanner,
Planning Director

Jennifer Currin,
Assistant Planning Director

Brad West,
Long Range Planning Manager

Dylan Bruchhaus,
Planner II - Long Range

Michelle Michael,
Senior Planner -
Historic Preservation

Ben Coleman,
Zoning Enforcement Officer

Josh Michael,
Planning Administrative Assistant

Kari Grace,
Senior Planner -
Development Services

Patrick Reidy,
Senior Planner -
Development Services

Emma Linn,
Planner I - Development Services

Thanks to Those Who Participated

A special thank you goes to everyone who participated in the planning process for the Wake Forest Community Plan. This Plan was made possible by the contributions and insights of the residents, business owners, property owners, developers, and representatives from various groups and organizations.

Project Consultant



We are an innovation-based urban planning and design firm. We pride ourselves on creativity, collaboration, and delivery of quality. Our team approach is built on strong relationships, the exchange of ideas, and a commitment to the integration of technology. Our priorities are to do good, have fun, work hard, and provide responsive, visionary, and viable solutions to our clients and partners.

TABLE OF CONTENTS

1

PLAN CONTEXT

What is the Community Plan?	3
Regional Setting	4
History	6
Planning Area	7
Existing Land Use	8
Current Zoning	10
Overlay Districts	12
Demographic Snapshot	14
Past Plans & Studies	22
Community Outreach	24

2

Vision & Goals

Vision Statement	29
Goals	30

3

Land Use & Development

Why is a Land Use Plan Important?	33
Sustainable Growth	33
Planning Jurisdiction	34
Growth Strategy	35
Land Use Plan	36
TOD & Activity Center Areas	48
Residential Areas Plan	50
Commercial & Industrial Areas Plan	54
Downtown Area Plan	58

4

Additional Considerations

Housing Affordability	63
Residential Character	64
Senior Housing	65
Commercial Development	66
Minority & Women-Owned Businesses	67
Setbacks	68
Parking Lots	68
Screening & Buffering	69
Community Character	70
Utility Lines	70
Historic Preservation	71
Community Facilities	72
Public Transit	74
S-Line	75
Capital Boulevard	76
Street Connectivity	77
Sidewalks & Multi-Use Paths	78
Bikeways, Greenways & Trails	79
Local Food Systems	80
Conservation Design	81
Green Space Preservation	82
Tree Canopy	83
Sustainable Development	84
Tourism	86
Gateways	88
Downtown Wake Forest	89

5

Implementation

Next Steps	91
Partners	92
Action Matrix	93

PLAN CONTEXT

The Town of Wake Forest is a fast-growing community positioned just north of Raleigh and northeast of North Carolina's Research Triangle Park. Incorporated in 1909, the Town grew as a community of rich heritage, small-town character, home to a vibrant and historic Downtown, festivals and events, and scenic natural areas cherished by its residents. Over the past two decades, the Town has experienced unprecedented growth reflective of the surrounding region, prompting new development that has been primarily residential. Today, residents enjoy attractive suburban living with access to nearby urban amenities.

In August 2020, the Town initiated an update to the Wake Forest Community Plan to address Wake Forest's continual growth and ensure future development supports a thriving community with a high quality of life. The planning process included an extensive analysis of existing conditions and robust community engagement to identify unique issues and opportunities within the Town. Together, these components formed the vision, goals, and recommendations of this Community Plan. The Plan establishes a roadmap for how Wake Forest should develop and grow over the next 10 to 20 years to achieve its vision along with the critical steps necessary to do so.

WHAT IS THE COMMUNITY PLAN?

The Community Plan Update and Future Land Use Map (Community Plan) is Wake Forest's new comprehensive land use plan that creates a long-term vision for the Town to implement over the next 10 to 20 years. The Community Plan is built off past planning efforts, existing policies that remain relevant, and at its core, community input from a wide-ranging outreach process. It presents a cohesive vision that is representative of Wake Forest's residents, business community, and community stakeholders. The Community Plan outlines the critical steps essential to ensure future growth and development in the Town aligns with the community's priorities.

The Community Plan is a product of an 21-month planning process that included considerable community engagement. It began in the summer of 2020 and ended spring of 2022. The planning process included the seven steps below:



PROJECT BRANDING

To better brand the Community Plan, the logo above was created for the planning process.

1. Project Initiation

This step included project kick-off meetings with Town staff, the Board of Commissioners, and Town Department Heads to discuss the overall direction of the Community Plan and any policy issues facing the Town.

3. Existing Conditions

This step included data collection from the Town, community service providers, local agencies, and on-the-ground reconnaissance, which provided the foundation for analysis of existing conditions in Wake Forest.

5. Vision & Goals

This step included a virtual Visioning Workshop where community members worked together to craft a long-term vision for Wake Forest. The results of the workshop provided focus and direction for subsequent planning activities, including the Plan's vision statement, goals, and key recommendations.

7. Plan Adoption

This step included the development of an implementation program utilizing the recommendations completed in Step 6. Upon revisions from Town staff, officials, and public input, the final Community Plan was presented to the Planning Board and Board of Commissioners for consideration and adoption.

2020

2022

Step #1

Step #2

Step #3

Step #4

Step #5

Step #6

Step #7

2. Outreach & Engagement

This step included collecting feedback from members of the community on their recommendations, concerns, and ideas through meetings, workshops, and a variety of online tools. A focus group, interviews, and Community Advisory Panel meetings were conducted to gain a diverse range of input from key community stakeholders.

4. Fiscal Impact Analysis

This step included a fiscal impact analysis which involved a review of current costs to estimate future expenditures related to growth in population and employment resulting from future development. A fiscal impact model was developed to help the Town analyze future individual rezoning scenarios.

6. Land Use Plan & Map

This step included the preparation of the Plan document and policies that address land use and growth. It established key considerations for housing, economic development, character, transportation, natural resources, community facilities, and tourism. This step is the core of the Community Plan, reflecting the collective community vision for the Town.

REGIONAL SETTING

Part of North Carolina's Research Triangle, Wake Forest is located on the periphery of one of the fastest-growing research and development hubs in the United States. The community is connected to the surrounding region by the major routes US 1, NC Hwy 98, I-540, and US 401, with access to destinations across the world via the Raleigh-Durham International (RDU) Airport located just 17 miles away.

According to the Wake County Planning, Development, and Inspections Department, Wake County has grown by 80% over the past 20 years, with a net average increase of 62 residents per day. The County is projected to gain another 250,000 residents over the next decade with a need for an additional 125,000 to 175,000 new housing units over the next 10 to 15 years. As Wake Forest is among the top 10 fastest growing municipalities in North Carolina, it presents considerable potential for future expansion and development.

RESEARCH TRIANGLE

The Research Triangle is the Raleigh-Durham-Chapel Hill metro area in North Carolina that is anchored by three major research universities: Duke University, University of North Carolina at Chapel Hill, and North Carolina State University. It includes Research Triangle Park (RTP), the largest research park in the country at 7,000 acres, which contains hundreds of companies including science and technology firms, government agencies, academic institutions, start ups, and non-profits. RTP has stimulated major growth in high-tech and research industries, drawing significant employment and business opportunities to the region.





BUTNER

85

15

56

96

FRANKLINTON

LOUISBURG

YOUNGVILLE

401

WAKE FOREST

98

50

540

RDU

MORRISVILLE

54

CARY

NORTH CAROLINA
STATE UNIVERSITY

440

RALEIGH

KNIGHTDALE

ROLESVILLE

96

64

ZEBULON

264

WENDELL

GARNER

HOLLY SPRINGS

401

50

40

CLAYTON

42

FUQUAY-VARINA

42

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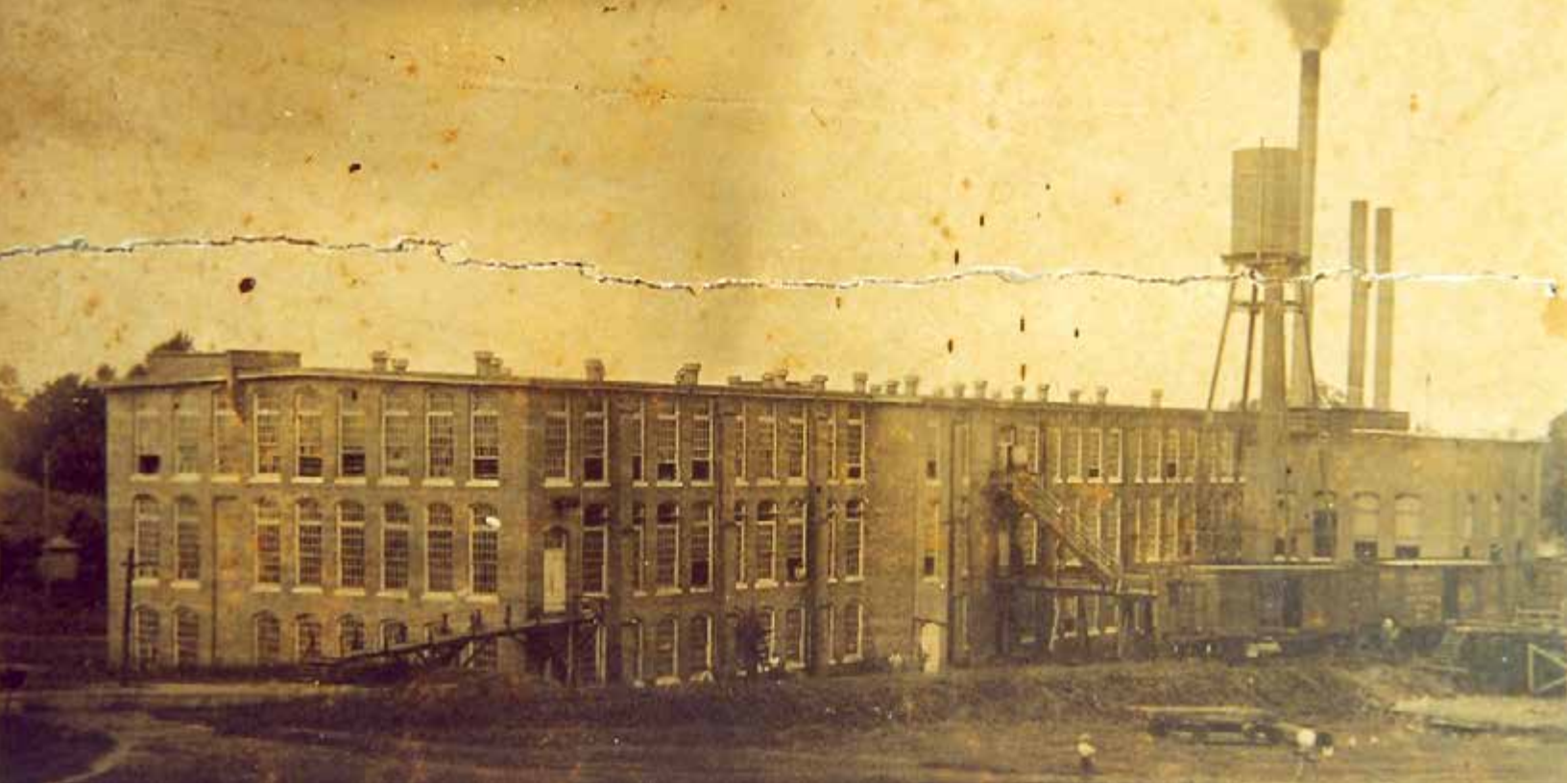
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TOWN OF WAKE FOREST COMMUNITY PLAN UPDATE

REVISED DRAFT
3/2/2022

5

133



The Royall Cotton Mill Building ca. 1910, courtesy of the Wake Forest Historical Museum

HISTORY

The Town of Wake Forest began as a rural and forest district in northern Wake County, North Carolina with its earliest surviving building dating back to circa 1800. In 1820, Calvin Jones purchased a 615-acre plantation from Davis Battle, coining the name Wake Forest when he was postmaster of what was known as the “Forest District of Wake.” The North Carolina Baptist Convention purchased his plantation in 1834 to develop the Wake Forest Manual Labor Institute, which would become Wake Forest College in 1838. The area witnessed growth due to the College, the relocation of the railroad depot from Forestville to Wake Forest in 1874, and the establishment of the Royall Cotton Mill in 1899, one of the State’s largest cotton mills and a major local employer.

In 1909, the North Carolina General Assembly rechartered the community as the Town of Wake Forest, giving the Town authority to sell bonds to build a generator and electric system. US 1’s relocation west of town in 1952, Wake Forest College’s move to Winston-Salem in 1956, and the closure of the mill in 1976 brought significant changes and economic hardship, but the Town persevered. Beginning in the 1990s and continuing today, Wake Forest has experienced a considerable increase in population together with the surrounding region, prompting new residential and economic growth across the community.



Calvin Jones House ca. 1820



Ailey Young House, construction in the mid-late 1800s

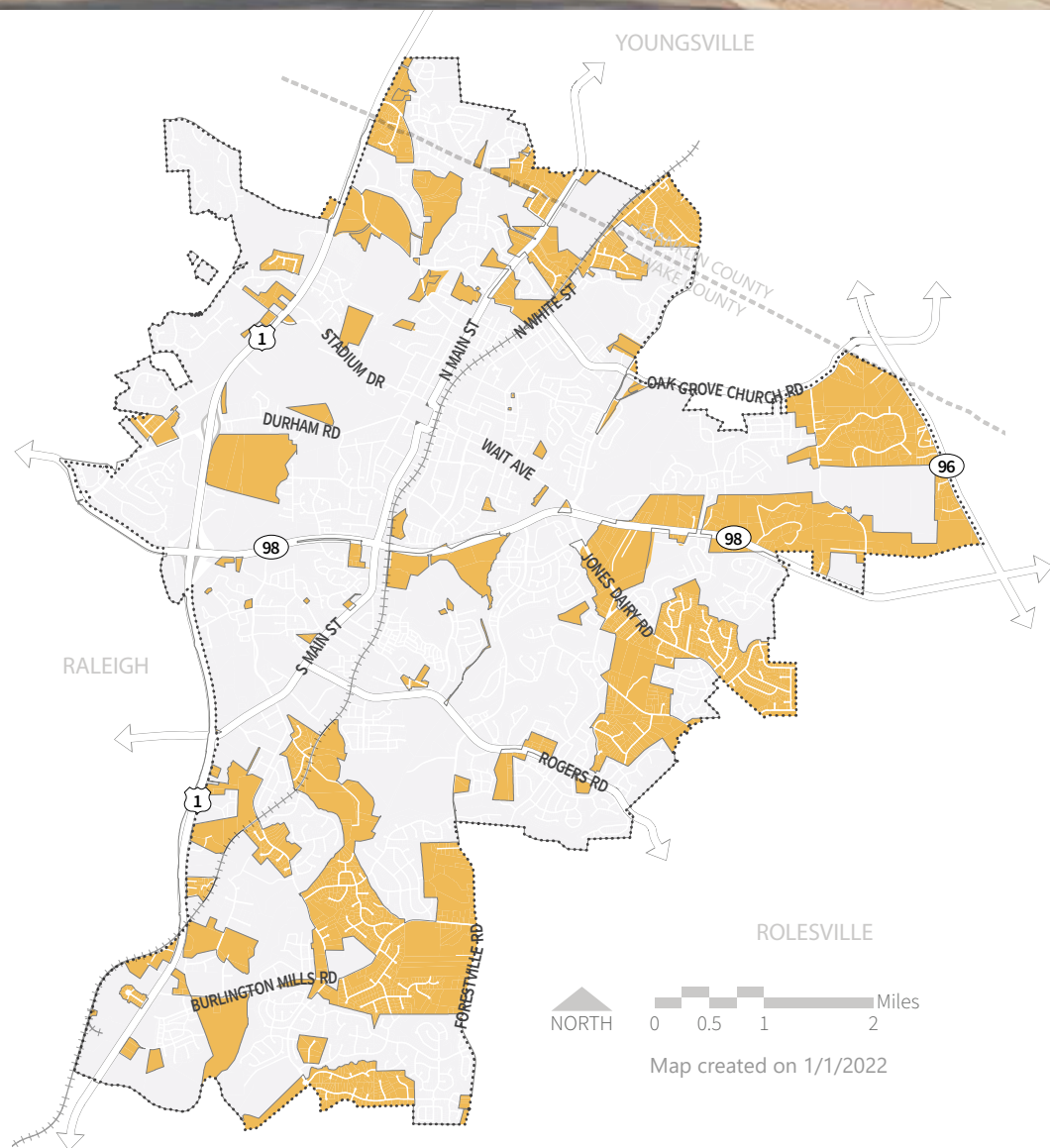


PLANNING AREA

Wake Forest's planning area includes all properties within the Town's municipal boundary, Extraterritorial Jurisdiction (ETJ), and urban service areas. The ETJ contains properties that are subject to Wake Forest's development regulations but are currently unincorporated. The Town maintains annexation agreements with the communities of Raleigh, Rolesville, and Youngsville, delineating the extent to which the Town can plan for annexations and utility extensions.

PLANNING AREA

- ++ Railroad
- Planning Area
- Within Town Limits
- Unincorporated Area
- Town Limits



EXISTING LAND USE

Wake Forest is a unique place to live and work in the Research Triangle region. Existing land uses provide insight into how the Town has grown and developed over time and inform what type of development will be appropriate in the future. The Town's existing land use was inventoried based on field reconnaissance and research conducted in October 2020. All parcels within the planning area have been categorized into one of the following 15 land use classifications:

Single-Family Detached

Includes single-family homes occupying individual lots. This is the predominant residential development in the Town. The single-family detached land use includes newer planned subdivisions as well as older established neighborhoods. It also includes manufactured homes and mobile home parks, where detached single-family homes are constructed on a permanent chassis.

Single-Family Attached

Includes single-family attached homes where dwelling units share an exterior wall with at least one adjacent unit. Each dwelling unit has a separate dedicated building entrance. This land use includes townhomes and duplexes.

Multifamily

Includes structures containing multiple dwelling units stacked vertically and/or horizontally. Multifamily housing often features shared building entrances, stairways, hallways, and occasionally amenities. This land use includes apartments, condominiums, two-over-twos, congregate care, and assisted living facilities.

Mixed Use

Includes buildings with two or more distinct uses vertically stacked. Developments usually contain commercial on the ground-floor and residential or office uses above.

Mixed Commercial

Includes properties with a mix of commercial retail, commercial service, or office uses. This use contains individual free-standing structures with different uses on a single property, such as at the southern corner of S Main Street and Rogers Road, as well as large commercial strip buildings containing multiple tenants with varying uses, such as at Gateway Commons.

Commercial Retail

Includes commercial establishments that sell a product, such as grocery stores, gas stations, clothing stores, pharmacies, and home goods stores.

Commercial Service

Includes commercial establishments that sell a service, such as hair salons, auto repair shops, restaurants, drive-thru dining options, and cafes.

Heavy Industrial

Includes facilities involved in the processing of chemicals and plastics, refineries, and industrial machinery. These uses are larger in scale and typically have environmental, noise, and visual impacts on adjacent areas.

Light Industrial

Includes facilities involved in the manufacturing, processing, storage, and distribution of goods and materials. Light industrial uses typically have a minimal impact on surrounding areas and are generally clustered together within established industrial parks.

Office

Includes offices used for professional services as well as medical office uses. Individual small offices, legal firms, and family physicians are included.

Public/Semi-Public

Includes local government uses, municipal facilities, Town-owned parking lots, community service providers, schools, nonprofit organizations, and religious institutions. Examples include Town Hall, fire stations, libraries, places of worship, and Wake County Public Schools.

Parks & Open Space

Includes designated public park spaces managed by the Wake Forest Parks, Recreation, and Cultural Resources Department, as well as private parks and recreational facilities located within traditional subdivision developments. This category also includes preserved natural areas, greenways, active golf courses, detention and retention ponds, and designated open spaces areas within private developments.

Agriculture

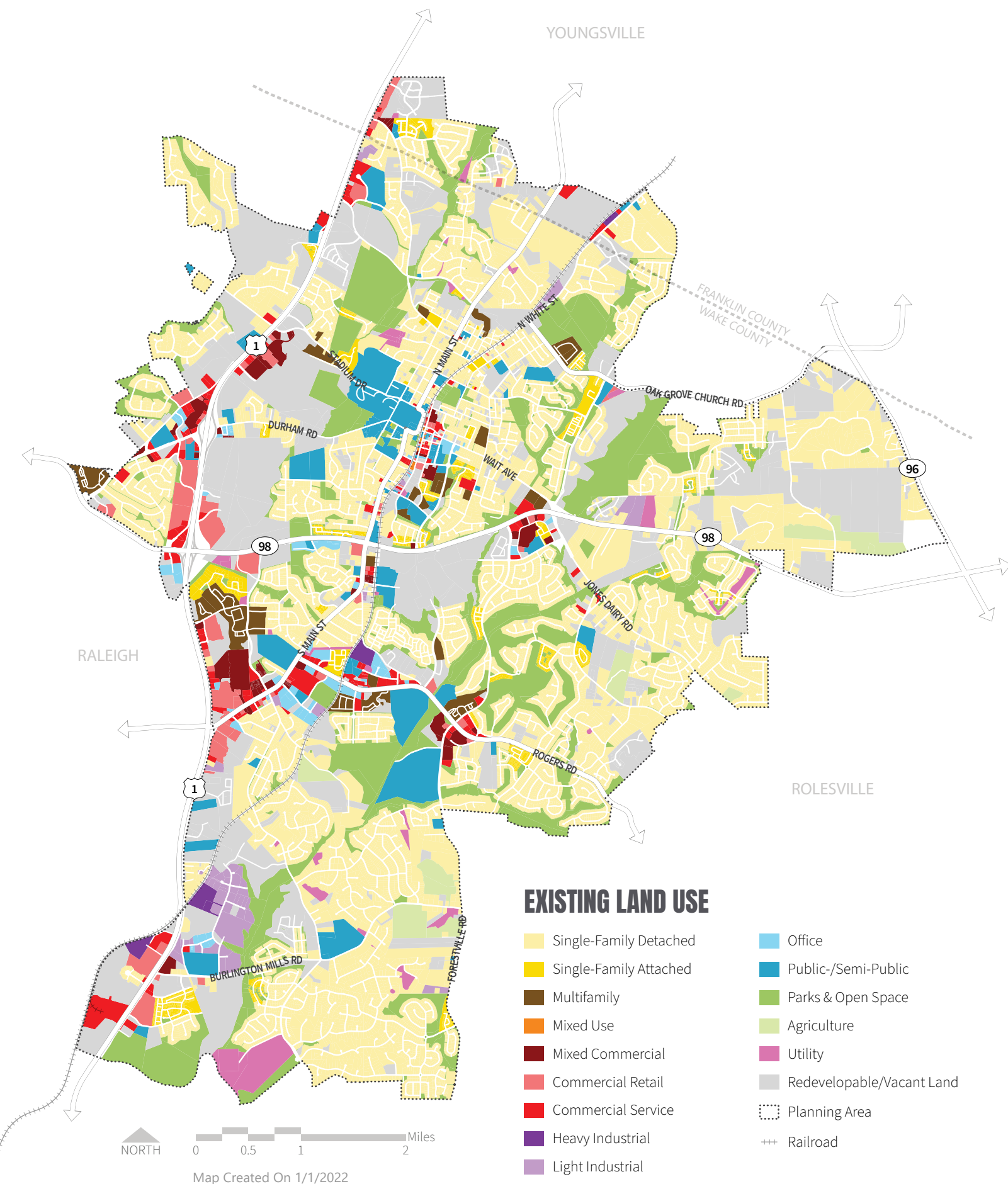
Includes land that is actively being used to produce crops, livestock, and other farming-related activities.

Utility

Includes utility infrastructure, such as electrical substations, power line rights-of-way, and water treatment facilities. Utility uses are dispersed throughout the Town to support existing development.

Redevelopable/Vacant Land

This category includes areas that have not been developed for any use and are not designated open space. This includes land that has yet to be cleared for development, as well as land that has been cleared and primed for development, potentially with connections to one or multiple utilities, including water, sewer, electric, gas, and telecommunications. This category also includes land that contains vacated existing structures that can be reasonably considered available for redevelopment.



CURRENT ZONING

Development controls such as the Town's municipal zoning code and sign ordinance provide the legal framework to regulate the built environment. Wake Forest's zoning regulations are outlined in its Unified Development Ordinance (UDO), which dictates land use and guides development within the Town. Note: The following section and Current Zoning Map only identify zoning districts within the Town's existing Unified Development Ordinance (UDO). Each property within the Town's jurisdiction is designated as one of the following 16 zoning districts:

Open Space (OS)

This district is intended to preserve and protect environmentally sensitive lands, such as floodways or wetlands, and properties that are already under public ownership and/or otherwise restricted for use for passive or active recreational use.

Rural Holding District (RD)

This district includes areas where the principal uses of the land are restricted due to lack of available utilities, unsuitable soil types, or steep slopes.

General Residential (GR3, GR5, GR10)

These districts are established to maintain previously developed suburban residential subdivisions for their existing or approved low-to medium-density single-family dwellings and related recreational, religious, and educational facilities. Intended to act as a transitional zoning district between rural development in the County and the urban development of the Town, these districts discourage any use which would be detrimental to the predominately residential nature of the areas in the district.

Urban Residential (UR)

This district is intended to establish residential districts in which a variety of housing types are permitted. Permitted housing in this district includes single-family and duplex residences, small apartment buildings, and townhouses.

Residential Mixed Use (RMX)

This district is intended to provide a mix of small residences and multifamily structures in relatively high density neighborhoods within walking or biking distance from mixed use centers. This district also allows limited commercial uses in pedestrian-scaled, residential-style structures.

Neighborhood Mixed Use (NMX)

This district is intended to create pedestrian-scaled, mixed use areas that cater to the everyday needs of nearby neighborhoods, stressing accessibility by automobiles, bicycles, and pedestrians.

Urban Mixed Use (UMX)

This district is intended to promote an active, pedestrian-friendly area of community-scale commercial, residential, office, and civic uses in both vertically mixed use, as well as free-standing buildings. This district encourages retail at street level, with residential uses in rear or upper stories.

Renaissance Area Historic Core (RA-HC)

This district is intended to support the sensitive continuation of the "Main Street" environment of S White Street and its secondary streets. The ground floor of buildings on S White Street should feature active storefronts, such as retail or restaurants, with office and residential located on second stories. Side streets east of White Street may have a greater variety of ground-floor uses.

Neighborhood Business (NB)

This district is intended to provide areas for lower intensity retail trade and services such as cafes, childcare facilities, and small scale grocery stores that reduce trips to major commercial areas for residents. Such districts are generally located near residential areas and cater to the everyday needs of nearby residential neighborhoods, stressing accessibility by automobiles, bicycles, and pedestrians.

Highway Business (HB)

This district supports retail, service, and office uses. It is intended to accommodate the predominately auto-oriented pattern of existing development while encouraging the creation of new pedestrian-friendly, mixed use areas that avoid strip commercial development and establish more resilient land development patterns. This district is generally located on major thoroughfares.

Light Industrial (LI)

This district is intended to accommodate externally benign industrial and office uses that pose minimal nuisance to adjacent residential or mixed use areas.

Heavy Industrial (HI)

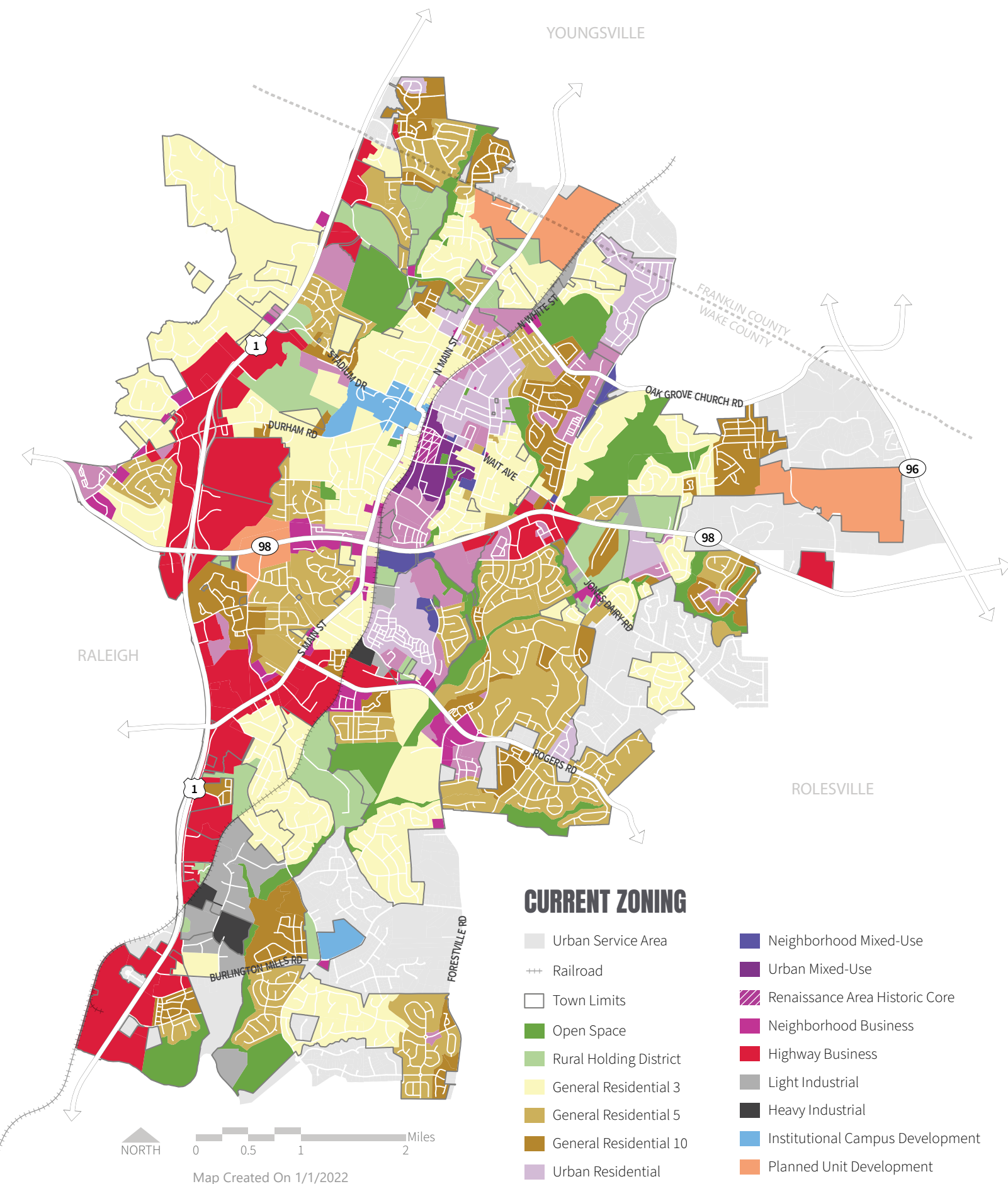
This district is intended to accommodate those industrial, manufacturing, or large-scale utility operations that are known to pose levels of noise, vibration, odor, or truck traffic that are considered nuisances to surrounding development.

Institutional Campus Development (ICD)

This district is intended to allow for the continued and future use, expansion, and new development of academic and religious campuses and of governmental and health facilities, where the campus or facility has a total development size greater than 10 acres. The goal is to promote the many varied uses associated with such institutions while maintaining the overall design integrity of the campus setting and minimizing any adverse impacts on the neighboring residential and historic areas. In the attempt to meet this goal numerous requirements are included, such as buffers, landscaping, outdoor lighting, parking, signage, building height, and setbacks.

Planned Unit Development (PUD)

This district is intended to promote a compatible mix of uses to instigate an integrated and sustainable development consistent with the Town's unique character. This district encourages design flexibility; multi-modal connectivity between uses; sensitivity to natural resources and environmental features; and the efficient provisions of infrastructure, utilities, and adequate public facilities.



OVERLAY DISTRICTS

An overlay district is a zoning tool that applies an additional set of regulations on top of an underlying zoning district(s) to establish stricter standards for development. The following overlay districts aim to manage certain environmentally sensitive or visually important areas, establishing design, use, or other standards in addition to the requirements of the underlying base district(s).

Historic District & Landmarks Overlay (HL-O)

This district is intended to provide additional protections and controls to preserve the special character of properties and structures located within locally designated Historic Districts as well as to individual Historic Landmarks. Historic Districts include:

- Wake Forest Local Historic District and Local Historic Landmarks
- Wake Forest National Register Historic District
- Glen Royall Mill Village
- Downtown Wake Forest National Register Historic District

For more information on National Register Historic Districts, see page 71.

Glen Royall Mill Village Character Preservation Overlay (MVCP-O)

This district is intended to preserve and protect the specific historic and unique neighborhood character found within the Glen Royall Mill Village National Register Historic District.

Special Highway Overlay (SH1-O and SH2-O)

This district is intended to protect and preserve the natural scenic beauty along major access corridors located in the Town's zoning jurisdiction. It is also intended to protect the carrying capacity of these major thoroughfares by reducing the hazards arising from unnecessary points of ingress and egress and cluttered roadside development. The overlay district is also designed to reduce the costs of future highway expansions by protecting the associated highway corridors at the time of development.

Required Shopfront (SF)

This district is intended to implement vibrant, pedestrian-friendly areas in Form-Based Districts, or districts in which development is regulated primarily based on physical form rather than land use. It ensures that the ground floors of buildings in designated blocks are designed using either shopfront and awning, gallery, or arcade private frontage.

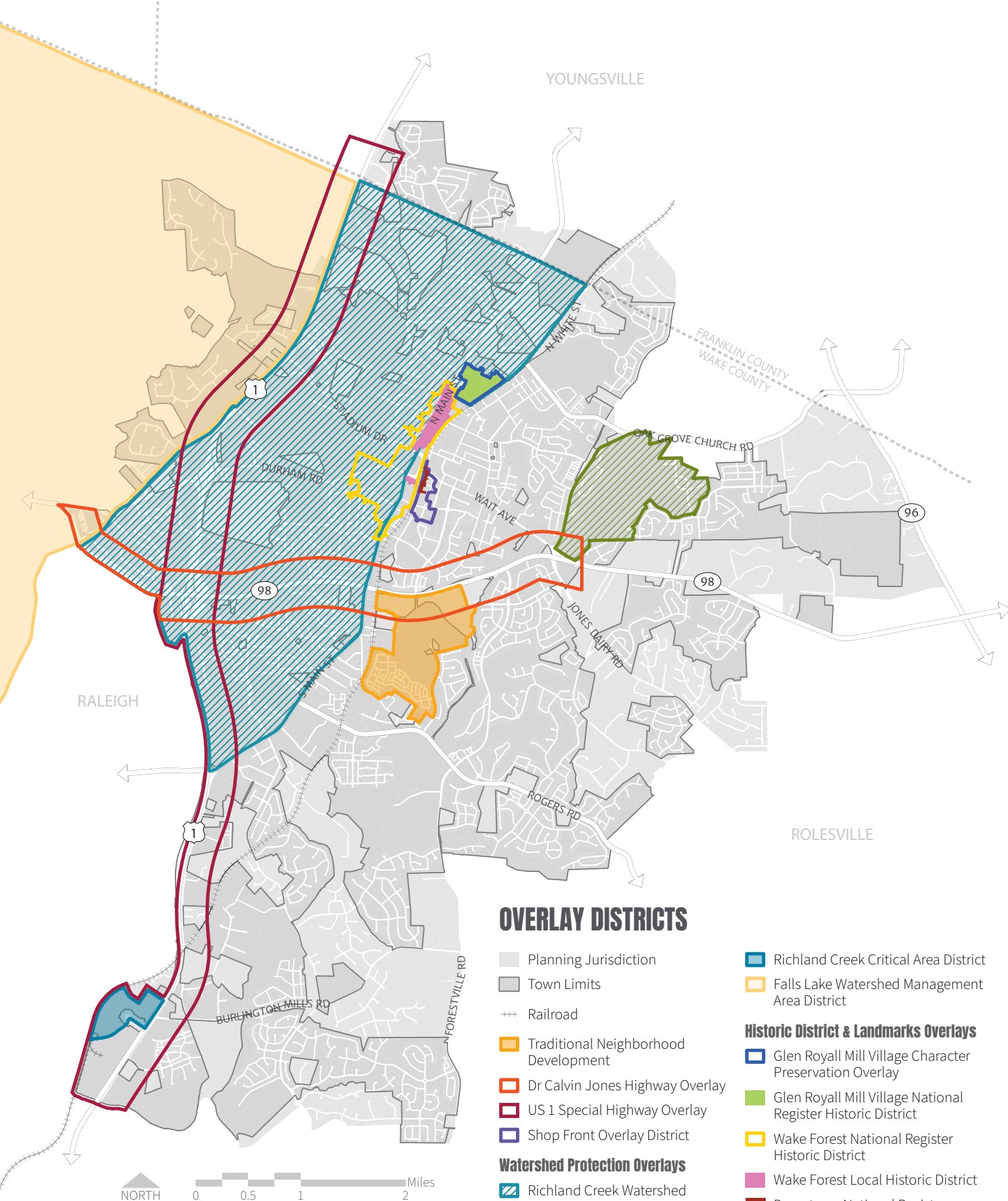
Traditional Neighborhood Development (TND)

This district is intended to allow the development of fully integrated, mixed use, pedestrian-oriented neighborhoods to minimize traffic congestion, suburban sprawl, infrastructure costs and environmental degradation. This district is a planned development district as it is created through the combination of other form-based districts as subdistricts under the umbrella of the TND.

Watershed Protection Overlays

These districts are intended to preserve water quality in the Town's water supply watersheds to provide safe drinking water. They establish regulations that ensure the availability of public water supplies at an acceptable level of water quality for present and future residents, and include the following overlays:

- Falls Lake Watershed Protection Overlay (Falls Lake-Critical Area & Falls Lake-Watershed Management Area)
- Richland Creek Watershed Protection Overlay (Richland Creek-Critical Area & Richland Creek-Watershed Management Area)
- Smith Creek Watershed Protection Overlay (Smith Creek-Critical Area & Smith Creek Watershed Management Area)
- Little River Watershed Protection Overlay (Little River-Watershed Management Area)



DEMOGRAPHIC SNAPSHOT

The Demographic Snapshot assesses the existing demographic characteristics of the Town of Wake Forest. The snapshot helped guide the planning process to ensure the Community Plan reflects accurate demographic data and addresses existing trends, issues, and opportunities.

POPULATION

Wake Forest has experienced significant growth since the 1990s, with its population increasing by over seven times its size.

The current population of the Town of Wake Forest is 47,601 people. Between 1990 and 2020, the Town experienced tremendous growth by 41,832 new residents, a 725% population change. This is more than four times greater than Wake County's population growth and almost 13 times greater than North Carolina's growth within the same period. The Town's significant population increase is reflective of the major growth occurring in municipalities across the Research Triangle. The Town's growth is most likely associated with the availability and lower cost of land and housing compared to the City of Raleigh. Over the next two decades, Wake Forest's population is projected to increase by 150% to 118,912 people in 2040. This rate could increase, however, with the construction of the proposed S-Line stations that would improve transit access to and from the Town (see page 75 for more information).

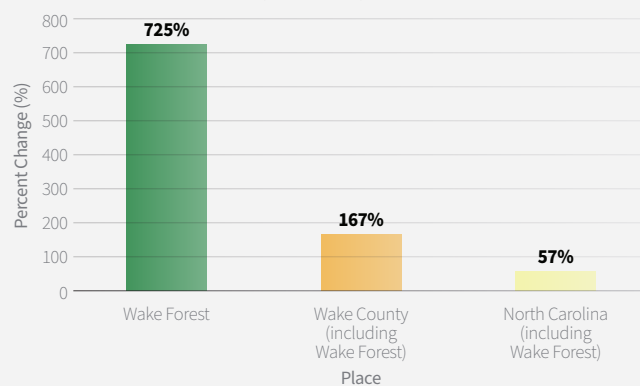
725%

Increase in population between 1990 and 2020

Source: U.S. Census; American Community Survey; Houseal Lavigne Associates

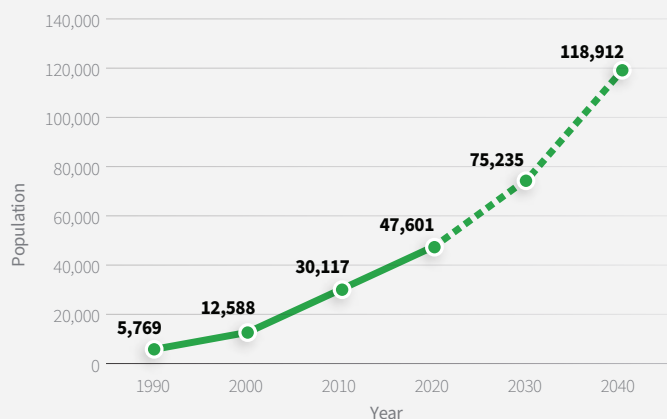
Population Change

(1990-2020)



Population Projection

Wake Forest (1990-2040)

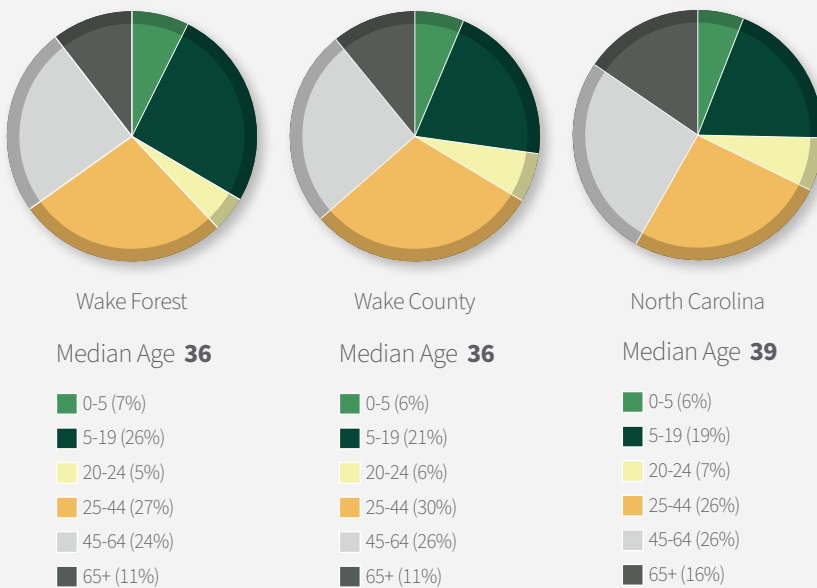


AGE

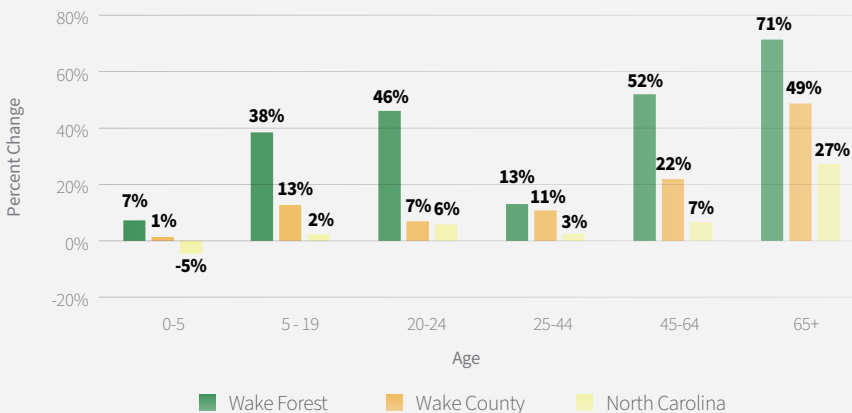
Wake Forest's senior population is growing in line with county, state, and national trends.

The Wake Forest community is growing older. Based on U.S. Census Bureau data, the Town experienced a substantial 71% increase in seniors (people aged 65 years and older) over the past decade, and a 52% increase in the 45 to 65 age group. Wake County and North Carolina both show a similar pattern, though less significant. All three geographies align with national trends driven by the large, aging baby boomer generation, underscoring the growing need for senior housing, amenities, and services.

Age Distribution (2018)



Age Distribution Change (2010-2018)



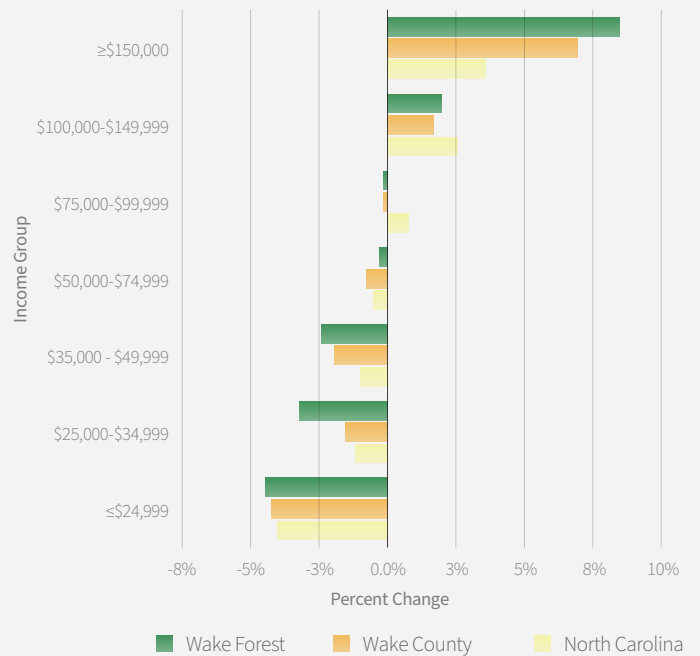
INCOME

Like Wake County and North Carolina, Wake Forest's higher-income households have grown over the last eight years while lower-income households have decreased.

Wake Forest's largest household income group is the \$150,000 and over group, followed by the \$100,000 to \$149,999 group. Wake Forest, Wake County, and North Carolina each show similar trends, highlighting a higher-income population that is growing, and simultaneously, a shrinking lower-income population. This could indicate an increase in higher paying jobs in the area for existing workers and/or new residents moving in with higher incomes.

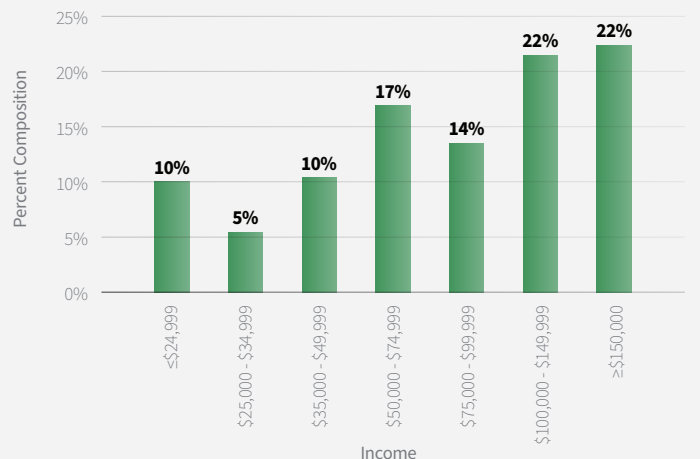
Change in Household Income

Percent Composition (2010-2018)



Household Income

Wake Forest (2018)

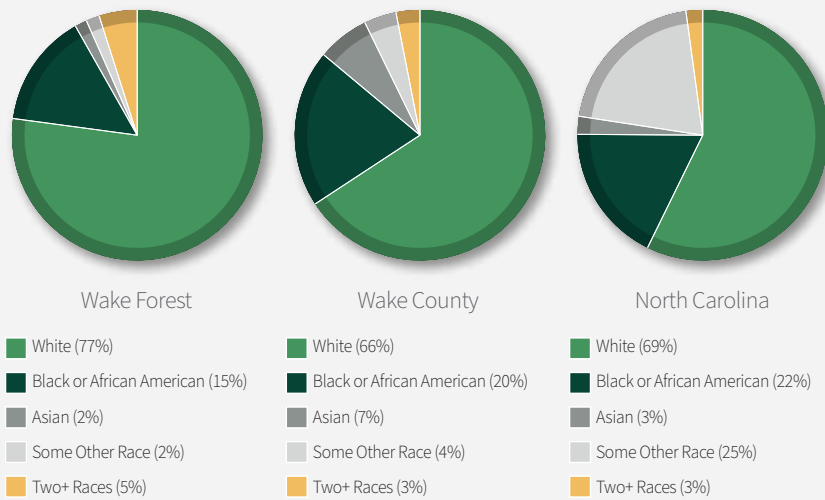


RACE & ETHNICITY

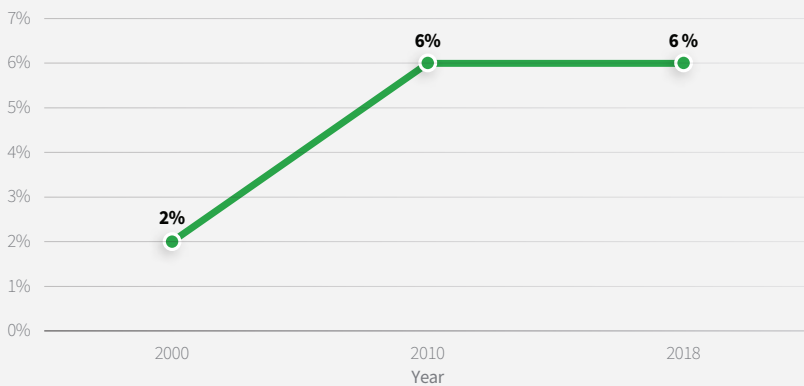
Wake Forest is less diverse than Wake County and North Carolina.

According to the U.S. Census Bureau, most of Wake Forest identifies as White (77%) and the second largest racial group is Black or African American (15%). The Town is less diverse than Wake County (66% White and 20% Black or African American) and North Carolina (69% White and 22% Black or African American). Wake Forest also has a lower proportion of people who identify as Hispanic, an ethnicity which can be made up of any race, at 6% compared to Wake County at 10% and North Carolina at 9%. The Hispanic population has increased as a percentage of the total in Wake Forest, albeit at a minimal rate.

Race Distribution
(2018)



Change in Hispanic Population
Wake Forest (2000-2018)

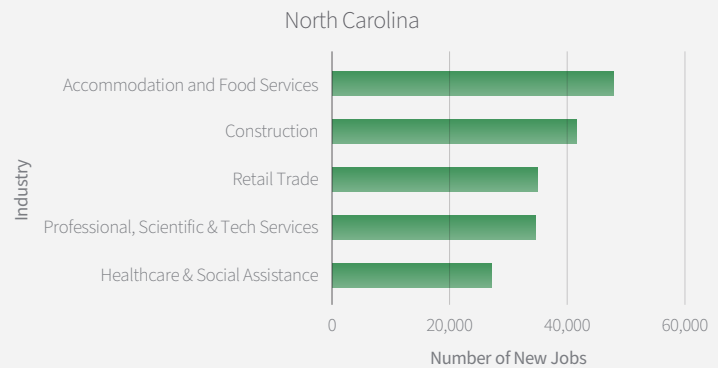
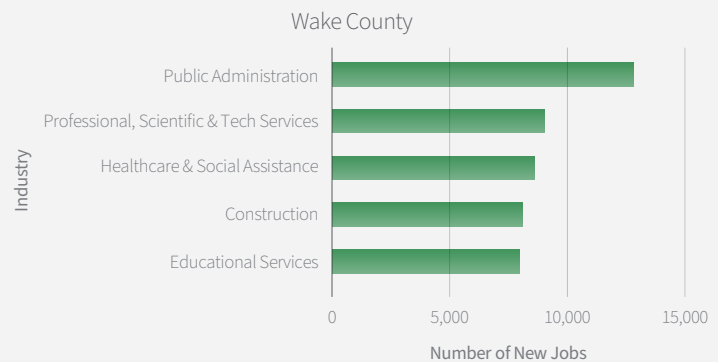
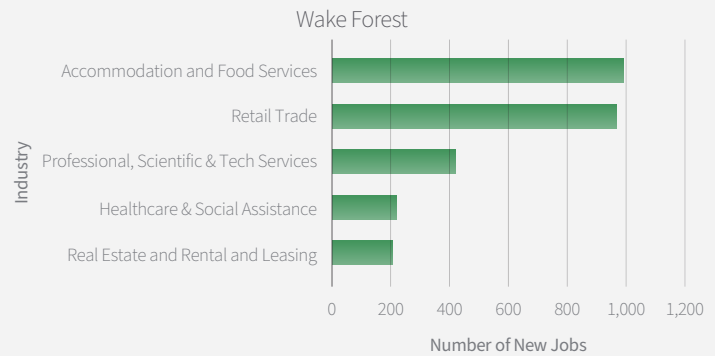


EMPLOYMENT

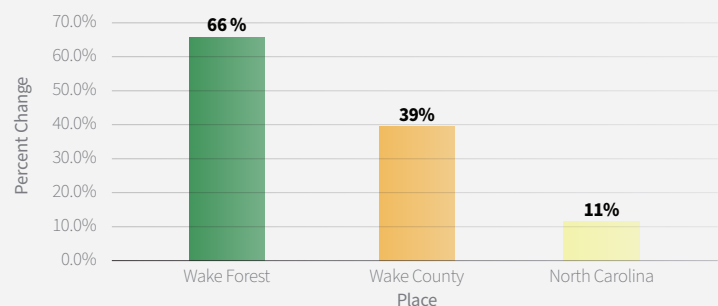
Wake Forest's corporate community and expanding business environment has created a variety of job opportunities over the past decade.

The Town has experienced a 66% increase in total primary jobs between 2013 and 2017, reflecting the fast-paced economic development occurring throughout the Triangle Region. The Town's largest industry is Retail Trade, which makes up 23% of its employment base, followed by Accommodation and Food Services (18%) and Professional, Scientific, and Technical Services (11%). While Retail Trade currently provides the most jobs within the Town, Accommodation and Food Services experienced the largest growth between 2013 and 2017 (993 new jobs), followed again by Retail Trade (968 new jobs) and Professional, Scientific, and Technical Services (422 new jobs). Professional, Scientific, and Technical Services and Healthcare and Social Assistance fall within the Town's, County's, and State's top five growing industries. This corresponds with the significant growth in the research, technology, and medical-related businesses in the larger region, including in Research Triangle Park (RTP).

Job Growth (2013-2017)



Change in Total Primary Jobs Wake Forest (2007-2017)



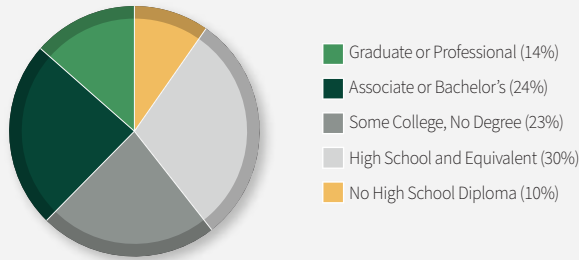
EDUCATION

Wake Forest's population is slightly more educated than the State's but trails the County's.

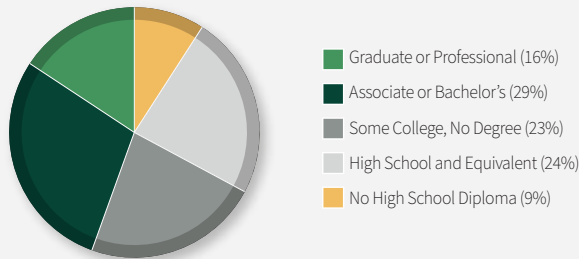
Between North Carolina, Wake County, and Wake Forest, the County has the highest educational attainment levels, though there is not a substantial disparity in between the three geographies. This is likely due to Raleigh's urban nature and universities located in the County that provide greater access to higher education institutions. The Town has the second highest rate of graduate and professional degrees (14%) and second lowest rate of residents aged 25 or older without a high school diploma (10%).

Educational Attainment (2018)

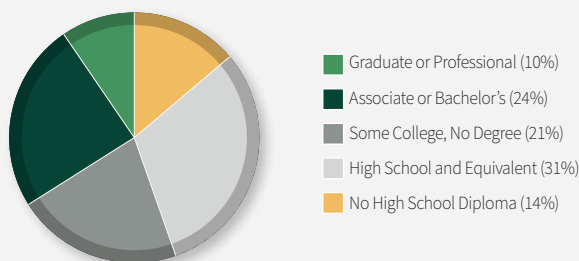
Wake Forest



Wake County



North Carolina

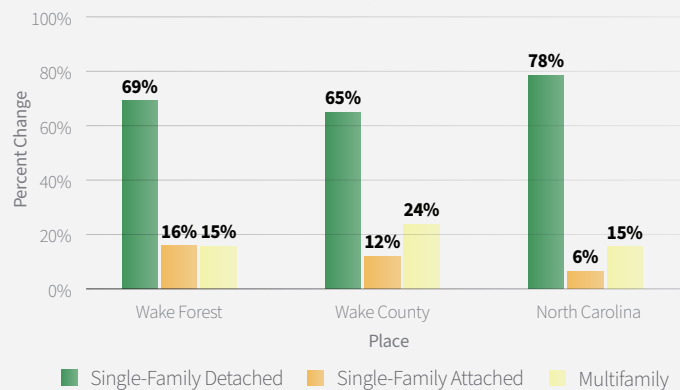


HOUSING TYPE & TENURE

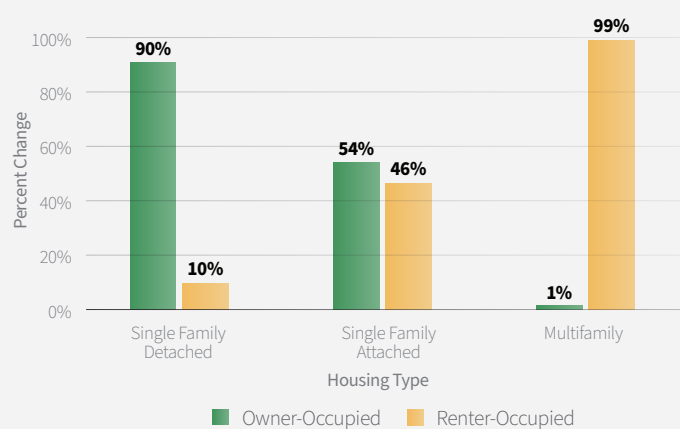
Wake Forest's housing stock is mostly owner-occupied single-family homes.

Single-family homes are the most common housing type in the Town at 69%, which is a greater proportion than the County (65%), but less than the State (78%). Single-family attached and multifamily housing make lower proportions at 16% and 15%, respectively. Homeownership rates among the housing types in Wake Forest are 90% for single-family detached, 54% for single-family attached, and 1% for multifamily. Since most of the Town's single-family housing is owner-occupied, multifamily housing will continue to be a critical rental option.

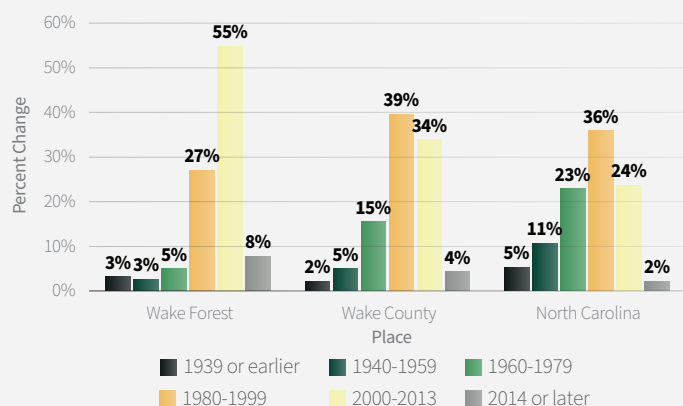
Housing by Type
(2018)



Housing by Type & Tenure
Wake Forest (2018)

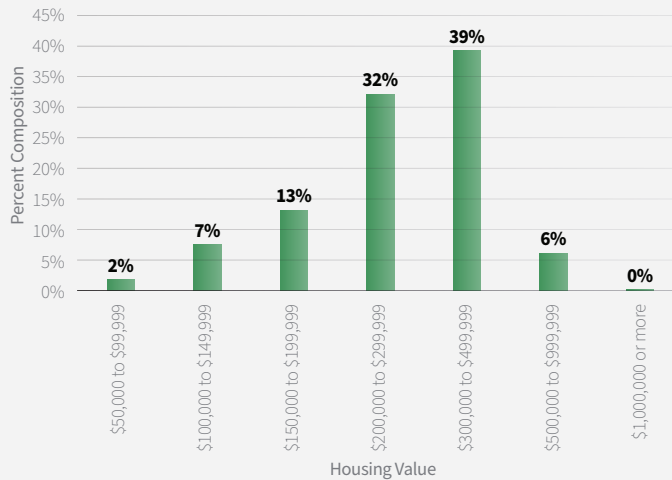


Housing Age



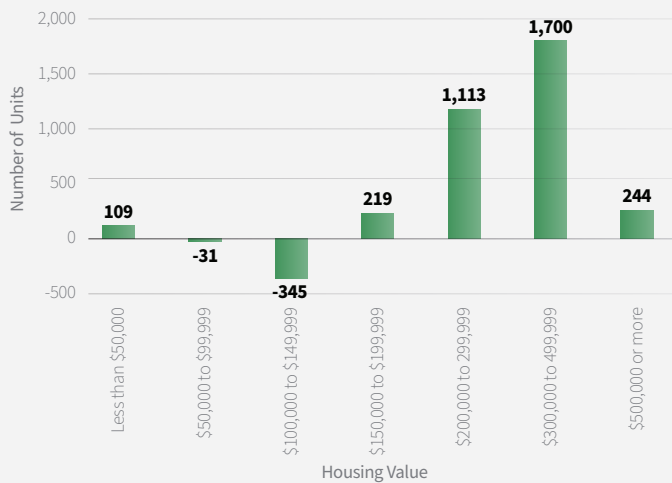
Housing Value

Wake Forest (2018)



Change in Housing Units by Value

Wake Forest (2010-2018)



HOUSING AGE & VALUE

Most of Wake Forest's housing was built in the last 20 years and there is a lack of new middle to lower income housing.

The majority of homes in Wake Forest were built between 1980 and 2013 (82%). The Town's rate of new housing construction was particularly high between 2010 and 2013 (55% of the housing stock)—more than double the County's. Wake Forest's homes are mostly valued between \$200,000 and \$499,999. Less than 1% of homes are valued at over \$1,000,000, and only about 2% of homes are valued under \$50,000, which shows the lack of housing on the extreme ends of the price spectrum. From 2010 to 2018, homes valued at \$300,000 to \$499,999 increased the most at 1,700 new units, followed by the \$200,000 to \$299,999 range with 1,113 new units. Homes valued between \$50,000 and \$150,000 experienced a decline or a small increase, highlighting the lower number of new housing options for middle to lower income residents.

PAST PLANS & STUDIES

It is important that the Community Plan respects relevant past planning efforts that have shaped the Town into what it is today. The review of the Town's past plans and studies ensures existing community policies and goals are carried forward within the Plan where relevant. The following section contains an overview of some of the Town's local past plans and studies. The overview is not a comprehensive list of the Town's past plans and studies as there may be other important plans relevant to land use planning.

Community Plan (2009)

The 2009 Community Plan establishes direction for community planning and growth management in Wake Forest for the following 10 to 15 years. The Plan addresses topics like residential, commercial, and industrial development; parks, open space, and greenways; transportation; quality of life; and Town appearance. The Plan's goals include maintaining the community's small-town character, revitalizing the Downtown, improving its multimodal transportation system, and enhancing access to parks and recreation. The Plan also addresses strategies for supporting affordable and quality residential neighborhoods, balanced and compatible commercial development, and local businesses and employment opportunities.

Further, sustainable growth is an important component of the Town's vision in the 2009 Community Plan, with an emphasis on discouraging leapfrog development patterns, single purpose subdivisions, and neighborhoods isolated from services and jobs. A Growth Strategy Map is included, which identifies future growth areas to better plan for the provision of municipal services, preservation of open space, and the density and character of new development.

This new Community Plan will serve as an official update to the 2009 Plan.

Comprehensive Transportation Plan (2019)

The 2019 Comprehensive Transportation Plan (CTP) is a long-range plan that provides recommendations to address the Town's multimodal transportation needs for the next 25 to 30 years. This includes improvements to highways and streets, pedestrian and bicycle infrastructure, and transit that will steer the Town towards providing a safe, efficient, flexible, innovative, and inclusive transportation system with a multitude of options for residents and visitors. Recommendations within the Plan include specific locations for new multi-use paths, bicycle lanes and sharrows, rail service, and a "reverse route" of the existing Wake Forest Loop bus service.

This Community Plan update takes into consideration recommendations of the CTP where applicable to help guide land use and development that is supportive of the Town's goals for improved multimodal accessibility.

Renaissance Plan (2017)

The 2017 Renaissance Plan establishes recommendations for the revitalization of Wake Forest's historic Downtown. The Plan aims to create a vibrant core for the community that provides a place to live, work, and play for both locals and visitors. It also identifies key new development and redevelopment opportunities for mixed use, housing, retail, office, and dining. Mobility is a major theme carried throughout the Plan, with recommendations for enhancing the pedestrian environment, bikeability, and access to transit from within the Downtown. Further, the Plan sets the framework for urban design enhancements that promote a high quality of life, such as appropriate building height standards, continuous frontages, spatial enclosure, and gateway improvements.

This Community Plan update builds on the Renaissance Plan, incorporating applicable recommendations while re-examining the future land uses in the Downtown (see the Downtown Area Plan on page 58).

Parks, Recreation & Cultural Resources Master Plan (2015)

The 2015 Parks, Recreation, and Cultural Resources Master Plan guides the Town in meeting the needs of current and future residents by enhancing and expanding on the community's unique parks, recreation, and cultural assets. The Plan includes a facility inventory, GRASP (Geo-Referenced Amenities Standards Process) Level of Service Analysis, needs assessment, and operational and marketing analysis, that inform recommendations on how to enhance existing facilities while pursuing opportunities for new facilities and improvements. Issues identified include the need for better circulation systems within parks, increased connectivity to the trail system, enhanced open space integration into parks, and better provision of park facilities west of Capital Boulevard and south of Dr. Calvin Jones Highway (Hwy 98).

This Community Plan update supports the Master Plan and provides high-level recommendations for expanded access to parks, recreation, and cultural resources.

Historic Preservation Plan (2012)

The 2012 Wake Forest Historic Preservation Plan outlines the Town's current preservation funding and oversight mechanisms, historic preservation-related activities and projects, and lists of the Town's historic districts and landmarks. The plan also provides a set of policies that provide the framework for the Town's approach to historic preservation. A summary of a community workshop that was hosted by the Wake Forest Historic Preservation Commission is included in the appendix.

The Community Plan promotes coordination with the Historic Preservation Plan and encourages new development and redevelopment within historically significant areas to complement the existing historic character.

Northeast Community Plan (2021)

The Northeast Community Plan recommends policies and actions to address the current and future needs of the Northeast Community in Wake Forest. The Plan aims to help preserve the history, diversity, and affordability of the area while addressing issues of growth, economic health, public infrastructure, and preservation. The update to the Northeast Neighborhood Plan was underway during the development of the updated Community Plan, and the two project teams met multiple times throughout the planning process to ensure alignment of the Plans.

While the Community Plan does not provide recommendations for the Northeast Community Plan, it ensures surrounding uses are supportive of the neighborhood's vision and goals.

COMMUNITY OUTREACH

Community engagement was an essential component of developing the new Community Plan, supporting a bottom-up approach to the development of the Town's vision, goals, and objectives. Outreach gave residents, local business community, Town staff, and community stakeholders a chance to be heard and an opportunity to take part in shaping the future of the Town. Outreach events were promoted through the project page on the Town's website. Online surveys and an online mapping tool were available throughout the community outreach phase of the planning process.

Community Advisory Panel

A Community Advisory Panel was formed to serve as a sounding board for the Community Plan Update and Future Land Use Map. The Panel consisted of 12 community stakeholders, most of which were residents, with a diverse range of local expertise regarding Wake Forest. The group met four times to provide valuable feedback to Town Staff and the Board of Commissioners during the planning process on key issues, overall policy direction, Plan content, and recommendations as they were developed.

Board of Commissioners & Planning Board Work Sessions

Four Work Sessions were conducted with the Board of Commissioners and Planning Board to discuss the overall direction and policy issues facing the community. The Work Sessions gathered ideas and feedback from Town officials to ensure that the Plan accurately captures the shared sentiments of the leaders of the community.

Business Focus Group

On October 7, 2020, the Town of Wake Forest and the project consultant team hosted a virtual Business Focus Group with seven participants targeted specifically to property owners, business owners, and developers. The purpose of the workshop was to gain feedback from business community members who have a unique insight on important factors facing the Town and its business climate.

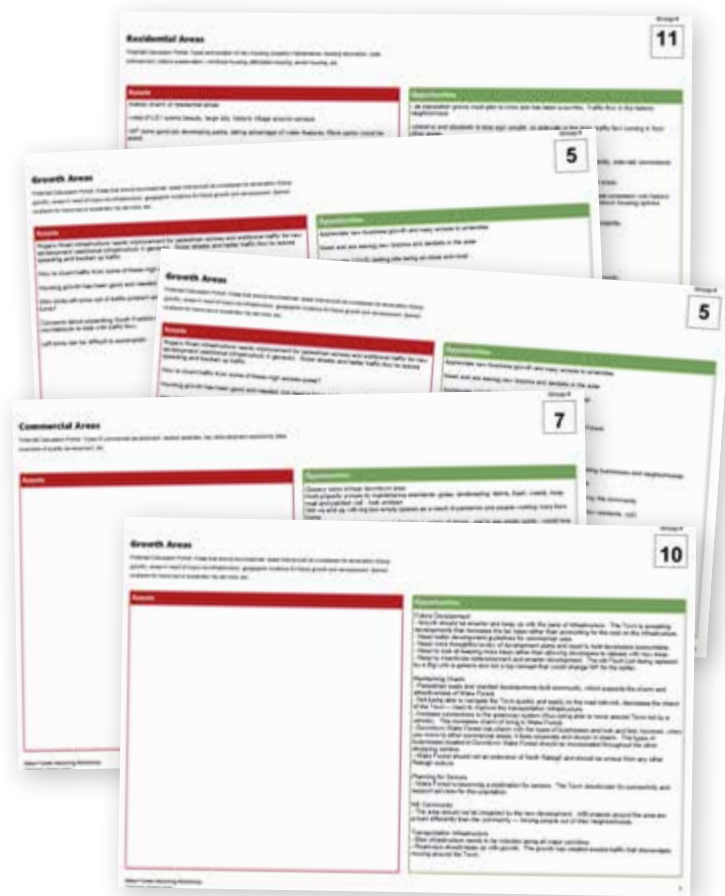
Key Person Interviews

Key person interviews were conducted in October 2020 with 21 people to gain first-hand insight into the community from a diverse array of specialized perspectives. The project team worked with Town staff to identify which individuals and groups to be interviewed. Interviewees included a variety of stakeholders, such as representatives of the development community, business owners and operators, adjacent communities, and other institutional and civic groups.



POST CARDS

Post cards were mailed to all addresses (residential and commercial) within the Town limits, ETJ, urban service areas, and areas within annexation agreement boundaries. The post cards informed community members about the Community Plan and promoted the Community Survey, Visioning Workshops, and Open House.



Our Town Newsletter

A cover story on the Community Plan was included in the July/August edition of Wake Forest's Our Town newsletter, and additional articles were included in the September/October and November/December editions (mailed to every home in the 27587 zip code).

Open House Series

On February 1, 2022, the Town of Wake Forest and Houseal Lavigne's project consultant team hosted two in-person Open House events at the Flaherty Park Community Center. The events provided residents, business owners, and stakeholders the opportunity to share their thoughts and opinions on Wake Forest's long-term vision, vitality, and sustainability as captured in the draft Community Plan and Future Land Use Map. Each event was two hours long in an informal, open house-style format where attendees could review Plan elements, discuss key issues and priorities, and provide comments on Plan content. A total of 245 community members attended the Open House series.

IMPACTS OF COVID-19

The planning process took place during the COVID-19 pandemic, which prompted adjustments to the project timeline and outreach strategy. The project team was able to pivot and effectively engage residents and stakeholders by leveraging online and social media platforms and providing virtual meetings, workshops, and tools aimed at allowing people to actively participate in the planning process from home. Throughout the project, the public was able to see presentations, ask questions, provide input, and remain actively and effectively engaged.

VIRTUAL VISIONING WORKSHOPS (THREE)

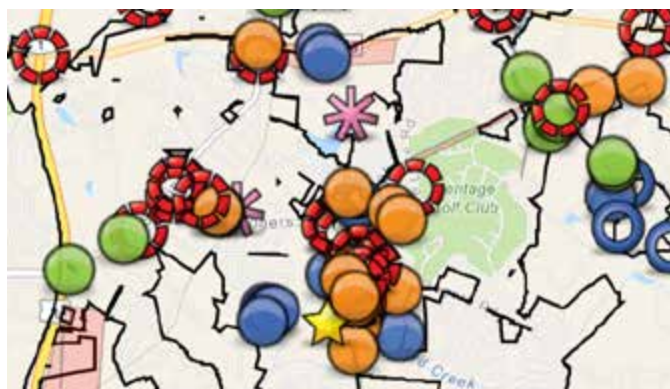
On April 13, 17, and 22 of 2021, the Town of Wake Forest and Houseal Lavigne's project consultant team hosted three virtual Visioning Workshops. A total of 225 people attended the workshop series, providing feedback on key issues and opportunities in the Town to help shape the vision and goals of the Plan. Attendees participated in a live polling activity and breakout rooms for group discussions, where Town staff recorded feedback on virtual workshop packets. The feedback received was synthesized to form the vision and goals of the Plan.



map.social

Using map.social, an online mapping tool, over 117 points of interest were mapped by community members through the planning process, which identified locations of existing assets, issues, and opportunities within Wake Forest. Participants created personalized maps that pinpointed the following elements:

- Community assets
- Public safety concerns
- Development priority sites
- Problematic intersections
- Undesirable uses
- Key transit destinations
- Desired uses/developments
- Poor appearance areas
- Other (for elements not included in the categories above)



Online Surveys

The following online surveys were available through the project website to gain input from a wide variety of residents, business community members, property owners, and other community stakeholders:

- **Community Survey** – available to all community members to gain input on issues and opportunities regarding residential areas, commercial and industrial uses, community facilities, parks and recreation, and image and identity within Wake Forest. (1,316 respondents)
- **Vision and Goals Survey** – available during the visioning phase of the planning process to receive input on desirable types of land use and development and preliminary vision and goal topics. (229 respondents)





Online Promotion

The following online promotion was conducted to spread the word on the Community Plan and ways to get involved:

o Promotional Video

A video was created to promote the Community Plan and encourage community members to get involved. This video was viewed over 2,000 times.

o News Releases

Four news releases were distributed to promote the April 13, 17, and 22, 2021 Visioning Workshops. News releases for the Open House were sent to all local news outlets and posted on the Town website on January 12 and 31, 2022.

o Engage Wake Forest

Information about the Community Plan was shared on the engagement platform, including dates of key events, Plan materials and draft documents, and FAQs about the planning process. The Community Plan project page received 1,000 visits to and 29 responses to posted questions.

o Town-to-Resident Text & Email Notification System

A email and text message promoting the Open House was sent via Blackboard Connect (16,742 recipients).

o Town of Wake Forest App - About 21,000 devices

Reminders about the Community Survey were sent on October 21 and December 16, 2020, and reminders about the Visioning Workshop were sent on April 8 and 16, 2021. Open House push notification reminders were sent on the morning of February 1, 2022.

o Nextdoor - About 18,000 members

Reminders about the Community Plan process and the Community Survey were posted four times between September 18 and December 15, 2020 (seen by over 5,000 Nextdoor members). Six reminders were posted about the Visioning Workshops (seen by over 5,000 Nextdoor members). Open House reminders were posted on January 12, 25, and 31, 2022.

o E-Alert - About 9,000 email subscribers

An email with a link to the Community Survey was sent on September 28, 2020. An email notice about the availability of draft Community Plan and the Open House was sent on January 12, 2022.

o Facebook - About 23,400 followers

Between September 28, 2020 and January 1, 2021 reminders were posted on the following Facebook pages: Town of Wake Forest, Wake Forest Community Info, Advancing Wake Forest, Heritage Wake Forest, and Real Wake Forest Info (seen by over 26,000 people). Between March and April, 2021, 10 reminders were posted on Facebook promoting the Visioning Workshops (seen by over 5,000 people), and on January 10, 12, 18, 25, 27, and 31 and February 1 of 2022 for the Open House.

o What's Up in Wake Forest - About 12,000 subscribers

Reminders about the Community Plan and the survey were included in each weekly edition from September 25 through December 21, 2020. Reminders about the Visioning Workshops were included in each weekly addition from March 26 to April 16, 2021, and for the Open House on January 14, 21, and 28, 2022.

o Twitter - About 5,000 followers

Tweets were posted on January 10, 12, 18, 25, 27, and 31, and February 1 of 2022 promoting the Open House.

o Instagram - About 7,100 followers

Eight reminders were posted promoting the Open House, including pictures on the day of the event.

o LinkedIn - About 1,100 followers

Eight reminders were posted promoting the Open House.





Vision & Goals

Driven by community and stakeholder input, this chapter details the Community Plan’s vision and goals, which provide the framework for planning recommendations, policies, projects, and actions expressed within the Wake Forest Community Plan.

The Vision Statement is an aspirational narrative that paints a picture of what the Town can achieve following the adoption of the Community Plan. The narrative depicts the community’s collective desires and serves as the foundation for the Plan’s goals, recommendations, and actions.

The Goals describe desired results towards which planning efforts should be directed. They are broad and long-range. They represent an ambition to be sought and require the culmination of many smaller actions to be fully achieved. The Goals are listed in alphabetical order and each are of equal importance.

VISION STATEMENT

The Town of Wake Forest will continue to prosper as a highly desirable community that preserves its small-town charm while fostering new growth opportunities. Smart, sustainable growth strategies will guide future development, with an enhanced focus on preserving open space, maintaining a lush tree canopy, and ensuring sufficient infrastructure is in place. The Town will support a balanced mix of uses where residents can live comfortably near employment areas, easily access job opportunities, and enjoy a variety of local shops, restaurants, and recreation amenities catering to all ages. Both new and existing neighborhoods will support a diverse range of housing choices and receive an equal share of public investment. Residents will reach regional and community destinations safely and easily via a robust public transit, pedestrian, and bike network.

Wake Forest's economy will flourish, showcasing an entrepreneurial spirit that welcomes innovation, creativity, and collaboration. Residents will have access to a variety of local shops and restaurants, while flexible office spaces and employment centers will generate jobs and strengthen the Town's tax base. Downtown will continue to expand while maintaining its historic character, serving as the hub of civic activity, community events, and entertainment. Future development will be high quality and support a vibrant mix of uses exhibiting the unique character that sets Wake Forest apart from other communities within the Research Triangle.

GOALS



Balance the Mix of Uses

Support a balanced mix of uses that create attractive residential areas, well-paying employment opportunities, and an abundance of recreation options.



Encourage Growth & Activity in Downtown

Continue efforts to revitalize and extend Downtown into a lively, pedestrian-friendly center of civic activity that provides places to eat, shop, and enjoy outdoor public gathering spaces.



Expand & Maintain Wake Forest's Green Spaces

Enhance, expand, and maintain the Town's open space and tree canopy as growth occurs, and balance the preservation of the urban tree canopy with personal property rights.



Establish Safe & Connected Public Transit Options

Establish a well-connected public transit system that improves access to regional and local destinations while supporting transit-oriented development.



Maintain the Historic, Small-Town Charm

Reinvest in established neighborhoods, preserve historic assets, and ensure the quality design of future development to maintain Wake Forest's unique charm and desirability as a place to live.





Provide Diverse Housing Opportunities

Ensure Wake Forest provides a range of housing choices for residents of all income levels, stages of life, and abilities.



Support a Pedestrian-/Bicycle-Friendly Community

Establish a highly-connected network for active modes of transportation to ensure residents can safely and conveniently travel between their neighborhoods, shopping areas, and other community destinations without a car.



Support Strategic Growth

Prioritize infill development and ensure the necessary infrastructure is in place to support future growth.



Support Unique, Thriving Businesses

Support small businesses, innovative industries, and diverse employment opportunities to strengthen the Town's tax base and increase its job, retail, and service options.



Land Use & Development

From long-standing residential areas surrounding the historic Downtown to new neighborhoods like Heritage and Traditions, the community has grown from a Town of 5,769 residents in 1990 to one of 47,601 in 2020. With Wake Forest's population projected to more than double over the next two decades, it is critical that the Town plans ahead to ensure it can accommodate the growing resident body while continuing to support high quality of life for all.

The Wake Forest Community Plan addresses this by providing policy and direction for future land use and development for the next coming years. The Land Use Plan chapter is a high-level policy guide, indicating the type, intensity, and location of land uses and long-range investment. The chapter builds upon existing uses and patterns of development within the community, including areas within the Town's planning jurisdiction and growth areas. The Land Use Plan aims to establish a sustainable, compatible, and desirable mix of uses to meet the needs of current and future residents, while preserving the Town's assets and character that makes it unique in the region.



WHY IS A LAND USE PLAN IMPORTANT?

The Community Plan includes Wake Forest's new comprehensive land use plan that creates a long-term vision for the Town to implement over the next 10 to 20 years. It presents a cohesive vision that is representative of Wake Forest's residents, the business community, and community stakeholders.

Planning for future land use and development is important in ensuring the Town grows in a sustainable and attractive manner over the long term. This includes finding a balance between supporting regional growth pressures and housing demand while preserving Wake Forest's unique community character and assets.

Growth is undeniably here and happening in Wake Forest. It is critical that the Town identifies locations and strategies to accommodate housing, employment, and entertainment for the increasing population. The Community Plan establishes key recommendations for where and how future development should occur to ensure the Town grows in a strategic manner. Unlike the previous Community Plan, a Land Use Plan map is included in this Plan, which identifies where each type of future land use should be accommodated to ensure growth occurs strategically and is compatible to the existing context.

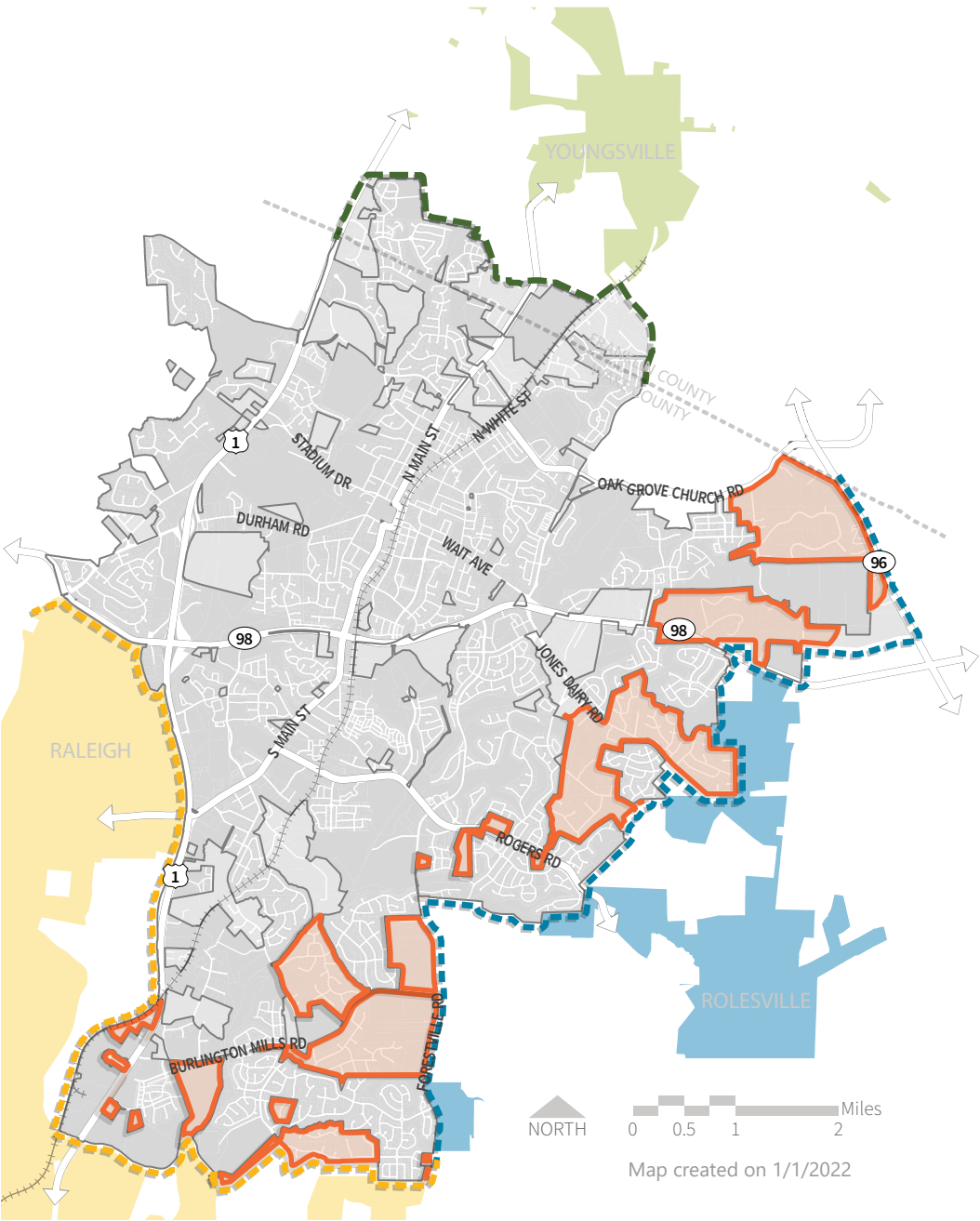
SUSTAINABLE GROWTH

To strategically plan for growth, Wake Forest's future land use and development must build off the Town's existing context, planning jurisdictions, and growth areas. The following section outlines the areas where the Town can plan. It presents a growth strategy to guide targeted, efficient, and sustainable growth.

PLANNING JURISDICTION

Wake Forest is primarily located within Wake County, with a small portion of its northern planning area located within Franklin County. The Town shares direct borders with the City of Raleigh to the south and southwest, the Town of Rolesville to the east, and the Town of Youngsville to the north. According to Chapter 160D Article 2 of the North Carolina General Statutes, the Town of Wake Forest is authorized to plan for all incorporated areas within its corporate limits as well as within its extraterritorial jurisdiction (ETJ). An ETJ includes areas outside a municipality’s corporate limits in which it can apply its planning and development regulations.

While State Statute grants a municipality with a population of 25,000 people or more the ability to plan for areas within three miles of its corporate boundary, Wake Forest’s planning jurisdiction is instead shaped by formal boundary agreements with its neighboring communities. The Town also has Urban Service Areas that identify potential locations for future water and sewer infrastructure extensions. Together, these create a defined planning area that includes approximately 17,000 acres of land, about 12,000 acres of which is incorporated and about 5,000 acres of which is unincorporated land.



PLANNING JURISDICTION

- Raleigh Boundary Agreement
- Raleigh
- Rolesville Boundary Agreement
- Rolesville
- Youngsville Boundary Agreement
- Youngsville
- Urban Service Area
- ++ Railroad
- Town Limits
- Within Town Limits
- Extraterritorial Jurisdiction (ETJ)

GROWTH STRATEGY

As Wake Forest continues to experience significant growth, it must balance preserving the character of the Town's established neighborhoods and supporting new residents and development in appropriate locations. A sustainable and efficient approach to growth will need to prioritize investment in existing infrastructure and established neighborhoods within Town limits before outward expansion. While the Land Use Plan designates where different types of development should be accommodated within the Town's planning area, a comprehensive approach must be taken to guide decisions related to short-, medium-, and long-term growth opportunities and public investment.

The growth strategy is guided by the following objectives:

- Prioritize infill development and reinvestment in established neighborhoods to maximize developable areas while maintaining the existing character.
- Focus development, redevelopment, and infrastructure improvements within Town limits and unincorporated pockets first before expanding into the eastern growth area.
- In the review and approval of proposed development, encourage development of areas that would not require annexation of non-contiguous land. If a non-contiguous area is proposed, work with applicants to explore more suitable land for the development if available.

Promoting Context-Sensitive Infill

Infill development is when a vacant, abandoned, or underutilized property is developed within an area that is largely built out. It supports sustainable development by reducing premature outward growth and greenfield development, while promoting land conservation and reinvestment in neighborhoods. As infill occurs, it is important that new development respects the character of existing neighborhoods while accommodating opportunities for a range of context-sensitive housing options that provides greater housing choices and commercial options. Base zoning district standards should be reviewed and updated to ensure they allow for higher densities while conforming to the surrounding context. Factors to consider include parking orientation and maximums, lot widths, setbacks, and building heights relative to adjacent properties. Incentives for infill development should also be evaluated, such as reduced permitting fees, increased maximum densities, and/or allowable building height.

Enhancing Infrastructure with Growth

Ease of mobility and access to quality utility services are key factors to high quality of life. As the Town continues to grow, it is important that infrastructure is improved and expanded to support the increasing population. As development proposals come online, the Town should continue to work with developers to assess impacts on roadway and utility infrastructure, ensuring necessary improvements are implemented to support new and existing residents. This includes mitigating traffic congestion as required by the UDO and State law, which was frequently cited as a concern by community members. Together with improving roadway capacities for vehicles, supporting multimodal connectivity and pedestrian-friendly environments will play a critical role mitigating congestion, while providing more equitable access to community destinations and enhancing quality of place.

LAND USE PLAN

The Land Use Plan outlines a vision for how land is developed and established neighborhoods are maintained within Wake Forest. It was created with an understanding that land use and development patterns have significant implications for the appearance, character, form, and function of the community. Building upon extensive community outreach, market realities, and regional development trends, the Land Use Plan seeks to ensure Wake Forest remains a livable, desirable, and sustainable community while continuing to grow, develop, and diversify.

The Land Use Plan identifies 10 distinct future land use designations within Wake Forest's planning area. The subsequent Residential, Commercial and Industrial, and Downtown Area Plans build on the Land Use Plan and provide specific policies and recommendations for each contributing land use and key development area within the Town.

- Conventional Residential
- Mixed Residential
- Transit-Supportive Residential
- Neighborhood Commercial
- Downtown
- Corridor Commercial
- Office, Civic & Institutional
- Light Industrial
- Parks & Open Space
- Utility



RENAISSANCE PLAN

The study area for the 2017 Renaissance Plan establishes recommendations for the revitalization of Wake Forest's historic Downtown. For further discussion on the Downtown, see page 58.



NORTHEAST COMMUNITY PLAN

The study area for the 2021 Northeast Community Plan provides detailed policies and actions to address the current and future needs of the Northeast Community including land use, economic development, and housing. For future land uses recommendations in this area, see the Northeast Community Plan.

Conventional Residential

Description:

Conventional Residential areas consist of a mix of housing types that resemble the character and form of traditional single family neighborhoods. This can include single-family homes as well as single-family attached and multifamily developments that appear like a single-family home, such as duplexes, cottage home courts, and townhomes. This land use category consists of Wake Forest’s long standing and newer neighborhoods and residential areas in the Glen Royall Mill Village National Historic District, the Wake Forest National Register District, and the Wake Forest Local Historic District. A mixture of lot sizes and dwelling sizes should be encouraged, with heights ranging from two to three stories. Conventional Residential areas should incorporate pocket and neighborhood-scale parks, public gathering spaces, community gardens, and trails that serve surrounding residents. Conventional Residential areas may incorporate commercial corner stores located at key entry points and intersections (page 62 in the Additional Considerations chapter provides additional location and design recommendations).

Primary Uses:

- Single-Family Detached
- Accessory Dwelling Unit
- Duplex
- Cottage Home Court
- Townhome
- Triplex/Quadplex

Supporting Uses:

- Commercial Corner Store
- Parks and Open Space
- Multi-Family



Example of an accessory dwelling unit (ADU)
Source: County of San Mateo



This photo will be replaced prior to the final draft.

Mixed Residential

Description:

Mixed Residential areas consist of planned developments that contain a wide mix of housing types, ranging from single-family homes to multifamily development. Such diversity in housing types provides opportunities to expand housing choices within the Town in a neighborhood environment. This land use category typically features smaller lot sizes and taller building heights than Conventional Residential areas. Where possible, Mixed Residential areas should serve as a transition from more intense development such as Transit-Supportive Residential and Neighborhood Commercial centers to Conventional Residential neighborhoods. Like Conventional Residential areas, Mixed Residential areas should incorporate pocket and neighborhood-scale parks, public gathering spaces, community gardens, and trails that serve surrounding residents. Mixed Residential areas may incorporate commercial corner stores located at key entry points and intersections (page 62 in the Additional Considerations chapter provides additional location and design recommendations).

Primary Uses:

- Single-Family Detached
- Accessory Dwelling Unit
- Duplex
- Cottage Home Court
- Townhome
- Triplex/Quadplex
- Two-Over-Two

Supporting Uses:

- Commercial Corner Store
- Parks and Open Space
- Multi-Family
- Senior Housing Facility
- Professional Service



This photo will be replaced prior to the final draft.



This photo will be replaced prior to the final draft.

Transit-Supportive Residential

Description:

Transit-Supportive Residential areas include compact residential areas featuring a variety of higher intensity housing types, like apartment buildings and two-over-tuos. Such housing types can feature shared building entrances, stairways, hallways, and amenities, with taller building heights and stacked units. This land use should continue to provide greater housing variety and density near Neighborhood Commercial and Corridor Commercial areas to allow more residents to live close to amenities. This includes along existing and future bus routes and transit hubs to sustainably reduce reliance on vehicles. High walkability and bikability should be promoted with well-connected sidewalks, trails, and bicycle routes, and parking lots located to the rear. This land use should provide a transition between lower density single-family residential areas and more intense land uses, such as office campuses and industrial areas. Small-lot or compact single-family developments are also appropriate.

Primary Uses:

- Multi-Family
- Two-Over-Two

Supporting Uses:

- Townhome
- Senior Housing Facility
- Commercial Corner Store
- Parks and Open Space
- Professional Service



This photo will be replaced prior to the final draft.



Neighborhood Commercial

Description:

Neighborhood Commercial uses include local-serving commercial nodes that provide surrounding residents with convenient access to day-to-day goods and services. Examples include hair salons, cafes, dry cleaners, restaurants, and small grocery or convenience stores. Neighborhood Commercial uses should support compact, pedestrian-oriented, mixed use environments with building scales compatible with adjacent residential areas. In cases other than adaptive reuse, new Neighborhood Commercial uses should include vertical mixed use buildings with ground-floor commercial and upper-story residential or office. They should be located along the Town's major roadways or intersections to provide a transition in intensity to more intense commercial areas and 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 Neighborhood Commercial nodes without having to drive. Future transit service expansions should target Neighborhood Commercial centers.

Primary Uses:

- Commercial Retail and Service
- Food and Drink
- Office
- Mixed Use

Supporting Uses:

- Institutional and Civic
- Entertainment and Cultural
- Public Gathering Space
- Live-Work
- Upper-Story Residential



Source: The Waterfront Vancouver



Source: Culinary Agents



Source: Gramor Development

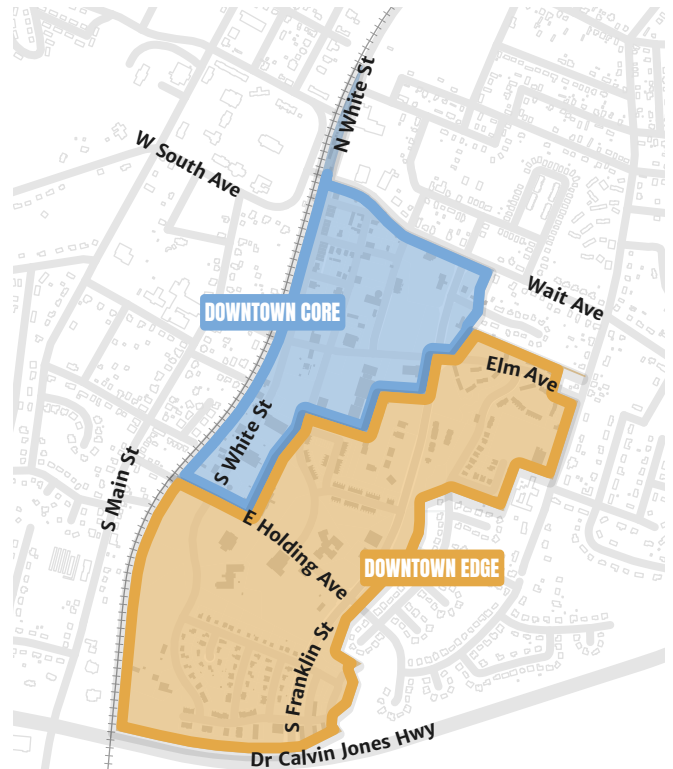
Downtown

Description:

Downtown includes two primary areas: the Downtown Core and the Downtown Edge. The Downtown Core should continue to serve as the historic heart of the Town and the center of culture, tourism, and civic activity. This includes integrated public gathering spaces that support social interaction and community events. The Downtown Core's streetscape should be activated with ground-floor commercial businesses and upper-story office uses. Higher density residential uses should be supported in the Downtown Edge or in the upper floors of Downtown Core mixed use buildings to increase living options near the Downtown's amenities. For more information on the Downtown, see the Downtown Area Plan on page 58.

Primary & Secondary Uses:

See page 58 for a more detailed breakdown of supported uses within Downtown.



Corridor Commercial

Description:

Corridor Commercial uses include auto-oriented retail and service businesses, such as large-scale shopping centers, grocery stores, restaurants, gas stations, and hotels. Standalone office uses are included within this designation. Corridor Commercial areas serve patrons from within Wake Forest and the region and play a role in strengthening the Town's tax base. Corridor Commercial uses should be situated at highly visible and accessible locations along the Town's major roadways, including Capital Boulevard, Rogers Road, and Dr. Calvin Jones Highway. Surface parking lots should be strongly encouraged to be behind buildings. Internal sidewalks, bikeways, and bicycle parking should be provided to link Corridor Commercial uses to the larger active transportation network. Transit access should be strengthened to Corridor Commercial destinations to improve multimodal connectivity.

Primary Uses:

- Commercial Retail and Service
- Food and Drink
- Hotel

Supporting Uses:

- Office
- Entertainment and Cultural
- Institutional and Civic
- Public Gathering Space



Office, Civic & Institutional

Description:

Office, Civic, and Institutional uses contain large-scale, standalone office developments, like corporate headquarters or hospitals, and clusters of smaller-scale offices, like professional services, legal firms, and medical offices. It also includes local government uses, municipal facilities, community service providers, educational facilities, and religious institutions. Examples include Town Hall, fire stations, places of worship, the Wake Forest Community Library, Wake County public schools, charter schools, private schools, and the Southeastern Baptist Theological Seminary. This land use should support local employment opportunities within Wake Forest and be well connected to the multimodal network to provide residents access to community services. Concentrations of Office, Civic, and Institutional uses should incorporate a campus-style site design, with internal pedestrian pathways, ample landscaping, and clear signage of businesses at the entrance. The improvement or expansion of existing community facilities and the development of new facilities should be accomplished through close coordination with respective agencies and governmental entities.

Primary Uses:

- Office
- Institutional and Civic
- Medical

Supporting Uses:

- Commercial Retail and Service
- Higher Education Residential
- Public Gathering Space



Light Industrial

Description:

Light Industrial uses diversify the Town's tax base and provide local employment opportunities. They include facilities involved in the manufacturing, processing, storage, and distribution of goods and materials; telecommunication facilities; research centers; R&D/life sciences facilities; tech industries; and flex spaces. Light Industrial uses should feature large-scale, typically single-story buildings that produce minimal outdoor activity. Light Industrial uses should be concentrated in campus-style industrial parks located near major roadways, with sufficient setbacks and screening to reduce visibility and noise impacts on surrounding uses. Compatible office uses that offer supporting services may be appropriate, as well as accessory commercial uses within industrial buildings, such as a furniture maker with a showroom.

Primary Uses:

- Industrial

Supporting Uses:

- Office



Source: Encore TechLab



Parks & Open Space

Description:

Parks and Open Space includes designated public park spaces managed by the Wake Forest Parks, Recreation, and Cultural Resources Department, as well as golf courses and cemeteries. Open space includes land preserved as natural areas or for outdoor recreational purposes. Efforts to provide equitable public park access and quality programming across the community should be pursued through close coordination with the Parks, Recreation, and Cultural Resources Department.

Primary Uses:

- Parks and Open Space
- Greenway
- Conservation Area
- Cemetery

Supporting Uses:

- Institutional and Civic



Utility

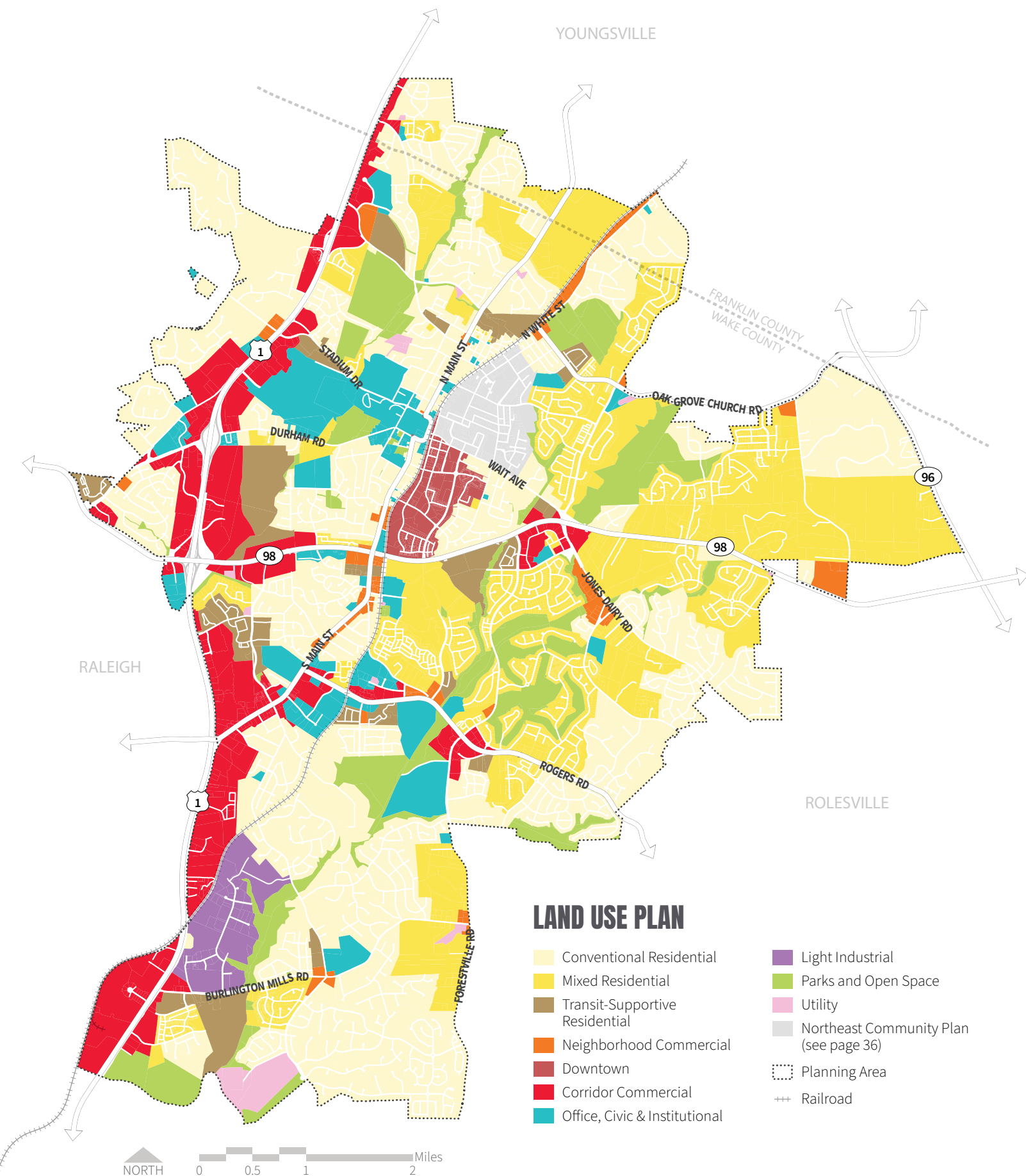
Description:

The Utility land use designation includes utility infrastructure, such as electrical substations and water treatment facilities. Utility uses should be reserved for maintaining the facilities and other infrastructure essential to the operation of the Town. Unattractive facilities should be well screened from neighboring uses to maintain high quality character in the community.

Primary Uses:

- Utility Infrastructure
- Water and Sewer Facility





TOD & ACTIVITY CENTER AREAS

The following section provides guidelines for Transit-Oriented Development (TOD) and Activity Centers that should be applied to the identified areas in addition to their underlying land use designations. These areas have a pedestrian focus with the aim to support a vibrant mix of uses, multimodal connectivity, and high levels of activity.

Transit-Oriented Development

Three potential S-Line stations are being considered in Wake Forest for a local commuter and regional intercity rail service (see page 78 for more information). They present a major opportunity to support highly walkable, active environments, with the most urban and compact development in Wake Forest. TOD should be concentrated around future stations (within about a half mile radius) to provide a critical mass of development and a mix of uses to support and fully leverage the key transit service. Uses should include commercial retail and service, office, residential, and employment, with a focus on mixed use development. Surface parking lots should be limited and oriented to the rear of buildings, with on-street parking and parking garages taking precedence due to higher walkability and access to transit. Streets should be designed to encourage walking and biking, with small blocks, wide sidewalks, safe crossings, bicycle routes and parking stations, and buildings near the property line. If a S-Line station is located in Downtown, a careful balance must be met between supporting future transit-oriented development and preserving the existing historic character.

Activity Center

Activity centers are unique focal points of the community where residents can gather, socialize, live, work, and shop. They should serve as hubs of art, culture, entertainment, and community events where residents can spend time and build a sense of community. They 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. Examples include local restaurants, cafes, breweries, maker spaces, incubator spaces, art galleries, music venues, and artisan shops. Mixed use buildings with residential or offices above commercial should provide live/work opportunities and generate greater foot traffic. Attractive public gathering spaces, play areas, and/or outdoor seating areas should be incorporated to create communal areas where residents can meet and spend leisure time outside their home and work.

Primary Uses:

- Commercial Retail and Service
- Food and Drink
- Entertainment and Cultural
- Office
- Mixed Use Development
- Institutional and Civic
- Parks and Open Space
- Hotel
- Parking Garage

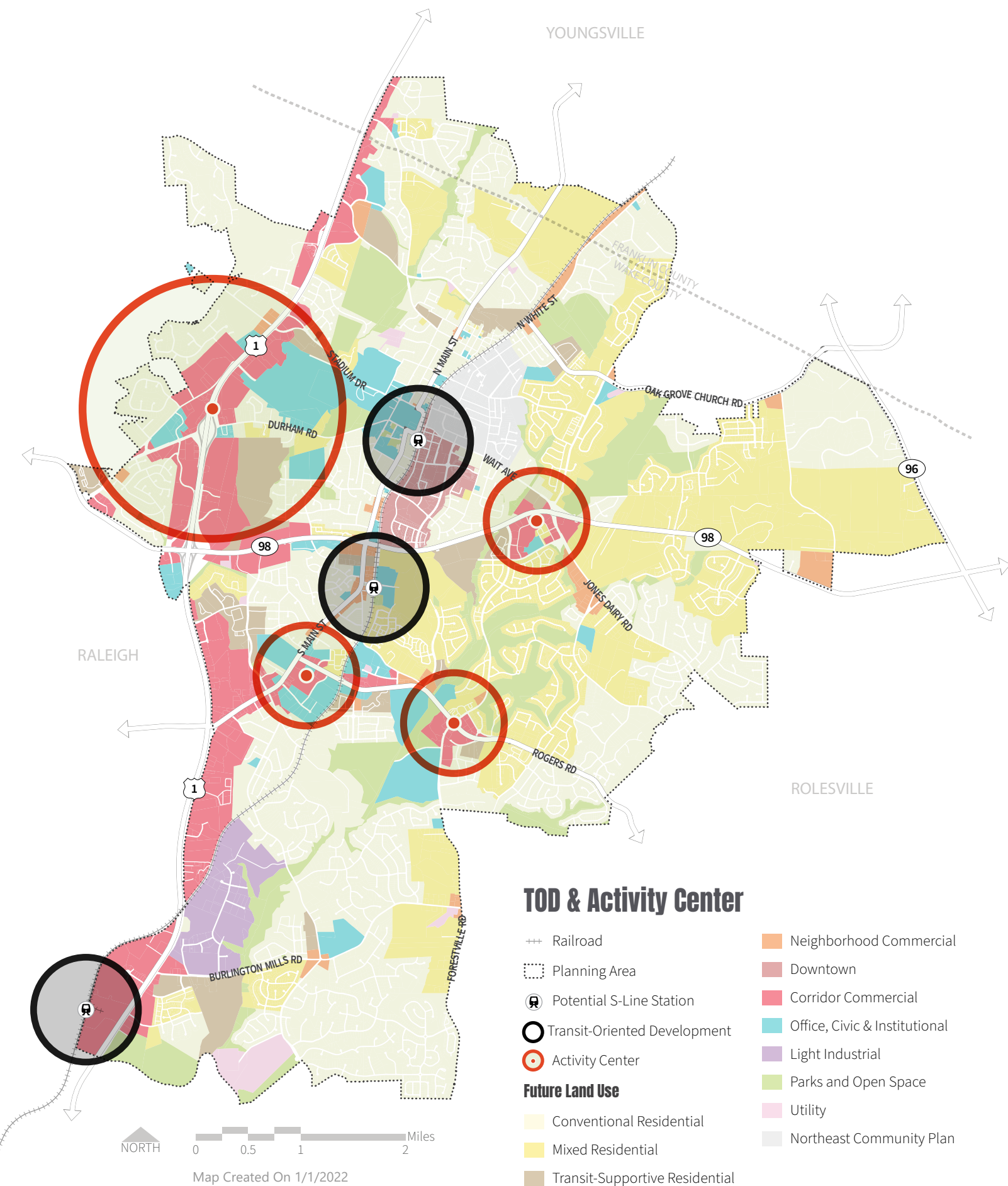
Supporting Uses:

- Townhome
- Two-Over-Two
- Multifamily
- Public Gathering Space



Source: Experience Avalon







RESIDENTIAL AREAS PLAN

The Residential Areas Plan builds on the Land Use Plan, providing a detailed yet flexible guide for preserving existing neighborhoods while supporting new housing options for Wake Forest's growing population. To ensure Wake Forest can support projected growth in the years to come, the Residential Areas Plan focuses on increasing housing diversity and equity, emphasizing a range of housing choices for people of all stages of life and income levels. The Residential Areas Plan supports diversified housing options in appropriate locations. Prioritizing infill and redevelopment opportunities before outward growth will be critical to ensuring new residential growth occurs in a sustainable, strategic manner.

Note: The following area plans are not prioritized or ranked in any order.

Existing Residential

This category includes the Town's existing residential neighborhoods, such as Remington Woods, Heritage, Oakwood Estates, and Traditions. These neighborhoods consist of single-family detached, single-family attached, and multifamily dwellings. Reinvestment in housing stock and infrastructure should be an area of focus as existing neighborhoods age and reinvestment is necessary to maintain their quality and character for Wake Forest residents.

Reinvestment should include roadway and sidewalk maintenance, strategic curb and gutter construction, tree canopy growth and expansion, and utility line and stormwater management system upgrades. Older neighborhoods developed before the 1990s should be prioritized where such amenities do not exist or have substantially aged. Future redevelopment should be compatible with the built form of existing properties to be respectful of the existing character.

1 Former Wake Forest Golf Course

Once the Wake Forest County Club, this large property at Capital Boulevard and Country Club Drive now sits abandoned and requires a balanced perspective for redevelopment. To preserve and protect the environmentally sensitive areas such as Horse Creek, existing ponds, and floodplain, a cluster subdivision development is required. These environmentally sensitive areas should be integrated into the site design as enhanced resident amenities with development only permitted east of Horse Creek and north of the existing ponds running parallel to County Club Drive. Pedestrian and bicycle connections should be provided within the site and should connect to the larger network. Connectivity should be emphasized to nearby commercial areas along Capital Boulevard and E. Carrol Joyner Park to the east.

2 Harris Road

Leveraging its direct access to Capital Boulevard, Richland Creek Elementary School, E. Carrol Joyner Park, and Harris Teeter, this undeveloped property should be developed into Transit-Supportive Residential with a mix of higher density residential types. Lower intensity residential types should be located adjacent to existing single-family detached homes along



Wallridge Drive and Harris Point Way to complement their character and scale, such as smaller-scale townhomes and duplexes that mimic the character of single-family detached homes. Pedestrian and bicycle access and safe crosswalks should be prioritized along Wallridge Drive and Harris Road to create safe routes to school, parks, and shopping areas. Age-targeted housing should be encouraged to provide desirable senior housing options near such amenities.

3 Jenkins Road & Capital Boulevard

This undeveloped property should be developed into Conventional Residential with primarily single-family detached homes that builds off the surrounding low density residential development. Single-family attached homes should be located towards the southeastern end of the site to provide a transition into the adjacent Neighborhood Commercial development. Horse Creek and its floodplain should be preserved and enhanced as an amenity for residents, such as with walking paths and seating. Safe pedestrian and bicycle connections should be provided to Wake Forest Crossing on the east side of Capital Boulevard.

4 Durham Road & Capital Boulevard

This large scale undeveloped property should be developed into Transit-Supportive Residential to provide greater housing choices near Capital Boulevard and its amenities. This includes primarily multifamily development and townhomes supported at a lower scale. This development should leverage access to Ligon Mill Road, providing roadway connectivity that aligns with the existing street. Pedestrian-oriented neighborhood-serving businesses should be supported, particularly along the western limits adjacent to Corridor Commercial uses along Capital Boulevard. Mixed use buildings and/or supporting commercial corner stores may also be supported.

5 Historic Residential

This category includes residential properties within the Glen Royall Mill Village National Historic District, the Wake Forest National Register District, and the Wake Forest Local Historic District. These districts contain historic homes that date back to the 19th and mid-20th centuries, concentrated along the west side of the CSX railroad tracks near the old Wake Forest College Campus (now the Southeastern Baptist Theological Seminary). These residential properties should be preserved and maintained as historic

assets and tangible evidence of the Town's history. Properties within the Local Historic District require approval from the Historic Preservation Commission for any exterior changes. However, future renovations and new development in all historic districts should follow the design standards in the Wake Forest Historic Property Handbook and Design Standards to protect the special character of the historic properties and districts.

6 306 S Allen Road

This property currently holds a residential care facility that was built in 1958 and has been vacant for over 10 years. Leveraging its proximity to Downtown, and to help address the need for senior housing, this property should be redeveloped into new housing targeted to seniors that matches the scale of the surrounding single-family neighborhood. This could include a new residential care facility or age-targeted single-family detached housing, such as a cottage home court (detached dwellings developed in clusters around a communal open space). Multifamily development should be avoided to maintain existing character.



7 Wait Avenue

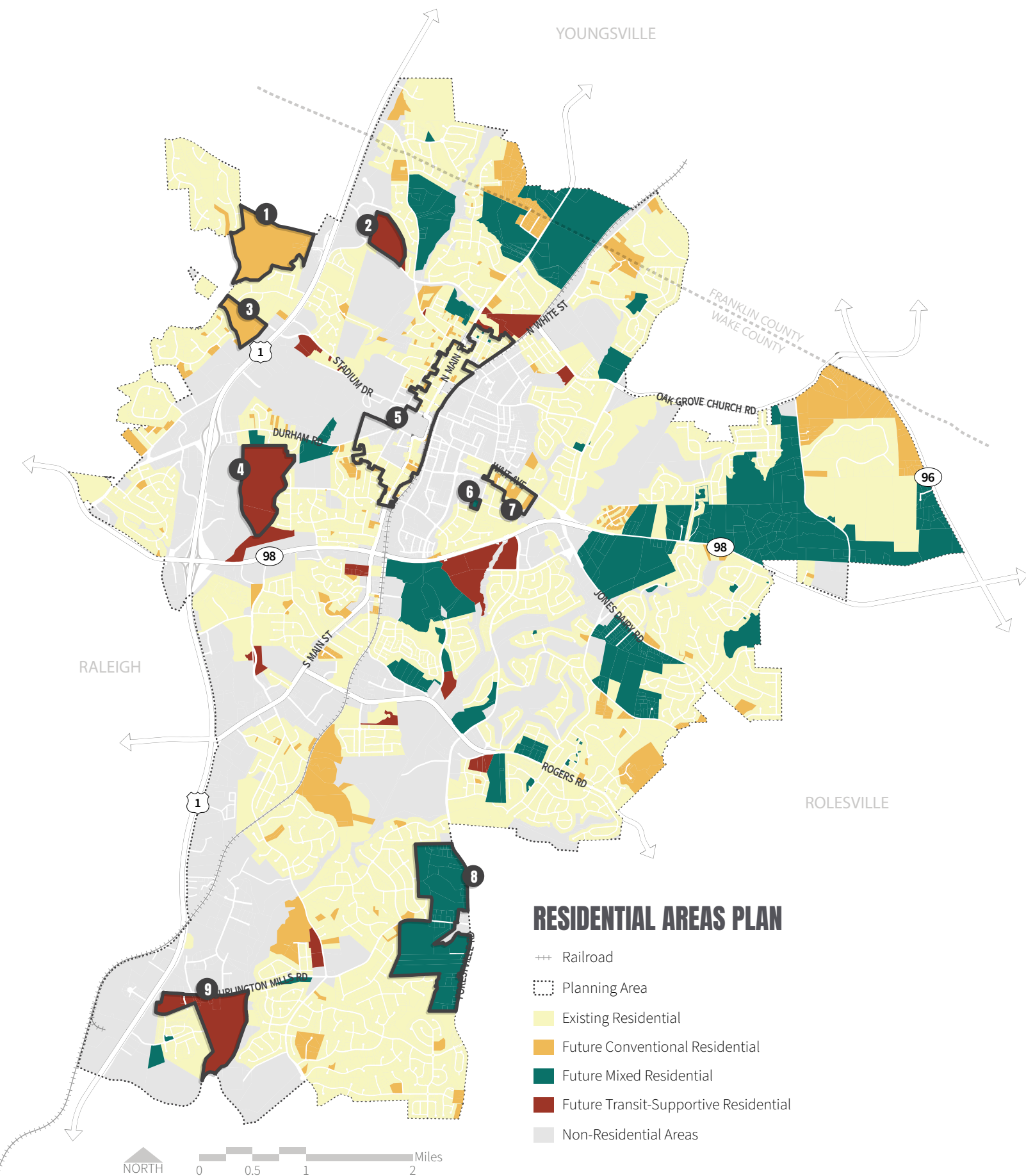
A collection of undeveloped parcels is dispersed along Wait Avenue between N Allen Road and Traditions Grande Boulevard. Due to their larger parcel size within the surrounding context, a mix of housing types should be encouraged to complement the scale and character of adjacent single-family detached homes. This includes single-family detached homes, duplexes, cottage home courts, townhomes, triplexes, and quadplexes. Accommodating greater housing options than only single-family detached homes would allow more residents to live in this desirable location close to Downtown while remaining compatible the character of the existing neighborhood.

8 Forestville Road & Burlington Mills Road

This area presents great potential for Mixed Residential development due to its large scale and convenient access to Forestville Road and Burlington Mills Road. A diverse variety of housing should be provided within the development, ranging from small lot single-family detached housing to lower intensity multifamily development. More dense housing types should be located near the major roadways to act as a buffer from traffic activity to lower intensity residential development. Neighborhood-serving corner stores or food and drink establishments is appropriate, such as along Burlington Mills Road. Traffic impacts of future development should be examined and roadway infrastructure and access management should be upgraded as needed to sufficiently support new development.

9 One World Way & Burlington Mills Road

These properties should be targeted for workforce housing to leverage proximity to the Light Industrial area north of Burlington Mills Road and access to Capital Boulevard. This would allow workers to be within walking distance to their jobs and nearby shopping options. As this area is near a potential S-Line station, TOD may also be supported with ground floor commercial and upper floor residential. Appropriate housing types include multifamily, two-over-twos, duplexes, and townhomes that are affordable to households earning 60 to 120 percent of the area's medium income (AMI).





Source: Gramor Development

COMMERCIAL & INDUSTRIAL AREAS PLAN

The Commercial and Industrial Areas Plan builds on the Land Use Plan and offers an achievable approach for maintaining and growing Wake Forest's commercial, employment, and industrial areas. The Plan aims to diversify businesses, grow local job opportunities, and build a sustainable, resilient economy. This includes increasing local shopping options and employment opportunities to ensure residents no longer need to travel outside the Town for work and major shopping needs. Prioritizing the activation of vacant businesses and redevelopment opportunities before greenfield development and outward growth will ensure the Town's commercial and industrial areas develop sustainably. The Commercial and Industrial Areas Plan highlights multimodal connectivity to Wake Forest's commercial and employment to ensure residents can safely and conveniently access their destinations as desired via walking, biking, or transit.

Note: The following area plans are not prioritized or ranked in any order.

1 Capital Boulevard

Capital Boulevard is a major arterial roadway that connects Wake Forest with the surrounding region, including the City of Raleigh. It is the primary route residents and visitors take to pass through the Town. The development of undeveloped and underdeveloped land along Capital Boulevard into commercial uses should be encouraged with both a local and regional customer base. This should be done in coordination with NCDOT's planned controlled-access highway conversion project that will affect roadway configurations. TOD may also be supported near the potential S-Line station at the southern end of the corridor. High quality development should be promoted that features efficient access management, landscaping, and attractive building façades to support a desirable character along this well-traveled roadway. Where commercial uses abut residential areas, sufficient screening and buffering should be in place to provide a smooth transition into lower intensity neighborhoods, screen commercial activity, and preserve the residential character.

2 N White Street

Over the long term, the existing light industrial and auto-oriented development along the west side of N White Street should redevelop into neighborhood-serving retail and services. These uses should serve as a buffer between the railroad and the residential areas to the east while providing residents with access to a variety of food and drink establishments, shops, personal services, and other local businesses. Parking lots should be located to the rear and continuous sidewalks should support high pedestrian connectivity between businesses. A multi-use path along N White Street should further improve pedestrian access and connectivity. Pedestrian and bike connections and safe crossings should provide easy access to Flaherty Park Community Center, Northeast community, and the surrounding neighborhoods.

3 Tech Park

Located near Downtown, the Southeastern Baptist Theological Seminary (formerly Wake Forest College) brings about 3,400 students to the Town each year, playing a vital role in the local economy. The 169 acres west of the campus owned by the Seminary (between Patterson Hall and the Wake Forest Crossing shopping center) is being considered for a future live-work-play tech park. This project



should be supported to increase local job opportunities and the variety of residential and commercial development within the Town, including office, biopharma and life science uses. Compact, walkable development that engage the street and integrated public spaces should be encouraged for a campus-like feel. Single user lots that are not incorporated together should be avoided.

4 S Main Street (North)

S Main Street is a gateway route into Downtown that features aging local commercial businesses, some of which are auto-oriented. Neighborhood-serving commercial uses should continue to be promoted within this area, with an emphasis on improving the corridor's character and supporting day-to-day retail and service options. Working with property owners, existing parking lots should be enhanced in the near term with perimeter landscaping. As redevelopment opportunities arise, parking should be situated to the rear and new buildings should match the setback of adjacent single-family homes, if space allows. Sidewalk conditions should be improved with opportunities for safe pedestrian crossings.

5 Dr Calvin Jones (Hwy 98) Corridor

Dr Calvin Jones Highway (Hwy 98) is a primary east-west corridor that runs through the heart of Wake Forest. It provides connections to key destinations like the Downtown, Heritage, Gateway Commons, and neighboring communities. Infill development should include a mix of regional- and local-serving retail, service, and office uses. Buildings should be located near the right-of-way for visibility along the corridor with parking to the rear. Pedestrian and bike access should be enhanced with a well-buffered sidewalk network along Dr Calvin Jones Highway, safe crossings at traffic signals, pedestrian-scaled lighting, bike parking stations, and internal pedestrian pathways. Street trees and interior and perimeter parking lot landscaping should improve the character of the corridor. Strategically implemented cross access between businesses and efficient access management should reduce congestion and traffic conflicts along Dr Calvin Jones Highway.

6 Forestville Mixed Use

This section of S Main Street includes historic buildings that are remnants of the once thriving railroad town of Forestville. Preservation of these structures will be key as tangible evidence of its rich history. Forestville's aging and disinvested properties should be a focus for exterior improvements or redevelopment that conforms with the character of the surrounding single-family neighborhood. Remaining industrial businesses should redevelop into local-serving commercial or small-scale mixed use that respects the existing architectural style. Existing unpaved parking lots should be paved and future parking should be located to the rear. Buildings should be located near the property line to form a consistent setback in line with adjacent residential properties and a desirable sense of enclosure. New pedestrian crossings, completed bike lanes, and continuous sidewalks on both sides of S Main Street should improve safety, walkability, and bikeability, especially as it is located near a potential S-Line station. Wayfinding and signage should be incorporated to reinforce the corridor's sense of place and historic significance.



7 Rogers Road Corridor

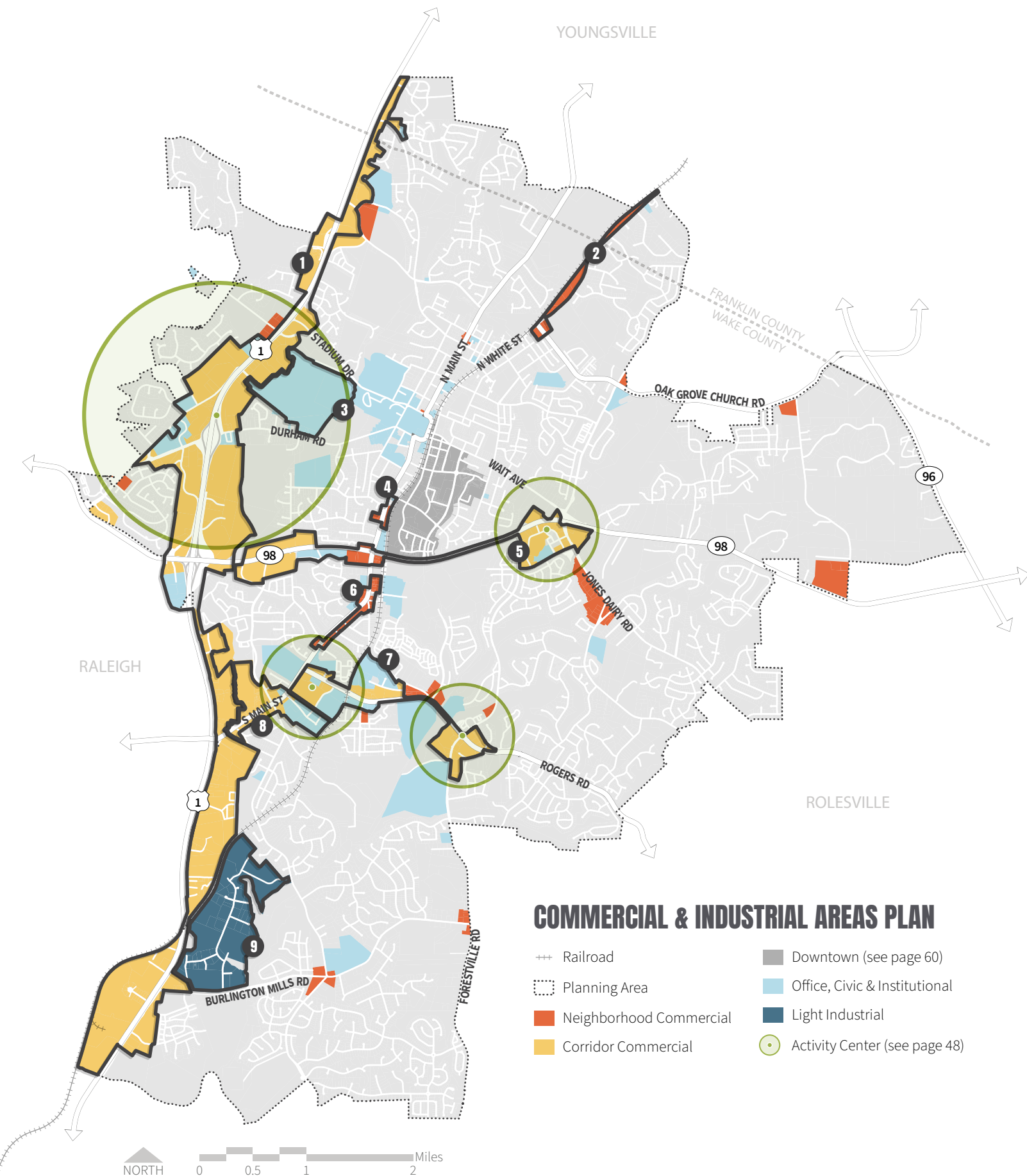
Rogers Road is a major east-west roadway that contains a robust variety of commercial and office businesses. Vacant lots along the Rogers Road corridor should be a focus for infill with additional retail, service, and office uses. As traffic congestion is increasingly becoming an issue, roadway capacity and access management improvements should be prioritized to support future development. Cross access between businesses and connected, alternative routes should be encouraged to reduce traffic impacts along Rogers Road. Pedestrian and bike connectivity along the corridor should be improved with a complete sidewalk network, ample streetscapes between the sidewalk and curb, and safe crossings at traffic signals. To improve onsite multimodal access, pedestrian walkways, bike parking, and parking lot lighting should be incorporated. Landscaping should be used to improve the character of the corridor, including trees along the external sidewalk network and perimeter and internal parking lot landscaping.

8 S Main Street (South)

The Main Street corridor is an entryway into Wake Forest from Capital Boulevard and a gateway into Downtown. For this important corridor, reinvestment in aging commercial buildings and the redevelopment of disinvested structures should be a priority. Future development patterns should include building placement near the sidewalk with parking to the side or rear, promoting a pedestrian-friendly environment. Pedestrian comfort and safety should be improved by closing gaps in the sidewalk system, reducing driveway cuts, widening narrow sidewalks, and providing adequate landscaped buffers between sidewalks and travel lanes. Aesthetics and stormwater functions should be enhanced by working with property owners to resurface deteriorating parking lots and upgrade them with interior and perimeter landscaping.

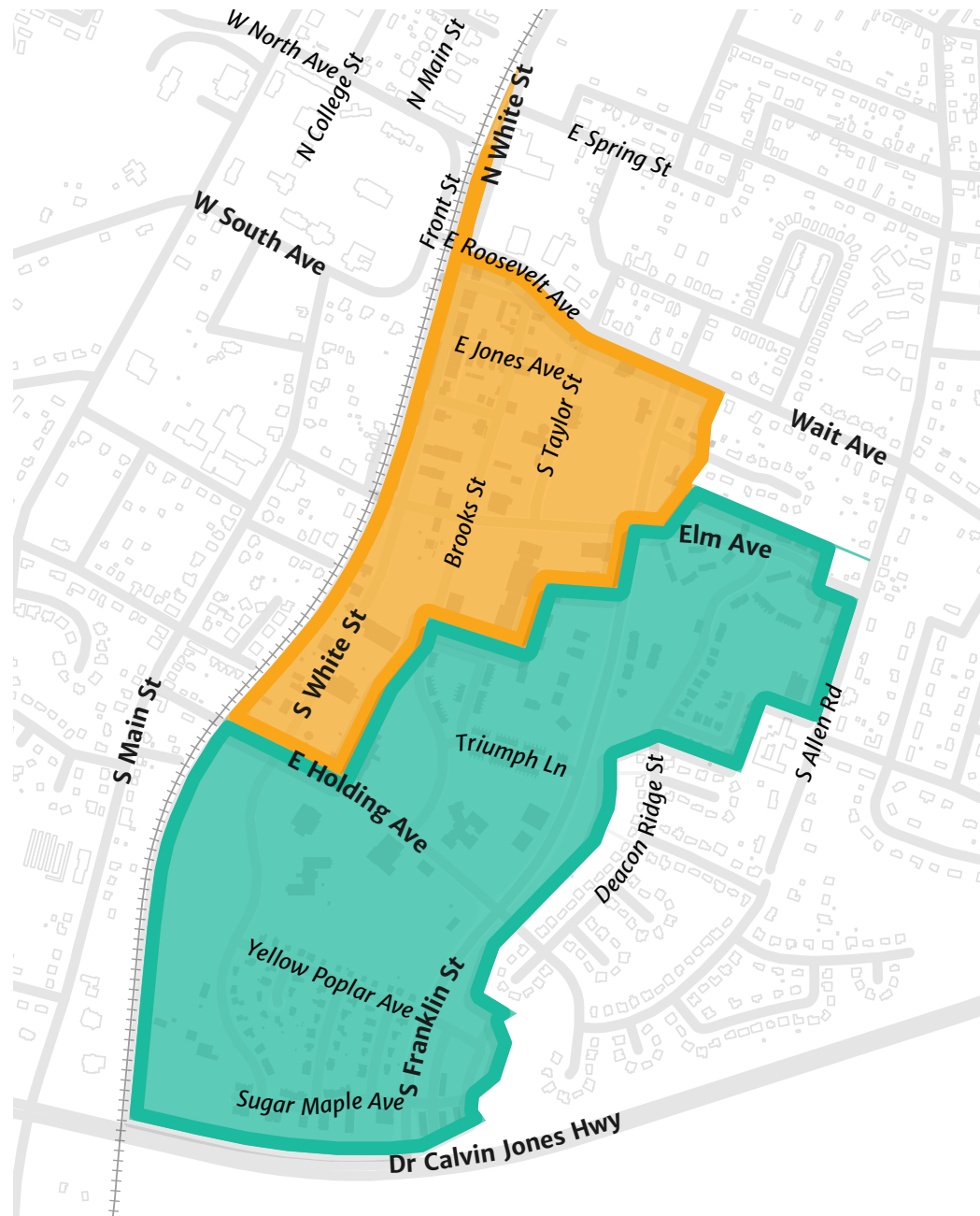
9 Unicon Drive Industrial

Expanding on existing industrial development, future light industrial growth around Unicon Drive should increase local job opportunities and strengthen the Town's tax base. Desirable examples include small-scale manufacturing, biotech, and green industries. Buildings should feature high quality facades that incorporate windows and variations in building material and/or color at its main entrance to help establish an attractive industrial hub. This location benefits from easy roadway access off Capital Boulevard for freight; however, the Town should ensure all truck activity is directed away from adjacent residential neighborhoods. Ample screening, buffering, and setbacks of industrial uses from the residential areas should preserve their character and mitigate adverse impacts in the neighborhoods.



DOWNTOWN AREA PLAN

The Downtown Area Plan outlines a framework for future land use and development within Wake Forest's Downtown. It aims to preserve Downtown's historic character while strengthening a thriving community center where all can visit, work, shop, and live. The Downtown Area Plan divides Wake Forest's Downtown into functional subareas based on existing land use, built form, and character. While all are part of Downtown, each subarea is unique and functions differently from the other. Tailored recommendations for future growth and subsequent planning efforts are provided for each subarea, addressing their distinct contexts while ensuring they work cohesively to form a unified Downtown area.



- Downtown Core
- Downtown Edge

Downtown Core Area

The Downtown Core Area is the heart of Wake Forest. It includes the Downtown Wake Forest National Register Historic District and the Downtown expansion along South White Street. This area should continue to serve as a hub of dining, shopping, entertainment, and community events while offering housing and office space that can leverage direct access to Downtown's amenities. Investments into placemaking and streetscaping should continue, including for public art, pedestrian-scale lighting, landscaping, and wayfinding. Programmed public gathering spaces should be integrated, providing attractive spaces for socializing, relaxation, and play for all ages. Rooftop and patio dining should also be encouraged to enliven Downtown's atmosphere. Parking should be provided on-street or in rear parking lots to foster a pedestrian-friendly environment. Parking garages and podium parking should be encouraged throughout the Downtown Core Area, aside from the Downtown Wake Forest National Register Historic District. Parking decks should be designed to blend in with the character of the area, with street-level commercial and rear and upper-floor parking.

Core Mixed Use

The Core Mixed Use area supports a compact, pedestrian-friendly, and unique environment, with a vibrant mix of local retail, service, entertainment, office, and civic uses. Examples include restaurants, bars, coffee shops, bookstores, banks, boutiques, and salons. To foster a unique business environment, franchise stores should be discouraged in this area in favor of locally owned businesses. Buildings should be located at the property line to create a desirable sense of enclosure and consistent street wall with activated storefronts.

Mixed use development (ground-floor commercial and upper-floor residential or office) and rooftop and patio dining should be encouraged to support an activated streetscape. New development and façade improvements should fit cohesively with the existing historic character. This includes future transit-oriented development that may occur with the proposed S-Line station at the edge of this area. Adaptive reuse should be promoted in the Core Mixed Use area to maintain the Downtown's historic structures.

S White Street Corridor

The S White Street Corridor area should serve as an extension of the Core Mixed Use area to expand the footprint of Downtown. Creative, co-working, incubator, and maker spaces (or collaborative hands-on learning and work spaces) should be encouraged in this area to create a hub of entrepreneurship and creativity that builds off the Loading Dock's culture. As opportunities arise, auto-oriented and industrial uses with desirable built form should be redeveloped or repurposed.

Higher density mixed use buildings like the PowerHouse Row should be supported, with ground-floor commercial and upper-story residential or office. Leveraging the decreasing grade change, building heights of three stories or more should be encouraged to maximize development potential within the S White Street Corridor area. Wide, continuous sidewalks, buildings near the property line, and parking to the rear or on-street should be encouraged to foster a pedestrian-oriented environment. Activated outdoor spaces and outdoor seating/dining should also be encouraged.

Renaissance Centre

The Renaissance Centre for the Arts is a community asset that provides theater and performance art opportunities within the Town. The current site features a standalone commercial use (Dollar General) and an expansive front-loaded parking lot, which disengages buildings from the rest of the Downtown Core. If the property owners were to choose to further enhance the site, below are two alternatives to consider:

- Redevelop the Dollar General and parking lot into a block of mixed use buildings facing Brooks Street, Elm Avenue, and the strip mall. New streets should be constructed to support a pedestrian-oriented environment.
- Explore opportunities to redevelop the site as a highly walkable environment, with mixed use buildings on either side of Brooks Street. The Renaissance Centre could be rebuilt as a state-of-the-art facility that attracts tourists and serves as the center of a collection of arts-oriented businesses.

The Town should remain flexible and creative in the design, integrating public open spaces, outdoor seating areas, attractive lighting, landscaping, and pedestrian walkways to create a unique destination within Downtown Wake Forest. For either Renaissance Centre scenario, parking should be provided on-street or consolidated into a parking garage.

Community Facilities & Utilities

Community Facilities and Utilities in the Downtown Core Area include existing community facilities like Town Hall, the Wake Forest Police Department, and Centennial Plaza. Future improvements, expansions, or buildouts of facilities should be accomplished through close coordination with respective agencies and governmental entities.

Downtown Wake Forest National Register Historic District

Listed in the National Register of Historic Places in 2002, the Downtown Wake Forest National Register Historic District is the center of the Downtown Core Area concentrated around S White Street. It contains historically significant buildings that contribute to Downtown's historic character and heritage, like the Wilkinson Building, the Old Library Building, the Brewer Building, and the old cotton warehouse. Buildings in the Historic District date from 1890 to 1949, range in height from one to three stories, and are primarily brick construction. Façade features include metal cornices, corbeling and other decorative brickwork, and storefronts with display windows and recessed entries. The historic character of the buildings and the district should continue to be preserved by implementing the Secretary of Interior's Standards for Rehabilitation to renovations and new construction. New development should match the character and scale of the district's historic buildings.

Downtown Edge Area

The Downtown Edge surrounds the Downtown Core and is primarily made up of residential uses and community facilities. Higher density residential options should continue to be promoted within the Downtown Edge to provide attractive, diverse, and equitable housing options near the Downtown Core and its amenities. Increasing living options in this area would also support business success within the Downtown Core Area with a greater customer base nearby. Buildings should be oriented towards the street, adjacent buildings, and attractive vistas to support a pedestrian-friendly environment. Pedestrian and bike connectivity should be prioritized to ensure residents can conveniently walk or bike to the Downtown Core.

Conventional Residential

Existing single-family detached areas should be maintained by reinvesting in roadway and utility infrastructure as needed. Higher density infill development, such as duplexes and accessory dwelling units, should be supported to match the area's existing character and further diversify housing choices.

Mixed Residential

Existing single-family attached homes should be maintained and reinvestment in roadway and utility infrastructure should occur as needed. Existing examples include the Retreat at Renaissance Townhomes, Avondale Townhomes, and Heath Ridge Village. Traditional neighborhood formats, with rear parking garages that are accessible by an alley, should continue to be encouraged to improve the character of the neighborhood streetscape. If front-loaded garages are included, garages should be paired to increase room for the entryway/porch area and front yard.

Transit-Supportive Residential

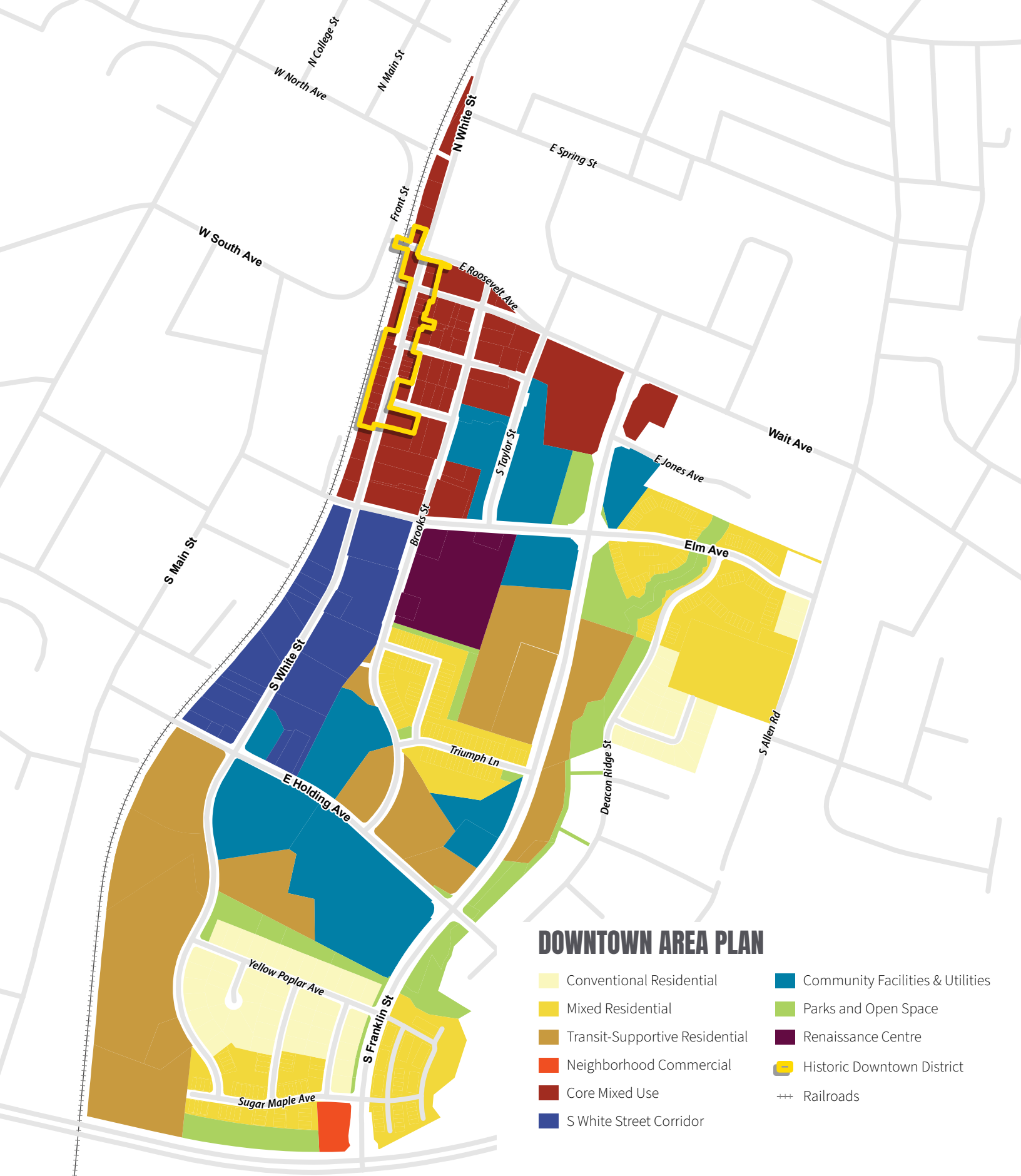
Multifamily areas should benefit from reinvestment in roadway and utility infrastructure as needed. New higher density residential development should be encouraged within undeveloped areas, such as along the western side of S White Street. This includes apartments, multiplexes, and townhomes, which provide smaller-unit affordable rental and owner options near Downtown.

Neighborhood Commercial

A standalone commercial use (Village Pharmacy of Wake Forest) currently exists at the corner of Dr. Calvin Jones Highway and S Franklin Street. The commercial use should remain, and safe multimodal connectivity should be prioritized at the intersection of S Franklin Street and Sugar Maple Avenue and across Dr. Calvin Jones Highway by providing continuous sidewalks and highly visible crossings.

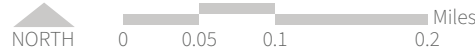
Community Facilities

Community Facilities and Utilities in the Downtown Edge Area include existing community facilities like the Wake Forest Community Library, Franklin Academy, and Wake County Northern Regional Center. Future improvements, expansions, or buildouts of facilities should be accomplished through close coordination with respective agencies and governmental entities. Redevelopment of the Post Office or an outparcel addition should be considered to better activate the large vacant area located at a prime Downtown corner (E Holding Avenue and S White Street). This could include a three- to four-story building that is located near the street.



DOWNTOWN AREA PLAN

- Conventional Residential
- Mixed Residential
- Transit-Supportive Residential
- Neighborhood Commercial
- Core Mixed Use
- S White Street Corridor
- Community Facilities & Utilities
- Parks and Open Space
- Renaissance Centre
- Historic Downtown District
- Railroads



Additional Considerations

The following Additional Considerations chapter provides factors and influences to consider for land use and development as Wake Forest grows. These core considerations provide a lens through which the recommendations and strategies outlined in the Land Use Plan should be implemented and how efforts for future development should be guided. These key factors are intended to ensure Wake Forest grows in a manner that is equitable, sustainable, attractive, and economically viable, continuing to improve quality of life and enhance the Town as an excellent place to live and work.

IN THIS CHAPTER

Housing Affordability

Residential Character

Senior Housing

Commercial Development

Minority & Women-Owned Businesses

Setbacks

Parking Lots

Screening & Buffering

Community Character

Utility Lines

Historic Preservation

Community Facilities

Public Transit

S-Line

Capital Boulevard

Street Connectivity

Sidewalks & Multi-Use Paths

Bikeways, Greenways & Trails

Local Food Systems

Conservation Design

Green Space Preservation

Tree Canopy

Sustainable Development

Tourism

Gateways

Downtown Wake Forest



HOUSING AFFORDABILITY

Much of the recent residential growth in Wake Forest has created a mix of new single-family and multifamily neighborhoods, such as Heritage and Traditions. These developments exhibit high-quality architecture, well-connected sidewalks, and ample landscaping. Although these developments are highly desirable, the added cost of amenities and infrastructure contributes to the high cost of housing in Wake Forest and has led to a shortage of homes priced for households earning at or below the median area income. There is a strong need to increase housing choices and attainability for all income groups, stages of life, and backgrounds, particularly near job centers and transit to reduce transportation cost burdens. This will help ensure Wake Forest continues to be welcoming to all and existing residents can remain in the place they call home.

Affordable Housing Plan

The Town is currently developing a new Affordable Housing Plan, anticipated to be adopted in 2022, which will provide tools and strategies for improving housing affordability within Wake Forest. The existing conditions analysis phase of the project identifies a 61% increase in home prices since 2015 due to rapid growth and increasing housing pressures. It also identifies that low- and very low-income renters (below \$40,000 household income) are particularly cost burdened, with single-parents, seniors, and minorities disproportionately impacted. Key barriers include high demand for resident amenities that increases building cost, limited zoning for multifamily development by-right, and a lack of older rental housing options to meet the needs of moderate to lower income rental housing. To improve housing equity and affordability for all, the Town should prioritize implementing the Affordable Housing Plan once it is complete.

Note: A household is considered cost burdened when more than 30% of its gross income is spent on housing costs.

GREATER EQUITY THROUGH HOUSING DIVERSITY

Throughout the public engagement process, the need for greater housing choices for middle- and lower-income residents was expressed, as well as for target demographics like young professionals, new families, minorities, and seniors. Smaller unit sizes and rentals are critical for providing housing options for residents who may not be able to afford owning a single-family detached home at their current stage of life or who wish to downsize. Higher density, smaller unit housing types will play an important role in addressing this need, increasing housing equity, inclusivity, and livability in Wake Forest.



RESIDENTIAL CHARACTER

While the Town works to accommodate its growing population, a balance must be met between preserving the existing residential character and supporting higher densities through a diverse mix of housing. Higher density residential does not need to be a dominating development that disrupts the Town's existing character. Through thoughtful design and attention to massing, rhythm, scale, setback, and building materials, new residential development can provide greater housing choice and equity while still complementing the charm of Wake Forest's established neighborhoods. This includes the following considerations:

Key Recommendations

- 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.

- Setbacks of infill development should match the existing context as much as possible as uniform setbacks can help foster a pedestrian-friendly environment.
- Promote higher density infill and redevelopment within older established neighborhoods to provide greater housing choices while matching the scale and character of existing properties.
- 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.
- 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.
- 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).
- Review and update the UDO to align with residential character recommendations within this Community Plan.





Example of a cottage home court | Source: Ross Chapin Architects

SENIOR HOUSING

The 65 and over cohort of residents has grown the most out of all age groups in Wake Forest over the last decade. It is critical that the Town supports this growing population with the housing, amenities, and services they need. Senior housing should be encouraged where community resources are available, particularly within walking distance, to reduce cost burden and the need to drive for daily routines and errands.

Universal Design

Universal design practices should be promoted to increase housing accessibility for residents of all ages and abilities. This should include level access from the street, zero entry thresholds, fixtures and fittings located at varying heights and widths, ground-floor master bedrooms, and other design elements that allow for lifetime homes. Smaller lot, single-story homes that require less maintenance and allow for downsizing should be encouraged, such as ranch style homes.

Key Recommendations

- Promote senior housing within a quarter mile of transit stops, Downtown, shopping areas, parks, and recreational facilities.
- Encourage smaller lot, single-story housing types for seniors that are ADA accessible.
- Encourage age-targeted cooperative housing types for community-oriented senior living, such as co-housing and cottage home courts.
- 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.
- 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.



Source: Asbury Place Maryville

COMMERCIAL DEVELOPMENT

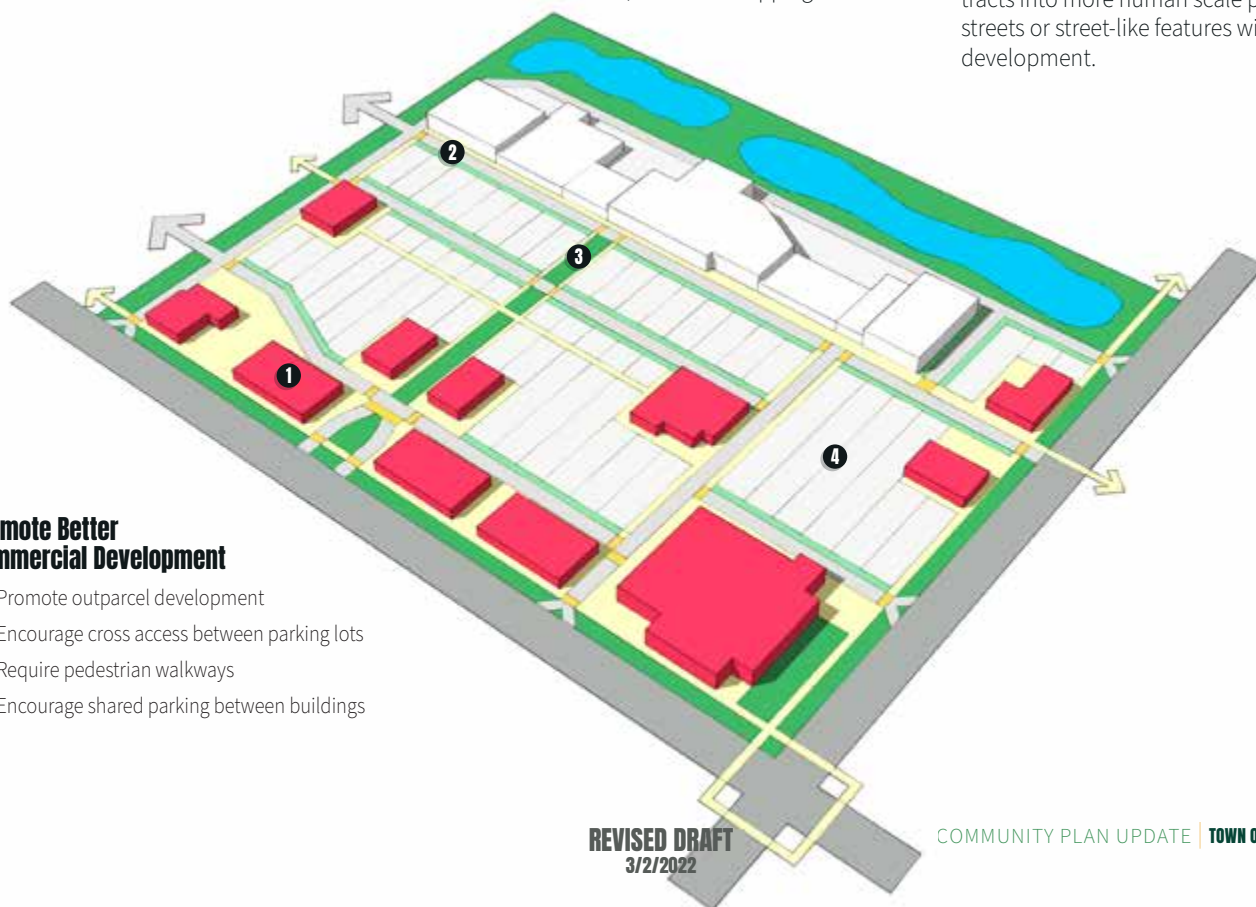
The character of commercial areas forms the overall image of a community. Commercial areas function as focal points of activity and are often what visitors see first and most often. Higher quality, attractive commercial areas can foster greater economic development by drawing new businesses and customers. During public engagement, community members stressed the desire to improve the character of the Wake Forest's commercial areas, avoiding "cookie cutter" development and strip malls that were monotonous in design. Instead, citizens aspired to see shopping areas that were memorable and unique to Wake Forest. The Town should consider the following to further improve the character, accessibility, and sense of place within its commercial areas:

Key Recommendations

- Enhance established commercial areas by incentivizing redevelopment and/or renovation of existing businesses.
- Support small, local businesses within commercial centers to support unique shopping options within Wake Forest.
- Establish architectural design standards for commercial building facades that promote quality design while allowing for flexibility that encourages creative design.
- Promote multi-story structures within Commercial Corridor and Neighborhood Commercial areas at appropriate scales that offer residential or office above ground-floor commercial.
- Encourage pedestrian-oriented shopping environments with sidewalks, attractive storefronts, and buildings facing each other to create a sense of enclosure.
- 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.
- Promote cross-access and pedestrian pathways between adjacent parking lots and leading to buildings to promote well-connected, cohesive shopping areas.
- Encourage the consolidation of commercial driveways onto major streets to reduce traffic conflicts.
- 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.
- Encourage businesses to replace existing, non-conforming signage with attractive signage that meets Town standards.
- Promote outparcel development to improve the character along primary roadways and break up views of large parking lots.
- 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.
- 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.
- 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.

Promote Better Commercial Development

- 1 Promote outparcel development
- 2 Encourage cross access between parking lots
- 3 Require pedestrian walkways
- 4 Encourage shared parking between buildings



MINORITY & WOMEN-OWNED BUSINESSES

It is important that Wake Forest cultivates a business environment that is welcoming to people of all backgrounds. The Town currently administers the Minority and Women-owned Business Enterprise (MWBE) Program, which is specifically designed to advocate and facilitate business growth and provide opportunities for historically underutilized businesses. The local Black Business Alliance also helps the Wake Forest Area Chamber create more equitable business environments and connect black business owners to resources and programs. The Town should continue to support and advocate for the minority and women business communities by doing the following:

Key Recommendations

- 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.
- Explore successful programs for supporting minority and women-owned businesses in surrounding communities to implement in Wake Forest.
- 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.
- Support informational sessions and/or provide educational resources to employers on how they can establish equitable work environments and policies within their businesses.

CASE STUDY NORTH HILLS SHOPPING CENTER

RALEIGH, NC

The North Hills Shopping Center in Raleigh, NC is an example of a pedestrian- and experience-oriented retail development that differentiates itself from traditional shopping centers and strip malls. Originally an aged shopping mall, the development was renovated with high-quality architecture, trees, pedestrian-scale lighting, and water features. A pedestrian-friendly environment is fostered through wide sidewalks lined with storefronts, outdoor seating, safe crosswalks, angled parking, and narrow drive lanes that slow traffic. Much of the parking is located underground, as opposed to large, front-loaded parking, which enhances the streetscape. Shopping centers with such features encourage visitors to spend more time and money by offering a unique experience in an attractive setting and should be encouraged within Wake Forest.



Source: Raleigh VIP



SETBACKS

Setbacks are the amount of space between a building and its property line. The placement of buildings can significantly affect the character of an area, including sense of enclosure, visual interest along the streetscape, and walkability. For example, a business situated close to the sidewalk becomes far more welcoming and accessible to a pedestrian than one set far back from the property line with a front-loaded parking lot. At the other end of the spectrum, wide setbacks can be used to effectively separate incompatible or high activity uses, such as light industrial uses from residential properties.

Key Recommendations

- 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.
- Promote consistency in setbacks within commercial and residential areas to form desirable continuity in the streetwall, or the facades of buildings facing the street.
- Encourage outparcel development with 360 architecture to “hold the corner” of commercial corridor development.
- Ensure adequate setbacks of industrial or other high intensity uses to reduce potential sound or visual impacts on adjacent lower intensity uses.
- 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).

PARKING LOTS

Parking lots are a key component for vehicular access; however, surface parking lots can detract from the character and walkability of an area if there is a parking surplus and/or if they are poorly designed. To create more welcoming environments for pedestrians while continuing to accommodate essential auto access, the following should be considered:

Key Recommendations

- 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.
- Require off-street parking to be located to the side or rear of the primary building.
- 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.

- Reevaluate minimum parking standards and consider implementing maximum parking standards to reduce excessive requirements.
- 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.
- Consider offering incentives for structured parking, such as density bonuses, allowable lot coverage increases, and height limit increases.
- Encourage the integration of structured parking into multifamily buildings to minimize surface parking lots.
- 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.
- Encourage the provision of pedestrian walkways in parking lots to enhance connectivity and safety to businesses.



Promote Better Parking Lots

- 1 Encourage cross access between parking lots
- 2 Locate parking behind the building
- 3 Require pedestrian walkways
- 4 Encourage shared parking between buildings



SCREENING & BUFFERING

Screening and buffering help improve the appearance of unsightly or high activity uses and mitigate their impact on neighboring properties. Screening includes the use of quality, opaque fencing, walls, and/or landscape to hide undesirable uses such as parking, loading, storage, or trash disposal areas from the public right-of-way and adjacent uses. Buffering provides distance to further separate incompatible uses and minimize impacts, such as noise, odor, or light pollution. In instances where higher intensity uses like industrial or corridor commercial are located next to lower intensity uses like single-family residential, screening and buffering should be utilized to provide visual and/or physical separation between such conflicting uses.

Key Recommendations

- 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.
- Encourage new development to preserve existing wooded areas along the perimeter of sites to provide natural buffering.
- Encourage screening of utility, loading, outdoor storage, and trash disposal areas that are visible from the right-of-way and adjacent development.
- 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.





COMMUNITY CHARACTER

Community character makes a place unique and sets it apart from other areas. Character is a combination of architectural design, size, scale, landscaping, street layout, street furniture, sidewalks, setbacks, and other elements that contribute to the appearance and feel of a neighborhood. The following recommendations are intended to help ensure Wake Forest remains distinguishable from other towns, where development has contextual interest, uniqueness, and variety. The intent is to promote, preserve, and enhance the character of the community without limiting development and redevelopment.

Key Recommendations

- 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.
- Curate public outdoor spaces for important monuments and artworks to showcase them as anchors and entry points to neighborhoods.
- Leverage historic structures, events, and people to create a sense of place through placemaking and branding.

- 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.).
- Encourage developers to incorporate landscaping to beautify neighborhoods and commercial areas, such as landscaped medians and roundabouts.
- Incorporate landscaping and gateway features into public rights-of-way, such as landscaped streetscapes, green infrastructure, and public promenades.
- Emphasize quality development along highly visible thoroughfares in the Town to reinforce its positive image.
- In accordance with the Land Use Plan, ensure incompatible, high intensity uses are directed away from low intensity residential areas.
- Continue to provide quality municipal services for the maintenance and upkeep of neighborhoods, such as street cleaning, snow removal, and trash disposal services.
- Work with NCDOT to identify areas for roadway enhancements.
- Refer to the Public Art Vision Plan for guidance when public art is being proposed in private development.
- 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.

UTILITY LINES

Utility lines provide crucial connections for residents and businesses, supplying electricity and telecommunications services. Today new developments routinely bury utility lines underground; however, many older areas of Wake Forest were developed with overhead utilities before this became a common practice. The poles and wires that support this critical infrastructure can be unattractive, add visual clutter, obstruct access, and be a safety concern depending on placement. While a costly endeavor, the Town should consider burying utility lines in priority areas over the long term as technology advances and redevelopment occurs. Conversion should focus on priority corridors that serve as gateways to the community, as well as key scenic spots and historically significant streets.

Key Recommendations

- Create a master plan for burying utility lines with community involvement to identify priority areas for conversion.
- Ensure major Town entrances and gateway corridors and highly visible, pedestrian-oriented areas are prioritized for conversion.
- Consider trenching utilities as capital improvements are made in the right-of-way for all areas of the Town.
- Investigate partnering with private developers to install conduit for fiber and/or burying utility lines in priority conversion areas.
- Explore partnerships with private developers for boring and burying additional conduit along main roadways.
- Consider and install conduit with greenway project construction.



HISTORIC PRESERVATION

The Town of Wake Forest is home to four historic districts which enhance its character. These districts include:

- **Wake Forest Local Historic District and Local Historic Landmarks** – This district is comprised of properties along N Main Street, North Avenue, and South Avenue. Designated in 1979 under the Town's Historic Preservation Ordinance, exterior changes to properties within this district and designated local historic landmarks must receive a Certificate of Appropriateness from the Historic Preservation Commission.
- **Wake Forest National Register Historic District** – This district is centered around the original campus of Wake Forest College and includes the houses, churches, and businesses that grew around it. The district was listed in the National Register of Historic Places in 2003. Properties within this district may be eligible for historic tax credits for qualified rehabilitation projects and are protected by the Town's Demolition of Historic Structures Ordinance; however, they are not required to receive approval from the Historic Preservation Commission for exterior changes.

- **Glen Royall Mill Village** – This district bounded by the CSX railroad, Mill property, N Main Street, and E Cedar Avenue is one of the most intact mill villages in the state. The district was listed in the National Register of Historic Places in 1999. Properties in this district may be eligible for historic tax credits for qualified rehabilitation projects and are protected by the Town's Demolition of Historic Structures Ordinance and Glen Royall Mill Village Character Overlay District. However, they are not required to receive approval from the Historic Preservation Commission for exterior change.
- **Downtown Wake Forest National Register Historic District** – This district includes structures that contributed to the Town's historic commercial core along S White Street from Roosevelt Avenue nearly to Owen Avenue. The district was listed in the National Register of Historic Places in 2002. Properties within this district may be eligible for historic tax credits for qualified rehabilitation projects and are protected by the Town's Demolition of Historic Structures Ordinance. Exterior changes must meet the Secretary of Interiors Standards for Rehabilitation under the UDO 5.2.1.

The designation of historic districts helps the Town safeguard its heritage and preserve areas of historical, cultural, and architectural significance. Historic districts also contribute to stabilizing and improving property values as well as strengthening the local economy by attracting tourism. The Town of Wake Forest should continue to preserve, maintain, and enhance these historic districts as a major community asset.

Key Recommendations

- 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.
- Continue to enforce the Historic Preservation Ordinance for the Wake Forest Local Historic District and local historic landmarks.
- 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.
- Ensure development surrounding and within historic districts is sensitive to the historic context of the neighborhood.
- Encourage adaptive reuse, restoration, and repurposing of historic structures to preserve Wake Forest's history.
- Continue to enforce the Demolition of Historic Structures Ordinance for the protection of all historic properties in Wake Forest.
- Investigate the adoption of new local historic districts or character historic overlay districts to preserve Wake Forest's historic character.



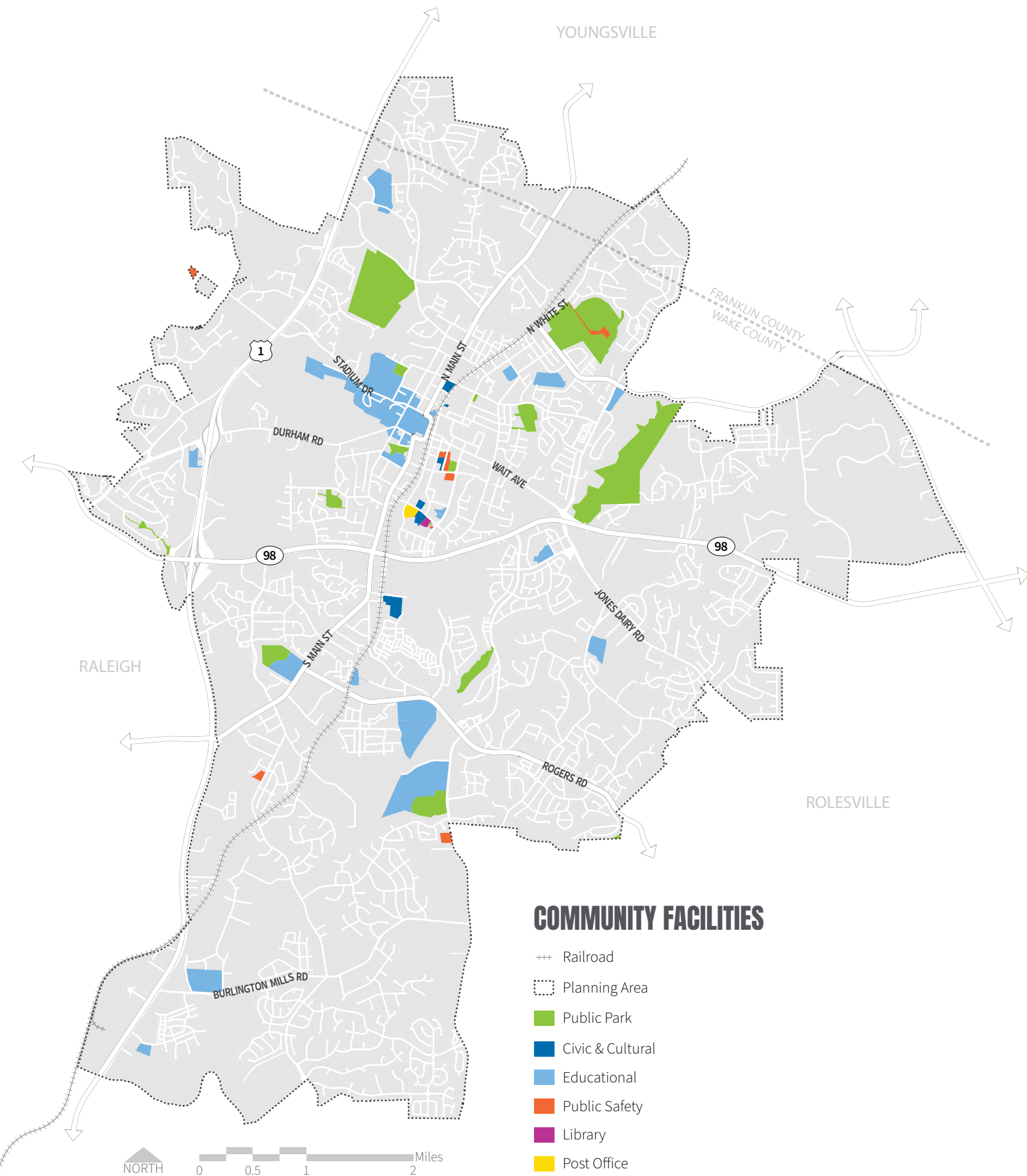
COMMUNITY FACILITIES

As Wake Forest continues to grow, so too will the demand for community services and facilities, including infrastructure, libraries, schools, recreational amenities, and public safety services. As the needs and desires of residents change over time, the Town should plan ahead for increases in service demands and need for new amenities. Long-term planning and coordination with respective service providers will be key to ensuring the efficient and equitable distribution of new and expanded facilities and services.

Key Recommendations

- Expand Town facilities concurrently with new growth.
- Annually review the Town's Work Management Plan, Staffing, and Budget section to reflect current needs and priorities.
- 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.
- Work with the Wake Forest Parks, Recreation, and Cultural Resources Department to expand equity in the quality of public park facilities and programming.

- Explore green infrastructure options that also beautify spaces, like bioswales and planters.
- Continue to work with regional educational entities to provide support as they seek new facility locations or expansion with growth.
- Coordinate with regional educational entities to ensure increased equity in educational facilities across the community.
- Coordinate with the Police and Fire Departments to ensure response times are sufficient for all areas of town with growth.
- Consider emerging best practices for community safety, such as mental health crisis response teams.
- Promote and incorporate sustainable building practices into community facilities, setting a precedent for private developers to implement.
- Coordinate with regional healthcare providers to explore opportunities to locate a full service hospital or regional medical facilities in the Town.
- Explore revising the street calming policy or UDO updates related to traffic calming consideration when reviewing development proposals.
- Regularly update the Town Pavement Management System program.





PUBLIC TRANSIT

Public transit is important for providing more sustainable transportation options and for helping increase connectivity throughout the Town and to nearby communities like Raleigh. Transit decreases the number of cars on the road, which reduces congestion and greenhouse gas emissions, improves air quality, and frees up land for uses other than parking. Transit also provides equitable and affordable transportation alternatives, which is particularly important for residents who may not have access to a personal car or are unable to drive due to medical conditions, disabilities, or young age.

Bus Services

Wake Forest is currently served by two bus lines provided by GoRaleigh and GoTriangle:

- **Wake Forest Loop (WFL)** – a free circulator bus route that serves neighborhoods around Downtown, S Main Street, Stadium Drive, and the service roads west of US 1.
- **Wake Forest Raleigh Express (WRX)** – a commuter bus service connecting to Downtown Raleigh running hourly service during peak hours.

COMPREHENSIVE TRANSPORTATION PLAN

This Additional Considerations chapter provides a high level overview and recommendations for transportation and mobility within Wake Forest. For more detailed information and recommendations, see the Wake Forest Comprehensive Transportation Plan (CTP).

A new bus line, Route 2L, is planned by GoRaleigh, which would provide hourly service from Downtown Wake Forest to WakeMed North Hospital in Raleigh. This route will be funded partially by the Wake County Transit Tax, which was approved by Wake County voters as a half-cent sales tax to improve transit services in the region.

Key Recommendations

- 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.
- 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.
- 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.
- Explore incorporating public art into bus shelters.
- Continue to evaluate and coordinate Park and Ride locations with transit partners.
- Explore best long term transit options such as fixed or microtransit.



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S-LINE

The S-Line is a rail corridor that is being considered for local commuter rail service and regional intercity passenger rail service along the planned Southeast High-Speed Rail Corridor. Local connections would include Wake Forest, Apex, Cary, and Raleigh among others, with direct regional connections to Washington D.C. and Richmond, Virginia.

Direct access to the S-Line with stations in Wake Forest could open significant opportunities for the Town in terms of population, land use, economic development, and tourism. This rail connection could accelerate the population growth within the Town, increasing demand for housing, municipal services, employment opportunities, and more. New train stations would also make Transit Oriented Development (TOD) a viable option in the immediate vicinity, meeting much of the demand for new housing while creating a more walkable community.

Additionally, the S-Line could boost tourism within Wake Forest by significantly improving both regional and local access. Tourism combined with more business-related travelers in the area can have a positive local effect on economic development. The Town should continue to work with NCDOT in coordinating the project and plan for TOD around future stations.





CAPITAL BOULEVARD

Capital Boulevard or US 1 is the Town's primary roadway that cuts north/south through Wake Forest. It is where much of the community's commercial corridor development has occurred, yet much land has remained undeveloped due to the uncertainty of North Carolina Department of Transportation's (NCDOT) plans for roadway designs. Anticipated to start in October 2024, the US 1 Conversion Project (U-5307) will convert the roadway into a controlled-access highway from I-540 to Harris Road/Purnell Road in Wake Forest. At-grade and signalized intersections at Burlington Mills Road, S Main Street, Dr Calvin Jones Highway, Durham Road, and Stadium Drive will be removed and converted to interchanges or grade-separations, with access provided by service roads along US 1 on either side. Once completed, the conversion will address existing congestion issues and open major opportunities for growth along Capital Boulevard.

Key Recommendations

- Continue to work closely with NCDOT to implement the project and promote commercial growth in accordance with the Land Use Plan.
- Continue advocating for improvements along the corridor to assist in improving the quality of life for Wake Forest residents, businesses, and property owners.





STREET CONNECTIVITY

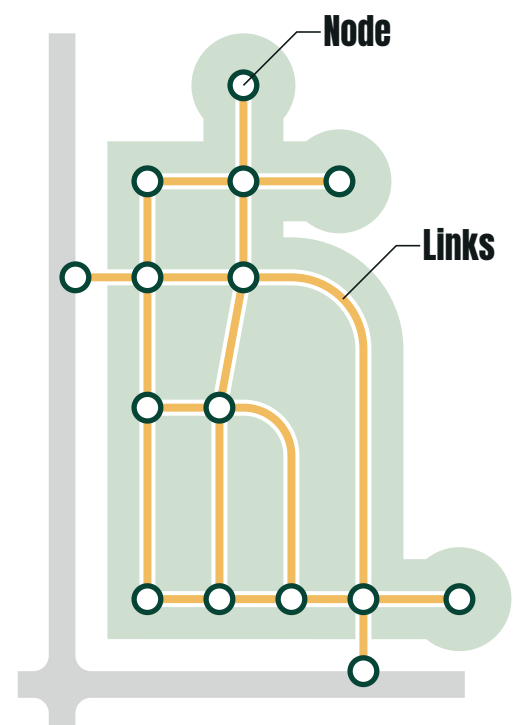
Much of Wake Forest's residential areas feature a curvilinear roadway system with cul-de-sacs common to suburban development patterns. This configuration reduces connections between neighborhoods and major roadways and increases dependency on automobiles. While this can achieve some privacy for residential properties, it contributes to congestion by increasing distances and travel times between destinations and creating bottlenecks during peak travel times. The goal of new development should be to create a road pattern that more closely resembles a grid while allowing for curvature in the road. This would, increase the number of intersections, improve ease of navigation, reduce walking distances, and decrease vehicular travel times—including the response times of emergency services.

Connectivity Index

To improve traffic management and community connectivity, the Town should consider establishing a connectivity index minimum requirement for all new residential subdivisions. A connectivity index measures the ratio of the number of blocks (links) to the number of intersections (nodes) in the street network. A higher connectivity index reflects a greater number of blocks entering each intersection, and thus a higher level of connectivity for the neighborhood. Connectivity indexes typically fall within the range of 1.2 to 1.4.

Key Recommendations

- Promote short blocks of less than 600 linear feet between intersections of local roads to improve walkability.
- Avoid dead-ends, cul-de-sacs, and T-intersections in places where four-way intersections can be aligned.
- Study the appropriateness of traffic circles at four-way intersections to ease congestion and improve safety.



Connectivity Index Calculation

Links: 19

Nodes: 15

Connectivity Index: $19 / 15 = 1.26$



SIDEWALKS & MULTI-USE PATHS

Sidewalks and multi-use paths are critical to pedestrian and bicycle connectivity and promote community interaction and active lifestyles. They connect neighborhoods and provide safe routes to shopping areas, schools, and other key destinations. Historically, Wake Forest developed without sidewalks outside the central business district. While the sidewalk and multi-use paths network has grown over recent years, many gaps still exist and there is an opportunity to connect smaller clusters of existing networks. In coordination with the CTP, the Town should continue to expand its sidewalk and multi-use path network to provide a comprehensive and accessible system. This may require future acquisition of land to construct public sidewalks and paths.

Key Recommendations

- 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.
- Update the CTP to identify priority areas for high visibility crosswalks, bulb outs, refuge islands, rectangular rapid flashing beacons, and other pedestrian improvements.
- Work with Public Works to identify crosswalk ramps that are not ADA compliant and prioritize upgrades.
- In coordination with roadway improvements, upgrade aging sidewalks or install new sidewalks if none exist.
- Promote sidewalk, multi-use path, or trail connectivity between residential subdivisions and nonresidential development to improve pedestrian and bicycle connectivity.
- Continue to ensure all new residential development provides sidewalks on both sides of the street.
- Encourage multi-use paths to be provided along the main road in developments.
- Ensure multifamily and commercial developments include strong pedestrian networks within and between their sites.



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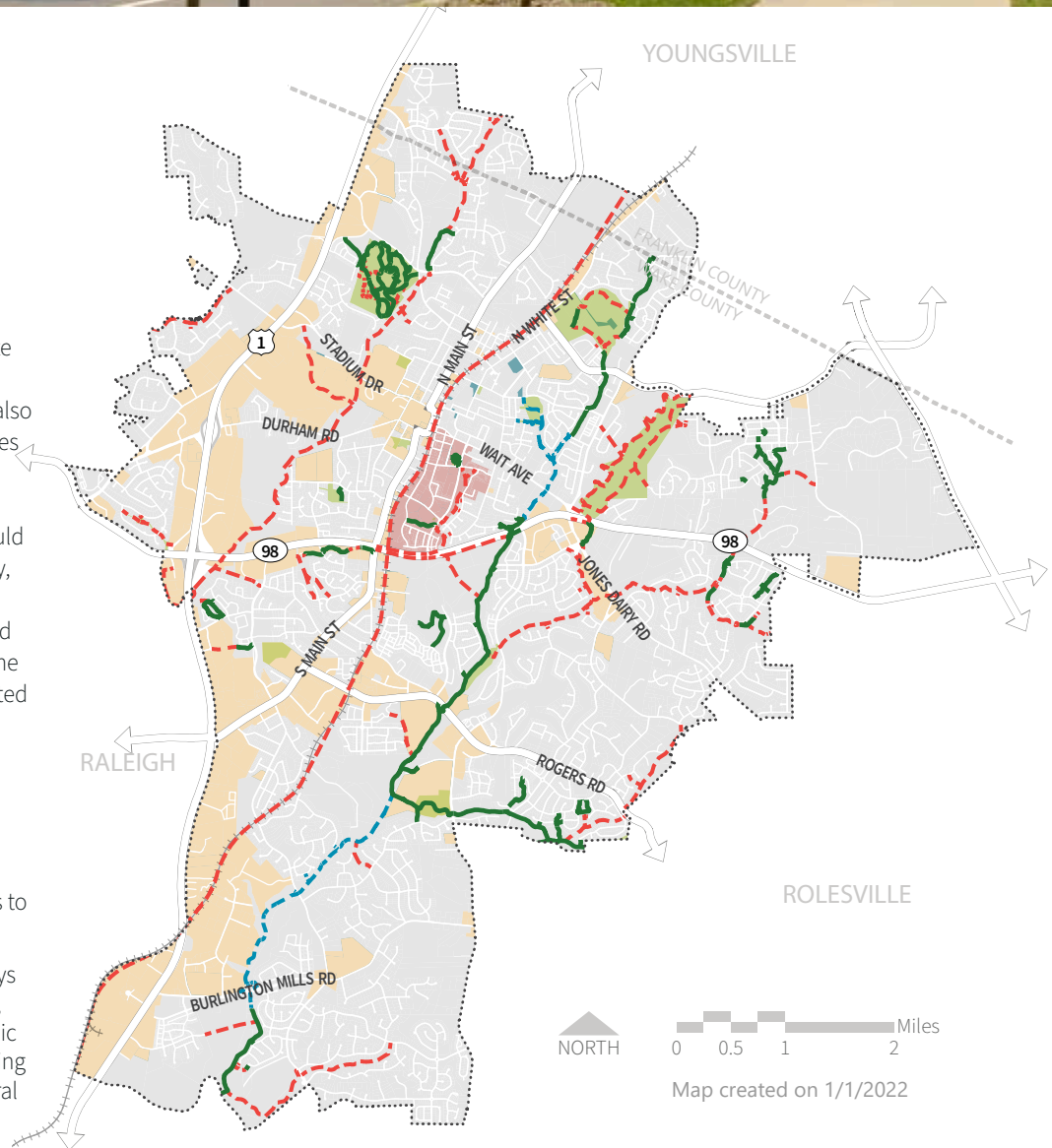


BIKEWAYS, GREENWAYS & TRAILS

Like sidewalks and multi-use paths, bikeways, greenways, and trails contribute significantly towards mobility for active transportation within Wake Forest. They also provide outdoor recreational opportunities and connect residents and visitors to local and regional natural amenities. In coordination with the CTP, the Town should continue to expand its bikeway, greenway, and trail network across the community. This may require future acquisition of land to construct publicly accessible routes. The expanded network should also be marketed as a tourism asset to draw visitors to the community.

Key Recommendations

- Identify trail head locations as the greenway and trail network continues to expand.
- 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.
- Encourage development along greenways to incorporate greenway access into the site, particularly for uses attractive to trail users (i.e. restaurant, cafes, and bars).



GREENWAYS

- Planning Area
- ++ Railroad
- Existing Greenway
- - - Planned Greenway
- - - Proposed Greenway

- Public Park
- Downtown
- Shopping & Employment Area
- Community Facility



LOCAL FOOD SYSTEMS

A food system comprises of food production, processing, distribution, consumption, and waste management. Such activities are rooted in the community in a local food system and help address food insecurity in addition to supporting the local economy. Local food systems can help connect local farmers directly to consumers boosting income, providing employment opportunities as well as access to fresh food. To promote local food system and support the local food economy, the Town should pursue the following recommendations:

Key Recommendations

- Continue to support the Northern Community Food Security Team and together explore other locations for community food hubs within the Town.
- Partner with local food cooperatives and regional food networks, such as the Capital Area Food Network, to address food insecurity in the community.
- Encourage regenerative practices, such as use of organic fertilizers, crop rotation, and crop variation for healthy soil.
- Conduct a meal gap survey to better assess the immediate and long term needs in the community.
- Evaluate the economic impact of local food systems in the community to encourage localized marketplaces for food producers.
- Explore updates to the UDO that would promote urban agriculture and repurposing of vacant or underutilized lots for such uses.



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CONSERVATION DESIGN

An effective approach the Town can take to preserve and protect green space is to promote conservation design subdivision development. Conservation design is where residential development is concentrated into developable areas of the property to preserve contiguous areas of open space and environmentally sensitive areas. The clustering of homes allows larger areas of green space to be preserved, which can be enhanced as common open spaces or parkland. This approach can also help protect wetlands, floodplains, wildlife habitats, and other environmentally sensitive areas.

Key Recommendations

- Encourage conservation design in the UDO's subdivision development regulations, particularly for areas within watershed protection areas.
- 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.
- Encourage developers to enhance preserved green spaces as accessible amenities for residents, such as trails and outdoor seating.



Typical Subdivision

- 24 Lots
- Minimum Lot Size: 1 to 2 acres
- No Undivided Open Space



Conservation Design

- 24 Lots
- Lot Size Range: less than one acre
- 50% Undivided Open Space



GREEN SPACE PRESERVATION

During public engagement, community members voiced concern for preserving green spaces and forested areas in the face of ongoing growth. Green space and natural resources are valued by the community as they add to the character of the Town, mitigate stormwater runoff, and support wildlife and their habitats. While much of these natural areas exist within undeveloped private properties that the Town has limited control over, there are strategies the Town can implement to promote the preservation of valued green space and protection of wildlife.

Key Recommendations

- Prioritize higher density redevelopment and infill development within already developed areas to avoid premature development in long term growth areas and reduce greenfield development.
- 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.
- Continue to identify and strategically acquire environmentally sensitive land to preserve as dedicated conservation areas and publicly accessible open space.
- 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.
- 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.
- Explore strategies to further protect wildlife and environmentally sensitive areas in the UDO.





TREE CANOPY

A tree canopy provides numerous advantages for a community, including enhancing its character, cleaning the air, conserving water, and cooling urban heat islands. Tree canopies can also increase property values and economic vitality due to its direct positive effect on neighborhood appearance and desirability. The Town is responsible for maintaining about 14,700 street trees, 630 acres of forests, and more than 1,000 maintained trees in parks and on Town property. Wake Forest has also been designated as a Tree City USA by the Arbor Day Foundation since 1979 due to its dedication to preserving the urban tree canopy. To continue to promote tree preservation, the Town should pursue the following recommendations:

Key Recommendations

- Continue to support the Town in administering the Urban Forestry Program and planting, preserving, and maintaining trees on public properties and rights-of-way.
- Explore updates to the UDO that could further promote tree preservation and replacement in new developments.
- Review existing incentives and consider additional incentives for private developers to promote tree preservation above what is required by the UDO.
- 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.
- 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.
- Coordinate efforts to influence State regulations related to the expansion of tree preservation standards.





SUSTAINABLE DEVELOPMENT

As Wake Forest continues to grow, it should strive to set itself apart in the region as a community committed to sustainability. By supporting a healthy, sustainable environment and promoting green development practices, the Town can help ensure the well-being of residents and the protection of its natural assets for generations to come.

Adaptive Reuse

Adaptive reuse is the method of repurposing or “recycling” an existing structure for a new use other than for what it was initially intended for. Adaptive reuse can be used to bring life to aged, underutilized, or disinvested buildings in the community that are still structurally sound and feature desirable built form. It can also be leveraged to preserve Wake Forest’s historic structures and heritage while supporting new, activated uses.

Green Buildings

Green buildings are buildings that are designed to reduce or eliminate negative impacts on the environment and human health. They are efficient structures that reduce the resources used (energy, water, and materials) through improved siting, design, construction, operation, maintenance, and removal. Leadership in Energy and Environmental Design (LEED) Certifications are awarded to development that meets the sustainability standards of the Green Building Rating System.

CASE STUDY WEST GEER STREET

DURHAM, NORTH CAROLINA

Located at the edge of Downtown Durham, West Geer Street between Foster Street and Madison Street features successful examples of adaptive reuse. Many seemingly obsolete buildings like former auto repair shops or industrial buildings were repurposed into trendy new restaurants, lounges, and bars with façade art and outdoor patios. Through repurposing older structures, the area was able to retain much of its original gritty character, while reinvestment stimulated new energy and activity into the area. Nearby apartment buildings also contribute to resident foot traffic and the economic viability of the area. A similar approach should be considered for repurposing existing auto-oriented structures along S White Street, such as unique food and drink establishments and collaborative workspaces.





Low Impact Development

Low Impact Development (LID) is the integration of green infrastructure and conservation of on-site natural features to mitigate stormwater runoff and protect water quality. Green infrastructure is an attractive and sustainable alternative to traditional concrete (or “gray”) infrastructure that substitutes paved and hard surfaces with vegetated or permeable areas. It has numerous environmental benefits on top of stormwater management, including reducing urban heat islands, improving air quality, and promoting economic vitality through attractive urban settings. Examples include incorporating permeable surfaces, xeriscaping, grassed swales, rain gardens, bioretention strips, and green roofs into parking lot, streetscape, and building designs. Native and locally adapted vegetation should be encouraged to support LID, pollinators, and wildlife habitats.

Key Recommendations

- Encourage private developers to incorporate green building, LID, and green infrastructure practices in future developments.
- Incorporate green infrastructure into public streetscapes, prioritizing pedestrian-oriented areas like Downtown, TOD, and Neighborhood Commercial areas.
- Continue to incorporate sustainable design best practices into Town-owned infrastructure and community facilities, striving to incorporate LEED practices into future facilities.
- 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.
- Evaluate potential rainwater collection programs and composting programs.
- Explore an incentive program to encourage development to provide stormwater when lots are exempt from stormwater requirements.
- Update the Manual of Standard Specifications and Details (MSSD) to reference green infrastructure design.
- Explore decommissioned rights-of-way as potential stormwater routes.
- Support the use of attractive, safe, and sustainable street furniture and infrastructure, such as solar streetlights, and LED traffic lights.
- 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.
- 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.
- Develop a solar energy ordinance and enroll 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.
- 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.
- Continue partnership with Raleigh to encourage homeowners to incorporate practices for water conservation.



TOURISM

Tourism is an important asset to a community as it draws new visitors to the area to spend time and money and enhances the community's reputation and identity. Tourism can be a tool for economic development, increasing local tax revenues and job opportunities for tourism-based industries. Wake Forest offers many assets that can be leveraged for tourism, including the historic Downtown, the Renaissance Centre, parks and greenways, and the Wake Forest Historical Museum. Heritage tourism can also be promoted based on the Town's historic districts and structures, such as the Ailey Young House. In addition, the future S-Line passenger rail service also presents major potential to provide an entryway for thousands of visitors each year to travel to and through Wake Forest, improving the economic viability of activity centers and hotels in the area.

Destination 2028

Destination 2028 is a strategic plan led by the Greater Raleigh Convention and Visitors Bureau with the goal of attracting 21.7 million visitors to Wake County annually. In this plan, shopping and retail experiences are identified as one of the main reasons people visit Wake County, and Downtown Wake Forest is specifically referenced as a key destination. The County as a whole is experiencing growth in tourism, driven by Raleigh-Durham International Airport, higher education institutions, business and research centers, and other leisure and cultural opportunities. The Town should leverage these resources to ensure Wake Forest capitalizes on this momentum for many years to come. Destination 2028 should be used as a guiding document to understand how coordinated private and public investments in Wake Forest and neighboring areas can complement each other and contribute to a cohesive regional tourism identity.

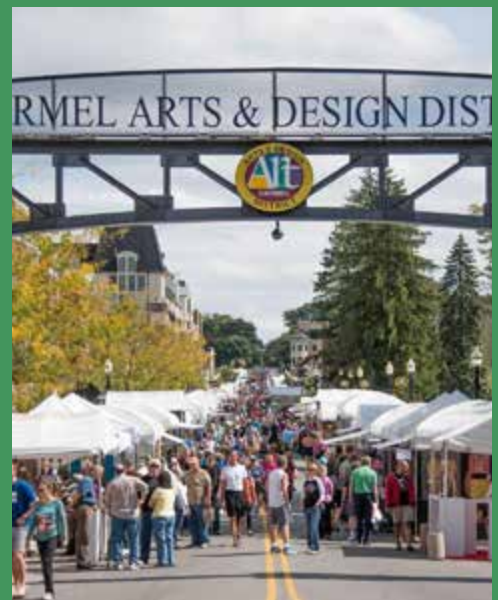
Arts & Culture

Wake Forest enjoys an active arts community that, with the right support, could help turn the Town into a regional arts destination. Downtown features a cluster of galleries, studios, and art shops along S White Street, including the Renaissance Centre for the Arts. These establishments are within walking distance of each other, making coordinated events or arts-centric neighborhood branding an opportunity. The Factory, located on South Main Street, offers another cultural draw to Wake Forest as both a shopping center and sports and entertainment complex. The Town should supplement these various cultural assets with decorative signage, gateways, public murals, and sculptures, as well as establish recurring and special events to activate parking lots and public spaces.

CASE STUDY ARTS & DESIGN DISTRICT

CARMEL, INDIANA

Carmel, Indiana is a city located just north of Indianapolis whose tourism is bolstered by its own Arts and Design District. The District features a cluster of art galleries, interior designers, showrooms, antique stores, a design center, and specialty retail stores immediately surrounded by residential uses. The District is further activated by recurring festivals focused around art, wine, food, and music. Decorative brick sidewalks and crosswalks, fountains, decorative lighting, and plentiful outdoor seating all help achieve a cohesive, memorable sense of place. Brewpubs, restaurants, and higher density residential buildings help ground the District as a neighborhood that is financially robust at all times of the day and year. The Arts and Design District has helped the City earn the ranking of the best place to live in the United States for two years in a row by data company Niche.





Placemaking

Placemaking helps define a community's identity and contributes to a unique sense of place that differentiates it from other areas of town and the region. Placemaking combines branding, beautification, and functional infrastructure to create new draws to the community, encouraging formal and informal social interactions. Examples of placemaking efforts by the Town include banner signs, decorative streetlights, planters, and public art on Jones Avenue and S White Street in Downtown. The Town should continue these efforts to incorporate placemaking elements. Public gathering spaces such as plazas and parklets should be used in combination with decorative signage and lighting, seating areas, planters, and other beautification elements to create cohesive and inviting destinations.

Key Recommendations

- Grow the Town's art community and reputation as a regional arts destination with a Downtown focus.
- Explore the potential of constructing a recreational destination facility with a regional draw.
- 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.
- 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.
- 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.
- Create a community-wide wayfinding plan to improve sense of place and signage that directs visitors and residents to Town destinations.
- 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.
- 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.
- Investigate hiring consultants to provide a comprehensive evaluation of Town events and provide recommendations for improved programs.
- Explore the creation of a social district, where customers can carry and consume food and drinks purchased from businesses outside in a designated zone.

CASE STUDY RIVER DISTRICT

DANVILLE, VIRGINIA

Danville, Virginia is a city located approximately 40 miles northwest of Greensboro, North Carolina that has done a commendable job branding itself for tourism and development. In 2013, the City released design guidelines for a new River District that covered aspects like historic and new buildings, sidewalk dining, outdoor displays, signage, awnings, streetscaping, open space, and maintenance. In 2015, the City launched a new branding strategy for the River District with a logo and modern color scheme—this is featured on the numerous banners that line the District's streets and on wayfinding signage that points visitors towards key destinations and routes. The River District is further completed with new sidewalks with brick pavers, decorative lamps, benches, landscaping features, public Wi-Fi, a plaza, bike parking, and a trailhead. The City also offers economic incentives in the form of grants, loans, and fast-track permitting processes, and tax incentives for historic renovations, job creation, niche retailers, upscale restaurants, and unique eateries.



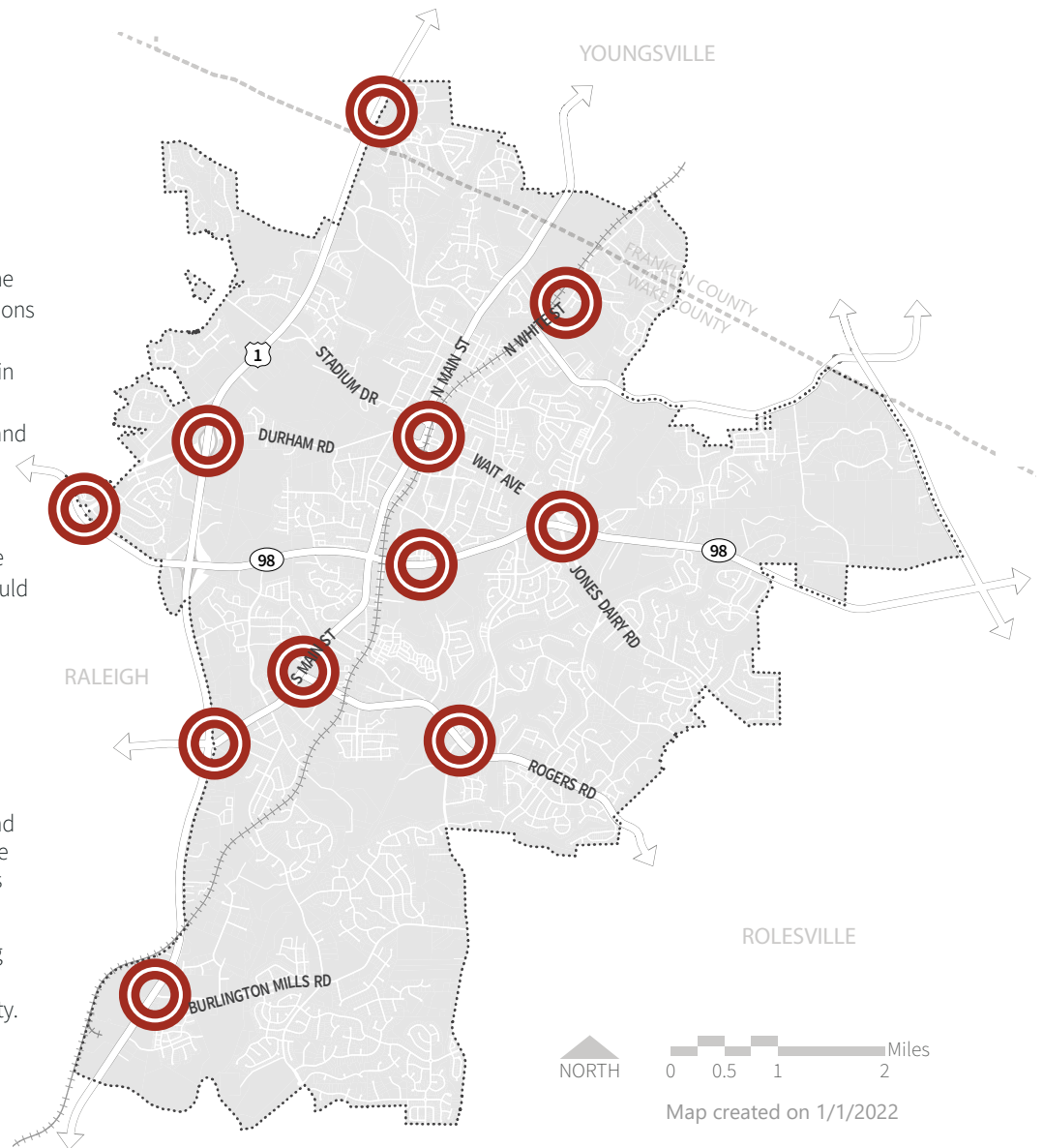


GATEWAYS

Major thoroughfares and intersections present opportunities to create gateways that welcome residents and visitors into the community. Wake Forest has several locations where gateways could be constructed to improve aesthetics and present the Town in a positive light, such as the intersection of South Main Street and Capital Boulevard and key entry points into Downtown. Gateway features could include decorative archway signs, monument signs, public art, and/or landscaping. Disinvested or unattractive buildings surrounding gateway points should be prioritized for improvement through redevelopment, rehabilitation, screening, and/or landscaping.

Key Recommendations

- 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.
- Improve roadway infrastructure along key gateway routes to enhance their character and multimodal connectivity.



GATEWAYS

- Potential Gateway
- Planning Area
- ++ Railroad



Renaissance Plan

for Downtown Wake Forest, NC

SEPTEMBER 2017

DOWNTOWN WAKE FOREST

While this Downtown Area Plan (see page 58) provides guidelines for land use and development within Downtown, the Town's Renaissance Plan provides more detailed recommendations for reinvestment, economic development, marketing, programming, parking, and streetscaping. The Renaissance Plan was adopted in 2017 but should be updated to ensure it reflects current development potentials and responds to the existing and future needs of the community. Conformance with the Downtown Area Plan should be reviewed. This may include reducing the Renaissance Plan study area boundary to focus on the Downtown Core Area.

Key Recommendations

The Renaissance Plan update should address the following Downtown Considerations:

- **Increase Density** – evaluate existing zoning regulations around density in appropriate locations to balance Downtown's development potential with preserving its historic character.
- **Thoughtful Downtown Infill** – identify strategies to fill vacant buildings Downtown that promote an entrepreneurial and small-business culture.
- **Attractions for All** – identify strategies to attract families and younger populations to Downtown with inviting public spaces, entertainment, and destinations for all ages.
- **Building Orientation** – provide guidelines for how buildings should be orientated to support pedestrian-friendly environments.
- **Parking** – reassess parking demand and supply with consideration for a new parking garage(s) to minimize surface parking lots.
- **Downtown Experience** – identify strategies to create an “experience-based” Downtown retail environment with unique local businesses and a pedestrian-oriented environment.
- **Gateways & Wayfinding** – reassess strategies to improve gateways and wayfinding to and within Downtown to better direct people and create a distinct sense of place.
- **Community Events** – identify opportunities for Downtown events and public gathering spaces to bring the community together, such as live outdoor events and festivals.

5 Implementation

To ensure the vision and goals of the community are attained, proactive implementation of the Wake Forest Community Plan is essential. The Plan provides policies and recommendations the Town should undertake over the next 10 to 20 years for the vision to be realized. Close coordination with and participation of local departments, regional public agencies, neighboring communities, community groups and organizations, the business community, property owners, developers, and residents will be key in the success of its implementation. The following chapter provides best practices on how to use the Plan as well as funding sources to consider.



NEXT STEPS

The following actions and strategies establish the “next steps” to be taken after the adoption of the Wake Forest Community Plan. They will provide for the effective application of the Plan and continued community planning and investment, and ensure the Plan remains reflective of community needs and aspirations. They include:

- Reference the Community Plan on a regular basis to guide Town policies and decision-making.
- Review and update the Unified Development Ordinance and other development controls to reflect policies presented in the Wake Forest Community Plan.
- Update and incorporate the Capital Improvement Plan (CIP) with Plan recommendations for CIP infrastructure improvements.
- Promote cooperation and participation among various agencies, organizations, community groups, and individuals.
- Regularly review and update the Plan to reflect current conditions and shifts in community priorities.
- Establish meaningful partnerships with internal and external organizations and agencies.
- Explore possible funding sources and implementation techniques.

Reference the Plan Regularly

The Community Plan should be referenced regularly as the official policy guide for planning decisions made by Town staff, the Board of Commissioners, and the Planning Board. It should be used as a primary resource to assist with policy formation, prospective projects, legislative and quasi-judicial development proposals, and planning initiatives, ensuring that future decisions are in line with the Town’s set goals for land use and development. Further, service providers and partner organizations should be encouraged to use the Plan when considering new development, facilities, infrastructure updates, and programming within their parameters. The Plan should be used to:

- Evaluate and shape policies and regulations.
- Work with partner agencies and service providers.
- Review and evaluate development proposals.
- Prioritize public expenditures.
- Encourage private sector investment.
- Coordinate new facilities, infrastructure, and programming.

Development Regulations

While the Wake Forest Community Plan articulates a vision for the community, the Town’s development regulations are one of the primary tools that can be used to implement Plan recommendations. Following adoption of the Community Plan, the Town should consider a process to update the current Unified Development Ordinance to ensure that regulations reflect current Town policy and the desires of the Wake Forest community. Amendments to development regulations and design standards should consider complementary programs and incentives that can be used to achieve the community’s vision for economic development, neighborhood character, connectivity, and other aspects of the Plan.



Capital Improvement Plan (CIP)

It is important that the implementation of the Wake Forest Community Plan is coordinated with the Town's financial resources and capital planning. This will help ensure future capital investments successfully address both short- and long-term objectives of the Plan and are strategically budgeted and prioritized. CIP projects include improvements for the maintenance of Town assets such as roadways, sidewalks, multi-use paths, stormwater maintenance, public art, as well as other improvements requiring capital expenditures relating to public infrastructure.

The Town should review and integrate the Wake Forest Community Plan into the capital improvement process, including the Town's annual budgeting process and during updates to the CIP. This will help assess funding needs and plan for potential sources, ensuring completion of desired improvements in a prioritized manner over the life of the Plan.

Local & Regional Cooperation

To ensure the success of the Community Plan's implementation, there must be strong leadership from the Town and coordination with other public agencies, neighboring communities, community groups and organizations, the local business community, the private sector, and other key stakeholders. As many of the recommendations included within the Plan pertain to issues extending past Town and ETJ limits, such as water quality or roadway connectivity, regional cooperation will be key in addressing them.

Regular Updates

The Wake Forest Community Plan is not a static document, and it is intended to evolve with shifts in trends, issues, and opportunities. If community attitudes change or new challenges arise which are beyond the scope of the current Plan, the Plan should be revised and updated accordingly. Although a proposal to amend the Plan can be brought forth by petition at any time, the Town should systematically review the Plan annually and evaluate updating every five to seven years.

Ideally, the review and preparation of the Plan's annual action agenda should coincide with the preparation of the Town's budget and CIP. In this manner, recommendations or changes relating to capital improvements or other programs can be considered as part of the commitments for the upcoming fiscal year. Routine examination of the Plan will help ensure that the planning program remains relevant to community needs and goals.

PARTNERS

Wake Forest's regional position makes it essential that the Town develops and maintains partnerships with a wide variety of groups and organizations. Facilitating regular communication and cooperation with partners will support implementation of the Land Use Plan and identify opportunities to work collaboratively toward mutual interests. Further, it will facilitate a greater regional perspective in how issues are addressed in the area.

Wake Forest already has a wide variety of partnerships, which should be maintained in the future. Possibilities for new partnerships with organizations and agencies should be identified by the Town to aid implementation. This could include neighboring municipalities, regional and state agencies, neighborhood groups, the local business community, and other groups with a vested interest in Wake Forest.



POTENTIAL FUNDING SOURCES

The following is a list of possible funding sources that the Town could pursue to fund the implementation of the Wake Forest Community Plan.

Affordable Housing

- Low Income Housing Tax Credit Program (LIHTC)
- Community Development Block Grant (CDBG)

Economic Development

- General Economic Development
- Municipal Service District (MSD)
- Triangle J Council of Governments Economic Development District (EDD)
- Local Discretionary Grants
- Incubators
- Community Development Financial Institutions Fund (CDFI Fund) – New Market Tax Credits
- Debt vehicles-GO Bonds
- Certificates of Participation (COPs)
- Special Obligation Bonds (SOBs)
- Federal grants, such as from the Environmental Protection Agency (EPA) and United States Department of Agriculture (USDA)
- Foundations
- U.S. Economic Development Administration
- Competitive utility rates utilizing coincident peak structure

Job Creation & Capital Investment

- Wake County Business Development Grant
- Job Development Investment Grant (JDIG)
- One North Carolina Fund (One NC)
- North Carolina Small Business Center Network (SBCN)
- North Carolina Small Business Technology and Development Center (SBTDC)
- North Carolina Biotechnology Center Economic Development Award
- Small Business and Innovative Research (SBIR) Program

ACTION MATRIX

The Implementation Action Matrix offers a comprehensive list of all implementation strategies, policies, and recommendations contained within the Wake Forest Community Plan. The matrix provides Town staff with a tool to prioritize implementation activities and projects over the life of the plan. In addition, the matrix allows the Town to approve specific, actionable items on an annual basis and evaluate progress based upon completed implementation strategies.

While partners are not identified for each action item in the Action Matrix, the Town may partner with a number of agencies, non-profits, and private entities to achieve the objectives of this Plan.

The Action Matrix indicates the following four elements:

Action Item

Action items include capital projects, policy or regulatory amendments, and strategies that should be prioritized to lay the foundation for long-term Plan implementation.

Goal Alignment

Each action item is paired with thematic icons that identify the Plan's goals that it supports. See page 30 for descriptions of each goal.

Time Frame

Time frame indicates in approximately how many years the Town should begin to undertake the action item. Descriptions of each time frame are detailed below:

- **Ongoing**, currently being implemented and should continue to be implemented over time
- **Short-term**, less than two years
- **Mid-term**, two to four years
- **Long-term**, over four years

Action Matrix

#	Action Item	Goal Alignment	Time Frame
Land Use Plan (page 32)			
1-1	Align the Unified Development Ordinance (UDO) and Manual of Standard Specifications and Details (MSSD) to the recommendations of the Land Use Plan when next updated.	        	Short-Term
1-2	Update the UDO to target higher density mixed use TOD development (ground-floor commercial and upper-floor residential or office) in a pedestrian-oriented environment within about a half mile radius of future S-Line Stations.	       	Mid-Term
Housing Affordability (page 63)			
2-1	Implement the Affordable Housing Plan once it is complete.	  	Ongoing
Residential Character (page 64)			
3-1	Update multifamily design standards to ensure varied building frontages and rooflines, front porches, front yards, and balconies are incorporated.		Ongoing
3-2	Assess setback requirements for residential districts to ensure the setbacks of infill development match existing development.		Short-Term
3-3	Identify and remove barriers to appropriately scaled infill and redevelopment within older established neighborhoods (see Conventional Residential and Mixed Residential descriptions on Page 37 and Page 38, respectively).	  	Short-Term
3-4	Update the residential supplemental use standards to allow higher density housing along key corridors and surrounding activity centers in a manner that is compatible with surrounding neighborhoods.	  	Short-Term
3-5	Work with developers to locate lower density housing near existing single family detached neighborhoods in larger scale planned subdivisions that provide a mix of housing types.	 	Ongoing
3-6	Investigate updating subdivision development requirement to require a minimum mix of housing types in new residential neighborhoods.	 	Short-Term
3-7	Eliminate flag lots from the UDO to ensure consistent street frontage patterns.	 	Short-Term
3-8	Review and update the UDO to align with residential character recommendations within this Community Plan.	    	Short-Term
3-9	Evaluate current UDO requirements to remove barriers to and better promote accessory dwelling units (ADUs).	  	Short-Term
Senior Housing (page 65)			
4-1	Identify and remove barriers to the development of senior housing within a quarter mile of transit stops, Downtown, shopping areas, parks, and recreational facilities, including a variety of senior housing formats such as smaller lot, single story, ADA accessible homes, co-housing, and cottage home courts.	 	Short-Term
4-2	Update the UDO to remove barriers to supporting continuing care retirement communities (CCRC) or life plan communities.	 	Short-Term

 Support Strategic Growth

 Balance the Mix of Uses

 Maintain the Historic, Small-Town Charm

 Provide Diverse Housing Opportunities

 Support a Pedestrian-/Bicycle-friendly Community

 Establish Safe & Connected Public Transit Options

 Support Unique, Thriving Businesses

 Encourage Growth & Activity in Downtown

 Expand & Maintain Wake Forest's Green Spaces

#	Action Item	Goal Alignment	Time Frame
4-3	Incentivize the inclusion of amenities that are attractive to seniors such as front porches, back patios, walking paths, outdoor sports facilities, and activated gathering spaces.	 	Short-Term
4-4	Investigate and provide incentives to developers to encourage universal design practices.	 	Short-Term
Commercial Development (page 66)			
5-1	Identify strategies to incentivize redevelopment and/or renovation of existing businesses over new greenfield commercial development.	    	Short-Term
5-2	Evaluate and implement expedited review and approval, fee reductions, and other approaches to support small, local businesses over franchises within commercial centers.	  	Ongoing
5-3	Update the commercial building design standards to include requirements for commercial building types to allow for flexibility while promoting quality design.	 	Short-Term
5-4	Establish a minimum building height requirement of two stories within Commercial Corridor and Neighborhood Commercial areas.	 	Short-Term
5-5	Establish multibuilding development standards to encourage pedestrian-oriented shopping environments with sidewalks, attractive storefronts, and buildings facing each other to create desirable sense of enclosure.	  	Short-Term
5-6	Require the incorporation of pedestrian/bicyclist/transit-oriented areas in large-scale shopping centers with outdoor seating and gathering areas, bicycle parking stations, and access to transit services.	   	Short-Term
5-7	Evaluate current requirements for cross-access and pedestrian pathways between adjacent parking lots and leading to buildings in the UDO.		Short-Term
5-8	Update the UDO to promote consolidated commercial driveways along major streets.	 	Short-Term
5-9	Update the UDO's current minimum building design requirements for primary, secondary, and tertiary façades to define when façade types apply and when 360 degree architecture is required.	 	Short-Term
5-10	Evaluate and update the UDO's triggers for sign updates or improvements to encourage businesses to replace existing, non-conforming signage with attractive signage that meets Town standards.	 	Ongoing
5-11	Establish outparcel/liner commercial building design standards to improve the character along primary roadways and break up views of large parking lots.	 	Short-Term
5-12	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.	 	Short-Term
5-13	Allow accessory commercial units and establish supplemental use standards that ensure neighborhood compatibility.	 	Short-Term
5-14	Evaluate policies for supporting businesses at risk of displacement.	  	Short-Term
5-15	Evaluate the UDO for building structure design in primary fire districts related to State building fire code.	 	Short-Term
5-16	Support the development of the new tech park west of the Southeastern Baptist Theological Seminary.	    	Ongoing

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#	Action Item	Goal Alignment	Time Frame
Minority & Women-Owned Businesses (page 67)			
6-1	Work with organizations to expand diversity, equity, and inclusion programs that are supported with grassroots community engagement.		Ongoing
6-2	Explore successful programs in surrounding communities that support minority and women-owned businesses to implement in Wake Forest.		Mid-Term
6-3	Explore and apply for regional, state, and federal grants available for minority and women businesses.		Mid-Term
6-4	Support informational sessions and/or provide educational resources to employers on how they can establish equitable work environments and policies within their businesses.		Mid-Term
Setbacks (page 68)			
7-1	Update landscape and other site development requirements to incentivize businesses to situate new buildings at or near the property line and locate parking to side and rear to improve walkability.	 	Short-Term
7-2	Assess setback requirements to ensure new development and redevelopment forms desirable continuity in the streetwall and the street facing façades of buildings.	 	Short-Term
7-3	Assess regulations to ensure adequate setbacks of industrial or other high intensity uses to reduce potential sound or visual impacts on adjacent lower intensity uses.	 	Short-Term
7-4	Reevaluate the UDO to 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).	 	Short-Term
Parking Lots (page 68)			
8-1	Review and update current UDO retrofit standards that require property owners to iteratively comply with requirements for parking lot perimeter and interior landscaping.	   	Short-Term
8-2	Require off-street parking to be located to the side or rear of the primary building.	  	Short-Term
8-3	Evaluate and revise current shared parking agreement regulations in the UDO to reduce the need for additional parking lots.	 	Ongoing
8-4	Reevaluate minimum parking standards and consider implementing maximum parking standards to reduce excessive requirements.	  	Short-Term
8-5	Monitor parking supply and strategically encourage structured or underground parking in higher density areas if needed (such as Downtown, TOD, and activity center areas) to reduce the amount of land dedicated to surface parking.	  	Ongoing
8-6	Consider offering incentives for structured parking, such as density bonuses, allowable lot coverage increases, and height limit increases.	 	Short-Term
8-7	Encourage the integration of structured parking into multifamily buildings to eliminate the need for surface parking lots.		Ongoing
8-8	Encourage North Carolina Department of Environmental Quality's (NCDEQ) Stormwater Nitrogen and Phosphorus (SNAP) nutrient-reducing practices, such as permeable surfaces.		Ongoing
8-9	Require pedestrian walkways in parking lots to enhance pedestrian connectivity and safety to businesses.		Short-Term

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 Expand & Maintain Wake Forest's Green Spaces

#	Action Item	Goal Alignment	Time Frame
Screening & Buffering (page 69)			
9-1	Enhance screening and buffering requirements for industrial and commercial uses next to residential uses.	  	Short-Term
9-2	Evaluate strategies to encourage tree preservation along site perimeters.	 	Short-Term
9-3	Review and update requirements for screening of utility, loading, outdoor storage, and trash disposal areas that are visible from the right-of-way and adjacent development.	  	Short-Term
9-4	Require dumpster areas to be screened with masonry walls to match the primary building and use either metal or composite wood gates.		Short-Term
9-5	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.	  	Ongoing
Community Character (page 70)			
10-1	Preserve vistas and view corridors that contribute to the economic and aesthetic value of Wake Forest.	 	Ongoing
10-2	Curate public outdoor spaces for important monuments and artworks to showcase them as anchors and entry points to neighborhoods.	 	Ongoing
10-3	Leverage historic structures, events, and people to create a sense of place through placemaking and branding.	  	Ongoing
10-4	Assess district standards and development requirements to ensure new nonresidential and multifamily development is contextual to existing scale, massing, setback, materials, architectural detail and/or features.	 	Short-Term
10-5	Evaluate and develop ordinance to require developers to incorporate landscaping to beautify neighborhoods and commercial areas, such as landscaped medians and roundabouts.	 	Short-Term
10-6	Incorporate landscaping and gateway features into existing public rights-of-way, such as landscaped streetscapes, green infrastructure, and public promenades.	 	Ongoing
10-7	Assess design standards for development along highly visible thoroughfares in the Town to ensure that Wake Forest's positive image is reinforced.	 	Short-Term
10-8	Update the UDO in accordance with the Land Use Plan to ensure incompatible, high intensity uses are located away from low intensity residential areas.	  	Ongoing
10-9	Continue to provide quality municipal services for the maintenance and upkeep of neighborhoods, such as street cleaning, snow removal, and trash disposal services.	  	Ongoing
10-10	Work with NCDOT to identify areas for roadway enhancements (e.g. more frequent grass cutting, upgraded landscaping, trash pick up, etc.).	 	Ongoing
10-11	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.	 	Short-Term
10-12	Refer to the Public Art Vision Plan for guidance when public art is being proposed in private development.	 	Ongoing
10-13	Evaluate updates to the UDO to minimize visual impact of large retaining walls while maintaining structural integrity.		Short-Term

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 Expand & Maintain Wake Forest's Green Spaces

#	Action Item	Goal Alignment	Time Frame
Utility Lines (page 70)			
11-1	Create a master plan for the Renaissance Area for burying utility lines with community involvement to identify priority areas for conversion.	 	Short-Term
11-2	Bury overhead utility lines when feasible as capital improvements are made in the right-of-way for all areas of the Town.		Mid-Term
11-3	Investigate partnering with private developers to install conduit for fiber and/or burying utility lines in priority conversion areas.	   	Mid-Term
11-4	Explore policy for public-private partnerships for boring and installing conduit when private development is occurring along main roadways.	   	Ongoing
11-5	Coordinate burying conduit with greenway projects.	 	Ongoing
11-6	Create a master plan for burying utility lines to identify priority areas for conversion, particularly in TOD and activity centers.	  	Mid-Term
Historic Preservation (page 71)			
12-1	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.		Ongoing
12-2	Continue to enforce the Historic Preservation Ordinance for the Wake Forest Local Historic District and local historic landmarks.		Ongoing
12-3	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.		Ongoing
12-4	Assess zoning district standards to ensure development surrounding and within historic districts and locally designated historic landmarks is sensitive to the historic context of the neighborhood.		Short-Term
12-5	Encourage adaptive reuse, restoration, and repurposing of historic structures to preserve Wake Forest's history.	    	Ongoing
12-6	Continue to enforce the Demolition of Historic Structures Ordinance for the protection of all historic properties in Wake Forest.	  	Ongoing
12-7	Investigate the adoption of new local historic districts or character historic overlay districts to preserve Wake Forest's historic character.		Short-Term
Community Facilities (page 72)			
13-1	Expand all Town municipal facilities and services concurrently with new growth.	   	Ongoing
13-2	Annually review the Town's Work Management Plan, Staffing, and Budget to reflect current needs and priorities.		Ongoing
13-3	Work with the Parks, Recreation, and Cultural Resources Department to identify strategies to close gaps in park service areas.		Mid-Term
13-4	Work with Public Works to identify crosswalk ramps that are not ADA compliant and prioritize upgrades and compliance with Public Rights of Way Accessibility Guidelines (PROWAG).		Ongoing

 Support Strategic Growth

 Balance the Mix of Uses

 Maintain the Historic, Small-Town Charm

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#	Action Item	Goal Alignment	Time Frame
13-5	Promote and incorporate sustainable building practices into community facilities, setting a precedent for private developers to implement.		Mid-Term
13-6	Update the Wake Forest Parks, Recreation, and Cultural Resources Master Plan.	   	Short-Term
13-7	Work with the Parks, Recreation, and Cultural Resources Department to develop a master plan for the Wake Forest Reservoir.	 	Mid-Term
13-8	Work with the Parks, Recreation, and Cultural Resources Department to develop a master plan for the 80-acre Town-owned property west of Heritage High School in accordance with grant agreements.	 	Mid-Term
13-9	Continue to model police and fire service areas concurrently with new growth.		Ongoing
13-10	Continue to work with Engineering and Public Works to prioritize infrastructure improvements in older neighborhoods.	 	Ongoing
13-11	Create a Facilities Space Planning Master Plan.	 	Short-Term
13-12	Explore revising the street calming policy or UDO updates related to traffic calming considerations when reviewing development proposals.	 	Short-Term
13-13	Regularly update the Town Pavement Management System program.	 	Ongoing
Public Transit (page 74)			
14-1	Continue to work with GoRaleigh to consider more frequent service and route network expansions to key locations to improve rider experience and attract more usage of mass transit.		Ongoing
14-2	Evaluate and revise the UDO to require property owners and private developers to set aside land for transit stops at appropriate locations through transit easements.		Short-Term
14-3	Work with GoRaleigh 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.	 	Mid-Term
14-4	Explore incorporating public art into bus shelters.		Mid-Term
14-5	Explore best long term transit options, such as fixed or microtransit.		Short-Term
Capital Boulevard (page 76)			
15-1	Continue to work closely with NCDOT to implement the US 1 Conversion Project and promote commercial growth in accordance with the Land Use Plan.	   	Ongoing
15-2	Continue advocating for improvements along the US 1 corridor to assist in improving the quality of life for Wake Forest residents, businesses, and property owners.	   	Ongoing
Street Connectivity (page 77)			
16-1	Require blocks to be less than 600 linear feet between intersections of local roads in residential areas to improve walkability.		Short-Term
16-2	Establish a minimum connectivity index requirement to minimize dead-ends, cul-de-sacs, and T-intersections.		Short-Term
16-3	Study the appropriateness of traffic circles at four-way intersections to ease congestion and improve safety.		Mid-Term

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#	Action Item	Goal Alignment	Time Frame
Sidewalks & Multi-Use Paths (page 78)			
17-1	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.		Short-Term
17-2	Update the CTP to identify priority areas for high visibility crosswalks, bulb outs, refuge islands, rectangular rapid flashing beacons, and other pedestrian improvements.		Short-Term
17-3	Upgrade aging public sidewalks that are in disrepair or install new sidewalks if none exist in coordination with roadway improvements.		Ongoing
17-4	Require sidewalk, multi-use path, or trail connectivity between residential subdivisions and nonresidential development to improve pedestrian and bicycle connectivity.		Ongoing
17-5	Continue to ensure all new residential development provides sidewalks on both sides of the street.		Ongoing
17-6	Encourage multi-use paths to be provided along the main road in developments.		Ongoing
17-7	Ensure multifamily and commercial developments include strong pedestrian networks within and between their sites.		Ongoing
Bikeways, Greenways & Trails (page 79)			
18-1	Identify trail head locations as the greenway and trail network continues to expand.	 	Ongoing
18-2	Explore opportunities along greenways to add amenities and programming with the Parks, Recreation, and Cultural Resources Department or other organizations (i.e. StoryWalks).	 	Ongoing
18-3	Update the UDO to encourage uses attractive to trail users (i.e. restaurant, cafes, and bars) along greenways to incorporate greenway access into the site design.	  	Short-Term
Local Food Systems (page 80)			
19-1	Continue to support the Northern Community Food Security Team and together explore other locations for community food hubs within the Town.		Ongoing
19-2	Conduct a meal gap survey to better assess the immediate and long term needs in the community.		Mid-Term
19-3	Evaluate the economic impact of local food systems in the community to encourage localized marketplaces for food producers.		Long-Term
19-4	Explore updates to the UDO that would promote urban agriculture and repurposing of vacant or underutilized lots for such uses.		Short-Term
Conservation Design (page 81)			
20-1	Update the UDO's subdivision development regulations to encourage conservation design, particularly for areas within watershed protection areas.		Short-Term
20-2	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.		Short-Term

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#	Action Item	Goal Alignment	Time Frame
Green Space Preservation (page 82)			
21-1	Identify and eliminate barriers to higher density redevelopment and infill development within already developed areas to avoid premature development in long term growth areas and reduce greenfield development.		Short-Term
21-2	Establish conservation development standards to incentivize the preservation of significant natural assets within sites, such as streams, steep slopes, unique geological formations, wetlands, and mature stands of trees.		Short-Term
21-3	Continue to identify and strategically acquire environmentally sensitive land to preserve as dedicated conservation areas and publicly accessible open space.		Ongoing
21-4	Explore strategies to further promote green space preservation within the updated UDO and evaluate what is credited as open space.		Short-Term
21-5	Update the UDO to require private development to provide private open space and amenities in proportion with phases being constructed.		Short-Term
Tree Canopy (page 83)			
22-1	Continue to support the Town in administering the Urban Forestry Program and planting, preserving, and maintaining trees on public properties and rights-of-way.		Ongoing
22-2	Identify and implement updates to the UDO that could further promote tree preservation and replacement in new developments.		Short-Term
22-3	Review existing incentives and consider additional incentives for private developers to promote tree preservation above what is required by the UDO.		Short-Term
22-4	Explore ways to increase the number of trees required in parking lots during the update to the UDO.		Short-Term
22-5	Require 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.		Short-Term
22-6	Seek legislation that will allow the expansion of current tree preservation standards.		Short-Term
22-7	Ensure the UDO update supports Town's established tree canopy goal.		Short-Term
Sustainable Development (page 84)			
23-1	Incentivize green building, LID, and green infrastructure practices in future developments.		Mid-Term
23-2	Incorporate green infrastructure into public streetscapes and Town-maintained properties that beautify spaces, prioritizing pedestrian-oriented areas like Downtown, TOD, and Neighborhood Commercial areas.		Ongoing
23-3	Continue to incorporate sustainable design best practices into Town-owned infrastructure and community facilities, striving for energy efficient future facilities.		Ongoing
23-4	Use the Environmental Protection Agency's (EPA) "Revising Local Codes to Facilitate Low Impact Development" guide to help identify regulations within the UDO and MSSD that discourage LID practices.		Short-Term
23-5	Support the use of attractive, safe, and sustainable street furniture and infrastructure, such as smart or solar streetlights, and LED traffic lights.	 	Ongoing

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#	Action Item	Goal Alignment	Time Frame
23-6	Require the installation of charging stations, or the infrastructure needed to accommodate future charging stations, in all new parking lots.		Short-Term
23-7	Create an online inventory of buildings available for adaptive reuse.	    	Mid-Term
23-8	Explore 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.		Long-Term
23-9	Explore ways to incentivize renewable energy and passive solar design in the Town's development standards.		Short-Term
23-10	Evaluate implementing a composting program.		Mid-Term
23-11	Continue exploring and implementing Smart Cities technology to improve quality of life.		Ongoing
23-12	Conduct a stormwater infrastructure assessment.		Mid-Term
23-13	Perform a watershed study for each watershed in Town.		Mid-Term
23-14	Evaluate potential rainwater collection programs.		Mid-Term
23-15	Explore an incentive program to encourage development to provide stormwater when developments are exempt from stormwater requirements.	 	Short-Term
23-16	Update the MSSD to reference green infrastructure design.		Short-Term
23-17	Explore using decommissioned rights-of-way as potential stormwater routes.	 	Mid-Term
Tourism (page 86)			
24-1	Work with the local arts community and organizations to identify strategies to grow the Town's reputation as a regional arts destination with a Downtown focus.	 	Ongoing
24-2	Explore the potential of constructing a recreational destination facility with a regional draw.		Long-Term
24-3	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.		Ongoing
24-4	Support the Wake Forest Area Chamber with creating and marketing a local visitor's center as a public resource hub for the Town's attractions, events, and businesses for visitors.		Mid-Term
24-5	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.		Ongoing
24-6	Create a community-wide wayfinding plan to improve sense of place and signage that directs visitors and residents to Town destinations.	 	Short-Term
24-7	Continue to support Wake Forest Downtown Inc. in meeting the National Accreditation Standards of Performance as outlined by the National Main Street Center.	 	Ongoing

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#	Action Item	Goal Alignment	Time Frame
24-8	Explore the potential of creating an arts district and constructing a performing arts center.	  	Mid-Term
24-9	Investigate developing a heritage tourism program to promote the Town's history and heritage for tourism.	  	Long-Term
24-10	Investigate hiring consultants to provide a comprehensive evaluation of Town events and provide recommendations for improved programs.	  	Mid-Term
24-11	Update the Public Art Vision Plan.	  	Mid-Term

Gateways (page 88)

25-1	Create a Gateway Plan to identify and prioritize sites for gateway features and establish design standards.	 	Mid-Term
25-2	Improve roadway infrastructure (i.e. bridge, street pavement, and intersection enhancements) along key gateway routes to enhance their character and multimodal connectivity.	  	Mid-Term

Downtown Wake Forest (page 89)

26-1	Update the Renaissance Plan.	       	Mid-Term
26-2	Evaluate existing zoning regulations around density in appropriate locations to balance Downtown's development potential while preserving its historic character.	       	Mid-Term
26-3	Identify strategies to fill vacant buildings Downtown that promote an entrepreneurial and small-business culture.	  	Mid-Term
26-4	Identify strategies to attract families and younger populations to Downtown with inviting public spaces, entertainment, and destinations for all ages.		Ongoing
26-5	Provide guidelines for how buildings should be oriented to support pedestrian-friendly environments.		Mid-Term
26-6	Reassess parking demand and supply with consideration for a new parking garage(s) to minimize surface parking lots.		Mid-Term
26-7	Identify strategies to create an "experience-based" Downtown retail environment with unique local businesses and a pedestrian-oriented environment.	 	Mid-Term
26-8	Reassess strategies to improve gateways and wayfinding to and within Downtown to better direct people and create a distinct sense of place.		Mid-Term
26-9	Identify opportunities for Downtown events and public gathering spaces to bring the community together, such as live outdoor events and festivals.		Ongoing
26-10	Evaluate and add parking minimum requirements within the UDO, particularly in the RA-HC district.		Short-Term
26-11	Balance transit-oriented development with Downtown's historic character if the S-Line station is constructed adjacent to Downtown.		Long-Term

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Proposed Draft Community Plan and Future Land Use Map Revisions

Page # 3/2/22 Draft	Type of Revision	Revision Summary
ii	Text	Revise spelling of Shiela Bishop to Sheila Bishop.
37	Graphic	Image to be updated prior to final draft.
38	Graphic	Image to be updated prior to final draft.
39	Graphic	Image to be updated prior to final draft.
39	Text	Add mixed use as a supporting use in Transit-Supportive Residential.
47	Map	Reclassify private property (PINs 1841213763 and 1841225196) incorrectly designated as open space to office, civic and institutional.
48	Text	Update spelling of "enivornments" in the Transit-Oriented Development paragraph.
50	Text	Revise spelling of "County" to "Country".
52	Text	Revise sentence in Residential Area 9 description from "Appropriate housing types include multifamily, two-over-twos, duplexes, and townhomes that are affordable to households earning 60 to 120% of the area's medium income (AMI)." to "Appropriate housing types include multifamily, two-over-twos, duplexes, and townhomes that are affordable to households earning 60 to 120 percent of the area's median income (AMI) are encouraged."
52	Text	Revise "medium" to "median".
72	Text	Revise key recommendation from "Explore revising the street calming policy or UDO updates related to traffic calming consideration when reviewing development proposals" to "Evaluate existing streets and explore UDO updates to address traffic congestion, traffic speed, reduce collisions, and improve safety conditions for all modes of transportation."
74	Graphic	Image to be updated prior to final draft.
78	Graphic	Image to be updated prior to final draft.
79	Graphic	Update map legend.
80	Graphic	Image to be updated prior to final draft.
85	Text	Revise "Manual of Standard Specifications and Details" to "Manual of Specifications, Standards and Design"
85	Text	Revise "Develop a solar engergy ordinance and enroll 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." to " 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."

Proposed Draft Community Plan and Future Land Use Map Revisions

Page # 3/2/22 Draft	Type of Revision	Revision Summary
93	Text	Revise "four" to "three" in the sentence above the Action Item heading.
98	Text	Revise timeframe for 11-2 to Ongoing.
99	Text	Add action item 13-14 related to coordination with NCDOT. Action Item 13-14: Continue to identify congestion management and infrastructure improvement opportunities on state maintained roadways in coordination with NCDOT.
99	Text	Revise timeframe for 16-3 to Ongoing.
103	Text	Revise timeframe for 26-1, 26-2, and 26-11 to Short-Term.



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-523-
Submitted by: Emma Linn
Submitting Department: Planning
Meeting Date: April 19, 2022

SUBJECT

Public hearing on an annexation petition submitted by George C. Mackie Jr. and Martha Mackie for property associated with Hamlet at Quail Crossing located at 1423 Deerfield Crossing Drive, being Wake County Tax PIN 1850-26-8976 (portion) and adjacent rights-of-way.

Recommendation:

Item Summary:

ATTACHMENTS

- [041922 BOC Agenda Summary AN-22-02.pdf](#)
- [Attachment A Legal Description AN-22-02.pdf](#)
- [Attachment B Annexation Map AN-22-02.pdf](#)
- [Attachment C Annexation Petition and Power of Attorney AN-22-02.pdf](#)
- [1423 Deerfield Xing Draft Ordinance \(AN-22-02\).docx](#)

Agenda Item: Public hearing for a petition requesting annexation submitted by George C. Mackie Jr. and Martha Mackie for property associated with Hamlet at Quail Crossing located at 1423 Deerfield Crossing Drive, being Wake County Tax PIN 1850-26-8976 (portion) and adjacent rights-of-way.

Summary: The Board of Commissioners set the date of the public hearing, accepted the annexation petition, adopted the resolution to investigate the annexation petition and had the Town Clerk certify the annexation petition at the March 15, 2022 meeting. This annexation petition is associated with the construction drawings, SP-21-06, that have been submitted for Hamlet at Quail Crossing

Attachments: Attachment A Legal Description AN-22-02
Attachment B Annexation Map AN-22-02
Attachment C Annexation Petition and Power of Attorney AN-22-02
Draft Ordinance

QUAIL CROSSING ANNEXATION

LEGAL DESCRIPTION

BEGINNING AT A POINT IN THE NORTHERN RIGHT OF WAY OF N.C. HIGHWAY 98 (60-FOOT PUBLIC RIGHT OF WAY); THENCE WITH SAID RIGHT OF WAY SOUTH 84°18'11" EAST 427.54 FEET TO A POINT; THENCE LEAVING SAID RIGHT OF WAY SOUTH 00°01'41" WEST 993.35 FEET TO A IRON PIPE SET; THENCE SOUTH 38°24'23" WEST 1216.50 FEET TO A IRON PIPE SET; THENCE SOUTH 60°42'26" WEST 322.84 FEET TO A IRON PIPE SET; THENCE NORTH 37°50'44" WEST 64.80 FEET TO A IRON PIPE SET; THENCE SOUTH 52°09'16" WEST 208.02 FEET TO A POINT IN THE CENTER LINE OF JONES DAIRY ROAD (VARIABLE WIDTH PUBLIC RIGHT OF WAY); THENCE WITH SAID CENTERLINE NORTH 38°19'11" WEST 0.53 FEET TO A POINT; THENCE NORTH 37°56'06" WEST 65.18 FEET TO A POINT; THENCE NORTH 38°44'09" WEST 34.34 FEET TO A POINT; THENCE NORTH 37°43'11" WEST 58.25 FEET TO A POINT; THENCE NORTH 37°08'14" WEST 53.77 FEET TO A POINT; THENCE NORTH 38°38'30" WEST 25.94 FEET TO A POINT; THENCE LEAVING SAID CENTERLINE NORTH 30°21'42" EAST 405.36 FEET TO AN IRON PIPE; THENCE NORTH 01°08'43" WEST 100.01 FEET TO AN IRON PIPE; THENCE NORTH 07°15'29" WEST 242.27 FEET TO AN IRON PIPE; THENCE NORTH 30°25'33" EAST 1560.48 FEET TO THE POINT AND PLACE OF BEGINNIGN CONTAINING 36.780 ACRES, 1,602,141 SQUARE FEET.



McADAMS

The John R. McAdams Company, Inc.
2905 Meridian Parkway
Durham, NC 27713

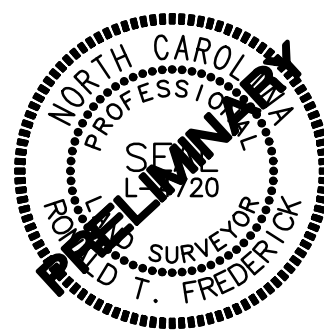
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fax 919. 361. 2269
license number: C-0293, C-187

www.mcadamsco.com

CLIENT

MIDDLEBURG COMMUNITIES

QUAIL CROSSING
ANNEXATION MAP
1423 DEERFIELD CROSSING DRIVE
WAKE COUNTY, NC



REVISIONS

NO. DATE

PLAN INFORMATION

PROJECT NO. 2020110486
FILENAME 2020110486-A1
CHECKED BY RTF
DRAWN BY TAM
SCALE 1"=200'
DATE 01-19-22

SHEET

SHEET TITLE

1-1

GENERAL NOTES

1. THIS IS A SURVEY OF AN EXISTING PARCEL(S) OF LAND. THIS IS A RECOMBINATION SURVEY. BEARINGS FOR THIS SURVEY ARE BASED ON NC GRID NAD 83(2011).
2. ALL DISTANCES ARE HORIZONTAL GROUND DISTANCES.
3. ZONING: RD PER WAKE COUNTY GIS; NO ZONING REPORT PROVIDED.
4. AREA BY COORDINATE GEOMETRY.
5. FLOOD NOTE: THIS PROPERTY IS PARTIALLY LOCATED IN A SPECIAL FLOOD HAZARD ZONE. IT IS LOCATED IN ZONES "AE" & "X" AS DEFINED BY F.E.M.A F.I.R.M COMMUNITY PANEL #3720185000J DATED MAY 2, 2006.
- 6.

VICINITY MAP
NOT TO SCALE

I, THERESA SAVARY, DEPUTY TOWN CLERK, TOWN OF WAKE FOREST, NORTH CAROLINA CERTIFY THAT THIS IS A TRUE AND ACCURATE MAP OF ANNEXATION ADOPTED THE _____ DAY OF _____, 20____ BY THE WAKE FOREST BOARD OF COMMISSIONERS. I SET MY HAND AND SEAL OF THE TOWN OF WAKE FOREST,

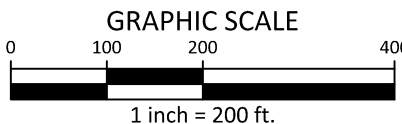
2022

THERESA SAVARY

LEGEND(UNLESS OTHERWISE NOTED)

- ▲ CALCULATED POINT
- CONCRETE MONUMENT
- IRON PIPE
- IRON PIPE SET
- ADJOINER
- ANNEXATION LINE
- BOUNDARY
- BUFFER
- 1% ANNUAL CHANCE FLOOD LINE
- FLOODWAY
- POND
- RIGHT OF WAY

LINE TABLE		
LINE	BEARING	DISTANCE
L1	S 60°42'26" W	322.84'
L2	N 37°50'44" W	64.80'
L3	S 52°09'16" W	178.02'
L4	S 52°09'16" W	30.00'
L5	N 38°19'11" W	0.53'
L6	N 37°56'06" W	65.18'
L7	N 38°44'09" W	34.34'
L8	N 37°43'11" W	58.25'
L9	N 37°08'14" W	53.77'
L10	N 38°38'30" W	25.94'
L11	N 01°08'43" W	100.01'
L12	N 07°15'29" W	242.27'



SURVEYOR'S CERTIFICATE

I, RONALD T. FREDERICK, CERTIFY THAT THIS PLAT WAS DRAWN UNDER MY SUPERVISION FROM AN ACTUAL SURVEY MADE UNDER MY SUPERVISION (DEED DESCRIPTION RECORDED IN BOOK _____, PAGE _____); THAT THE BOUNDARIES NOT SURVEYED ARE CLEARLY INDICATED AS DRAWN FROM INFORMATION FOUND IN BOOK _____, PAGE _____; THAT THE RATIO OF PRECISION OR POSITIONAL ACCURACY AS CALCULATED IS _____±; THAT THIS PLAT WAS PREPARED IN ACCORDANCE WITH G.S. 47-30 AS AMENDED. WITNESS MY ORIGINAL SIGNATURE, LICENSE NUMBER AND SEAL THIS _____ DAY OF _____, A.D., _____.

TYPE OF PLAT

I HEREBY CERTIFY THIS PLAT OF THE FOLLOWING TYPE: G.S. 47-30 (F)(11)(D). THAT THE SURVEY IS OF ANOTHER CATEGORY, SUCH AS THE RECOMBINATION OF EXISTING PARCELS, A COURT-ORDERED SURVEY, OR OTHER EXEMPTION OR EXCEPTION TO THE DEFINITION OF SUBDIVISION.

RONALD T. FREDERICK, PROFESSIONAL LAND SURVEYOR L-4720



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: 1/21/2022

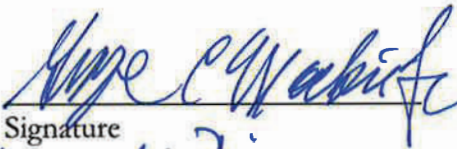
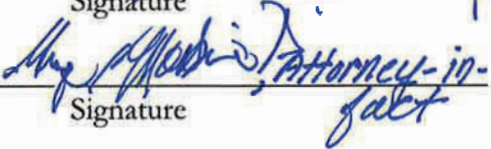
To the Board of Commissioners of the Town of Wake Forest:

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*):

Please see pages immediately following for legal description and annexation plat.

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.

MACKIE, GEORGE C JR	528 N. MAIN ST WAKE FOREST, NC 27587		2/15/2022
Name	Address	Signature	Date
MACKIE, MARTHA H	528 N Main St Wake Forest NC 27587		2/15/2022
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.

Prepared by: Maria M. Lynch
Mail after recording to:
Lynch & Eatman, P.A.
PO Box 30515
Raleigh, NC 27622-0515

STATE OF NORTH CAROLINA DURABLE GENERAL POWER OF ATTORNEY

COUNTY OF WAKE

**ARTICLE I
DESIGNATION OF AGENT**

A. **Designation of Agent.** I, MARTHA H. MACKIE, of Wake County, North Carolina, designate GEORGE C. MACKIE, JR., as my Agent for the purposes set out below.

B. **Designation of Successor Agent.** If GEORGE C. MACKIE, JR., is not reasonably available or is unable or unwilling to serve for any reason as my Agent, then I designate the following persons to serve in that capacity, each to act alone and successively in the order named:

AMY LEE MACKIE

**ARTICLE II
GRANT OF GENERAL AUTHORITY**

I grant to my Agent general authority to act for me with respect to the subjects described in North Carolina General Statutes Sections 32C-2-204 through 32C-2-216, the descriptive terms of which are as follows:

1. Real Property
2. Tangible Personal Property
3. Stocks and Bonds
4. Commodities and Option
5. Banks and Other Financial Institutions
6. Operation of Entity or Business

Submitted electronically by "Lynch & Eatman, LLP"
in compliance with North Carolina statutes governing recordable documents
and the terms of the submitter agreement with the Wake County Register of Deeds.

7. Insurance and Annuities
8. Estates, Trusts and Other Beneficial Interests
9. Claims and Litigation
10. Personal and Family Maintenance
11. Benefits from Governmental Programs or Civil or Military Service
12. Retirement Plans
13. Taxes

ARTICLE III GRANT OF SPECIFIC AUTHORITY

I expressly grant my Agent the authority to do the following specific acts:

A. Gifts.

1. The power to make gifts to or for the benefit of any one or more of the following (including my Agent):

- a. My issue.
- b. The spouses of my issue.
- c. Any charitable, religious or educational organization described in Sections 170(c) and 2522(a) of the Internal Revenue Code in accordance with my history of making and joining in the making of gifts.

2. Gifts to my issue and the spouses of my issue may only be made (i) that qualify and do not exceed the annual exclusion for federal gift tax purposes under Section 2503 of the Internal Revenue Code or, if my spouse agrees to consent to the split gift pursuant to Section 2513 of the Internal Revenue Code in an amount per donee not to exceed twice the annual federal gift tax exclusion limit, and (ii) that qualify for the exclusion for tuition or medical care for federal gift tax purposes under Section 2503(e) of the Internal Revenue Code.

3. Such benefits to or for the benefit of the donee may be made in any manner that will qualify for the exclusion including, but not limited to, outright gifts, gifts in trust, including trusts created by my Agent, the trustee of which may be my Agent, gifts to a custodian under the Uniform Gifts or Transfers to Minors Act (including a custodian designated by my Agent, which may be my Agent) and gifts to a tuition savings account or prepaid tuition plan as defined under Section 529 of the Internal Revenue Code, and gifts to an ABLE account as defined under Section 529A of the Internal Revenue Code.

4. Notwithstanding the foregoing provisions of this Paragraph A, the aggregate amount of any gift in any calendar year to or for the benefit of my Agent or to satisfy my Agent's legal obligations shall not exceed the greater of (i) five percent (5%) of the value of the assets over which my Agent has the power to act or (ii) five thousand dollars (\$5,000.00).

B. Create or Change Rights of Survivorship. The power to create, change or terminate any ownership arrangement, including bank and brokerage accounts, in which I am a joint tenant owning an interest with one or more other persons with rights of survivorship.

C. Create or Change a Beneficiary Designation. The power to create a new beneficiary designation or change an existing beneficiary designation of any retirement plan or insurance or annuity contract or other account at any financial institution in which I have an interest, *except that my Agent cannot increase my Agent's interest as a designated beneficiary unless my Agent is my spouse, or an issue, parent or sibling of mine.*

D. Delegate Authority Granted Under the Power of Attorney. The power to delegate to another person any of the authority granted to my Agent or engage another person on my behalf. If an appointment of another Agent is necessary, my Agent may appoint such person and revoke the appointment.

E. Waive My Right to be a Beneficiary of a Joint and Survivor Annuity. The power to waive my right to be a beneficiary of any joint and survivor annuity, including a survivor benefit under a retirement plan. This waiver of rights shall apply to an annuity or retirement plan which is owned by me or in which I am a participant or a beneficiary.

F. Exercise Fiduciary Powers that I Have Authority to Delegate. The power to exercise any fiduciary powers that I have authority to delegate.

G. Renounce or Disclaim Property and Power of Appointment. The power to renounce in accordance with Chapter 31B of the General Statutes any property or interest in property to which I may have succeeded as a person listed in subdivision (1) through (9e) of General Statutes Section 31B-1(a).

H. Exercise Authority Over the Content of Electronic Communications. The power to exercise authority and take control over and request an authorized disclosure of the contents of any of my electronic communications sent or received by me, any catalogue of electronic communications sent or received by me and any other digital asset of mine.

I. Dealings with Revocable Trusts. The power to exercise my powers as grantor of a revocable trust with respect to (i) the revocation and amendment of the revocable trust, (ii) the addition to the revocable trust of all or any part of my real or personal property or my interest in such property, and the disposition of the property of the revocable trust and the power to create a revocable trust with me as grantor, except that the exercise of the powers granted in this paragraph shall not alter the designation of beneficiaries to receive property on my death under my existing estate plan.

J. **Consent to Modification or Termination of Irrevocable Trusts.** The power to exercise my power as grantor of a noncharitable irrevocable trust to consent to the modification or termination of the trust but only if the modification or termination cannot accelerate or increase my Agent's interest in the trust if my Agent is a beneficiary of the trust.

K. **Exercise of Powers Over Offices Held by Me.** The power to renounce, accept or resign from, on my behalf, any offices which I may hold or have the right to hold, including fiduciary positions, and appoint on my behalf any fiduciary which I may have the right to appoint, or renounce any such right on my behalf.

ARTICLE IV LIMITATIONS ON EXERCISE OF POWERS BY AGENT

The following limitations shall apply to the exercise of the powers by my Agent in addition to any other limitations provided in this power of attorney:

A. Notwithstanding a grant of authority to do an act described in Article III of this power of attorney, my Agent may exercise such authority only as my Agent determines is consistent with my objectives if actually known by my Agent and, if unknown, as my Agent determines is consistent with my best interest based on all relevant factors which may include those set out in General Statutes Section 32C-2-201(b)(1) through (6).

B. Unless otherwise specifically provided in this power of attorney, my Agent may not exercise authority under this power of attorney to create in my Agent, or in an individual to whom my Agent owes a legal obligation of support, an interest in my property whether by gift, right of survivorship, beneficiary designation, disclaimer or otherwise.

C. My Agent may not deal with insurance policies which I may own on the life of my Agent.

ARTICLE V MISCELLANEOUS MATTERS RELATED TO MY AGENT

A. **Guardianship.** I nominate my Agent acting under this document to be my general guardian or the guardian of my estate if protective proceedings for my estate have begun after I execute this power of attorney.

B. **Accountings.** My Agent shall keep a record of all receipts, disbursements, and transactions made on my behalf, but my Agent is not required to disclose such records to me or anyone else unless ordered by a court or requested by me or my guardian, or upon my death by my personal representative or the successor in interest of my estate.

C. **Revocation of Agent's Authority.** In addition to other events or occurrences revoking my Agent's authority under this power of attorney, I may revoke that authority and remove my Agent by a writing executed by me and delivered to my Agent in person or to my Agent's last known address by certified or registered mail return receipt requested.

D. **Resignation of Agent.** My Agent shall have the right to resign by giving written notice of resignation to me if I am not incapacitated or if I am incapacitated to my guardian if one has been appointed and any coagent or, if none, the successor agent next designated.

E. **Duty and Liability of Agent.** If my Agent accepts the authority under this power of attorney, then in exercising a power granted to my Agent, my Agent shall act in accordance with my reasonable expectations if known and, otherwise, in my best interests, in good faith, and only within the scope of the authority granted in this power of attorney.

F. **Coordination with Health Care Agent.** My Agent shall cooperate with my Health Care Agent appointed pursuant to a Health Care Power of Attorney meeting the requirements of Article III, Chapter 32A of the General Statutes. Any decision affecting my property or financial affairs, including a decision as to the disbursement of money or other property belonging to me, which is made by my Health Care Agent, shall be superior to and binding upon my Agent acting under this power of attorney, and my Agent shall not be required to inquire as to whether any such decision is necessary to exercise the powers relating to health care, or whether costs incurred by my Health Care Agent are reasonable, and shall not be liable to me or to my successors, assigns, heirs or personal representatives for any acts or omissions arising from any such decision.

G. **Compensation of My Agent.** My Agent shall serve without compensation.

ARTICLE VI RELiance ON THIS POWER OF ATTORNEY

A person who in good faith accepts this power of attorney without actual knowledge that the power of attorney or my Agent's purported authority is void, invalid, or terminated, or that my Agent exceeded my Agent's authority, may rely on the power of attorney and my Agent's authority as if they were genuine, valid, and still in effect and shall not be held responsible for any breach of fiduciary duty by my Agent.

ARTICLE VII REVOCATION AND TERMINATION

A. **Revocation of Prior Powers of Attorney.** The execution of this power of attorney shall revoke any previously executed general power of attorney that has not been registered in an office of the register of deeds in any county of North Carolina. I

shall notify the agent acting under any such previously executed power of attorney of its revocation in a writing delivered in person or to the agent's last known address by registered or certified mail return receipt requested. I do not intend by the execution of this power of attorney to revoke any previously executed Health Care Power of Attorney or other power of attorney for limited or specific purpose.

B. Termination of this Power of Attorney. This power of attorney shall terminate upon (i) my death, (ii) my revocation of this power of attorney, (iii) my revocation of my Agent's authority, or upon my Agent's death, incapacity or resignation, if this power of attorney does not provide for another agent to act, or (iv) upon termination by my general guardian or the guardian of my estate.

ARTICLE VIII MEANING AND EFFECT

The meaning and effect of this power of attorney shall for all purposes be determined by the law of the State of North Carolina.

ARTICLE IX EFFECTIVE DATE AND DURABILITY

This power of attorney is effective on the date it is signed by me and shall not be affected by my subsequent incapacity.

I have signed this power of attorney this 30th day of January, 2019.

Martha H. Mackie (SEAL)
MARTHA H. MACKIE

STATE OF NORTH CAROLINA

COUNTY OF WAKE

I certify that the following person personally appeared before me this day, acknowledging to me that she signed the foregoing instrument: MARTHA H. MACKIE.

Date January 30, 2019



Priscilla B. Feliu
Priscilla B. Feliu, Notary Public

My Commission Expires: May 23, 2020

ORDINANCE 2022-

AN ORDINANCE TO EXTEND THE CORPORATE LIMITS OF THE TOWN OF WAKE FOREST, NORTH CAROLINA

(Annexation submitted by George C. Mackie Jr. and Martha Mackie for property associated with Hamlet at Quail Crossing located at 1423 Deerfield Crossing Drive, being Wake County Tax PIN 1850-26-8976 (portion) and adjacent rights-of-way.)

WHEREAS, the Board of Commissioners has adopted a resolution under N.C.G.S. 160A-31, as amended, stating its intent to annex the area described below; and

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

WHEREAS, the Deputy Town Clerk has certified the sufficiency of said petition and a public hearing on the question of this annexation was held at the Town of Wake Forest Town Hall at 6:00 p.m. on April 19, 2022, after due notice by publication on April 8, 2022; and

WHEREAS, the Board of Commissioners does hereby find as a fact that said petition meets the requirements of N.C.G.S. 160A-31, as amended;

NOW, THEREFORE, BE IT ORDAINED by the Board of Commissioners of the Town of Wake Forest, North Carolina:

Section 1. By virtue of the authority granted by N.C.G.S. 160A-31, as amended, the following described territory is hereby annexed and made part of the Town of Wake Forest as of the 19th day of April, 2022.

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

Section 2. Upon and after the 19th day of April, 2022, the territory and its citizens and property shall be subject to all debts, laws, ordinances, and regulations in force in the Town of Wake Forest and shall be entitled to the same privileges and benefits as other parts of the

Town of Wake Forest. Said territory shall be subject to municipal taxes according to N.C.G.S. 160A-58.10.

Section 3. The Mayor and the Town of Wake Forest shall cause to be recorded in the office of the Register of Deeds of Wake County, and in the office of the Secretary of State at Raleigh, North Carolina, an accurate map of the annexed territory, described in Section 1 hereof, together with a duly certified copy of this ordinance.

This the 19th day of April, 2022.

Mayor: _____

APPROVED AS TO FORM:

Town Attorney

ATTEST:

Deputy Town Clerk



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-515-
Submitted by: Emma Linn
Submitting Department: Planning
Meeting Date: April 19, 2022

SUBJECT

Public Hearing on a petition requesting contiguous annexation submitted by Ammons Property Two LLC for property associated with Traditions Townhomes located at 0 Traditions Grande Boulevard being Wake County PIN 1851-12-8142 and adjacent rights-of-way being approximately 7.5617 acres.

Recommendation:

Item Summary:

ATTACHMENTS

- [041922 BOC Agenda Summary AN-22-01.pdf](#)
- [Attachment A Legal Description AN-22-01.pdf](#)
- [Attachment B Annexation Map AN-22-01.pdf](#)
- [Attachment C Annexation Petition AN-22-01.pdf](#)
- [0 Traditions Grande Blvd Draft Ordinance \(AN-22-01\).docx](#)

Agenda Item: Public hearing of a petition requesting contiguous annexation submitted by Ammons Property Two LLC for property associated with Traditions Townhomes located at 0 Traditions Grande Boulevard being Wake County PIN 1851-12-8142 and adjacent rights-of-way being approximately 7.5617 acres.

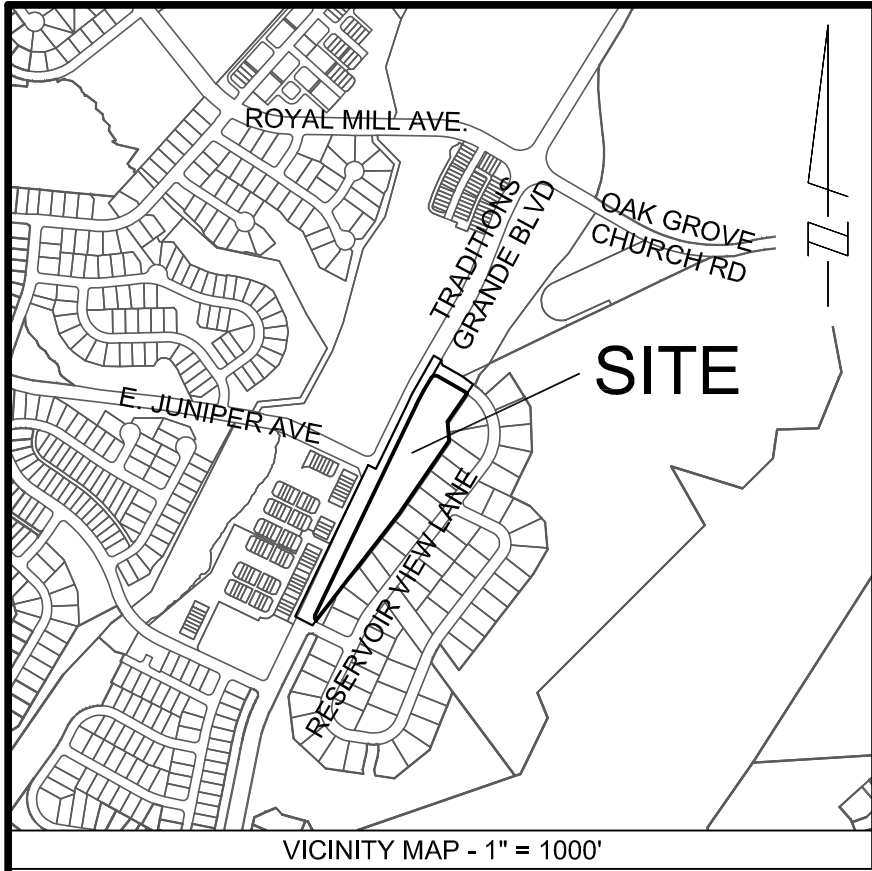
Summary: The property proposed for annexation is contiguous to the corporate limits of the Town of Wake Forest for Ammons Property Two LLC. The Board of Commissioners set the date of the public hearing, accepted the annexation petition, adopted the resolution to investigate the annexation petition and had the Town Clerk certify the annexation petition at the March 15, 2022 meeting. This annexation petition is associated with the construction drawings, SD-20-05, that have been submitted for Traditions Townhomes.

Attachments: Attachment A Legal Description AN-22-01
Attachment B Annexation Map AN-22-01
Attachment C Contiguous Annexation Petition AN-22-01
Draft Ordinance

AREA TO BE ANNEXED:

BEGINNING AT A POINT LOCATED ON THE NORTHERN EDGE OF THE NEW WATER WAY RIGHT-OF-WAY, THE EASTERN EDGE OF THE TRADITIONS GRANDE BOULEVARD, AND SAID POINT BEING THE SOUTHWESTERN PROPERTY CORNER OF LANDS NOW OR FORMERLY OF TRADITIONS MASTER ASSOCIATION INC AS RECORDED IN DEED BOOK 18264 PAGE 972, WAKE COUNTY REGISTRY; THENCE CROSSING SAID TRADITIONS GRANDE BOULEVARD RIGHT-OF-WAY SOUTH 37°41'58" WEST A DISTANCE OF 30.46 FEET TO A POINT; THENCE NORTH 62°18'15" WEST A DISTANCE OF 101.47 FEET TO A POINT,, SAID POINT BEING LOCATED ON THE WESTERN EDGE OF THE TRADITIONS GRANDE BOULEVARD ; THENCE ALONG AND WITH SAID RIGHT-OF-WAY NORTH 25°43'39" EAST A DISTANCE OF 874.33 FEET TO A POINT; THENCE PERPENDICULAR FROM SAID RIGHT-OF-WAY EDGE SOUTH 64°16'21" EAST 45.00 FEET TO A POINT, SAID POINT BEING LOCATED ON THE CENTERLINE OF THE TRADITIONS GRANDE BOULEVARD; THENCE ALONG AND WITH SAID CENTERLINE NORTH 25°43'39" EAST A DISTANCE OF 73.92 FEET TO A POINT; THENCE NORTH 25°43'40" EAST A DISTANCE OF 314.23 FEET TO A POINT; THENCE NORTH 25°44'28 "EAST A DISTANCE OF 24.77 FEET TO A POINT; THENCE WITH CURVE TO THE RIGHT AN ARC DISTANCE OF 22.37 FEET TO A POINT,SAID CURVE HAVING A RADIUS OF 850.00 FEET, A CHORD DIRECTION OF NORTH 26°28'55" EAST, AND A CHORD DISTANCE OF 22.37 FEET; THENCE WITH A CURVE TO THE RIGHT AN ARC DISTANCE OF 40.74 FEET TO A POINT, SAID CURVE HAVING A RADIUS OF 850.00 FEET , A CHORD DIRECTION OF NORTH 28°36'32" EAST A DISTANCE OF 40.73 FEET TO A POINT; THENCE NORTH 29°58'36" EAST A DISTANCE OF 186.08 FEET TO A POINT; THENCE LEAVING SAID CENTERLINE SOUTH 60°01'24" EAST A DISTANCE OF 45.00 FEET TO A POINT, SAID POINT BEING LOCATED ON THE EASTERN EDGE OF THE TRADITIONS GRANDE BOULEVARD AND THE NORTHERN EDGE OF THE RESERVOIR VIEW LANE RIGHT-OF-WAY AND BEING THE POINT OF BEGINNING; THENCE ALONG AND WITH SAID NORTHERN RIGHT-OF-WAY EDGE WITH A CURVE TO THE LEFT AN ARC DISTANCE OF 29.70 FEET TO A POINT, SAID CURVE HAVING A RADIUS OF 25.00 FEET, A CHORD DIRECTION OF SOUTH 15°38'27" EAST, AND A CHORD DISTANCE OF 27.99 FEET TO A POINT; THENCE SOUTH 59°49'01" EAST A DISTANCE OF 118.16 FEET TO A POINT; THENCE SOUTH 53°58'36" EAST A DISTANCE OF 68.74 FEET TO A POINT; THENCE CROSSING SAID RIGHT-OF-WAY SOUTH 34°31'22" WEST A DISTANCE OF 56.40 FEET TO A POINT, SAID POINT BEING THE NORTHWESTERN PROPERTY CORNER OF LANDS NOW OR FORMERLY OF JONES, CHRISTOPHER LYNN AND JONES, MARY E AS RECORDED IN DEED BOOK 18343 PAGE 611, AND SHOWN ON BOOK OF MAPS 2019 PAGE 74, WAKE COUNTY REGISTRY; THENCE ALONG AND WITH SAID WESTERN PROPERTY LINE SOUTH 34°31'22" WEST A DISTANCE OF 179.85 FEET TO AN EXISTING IRON PIPE, SAID IRON PIPE HAVING NC GRID (NAD '83/2011) COORDINATES OF N: 812403.5450 FEET E 2152080.6120 FEET; THENCE SOUTH 05°16'36" EAST A DISTANCE OF 99.15 FEET TO AN EXISTING IRON PIPE, SAID IRON PIPE BEING LOCATED ON THE WESTERN PROPERTY LINE OF LANDS NOW OR FORMERLY OF HUMPHREY, BRIAN J. AS RECORDED IN DEED BOOK 17762 PAGE 2615 AND SHOWN ON BOOK OF MAPS 2018 PAGE 74, WAKE COUNTY REGISTRY AND BEING A PART OF THE TRADITIONS SOUTHEAST SUBDIVISION; THENCE ALONG AND WITH SAID SUBDIVISION SOUTH 34°31'58" WEST A DISTANCE OF 456.71 FEET TO A POINT, SAID POINT BEING LOCATED ON THE WESTERN PROPERTY LINE OF LANDS NOW OR FORMERLY OF ROSA, JOSE AND ROSA, AMY AS RECORDED IN DEED BOOK 17123 PAGE 923

AND SHOWN ON BOOK OF MAPS 2017 PAGE 1361, WAKE COUNTY REGISTRY AND BEING A PART OF THE TRADITIONS SOUTHEAST SUBDIVISION; THENCE ALONG AND WITH SAID SUBDIVISION SOUTH 37°42'24" WEST A DISTANCE OF 349.80 FEET TO AN EXISTING IRON PIPE, SAID IRON PIPE BEING THE NORTHWESTERN PROPERTY CORNER OF LANDS NOW OR FORMERLY OF HERCO, AMELA AND HERCO, DAJAN AS RECORDED IN DEED BOOK AS RECORDED ON DEED BOOK 18567 PAGE 1493, AND SHOWN ON BOOK OF MAPS 2014 PAGE 567, WAKE COUNTY REGISTRY; THENCE ALONG AND WITH SAID WESTERN PROPERTY LINE SOUTH 37°42'39" WEST A DISTANCE OF 128.13 FEET TO AN EXISTING IRON PIPE, SAID IRON PIPE BEING THE NORTHWESTERN PROPERTY CORNER OF LANDS NOW OR FORMERLY OF KLAUS, ROBERT LAWRENCE AS RECORDED IN DEDD BOOK 17304 PAGE 1686, AND SHOWN ON BOOK OF MAPS 2014 PAGE 564, WAKE COUNTY REGISTRY; THENCE ALONG AND WITH SAID WESTERN PROPERTY LINE SOUTH 37°43'20" WEST A DISTANCE OF 76.02 FEET TO AN EXISTING IRON PIPE, SAID IRON PIPE HAVING NC GRID (NAD '83/2011) COORDINATES OF N: 811490.3400 FEET E: 2151492.0030 FEET; THENCE SOUTH 37°41'58" WEST A DISTANCE OF 155.46 FEET TO THE POINT OF BEGINNING, CONTAINING 7.5617 ACRES, AND BEING THE AREA TO BE ANNEXED.



- NOTE:
1. AREAS BY COORDINATE GEOMETRY UNLESS SHOWN OTHERWISE.
 2. ALL DISTANCES ARE HORIZONTAL GROUND DISTANCES.
 3. ALL STREETS ARE PUBLIC RIGHTS-OF-WAY UNLESS SHOWN OTHERWISE.
 4. NO NCGS MONUMENT WITHIN 2,000 FEET OF PROPERTY.
 5. NO FEMA FLOOD HAZARD AREAS PER FIRM NUMBER 3720184100J DATED MAY 2, 2006. FLOOD ZONE IS 'X'.
 6. PROPERTY IS ZONED NMX.
 7. THE COORDINATES SHOWN ON THIS PLAT WERE DERIVED BY VRS (VIRTUAL REFERENCE STATION) GPS USING DUAL FREQUENCY RECEIVER. THIS METHOD RESULTS IN (NAD 1983/2011) - (CORS 96) POSITIONS AND NAVD 88 (MSL) ELEVATIONS USING THE CONTINUOUSLY OPERATING STATIONS MAINTAINED BY NORTH CAROLINA GEODETIC SURVEY.

CURVE TABLE				
CURVE	RADIUS	LENGTH	CHORD DIRECTION	CHORD
C1	25.00	39.26	S75°00'53"W	35.35
C2	240.00	16.30	N58°08'43"W	16.29
C3	25.00	31.89	S10°48'51"E	29.77
C4	805.00	21.19	S26°28'55"W	21.19
C5	805.00	38.58	S28°36'33"W	38.58

LINE TABLE		
LINE	DIRECTION	DISTANCE
L13	N25°44'28"E	24.77

ANNEXATION CURVE TABLE				
CURVE	RADIUS	LENGTH	CHORD DIRECTION	CHORD
AC6	25.00	29.70	S15°38'27"E	27.99
AC7	850.00	22.37	N26°28'55"E	22.37
AC8	850.00	40.74	N28°36'32"E	40.73

ANNEXATION LINE TABLE		
LINE	DIRECTION	DISTANCE
A1	N29°58'36"E	107.90
A2	S59°49'01"E	118.16
A3	S53°58'36"E	68.74
A4	N34°31'22"E	56.40
A5	S37°41'58"W	30.46
A6	N62°18'15"W	101.47
A7	S64°11'62"E	45.00
A8	N25°43'39"E	73.92
A9	N25°43'40"E	314.23
A10	N25°44'28"E	24.77
A11	N29°58'36"E	186.08
A12	S60°01'24"E	45.00

AREA WITHIN RESERVOIR VIEW LANE =	12,909 SF OR 0.2963 AC
AREA WITHIN TRADITIONS GRANDE BLVD.=	109,092 SF OR 2.5044 AC
AREA WITHIN LOT P3 =	207,390 SF OR 4.7610 AC
TOTAL AREA TO BE ANNEXED =	329,391 SF OR 7.5617 AC

RECORDED IN
BOOK OF MAPS ____ PAGE ____

SCALE: 1" = 100'

REV.	DATE	DESCRIPTION	BY
1	02-10-22	REVISED PER COMMENTS #1	DCR

BASS, NIXON & KENNEDY, INC.
CONSULTING ENGINEERS

- 6310 CHAPEL HILL ROAD, SUITE 250
- RALEIGH, NORTH CAROLINA 27607
- TELEPHONE: (919)851-4422 OR (800)354-1879
- FAX: (919)851-8968
- CERTIFICATION NUMBERS: NCBELS (C-0110); NCBLA (C-0267)

SURVEYED BY
MG

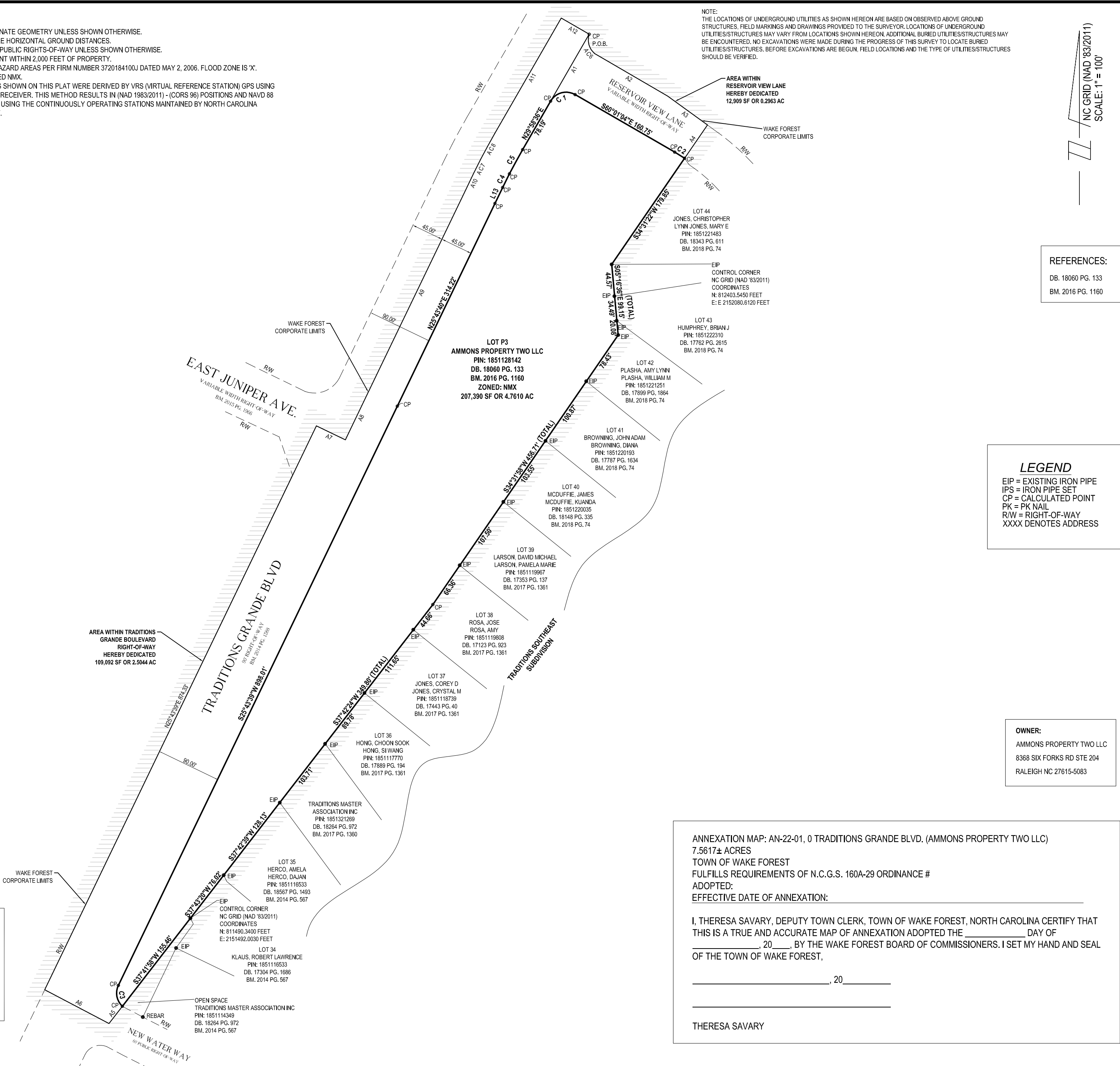
DRAWN BY
DCR

CHECKED BY
DG

DATE
01/13/2022

ANNEXATION MAP
PROPERTY OF
AMMONS PROPERTY TWO LLC
PIN: 1851128142
0 TRADITIONS GRANDE BOULEVARD
CASE: AN-22-01
WAKE FOREST WAKE COUNTY NORTH CAROLINA

SHEET
1
OF
1



REFERENCES:
DB. 18060 PG. 133
BM. 2016 PG. 1160

LEGEND
EIP = EXISTING IRON PIPE
IPS = IRON PIPE SET
CP = CALCULATED POINT
PK = PK NAIL
R/W = RIGHT-OF-WAY
XXXX DENOTES ADDRESS

OWNER:
AMMONS PROPERTY TWO LLC
8368 SIX FORKS RD STE 204
RALEIGH NC 27615-5083

ANNEXATION MAP: AN-22-01, 0 TRADITIONS GRANDE BLVD. (AMMONS PROPERTY TWO LLC)
7.5617± ACRES
TOWN OF WAKE FOREST
FULFILLS REQUIREMENTS OF N.C.G.S. 160A-29 ORDINANCE #
ADOPTED:
EFFECTIVE DATE OF ANNEXATION: _____

I, THERESA SAVARY, DEPUTY TOWN CLERK, TOWN OF WAKE FOREST, NORTH CAROLINA CERTIFY THAT THIS IS A TRUE AND ACCURATE MAP OF ANNEXATION ADOPTED THE _____ DAY OF _____, 20____, BY THE WAKE FOREST BOARD OF COMMISSIONERS. I SET MY HAND AND SEAL OF THE TOWN OF WAKE FOREST,

_____, 20____

THERESA SAVARY



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: 01/14/2022

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)*:

See attached map and description.

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.

Ammons Property Two, LLC	8368 SIX FORKS RD STE 204 RALEIGH NC 27615-5083		3/8/22
Name	Address	Signature	Date
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.

ORDINANCE 2022-

AN ORDINANCE TO EXTEND THE CORPORATE LIMITS OF THE TOWN OF WAKE FOREST, NORTH CAROLINA

(Contiguous annexation submitted by Ammons Property Two LLC for property associated with Traditions Townhomes located at 0 Traditions Grande Boulevard being Wake County PIN 1851-12-8142 and adjacent rights-of-way being approximately 7.5617 acres.)

WHEREAS, the Board of Commissioners has adopted a resolution under N.C.G.S. 160A-31, as amended, stating its intent to annex the area described below; and

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

WHEREAS, the Deputy Town Clerk has certified the sufficiency of said petition and a public hearing on the question of this annexation was held at the Town of Wake Forest Town Hall at 6:00 p.m. on April 19, 2022, after due notice by publication on April 8, 2022; and

WHEREAS, the Board of Commissioners does hereby find as a fact that said petition meets the requirements of N.C.G.S. 160A-31, as amended;

NOW, THEREFORE, BE IT ORDAINED by the Board of Commissioners of the Town of Wake Forest, North Carolina:

Section 1. By virtue of the authority granted by N.C.G.S. 160A-31, as amended, the following described territory is hereby annexed and made part of the Town of Wake Forest as of the 19th day of April, 2022.

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

Section 2. Upon and after the 19th day of April, 2022, the territory and its citizens and property shall be subject to all debts, laws, ordinances, and regulations in force in the Town of Wake Forest and shall be entitled to the same privileges and benefits as other parts of the

Town of Wake Forest. Said territory shall be subject to municipal taxes according to N.C.G.S. 160A-58.10.

Section 3. The Mayor and the Town of Wake Forest shall cause to be recorded in the office of the Register of Deeds of Wake County, and in the office of the Secretary of State at Raleigh, North Carolina, an accurate map of the annexed territory, described in Section 1 hereof, together with a duly certified copy of this ordinance.

This the 19th day of April, 2022.

Mayor: _____

APPROVED AS TO FORM:

Town Attorney

ATTEST:

Deputy Town Clerk



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-414-

Submitted by: Sherry Scoggins

Submitting Department: Administration

Meeting Date: April 19, 2022

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 5 minutes. Please provide the clerk with copies of any handouts you have for the Board. Although the Board is interested in hearing your concerns, speakers should not expect Board action or deliberation on subject matter brought up during the Public Comment segment. Topics requiring further investigation will be referred to the appropriate Town Staff and may be scheduled for a future agenda. Thank you for your consideration of the Board of Commissioners, staff and other speakers.

Recommendation:

Item Summary:

ATTACHMENTS

-



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-528-

Submitted by: Allison Snyder

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Updates to the Town of Wake Forest Record Retention Policy to incorporate Program Records.

Recommendation:

Approval of updated 2021 Program Records Policy.

Item Summary:

ATTACHMENTS

- [Summary_Updates to Records Retention_Incorporate Program Records.docx](#)
- [Attachment 1 Program Records Schedule Local Government.pdf](#)
- [Resolution2022-20AdoptingThe2021ProgramRecordsScheduleApril202219.pdf](#)

Updates to the Town of Wake Forest Record Retention Policy to incorporate Program Records.

Wake Forest is subject to the requirements of the North Carolina Public Records Act. The Local Government Records Section was created to assist local government agencies in managing public records. On October 1, 2021, an updated Retention Schedule for general records and program records was issued by the State. The Town adopted the General Records Schedule: Local Government Agencies in December 2021. We also need to adopt the Program Records Schedule: Local Government Agencies. We are requesting to adopt the Program Records Schedule tonight.

These schedules are an agreement between the local government agency and the Department of Natural and Cultural Resources serving as the inventory and schedule. Following local approval, procedures and policies will be filed with the State.

Attachment 1 Program Records Schedule Local Government
Attachment 2: Resolution adopting Programs Records Schedule

RECORDS RETENTION AND DISPOSITION SCHEDULE

PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Issued By:



NC DEPARTMENT OF
NATURAL AND CULTURAL RESOURCES

North Carolina Department of Natural and Cultural Resources
Division of Archives and Records
Government Records Section

October 1, 2021

CONTENTS

Approval	iv
Front Matter	
Executive Summary	v
Legend for Records Schedule	vi
Records Retention and Disposition Schedule	
Standard 10: Airport Authority Records	1
Standard 11: Animal Services Records	3
Standard 12: Code Enforcement and Inspection Records	5
Standard 13: Emergency Medical Services and Fire Department Records	12
Standard 14: Parks and Recreation Records	16
Standard 15: Planning and Regulation of Development Records	19
Standard 16: Public Housing Authorities, Redevelopment Commissions, and Entitlement Communities Records	25
Standard 17: Public Transportation Systems Records	31
Standard 18: Public Utilities and Environmental/Waste Management Records	34
Standard 19: Street Maintenance, Public Works, and Engineering Records	46
Standard 20: Law Enforcement Records (excluding Sheriff's Office)	53
Standard 21: Tax Records (for municipalities)	73
Appendix	
Managing Public Records in North Carolina	A-1
Audits, Litigation, and Other Official Actions	A-5
Transitory Records	A-6
Destruction of Public Records	A-8
Sample Destructions Log	A-10
Electronic Records: E-mail, Born Digital Records, and Digital Imaging	A-11
Geospatial Records	A-13
Security Preservation Record Copies	A-15
Disaster Assistance	A-17
Staff Training	A-18
Request Forms	
Request for Change in Records Schedule	A-19
Request for Disposal of Unscheduled Records	A-20
Request for Disposal of Original Records Duplicated by Electronic Means	A-21
File Plan	A-22
Index	A-23

Program Records Schedule: Local Government Agencies

The records retention and disposition schedules and retention periods governing the records series listed herein are hereby approved. This approval extends to and includes the following standards in the **2021 Program Records Schedule: Local Government Agencies**:

10. Airport Authority Records
11. Animal Services Records
12. Code Enforcement and Inspection Records
13. Emergency Medical Services and Fire Department Records
14. Parks and Recreation Records
15. Planning and Regulation of Development Records
16. Public Housing Authorities, Redevelopment Commissions, and Entitlement Communities Records
17. Public Transportation Systems Records
18. Public Utilities and Environmental/Waste Management Records
19. Street Maintenance, Public Works, and Engineering Records
20. Law Enforcement Records (excluding Sheriff's Offices)
21. Tax Records (for municipalities)

In accordance with the provisions of Chapters 121 and 132 of the *General Statutes of North Carolina*, it is agreed that the records do not and will not have further use or value for official business, research, or reference purposes after the respective retention periods specified herein and are authorized to be destroyed or otherwise disposed of by the agency or official having custody of them without further reference to or approval of either party to this agreement.

Destructions

N.C. Gen. Stat. § 121-5 authorizes the Department of Natural and Cultural Resources to regulate the destruction of public records. Furthermore, the local government agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of destruction. The North Carolina Administrative Code states:

“(a) Paper records which have met their required retention requirements and are not subject to legal or other audit holds should be destroyed in one of the following ways:

1. burned, unless prohibited by local ordinance;
2. shredded, or torn up so as to destroy the record content of the documents or material concerned;
3. placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned; or
4. sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

(b) When used in an approved records retention and disposition schedule, the provision that electronic records are to be destroyed means that the data and metadata are to be overwritten, deleted, and unlinked so the data and metadata may not be practicably reconstructed.

(c) When used in an approved records retention and disposition schedule, the provision that confidential records of any format are to be destroyed means the data, metadata, and physical media are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.”

All local government agencies should maintain logs of their destructions either in the minutes of their governing board or in their Records Management file. Confidential records will be destroyed in such a manner that the records cannot be practicably read or reconstructed.

Public records, including electronic records, not listed in this schedule are not authorized to be destroyed.

Audits and Litigation Actions

Records subject to audit or those legally required for ongoing official proceedings must be retained until released from such audits or official proceedings, notwithstanding the instructions of this schedule.

Electronic Records

All local government agencies and the Department of Natural and Cultural Resources concur that the long-term and/or permanent preservation of electronic records requires additional commitment and active management by the agency. Agencies agree to comply with all policies, standards, and best practices published by the Department of Natural and Cultural Resources regarding the creation and management of electronic records.

Local government agencies should consider retention requirements and disposition authorities when designing and implementing electronic records management systems. Any type of electronically-created or electronically-stored information falls under the North Carolina General Assembly's definition of public records cited above. For example, e-mail, text messages, blog posts, voicemails, websites, word processing documents, spreadsheets, databases, and PDFs all fall within this definition of public records. In addition, N.C. Gen. Stat. § 132-6.1(a) specifies:

“Databases purchased, leased, created, or otherwise acquired by every public agency containing public records shall be designed and maintained in a manner that does not impair or impede the public agency's ability to permit the public inspection and examination of public records and provides a means of obtaining copies of such records. Nothing in this subsection shall be construed to require the retention by the public agency of obsolete hardware or software.”

Local government agencies may scan any paper record and retain it electronically for ease of retrieval. If an agency wishes to destroy the original paper records before their assigned retention periods have been met, the agency must establish an electronic records policy, including putting into place procedures for quality assurance and documentation of authorization for records destructions approved by the Government Records Section. This electronic records policy and releases for destruction of records must be approved by the Government Records Section. Agencies should be aware that for the purpose of any audit, litigation, or public records request, they are considered the records custodian obligated to produce requested records, even if said records are being maintained electronically by an outside vendor. Therefore, contracts regarding electronically stored information should be carefully negotiated to specify how records can be exported in case a vendor goes out of business or the agency decides to award the contract to a different vendor.

Reference Copies

All local government agencies and the Department of Natural and Cultural Resources agree that certain records series possess only brief administrative, fiscal, legal, research, and reference value. These records series have been designated by retention periods that allow these records to be destroyed when “*reference value ends*.” All local government agencies hereby agree that they will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction “*destroy when reference value ends*.” If a local government agency does not establish internal policies and retention periods, the local government agency is not complying with the provisions of this retention schedule and is not authorized by the Department of Natural and Cultural Resources to destroy the records with the disposition instruction “*destroy when reference value ends*.”

Record Copy

A record copy is defined as “The single copy of a document, often the original, that is designated as the official copy for reference and preservation.”¹ The record copy is the one whose retention and disposition is mandated by these schedules; all additional copies are considered reference or access copies and can be destroyed when their usefulness expires. In some cases, postings to social media may be unofficial copies of information that is captured elsewhere as a record copy (e.g., a press release about an upcoming agency event that is copied to various social

¹ Society of American Archivists, *Dictionary of Archives Terminology*.

media platforms). Appropriately retaining record copies and disposing of reference copies requires agencies to designate clearly what position or office is required to maintain an official record for the duration of its designated retention period.

Transitory Records

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”²

North Carolina has a broad definition of public records. However, the Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called transitory records. They may be disposed of according to the guidance below. However, all public employees should be familiar with their appropriate retention schedule and any other applicable guidelines for their office. If there is a required retention period for these records, that requirement must be followed. When in doubt about whether a record is transitory or whether it has special significance or importance, retain the record in question and seek guidance from a DNCR records analyst.

Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed. Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails and calendar invites) have minimal value once the official action these records are supporting has been completed and documented. These records may be destroyed or otherwise disposed of once the action has been resolved.

Drafts and working papers, including notes and calculations, are materials gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of Chapter 132 of the General Statutes, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents that may be destroyed after final approval include:

- Drafts and working papers for internal and external policies
- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports;
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that is already formally documented.

Forms used solely to create, update, or modify records in an electronic medium may be destroyed in office after completion of data entry and after all verification and quality control procedures, so long as these records are not required for audit or legal purposes. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g., a signature or notary’s seal), they must be retained according to the disposition instructions for the records series encompassing the forms’ function.

It is further agreed that these records may not be destroyed prior to the time periods stated; however, for sufficient reason they may be retained for longer periods. These schedules supersede previous versions of these schedules and any localized amendments; they are to remain in effect from the date of approval until they are reviewed and updated.

² Ibid.

APPROVAL RECOMMENDED

Municipal/County Clerk or Manager
Title: _____



Sarah E. Koonts, Director
Division of Archives and Records

APPROVED

Head of Governing Body
Title: _____



D. Reid Wilson, Secretary
Department of Natural and Cultural
Resources

County/Municipality: _____

Effective: October 1, 2021

EXECUTIVE SUMMARY

- ✓ Some records are covered by the *General Records Schedule: Local Government Agencies* and, therefore, are not listed separately here.
- ✓ According to N.C. Gen. Stat. § 121-5(b) and N.C. Gen. Stat. § 132-3, you may destroy public records only with the consent of the Department of Natural and Cultural Resources (DNCR). The State Archives of North Carolina is the division of DNCR charged with administering a records management program. This schedule is the primary way the State Archives of North Carolina gives its consent. Without approving this schedule, your agency is obligated to obtain the State Archives of North Carolina's permission to destroy *any* record, no matter how insignificant.
- ✓ Each records series listed on this schedule has specific disposition instructions that will indicate how long the series must be kept in your office. In some cases, the disposition instructions are simply "retain in office permanently," which means that those records must be kept in your office forever. In other cases, the retention period may be "destroy in office when reference value ends." An agency may have reference copies of materials, meaning "a copy of a record distributed to make recipients aware of the content but not directing the recipient to take any action on the matter" (from Society of American Archivists, *Dictionary of Archives Terminology*). Your agency must establish and enforce internal policies by setting minimum retention periods for the records that the State Archives of North Carolina has scheduled with the disposition instructions, "destroy when reference value ends."
- ✓ E-mail is a record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. It is the content of the e-mail that is critical when determining the retention period of a particular e-mail, including attachments, not the media in which the record was created. It is important for all agency employees and officials to determine the appropriate records series for specific e-mails and retain them according to the disposition instructions listed with the identified record series.
- ✓ The State Archives of North Carolina recommends that all agency employees and officials view the tutorials that are available online through the State Archives website in order to familiarize themselves with records management principles and practices. The State Archives of North Carolina's online tutorials include topics such as records management and scanning guidelines.
- ✓ The State Archives of North Carolina creates security preservation record copies for minutes and selected other records of governing bodies and commissions, adoption records, and maps and plats. Agencies can request copies of the digital images made during this process. Contact the appropriate Records Management Analyst to begin this process.
- ✓ If you have records that are not listed in this schedule, contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do not have historical value, we will ask you to complete a [Request for Disposal of Unscheduled Records](#) (page A-19) for records that are no longer being created.

LEGEND FOR RECORDS SCHEDULE

This records retention and disposition schedule applies to records in all media, unless otherwise specified.



– symbol designating that one or more records in this series may be confidential or Includes confidential information.

Item # – an identifying number assigned to each records series for ease of reference.

Series – “a group of similar records that are . . . related as the result of being created, received, or used in the same activity.” (From Society of American Archivists, *Dictionary of Archives Terminology*). Series in this schedule are based on common functions in government offices.

Records Series Title – a short identification of the records in a series, based on their common function.

Series Description – a longer description of the records in a series, often including the types of records that can frequently be found in that series. This information is included underneath the Records Series Title.

Disposition Instructions – instructions dictating the length of time a series must be retained and how the office should dispose of those records after that time.

Citation – a listing of references to statutes, laws, and codes related to the records series. Citations can include:

- Authority: governing the creation of records
- Confidentiality: limiting access to public records
- Retention: setting a retention period

Throughout this schedule, items that cross-reference other items within this schedule are indicated with a SEE ALSO reference. If you hover your cursor over one of these items, you will see the hand tool that will enable you to click on the item to follow the link to that location.

AUDITS: PERFORMANCE

Records concerning internal and external audits conducted to assess the function of government programs. Includes reports, working papers, corrective measures, and other related records.

SEE ALSO: Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).

Sample records series title and description with cross-reference included

No destruction of records may take place if litigation or audits are pending or reasonably anticipated. See also AUDITS, LITIGATION, AND OTHER OFFICIAL ACTIONS, page A-5.

STANDARD 10: PROGRAM OPERATIONAL RECORDS – AIRPORT AUTHORITY RECORDS

Official records and materials created and accumulated incidental to the operation of a county or municipal airport.

ITEM #	STANDARD 10: AIRPORT AUTHORITY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
10.01	ACCESS CONTROL RECORDS Records concerning employee or contractor access to facilities or resources.	Destroy in office 1 year after expiration.	
10.02	AIR SPACE CONSTRUCTION Applications to construct structures which may obstruct flight space. Includes correspondence and related records.	Destroy in office after 5 years.	
10.03	AIRFIELD INSPECTION Records concerning airfield inspections on runway conditions, fueling agents, fire and rescue facilities, ground vehicle control and other airport condition information.	Destroy in office after 1 year.	Authority/Retention: 14 CFR 139.301
10.04	AIRPORT MASTER RECORD Federal Aviation Administration (FAA) form 5010 documenting basic information concerning airports.	Destroy in office when superseded or obsolete.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 10: AIRPORT AUTHORITY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
10.05	LAND DEVELOPMENT AND PLANNING STUDIES AND REPORTS Records documenting local government and airport authority land use and development planning.	Retain in office permanently.	
10.06	RADIO LOGS Records of radio calls received and placed.	Destroy in office after 1 year.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

STANDARD 11: PROGRAM OPERATIONAL RECORDS – ANIMAL SERVICES RECORDS

Records created and received during the conduct of animal services programs.

NOTE: Some records are covered by General Records Schedule: Local Government Agencies and, therefore, are not listed separately here. See Reference (Reading) File and Reports and Studies (Administration and Management Records).

ITEM #	STANDARD 11: ANIMAL SERVICES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
11.01	ANIMAL ABUSE AND CRUELTY RECORDS Includes complaints, citations and/or compliance orders, and other related records.	Destroy in office after 5 years.*	See G.S. 14-360 for definition of animal cruelty.
11.02	ANIMAL COMPLAINT RECORDS Includes complaints of animal nuisances.	Destroy in office after 3 years.*	
11.03	ANIMAL CONTROL RECORDS Records of animal control calls. Includes information regarding animal bites, animals received from residents, strays caught, animals taken to shelter or returned to owner, use of tranquilizer guns, and other related records. Also includes citations and/or compliance orders issued to animal owners for violations of government ordinances.	a) Destroy in office records concerning dangerous animals when known dead or after 10 years. b) Destroy in office animal control citations and compliance orders after 3 years.* c) Destroy in office remaining records after 1 year.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 11: ANIMAL SERVICES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
11.04 	ANIMAL LICENSING RECORDS Records concerning the licensing of dogs, cats, and other animals. Includes owner and animal information and record of fees paid.	Destroy in office after 3 years.*	Confidentiality: G.S. 132-1.2 (2)
11.05 	ANIMAL SHELTER RECORDS Records of animals impounded at the shelter, including date of impoundment, length of impoundment, disposition of animal, and any other information required by rules adopted by the State Board of Agriculture. Also includes certificates of animal release (e.g., adoption, reclaim, transfer, return to field) and owner contact records.	Destroy in office 3 years after date of impoundment.	Authority/Retention: G.S. 19A-32.1(j) Confidentiality (for specific counties): G.S. 132-1.15
11.06	CONTROLLED SUBSTANCE EUTHANASIA LOG Includes amount of controlled substances used.	Destroy in office after 2 years.	Retention: 21 CFR 1304.04
11.07	HISTORIES OF PET OWNERS Records concerning information for each animal owner who violates government ordinances. Includes complaint forms and other related records.	Destroy in office after 3 years.*	
11.08	RABIES VACCINATION RECORDS Includes rabies vaccination certificates submitted to agency by area veterinarians.	Destroy in office after 3 years.	Authority: G.S. 130A-189

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

STANDARD 12: PROGRAM OPERATIONAL RECORDS – CODE ENFORCEMENT AND INSPECTION RECORDS

Official records and materials created and accumulated during the conduct of local government code enforcement and inspection programs.

NOTE: Some records are covered by the General Records Schedule: Local Government Agencies and, therefore, are not listed separately here.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.01	AIR POLLUTION SOURCE INFORMATION Includes records for facilities which are no longer operational.	Destroy in office after 2 years.*	
12.02	 BLUEPRINTS AND SPECIFICATIONS Records concerning blueprints and specifications of local government owned buildings and facilities, or drawings submitted when applying for a building permit for new construction. Includes as-built plans and related records concerning approved changes or used in determining code compliance and enforcement of building code. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Blueprints and Specifications (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain agency blueprints and specifications for life of structure. b) Destroy in office commercial blueprints and specifications 1 year after completion of project. c) Destroy in office residential blueprints and specifications when reference value ends.± Agency Policy: Destroy in office after <u>retain digital records</u>	Confidentiality: G.S. 132-1.7

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.03	BUILDING AND ROAD PERMITTING AND INSPECTION RECORDS Records documenting applications for permits from property owners to erect new structures or manufactured homes, or to make structural modifications, demolition, fire permits, or the installation of plumbing, electrical, or mechanical systems. Includes permits, inspection reports, inspector's worksheets, inspection requests, denial reports, sketches, correspondence (including e-mail), and contractor change forms.	a) Destroy in office permits, applications, and inspection reports (or worksheets) 6 years after Certificate of Occupancy is issued or project is complete (inactive). b) Destroy in office Certificate of Occupancy 6 years after permit is expired. c) Destroy in office remaining records, including applications for which a permit was never issued, when reference value ends.± Agency Policy: Destroy in office after <u>retain digital records</u>	
12.04	CONTROLLED SUBSTANCE LABS DECONTAMINATION RECORDS Records concerning decontamination compliance.	Destroy in office 3 years after documented decontamination is complete.	
12.05	DROUGHT CONTINGENCY PLANS Includes water conservation plans in the event of a drought.	Destroy in office when superseded or obsolete.	
12.06	EROSION AND SEDIMENT CONTROL ENFORCEMENT CASES Includes settled legal matters and penalties. SEE ALSO: Violations: Building and Housing, below.	Destroy in office 6 years after settlement.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.07	EROSION AND SEDIMENT CONTROL PLANS Includes approved and disapproved plans as well as revisions and addenda.	a) Destroy in office approved plans 6 years after approval or last revision and/or addendum. b) Destroy in office non-approved plans after 3 years.	
12.08	EXEMPTION (VARIANCE) RECORDS Records concerning exemptions and variances concerned with the installation of water, sewer, gas, or electric lines.	a) Destroy in office 5 years after expiration.* b) Destroy in office records for which an exemption or variance was not issued after 3 years.	Retention: 40 CFR 141.33 15A NCAC 18C .1526
12.09	GOING-OUT-OF-BUSINESS LICENSES Records concerning licenses granted to business to hold going out of business, water and smoke damage, and distress sales.	Destroy in office 1 year expiration.	
12.10	GROUNDWATER MONITORING RECORDS Includes all groundwater monitoring wells and associated groundwater surface elevations.	Destroy in office after 5 years.*	Authority: 15 NCAC 2C .0100
12.11	ILLEGAL DUMPING FILE Records concerning illegal dumping complaints received. SEE ALSO: Violations: Solid Waste Management, below.	Destroy in office after 5 years.*	
12.12	INSPECTIONS Inspections conducted by local government agencies concerning enforcement of state and local laws, codes, and ordinances.	Destroy in office after 6 years.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.13	LEAD AND COPPER COMPLIANCE RECORDS Includes all monitoring records required by federal, state, and local regulations.	Destroy in office after 12 years.*	Retention: 40 CFR 141.91
12.14	LANDFILL TONNAGE AND COST FILE	Destroy in office after the 5 year reporting period is complete.	
12.15	PERMITS: CONSTRUCTION Records documenting applications and permits regarding sign installation, fencing, swimming pools, driveways, or similar activity required by local ordinance. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Miscellaneous (Non-Building) Applications, Licenses, and Permits (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy in office 3 years after completion of project. b) Destroy in office applications for which a permit was never issued when reference value ends.± Agency Policy: Destroy in office after <u>retain digital records</u>	
12.16 	PERMITS: PUBLIC UTILITIES PROJECTS Records documenting permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute. Includes records regarding National Pollutant Discharge Elimination System (NPDES) permits.	a) Retain in office approval letters and supporting documentation permanently. b) Destroy in office permits 6 years after expiration, cancellation, revocation, or denial.*	Authority: 40 CFR 122.28 15A NCAC 18C .0300 Confidentiality: 15A NCAC 02H .0115

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.17	RECREATIONAL VEHICLE REGISTRATION RECORDS Records concerning issuance of registrations/decals for recreational vehicles. Includes, but is not limited to, golf carts, canoes, and mopeds as well as proof of insurance and renewals.	Destroy in office 1 year after expiration.*	
12.18	UNSAFE BUILDINGS FILE Records documenting inspections and notifications to owners of unsafe conditions relative to a particular structure. SEE ALSO: Violations: Building and Housing, below.	Destroy in office after 6 years provided all issues have been resolved.*	
12.19	VALVE OPERATION FILE	Destroy in office when reference value ends. $\pm$ Agency Policy: Destroy in office after <u>n/a</u>	
12.20	VIOLATIONS: BUILDING AND HOUSING Records documenting violations of building and fire code, minimum housing, and erosion and sediment control. Includes complaints, summons, notices, appeals, and other information created or compiled during the course of investigation and resolution of each alleged violation. SEE ALSO: Water Analysis, below.	a) Destroy building code violations in office 6 years after verification of correction. b) Destroy remaining records in office 3 years after verification of correction.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

$\pm$ The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.21	VIOLATIONS: SOLID WASTE MANAGEMENT Includes complaints, notices of violations, citations, investigation records, court documents, and other related records issued by solid waste environmental enforcement programs.	Destroy in office 7 years after resolution of case.*	
12.22	VIOLATIONS: WATER CONSERVATION Records concerning notices of water conservation violations.	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>n/a</u>	
12.23	WASTEWATER POLLUTION CONTROL AND ABATEMENT RECORDS	Destroy in office after 5 years.*	Authority: 15A NCAC 2B .0505
12.24	WASTEWATER QUALITY ANALYSIS RECORDS	a) Destroy in office analysis reports after 3 years.* b) Destroy in office monitoring and calculation sheets after 1 year.*	Authority: 15A NCAC 2B .0505

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ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.25	WATER ANALYSIS Records concerning bacteriological, chemical, radiological, and physical analyses and climatological observations as well as records of actions taken to correct violations. SEE ALSO: Violations: Building and Housing and Violations: Water Conservations, above.	a) Destroy in office records of chemical and radiological analysis after 10 years. b) Destroy in office records of bacteriological and turbidity analysis after 5 years. c) Destroy in office records of actions taken to correct violations 3 years after last corrective action taken. d) Destroy in office remaining records after 5 years.	Retention: 40 CFR 141.33 15A NCAC 18C .1526
12.26	WATER SYSTEM OPERATIONS RECORDS Records concerning the operations of water supply, treatment, distribution, and collection. Includes backflow prevention reports, flow reports, capacity studies, pump station reports, and similar records that summarize	Destroy in office after 10 years.	Retention: 40 CFR 141.33 15A NCAC 18C .1526
12.27	WATER TANKS, SPECIFICATIONS, AND BOOSTER STATIONS FILE	Destroy in office after 5 years.*	

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STANDARD 13: PROGRAM OPERATIONAL RECORDS – EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS

Official records documenting the primary functions of emergency services programs and fire departments.

Footage from body-worn cameras is scheduled by the content captured or the purpose of the footage rather than by its format. Recordings may fit under FIRE INVESTIGATION CASE FILES, DISPATCH RECORDS AND RECORDINGS, PUBLICITY RECORDS (General Schedule), TRAINING AND EDUCATIONAL RECORDS (General Schedule), and other items as appropriate. Footage is only confidential if it fits within an item where confidentiality is conferred by state or federal statute.

ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.01 	911 COMMUNICATION RECORDS AND RECORDINGS Records documenting any communications made by the public with 911. Includes transcripts and recordings of 911 calls received, transcripts of text messages received by 911, and computer-aided dispatch (CAD) reports. SEE ALSO: Dispatch Records and Recordings, below AND PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Communication Records (STANDARD 20: LAW ENFORCEMENT RECORDS)	Destroy in office after 30 days, if not made part of a case file.*	Confidentiality: G.S. 132-1.5 G.S. 132-1.4(c)(4) Retention: G.S. 132-1.4(i)
13.02 	AMBULANCE CALL REPORTS (ACR)/PATIENT CARE REPORTS (PCR) Records concerning equipment used, patient location, nature of call, vital signs and other physical signs, care rendered, medicine ordered, etc.	a) Transfer copy of report to the admitting hospital for inclusion into patient's medical record. b) Destroy original in office after 3 years.*	Confidentiality: G.S. 130A-12

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ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.03	BUILDING AND FIRE SAFETY SYSTEM PLANS Records concerning plans and fire safety systems of commercial, industrial, and government-owned properties.	Destroy in office when superseded or obsolete.	
13.04	 DISPATCH RECORDS AND RECORDINGS Records and recordings concerning activities during an emergency services dispatch. Includes company run reports and fire journals as well as ambulance dispatch and service run records. Also includes footage from body-worn cameras of EMS and Fire Department personnel when responding to an emergency if not otherwise included in a separate item. SEE ALSO: 911 Communication Records and Recordings, above AND PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Communication Records (STANDARD 20: LAW ENFORCEMENT RECORDS).	Destroy in office after 30 days, if not made part of a case file.*	Confidentiality: G.S. 132-1.4 G.S. 143-518 45 CFR 164.501 42 U.S.C. 1395x
13.05	FIRE ALARM AND AUTOMATIC EXTINGUISHER FILE Records documenting licenses and insurance certificates of companies that perform installations of fire alarm and automatic extinguishing systems.	Destroy in office when superseded or obsolete.	
13.06	FIRE DISPATCH FILE Records concerning fire dispatch zones. Includes maps of fire dispatch zones, census tract information, annexation research, street closings, and other related material.	Destroy in office when superseded or obsolete.	

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ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.07	FIRE INVESTIGATION CASE FILES Records concerning investigations of fire. Includes reports, photographs, evidence, and other related records.  SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Case File: Felonies AND Case File: Misdemeanors (STANDARD 20: LAW ENFORCEMENT RECORDS).	a) Retain in office permanently when loss of life occurs or if a publicly-owned building is involved.* b) Destroy in office after 10 years when arson is involved.* c) Destroy in office after 5 years when cause of fire is determined to be accidental and no loss of life occurs.*	Confidentiality: G.S. 132-1.4
13.08	FIRE SAFETY INSPECTIONS AND PERMITS Records documenting inspections of and permits issued for fire protection measures and procedures for systems and buildings.	a) Destroy in office inspections with no defects after 3 years. b) Destroy in office inspections with noted defects 3 years after defects are corrected.* c) Destroy in office permits 3 years after expiration.	
13.09	NORTH CAROLINA FIRE INCIDENT REPORT Includes report required by state statute to document certain fire incidents. <i>For retention of copies of fire incident reports filed with other agencies, see: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Reports (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</i>	Retain original report permanently.	Authority/Retention: G.S. 58-79-45

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ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.10 	PHARMACEUTICAL AND NARCOTICS RECORDS Records documenting the administration of pharmaceuticals and narcotics to patients as required by the Drug Enforcement Agency.	Destroy in office after 3 years.*	Authority: 21 CFR 1310.03 Confidentiality: G.S. 130A-12 Retention: 21 CFR 1310.04

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STANDARD 14: PROGRAM OPERATIONAL RECORDS – PARKS AND RECREATION RECORDS

Records created and received by Parks and Recreation departments.

ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.01	ADMISSION RECORDS Records of admissions to parks or recreation facilities.	Destroy in office after 3 years.*	
14.02	CITATIONS RECORDS Citations issued by park personnel to persons who violate park rules and regulations.	Destroy in office after 2 years.	
14.03	OFFICIALS FILE Records concerning individuals who officiate games. Includes schedule and correspondence (including e-mail). SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Payroll and Earnings Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) or Seasonal and Contract Worker Records (STANDARD 4: HUMAN RESOURCES RECORDS) for disposition of payment records.	Destroy in office after 3 years.	

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ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.04	PARKS PLANNING FILE Records concerning master plans and working plans for each park property and recreational facility which show layout, topography, and proposed developments and improvements. Includes drainage and resource maps, aerial maps, site analysis drawings, construction plans, and as-built drawings. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS) AND GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps: Parks (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEMS (GIS) RECORDS).	a) If an element of the Strategic Plan, destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>n/a</u> b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.	
14.05	POOL RECORDS Records concerning monthly reports indicating operational data, chemicals used, chlorination levels and other information relating to pool construction, maintenance, and health and safety.	Destroy in office after 1 year.	
14.06	 RECREATION PROGRAMS Records concerning athletic and recreation programs. Includes staff notes, lesson plans, course descriptions, instruction manuals, schedules, team rosters, reservation records, copies of receipts for fees paid, age verification records, and concession operators list.	a) Destroy in office program records after 3 years. b) Destroy age verification records when reference value ends.± Agency Policy: Destroy in office after <u>a</u>	Confidentiality: G.S. 132-1.12

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ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.07	TICKET STUBS	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>n/a</u>	

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STANDARD 15: PROGRAM OPERATIONAL RECORDS – PLANNING AND REGULATION OF DEVELOPMENT RECORDS

Official records and materials created and accumulated during the conduct of local government planning, regulation of development, and zoning programs.

Community Development Block Grants (CDBG) records are found in Standard 16: Public Housing Authorities, Redevelopment Commissions, and Entitlement Communities Records.

NOTE: Some records are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here.

ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.01	BOARD OF ADJUSTMENT CASE FILES AND INDEXES Cases submitted to the board requesting variances from current zoning ordinances. Includes indexes to cases reviewed by the board.	a) Retain indices in office permanently. b) Destroy in office case files after 6 years.*	Retention: G.S. 1-50(5)

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.02	CERTIFICATES OF APPROPRIATENESS Certificates submitted by the Historic Preservation Commission allowing alterations to exterior portions of building and structures on or within historic landmarks and districts. Includes applications and other related records.	a) Retain in office certificates for life of structure and then destroy. b) Destroy in office denied applications when reference value ends. ± Agency Policy: Destroy in office after <u>5 yrs</u> c) Destroy in office remaining records when reference value ends. ± Agency Policy: Destroy in office after <u>5 yrs</u>	Authority: G.S. 160A-400.9
15.03	COMPREHENSIVE PLAN AND AMENDMENTS Official copies of comprehensive plan and all background surveys, studies, reports, draft versions of plans, and supporting documentation. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office permanently adopted plan and amendments. b) Destroy in office remaining records 3 years after adoption of plan.	

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ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.04	CONDITIONAL USE PERMIT RECORDS AND INDEX Records concerning applications for conditional use permits. Permits allow for the construction of buildings, on the condition that impacts on neighborhoods are mitigated. Includes original application, blueprint drawings, investigative reports, planning commission recommendations, cash receipts, and related correspondence (including e-mail). Also includes reference copies of variances or exceptions from zoning regulations granted by the Board of Adjustment.	a) Destroy in office 3 years after discontinuance of use. b) Destroy in office applications for which a permit was never issued when reference value ends. ± Agency Policy: Destroy in office after <u>2 years</u>	
15.05	DECLARATIONS AND BY-LAWS FROM TOWNHOUSES, CONDOMINIUMS, PLANNED RESIDENTIAL DEVELOPMENTS, COMMON AREAS, ETC.	a) If not filed in Register of Deeds or similar agency, retain in office permanently. b) If filed in Register of Deeds or similar agency, destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>2 years</u>	Authority: G.S. 47C-2-103
15.06	ENVIRONMENTAL IMPACT STUDIES Records and reports concerning the environmental impact of major projects proposed by localities and reviewed by local officials.	Retain in office permanently.	
15.07	OPEN SPACE CLASSIFICATION CASE FILE	Retain in office permanently.	

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ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.08	PERMITS: TEMPORARY MANUFACTURED HOME Records created to temporarily authorize the location of a manufactured home on the same lot as a single family residence.	Destroy in office 6 years after permit expires.	Retention: G.S. 1-50(5)
15.09	PERMITS: ZONING COMPLIANCE For residential uses, non-residential uses, and accessory structures.	a) Retain in office permits concerning subdivision, historical structure, major commercial or industrial development, or capital construction, where county or municipality is lead agency, permanently. b) Destroy in office permits concerning subdivision, historic structures, major commercial or industrial development, or capital construction, where county or municipality is not lead agency, 6 years after last entry. c) Destroy in office any other permits and related records 6 years after last entry.	Retention: G.S. 1-50(5)
15.10	PETITION & REGULATION RECORDS	Destroy in office after 5 years.*	

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ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.11	PLANNING REVIEW CASE FILE For required review of site plan, zoning variance, special permit, change of zoning, subdivision creation or enlargement, municipal or county planning action, or other required review; including, but not limited to, maps, plans, sketches, photographs, engineering reports, environmental impact statement and studies, copies of zoning records, project narrative, correspondence (including e-mail), and record of final determination.	a) Retain plan reviews and related records containing subdivision, historical structure, major commercial or industrial development, or capital construction, where county or municipality is lead agency, permanently. b) Destroy in office plan reviews and related records containing subdivision, historic structures, major commercial or industrial development, or capital construction, where county or municipality is not lead agency, 6 years after last entry. c) Destroy in office any other mandatory reviews and related records 6 years after last entry.	Retention: G.S. 1-50(c)
15.12	REZONING RECORDS AND INDEXES Records concerning applications to rezone property within the county or municipality. Includes original applications, review forms, maps of areas involved, copies of investigative reports, copies of relevant planning board minutes, notices of hearings, and development agreements.	Retain in office permanently.	

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ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.13	SUBDIVISION RECORDS Includes maps, plats, topographical data, names of streets, records of public utilities, action by council, etc. Also includes preliminary subdivision and group development site plans. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps: Plats (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEMS RECORDS).	a) If not filed in Register of Deeds or similar agency, retain in office permanently. b) If filed in Register of Deeds or similar agency, destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>2 years</u>	
15.14	VARIANCES Includes zoning variances, watershed variances, and subdivision variances.	Retain official copies permanently in the minutes of the Board of Adjustment or other governing body.	
15.15	VIOLATIONS: ZONING Records concerning notices of zoning violations.	Destroy in office after 6 years.*	Retention: G.S. 1-50(5)

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STANDARD 16: PROGRAM OPERATIONAL RECORDS – PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS

Official records and materials created and received by public housing authorities, redevelopment commissions, and entitlement communities operated by local government agencies. Where there is a local funding match required to qualify for grant programs, all records should be retained according to the grant requirements listed below.

NOTES: Some records, such as those for Section 8 assistance, are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here. See Bond Closing Records (Budget, Fiscal, and Payroll Records), Grants (Administration and Management Records), and Grants: Financial (Budget, Fiscal, and Payroll Records). 24 CFR Parts 50-58 lay out the environmental review responsibilities of entities but do not establish specific retention requirements, so these records should be handled in accordance with the requirements of the funding source.

ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.01	APPRAISAL PROJECT FILE Evaluations of properties and structures within proposed projects. File includes financial assessments of the worth of real estate and building within proposed project areas. File may also include assessments of architectural and historical significance and condition of the involved structures and real estate.	a) Retain records with historical value permanently. b) Destroy in office remaining records 5 years after completion of abandonment of project.*	

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.02	COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS Records concerning the administration of projects funded under the Community Development Block Grant (CDBG) program, including both direct grants and regrants. Includes applications, reports, audits, certificates, maps, and other related records.	a) Retain records with historical value permanently. b) Destroy in office rejected applications after 1 year. c) Destroy in office remaining records 4 years after execution of the closeout agreement for the grant.	Retention: 24 CFR 570
16.03	COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: OUTSTANDING LOAN BALANCES Records concerning individual activities under the Community Development Block Grant (CDBG) program for which there are outstanding loan balances, other receivables, or contingent liabilities. Includes reports, audits, and other related records.	a) For recipients, destroy in office 3 years after the receivables or liabilities have been satisfied. b) For subrecipients, destroy in office after such receivables or liabilities have been satisfied.	Retention: 24 CFR 570.502(a)(7)(i)(B)
16.04	COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: SUBJECT TO REVERSION OF ASSETS PROVISIONS OR CHANGE OF USE OF REAL PROPERTY Records concerning real property which was acquired or improved in whole or in part using Community Development Block Grant (CDBG) funds. Includes reports, audits, and other related records.	a) For recipients, destroy in office 3 years after these provisions no longer apply to the activity. b) For subrecipients, destroy in office when these provisions no longer apply to the activity.	Authority: 24 CFR 570.503(b)(7) 24 CFR 570.505 Retention: 24 CFR 570.502(a)(7)(i)(B)

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.05	CONTINUUM OF CARE RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes required Federal compliance records, program records, financial records, and other related records.	a) Destroy in office records documenting the acquisition, new construction, or rehabilitation of a project site 15 years after the date site is first occupied/used. b) Destroy in office program participant records 5 years after the expenditure of all funds from the grant under which the program participant was served. c) Destroy in office all remaining records after 5 years.	Retention: 24 CFR 578.103(c)
16.06	 CRIMINAL RECORDS CHECKS Records received by the local agency to screen applicants for admission to covered housing programs and for lease enforcement or eviction.	Destroy in office once the purpose for which the record was requested has been accomplished, including expiration of the period for filing a challenge to the PHA action without institution of a challenge or final disposition of any such litigation.	Confidentiality/ Retention: 24 CFR 5.903(g) 24 CFR 5.905(c)

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.07	EMERGENCY SOLUTIONS GRANTS (ESG) RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes case management records for program participants, required federal compliance records, program records, financial records, and other related records.	a) Destroy records supporting the expenditure of federal funds passed through NC Department of Health and Human Services (DHHS) on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions. b) Destroy in office records documenting renovation of an emergency shelter 10 years after the date that ESG funds are first obligated for the renovation. c) Destroy in office participant records 5 years after the expenditure of all funds from the grant under which the program participant was served. d) Destroy in office all remaining records after 5 years.	Confidentiality: 24 CFR 576.500(x) Retention: 24 CFR 576.500(y)
16.08	FAÇADE PROJECT FILES Records documenting the re-granting of funds received by the agency to restore exteriors of architecturally important structures in project areas. Includes contracts, photographs, and correspondence.	Retain in office permanently.	

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.09	HOME INVESTMENT PARTNERSHIPS PROGRAM RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes records concerning designation as a participating jurisdiction, program records, project records, Community Housing Development Organizations records, financial records, program administration records, records concerning other federal requirements, and other related records.	a) Destroy in office rental assistance records 5 years after termination of assistance.* b) Destroy in office written agreements 5 years after termination.* c) Destroy in office 5 years after the affordability period terminates records of individual tenant income verifications, projects rents and inspections, and documents imposing recapture/resale restrictions. d) Destroy in office records covering displacements and acquisition 5 years after final payment.* e) Destroy in office remaining records after 5 years.*	Authority/Retention: 24 CFR 92.508
16.10	HOUSING ASSISTANCE FOR PERSONS WITH DISABILITIES Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes verifications of disability, grant agreements, performance reports, and other related records.	Destroy in office 5 years after the end of the grant term.	Retention: 24 CFR 582.301(c) 24 CFR 583.305(c)

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.11	HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS (HOPWA) RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes grant agreements, performance reports, and other related records.	Destroy in office after 5 years.	Authority/Retention: 24 CFR 574 24 CFR 5.106(d)
16.12	LANDLORD MONITORING RECORDS Records documenting monitoring of landlords of properties used in affordable or subsidized housing programs. Includes certifications and forms and other compliance-related records.	Destroy in office after 5 years.	
16.13	REDEVELOPMENT PLANS Records concerning redevelopment projects. Includes documentation of the review and certification process.	a) Retain in office permanently records concerning approved redevelopment projects. b) Destroy in office remaining records 2 years after rejection.	

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STANDARD 17: PROGRAM OPERATIONAL RECORDS – PUBLIC TRANSPORTATION SYSTEMS RECORDS

Records received and created by area transit systems and authorities necessary to meet all statutory requirements.

NOTE: Some records are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here.

Comply with requirements of the Federal Transit Administration's **Best Practice Procurement Manual**, Master Agreement MA(11) Section 8 manual.

ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
17.01	AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT RECORDS Includes driver's daily assignments, dispatch records, logs of passenger pick-ups and drop-offs, manifests, trip requests, and appeal forms.	Destroy in office after 5 years.*	Authority: 2 CFR 200.333
17.02	AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT VOUCHERS Vouchers submitted by private transportation companies for reimbursement for alternative transportation of public transit clients.	Destroy in office after 5 years.*	Authority: 2 CFR 200.333
17.03	AMERICANS WITH DISABILITIES ACT (ADA) PRE-TRIP INSPECTION FORMS	Destroy in office after 1 year.	Authority: 2 CFR 200.333

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ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
17.04	APPLICATIONS FOR ART-IN-TRANSIT Applications and supporting documentation submitted by regional and national artists for exhibit on agency property.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>n/a</u>	
17.05	APPLICATIONS FOR DISCOUNT PASSES Applications, certificates of disability, and supporting documentation used to apply for discount passes.	Destroy in office 3 years after service is terminated or denied.	
17.06	APPLICATIONS FOR TRANSIT SERVICE Includes customer applications, eligibility assessment records, correspondence (including e-mail), health information, riders' guides, and related records.	Destroy in office 3 years after service is terminated or denied.	
17.07	CUSTOMER (RIDER) IDENTIFICATION RECORDS Records concerning customer identification, approvals, denials, and related information.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>n/a</u>	
17.08	DISADVANTAGED BUSINESS ENTERPRISE (DBE) RECORDS Includes company's articles of incorporation, financial statements, signed affidavits, letters of reference, declarations, Federal Schedule A or B, and related correspondence (including e-mail).	a) Destroy in office company-specific records 5 years after company is removed from certified list. b) Destroy in office related DBE program records, including Federal Transit Administration reports, 5 years from date record was created.	Authority: 2 CFR 200.333
17.09	OPERATOR SHIFT INSPECTION RECORDS Reports and similar records of operator's inspections of vehicle at the beginning and end of shift.	Destroy in office after 5 years.	Authority: 2 CFR 200.333

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ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
17.10	ROUTE HISTORY RECORDS Includes descriptions of routes, bus stops, passenger lists, and other related records.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>n/a</u>	
17.11	SEAT BELT AND RESTRAINT SYSTEM RECORDS Records concerning the use and installation of seat belts and other restraint systems in vehicles.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>n/a</u>	
17.12	TRANSIT SCHEDULES Printed route schedules and related information used to generate schedules.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>n/a</u>	
17.13	VANPOOL DRIVER APPLICATIONS Applications and supporting records submitted by persons operating vanpool vehicles.	a) Destroy in office accepted applications 3 years after person leaves program. b) Destroy in office applications for persons not accepted for program after 1 year.	

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STANDARD 18: PROGRAM OPERATIONAL RECORDS – PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS

Official records and materials created and accumulated for use by municipal and county sanitation, water, sewage, electrical, and gas operations. Also contains environmental management records accumulated for use by erosion and sediment control, flood control, and monitoring of pollution. Comply with applicable provisions of G.S. §132-1.7 regarding confidentiality of public infrastructure detailed plans and drawings.

ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.01	ENVIRONMENTAL: COMPREHENSIVE SOLID WASTE MANAGEMENT PLAN AND AMENDMENTS SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) If an element of the Strategic Plan, destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>n/a</u> b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.	Authority: G.S. 130A-309.09A
18.02	ENVIRONMENTAL: CUSTOMER USAGE RECORDS Includes reports, plans or similar records submitted by industrial users or publicly-owned treatment works concerning intended or actual use of the wastewater treatment system.	Destroy in office after 3 years.*	Retention: 40 CFR 403.12(o)(3)
18.03	ENVIRONMENTAL: DAILY DISPOSAL TICKETS Record and/or receipts concerning the disposal of materials at the landfill.	Destroy in office after 3 years.*	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.04	ENVIRONMENTAL: DISCHARGE MONITORING REPORTS Includes discharge and non-discharge monitoring reports submitted to state and/or federal regulatory agencies. Also includes copies of monthly reports required by National Pollution Discharge Elimination System (NPDES) permits.	a) Destroy in office NPDES reports 5 years from date of submission.* b) Destroy in office annual reports 5 years from date of submission.* c) Destroy in office daily reports after 3 years.	Retention: 40 CFR 122.41(3)(j)(2) 15A NCAC 2B .0506
18.05	ENVIRONMENTAL: LANDFILL MONITORING REPORTS Gas and groundwater monitoring records and reports. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain official reports permanently. b) Destroy in office remaining records after 3 years.	Retention: 15A NCAC 13B .1626(10)
18.06	ENVIRONMENTAL: LANDFILL OPERATIONAL PLAN Describes the intended schedule of construction, description of on-site waste handling procedures during active life of the facility, contingency plans, description of maintenance of installed equipment, and any other information pertaining to the operation, maintenance, monitoring, or inspections as may be required by federal and state law.	Destroy when superseded or obsolete.*	Authority: G.S. 130A-309.09D

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.07	ENVIRONMENTAL: LANDFILL PERMITS Permits and related records of landfills owned or operated by agency. Includes amendments and hazardous waste management permits.	a) Retain construction and operation permit for life of system and then destroy. b) Destroy in office all other permits and related records after the 5-year reporting period is complete.	Retention: G.S. 130A-294 (b1) (4)
18.08	ENVIRONMENTAL: NOTICE OF VIOLATIONS FOR IMPROPER DISCHARGE OR DISPOSAL FILE Notices issued by agency concerning improper non-stormwater discharge or disposal. Includes improper disposal of waste or products, chlorinated pool discharge, vehicle maintenance facility runoff, food service waste, and other unregulated commercial and industrial discharges.	Destroy in office one year after resolution.	
18.09	ENVIRONMENTAL: OUTSIDE WASTE CLEARANCE RECORDS Records allowing parties outside the operator's jurisdiction to dispose of waste at landfill.	Destroy in office 3 years after expiration of agreement.	
18.10	ENVIRONMENTAL: REPORTS SUBMITTED TO U.S. ENVIRONMENTAL PROTECTION AGENCY (EPA)	Destroy in office after 2 years.*	
18.11	EROSION CONTROL: EROSION AND SEDIMENT AFFIDAVITS Forestry and agricultural affidavits clarifying land use exempt from land-disturbing activity standards.	Destroy in office after 6 years.	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.12	EROSION CONTROL: EROSION AND SEDIMENT CONTROL EXHIBIT RECORDS	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>retain digital records</u>	
18.13	EROSION CONTROL: EROSION AND SEDIMENT CONTROL INSPECTIONS Inspections conducted by agency. Includes inspection requests, notices of violations, denial reports, sketches, plans, correspondence (including e-mail), and similar records concerning the construction, modification or demolition of existing and new roads and construction sites.	Destroy in office 6 years after final site inspection.*	
18.14	EROSION CONTROL: EROSION AND SEDIMENT CONTROL PERMITS Records concerning permits, including permit logs, issued for site construction.	a) Destroy in office records concerning approved permits 3 years after expiration of permit. b) Destroy in office non-approved permits after 3 years.	
18.15	EROSION CONTROL: EROSION AND SEDIMENT CONTROL PLANS Includes approved and disapproved plans submitted to agency. Includes revisions, addendums, and records delineating who is financially responsible for the project.	a) Destroy approved plans in office 3 years after expiration. b) Destroy non-approved plans after 3 years.	Authority: 15A NCAC 04B .0118

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.16	EROSION CONTROL: TROUT BUFFER VARIANCES Includes denials and waivers. SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Variances (STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS).	a) Destroy in office 6 years after approval of permit. b) Destroy in office after 3 years plans for which a permit was not issued.	Authority: 15A NCAC 04B .0125
18.17	FLOOD CONTROL: FLOOD CERTIFICATIONS Records concerning lot reviews for construction projects submitted to agency. SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Permits: Zoning Compliance (STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS).	Destroy in office when superseded or obsolete.	
18.18	FLOOD CONTROL: FLOOD STUDIES Reviews of stream crossings for construction projects submitted to agency.	Retain in office for life of structure and then destroy.*	
18.19	UTILITIES: DAILY WATER AND WASTEWATER FACILITY OPERATORS LOGS Records concerning water distribution and treatment.	a) Destroy in office records concerning the operation of wastewater treatment facilities after 5 years.* b) Destroy in office records concerning the operation of water treatment facilities after 3 years.*	Authority: 15A NCAC 18C .1301

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.20 	UTILITIES: ELECTRIC POWER AND NATURAL GAS FACILITY ENGINEERING AND SYSTEM PLANS Includes authorizations to construct, building plans, and specifications of privately owned utilities. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) If an element of the Strategic Plan, destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>3 years</u> b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.	Confidentiality: G.S. 132-1.7
18.21	UTILITIES: ELECTRIC POWER AND NATURAL GAS PERMITS AND APPROVAL RECORDS Permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute and issued by agency.	a) Destroy in office permits 5 years after expiration, cancellation, revocation or denial.* b) Retain approval letters and supporting documentation permanently.	
18.22	UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM MAINTENANCE AND REPAIR RECORDS Records documenting installation, location, specifications, and maintenance history of meters, lines, pipes, pumps, and similar system equipment.	Destroy in office 3 years after equipment is no longer owned and/or operational.	
18.23 	UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM MANAGEMENT PLANS SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Retain in office for life of system and then destroy.	Confidentiality: G.S. 132-1.7

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.24	UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM PROJECT RECORDS	a) Retain project pre-approval and final approval letters for life of system and then destroy. b) Destroy in office remaining records 5 years after project is completed.	
18.25	UTILITIES: LANDLORD AGREEMENTS Agreements to automatically transfer utility accounts to landlords when their tenant vacates a property.	Destroy in office 3 years after expiration of agreement.	
18.26	 UTILITIES: MAPS (UTILITY INSTALLATIONS & DISTRIBUTIONS) Includes maps, plats, charts, and similar records showing the location of water mains, valves, hydrants, meters, etc., throughout the system. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps, All Other (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS).	Retain for life of system and then destroy.	Authority: 15A NCAC 18C .0300 Confidentiality: G.S. 132-1.7

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.27	UTILITIES: METER INSTALLATION, TESTING AND CALIBRATION RECORDS (ELECTRIC, WATER, GAS) Includes records concerning the installation or planned installation of meters and connecting any facility to utility system owned or operated by the agency.	a) Destroy in office records verifying installation of meter 3 years after equipment is no longer owned and/or operational. b) Destroy in office notice to property owners of approval of utility installation after 2 years. c) Destroy in office remaining records after reference value ends. [±] Agency Policy: Destroy in office after <u>3 years</u>	
18.28	UTILITIES: PUBLIC UTILITIES INSPECTION FORMS Records relating to the inspection of sanitation, electric, water, gas and sewer utilities submitted to or conducted by agency.	Destroy in office when superseded or obsolete.	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.29 	UTILITIES: PUBLIC UTILITIES SYSTEM ENGINEERING, MAINTENANCE, AND REPAIR RECORDS Includes records documenting installation, authorizations to construct, building plans, location, specifications, and maintenance history, for hydrants, pipes, pumps, valves, and similar system equipment. Includes drainage system maintenance and repair records.	a) Retain in office as built plans and specifications for life of system and then destroy. b) Destroy in office 5 years after equipment is no longer owned and/or operational if unlike replacement occurred. c) Destroy in office 3 years after equipment is no longer owned and/or operational if like replacement occurred. d) Destroy in office background surveys, studies, reports, drafts, and other records when superseded or obsolete.	Authority: 15A NCAC 18C .0300 15A NCAC 2H .0115 Confidentiality: G.S. 132-1.7
18.30	UTILITIES: RECYCLING WATER RECORDS Backwash recycling groundwater records.	Destroy in office when superseded or obsolete.	Authority: 40 CFR 141.76(d)
18.31	UTILITIES: SERVICE INTERRUPTION RECORDS Includes reports, logs, or similar records documenting service interruptions.	Destroy in office after 3 years.*	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.32	UTILITIES: TAP AND HOOK UP RECORDS Applications, permits, contracts, logs, or similar records documenting location and installation of water and wastewater hookup and taps.	a) Destroy in office permits and contracts 3 years after termination or cancellation.* b) Destroy in office denied applications and remaining records when reference value ends. ± Agency Policy: Destroy in office after <u>retain digital records</u>	Confidentiality: G.S. 132-1.1(c)
18.33	UTILITIES: WATER AND WASTEWATER PERMITS AND APPROVAL RECORDS Permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute for systems owned or operated by agency. Includes records regarding National Pollutant Discharge Elimination System (NPDES) permits.	a) Retain approval letters and supporting documentation permanently. b) Destroy in office permits and other records 5 years after expiration, cancellation, revocation or denial.*	Retention: 15A NCAC 18C .0300 15A NCAC 2H .0115 40 CFR 122.28
18.34	UTILITIES: WASTEWATER MAINTENANCE OPERATION REPORTS	Destroy in office after 3 years.	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.35	WATER QUALITY: LABORATORY OPERATIONS RECORDS Includes documentation of all analytical quality control practices, reporting units, forms, test methods, and related procedures pertaining to certification obtained by agency. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy in office samples, raw data, analysis reports and related documentation after 5 years.* b) Destroy in office records concerning certification 2 years after expiration, cancellation, revocation, or denial.*	Authority: 15A NCAC 02H .0805(7)(G) 15A NCAC 02H .1100
18.36	WATER QUALITY: PRETREATMENT PROGRAM RECORDS Includes annual pretreatment reports, records of monitoring activities and results, water quality records and other related documentation.	a) Destroy in office permits and supporting documentation 5 years after expiration, cancellation, revocation, or denial.* b) Destroy in office remaining records after 3 years.*	Retention: 15A NCAC 02H .0908(f)(1) 40 CFR 503.17
18.37	WATER QUALITY: PUBLIC WATER SANITARY SURVEY RECORDS Includes reports, summaries, studies, correspondence (including e-mail), and other related records documenting the sanitary condition of system. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy in office 10 years after completion of survey.* b) Destroy in office documentation of corrective measures 2 years after their implementation.	Retention: 40 CFR 141.33 15A NCAC 18C .1526

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.38	WATER QUALITY: SEWER JETTING AND VECTORING RECORDS Records documenting the routine cleaning of wastewater lines.	Destroy in office after 3 years.	
18.39	WATER QUALITY: SLUDGE TREATMENT RECORDS Includes analyses, certification statements, site restrictions, monitoring records, vector attraction reduction requirements, trip tickets, residual records, control plans and other related documentation conducted by or for agency.	Destroy in office after 5 years.*	Retention: 40 CFR 503.17
18.40	WATER QUALITY: STORMWATER DEVIATION PERMITS Permits issued to single lots. Includes applications, certifications of installations, and related records.	a) Destroy in office permits and contracts 3 years after termination or cancellation.* b) Destroy in office inspections submitted by owner when superseded or obsolete.	
18.41	WATER QUALITY: VIOLATION RECORDS Includes all documentation of actions taken to correct federal, state or local violations of water and wastewater management standards by agency.	Destroy in office after 5 years.*	Retention: 40 CFR 141.33 15A NCAC 18C .1526
18.42	WATER QUALITY: WATER AND WASTEWATER SYSTEM INSPECTIONS AND TESTS Includes non-compliance inspections and test records conducted by a facility.	Destroy in office after 5 years.	

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STANDARD 19: PROGRAM OPERATIONAL RECORDS – STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS

Official records and materials created and accumulated for constructing and maintaining municipal and county-maintained streets and other public works projects, and engineering records.

ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.01	APPRAISAL REPORTS Records appraising privately owned land for compensation in eminent domain projects. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).	Destroy in office after 10 years.	
19.02	CEMETERY DEEDS Copies of deeds for the purchase of agency-owned cemetery plots. Includes applications or deed slips.	a) Retain 1 copy of deed in office permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>retain digital records</u>	
19.03	CEMETERY INTERMENT RECORDS Includes name of deceased, date of interment, and location of plot.	Retain in office permanently. <i>Retention Note: If these records are maintained as an electronic database, a copy should be maintained on paper or microfilm and updated regularly.</i>	

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.04	EXCAVATION PERMITS Applications, permits, and billing information for individuals and contractors requesting to work in the county or municipal right-of-way for demolitions or excavations.	a) Destroy in office billing records after 3 years.* b) Destroy in office applications and permits 1 year after expiration. c) Destroy in office applications for which a permit was never issued when reference value ends.± Agency Policy: Destroy in office after <u>retain digital records</u>	
19.05	GRAVE OPENING ORDERS Authorizations to dig graves in agency-owned cemeteries.	Destroy in office after 1 year.	
19.06	INFRASTRUCTURE MAINTENANCE RECORDS Records documenting the general maintenance and upkeep of infrastructure, including roads, traffic lights, and other public works.	Destroy in office after 3 years.	
19.07	PLANNING FILE Includes long-range and immediate plans for paving streets and other projects.	Destroy in office 5 years after superseded or obsolete.	
19.08	 PROJECT RECORDS - CANCELLED Background information for public works and engineering projects explored but not undertaken. Records are used as a reference file and include maps, project information, and the reason that the project failed.	a) Retain records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>2 years</u>	Confidentiality: G.S. 132-1.7

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.09 	PROJECT RECORDS – CORE Records used to document the design and construction of public works and engineering projects. Includes final as-built plans and specifications; certificate of completion/closure; policy correspondence (including e-mail), covenants; final estimates and budgetary summaries; geo-technical reports; environmental mitigation agreements; permits for right-of-way use, photographs documenting key aspects of construction as-built; final specifications; and as-built structural calculations.	Destroy originals after life of structure ends.	Confidentiality: G.S. 132-1.7

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.10	 PROJECT RECORDS – ENGINEERING & COMPLIANCE Records used to document the engineering and technical areas of a public works and engineering project, as well as compliance with regulatory requirements. Includes superseded plans and specifications, agreements for construction and finance, billing information, change orders, force orders, work orders, construction claims, contract documentation, contracts, reports, diaries and narratives, EEO information, material certifications, material testing reports, notice to proceed, permit of entry, postings, pre-construction conference records, final progress payments, punch lists, regulations, shop drawings, and subcontractor information. File also includes environmental review records and proof of compliance with any mitigation measures required as a condition of project authorization. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Grants (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS); GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Grants: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS); GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Payroll and Earnings Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS.)	Destroy in office 6 years after completion or termination of project.*	Confidentiality: G.S. 132-1.7

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.11	PROJECT SHEETS FILE Local forms listing property owners, lot or tract size, right-of-way data, tax value, and compensation.	Destroy in office after 5 years.	
19.12	RIGHT-OF-WAY ACQUISITION WORKING RECORDS Includes records of negotiations on acquisition of rights-of-way related to public works and engineering projects, such as 10-day letter of notification, notification of intent to acquire, notice of condemnation action, and other correspondence (including e-mail) relating to right-of-way acquisitions. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).	Destroy in office after 3 years.*	
19.13	STREET NAME AND HOUSE NUMBER FILES Records relating to the assignment of street names and house numbers. May also include records documenting street name changes, and non-temporary street openings and closings.	Retain in office permanently.	

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.14 	STRUCTURAL MAINTENANCE AND ANALYSIS RECORDS Records used for maintenance, review, and analysis of permanent and temporary structures owned by third parties that extend, cross or abut the public right-of-way. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Blueprints and Specifications (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Destroy records pertaining to structure 3 years after the end of life of the structure.	Confidentiality: G.S. 132-1.7
19.15	SURVEY FIELD RECORDS Records used to document and establish easements and rights-of-way, and to locate reference points used during street and utility projects. Records include traverse information, tie sheets, sketches, field notes, plats, interpretation of field notes, alignments, profiles of projects, plans, grade sheets, estimates, databank ties, and other miscellaneous documents used to establish grades, rights-of-way and easements. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).	a) Retain records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
19.16	TRAFFIC ANALYSIS Analysis of vehicle traffic within agency jurisdiction.	Destroy in office after 5 years.	

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.17	TRAFFIC VIDEO RECORDINGS AND DATA Recordings and other data used to monitor traffic levels.	Destroy in office after 30 days.*	

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STANDARD 20: PROGRAM OPERATIONAL RECORDS - LAW ENFORCEMENT RECORDS (EXCLUDING SHERIFF'S OFFICES)

Records received and created by any local government law enforcement agency (excluding sheriff's offices) necessary to meet all statutory requirements. Comply with applicable provisions of G.S. §132-1.4 regarding confidentiality of law enforcement records and G.S. §153A-98 and G.S. §160A-168 regarding confidentiality of personal information of law enforcement officers.

Please note: Records created by county sheriff's offices fall under the purview of the Records Retention Schedule of County Sheriff's Offices.

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.01	ALARM CALL REPORTS Reports completed by officers responding to alarm calls. Includes listings of alarm type, time received, time arrived, reason for activation, and other related information. Includes forms completed by businesses and residences naming emergency contacts, location of safe, or other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 30 days if not made part of a case file.	
20.02	ALTERNATIVE SENTENCING PROGRAMS Records documenting alternative sentencing programs. Includes work release and weekender service.	Destroy in office 3 years after individual leaves program.	
20.03	 ARREST PROCESSING RECORDS Records used to track a defendant's time and activities while in arrest processing. Includes time of arrival and time to and from each workstation.	Destroy in office 1 year after date of arrest.*	Confidentiality: G.S. 132-1.4

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.04 	ARREST REPORTS Reports concerning arrests made by officers.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 5 years from date of arrest if report is not made part of a case file.	Confidentiality: G.S. 132-1.4
20.05	AUCTION RECORDS Records concerning abandoned and unclaimed articles or found property in possession of law enforcement sold at public auction. May include auction receipts of monies received for items sold.	Destroy in office after 3 years.*	
20.06 	CASE FILE: FELONIES Includes investigative reports, complaint reports, fingerprint cards, original arrest reports, copies of warrants, special expenditure report, statements of seized and returned property, interview sheets; case status reports, photographs, court orders, correspondence; officer's notes, court dispositions, audio or video recordings, and other related records. SEE ALSO: Electronic Recordings of Interrogations, below.	a) Destroy in office records concerning solved cases 20 years after disposition of case and exhaustion of any appeals.* b) Retain in office records concerning unsolved cases until solved, and then follow disposition instructions in part (a).	Confidentiality: G.S. 132-1.4

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.07 	CASE FILE: MISDEMEANORS Includes investigative reports, complaint reports, fingerprint cards, original arrest reports, copies of warrants, special expenditure reports, statements of seized and returned property, interview sheets, case status reports, photographs, court orders, correspondence, officer's notes, court dispositions, audio or video recordings, and other related records.	a) Destroy in office records concerning solved malicious misdemeanor cases 3 years after disposition of case and exhaustion of any appeals.* b) Retain in office records concerning unsolved malicious misdemeanor cases until solved, and then follow disposition instructions in part (a). c) Destroy in office records concerning all misdemeanor cases not covered in (a) or (b) after 3 years.*	Confidentiality: G.S. 132-1.4
20.08 	COMMUNICATION RECORDS Recordings, printouts, and logs of telephone, radio, dispatch, 911 emergency calls or texts, and computer aided dispatch (CAD) systems incoming and/or outgoing communications. Includes time and date of call, contents of call, location of call, name of unit sent to scene, and other related information. SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, 911 Communication Records and Recordings AND Dispatch Records and Recordings.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 30 days if not made part of a case file.	Confidentiality: G.S. 132-1.4

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.09 	COMPLAINTS Records concerning complaints to which a unit responded. Includes logs listing name and address of victim, time, date, nature of complaint, responding officer's name, action taken, and other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 3 years after resolution if not made part of a case file.	Confidentiality: G.S. 132-1.1(a)
20.10	COMPOSITE INTERVIEWS Summaries of interviews used to determine the physical description of suspects.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>retain digital records</u>	
20.11 	CRIME ANALYSIS RECORDS Records used to anticipate, prevent, or monitor possible criminal activity. Includes crime reports, photographs, complaints, copies of citations, criminal profile information, and interoffice memoranda generated or accumulated in connection with investigations or directed patrols.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>retain digital records</u>	Confidentiality: G.S. 132-1.4 G.S. 132-1.7(a2) Authority/ Confidentiality/ Retention 28 CFR 23.20

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.12 	DETENTION FACILITY INCIDENT REPORTS Detention facility incident reports. Include narratives of incidents, lists of those involved, statements and interview reports, inmates' refusal of medical treatment, inmates' refusal to press charges, and other related records. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Litigation Case Records (STANDARD 6: LEGAL RECORDS).	c) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors d) Destroy in office after 3 years if not made part of a case file.*	Confidentiality: G.S. 132-1.1(a)
20.13	DETENTION FACILITY OPERATIONAL RECORDS Records concerning all activities occurring during shifts at detention facilities. Includes end of duty (shift change reports, key and radio control lists, equipment and inmate/non-inmate housing check lists, cell inspection reports, laundry exchange and controlled property lists, tour reports, etc.) and inmate accountability (rosters, commitment and release reports, cell locations, etc.) records.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>retain digital records</u>	
20.14	DETENTION FACILITY PHYSICAL FORCE RECORDS Reports made by any officer or employee of a detention facility who applies physical force to an inmate or arrestee.	Destroy in office after 3 years.*	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.15	DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) ENTRIES Records and logs listing entries and inquiries made against DCI-NCIC networks and concerning missing persons, wanted persons, stolen vehicles or other property, and other related topics.	Destroy in office 1 year after period covered by audit.*	Authority: 28 USC 534
20.16	DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) VALIDATION RECORDS Requests and proofs of verification for DCI-NCIC or other law enforcement information networks.	Destroy in office after 1 year.*	Authority: 28 USC 534
20.17	DNA SAMPLING RECORDS Records documenting the collection of DNA samples from persons for qualifying offenses. Includes copies of judgments. Original samples are forwarded to the State Crime Lab.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 1 year from date sample was obtained if not made part of a case file.	Authority: G.S. 15A-266.8

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.18 	DOMESTIC VIOLENCE RECORDS Restraining orders and related records.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after expiration of restraining order if not made part of a case file.	Confidentiality: G.S. 132-1.4
20.19	DRUG AND ALCOHOL TESTING RECORDS Records and reports generated when individuals suspected of being under the influence of or impaired by illegal drugs or alcohol are chemically tested. Includes reports used for persons arrested for driving while impaired by alcohol and/or drugs and breathalyzer analysis reports. SEE ALSO: Laboratory Case Records, below.	a) Transfer original Driving While Impaired (DWI) reports to county Clerk of Superior Court's office. b) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors c) Destroy in office when reference value ends if not made part of case file. [±] Agency Policy: Destroy in office after <u>retain digital records</u>	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.20 	ELECTRONIC RECORDINGS OF INTERROGATIONS Electronic recordings generated by audio and/or video recording devices of custodial interrogations in an investigation of a juvenile or any person in a criminal investigation.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>retain digital records</u>	Authority: G.S. 15A-211 Confidentiality: G.S. 7B-3001(b) G.S. 132-1.4A
20.21 	FIELD OBSERVATIONS Records concerning field observations of suspicious persons or vehicles. Includes subject's name, address, and physical description; date, time, and location of occurrence; reason for stop; name of officer conducting interview; and other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>retain digital records</u>	Confidentiality: G.S. 132-1.4

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.22 	FINGERPRINT CARDS Records used to verify a subject's identity. Includes fingerprints and all necessary information required to identify an individual. Also includes records of latent finger and palm prints that were found at the scene of a crime without identification of suspects <i>Original fingerprint records are forwarded to the State Bureau of Investigation.</i> SEE ALSO: Juvenile Case History Identification Records, below.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 3 years if not made part of case file.	Confidentiality: G.S. 132-1.4 Authority: G.S. 15A-502
20.23	FORCIBLE ENTRY RECORDS Records concerning forcible entries made by law enforcement personnel.	Destroy in office after 1 year.	
20.24	FUGITIVE WARRANTS CASE RECORDS Records concerning fugitive warrants sent to a department from another jurisdiction requesting assistance in finding an individual. Includes fugitive profile and warrant.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____ retain digital records	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.25 	IDENTIFICATION PHOTOGRAPHS Photographs (mugshots) of persons arrested in association with formal investigations. Also includes driver's license photos or negatives. SEE ALSO: Juvenile Case History Identification Records, below.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 3 years if not made part of a case file.	Confidentiality: G.S. 132-1.4
20.26	INCIDENT RESPONSE REPORTS Reports completed by officers responding to incidents. Includes victim, suspect, and witness information; damaged and stolen property reports; statement sheets; Miranda waiver forms; and other related records.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>retain digital records</u>	Confidentiality: G.S. 132-1.4
20.27	INMATE CLASSIFICATION RECORDS Records concerning classification information gathered by the detention facility while inmates are incarcerated. Also includes incident reports, behavioral or disciplinary reports, interviews, classification level assigned, requested housing moves, and other related records.	Destroy in office 3 years after inmate is released or transferred from the facility.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.28	INMATE COMMITMENT RECORDS Copies of judgment and commitment papers received from the Clerk of Superior Court's office used to validate time spent incarcerated.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>retain digital records</u>	
20.29	INMATE DEATH REPORTS Reports filed by office upon the death of an inmate. A report must be sent to the county health director and N.C. Department of Health and Human Services, within five days of the death.	Destroy in office after 3 years.*	Authority: G.S. 153A-224(b)
20.30	INMATE FINANCIAL RECORDS Records concerning individual inmate funds maintained by a detention facility for use by the inmate while incarcerated. Includes balance sheets listing inmate's name and number, amount of funds, dates of deposits and withdrawals, and other related information.	Destroy in office 3 years after inmate is released or transferred from the facility.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.31 	INMATE GRIEVANCE RECORDS Records concerning grievances filed by inmates and actions taken.	a) If legal action is taken and case adjudicated, destroy in office 5 years after final disposition. b) If legal action is taken and case non-adjudicated (out-of-court claims), destroy in office 5 years after final disposition or expiration of relevant statute of limitations. c) Destroy remaining records in office 3 years after inmate is released or transferred from the facility.*	Confidentiality: G.S. 132-1.1(a)
20.32	INMATE MAIL, TELEPHONE, OR VISITOR RECORDS Records concerning telephone calls and mail sent and received by inmates and individuals visiting inmates confined in county or municipal detention facilities. Includes logs listing inmate's name, date and time of call or mail, visitor's signature and address, and other related information.	Destroy in office after 1 year.*	
20.33	INMATE MEAL RECORDS Records concerning the planning and scheduling of inmate meals. Includes food service daily shift reports, daily meal sheets, food order forms, kitchen checklists, lists of inmates receiving meals and other related records. File also includes records concerning requests for special diets made by inmates.	Destroy in office after 3 years.*	Retention: 10A NCAC 14J .1723

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.34	 INMATE MEDICAL RECORDS Records concerning medical examinations, diagnoses, and treatments of inmates. Includes medical information sheets and screening forms, medical histories as provided by inmate, receipt and/or release forms for medications and medical articles, laboratory and x-ray reports, blood pressure records, sick bay transfer forms, special diet authorizations, psychological evaluation forms, suicide watch sheets, progress notes, health assessment forms, dental forms, doctors' orders, transportation records to outside clinics or hospitals, and other related records. May also include authorization records for release of medical information to detention facility staff, informed consent forms, refusal of treatment forms, and release of financial responsibility forms. SEE ALSO: Juvenile Detention Records, below.	Destroy in office 10 years after inmate's release or parole.	Confidentiality: G.S. 8-53 45 CFR 164.502
20.35	INMATE PERSONAL IDENTIFICATION RECORDS Records concerning changes to be made to an inmate's incarceration file. Includes personal identification changes, superior court calendar, long form dismissals and other related records.	Destroy in office 30 days after receipt.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.36	INMATE RESEARCH REQUESTS Requests filed by inmates seeking use of a facility's law library or similar collection containing research materials.	Destroy in office 1 year from date of request.	
20.37 	JUVENILE CASE FILES Includes incident and arrest reports, detention orders, disposition instructions, name and address of person having legal and/or physical custody of child, correspondence with county, municipal, or state juvenile services, and other related records.	a) Destroy in office records when juvenile reaches 21 years of age if adjudicated for an offense that would have been a Class A, B1, B2, C, D, or E felony if committed by an adult. b) Destroy in office records related to all other cases when juvenile reaches 18 years of age.	Confidentiality: G.S. 7B-3001(b) Retention:
20.38 	JUVENILE CASE HISTORY IDENTIFICATION RECORDS Includes fingerprints and photographs.	a) Transfer to the State Bureau of Investigation and Federal Bureau of Investigation. b) Destroy in office agency copies when reference value ends.*± Agency Policy: Destroy in office after <u>2</u>	Confidentiality/ Retention: G.S. 7B-2102
20.39 	JUVENILE DETENTION RECORDS Records concerning medical and non-medical information gathered on juvenile inmates held in county or municipal detention facilities.	a) Destroy in office medical records when juvenile reaches 30 years of age. b) Destroy in office non-medical records when juvenile reaches 18 years of age.	Confidentiality: G.S. 7B-3001(b)

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.40 	LABORATORY CASE RECORDS Records concerning cases examined in a crime laboratory; includes reports, notes, charts, and other related records	Retain in office permanently.	Confidentiality: G.S. 132-1.4
20.41 	LAW ENFORCEMENT AUDIO AND VIDEO RECORDINGS Tapes and digital recordings generated by mobile and fixed audio and video recording devices. Does not include Electronic Recordings of Interrogations, above.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 30 days if not made part of a case file.	Confidentiality: G.S. 132-1.4A G.S. 153A-98
20.42	MULTIPLE FIREARMS SALES REPORTS Reports received from dealers reporting the sale of multiple firearms.	Destroy in office when reference value ends, but within 20 days after receipt.± Agency Policy: Destroy in office after _____ retain digital records	Retention: 18 USC 923(g)(3)(b)
20.43	MULTIPLE FIREARMS SALES REPORTS DESTRUCTION RECORDS Records submitted after 6 months to the U.S. Attorney General's Office certifying that all multiple firearm sales reports received from dealers have been destroyed.	Destroy in office after 1 year.	Authority: 18 USC 923(g)(3)(b)

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.44	ORDINANCE VIOLATIONS CITATIONS Citations issued for violations of municipal and county ordinances.	Destroy in office after 3 years.*	
20.45	PAWNSHOP RECORDS Pawnshop cards and property records submitted to municipal and county law enforcement offices.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 1 year if not made part of a case file.	Authority: G.S. 66-391
20.46	PERMISSION TO SEARCH RECORDS Authorizations for officers to search property, and if necessary, confiscate property deemed pertinent to an investigation.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of a case file.± Agency Policy: Destroy in office after <u>retain digital records</u>	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.47 	PERMITS: CONCEALED WEAPONS AND HANDGUNS Applications and supporting documentation filed to carry concealed weapons or purchase handguns. Includes background checks and other related records.	a) Destroy in office all approved applications after 5 years. b) Destroy in office denied applications and related records 5 years from date of denial or resolution of petition filed with district court, whichever is longer. c) Destroy in office background checks and related records concerning approved applications when permit is issued.	Authority/ Confidentiality: G.S. 14-415.17 G.S. 132-1.4 G.S. 132-1.7
20.48	PRISON RAPE ELIMINATION ACT (PREA) FILE Allegation, investigation, and incident review records documenting investigations into allegations of sexual abuse or sexual harassment.	Destroy in office 6 years after inmate's release.* <i>Retention Note: If a minor is involved in the incident, records should be retained until the minor reaches age 30.</i>	Authority: 28 CFR Part 115
20.49	PRISON RAPE ELIMINATION ACT (PREA) DATA FILE Aggregated data for every allegation of sexual abuse at county or municipal lockups.	Destroy in office after 10 years.	Authority/Retention: 28 CFR Part 115.187 28 CFR 115.189(d)
20.50	PRISONER TRANSPORT RECORD Verification forms completed by receiving party of prisoner patient.	Destroy in office after 1 year.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.51	PROPERTY RECORDS Records concerning confiscated property, evidence, stolen or recovered property, and unclaimed property. Includes descriptions of property and its value, serial numbers, and other related records. Records may also be filed with original incident report.	Destroy in office 3 years after final disposition of property.	
20.52	PURSUIT LOGS Logs concerning pursuits by law enforcement personnel.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 3 years if not made part of a case file.	
20.53	RIDE-ALONG PROGRAM RECORDS Records concerning a law enforcement ride-along program.	Destroy in office after 3 years.*	
20.54	SEXUAL OFFENDER RECORDS Records concerning sexual offenders living within jurisdiction.	a) Destroy in office records of persons registered in the "Sexually Violent Predator Program" when individual is known dead or after 90 years. b) Destroy in office records of persons registered in the "Sex Offender and Public Protection Program" after court petition and review by the state; or after 30 years or length of court order, whichever is greater; or when individual is known dead.	Authority: G.S. 14-208 Retention: G.S. 14-208.6A

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.55	TRAFFIC ACCIDENT REPORTS Records concerning traffic accidents. Includes general correspondence, property receipts, collision reports, waivers signed by involved parties agreeing to settle damages among themselves, and other related records.	a) Transfer original collision report to the N.C. Division of Motor Vehicles within 10 days of accident. b) Destroy in office after 3 years records concerning accidents not meeting N.C. Division of Motor Vehicles reporting requirements, but for which a report was made. c) Destroy in office duplicate reports when reference value ends.± Agency Policy: Destroy in office after <u>3 yr</u>	Confidentiality: 18 USC 2721
20.56 	TRAFFIC CITATIONS AND WARNINGS Citations issued to drivers violating motor vehicle and traffic laws. Includes voided citations and warnings that do not require a fine or court appearance.	a) Transfer original citations to county Clerk of Superior Court's office. b) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors c) Destroy remaining records in office after 1 year.	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.57	TRESPASS RECORDS Authorizations by property owners, lessees, or managers for law enforcement officers to take action deemed appropriate to remove unauthorized persons and issue trespass warnings.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 1 year after expiration if not made part of a case file.	Authority: G.S. 14-159.12-13
20.58	VEHICLE TOWING RECORDS Includes recovery authorizations and consent forms completed by owners to have vehicle towed, removed, stored, or left at the scene.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 1 year if not made part of a case file.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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STANDARD 21: PROGRAM OPERATIONAL RECORDS - TAX RECORDS (FOR MUNICIPALITIES)

Records received and created by a municipality for the purposes of collecting taxes. For County Tax Administration records, please refer to the separate County Tax Administration Program Schedule.

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.01 	ANIMAL LICENSING RECORDS Records concerning the licensing of dogs, cats, and other animals by the municipality. Includes owner and animal information and record of fees paid.	Destroy in office after 3 years.*	Authority: G.S. 160A-212 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1
21.02	BEER AND WINE TAXES AND RECORDS Records concerning the levy of privilege taxes on beer and wine.	Destroy in office after 3 years.*	Authority: G.S. 105-133.77-79
21.03 	BICYCLE LICENSE PLATE RECORDS Records concerning issuance of license plates for bicycles.	Destroy in office after 1 year.*	Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.04	DELINQUENT TAXPAYER RECORDS Records concerning taxpayers who have not paid real and personal property taxes due, including unpaid notices. SEE ALSO: Delinquent Taxpayer Records: Advertisement of Tax Liens Against Real Property, below.	Destroy in office after 10 years or 3 years after final settlement or 1 year after released by governing board, whichever comes first.*	
21.05	DELINQUENT TAXPAYER RECORDS: ADVERTISEMENT OF TAX LIENS AGAINST REAL PROPERTY Records concerning the municipal taxation officer's publication in the newspaper of delinquent taxpayer and tax sales notices. SEE ALSO: Delinquent Taxpayer Records, above.	Destroy in office after 10 years.*	Authority: G.S. 105-369
21.06	MOTOR VEHICLE RENTAL TAX RECORDS Records concerning motor vehicle rental tax assessments.	Destroy in office after 3 years.*	
21.07	MUNICIPAL VEHICLE TAX RECORDS Records concerning municipal vehicle taxes levied annually.	Destroy in office after 3 years.*	Authority: G.S. 20-97(b)
21.08	PREPARED FOOD AND BEVERAGE TAX RECORDS Records concerning prepared food and beverage tax assessments.	Destroy in office after 3 years.*	

21. Tax Records (Municipal)

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.09	PRIVILEGE LICENSES, TAXES, AND FEE RECORDS Records concerning the licensing of occupations, businesses, trades, professions, and forms of amusement or entertainment and associated fees and taxes. SEE ALSO: Animal Licensing Records (above), Beer and Wine Taxes and Records (above), Municipal Vehicle Tax Records (above), Taxicab and Limousine Tax Records (below).	Destroy in office after 3 years.*	Authority: G.S. 160A-194
21.10 	ROOM OCCUPANCY TAX RECORDS Records concerning the administration of room occupancy tax records for those municipalities who have adopted room occupancy taxes.	Destroy in office after 3 years.*	Authority: G.S. 160A-215 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.11	 SCHEDULE "B" LICENSES Receipts of licenses issued by municipality in accordance with Article 2, Schedule B of the Revenue Laws of North Carolina. Applies to privilege licenses issued to attorneys-at-law and other professionals, installment paper dealers, and pawnbrokers.	a) Destroy in office 3 years after close of license tax year stubs or detailed settlement records. b) Destroy in office stubs 1 years after audit if settlement records are kept.	Authority: G.S. 105-41 G.S. 105-83 G.S. 105-88 G.S. 153A-152 G.S. 160A-211 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1
21.12	TAX ABSTRACTS AND LISTS Records concerning real and personal property in the municipality, based on assessment lists. Includes name and address of taxpayer along with descriptions of property owned and estimated value.	Destroy in office after 10 years or two revaluation cycles.	Authority: G.S. 105-309 G.S. 105-296
21.13	TAX EXEMPT PROPERTY FILE Records concerning property that is exempt from taxation.	Destroy in office 5 years after property exemption has expired or at end of life of structure, whichever comes first.	
21.14	TAX LEDGER CARDS OR SHEETS	Destroy in office 5 years after superseded or obsolete.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.15	TAX LEVY/SEIZURE RECORDS Inventory of property taken from property owner by the municipal tax collector to pay back taxes.	a) Destroy in office after 3 years execution forms if levy and sale of personal property is made. If levy and sale are conducted by municipal law enforcement agency, execution forms are to be retained by that agency. b) If levy, seizure, and sale are not made, destroy in office forms when reference value ends.± Agency Policy: Destroy in office after <u>3</u>	Authority: G.S. 105-366 G.S. 105-367
21.16	TAX LIEN SALES Records concerning sales held to satisfy tax liens.	Destroy in office 10 years after sale.	
21.17	TAX REBATES Records concerning tax rebates given or received.	Destroy in office after 10 years.	
21.18	TAX SCROLLS Records indicating property (real estate and personal) valuation and taxes due.	Destroy in office after 10 years.	
21.19	TAXICAB AND LIMOUSINE TAX RECORDS Records concerning the levy of privilege taxes on taxicabs and limousines.	Destroy in office after 3 years.*	Authority: G.S. 20-97(d)

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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MANAGING PUBLIC RECORDS IN NORTH CAROLINA

Q. What is this “records retention and disposition schedule”?

- A.** This document is a tool for the employees of local government agencies across North Carolina to use when managing the records in their offices. It lists records commonly found in agency offices and gives an assessment of their value by indicating how long those records should be retained. This schedule is also an agreement between your agency and the State Archives of North Carolina.

This schedule serves as the inventory and schedule that the State Archives of North Carolina is directed by N.C. Gen. Stat. § 121-5(c) and N.C. Gen. Stat. § 132-8 to provide. It supersedes all previous editions, including all amendments.

Q. How do I get this schedule approved?

- A.** This schedule must be approved by your governing body for use in your agency. That approval should be made in a regular meeting and recorded as an action in the minutes. It may be done as part of the consent agenda, by resolution, or other action.

Q. Am I required to have all the records listed on this schedule?

- A.** No, this is not a list of records you must have in your office.

Q. What is “reference value”?

- A.** Items containing “reference value” in the disposition instructions are generally records that hold limited value, which is typically restricted to those documenting routine operations within the office. A minimum retention period should be established by the office for any items containing the phrase “destroy in office when reference value ends” in the disposition instructions.

Q. Do the standards correspond to the organizational structure of my agency?

- A.** Records series are grouped into standards to make it easier for users to locate records and their disposition instructions. You may find that the groupings reflect the organizational structure of your agency, or you may find that records are located in various standards depending on the content of the record. The intent of the schedule’s organization is to provide an easy reference guide for the records created in your agency.

Q. What if I cannot find some of my records on this schedule?

- A.** Sometimes the records are listed in a different standard than how you organize them in your office. Be sure to check the Index and utilize the search function on the PDF version of the schedule to facilitate the location of records series. If you still cannot locate your records on the schedule, contact a Records Management Analyst. We will work with you to amend this records schedule so that you may destroy records appropriately. The Request for Change in Records Schedule form (see page A-17) can be used for such requests.

Q. What are public records?

- A.** The *General Statutes of North Carolina*, Chapter 132, provides this definition of public records:
- “Public record” or “public records” shall mean all documents, papers, letters, maps, books, photographs, films, sound recordings, magnetic or other tapes, electronic data-processing records, artifacts, or other documentary material, regardless of physical form or

characteristics, made or received pursuant to law or ordinance in connection with the transaction of public business by any agency of North Carolina government or its subdivisions. Agency of North Carolina government or its subdivisions shall mean and include every public office, public officer or official (state or local, elected or appointed), institution, board, commission, bureau, council, department, authority or other unit of government of the state or of any county, unit, special district or other political subdivision of government.

Q. *Is any person allowed to see my records?*

- A.** Yes, except as restricted by specific provisions in state or federal law. N.C. Gen. Stat. § 132-6 instructs:

“Every custodian of public records shall permit any record in the custodian’s custody to be inspected and examined at reasonable times and under reasonable supervision by any person, and shall, as promptly as possible, furnish copies thereof upon payment of any fees as may be prescribed by law. ... No person requesting to inspect and examine public records, or to obtain copies thereof, shall be required to disclose the purpose or motive for the request.”

Q. *What about my confidential records?*

- A.** Not all government records are open to public inspection. Exceptions to the access requirements in N.C. Gen. Stat. § 132-6 and the definition of public records in N.C. Gen. Stat. § 132-1 are found throughout the General Statutes. You must be able to cite a specific provision in the General Statutes or federal law when you restrict or deny access to a particular record.

Q. *Am I required to make available to the public copies of drafts that have not been approved?*

- A.** Yes, even if a report, permit, or other record has not been finalized, it is still a public record subject to request. Any record that is not confidential by law must be provided when a request is received, whether it is “finished” or not.

Q. *What do I do with permanent records?*

- A.** Permanent records should be maintained in the office that created the records, forever.

The Department of Natural and Cultural Resources (DNCR) is charged by the General Assembly with the administration of a records management program (N.C. Gen. Stat. § 121-4 (2) and § 132-8.1) and the maintenance of “*a program for the selection and preservation of public records considered **essential** to the operation of government and to the **protection of the rights and interests of persons**”* (§ 132-8.2). Permanent records with these characteristics require preservation duplicates that are human-readable (paper or microfilm). Some examples of these characteristics include:

- Affect multiple people, without regard to relation
- Have significance over a long span of time
- Document governance
- Document citizenship

Examples of records with these characteristics:

- Minutes of governing bodies at the state and local levels are the basic evidence of our system of governance, and are routinely provided for the public to read.

- Records, such as deeds and tax scrolls, about land document changes in ownership and condition. Counties maintain offices expressly for the purpose of making those records available to the public. Other records in local and state governments document potential public health hazards, such as hazardous materials spills.
- Adoptions, marriages, and divorces document changes in familial relationships and document citizenship. Though adoptions are confidential (not available for public inspection), they document citizenship and changes in inheritance and familial succession.
- Court records, such as wills, estates, and capital cases, affect people within and across family groups, are made available for public inspection, and often involve transactions related to the examples above.

See the Human-Readable Preservation Duplicates policy issued by the North Carolina Department of Natural and Cultural Resources (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/human-readable-preservation>) and check with a records analyst to determine whether your permanent records require a preservation duplicate.

Q. What is historical value?

- A.** Historical records document significant events, actions, decisions, conditions, relationships, and similar developments. These records have administrative, legal, fiscal, or evidential importance for the government or its citizens. Two criteria for determining historical value are inherent interest and extraordinary documentation:
- Inherent interest is created by non-routine events, by the involvement of famous parties, and by compelling contexts. For instance, foreclosure proceedings from the 1930s have high historical value because they date from the era of the Great Depression.
 - Extraordinary documentation is found in records that shed light on political, public, or social history. For instance, the records from the replevin case that returned the Bill of Rights to North Carolina hold more historical value than most property case files because of the political history intertwined with this case.

SANC has further elaborated selection criteria that help distinguish records with historical value:

- Do they protect the rights and property of citizens?
- Do they have a long-term impact on citizens?
- Do they document the core functions of an agency?
- Do they document high-level decision-making that shapes an agency's policies or initiatives?
- Do they summarize an agency's activities?

Call a Records Management Analyst for further assistance in assessing historical value.

Q. What if I do not have any records?

- A.** Nearly every position in government generates, receives, or uses records. Computer files of any kind, including drafts and e-mail, are public records. Even if your records are not the official or final version, your records are public records. Not all records have high historical, legal, or fiscal value, but they all must be destroyed in accordance with the provisions of the appropriate records schedule.

Q. I have a lot of unsorted records. What's a good first step for getting a handle on these records?

- A.** We encourage you to create a file plan of what records you have. When you create this plan, you can match each record to its placement on this schedule or on the appropriate retention schedule. A sample file plan is available on Page A-21. Having a file plan can help you strategize how to best organize your physical or digital records. A file plan is also useful in disaster planning and scheduling destructions.

Q. May I store our unused records in the basement, attic, shed, etc.?

- A.** Public records are public property. Though we encourage agencies to find places to store records that do not take up too much valuable office space, the selected space should be dry, secure, and free from pests and mold. Your office must ensure that records stored away from your main office area are well protected from natural and man-made problems while remaining readily available to your staff and the public.

Q. Our old records are stored in the attic, basement, or off-site building, etc. Are we required to provide public access to these records?

- A.** Yes, as long as the records are not confidential by law. You should also be aware that confidentiality can expire.

Q. Aren't all our old records at the State Archives of North Carolina?

- A.** Probably not. The State Archives of North Carolina collects only very specific types of records from local government offices. Contact a Records Management Analyst for more information about which records are held or can be transferred to the State Archives of North Carolina for permanent preservation.

Q. I found some really old records. What should I do with them?

- A.** Call a Records Management Analyst. We will help you examine the records and assess their historical value.

Q. Can I give my old records to the historical society or public library?

- A.** Before you offer any record to a historical society, public library, or any other entity, you must contact a Records Management Analyst. Permanent records must be kept either in your offices or at the State Archives of North Carolina.

Q. Whom can I call with questions?

- A.** If you are located west of Statesville, call our Western Office in Asheville at (828) 250-3103. If you are east of Statesville, all the way to the coast, call our Raleigh office at (919) 814-6900.

AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION

Q. Why is there an asterisk in the disposition instructions of so many items on this schedule?

A. No record involved in a pending or ongoing audit, legal, or other official action may be destroyed before that audit or action is resolved.

A legal hold or litigation hold means that records that are the subject of the legal hold or litigation hold must be preserved and thus must not be destroyed until officially released from the hold. A legal hold or litigation hold is placed when either an official discovery order is served on the agency requesting the production of the records in question (for a litigation, regulatory investigation, audit, open records request, etc.) or litigation is pending and the agency is thus on notice to preserve all potentially relevant records. You must also ensure that for a claim or litigation that appears to be reasonably foreseeable or anticipated but not yet initiated, any records (in paper or electronic formats) relevant to such a claim or litigation are preserved and not destroyed until released by your General Counsel. The records in question must not be destroyed until the completion of the action and the resolution of all issues that arise from it regardless of the retention period set forth in this schedule.

We have used an asterisk (*) in the disposition instructions to mark records series that are commonly audited, litigated, or may be subject to other official actions. However, any record has this potential. Records custodians are responsible for being aware of potential actions, and for preventing the destruction of any record that is, or may be reasonably expected to become, involved in an audit, legal, or other official action.

Records used during routine audits may be destroyed when the governing body accepts the audit, if the records have completed the retention period listed in this schedule. If time remains in the retention period, the records must be maintained for the remainder of the period. The auditor's working papers must be kept according to the schedule. (See also GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance, STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS, Audits: Financial, STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS.) Should a dispute arise over an audit, the records that were audited should be retained until that dispute is resolved.

The attorney representing the agency should inform records custodians when legal matters are concluded and records will no longer be needed. Following the conclusion of any legal action, the records may be destroyed if they have met the retention period in the schedule. Otherwise, they should be kept for the remaining time period.

TRANSITORY RECORDS

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”³

According to North Carolina General Statutes § 121 and § 132, every document, paper, letter, map, book, photograph, film, sound recording, magnetic or other tape, electronic data processing record, artifact, or other documentary material, regardless of physical form or characteristics, made or received in connection with the transaction of public business by any state, county, municipal agency, or other political subdivision of government is considered a public record and may not be disposed of, erased, or destroyed without specific approval from the Department of Natural and Cultural Resources.

The Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called “transitory records.” The following questions and answers discuss types of transitory records commonly created in state government. They may be disposed of according to the guidance below. However, all public employees should be familiar with the General Records Schedule for Local Government Agencies, their office’s Program Records Retention and Disposition Schedule, and any other applicable guidelines for their office. If any of these documents require a different retention period for these records, follow the longer of the two retention periods. When in doubt about whether a record is transitory, or whether it has special significance or importance, retain the record in question and seek guidance from the analyst assigned to your agency.

Q. What do I do with routing slips, fax cover sheets, “while you were out” slips, memory aids, etc.?

- A.** Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed.

Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails) have minimal value once the official action these records are supporting has been completed and documented. Unless they are listed on the General Records Schedule for Local Government Agencies or your office’s Program Records Retention and Disposition Schedule, these records may be destroyed or otherwise disposed of once the action has been resolved.

Q. What about research materials, drafts, and other working papers used to create a final, official record?

- A.** Drafts and working papers are materials, including notes and calculations, gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of General Statute § 132, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents which may be destroyed after final approval include:

- Drafts and working papers for internal and external policies

³ Society of American Archivists, *Dictionary of Archives Terminology*.

- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that are already formally documented.

Q. What if I have forms designed and used solely to create, update, or modify records in an electronic medium?

- A.** If these records are not required for audit or legal purposes, they may be destroyed in office after completion of data entry and after all verification and quality control procedures. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g. a signature or notary's seal), they should be retained according to the disposition instructions for the records series encompassing the forms' function.

See also the State Archives of North Carolina's guidance on digital signatures found at: <https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/digital-signature-policy>

DESTRUCTION OF PUBLIC RECORDS

Q. When can I destroy records?

- A.** Each records series listed on this schedule has specific disposition instructions that indicate how long the series must be kept in your office. In some cases, the disposition instructions are “Retain in office permanently,” which means that those records must be kept in your offices forever.

Q. How do I destroy records?

- A.** After your agency has approved this records retention and disposition schedule, records should be destroyed in one of the following ways:
- 1) burned, unless prohibited by local ordinance;
 - 2) shredded, or torn so as to destroy the record content of the documents or material concerned;
 - 3) placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned;
 - 4) sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

The provision that electronic records are to be destroyed means that the data, metadata, and physical media are to be overwritten, deleted, and unlinked so that the data and metadata may not be practicably reconstructed.

The data, metadata, and physical media containing confidential records of any format are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.

— N.C. Administrative Code, Title 7, Chapter 4, Subchapter M, Section .0510

Without your agency’s approval of this records schedule, no records may legally be destroyed.

Q. How can I destroy records if they are not listed on this schedule?

- A.** Contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do have historical value, we will discuss the possibility of transferring the records to the State Archives of North Carolina to be preserved permanently.

If the records do not have historical value, we will ask you to complete a [Request for Disposal for Unscheduled Records](#) form if the records are no longer being created. If the records are an active records series, an analyst will help you develop an amendment to this schedule so that you can destroy the records appropriately from this point forward.

Q. *Am I required to tell anyone about the destructions?*

- A.** We recommend that you report on your records retention activities to your governing board on an annual basis. This report does not need to be detailed, but it is important that significant destructions be entered into the minutes of the Board. See a sample destructions log that follows (and is available online at the State Archives of North Carolina website, <https://archives.ncdcr.gov/government/rm-tools>).



Destructions Log

County/Municipality					
Division		Section		Branch	
Location(s) of Records					

[illegible]

ELECTRONIC RECORDS: E-MAIL, BORN-DIGITAL RECORDS, AND DIGITAL IMAGING

Q. When can I delete my e-mail?

- A.** E-mail is a public record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. Electronic mail is as much a record as any paper record and must be treated in the same manner. **It is the content of each message that is important.** If a particular message would have been filed as a paper memo, it should still be filed (either in your e-mail program or in your regular directory structure), and it should be retained the same length of time as its paper counterparts. **It is inappropriate to destroy e-mail simply because storage limits have been reached.** Some examples of e-mail messages that are public records and therefore covered by this policy include:

- Policies or directives;
- Final drafts of reports and recommendations;
- Correspondence and memoranda related to official business;
- Work schedules and assignments;
- Meeting agendas or minutes
- Any document or message that initiates, facilitates, authorizes, or completes a business transaction; and
- Messages that create a precedent, such as issuing instructions and advice.

*From the Department of Cultural Resources E-Mail Policy (Revised July 2009),
available at the State Archives of North Carolina website*

Other publications (available online at the [State Archives of North Carolina website](#)) that will be particularly helpful in managing your e-mail include tutorials on managing e-mail as a public record and on using Microsoft Exchange.

Q. May I print my e-mail to file it?

- A.** We do not recommend printing e-mail for preservation purposes. Important metadata are lost when e-mail is printed.

Q. I use my personal e-mail account for work. No one can see my personal e-mail, right?

- A.** The best practice is to avoid using personal resources, including private e-mail accounts, for public business. N.C. Gen. Stat. § 132-1 states that records “made or received pursuant to law or ordinance *in connection with the transaction of public business* by any agency of North Carolina government or its subdivisions” are public records (emphasis added). The fact that public records reside in a personal e-mail account is irrelevant.

Q. We have an imaging system. Are we required to keep the paper?

- A.** You may scan any record, but you will need to receive approval from the Government Records Section in order to destroy paper originals that have been digitized. Your agency must develop an electronic records policy and then submit a Request for Disposal of Original Records Duplicated by Electronic Means. You can find these templates in the Digital Imaging section of the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines#digital-imaging>). Contact a Records Management Analyst for further instructions on how to develop a compliant electronic records policy.

Permanent records must have a security preservation copy as defined by State Archives of North Carolina's [Human-Readable Preservation Duplicate Policy](#) (N.C. Gen. Stat. § 132-8.2):

Preservation duplicates shall be durable, accurate, complete and clear, and such duplicates made by a photographic, photo static, microfilm, micro card, miniature photographic, or other process which accurately reproduces and forms a durable medium for so reproducing the original shall have the same force and effect for all purposes as the original record whether the original record is in existence or not. ... Such preservation duplicates shall be preserved in the place and manner of safekeeping prescribed by the Department of Natural and Cultural Resources.

The preservation duplicate of permanent records must be either on paper or microfilm.

Non-permanent records may be retained in any format. You will need to take precautions with electronic records that you must keep more than about 5 years. Computer systems do not have long life cycles. Each time you change computer systems, you must convert all records to the new system so that you can assure their preservation and provide access.

Q. Computer storage is cheap. Can I just keep my computer records permanently?

- A.** The best practice is to destroy all records that have met their retention requirements, regardless of format.

Q. What are the guidelines regarding the creation and handling of electronic public records, including text messages and social media?

- A.** There are numerous documents available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines>). Topics covered include shared storage, cloud computing, e-discovery, trustworthy digital public records, digital signatures, e-mail, social media, text messages, websites, digital imaging, metadata, file formats, database indexing, and security backups.

Note that e-mail, text messages, and social media should be handled according to their content. Therefore, this schedule does not include a records series that instructs you on how to handle one of these born-digital records by format; instead of focusing on how the information is disseminated, consider what content is contained in the e-mail, text message, or social media post. For instance, an e-mail requesting leave that is sent to a supervisor should be kept for 3 years. On the General Records Schedule: Local Government Agencies, see Leave Records (Standard 4: HUMAN RESOURCES RECORDS).

GEOSPATIAL RECORDS

Q. Why should geographic information system (GIS) datasets be retained and preserved?

- A.** Geospatial records are public records and need to be retained and preserved based on their legal, fiscal, evidential and/or historical value according to an established retention schedule. Local agencies involved in GIS operations should work with the State Archives of North Carolina in order to appraise, inventory, and preserve their geospatial records according to established best practices and standards to insure both their short- and long-term accessibility.

Due to the complexity and transitory nature of these records, geospatial records retention and long-term preservation is a community-wide challenge. GIS files have become essential to the function of many local agencies and will continue to frequently be utilized in agency decision-making processes in the near and far future. Accessibility of GIS records over time has legal, fiscal, practical, and historical implications. The availability of GIS records can help safeguard the local government's legal and fiscal accountability and aid agencies in conducting retrospective and prospective studies. These studies are only possible when essential data from the past are still available.

Q. What GIS datasets should be preserved by local governments?

- A.** The following types of geospatial records have been designated as having archival value:
- Parcel data
 - Street centerline data
 - Corporate limits data
 - Extraterritorial jurisdiction data
 - Zoning data, address points
 - Orthophotography (imagery)
 - Utilities
 - Emergency/E-911 themes

For more information, see **GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS**.

Q. How often should we capture the datasets retained for their legal, fiscal, evidential or historical value?

- A.** Consult the retention schedule for frequency of capture. The frequency of capture is based on the significance of the record as well as its alterability.

Q. What data formats, compression formats, and media should be used to preserve the data?

- A.** Archiving practices should be consistent with North Carolina Geographic Information Coordinating Council (GICC) approved standards and recommendations. (Examples: Content Standards for Metadata; Data Sharing Recommendations). Consult the GICC website at <https://it.nc.gov/about/boards-commissions/gicc>.

You should also comply with guidelines and standards issued by the State Archives of North Carolina, which are available on its website.

Q. Who should be responsible for creation and long-term storage of archived data?

- A.** The creating agency, NCOneMap, and the State Archives of North Carolina may all have responsibility for archiving data. If you choose to upload your data to NCOneMap, consult with your county's GIS department to determine whether data will be uploaded by your agency or by the whole county. If you choose not to upload your data to NCOneMap, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.

SECURITY PRESERVATION COPIES OF RECORDS

Q. What is the advantage to having security preservation copies of records stored with the State Archives?

- A.** Having duplicate copies of essential records in a separate location mitigates the risk that you may lose the only physical copy of a given record in a disaster or other records loss event. Maintaining offsite duplicates of records, regardless of format, is a good practice to adopt.

The State Archives creates duplicate copies on microfilm because of the durability of the medium. Silver negative microfilm does not decay for hundreds of years, ensuring that your records maintain their integrity over time.

Q. What records will the State Archives back up for us?

- A.** The State Archives provides security imaging services for minutes of major decision-making boards and commissions. We will also image records of adoptions for Social Services agencies as well as maps and plats from Registers of Deeds offices. Once those records are imaged, they are converted to security microfilm. We will store the silver negative (original) microfilm in our security vault. Contact the Records Management Analyst in charge of imaging coordination for the most current information.
-

Q. How do I start the process of backing up the above listed records?

- A.** We have three processes for creating backup film copies of these records. First, you can send photocopies of your approved minutes to us in the mail. Simply include a copy of the **Certification of the Preparation of Records for Security Preservation Copy** form (available online at the [State Archives of North Carolina website](#)) with each shipment. For more detailed instructions, contact a Records Management Analyst.

Secondly, you can bring us your original books. We will film them and return them to you. This process is most useful when you have more minutes to film than you are willing to photocopy. It is important to remember that a representative of your office or ours must transport the original books in person so that the custody of the records is maintained. You should not mail or ship your original minutes. Contact the Records Management Analyst in charge of imaging coordination to schedule an appointment for your books to be imaged. We will make every effort to expedite the filming so that your books will be returned to you as quickly as possible.

Finally, you can submit these records to the State Archives electronically. Please see our procedures in "[Transfer of Minutes in Digital Formats for Microfilming](#)" or contact the Records Management Analyst in charge of imaging coordination for more information.

Q. In the event of a records loss, how do I obtain copies of the security preservation copies stored at the State Archives?

- A.** Contact the Records Management Analyst in charge of imaging coordination who will help you purchase copies of the microfilm from our office. You can then send those reels to a vendor who can either make new printed books or scan the film to create a digital copy.

Q. Can I obtain digital copies of the security preservation records?

- A.** Yes, you can request digital copies of records when you submit them to the State Archives for initial reproduction. Contact the Records Management Analyst in charge of imaging coordination to initiate a request for digital duplicates.

DISASTER ASSISTANCE

Q. What should I do in case of fire or flood?

- A.** Secure the area, and keep everyone out until fire or other safety professionals allow entry. Then, call our Raleigh office at (919) 814-6903 for the Head of the Government Records Section or (919) 814-6849 for the Head of the Collections Management Branch. If you're in the western part of the state, call our Asheville Office at (828) 250-3103. On nights and weekends, call your local emergency management office.

DO NOT ATTEMPT TO MOVE OR CLEAN ANY RECORDS.

Damaged records are extremely fragile and require careful handling. Our staff are trained in preliminary recovery techniques, documenting damage to your records, and authorizing destruction of damaged records. Professional vendors can handle larger disasters.

Q. What help do you give in case of an emergency?

- A.** We will do everything we can to visit you at the earliest opportunity in order to provide hands-on assistance. We can assist you in appraising the records that have been damaged so that precious resources (and especially time) are not spent on records with lesser value. We can provide lists of professional recovery vendors that you can contact to preserve your essential and permanent records.
-

Q. What can I do to prepare for an emergency?

- A.** We provide training on disaster preparation that includes a discussion of the roles of proper inventories, staff training, and advance contracts with recovery vendors. If you would like to have this workshop presented, call a Records Management Analyst.
-

Q. What are essential records?

- A.** Essential records are records that are necessary for continuity of operations in the event of a disaster. There are two common categories of records that are considered essential:
- **Emergency operating records** – including emergency plans and directives, orders of succession, delegations of authority, staffing assignments, selected program records needed to continue the most critical agency operations, as well as related policy or procedural records.
 - **Legal and financial rights records** – these protect the legal and financial rights of the Government and of the individuals directly affected by its activities. Examples include accounts receivable records, Social Security records, payroll records, retirement records, and insurance records. These records were formerly defined as “rights-and-interests” records.

Essential records should be stored in safe, secure locations as well as duplicated and stored off-site, if possible.

STAFF TRAINING

Q. What types of workshops or training do you offer?

- A.** We have a group of prepared workshops that we can offer at any time at various locations throughout the state. Contact a Records Management Analyst if you are interested in having one of the workshops presented to your agency. We will work with you directly to develop training suited to your specific needs. Our basic workshops are:
- Managing public records in North Carolina
 - Disaster preparedness and recovery
 - Digital communications

Q. Will you design a workshop especially for our office?

- A.** Yes, we will. Let a Records Management Analyst know what type of training you need.

Q. Are workshops offered only in Raleigh?

- A.** No, we will come to your offices to present the workshops you need. We have no minimum audience requirement. We will also do presentations for professional associations, regional consortiums, and the public.

To arrange a workshop, please call the State Records Center at 919-814-6900 or contact a Records Management Analyst (<https://archives.ncdcr.gov/government/local/analysts>).

Q. Is there a fee for workshops?

- A.** Not at this time.

Q. Are the workshops available in an online format?

- A.** We can offer a virtual workshop for your agency upon request. For descriptions of available webinars, see <https://archives.ncdcr.gov/government/training/webinars>. You can also find several online tutorials available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/training/online-tutorials-and-resources>).



Request for Change in Local Government Records Schedule

Use this form to request a change in the records retention and disposition schedule governing the records of your agency. Submit the signed original and keep a copy for your file. A proposed amendment will be prepared and submitted to the appropriate state and local officials for their approval and signature. Copies of the signed amendment will be sent to you for insertion in your copy of the schedule.

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and e-mail

Mailing Address

CHANGE REQUESTED

Specify title and edition of records retention schedule being used: _____

☐ Add a new item

☐ Delete an existing item

Standard Number _____ Page _____ Item Number _____

☐ Change a retention period

Standard Number _____ Page _____ Item Number _____

Title of Records Series in Schedule or Proposed Title:

Inclusive Dates of Records:

Proposed Retention Period:

Description of Records:

Justification for Change:

Requested by:

Signature

Title

Date

Approved by:

Signature

Requestor's Supervisor

Date



Request for Disposal of Unscheduled Records

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and e-mail

Mailing Address

In accordance with the provisions of N.C. GEN. STAT. § 121 and § 132, approval is requested for the destruction of records listed below. These records have no further use or value for official administrative, fiscal, historical, or legal purposes.

RECORDS TITLE AND DESCRIPTION	INCLUSIVE DATES	QUANTITY	RELEVANT STATUTORY REGULATIONS	PROPOSED RETENTION PERIOD

Requested by:

Signature

Title

Date

Approved by:

Signature

Requestor's Supervisor

Date

Concurred by:

Signature

Assistant Records Administrator
State Archives of North Carolina

Date



Request for Disposal of Original Records Duplicated by Electronic Means

If you have questions, call (919) 814-6900 and ask for a Records Management Analyst.

This form is used to request approval from the Department of Natural and Cultural Resources to dispose of non-permanent paper records that have been scanned, entered into databases, or otherwise duplicated through digital imaging or other conversion to a digital environment. This form does not apply to records that have been microfilmed or photocopied or to records with a permanent retention.

Agency Contact Name:		Date (MM-DD-YYYY):
Phone (area code):	E-mail:	
County/Municipality:	Office:	
Mailing address:		

Records Series Title A group of records as listed in records retention schedule	Description of Records Specific records as referred to in-office	Inclusive Dates (1987-1989; 2005-present)	Approx. Volume of Records (e.g. "1 file cabinet," "5 boxes")	Retention Period As listed in records retention schedule

Requested by:

Signature

Title

Date

Approved by:

Signature

Requestor's Supervisor

Date

Concurred by:

Signature

Assistant Records Administrator
State Archives of North Carolina

Date



File Plan

County/Municipality					
Division		Section		Branch	

[illegible]

INDEX

- 911 COMMUNICATION RECORDS AND RECORDINGS, 12
- ADMISSION RECORDS, 16
- AFFIRMATIVE ACTION FILE (AIRPORT), 1
- AIR POLLUTION SOURCE INFORMATION, 5
- AIR SPACE CONSTRUCTION FILES, 1
- AIRFIELD INSPECTION FILES, 1
- AIRPORT ACCESS CONTROL RECORDS, 1
- AIRPORT MASTER RECORD FILES, 1
- ALARM CALL REPORTS, 53
- ALTERNATIVE SENTENCING PROGRAMS, 53
- AMBULANCE CALL REPORTS, 12
- AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT RECORDS, 31
- AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT VOUCHERS, 31
- AMERICANS WITH DISABILITIES ACT (ADA) PRE-TRIP INSPECTION FORMS, 31
- ANIMAL ABUSE AND CRUELTY RECORDS, 3
- ANIMAL COMPLAINT RECORDS, 3
- ANIMAL CONTROL RECORDS, 3
- ANIMAL LICENSING RECORDS (ANIMAL SERVICES), 4
- ANIMAL LICENSING RECORDS (TAX), 73
- ANIMAL SHELTER RECORDS, 4
- APPRAISAL PROJECT FILE (PUBLIC HOUSING), 25
- APPRAISAL REPORTS (STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING), 46
- ARREST PROCESSING TRACKING RECORDS, 53
- ARREST REPORTS, 54
- ART-IN-TRANSIT APPLICATIONS, 32
- AUCTION RECORDS, 54
- AUDIO AND VIDEO RECORDINGS (LAW ENFORCEMENT), 67
- BEER AND WINE TAXES AND RECORDS, 73
- BICYCLE LICENSE PLATE RECORDS, 73
- BLUEPRINTS AND SPECIFICATIONS, 5
- BOARD OF ADJUSTMENT CASE FILE, 19
- BUILDING AND FIRE SAFETY SYSTEM PLANS, 13
- BUILDING AND ROAD PERMITTING AND INSPECTION RECORDS, 6
- CASE FILE - FELONIES, 54
- CASE FILE - MISDEMEANORS, 55
- CEMETERY DEEDS, 46
- CEMETERY INTERMENT RECORDS, 46
- CERTIFICATES OF APPROPRIATENESS, 20
- CERTIFICATION FILE. *See* Redevelopment Plans
- CHEMICAL ANALYSIS RECORDS. *See* DRUG AND ALCOHOL TESTING RECORDS
- CITATIONS RECORDS, 16
- COMMUNICATION RECORDS (LAW ENFORCEMENT), 55
- COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS, 26
- COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: OUTSTANDING LOAN BALANCES, 26
- COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: SUBJECT TO REVERSION OF ASSETS PROVISIONS OR CHANGE OF USE OF REAL PROPERTY, 26
- COMPLAINTS (LAW ENFORCEMENT), 56
- COMPOSITE INTERVIEWS, 56
- COMPREHENSIVE PLAN AND AMENDMENTS, 20
- COMPREHENSIVE SOLID WASTE MANAGEMENT PLAN & AMENDMENTS, 34
- CONTINUUM OF CARE RECORDS, 27
- CONTROLLED SUBSTANCE EUTHANASIA LOG (ANIMAL SERVICES), 4
- CONTROLLED SUBSTANCE LABS DECONTAMINATION RECORDS, 6
- CRIME ANALYSIS RECORDS, 56
- CRIMINAL RECORDS CHECKS, 27
- CUSTOMER (RIDER) IDENTIFICATION RECORDS, 32
- CUSTOMER USAGE RECORDS, 34
- DAILY DISPOSAL TICKETS (LANDFILL), 34
- DECLARATIONS AND BY-LAWS FROM TOWNHOUSES, CONDOMINIUMS, PLANNED RESIDENTIAL DEVELOPMENTS, AND COMMON AREAS, 21
- DELINQUENT TAXPAYER RECORDS, 74
- DELINQUENT TAXPAYER RECORDS - ADVERTISEMENT OF TAX LIENS AGAINST REAL PROPERTY, 74
- DESTRUCTIONS LOG, A-10
- DETENTION FACILITY INCIDENT REPORTS, 57
- DETENTION FACILITY OPERATIONAL RECORDS, 57
- DETENTION FACILITY PHYSICAL FORCE RECORDS, 57
- DISADVANTAGED BUSINESS ENTERPRISE (DBE) RECORDS, 32
- DISCHARGE MONITORING REPORTS, 35
- DISCOUNT PASSES APPLICATIONS, 32
- DISPATCH RECORDS AND RECORDINGS (EMS AND FIRE DEPARTMENT), 13
- DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) ENTRIES, 58
- DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) VALIDATION RECORDS, 58
- DNA SAMPLING RECORDS, 58
- DOMESTIC VIOLENCE RECORDS, 59
- DROUGHT CONTINGENCY PLANS, 6
- DRUG AND ALCOHOL TESTING RECORDS, 59

ELECTRIC POWER AND NATURAL GAS FACILITY
 ENGINEERING & SYSTEM PLANS, 39
 ELECTRIC POWER AND NATURAL GAS PERMITS AND
 APPROVAL RECORDS, 39
 ELECTRIC POWER AND NATURAL GAS SYSTEM
 MAINTENANCE & REPAIR RECORDS, 39
 ELECTRIC POWER AND NATURAL GAS SYSTEM
 MANAGEMENT PLANS, 39
 ELECTRIC POWER AND NATURAL GAS SYSTEM PROJECT
 RECORDS, 40
 ELECTRONIC RECORDINGS OF INTERROGATIONS, 60
 EMERGENCY SOLUTIONS GRANTS (ESG) RECORDS, 28
 ENVIRONMENTAL IMPACT STUDIES, 21
 EROSION AND SEDIMENT AFFIDAVITS, 36
 EROSION AND SEDIMENT CONTROL ENFORCEMENT CASES,
 6
 EROSION AND SEDIMENT CONTROL EXHIBIT RECORDS, 37
 EROSION AND SEDIMENT CONTROL INSPECTIONS, 37
 EROSION AND SEDIMENT CONTROL PERMITS, 37
 EROSION AND SEDIMENT CONTROL PLANS, 7, 37
 EXCAVATION PERMITS, 47
 EXEMPTIONS (VARIANCE) RECORDS, 7
 FAÇADE PROJECT FILES, 28
 FIELD OBSERVATIONS, 60
 FILE PLAN, 22
 FINGERPRINT CARDS, 61
 FIRE ALARM AND AUTOMATIC EXTINGUISHER FILE, 13
 FIRE DISPATCH FILE, 13
 FIRE INVESTIGATION CASE FILES, 14
 FIRE SAFETY INSPECTIONS AND PERMITS, 14
 FLOOD CERTIFICATIONS, 38
 FLOOD STUDIES, 38
 FORCIBLE ENTRY RECORDS, 61
 FUGITIVE WARRANTS CASE RECORDS, 61
 GOING OUT OF BUSINESS LICENSES, 7
 GRAVE OPENING ORDERS, 47
 GROUNDWATER MONITORING RECORDS, 7
 HISTORIES OF PET OWNERS, 4
 HOME INVESTMENT PARTNERSHIPS PROGRAM RECORDS,
 29
 HOUSING ASSISTANCE FOR PERSONS WITH DISABILITIES,
 29
 HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS
 (HOPWA) RECORDS, 30
 IDENTIFICATION PHOTOGRAPHS, 62
 ILLEGAL DUMPING FILE, 7
 INCIDENT RESPONSE REPORTS, 62
 INFRASTRUCTURE MAINTENANCE RECORDS, 47
 INMATE CLASSIFICATION RECORDS, 62
 INMATE COMMITMENT RECORDS, 63
 INMATE DEATH REPORTS, 63
 INMATE FINANCIAL RECORDS, 63
 INMATE GRIEVANCE RECORDS, 64
 INMATE MAIL, TELEPHONE, OR VISITOR RECORDS, 64
 INMATE MEAL RECORDS, 64
 INMATE MEDICAL RECORDS, 65
 INMATE PERSONAL IDENTIFICATION RECORDS, 65
 INMATE RESEARCH REQUESTS, 66
 INSPECTIONS, 7
 JUVENILE CASE HISTORY FILES, 66
 JUVENILE CASE HISTORY IDENTIFICATION RECORDS, 66
 JUVENILE DETENTION RECORDS, 66
 LABORATORY CASE RECORDS, 67
 LABORATORY OPERATIONS RECORDS, 44
 LAND DEVELOPMENT AND PLANNING STUDIES AND
 REPORTS (AIRPORT), 2
 LAND MARKETING AND DEVELOPMENT RECORDS. *See*
 HOME Investment Partnerships Program Records
 LANDFILL MONITORING REPORTS, 35
 LANDFILL OPERATIONAL PLAN, 35
 LANDFILL PERMITS, 36
 LANDFILL TONNAGE AND COST FILE, 8
 LANDLORD AGREEMENTS (UTILITIES), 40
 LANDLORD MONITORING RECORDS, 30
 LEAD AND COPPER COMPLIANCE RECORDS, 8
 MAPS (UTILITY INSTALLATIONS & DISTRIBUTIONS), 40
 METER TESTING AND CALIBRATION RECORDS (ELECTRIC,
 WATER, GAS), 41
 MOTOR VEHICLE RENTAL TAX RECORDS, 74
 MULTIPLE FIREARMS SALES REPORTS, 67
 MULTIPLE FIREARMS SALES REPORTS DESTRUCTION
 RECORDS, 67
 MUNICIPAL VEHICLE TAX RECORDS, 74
 NORTH CAROLINA FIRE INCIDENT REPORT, 14
 NOTICE OF VIOLATIONS FOR IMPROPER DISCHARGE OR
 DISPOSAL FILE, 36
 OFFICIALS FILE, 16
 OPEN SPACE CLASSIFICATION CASE FILE, 21
 OPERATOR SHIFT INSPECTION RECORDS, 32
 ORDINANCE VIOLATIONS CITATIONS, 68
 OUTSIDE WASTE CLEARANCE RECORDS, 36
 PARKS PLANNING FILE, 17
 PATIENT CARE REPORTS, 12
 PAWNSHOP RECORDS, 68
 PERMISSION TO SEARCH RECORDS, 68
 PERMITS
 CONSTRUCTION, 8
 HANDGUN, 69
 PUBLIC UTILITIES PROJECTS, 8
 TEMPORARY MANUFACTURED HOME, 22
 ZONING COMPLIANCE, 22
 PETITION & REGULATION RECORDS, 22
 PHARMACEUTICAL AND NARCOTICS RECORDS, 15

PLANNING FILE (STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING), 47
 PLANNING REVIEW CASE FILE, 23
 POOL RECORDS, 17
 PREPARED FOOD AND BEVERAGE TAX RECORDS, 74
 PRETREATMENT PROGRAM RECORDS, 44
 PRISON RAPE ELIMINATION ACT (PREA) DATA FILE, 69
 PRISON RAPE ELIMINATION ACT (PREA) FILE, 69
 PRISONER AND MENTAL PATIENT TRANSPORT RECORD, 69
 PRIVILEGE LICENSES, TAXES, AND FEE RECORDS, 75
 PROJECT RECORDS – CANCELLED (PUBLIC WORKS AND ENGINEERING), 47
 PROJECT RECORDS – CORE (PUBLIC WORKS AND ENGINEERING), 48
 PROJECT RECORDS – ENGINEERING & COMPLIANCE, 49
 PROJECT SHEETS FILE (STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS, 50
 PROPERTY MANAGEMENT RECORDS. *See* HOME Investment Partnerships Program Records
 PROPERTY RECORDS - STOLEN AND RECOVERED, 70
 PUBLIC UTILITIES INSPECTION FORMS, 41
 PUBLIC UTILITIES SYSTEM ENGINEERING, MAINTENANCE, AND REPAIR, RECORDS, 42
 PUBLIC WATER SANITARY SURVEY RECORDS, 44
 PURSUIT LOGS, 70
 RABIES VACCINATION RECORDS, 4
 RADIO LOGS (AIRPORT), 2
 RECREATION PROGRAMS, 17
 RECREATIONAL VEHICLE REGISTRATION RECORDS, 9
 RECYCLING WATER RECORDS, 42
 REDEVELOPMENT PLANS (PUBLIC HOUSING AND REDEVELOPMENT COMMISSION RECORDS), 30
 REHABILITATION RECORDS. *See* HOME Investment Partnerships Program Records
 RELOCATION RECORDS. *See* HOME Investment Partnerships Program Records
 REPORTS
 DAILY WATER AND WASTEWATER FACILITY OPERATORS LOGS, 38
 ENVIRONMENTAL PROTECTION AGENCY (EPA), 36
 WASTEWATER MAINTENANCE OPERATIONS, 43
 REQUEST FOR CHANGE IN LOCAL GOVERNMENT RECORDS SCHEDULE, A-19
 REQUEST FOR DISPOSAL OF ORIGINAL RECORDS DUPLICATED BY ELECTRONIC MEANS, A-21
 REQUEST FOR DISPOSAL OF UNSCHEDULED RECORDS, A-20
 REZONING RECORDS AND INDEXES, 23
 RIDE-ALONG PROGRAM RECORDS, 70
 RIGHT-OF-WAY ACQUISITION WORKING RECORDS, 50
 ROOM OCCUPANCY TAX RECORDS, 75
 ROUTE HISTORY RECORDS, 33
 SCHEDULE "B" LICENSES, 76
 SEAT BELT AND RESTRAINT SYSTEM RECORDS, 33
 SERVICE INTERRUPTION RECORDS, 42
 SEWER JETTING AND VECTORING RECORDS, 45
 SEXUAL OFFENDER RECORDS, 70
 SLUDGE TREATMENT RECORDS, 45
 SOCIAL MEDIA, A-12
 SPECIAL USE PERMIT RECORDS AND INDEX, 21
 STORMWATER DEVIATION PERMITS, 45
 STREET NAME AND HOUSE NUMBER FILES, 50
 STRUCTURAL MAINTENANCE AND ANALYSIS RECORDS, 51
 SUBDIVISION RECORDS, 24
 SURVEY FIELD RECORDS, 51
 TAP AND HOOK UP RECORDS, 43
 TAX ABSTRACTS AND LISTS, 76
 TAX EXEMPT PROPERTY FILE, 76
 TAX LEDGER CARDS OR SHEETS, 76
 TAX LEVY AND SEIZURE RECORDS, 77
 TAX LIEN SALES, 77
 TAX REBATES, 77
 TAX SCROLLS, 77
 TAXICAB AND LIMOUSINE TAX RECORDS, 77
 TEXT MESSAGES, A-12
 TICKET STUBS, 18
 TRAFFIC ACCIDENT REPORTS, 71
 TRAFFIC ANALYSIS, 51
 TRAFFIC CITATIONS, 71
 TRAFFIC VIDEO RECORDINGS AND DATA, 52
 TRAFFIC WARNINGS, 71
 TRANSIT SCHEDULES, 33
 TRANSIT SERVICE APPLICATIONS, 32
 TRESPASS RECORDS, 72
 TROUT BUFFER VARIANCES, 38
 UNSAFE BUILDINGS FILE, 9
 VALVE OPERATION FILE, 9
 VANPOOL DRIVER APPLICATIONS, 33
 VARIANCES (PLANNING AND REGULATION OF DEVELOPMENT), 24
 VEHICLE TOWING RECORDS, 72
 VIOLATIONS
 BUILDING AND HOUSING, 9
 SOLID WASTE MANAGEMENT, 10
 WATER CONSERVATION, 10
 ZONING, 24
 WASTEWATER POLLUTION CONTROL AND ABATEMENT RECORDS, 10
 WASTEWATER QUALITY ANALYSIS RECORDS, 10
 WATER & WASTEWATER PERMITS & APPROVAL RECORDS, 43
 WATER & WASTEWATER SYSTEM INSPECTIONS & TESTS, 45
 WATER ANALYSIS, 11
 WATER QUALITY VIOLATION RECORDS, 45

WATER SYSTEM OPERATIONS RECORDS, 11

WATER TANKS, SPECIFICATIONS, AND BOOSTER STATIONS
FILE, 11

**A RESOLUTION ADOPTING THE 2021 PROGRAMS RECORDS
SCHEDULE (2022 - 20)**

WHEREAS, North Carolina General Statute § 132-1 defines public records as documents, maps, photographs, recordings, and other items in various media that are made or received in connection with the transaction of public business; and

WHEREAS, North Carolina General Statute § 121-5 prohibits disposal of any public record without the consent of the North Carolina Department of Natural and Cultural Resources; and

WHEREAS, the Department of Natural and Cultural Resources' Municipal Records Retention and Disposition Schedule identifies how long certain records must be retained in accordance with state and federal laws, rules, and regulations; and

WHEREAS, municipalities that adopt the Municipal Records Retention and Disposition Schedule, may lawfully dispose of certain records at the end of those records' retention periods, so long as those records are not needed for audit or legal purposes or in support of Town business; and

WHEREAS, the Town of Wake Forest currently manages records under a version of the General Records Schedule adopted by Town Board of Commissioners in December 2021 and

WHEREAS, the Department of Natural and Cultural Resources has issued an updated Program Records Schedule which updates the following listed records: Code Enforcement and Inspection Records, Fire Department Records, Parks and Recreation Records, Planning and Regulation of Development Records, Public Utilities & Waste Management, Street Maintenance, Public Works & Engineering Records, Law Enforcement, and Tax Records. The updated schedule also has multiple appendix items to assist with geospatial records, disasters and training.

NOW, THEREFORE, BE IT RESOLVED by the Council of the Town of Wake Forest that the Council adopts the 2021 Program Records Schedule for Local Government Agencies and that this Schedule supersedes the Schedule adopted by the Town Board in 2009 and is supplemental to the General Records Schedule that was adopted in December 2021.

Approved this 19th day of APRIL, 2022.

ATTEST:

Vivian A. Jones, Mayor

(Deputy) Town Clerk



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-543-

Submitted by: Terry Savary

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Approval of Appointments to Citizen Advisory Boards

Recommendation:

Item Summary:

ATTACHMENTS

- [Resolution2022-18_AdvisoryBoardAppointment-HPCApril202219.pdf](#)
- [Resolution2022-19_AdvisoryBoardAppointmentTABApril202219.pdf](#)

RESOLUTION 2022 - 18

ADVISORY BOARD/COMMISSION APPOINTMENTS
FOR THE TOWN OF WAKE FOREST, NORTH CAROLINA

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Town of Wake Forest, North Carolina, that the following persons be appointed to the following citizen advisory boards:

Historic Preservation Commission

Melvin Hill, Jr.

(Partial Term April 19, 2022 – December 2022)

Angela Wright

(Partial Term April 19, 2022 – December 2024)

Duly resolved this 19th day of April 2022.

ATTEST:

Vivian A. Jones, Mayor

(Deputy) Town Clerk

RESOLUTION 2022 - 19

ADVISORY BOARD/COMMISSION APPOINTMENTS
FOR THE TOWN OF WAKE FOREST, NORTH CAROLINA

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Town of Wake Forest, North Carolina, that the following persons be appointed to the following citizen advisory boards:

Technology Advisory Board

Michael Hancock

(Partial Term April 19, 2022 – December 2022)

Duly resolved this 19th day of April 2022.

Vivian A. Jones, Mayor

ATTEST:

(Deputy) Town Clerk



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-547-

Submitted by: Jeanette Johnson

Submitting Department: Public Works

Meeting Date: April 19, 2022

SUBJECT

Approval of Acceptance of Grant - North Carolina Department of Environmental Quality 2022 Community Waste Reduction and Recycling Grant

Recommendation:

Approve the Town's acceptance of the NCDEQ 2022 CWRAR Grant offer of \$24,000 for curbside residential recycling program improvements in the Town.

Item Summary:

ATTACHMENTS

- [SUMMARY_NDCEQ_CWRAR_Grant_4.19.2022.docx](#)
- [Johnson_Jeanette_2022_CWRAR_Grant_Adjusted_Sandy_Skolochenko_NCDEQ_Approval.docx](#)
- [2022 CWRAR RFP.pdf](#)
- [NCDEQ CWRAR 2022_Grant Award and Guidelines for Acceptance of Grant.pdf](#)
- [Resolution Approval of Acceptance_2022 NCDEQ CWRAR Grant Award.docx](#)

Agenda Item: Approval of Acceptance of Grant - North Carolina Department of Environmental Quality
2022 Community Waste Reduction and Recycling Grant

Summary: The Town has received an offer of \$24,000 for fiscal year 2022-2023 from the NCDEQ for the 2022 Community Waste Reduction and Recycling Grant for continuing improvement of the Town's recycling collection program.

The grant has been offered for the use of purchasing larger 96-gallon, blue lid, recycling carts to provide room for more recyclables collections per household. Additionally, the grant can also be used on printed educational resources like postcards and cart tags regarding "Recycling Right" and contamination reduction efforts within the recycling stream in the Town of Wake Forest.

The requested action is to approve of the acceptance of the North Carolina Department of Environmental Quality 2022 Community Waste Reduction and Recycling Grant of \$24,000 for fiscal year 2022-2023.

Attachments: Johnson_Jeanette_2022 CWRAR Grant_Adjusted_Sandy Skolochenko
NCDEQ_Approval.docx

2022 CWRAR RFP.pdf

NCDEQ CWRAR 2022_Grant Award and Guidelines for Acceptance of Grant.pdf

Resolution Approval of Acceptance_2022 NCDEQ CWRAR Grant Award.docx

2022 CWRAR Grant

Town of Wake Forest Contamination Reduction Program

Applicant Contact Information:

Jeanette Johnson, Recycling Coordinator
Town of Wake Forest Public Works
234 Friendship Chapel Rd
Wake Forest, NC 27587
919.435.9585 Phone
jjohnson@wakeforestnc.gov

Date of Proposal Submittal: February 17, 2022

General Requirements:

Usage of N.C. Solid Waste Disposal Tax Proceeds:

Wake County Solid Waste Disposal Tax Proceeds are used only for solid waste management purposes per requirements of N.C. G.S. 105-187.63. These purposes include landfill management, convenience site recycling and waste transportation, necessary operations equipment, qualified staff salary, and recycling related costs.

Public Building Recycling Services:

Government buildings located in the Town of Wake Forest have standard recycling bin access, all employees have a recycling bin in their office and a recycling guide for proper recycling. Additionally, cleaning staff members are trained on proper recycling disposal and are cautious of contamination when collecting. Recycling bins and recycling guides are also available in communal locations. Town of Wake Forest employees and visitors are encouraged to use the recycling bins located at these locations.

Mercury Product Recycling:

When fluorescent lights and mercury containing thermostats are replaced and removed from Town of Wake Forest public buildings and properties, the maintenance crew overseeing said removal brings ensures responsible recycling through a private vendor. New installed lighting is not fluorescent and do not contain mercury.

Project Description:

The Town of Wake Forest has been working to remove contamination from the residential recycling stream in the community and provide proper recycling information to all residents. This is an effort they plan to continue for many years to come but are working to expand on the program that has recently started to get to a point where the Town can maintain the program long term. Currently, the Town utilizes a contractor (Republic Services) to collect curbside single stream recyclable items from household recycling carts. Items that can be collected in the single stream curbside cart include clean, empty, and rinsed household plastics (like jugs, tubs, bottles, plastic jars, etc.), clean, emptied, and rinsed metal cans (like aluminum cans and steel cans), clean, emptied, and rinsed household glass (bottles and jars), non-contaminated mixed paper (not shredded, not tiny, etc.), and non-contaminated cardboard (flattened and clean). The Town has developed a process to greatly reduce contamination moving forward. First steps of the process have included providing as much information as possible to the public about proper recycling and disposal in the Town of Wake Forest. The Town has worked on many different products for the benefit of proper recycling education to community members; examples are listed below:

- Series of graphics and informational posts for all social media accounts
 - o <https://www.wakeforestnc.gov/RecycleRightWF>
- Produced video on proper recycling to better explain and visualize proper procedure
 - o <https://vimeo.com/414814015>

- Updated and distributed trash/recycling guides that are accurate and up to date
 - o https://issuu.com/bmartinson/docs/final_guide_to_solid_waste_2021?fr=sZjAyNTI0ODE0NTU
 - o See figure 3 below
- Provide educational materials at public events
- Created a sorting game for the community to play and learn from
 - o <https://wakeforest.recycle.game/>
- Created and updated Web Pages that reflect proper recycling guidelines in Wake Forest
 - o <https://www.wakeforestnc.gov/public-works/solid-waste/recycling>
 - o <https://www.wakeforestnc.gov/meetings-events/earth-day-activities-projects>
- Included recycle right information in local publications in the Town
 - o See figures 4 & 5 below
 - o https://issuu.com/bmartinson/docs/final_digital_mayjune_2021_our_town?fr=sMjc1NTI0ODE0NTU
- Conducted in person and virtual presentations on recycling correctly
- Truck Wraps for Advertisement of Education
 - o See an example in figure 6 below
- Mass sticker distribution on existing recycling carts
 - o See figure 7 below
- Upgrading recycling carts to larger carts with recycling guide sticker on it
 - o See figure 8 below

Currently, the Town is still in an educational period and needs resources to properly educate the community and needs cart to upgrade community members to larger recycling cans so the Town can move forward with our consistent, long term recycling contamination prevention plan. In addition to education, the Town has been working to upgrade old, small, black lid recycling carts (48- gallon carts) to

new, large, blue lid recycling carts (96-gallon). The new carts double the amount of space in the cart for recycling while decreasing confusion (blue lid versus black lid) and becoming more consistent with color coordination in conjunction with other municipalities where many residents come from. Last fiscal year, the Town upgraded 499 recycle carts and average about 52 upgrades per month. This does not include the number of carts for newly constructed homes being distributed daily. Additionally, smaller older carts are being repurposed to yard waste carts for our organics collection program to embrace the “3 R’s” of waste prevention and provide an additional waste diversion resource to our residents. Within the next year, the Town has several items planned for contamination prevention education and increased recycling access:

- Print and mail 15,701 graphic focused recycle right post cards to all residents at a current cost of \$6,613
- Purchase 10,000 cart tags for cart tagging of recycling contamination at a cost of \$2,263.64
- Complete truck wrap advertisements for “Recycle Right” for our leaf collection trucks at a current cost of \$1,594.82
- Purchase 700 blue lid 96-gallon recycle carts to continue to upgrade residents to larger, color coordinated recycling carts for more accessibility of household single stream recycling at a current cost of \$39,550.00
- Purchase 5,000 Solid Waste, Recycling, & Yard Waste Guides for distribution to newly constructed homes and residents requesting the information at a current cost of \$1,985.70
- Extend our contract for the Waste Wizard tool and associated games at a cost of \$7,614
- Purchase recycling related products to engage and educate community members at a budget of \$3,500

Additionally, to provide more specific recycling education, the Town of Wake Forest has begun tagging individual carts for violations. The process is to complete a period of time of educational tagging, after that time period, the Town has developed a “Three strikes to get it Right!” concept to put in place to

reduce contamination. The first violation would be education on precisely what items are in the cart that cannot be accepted. The second violation would result in a disposal rejection. The Town anticipates that after recycling rejection, residents will work to take corrective action and put the correct items in the bin. However, in the occasion that a resident is still not getting the correct items in the container, then the Town will work with the contractor (Republic Services) to continue to reject loads for a “time out” period and require residents to play the “Wake Forest Citizen’s Waste Rescue Game” and provide a certification of completion to reinstate services. The Town certainly wants to take the approach of guiding residents to recycle correctly but also want to recycle. With taking the approach of making incorrect disposal inconvenient but not removing services and utilizing the game as an educational tool, the Town hopes to see proper and correct recycling improve.

Description of purchases to be made with grant funds:

The Town of Wake Forest intends to utilize any grant funds of \$24,000 to purchase 700 96-gallon recycling carts with blue lids, to purchase at least 10,000 cart tags for tagging, and to fund the printing and mail cost of 15,701 recycle right post cards. These educational products and collection containers will allow for the Town of Wake Forest to decrease contamination, educate on proper disposal and recycling, and provide a larger container to increase the collection of valuable content.

Description of the anticipated life of service:

The anticipated life of service for all educational materials would extend past the item itself. To elaborate, the education of proper recycling can remain relevant for many years and even generations to come while the paper itself will not likely last more than a few years. Unless the content of the education needs to be updated then the content of the materials will still be relevant and will remain in the minds of our community members. The recycling carts the Town is seeking to purchase tend to last quite some time. Our preferred supplier, Toter, has heavy, dense plastic carts that last for quite some time. Occasionally, the Town does replace wheels and lids. The recycling carts last about 15+ years and the lids and wheels can last 5-10 years on a regular basis. With the recycling education the Town has been

providing, it is necessary for the Town to also update the carts that residents are using to provide double the capacity for recyclables.

Number of households that will have access to recycling services:

Currently, the Town of Wake Forest provides solid waste, recycling, bulk, and yard waste collection services to 15,701 households. However, the Town experiences a growth of an average of 70 new homes a month. That adds up to about 840 new households annually with no signs of slowing down at this time. All new residents receive large, 96-gallon, blue lid recycling carts for their home. The larger recycling carts and Recycle Right/ proper disposal education are essential tools to the disposal success of Town of Wake Forest residents.

Estimate of the waste reduction impact of the proposed project:

The Town of Wake Forest is home to many individuals with incredibly diverse backgrounds. Many new residents come from areas where recycling was a common practice and standard and intend to keep doing it in their new community. The guidance, recycle right education, proper disposal education and tools, and the large, 96-gallon, blue lid recycling cart provides a means for these individuals to partake in the community recycling program and contribute valuable materials. The additional space in the larger recycling bins will help to double the recycling quantities collected from the Town of Wake Forest. Last fiscal year (June 2020- July 2021) 3,583.56 tons of recycling were collected and processed, and the price of contamination disposal cost the Town \$187,291.76 in contaminated recycling disposal fees. The Recycle Right Campaign was launched in the late spring of 2021 and the recycling contamination disposal cost eventually diminished from the invoices as a result as seen in figure 9 through figure 26 below. Currently, the Town's recycling rate averages about 22% per month. Through diligent recycling education and increased access to recycling disposal receptacles, the Town is determined to increase the number of recyclables being collected in Town of Wake Forest recycling carts while ensuring the best quality recyclable products make it into the cart properly. The goal for the Town, as a community, is to reach the average recycling rate of 32%. The Town aims to decrease waste that is

going into landfills by 10% over the next 5 years. Accessibility of disposal receptacle and persistent and easy-to-understand education are the target methods of use to improve and increase recycling efforts throughout the Town of Wake Forest community.

Project Timeline:

- August 31, 2022: Carts and educational materials purchased
- May 15, 2023: Submit all invoices and draft final report to NC DEACS
- June 30, 2023: Submit Final Report to NC DEACS

Project Budget:

Grant Project Elements – Adjusted for \$24,000			
Project Elements	Project Costs	State Grant Award Adjusted	Applicant Cash Match Adjusted
96 Gallon Recycle Carts with Blue Recycling Lids (700)	\$39,550	\$17,000	\$22,550
Post Card on Recycle Right Education Printing Mailing (15,701) and Cart Tags for Contamination Prevention and Reduction (10,000)	\$8,876.64	\$7,000	\$1,876.64
Project Budget	Total Project Cost	State Grant Award	Applicant Cash Match
TOTAL	\$48,426.64	\$24,000	\$24,426.64
Additional Wake Forest Project Elements			
Project Elements	Project Costs		Applicant Project Costs
Solid Waste Guide Printing/ Mailing January 2021 (Paid)	\$14,651		\$14,651
Solid Waste Guide Printing/Mailing December 2021/January 2022 (Paid)	\$12,383		\$12,383
Paper Bag Mandate Post Card (Has encouraged residents to upgrade to larger carts) (Paid)	\$6,613		\$6,613
Recycle Right Video (Paid)	\$3,577		\$3,577
Recycle Right Truck Wrap Education Advertisement	\$1,594.82		\$1,594.82
Solid Waste, Recycle, Yard Waste Guides (5,000)	\$1,985.70		\$1,985.70
Waste Wizard – (Town Paid) (Contracted Services)	\$7,614		\$7,614
Recycle Right engagement educational products for community events	\$3,500		\$3,500
Project Budget	Total Project Cost		Additional Wake Forest Investment
TOTAL Additional Wake Forest Investment	\$51,918.52		\$51,918.52
OVERALL PROJECT TOTAL	Overall Total	State Grant Award	Applicant Total Cash Match
OVERALL TOTAL	\$100,345.16	\$24,000	\$76,345.16

Figures



Figure 1- Recycling Post Card Sample





Non-Collection Notice

Dear Customer: We could not collect your item(s) for the following reason(s) checked. Please remove any uncollected items within 24 hours of your regularly scheduled collection day.

TRASH

- ☐ Cart is overfull, too close to another cart or blocked
- ☐ Cart weighs more than 200 pounds
- ☐ Placed in the wrong cart or improper container
- ☐ Contains recyclables or yard waste
- ☐ Contains hazardous materials (paint, oil, chemicals) or prohibited waste
- ☐ Contains soil, concrete or brick
- ☐ Other _____

RECYCLABLES

- ☐ Cart is overfull, too close to another cart or blocked
- ☐ Cart weighs more than 200 pounds
- ☐ Placed in the wrong cart or improper container
- ☐ Contains refuse or yard waste
- ☐ Contains hazardous materials (paint, oil, chemicals) or prohibited waste such as pet waste
- ☐ Not properly prepared
- ☐ Contained in a plastic bag
- ☐ Other _____

BULK TRASH

- ☐ Cardboard needs to be broken down
- ☐ Items must be scheduled for a bulk collection
- ☐ Electronics are not eligible for curbside pickup
- ☐ Items not placed in the right-of-way for collection

YARD WASTE

- ☐ Bag, household container or bundle weighs more than 50 pounds
- ☐ Cart weighs more than 200 pounds
- ☐ Placed in the wrong cart or improper container
- ☐ Contains refuse or recyclables
- ☐ Contains hazardous materials (paint, oil, chemicals) or prohibited waste such as pet waste
- ☐ Contains soil, concrete or brick
- ☐ Exceeds 4 cubic yards permitted per household
- ☐ Ordinance prohibits pickup of waste from contractors
- ☐ Other _____

LOOSE LEAVES

- ☐ Limbs, leaves and trash must be separated
- ☐ Do not block roadway with leaves; place behind curb
- ☐ Leaves were blocked
- ☐ Leaves contain soil, rocks and/or limbs
- ☐ Leaves contain concrete or brick
- ☐ Leaves are bagged
- ☐ Other _____

SOLID WASTE DISPOSAL LOCATIONS

TRASH, RECYCLING AND HAZARDOUS WASTE:
 North Wake Multi-Material Recycling Center
 9029 Deponie Drive, Raleigh | 919.870.4006

TRASH AND RECYCLING:
 3913 Little Liles Road, Wake Forest
 2001 Durham Road, Hwy 98, Wake Forest
wakegov.com/recycling

Town of Wake Forest | Public Works Department
 234 Friendship Chapel Road, Wake Forest, NC 27587
919.435.9570 | wakeforestnc.gov

Figure 2- Cart Tagging Tag Sample

RECYCLING

RECYCLING

What's Accepted						What's Not Accepted <i>Reuse or put these in the trash</i>				
PAPER										
	mixed paper not shredded	paperboard cartons	cardboard flatten boxes	cartons empty and rinsed	paper egg carton	small paper pieces	shredded paper	hardcover books binding not recyclable	soiled take-out containers	soiled cardboard
PLASTIC										
	drink bottles empty and rinsed, screw on caps, do not crush	plastic jars empty and rinsed	plastic bottles empty and rinsed, no pumps	plastic jugs empty and rinsed	plastic containers empty and rinsed, no lids	plastic baggies & pouches	single-use cups, lids & straws	six-pack rings	lids	take-out containers
GLASS								What's Accepted Somewhere Else (but not in your recycling cart) 		
	green glass empty and rinsed, no corks or caps	brown glass empty and rinsed, no corks or caps	glass jars empty and rinsed, no lids	baby food jars empty and rinsed, no lids	glass bottles empty and rinsed, no lids	windows & mirrors	glassware			
METAL										
	aluminum cans empty and rinsed, do not crush	metal food cans empty and rinsed, place lid in can	tuna cans empty and rinsed, place lid in can	pet food cans empty and rinsed, place lid in can	aluminum pans & foil clean, ball up foil	soiled aluminum foil	pots			
	How to Prepare Recycling for Collection Do not bag recyclables. Items should be placed loose in the cart. - empty and rinse containers if needed (no liquid or food should be in the container) - screw the caps back on plastic bottles - break down cardboard boxes to optimize space - remove any plastic film from recyclable materials					 Waste Wizard				

4 | wakeforestnc.gov, search "waste wizard"

wakeforestnc.gov, search "waste wizard" | 5

Figure 3- TOWF Solid Waste/Recycling Guide



Figure 4- Our Town Publication, Front Page

Recycling reminders

- Do not overfill recycling carts with cardboard.** Tightly packed carts cannot be dumped because items get stuck in the cart. Likewise, any loose, overflowing items can fall out and cause litter.

Help keep Wake Forest roadways clean by securing any trash in your truck bed. When you throw trash in the back of your truck, it inevitably blows out and becomes litter on the roadside.



Recycling incorrect items is costly and can make the entire lot of materials unusable

While it feels good to reduce landfill volume and help the environment, attempting to recycle the wrong things—or wishing they could be recycled—can actually negate recycling efforts. It's less important to fill the bin with a mix of things we *think* may be recyclable as it is to put in things we *know* are recyclable.

You are the first step to successful recycling that is cost-effective and environmentally-beneficial process. Thank you for caring and doing your part.

🌐 wakeforestnc.gov, search "recycling",
☎ 919-435-9570, ✉ publicworksdept@wakeforestnc.gov



These items should never go in your recycling cart

- 1 Plastic bags or bagged recycling
- 2 To-go boxes (clamshells) or to-go cups
- 3 Food contaminants (food or drink left in recyclables, dirty pizza boxes)
- 4 Styrofoam (#6 plastics are not accepted)
- 5 Plastic cups, Solo® cups & straws



388



Figure 6- Truck Wrap Sample (would be “Recycle Right” message)



Figure 7- Recycle guide stickers that have been placed on resident’s carts and on carts for newly constructed homes



Figure 8- Small 48-gallon, black lid recycling cart upgraded to large, 96-gallon blue lid recycling cart

Figure 9 – Figure 26

Republic Invoices from 7/1/2020 to 12/31/2021 depicting recycling contamination disposal costs and tonnage totals for recycling

 REPUBLIC Services PO Box 12018, Research Triangle Park NC 27709 919.433.0905 Phone 919.941.2841 Fax								
		INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS		
		7/31/2020	0939-001592760	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST RESIDENTIAL SERVICE WAKE FOREST, NC 27587		
		FOR PERIOD: JULY						
DATE	DESCRIPTION			QTY	RATE	TOTAL		
7/31/20	WEEKLY RESIDENTIAL TRASH SERVICE			14409	10.79	\$155,473.11		
7/31/20	WEEKLY RESIDENTIAL RECYCLE SERVICE			14355	3.51	\$50,386.05		
7/31/20	WEEKLY RESIDENTIAL BULK WASTE PICKUP			158	0.00	\$0.00		
6/30/20	JUNE 2020 RECYCLING DISPOSAL					\$17,529.69		
	MSW Tons - 1130.37							
	RECY Tons - 293.58							
	BULK Tons - 19.86							
ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances				TOTAL THIS INVOICE		\$223,388.85		
CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS	PLEASE PAY THIS AMOUNT		\$223,388.85		
223388.85	0.00	0.00	0.00					
				DUE UPON RECEIPT				
Republic Services - Raleigh P.O. Box 12018 Research Triangle Park, NC 27709								
				For accurate and timely application return your remittance advice with your payment.				
		ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE		
		3-0939-9939002	7/31/2020		223388.85	\$223,388.85		
				REMIT PAYMENT TO:				
TOWN OF WAKE FOREST RESIDENTIAL SERVICE WAKE FOREST, NC 27587				REPUBLIC SERVICES - RALEIGH PO BOX 12018 RESEARCH TRIANGLE PARK, NC 27709				

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PAGE 1 OF 1

INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
8/31/2020	0939-001602446	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
FOR PERIOD:				RESIDENTIAL SERVICE
AUGUST				WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
8/31/20	WEEKLY RESIDENTIAL TRASH SERVICE	14421	10.79	\$155,602.59
8/31/20	WEEKLY RESIDENTIAL RECYCLE SERVICE	14360	3.51	\$50,403.60
8/31/20	WEEKLY RESIDENTIAL BULK WASTE PICKUP	199	0.00	\$0.00
8/31/20	JULY 2020 RECYCLING DISPOSAL			\$20,357.02

MSW Tons - 1092.17

RECY Tons - 267.18

BULK Tons - 15.95

100.580.5471 - \$155,602.59

100.580.5472 \$79,760.62

Allison Snyder

9/15/20

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
226363.21	0.00	0.00	0.00

TOTAL THIS INVOICE	\$226,363.21
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PLEASE PAY THIS AMOUNT	\$226,363.21
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DUE UPON RECEIPT

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ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	8/31/2020		226363.21	\$226,363.21

TOWN OF WAKE FOREST
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 WAKE FOREST, NC 27587

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INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
9/30/2020	0939-001611860	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD: SEPTEMBER 2020	RESIDENTIAL SERVICE WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
9/30/20	WEEKLY RESIDENTIAL TRASH SERVICE	14462	10.79	\$156,044.98
9/30/20	WEEKLY RESIDENTIAL RECYCLE SERVICE	14401	3.51	\$50,547.51
9/30/20	WEEKLY RESIDENTIAL BULK WASTE PICKUP	182	0.00	\$0.00
8/31/20	AUGUST 2020 RECYCLING DISPOSAL			\$17,843.86
	MSW Tons - 1076.50			
	RECY Tons - 299.01			
	BULK Tons - 17.27			

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
224436.35	0.00	0.00	0.00

TOTAL THIS INVOICE	\$224,436.35
PLEASE PAY THIS AMOUNT	\$224,436.35
DUE UPON RECEIPT	

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ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	9/30/2020		224436.35	\$224,436.35

TOWN OF WAKE FOREST
RESIDENTIAL SERVICE
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BULK Tons - 12.48



VOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
11/30/2020	0939-001630399	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD:	RESIDENTIAL SERVICE
			NOVEMBER 2020	WAKE FOREST, NC 27587

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances				TOTAL THIS INVOICE	\$243,189.39
CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS	PLEASE PAY THIS AMOUNT	\$243,189.39
243189.39	0.00	0.00	0.00	DUE UPON RECEIPT	

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OWN OF WAKE FOREST RESIDENTIAL SERVICE WAKE FOREST, NC 27587	REMIT PAYMENT TO: REPUBLIC SERVICES - RALEIGH PO BOX 12018 RESEARCH TRIANGLE PARK, NC 27709
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INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
12/31/2020	0939-001640035	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST RESIDENTIAL SERVICE WAKE FOREST, NC 27587
FOR PERIOD: DECEMBER 2020				

DATE	DESCRIPTION	QTY	RATE	TOTAL
12/31/20	WEEKLY RESIDENTIAL TRASH SERVICE	14413	11.42	\$164,596.46
12/31/20	WEEKLY RESIDENTIAL RECYCLE SERVICE	14290	4.16	\$59,446.40
12/31/20	WEEKLY RESIDENTIAL BULK WASTE PICKUP	0	0.00	\$0.00
11/30/20	NOV 2020 COMMINGLE RECYCLING DISPOSAL			\$18,375.26
MSW Tons - 1200.26				
RECY Tons - 333.16				
BULK Tons - 17.43				
100 · 580 · 5471 — \$164596 ⁴⁶ 100 · 580 · 5472 — \$59446 ⁴⁰				
Katherine A. Tharion 8 Jan 21 O.K. per Magda Jeanette Johnson				

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
242418.12	0.00	0.00	0.00

TOTAL THIS INVOICE	\$242,418.12
PLEASE PAY THIS AMOUNT	\$242,418.12
DUE UPON RECEIPT	

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ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	12/31/2020		242418.12	\$242,418.12

TOWN OF WAKE FOREST
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INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
1/31/2021	0939-001649113	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD: JANUARY 2021	RESIDENTIAL SERVICE
				WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
1/31/21	WEEKLY RESIDENTIAL TRASH SERVICE	14456	11.42	\$165,087.52
1/31/21	WEEKLY RESIDENTIAL RECYCLE SERVICE	14319	4.16	\$59,567.04
	WEEKLY RESIDENTIAL BULK WASTE PICKUP	0	0.00	\$0.00
12/31/20	DEC 2020 COMMINGLE RECYCLING DISPOSAL			\$17,135.91
	MSW Tons - 1036.46			
	RECY Tons - 300.03			
	BULK Tons - 19.27			

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
241790.47	0.00	0.00	0.00

TOTAL THIS INVOICE	\$241,790.47
PLEASE PAY THIS AMOUNT	\$241,790.47
DUE UPON RECEIPT	

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ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	1/31/2021		241790.47	\$241,790.47

TOWN OF WAKE FOREST
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INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
2/28/2021	0939-001658213	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD: FEBRUARY 2021	RESIDENTIAL SERVICE WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
2/28/21	WEEKLY RESIDENTIAL TRASH SERVICE	14491	11.42	\$165,487.22
2/28/21	WEEKLY RESIDENTIAL RECYCLE SERVICE	14359	4.16	\$59,733.44
	WEEKLY RESIDENTIAL BULK WASTE PICKUP	0	0.00	\$0.00
1/31/21	JAN 2021 COMMINGLE RECYCLING DISPOSAL			\$14,119.42
	MSW Tons - 921.42			
	RECY Tons - 260.57			
	BULK Tons - 18.71			
	Received 3/4/2021			
	100.580.5471 - \$165,487.22			
	100.580.5472 - \$73,852.86			
	Signed 3/5/2021			
	<i>Jeanette Johnson</i>			

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
239340.08	0.00	0.00	0.00

TOTAL THIS INVOICE	\$239,340.08
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PLEASE PAY THIS AMOUNT	\$239,340.08
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DUE UPON RECEIPT

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ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	2/28/2021		239340.08	\$239,340.08

TOWN OF WAKE FOREST
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INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
3/31/2021	0939-001667341	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD: MARCH 2021	RESIDENTIAL SERVICE WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
3/31/21	WEEKLY RESIDENTIAL TRASH SERVICE	14526	11.42	\$165,886.92
3/31/21	WEEKLY RESIDENTIAL RECYCLE SERVICE	14392	4.16	\$59,870.72
	WEEKLY RESIDENTIAL BULK WASTE PICKUP	0	0.00	\$0.00
2/28/21	FEB 2021 COMMINGLE RECYCLING DISPOSAL			\$12,173.60
	MSW Tons - 1086.89			
	RECY Tons - 317.84			
	BULK Tons - 23.89			
	Recieved 4/6/2021			
	100.580.5471- \$165,886.92			
	100.580.5472- \$72,044.32			

Signed 4/13/2021

*Jeanette Johnson***ACCOUNT STATUS** Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
237931.24	0.00	0.00	0.00

TOTAL THIS INVOICE	\$237,931.24
PLEASE PAY THIS AMOUNT	\$237,931.24
DUE UPON RECEIPT	

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ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	3/31/2021		237931.24	\$237,931.24

TOWN OF WAKE FOREST
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 WAKE FOREST, NC 27587

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INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
4/30/2021	0939-001676670	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD: APRIL 2021	RESIDENTIAL SERVICE WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
4/30/21	WEEKLY RESIDENTIAL TRASH SERVICE	14593	11.42	\$166,652.06
4/30/21	WEEKLY RESIDENTIAL RECYCLE SERVICE	14452	4.16	\$60,120.32
	WEEKLY RESIDENTIAL BULK WASTE PICKUP	0	0.00	\$0.00
4/30/21	MAR 2021 COMMINGLE RECYCLING DISPOSAL			\$12,876.52
	MSW Tons - 1110.17			
	RECY Tons - 301.91			
	BULK Tons - 17.12			
	Recieved 5/6/2021 100.580.5471- \$166,652.06 100.580.5472- \$72,996.84			
	Signed 5/7/2021 <i>Jeanette Johnson</i>			

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
239648.90	0.00	0.00	0.00

TOTAL THIS INVOICE	\$239,648.90
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PLEASE PAY THIS AMOUNT	\$239,648.90
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DUE UPON RECEIPT

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ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	4/30/2021		239648.90	\$239,648.90

TOWN OF WAKE FOREST
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INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
5/31/2021	0939-001685886	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD: MAY 2021	RESIDENTIAL SERVICE WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
5/31/21	WEEKLY RESIDENTIAL TRASH SERVICE	14644	11.42	\$167,234.48
5/31/21	WEEKLY RESIDENTIAL RECYCLE SERVICE	14504	4.16	\$60,336.64
	WEEKLY RESIDENTIAL BULK WASTE PICKUP	0	0.00	\$0.00
4/30/21	APR 2021 COMMINGLE RECYCLING DISPOSAL			\$11,767.02
	MSW Tons - 993.20			
	RECY Tons - 287.05			
	BULK Tons - 21.51			
				Recieved 6/4/2021
				Invoice # - 0939-001685886
				May 2021
				100.580.5471- \$167,234.48
				100.580.5472- \$72,103.66
				<i>Jeanette Johnson</i> Signed 6/4/2021

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
239338.14	0.00	0.00	0.00

TOTAL THIS

INVOICE \$239,338.14

PLEASE PAY THIS

AMOUNT \$239,338.14

DUE UPON RECEIPT

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ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	5/31/2021		239338.14	\$239,338.14

TOWN OF WAKE FOREST
 RESIDENTIAL SERVICE
 WAKE FOREST, NC 27587

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INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
6/30/2021	0939-001695097	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD: JUNE 2021	RESIDENTIAL SERVICE WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
6/30/21	WEEKLY RESIDENTIAL TRASH SERVICE	14715	11.42	\$168,045.30
6/30/21	WEEKLY RESIDENTIAL RECYCLE SERVICE	14574	4.16	\$60,627.84
	WEEKLY RESIDENTIAL BULK WASTE PICKUP	0	0.00	\$0.00
5/31/21	MAY 2021 COMMINGLE RECYCLING DISPOSAL			\$10,432.67
MSW Tons - 1174.60				
RECY Tons - 345.66				
BULK Tons - 22.76				
June 2021				
100.580.5471- \$168,045.30				
100.580.5472- \$71,060.51				
Recieved- 7/7/2021				
 Signed 7/9/2021				

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
239105.81	0.00	0.00	0.00

TOTAL THIS INVOICE	\$239,105.81
PLEASE PAY THIS AMOUNT	\$239,105.81
DUE UPON RECEIPT	

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ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	6/30/2021		239105.81	\$239,105.81

TOWN OF WAKE FOREST
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INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
7/31/2021	0939-001704643	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD:	RESIDENTIAL SERVICE
			JULY 2021	WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
7/31/21	WEEKLY RESIDENTIAL TRASH SERVICE	14770	11.42	\$168,673.40
7/31/21	WEEKLY RESIDENTIAL RECYCLE SERVICE	14623	4.16	\$60,831.68
	WEEKLY RESIDENTIAL BULK WASTE PICKUP	0	0.00	\$0.00

MSW Tons - 1096.71

RECY Tons - 308.73

BULK Tons - 12.98

Rec'd 10/4/21 Vendor #1442

Paid \$223,388.85 on 8.11.21

Balance due of **\$6,116.23**

* Note: A July 2020 invoice was sent over by Republic for July 2021 to pay.

The date of the invoice was inadvertently missed by PW and AP.

This is the correct invoice for July 2021 with the balance due indicated above.

Jeanette Johnson

Signed 10/6/2021

CORRECTION 10/15/2021 Overall-

100.580.5471- \$168,673.40

100.580.5472- \$60,831.68

Incorrect Invoice was provided by vendor originally-

Remaining balance left for MSW is \$13,200.29 (of the \$168,673.40)

Overage (due to market shifts) for Recycling is \$7,084.06 (of the \$60,831.68)

Leaving a total balance of **\$6,116.23** from account 100.580.5471 owed to Republic to correct the due balance on the July 2021 Invoice**ACCOUNT STATUS** Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
229505.08	0.00	0.00	0.00

TOTAL THIS

INVOICE

\$229,505.08

PLEASE PAY THIS

AMOUNT

\$229,505.08

DUE UPON RECEIPT

Republic Services - Raleigh
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ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	7/31/2021		229505.08	\$229,505.08

TOWN OF WAKE FOREST
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 WAKE FOREST, NC 27587

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INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
8/31/2021	0939-001714231	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD: AUGUST 2021	RESIDENTIAL SERVICE WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
8/31/21	WEEKLY RESIDENTIAL TRASH SERVICE	14,802.00	11.42	\$169,038.84
8/31/21	WEEKLY RESIDENTIAL RECYCLE SERVICE	14,653.00	4.16	\$60,956.48
	WEEKLY RESIDENTIAL BULK WASTE PICKUP	-	0.00	\$0.00
7/31/21	COMINGLED RECYCLING DISPOSAL			\$121.68
	MSW Tons - 1085.13			
	RECY Tons - 274.08			
	BULK Tons - 12.68			
	10/15/2021 CORRECTION: 			
	100.580.5471- \$169,038.84			
	100.580.5472- \$61,078.16			
	Received 9/24/2021			
	100.580.5470- \$169,038.84			
	100.580.5471- \$61,078.16			

Jeanette Johnson
 Signed 10/6/2021

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
\$230,117.00	0.00	0.00	0.00

TOTAL THIS

INVOICE

\$230,117.00

PLEASE PAY THIS

AMOUNT

\$230,117.00

DUE UPON RECEIPT

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ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	8/31/2021		\$230,117.00	\$230,117.00

TOWN OF WAKE FOREST
 RESIDENTIAL SERVICE
 WAKE FOREST, NC 27587

REMIT PAYMENT TO:

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 DURHAM, NC 27703

**REPUBLIC Services**

PO Box 12018, Research Triangle Park NC 27709
 919.433.0905 Phone
 919.941.2841 Fax

PAGE 1 OF 1

INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
9/30/2021	0939-001723936	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD:	RESIDENTIAL SERVICE
			SEPTEMBER 2021	WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
9/30/21	WEEKLY RESIDENTIAL TRASH SERVICE	14,861.00	11.42	\$169,712.62
9/30/21	WEEKLY RESIDENTIAL RECYCLE SERVICE	14,708.00	4.16	\$61,185.28
	WEEKLY RESIDENTIAL BULK WASTE PICKUP	-	0.00	\$0.00
	MSW Tons - 1063.38			
	RECY Tons - 284.07			
	BULK Tons - 15.53			
	Recieved 10/6/2021			
	100.580.5471- \$169,712.62			
	100.580.5471- \$61,185.28			
	10/15/2021 CORRECTION			
	100.580.5471- \$169,712.62			
	100.580.5472- \$61,185.28			

Jeanette Johnson
 Signed 10/6/2021

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
\$230,897.90	0.00	0.00	0.00

TOTAL THIS INVOICE \$230,897.90

PLEASE PAY THIS AMOUNT \$230,897.90

DUE UPON RECEIPT

Republic Services - Raleigh
 P.O. Box 12018
 Research Triangle Park, NC 27709

For accurate and timely application return your remittance advice with your payment.

ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	9/30/2021		\$230,897.90	\$230,897.90

TOWN OF WAKE FOREST
 RESIDENTIAL SERVICE
 WAKE FOREST, NC 27587

REMIT PAYMENT TO:
 REPUBLIC SERVICES - RALEIGH
 5111 CHIN PAGE ROAD
 DURHAM, NC 27703

**REPUBLIC Services**

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PAGE 1 OF 1

INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
10/31/2021	0939-001733952	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD: OCTOBER 2021	RESIDENTIAL SERVICE WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
10/31/21	WEEKLY RESIDENTIAL TRASH SERVICE	14,967.00	11.42	\$170,923.14
10/31/21	WEEKLY RESIDENTIAL RECYCLE SERVICE	14,807.00	4.16	\$61,597.12
	WEEKLY RESIDENTIAL BULK WASTE PICKUP	-	0.00	\$0.00
	MSW Tons - 969.62			
	RECY Tons - 274.11			
	BULK Tons - 11.99			

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
\$232,520.26	0.00	0.00	0.00

TOTAL THIS INVOICE	\$232,520.26
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PLEASE PAY THIS AMOUNT	\$232,520.26
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DUE UPON RECEIPT

Republic Services - Raleigh
 P.O. Box 12018
 Research Triangle Park, NC 27709

**For accurate and timely application return your
 remittance advice with your payment.**

ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	10/31/2021		\$232,520.26	\$232,520.26

TOWN OF WAKE FOREST
 RESIDENTIAL SERVICE
 WAKE FOREST, NC 27587

REMIT PAYMENT TO:
 REPUBLIC SERVICES - RALEIGH
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**REPUBLIC Services**

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PAGE 1 OF 1

INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
11/30/2021	0939-001743659	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD: NOVEMBER 2021	RESIDENTIAL SERVICE WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
11/30/21	WEEKLY RESIDENTIAL TRASH SERVICE	15,010.00	11.80	\$177,118.00
11/30/21	WEEKLY RESIDENTIAL RECYCLE SERVICE	14,848.00	4.30	\$63,846.40
	WEEKLY RESIDENTIAL BULK WASTE PICKUP	-	0.00	\$0.00
	MSW Tons - 1101.15			
	RECY Tons - 282.75			
	BULK Tons - 11.53			
November 2021 Invoice Received 12/13/2021 100.580.5471- \$177,118.00 100.580.5472- \$63,846.40 <i>Jeanette Johnson</i> Signed 12/13/2021				

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
\$240,964.40	0.00	0.00	0.00

TOTAL THIS INVOICE	\$240,964.40
PLEASE PAY THIS AMOUNT	\$240,964.40
DUE UPON RECEIPT	

Republic Services - Raleigh
 P.O. Box 12018
 Research Triangle Park, NC 27709

For accurate and timely application return your
 remittance advice with your payment.

ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	11/30/2021		\$240,964.40	\$240,964.40

TOWN OF WAKE FOREST
 RESIDENTIAL SERVICE
 WAKE FOREST, NC 27587

REMIT PAYMENT TO:
 REPUBLIC SERVICES - RALEIGH
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 DURHAM, NC 27703

**REPUBLIC Services**

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PAGE 1 OF 1

INVOICE DATE	INVOICE NO.	ACCOUNT NO.	FOR BILLING INQUIRIES, CALL	SERVICE ADDRESS
12/31/2021	0939-001753578	3-0939-9939002	(919) 433-0905	TOWN OF WAKE FOREST
			FOR PERIOD: DECEMBER 2021	RESIDENTIAL SERVICE WAKE FOREST, NC 27587

DATE	DESCRIPTION	QTY	RATE	TOTAL
12/31/21	WEEKLY RESIDENTIAL TRASH SERVICE	15,680.00	11.80	\$185,024.00
12/31/21	WEEKLY RESIDENTIAL RECYCLE SERVICE	15,591.00	4.30	\$67,041.30
	WEEKLY RESIDENTIAL BULK WASTE PICKUP	-	0.00	\$0.00
	MSW Tons - 1143.34			
	RECY Tons - 351.14			
	BULK Tons - 9.59			
	100.580.5471- \$185,024.00			
	100.580.5472- \$67,041.30			
	Rec'd 1/10/2022			
	December 2021			

Jeanette Johnson
 Signed 1/11/2022

ACCOUNT STATUS Finance charge of 1.5% assessed on past due balances

CURRENT	31-60 DAYS	61-90 DAYS	OVER 90 DAYS
\$252,065.30	0.00	0.00	0.00

TOTAL THIS INVOICE \$252,065.30

PLEASE PAY THIS AMOUNT \$252,065.30

DUE UPON RECEIPT

Republic Services - Raleigh
 P.O. Box 12018
 Research Triangle Park, NC 27709

For accurate and timely application return your remittance advice with your payment.

ACCOUNT NO.	INVOICE DATE	INVOICE NO.	CURRENT CHARGES	TOTAL DUE
3-0939-9939002	12/31/2021		\$252,065.30	\$252,065.30

TOWN OF WAKE FOREST
 RESIDENTIAL SERVICE
 WAKE FOREST, NC 27587

REMIT PAYMENT TO:
 REPUBLIC SERVICES - RALEIGH
 5111 CHIN PAGE ROAD
 DURHAM, NC 27703

2022 Community Waste Reduction and Recycling Grant Program

REQUEST FOR PROPOSALS

N.C. Department of Environmental Quality
Division of Environmental Assistance and Customer Service

The purpose of this grant program is to assist local governments with the implementation, expansion, and improvement of waste reduction and recycling programs in North Carolina. The Division of Environmental Assistance and Customer Service (DEACS) administers the Community Waste Reduction and Recycling Grant program through the Solid Waste Management Outreach Program.

With the release of this Request for Proposals (RFP), DEACS is seeking proposals that request grant funding to help initiate or expand public waste reduction programs within the state. **Applicants should carefully read this entire RFP prior to submitting a proposal. Proposals must be received by DEACS by 5:00 p.m. on Thursday, February 17, 2022.** Please address any questions about this grant program to Sandy Skolochenko at (919) 707-8147, sandy.skolochenko@ncdenr.gov.

Community Waste Reduction and Recycling Grant Program Parameters:

The 2022 Community Waste Reduction and Recycling (CWRAR) Grant Program seeks to fund projects that help communities build lasting capacity to divert materials from the waste stream and / or that increase public awareness of waste reduction and recycling. There are two categories of CWRAR Grants for 2022: Priority Project Grants and Standard Project Grants. Different levels of grant funding are available for each project category.

Available Funding:

- Priority Project: Applicants are eligible for a Priority Project grant award of up to **\$40,000**.
- Standard Project: Applicants are eligible for a Standard Project grant award of up to **\$30,000**.

Priority Project Grants:

Priority Project Grants support investments in public recycling program areas that have been determined by the state recycling program to be of particular importance to growing and expanding efficient and effective waste reduction and recycling services throughout North Carolina.

2022 CWRAR priorities include:

- Projects that fund outreach enforcement efforts (e.g., tagging program) to reduce contamination in the recycling stream and improve material quality. If seeking funding for educational enforcement efforts, please see additional provisions in the Special Requirements section.
- Projects that divert food waste from landfill disposal by implementing or expanding collection, management, and recycling of food waste from residential or commercial sources.
- Projects that establish or expand glass recycling collection. To qualify as a Priority Project, the community must collect glass to be recycled by a downstream glass recycling processor, not to be sent for end-use applications such as aggregate or daily cover.
- Projects that implement new permanent Household Hazardous Waste (HHW) programs or that expand existing permanent HHW programs. To qualify as a Priority Project, a newly established permanent HHW program must be open to collect HHW from the public at least four (4) separate days during any given fiscal year and an existing HHW program must significantly increase the number of days or hours of operation so that citizens have improved access to HHW services.

Standard Project Grants:

Standard Project Grants include any projects that increase and / or enhance public waste reduction and recycling but fall outside of the 2022 priorities. Standard Projects may include but are not limited to:

- Projects that significantly increase a community's overall diversion of materials from the solid waste stream.
- Projects that improve recycling program efficiency and/or cost effectiveness.
- Projects that implement new or expand existing curbside recycling programs or that help transition a curbside recycling program from collection using bins or blue-bags to a cart-based collection system.
- Projects that increase the diversion of materials that are banned from disposal in North Carolina.
- Projects that implement recycling programs for special wastes such as fluorescent bulbs, used motor oil or filters, used cooking oil, antifreeze, pesticide containers, batteries or latex paint.
- Projects that implement or expand construction and demolition recycling efforts to divert materials such as concrete, unpainted/untreated wood, asphalt (from roads and shingles), gypsum, metals, brick, glass, plastics, carpet, or salvaged building materials from landfill disposal.
- Projects that implement education and outreach to reduce contamination in the recycling stream and improve material quality. If seeking funding for recycling education, please see additional provisions in the Special Requirements section.
- Projects that implement or expand public school recycling programs. If seeking funding for public school recycling, please see additional provisions in the Special Requirements section.
- Projects that increase the efficiency or effectiveness of public electronics recycling programs. If seeking funding for electronics recycling, please see additional provisions in the Special Requirements section.
- Projects that create or expand away-from-home recycling opportunities such as recycling infrastructure for parks, sports fields, streetscape / pedestrian recycling, and / or recycling at public venues. If seeking funding for away-from-home recycling, please see additional provisions in the Special Requirements section.

Communities preparing proposals for a 2022 CWRAR Grant are strongly encouraged to contact Sandy Skolochenko at (919) 707-8147, sandy.skolochenko@ncdenr.gov or Mel Gilles (for education and outreach projects) at (919) 707-8127, mel.gilles@ncdenr.gov. These staff are available to discuss potential grant projects and provide technical assistance and advice prior to submitting a grant proposal.

Cash Match Requirement:

Required Cash Match: CWRAR grant winners must provide a cash match equal to or exceeding 20 percent of the requested grant funding. For example, a grantee requesting a \$20,000 grant must match at least \$4,000 with local funds for a total project cost of \$24,000.

Calculating Cash Match: To determine the necessary cash match for any grant project, first determine the total budget associated with the project and then use the following equation: $\text{total project budget} \div 6 = \text{required cash match}$.

Distributions from the \$2 per ton Solid Waste Disposal Tax may be used to cover cash match requirements. In-kind contributions will not be accepted in lieu of cash match.

Grant Project Planning:

Available funding is limited, and it is anticipated that the 2022 CWRAR Grant Round will be highly competitive. For this reason, it is important that projects seeking grant funding be well thought out and well planned, and that applicants follow the instructions in this RFP when preparing proposals by providing all information as outlined in the Required Proposal Format section. Proposals that seek grant funds for the replacement of existing equipment will be scored substantially lower than projects that implement new recycling services or projects that expand existing recycling services.

Use of Grant Funds:

Examples of **approved uses** of CWRAR Grant funds include site development costs, construction of facilities to handle recyclable materials, equipment purchases, equipment installation costs, key recycling program components, public awareness programs and materials that support public education such as signs or brochures.

Grant funds **MAY NOT** be used for employee salaries, land acquisition costs, administrative expenses such as overhead, utility costs, studies or work performed by consultants, contracted collection costs, and / or payment for other contracted recycling services such as payment to a vendor for operating a household hazardous waste collection event.

If you have questions about eligible uses of grant funds, please contact Sandy Skolochenko at (919)-707-8147 or sandy.skolochenko@ncdenr.gov for more information.

Eligible Entities:

- Local governments, defined as counties, municipalities, councils of governments and solid waste authorities in North Carolina, are eligible to apply for funding from the CWRAR Grant Program.
- Former CWRAR grantees are eligible to apply. Applicants with an **open 2021 CWRAR Grant contract** must have invoiced for 90% of eligible grant funds by the proposal due date (February 17, 2022). Proposals **will not** be accepted from applicants with an open CWRAR Grant from cycles prior to 2021. Applicants with open grants from other programs (e.g., Abandoned Manufactured Home Grants) are eligible to apply.
- Federal and state agencies **are not eligible** for funding through this grant program.
- Public universities, community colleges and private colleges and universities **are not eligible** for funding through this grant program.
- Not-for-profit entities **are not eligible** for funding through this grant program; however, these entities are eligible for funding through the Recycling Business Development Grant Round. Contact Sandy Skolochenko at (919) 707-8147 or sandy.skolochenko@ncdenr.gov for more information.
- Public school systems and individual public schools **are not eligible** to apply directly for funding through this grant program. **However**, local governments (counties or municipalities) may apply for funding to support public school recycling projects - see Special Requirements section below.

Conditions on Submittals:

- **ONLY ONE PROPOSAL PER ELIGIBLE ENTITY WILL BE ACCEPTED.** Grant proposals may combine funding requests for multiple types of projects into one proposal. The available funding limits still apply, and total request may not exceed the grant award amounts noted in the Available Funding section.
- Multi-party initiatives such as joint projects involving two or more local governments where each local government contributes towards project funding are strongly encouraged. Any group participating in a regional or multi-party project proposal may not submit additional proposals.
- Applications will not be accepted from local governments that have not submitted the required Solid Waste and Materials Management Annual Report for the most recent fiscal year.

General Requirements:

General requirements for **all applicants**:

- Usage of N.C. Solid Waste Disposal Tax proceeds: Solid Waste Disposal Tax proceeds are distributed to eligible local governments on a quarterly basis by the Department of Revenue. According to G.S. § 105-187.63, these funds must be used by a city or county solely for solid waste management programs and services. CWRAR Grant applicants must certify in writing that all disposal tax proceeds are used only for the purpose of providing solid waste and recycling services.

In addition to this written certification, applicants should describe how disposal tax funds are utilized and whether proceeds will be used to supply matching funds.

- **Public Building Recycling Services:** CWRAR Grants will not be awarded to applicants that do not have recycling services for cans, bottles and paper available at their government buildings. As part of the grant proposal, all applicants must indicate that employees in the key government buildings operated by the applicant have reasonable access to recycling services and are able and encouraged to recycle materials generated in the course of government business. Please include a list of the materials collected for recycling at these facilities.
- **Mercury Product Recycling:** G.S. § 130A-310.60 requires that any public agency using state funds for the construction or operation of public buildings shall establish a program for the collection and recycling of all spent fluorescent lights and thermostats that contain mercury generated in public buildings. As part of the grant proposal, all applicants must indicate that they have a program in place for the collection of fluorescent lights and mercury thermostats from their public buildings. If the applicant does not have a program in place for the collection of these materials, then as a precondition of any grant award the applicant must initiate such services. For more information about these requirements and / or for assistance implementing a mercury products recycling program please contact Sandy Skolochenko at 919-707-8147, sandy.skolochenko@ncdenr.gov

Special Requirements:

Applicants seeking funding for recycling education, public school recycling, away-from-home recycling and/or electronics recycling **MUST** address the following Special Requirement(s) in their submitted proposal.

- **Special Requirements for Recycling Education/Enforcement Projects:** Applicants should contact Mel Gilles at (919) 707-8127, mel.gilles@ncdenr.gov or Sandy Skolochenko at (919) 707-8147, sandy.skolochenko@ncdenr.gov, to discuss a project before applying.
 1. Provide a list of the recyclable materials accepted by the program and indicate how the materials are to be collected (single stream, dual stream, source separated). If the grant application is for regional outreach materials, all local governments or entities participating must agree on a common list of materials for recycling and provide that common accepted list with the grant application.
 2. If the grant application is for regional outreach materials, a letter of agreement and support must be provided by each local government or entity participating in the proposed grant project. Each participating entity should establish and provide a designated recycling contact for project coordination.
 3. Identify the primary message of the outreach effort.
 4. Indicate whether you will be using your own design or if you will be using DEACS customizable design services. <https://deq.nc.gov/conservation/recycling/general-recycling-information/customized-outreach-materials>
 5. Supply mock-ups or example graphics for the outreach materials, enforcement tags, or ads. Are your materials dependent on words or images?
 6. If the grant is awarded:
 - Discuss the material design with your assigned DEACS grant manager as soon as possible to ensure clear communication about the project content and timing.
 - Documents must be submitted for review prior to printing or execution. Reviews may take up to two weeks, so plan accordingly and submit well in advance of printing (not days before going to print). It is often helpful to submit an initial draft for early feedback.
 - Post your community's accepted recyclables list online.
 - Program changes can affect the grant and messaging. Inform DEACS immediately if program changes occur to determine if a contract amendment is needed.

- **Special Requirements for Public School Recycling Projects:** Local governments may apply for funding to support public school recycling projects, but **must** provide the supplemental information outlined below to ensure that all necessary school recycling program elements are addressed and to help demonstrate project planning. This is a competitive grant program and projects that institute or expand a system-wide school recycling program will compete better than projects that only serve an individual school. Eligible grant projects may seek funding for equipment (such as bins and roll carts) and/or education materials. As with other CWRAR projects, administrative expenses, staff salaries and contract collection costs are not eligible for grant funding nor can they be used as matching funds. If a public school system will be contributing funds towards the implementation of a recycling grant project, these funds should be paid to the state grantee in order to ensure that the state grantee makes the purchases associated with the grant project. All purchases associated with a grant project must be made by the grantee. Purchases made directly by a public school system shall not be eligible for reimbursement. Please contact Mel Gilles at 919-707-8127, mel.gilles@ncdenr.gov or Sandy Skolochenko at 919-707-8147, sandy.skolochenko@ncdenr.gov for information or assistance with public school recycling projects.

School Recycling Supplemental Requirements:

1. Describe the existing school recycling program (if any) that is available in the school system associated with the grant project. The description should include the following items:
 - Indicate whether recycling service is available to *all* schools within the district or only to certain schools within the district.
 - If recycling collection presently exists or if this project implements a new school recycling service, then please indicate the recycling service provider (e.g. indicate whether the collection of recyclables is provided by public school system employees, by a specific local government, or through a contracted or third-party service provider).
 - Provide a list of the recyclable materials accepted by the program and indicate how the materials are to be collected (single stream, dual stream, source separated).
 - Indicate where the recyclables are going after they are collected (provide the name of the materials processor).
2. List all of the public agencies and/or departments that collaborate to assist with or operate the school recycling program and list the role of each entity. Examples could include the local educational authority (school district), municipal and/or county solid waste management departments. Ideally, a holistic school system recycling program should include cooperation between the community's public recycling program and the public school system.
3. If a system-wide school recycling program is in place, explain if and how this grant will expand recycling throughout the school system and note whether this grant project is part of a phased plan.
4. A designated recycling contact should be established for each school facility participating in the recycling program. Examples of designated contacts might include school facility manager, head custodian, the faculty coordinator or leader of a group or club, the principal, or school administrator. Please provide a list of schools to be served by this project and the designated recycling contact for each school including the name and title of the designated contact.
5. Indicate the locations where recycling containers are or will be placed at the school facilities (e.g. classrooms, cafeterias, hallways, athletic fields, administrative offices, library, copy rooms, etc.).
6. Indicate who will be responsible for emptying the recycling containers (e.g. custodian / cleaning staff, teachers, students, student groups, etc.).
7. Provide a plan for promoting recycling within the schools impacted by the grant project as well as a plan for educating staff and students about the program.

- **Electronics Recycling Projects:** Any community seeking grant funds related to an electronics recycling related project must indicate in their proposal whether the local government has ever received funds distributed from the State's Electronics Management Program. For more information on eligibility for Electronics Management Program Funds see this web site: <http://deq.nc.gov/about/divisions/waste-management/solid-waste-section/electronics-management/nc-local-governments-info-page>. If the local government has received Electronics Management Fund distributions in the past, then the applicant must include information in its proposal about how those funds have been used and how the community intends to use the funds that will be distributed in February 2022 and February 2023.

Successful **county** applicants seeking grant funds to support an electronics recycling related project that **have not** previously been eligible for distributions from the State's Electronics Management Program will be required to become eligible for Electronics Management Funds on or before December 31, 2022 as a precondition of receipt of CWRAR Grant funds.

Successful **municipal** applicants seeking grant funds to support an electronics recycling related project that **have not** previously been eligible for distributions from the State's Electronics Management Program must decide whether or not to make themselves eligible for Electronics Management Funds prior to the December 31, 2022 eligibility deadline. This decision should be made in consultation with the county where the municipality is located and should be based on how the distribution of funds can best serve the advancement of electronics recycling within the community. If it is determined that the municipality should seek Electronics Management Funds, the municipality should take action to become eligible for funds on or before December 31, 2022.

- **Away-From-Home Recycling Projects:** Grant funds for away-from-home recycling projects can only be used for recycling related purchases and cannot be used to pay for the purchase of away-from-home receptacles for the collection of waste (garbage). If a proposal includes the purchase of away-from-home receptacles that collect BOTH waste and recyclables, then the standard cash matching fund requirement will be adjusted so that the applicant (grantee) covers the full cost of the waste portion of the container with their matching funds. For example, if a community seeks to purchase a combo waste / recycling station that has one slot for garbage and one for recyclables and the receptacle costs \$1,000 then the applicant will be expected to provide a cash match equal to one half of the purchase price, or \$500. If seeking funding for an away-from-home recycling project, please indicate in the Special Requirements section of the proposal whether any of the equipment to be purchased will be used to collect waste materials that are intended to be disposed of in a landfill.

Applicants for away-from-home related grant projects are strongly encouraged to specify which particular recycling receptacles are being considered for purchase as a part of their proposal. For guidance on the selection of recycling receptacles, please contact Mel Gilles at (919) 707-8127, mel.gilles@ncdenr.gov or Sandy Skolochenko at (919) 707-8147, sandy.skolochenko@ncdenr.gov.

Grant Project Period / Funding Period:

Successful grant applicants will be required to enter into a grant contract with the N.C. Department of Environmental Quality (DEQ). The resultant grant contract period is intended to align with the local government fiscal year and will generally have a one (1) year contract long term. Grantees must expend funds within the year-long contract period unless the grant contract end date is extended by written agreement between the applicant and the DEQ. Extensions are possible but not guaranteed. It is anticipated that grant contracts resulting from this grant cycle will begin on July 1, 2022 and end on June 30, 2023. **All purchases must be made within the grant contract period. Any purchases made prior to the start of the grant contract or after the end date of the grant contract will not be eligible for reimbursement.**

Proposal Due Date:

Proposals **MUST** be received by DEACS by **5:00 p.m. on Thursday, February 17, 2022**. Any proposals received after the deadline will not be considered. Local governments requiring board approval to apply for grant funds should plan to procure that approval before the submittal deadline. **Late proposals will not be accepted.**

How to Submit Proposals:

One electronic copy of the proposal must be submitted by email to sandy.skolochenko@ncdenr.gov. Receipt of all acceptable proposals will be acknowledged by e-mail. ***If you do not receive a confirmation, contact Sandy Skolochenko at sandy.skolochenko@ncdenr.gov or 919-707-8147 as soon as possible.*** It is the responsibility of anyone submitting a proposal to contact DEACS if they do not receive a confirmation. No arrangements will be made for lost applications after the due date. Please submit electronic versions of proposals as Microsoft Word (preferred) or Adobe (PDF) files. If submittal of an electronic version of a grant proposal presents a hardship, please contact Sandy Skolochenko to discuss submittal options.

Required Proposal Format:

The following outline indicates what applicants **must** include in their proposal for their application to be considered complete. Proposals that fail to provide all of the required information or that fail to follow the following format may not compete well and may not be considered for funding.

- Project Title
- Applicant Contact Information: to include the following:
 - ✓ Name and title of main contact
 - ✓ Organization
 - ✓ Address
 - ✓ Phone number
 - ✓ E-mail address
- Date of Proposal Submittal: this should be the date the proposal is submitted to DEACS
- General Requirements: (see General Requirements section for more information)
 - ✓ Written statement certifying that Solid Waste Disposal Tax Proceeds are used only for solid waste management purposes and a description of how proceeds are used.
 - ✓ Written statement indicating that the applicant has recycling services for cans, bottles and paper available at the key government buildings and a list of the materials collected.
 - ✓ Written statement indicating that the applicant has established a program for the collection and recycling of fluorescent lights and mercury containing thermostats from public buildings owned by the applicant.
- Project Description: Provide responses to each of the following prompts below. Applicants are encouraged to provide a clear project description and consider the Award Criteria as they describe the project elements.
 1. Describe the proposed project and identify specifically what items (and how many) you intend to purchase with grant funds.
(Planning: 0-20 points; Priority Project: 0-10 points)
 2. What is the anticipated service life for the items or materials to be purchased with grant funds? Estimate how long the project will continue to serve the community and how you will sustain the project after the grant ends.
(Planning: 0-20 points; Efficiency/Cost Effectiveness: 0-20 points)
 3. How does the proposed project address a specific recycling need for the community? Will the grant project create a new service, enhance or expand an existing service, or support an existing recycling service without expanding that service?
(Demonstration of Need: 0-20 points)

4. How many households or businesses will be impacted by or have access to the recycling services associated with the proposed project?
(Demonstration of Need: 0-20 points; Efficiency/Cost Effectiveness: 0-20 points)
 5. Estimate the number of tons of waste expected to be reduced annually as a result of the proposed project. Please explain how you came up with the estimate.
(Waste Reduction Impact: 0-25 points)
 6. Describe any partnerships associated with the proposed project. Please include documentation of support from any partner entities.
(Joint Effort: 0-5 points)
- Special Requirements: Proposals for recycling education, school recycling, electronics recycling or away-from-home recycling must include additional information as stipulated in the Special Requirements section.
 - Project Timeline: Simple bulleted list showing approximate dates for major project milestones. Timeline must begin on or after July 1, 2022 and project must be complete by June 30, 2023. Please follow the example below:
 - ✓ November 1, 2022: Carts and educational materials purchased, and commercial recycling program launched *(adjust based on proposed project)*
 - ✓ May 31, 2023: Submit all invoices and draft Final Report to DEACS *(required)*
 - ✓ June 30, 2023: Submit Final Report to DEACS *(required)*
 - Project Budget: to include the following:
 - ✓ Itemized list of intended expenditures and estimated costs;
 - ✓ Total project cost with breakdown of grant funding requested from the state and amount of matching funds to be provided by the applicant (see Cash Match Requirements);
 - ✓ Please submit in a table following the example below:

Project Elements	Estimated Cost		
Recycling Carts for Commercial Recycling Program	\$ 10,500		
Labels for Carts and Signs for Recycling Sites	\$ 900		
Program Brochures (Printing)	\$ 600		
Project Budget	Total Project Cost	State Grant Award	Applicant Cash Match
Total	\$ 12,000	\$ 10,000	\$ 2,000

* Note about Project Budgets: state and local sales taxes **are not** reimbursable expenditures and should not be included as part of grant budgets.

Grant Selection Process:

A selection committee will use the pre-established Award Criteria identified below to rank proposals and make award decisions. The review process is expected to be completed and preliminary award announcements should be made by April 2022.

Award Criteria:

Applicants are encouraged to consider the following Award Criteria as they develop their grant proposals.

1. **Demonstration of Need (0-20 points):** Does the proposed project address a specific equipment, educational, or infrastructure need for the community?
2. **Planning (0-20 points):** Did the Project Description include all necessary elements as outlined in the Required Proposal Format? Is the proposal well thought out, well researched and backed by valid facts and assumptions? Is the project consistent with recycling industry best management practices?
3. **Waste Reduction Impact (0-25 points):** Will the project contribute substantially toward reduction of the local waste stream or will it substantially increase tonnage recovered through recycling services? Will the project improve the material quality in the recycling stream by reducing contaminants?
4. **Efficiency / Cost-effectiveness (0-20 points):** Will the project improve the efficiency or cost-effectiveness of the local waste reduction program? Does the project increase the efficiency or effectiveness of an existing recycling service? Does the project reduce the operating cost of a current recycling service or does it adopt practices proven to be cost effective in other communities? Does the project make investments that will continue to serve the community for years to come?
5. **Joint Effort (0 or 5 points):** One-party proposals will receive zero (0) points; multi-party proposals (involving cash match from all participants) will receive five (5) points.
6. **Priority Project★ (0-10 points):** Is the project seeking funding for a Priority Project Grant? To what extent does the project support investments in one of the Priority Project Grant categories?

If a Proposal is Selected for Funding:

DEACS anticipates that applicants selected to receive grant funding will be notified by the end of April 2022. DEACS will notify the applicant with a formal offer by e-mail. The applicant must accept or decline the offer. The following will occur once the offer of grant funding is accepted:

- DEACS may work with applicants to revise initially submitted proposals before entering into a grant contract. Any changes to initial proposals must be approved by DEACS and the applicant and the resultant Final CWRAR Proposal will become an attachment to the grant contract.
- The annual CWRAR Grant cycle typically receives funding requests that exceed available funds. However, it is a priority for DEACS to support as many qualifying projects as possible. After close examination of funding requests and subject to agreement with the applicant, DEACS may award grant amounts lower than the original request.
- Successful applicants will be required to:
 - Provide their federal tax ID number.
 - Register with the state's e-procurement system using the same address provided in the applicant's proposal. To register in the state's e-procurement system or confirm/update your existing registration, please visit the following link: <http://eprocurement.nc.gov/>.
 - Submit a Conflict of Interest Policy using the following template or submitting a copy of your organization's existing policy: <https://deq.nc.gov/conservation/recycling/programs-offered/grants-local-governments#Forms>
- All applicants selected for funding will undergo a compliance review to ensure that they do not have an outstanding Notice of Violation (NOV) related to North Carolina solid waste statutes and rules. Any outstanding NOVs must be corrected to the satisfaction of the N.C. Division of Waste Management (DWM) prior to any grant being awarded. Applicants with outstanding NOVs are responsible for providing DEACS with information from DWM indicating that the community is in compliance and that the NOVs have been corrected before a grant contract can be initiated.
- DEACS will submit a request through the DEQ contract processing system for a grant contract. Grantees must act to execute the resultant grant contract without excessive delay.

NOTE: Successful applicants that make purchases before a grant contract is signed by both DEQ and the grant recipient will not be reimbursed.

Other General Terms and Conditions:

All grantees are subject to the following terms and conditions. Most of these terms and conditions will be outlined in the grant contract.

- **Publications:** all documents and publications associated with a grant contract should be printed on recycled paper containing at least 30 percent post-consumer content.
- **Final reports:** a draft final report is required to be submitted to DEACS at least 30 days prior to the contract end date and a final report is required to be submitted by the contract end date. Final reports and drafts should be submitted electronically. All applicants are strongly encouraged to visit the following web site to review the final reporting format and guidelines:
<https://deq.nc.gov/conservation/recycling/programs-offered/grants-local-governments>.
- **Extensions / Amendments:** no-cost time extensions are possible but not guaranteed for grant contracts. Grantees seeking no-cost time extensions should submit a request for a time extension at least sixty (60) days prior to the contract end date.
- **Reimbursement:** distribution of DEACS grant funds is on a reimbursement basis. Requests for reimbursement can only be made after the grantee has completed purchases associated with the grant project. Reimbursement requests must be submitted on letterhead, must include copies of invoices, and must include proof that the grantee has made payment. Proof of payment may include copies of canceled checks or other financial reports showing that funds were spent. **State and local sales taxes are not reimbursable, may not be counted towards expenditure requirements, and should be excluded from reimbursement requests.** The amount of actual grant payments may be prorated for projects and / or project elements that come in under budget.
- **Final 10 Percent of Funds:** DEACS will continue to reimburse grantees until 90 percent of the grant award amount has been expended. The final 10 percent of grant funds will be held until an acceptable final report has been received by DEACS. The final report must be received and approved prior to the end date of the contract.

A Final Word on Grant Writing:

Proposals may receive low scores or even be rejected because applicants fail to follow the instructions outlined in this document. Applicants stand a better chance of success if they include all of the required components of a proposal and if they follow the Required Proposal Format. Project Descriptions should be clear, concise, and should demonstrate thoughtful planning. Poorly prepared proposals create uncertainty about the project goals and intended results. Clear details will provide grant proposal reviewers confidence about the viability and feasibility of a proposal. Applicants with questions are encouraged to contact DEACS for more information.

Please see the original email of the Grant Award for the grant application submitted to the NCDEQ with the document titled "Original Submission of Grant_Johnson_Jeanette_2022 CWRAR Grant.docx" along with correspondence that led to the approval of the adjusted grant document titled "Johnson_Jeanette_2022 CWRAR Grant_Adjusted_Sandy Skolochenko NCDEQ_Approval.docx".

From: Skolochenko, Sandy <sandy.skolochenko@ncdenr.gov>
Sent: Thursday, March 31, 2022 11:08 AM
To: Johnson, Jeanette <jjohnson@wakeforestnc.gov>
Subject: RE: [External] 2022 CWRAR Grant_Jeanette Johnson_Town of Wake Forest

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe. Please use the Phish Alert Button to submit any suspicious emails for review.

Good morning Jeanette,

Nice to see you last week at CRA.

I'm pleased to inform you of our decision to preliminarily award your 2022 Community Waste Reduction and Recycling Grant proposal for a total of \$24,000 in state funding. We are now initiating an approval process within our Department to make final awards.

I recognize that this is less than the original requested amount. Due to the large number of competitive grant applications, we are able to partially fund your proposed project with the following revisions:

- Full funding for post cards and cart tags, rounding up to \$7,500 in grant funds
- Funding in the amount of \$16,500 toward the purchase of 96-gallon recycle carts
- All other items in the budget table would be covered by the Town of Wake Forest if you decide to move forward. All line items not receiving state grant funding should be moved to a separate table.

By April 15, please submit the following information:

1. **Confirm acceptance of the award.** First and most importantly, please let me know if you are still able to complete the project with this level of funding and the revisions outlined above.
2. **Conflict of Interest Policy:** Our contracts department requires all grantees to submit a Conflict of Interest Policy. Please use the attached template and copy the text onto your letterhead (removing the instruction boxes at the top) and tweak the working as needed. If you have an existing Conflict of Interest Policy that meets or exceeds the language of the attached template you may submit that instead.
3. **Revise proposal:** Assuming you accept the grant, we will need to you revise your proposal to reflect the change in grant funding and project scope. Can you also let us know who does the cart tagging? Is it the drivers, or a separate team that goes out ahead of the routes?
You are welcome to make these updates, or I can revise your proposal using track changes and send to you for review. Please let me know how you'd like to proceed.

Please feel free to contact me anytime if you have questions or would like to discuss next steps.

Congratulations! I look forward to working with you.

Sandy Skolochenko
Recycling and Materials Management Section
Division of Environmental Assistance and Customer Service
North Carolina Department of Environmental Quality
919.707.8147
Sandy.Skolochenko@ncdenr.gov



Email correspondence to and from this address is subject to the North Carolina Public Records Law and may be disclosed to third parties.

Johnson, Jeanette

From: Skolochenko, Sandy <sandy.skolochenko@ncdenr.gov>
Sent: Thursday, April 7, 2022 10:04 AM
To: Johnson, Jeanette
Subject: RE: [External] 2022 CWRAR Grant_Jeanette Johnson_Town of Wake Forest
Attachments: Johnson_Jeanette_2022 CWRAR Grant_Adjusted.docx

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Good morning Jeanette,

The budget looks great. I edited one sentence in the proposal describing the grant-funded purchases on page 5 using Track Changes. With that change, the proposal is approved from our end!

Thanks,
Sandy

From: Johnson, Jeanette <jjohnson@wakeforestnc.gov>
Sent: Thursday, April 7, 2022 9:52 AM
To: Skolochenko, Sandy <sandy.skolochenko@ncdenr.gov>
Subject: RE: [External] 2022 CWRAR Grant_Jeanette Johnson_Town of Wake Forest

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Sandy,

Good Morning. I hope you are doing well. I went through the original proposal and updated everything based on the document you sent me.

Will you please provide in writing in an email if this is an acceptable version of our application so that we may move forward with seeking commissioner approval of the grant for the Town?

I appreciate all of you assistance and patience on this.

Thank you so much.



TOWN of
WAKE FOREST
PUBLIC WORKS

Jeanette Johnson
Sustainability Coordinator
234 Friendship Chapel Rd
Wake Forest, NC 27587-7387
Office – 919-435-9585
www.wakeforestnc.gov



[Sign up for Waste Wizard!](#)

From: Skolochenko, Sandy <sandy.skolochenko@ncdenr.gov>
Sent: Wednesday, April 6, 2022 1:34 PM
To: Johnson, Jeanette <jjohnson@wakeforestnc.gov>
Subject: RE: [External] 2022 CWRAR Grant_Jeanette Johnson_Town of Wake Forest

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Hi Jeanette,

I reviewed your updated budget and have one revision: the \$7,500 for educational materials can be used towards the Recycle Right postcard (printing and mailing) and the Contamination Cart Tags but not the Truck Wrap.

I attached a proposed budget for how I think it should look in the final proposal. I also removed quantities in the grant-funded table to give you flexibility if you want to purchase more or less of any item. Let me know if you have questions or want to talk it through.

Also, I reviewed the Conflict of Interest policy and I'm pretty sure it will suffice. Occasionally questions come up with our contracts department when we get to that step but the policy you attached appears to meet all of our criteria.

Thanks,
Sandy

From: Johnson, Jeanette <jjohnson@wakeforestnc.gov>
Sent: Tuesday, April 5, 2022 1:59 PM
To: Skolochenko, Sandy <sandy.skolochenko@ncdenr.gov>
Subject: RE: [External] 2022 CWRAR Grant_Jeanette Johnson_Town of Wake Forest

CAUTION: External email. Do not click links or open attachments unless you verify. Send all suspicious email as an attachment to [Report Spam](#).

Sandy,

Good Afternoon. I hope you are doing well today. I have had a conversation with Town Management and I will need to get the information in before this Friday for us to be on the Commissioner meeting list to seek acceptance of the grant.

Management has asked me to receive written approval (via email should be fine) of the adjusted quantiles on our grant application paperwork so we have the adjusted amounts based on what we asked. I have included the document with affected areas highlighted in yellow.

Additionally, I have attached our Conflict of Interest Policy that management advise I use if you are willing to accept it.

Please let me know if both documents are suitable for moving forward. I would like to go ahead and get this on the schedule for the next meeting so we can move forward if possible.

Thank you so much.



Jeanette Johnson
Sustainability Coordinator
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Wake Forest, NC 27587-7387
Office – 919-435-9585
www.wakeforestnc.gov



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Sent: Thursday, March 31, 2022 11:08 AM
To: Johnson, Jeanette <jjohnson@wakeforestnc.gov>
Subject: RE: [External] 2022 CWRAR Grant_Jeanette Johnson_Town of Wake Forest

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You are welcome to make these updates, or I can revise your proposal using track changes and send to you for review. Please let me know how you'd like to proceed.

Please feel free to contact me anytime if you have questions or would like to discuss next steps.

Congratulations! I look forward to working with you.

Sandy Skolochenko
Recycling and Materials Management Section
Division of Environmental Assistance and Customer Service
North Carolina Department of Environmental Quality
919.707.8147
Sandy.Skolochenko@ncdenr.gov



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From: Johnson, Jeanette <jjohnson@wakeforestnc.gov>
Sent: Thursday, February 17, 2022 3:24 PM
To: Skolochenko, Sandy <sandy.skolochenko@ncdenr.gov>
Subject: [External] 2022 CWRAR Grant_Jeanette Johnson_Town of Wake Forest

CAUTION: External email. Do not click links or open attachments unless you verify. Send all suspicious email as an attachment to [Report Spam](#).

Good Afternoon,

I hope you are doing well. Attached is the 2022 CWRAR Grant Application from the Town of Wake Forest, NC for your consideration.

Thank you for your time and effort. Please let me know if you have any questions.

Thank you.

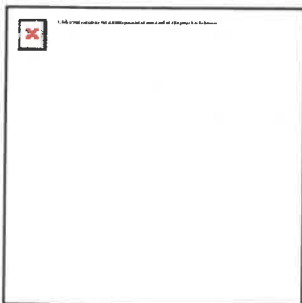


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RESOLUTION 2022- XX

**A RESOLUTION APPROVING THE ACCEPTANCE OF 2022 COMMUNITY WASTE
REDUCTION AND RECYCLING GRANT AWARD FROM NORTH CAROLINA
DEPARTMENT OF ENVIRONMENTAL QUALITY OF \$24,000**

WHEREAS, the grant application was submitted on February 17, 2022 by Town of Wake Forest Public Works staff to the North Carolina Department of Environmental Quality for the request of \$40,000 to support recycling program improvements within the Town; and

WHEREAS, on March 31, 2022, the North Carolina Department of Environmental Quality contacted Town Staff to notify them of the Grant Award of \$24,000 with guidelines for adjustment for use in the 2022-2023 fiscal year; and

WHEREAS, the requested adjustments to the grant application information were made and submitted on April, 7, 2022; and

WHEREAS, the NCDEQ approved of the changes the Town to the grant application on April 7, 2022; and

WHEREAS, the North Carolina Department of Environmental Quality has awarded the grant for the project of acquiring at least 700 96-gallon, blue lid, recycling carts with the intention of upgrading smaller, older carts and providing additional recycling space for Town of Wake Forest Residents and utilizing funds for printable education materials like cart tags and postcards regarding “Recycle Right” and recycling contamination reduction information.

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Town of Wake Forest, North Carolina, approves the acceptance of the financial award from the North Carolina Department of Environmental Quality for the 2022 Community Waste Reduction and Recycling Program Grant for the use of recycling carts and printed educational materials pertaining to contamination reduction and proper recycling for Town of Wake Forest residents.

Adopted this 19th day of April 2022.

ATTEST:

Theresa L. Savary,
Deputy Town Clerk

Vivian A Jones,
Mayor



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-549-

Submitted by: Kip Padgett

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Approval to Amend the FY22 Pay Plan to Add a Full-Time Paralegal

Recommendation:

Approve

Item Summary:

ATTACHMENTS

- [Resolution2022-21ParalegalRequestApril202219.pdf](#)

RESOLUTION 2022-21

RESOLUTION TO AMEND THE APPROVED FY22 PAY & CLASSIFICATION PLAN TO ADD A FULL-TIME PARALEGAL POSITION

WHEREAS, The Town of Wake Forest FY2021-22 Budget Ordinance was approved to include the Pay & Classification Plan; and

WHEREAS, The current budget contains a part-time paralegal position for the Town Attorney; and

WHEREAS, The Town Attorney and the Human Resources Department have been challenged to find a qualified part-time applicant for the position due to the current job market; and

WHEREAS, The Town Attorney seeks to make the position more competitive and attract a broader pool of candidates; and

WHEREAS, The Town Attorney has requested to add a fulltime paralegal position to the FY 2022 Pay & Classification Plan at a paygrade 17; and

WHEREAS, The Town Manager and Chief Financial Officer certify that sufficient funds are available to meet this request.

NOW, THEREFORE BE IT RESOLVED by the Board of Commissioners of the Town of Wake Forest that the Town Manager is authorized to amend the FY2022 Pay and Classification Plan to add a fulltime paralegal position at a paygrade 17.

Duly adopted this 19th day of April 2022.

(ATTEST)

Vivian A. Jones
Mayor

(Deputy) Town Clerk



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-494-
Submitted by: Jennifer Currin
Submitting Department: Planning
Meeting Date: April 19, 2022

SUBJECT

Consideration of CPA-22-01, Revised Draft Town of Wake Forest Community Plan and Land Use Map (March 2, 2022 version)

Recommendation:

Item Summary:

ATTACHMENTS

-



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-523-
Submitted by: Emma Linn
Submitting Department: Planning
Meeting Date: April 19, 2022

SUBJECT

Consideration of a petition requesting annexation submitted by George C. Mackie Jr. and Martha Mackie for property associated with Hamlet at Quail Crossing located at 1423 Deerfield Crossing Drive, being Wake County Tax PIN 1850-26-8976 (portion) and adjacent rights-of-way.

Recommendation:

Item Summary:

ATTACHMENTS

-



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-515-
Submitted by: Emma Linn
Submitting Department: Planning
Meeting Date: April 19, 2022

SUBJECT

Consideration of a petition requesting contiguous annexation submitted by Ammons Property Two LLC for property associated with Traditions Townhomes located at 0 Traditions Grande Boulevard being Wake County PIN 1851-12-8142 and adjacent rights-of-way being approximately 7.5617 acres.

Recommendation:

Item Summary:

ATTACHMENTS

-



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-439-

Submitted by: Sherry Scoggins

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Department Monthly Report

Recommendation:

Item Summary:

ATTACHMENTS

- [March 2022 Monthly Report.pdf](#)

March 2022 | Department Monthly Report



Administration

- No new updates.

Communications

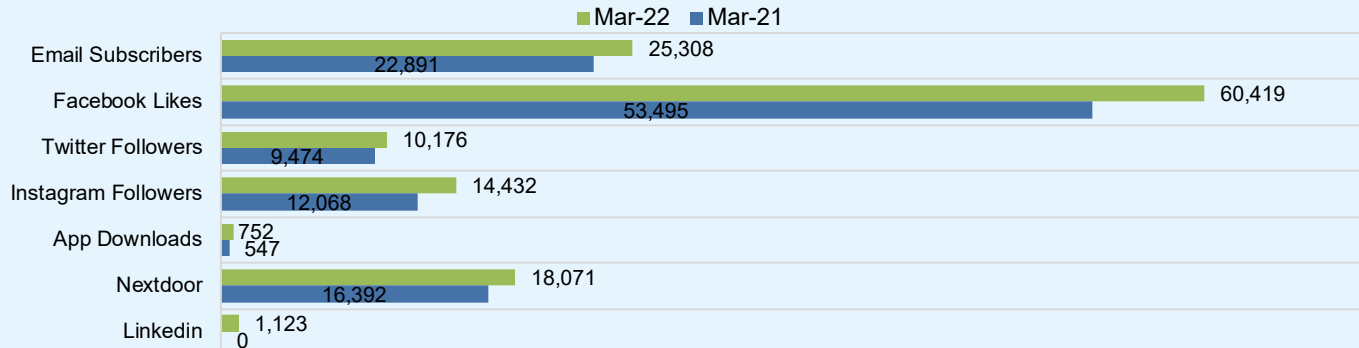
ANNOUNCEMENTS

Media Releases	40
Email Announcements	21
Town-to-Resident Phone Calls/Texts	2

TOP 5 VIEWED PAGES ON WEBSITE

RANK	PAGE	VIEWS
1	Home	10,560
2	Jobs	2,720
3	Bill Payment Options	2,609
4	Friday Night on White	2,355
5	PRCR	1,955

SUBSCRIBERS



Downtown Development

UPDATES PROVIDED QUARTERLY

OCCUPANCY

	JAN- MAR 2022	OCT-DEC 2021
Occupancy Rate in Percentage	90%	88%

NEW BUSINESSES

	MAR - 2022	FISCAL YEAR-TO- DATE
Number of New Businesses	1	9
Number of Businesses Closed	0	9

UPDATES PROVIDED QUARTERLY

EVENTS

THIRD QUARTER EVENTS (JAN-MAR)	ATTENDANCE IN 2022	ATTENDANCE IN 2021
No events held in third quarter		

- Department staff has been busy preparing for the return of the 2022 Friday Night on White season. The concert series returns 4.8.22 with Magic Pipers.
- Downtown sidewalks have been pressure washed and spring plantings are scheduled for early May.
- New logo for Wake Forest Downtown was unveiled in March. The new logo was thoughtfully designed to honor our past, while also showcasing the vibrancy and growth of downtown.
- Downtown Development Manager attended NC Main Street Conference virtually March 8-10, 2022.
- Economic Vitality Committee held an annual meeting with food and beverage retailers on 3.15.22 to discuss successes, challenges, and impact that new residential and commercial development will have on downtown.

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)

	MAR 2022	FEB 2022
Number of responses to RFIs	1	1

BUSINESS RETENTION & EXPANSION (BRE)

NAMES OF BUSINESSES VISITED THIS MONTH

Acadia Realty Trust

High Peaks Real Estate Investments

Ting Internet

Engineering

ENGINEERING PROJECTS Public Infrastructure, Environmental Engineering & Construction

PROJECT	CODE	UPDATE
Stormwater Infrastructure Assessment		Freese and Nichols is working with the Town to integrate the criticality assessment into our stormwater GIS data. The Richland Creek erosion survey was completed the week of 3/21, where 20 miles of streams were inventoried. A full update on the contract will be given to the Board of Commissioners on 4/5. (Project Manager – Monica Sarna)
MS4 Program Updates		Audit Completed 12/1/21. Town received a letter of Notice of Compliance (NOC) for a successful completion of the audit on 2/8/22. A formal response was submitted to the state on 3/8/22, and the state acknowledge receipt. The Town is waiting on the state's review prior to being issued a new MS4 permit. (Stormwater Engineer – Monica Sama)

Finance

FINANCIAL TASKS COMPLETED	
TAX RETURNS & REPORTS	COMPLETION DATE
NC Sales and Use Tax Form E500	March 10
941/NC-5Q Quarterly Payroll Tax Returns	N/A
ORBIT/LGERS Report – NC State Treasurer	March 1
Utility Sales Tax Return – E500 E	March 15
Wake County Prepared Food and Beverage	March 10
ACCOUNTING/FINANCE	AMOUNT
Total Accounts Payable Disbursement	\$2,113,508
Total ePayables Disbursement	88,076
Total Number of Invoices Paid	448
Total Amount of Invoices Paid with credit card	\$342,862
GENERAL TASKS AND OTHER ITEMS	COMPLETION DATE
Closed loan - IPA – Police Cars - \$964,750 – 3 years – 1.25% - Benchmark Community Bank	March 31
Initiated process for 22 Bond Referendum with financial advisors and Local Government Commission (LGC)	
FY 2022–2023 Budget	COMPLETION DATE
Budget requests received from departments	March 21
Public Hearing – input for FY 23 Budget	March 15

PURCHASING / WAREHOUSE	
New Vendors Set Up	16
Purchase Orders Processed	71
Informal Quotes	12
Surplus Items	Sold 15 items - \$184,609
Staff has received two bids for transformers. We are in the process of reviewing and vetting the bids. Delivery times are excessive. More information to come.	

NORTHERN WAKE FOOD SECURITY TEAM	
Staff Hours	12 hours per week
Updates	Funding for hub extended until June 2022

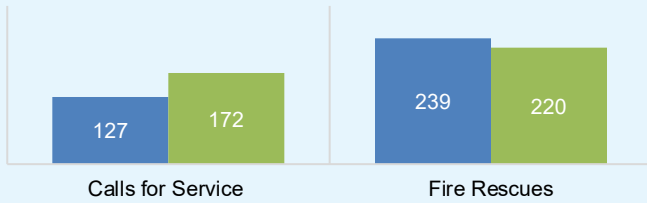
Fire

KEY STATS		
	MAR 2022	FEB 2022
Calls for Service	422	396
Average Response Time	4:24	4:18

TYPES OF CALLS		
	MAR 2022	FEB 2022
Fire	172	127
Medical	220	239
Motor Vehicle Accidents (MVA)	30	30

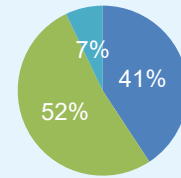
FIRE—KEY STATS

■ Feb-22 ■ Mar-22



TYPES OF CALLS

■ Fire ■ Medical ■ MVAs



Human Resources

PROMOTIONS / TRANSFERS

EMPLOYEE NAME	DEPARTMENT	POSITION	DATE
Donald McClure	Public Works	Construction Worker II	March 7, 2022
Jeremy Muse	Public Works	Tree Trimming Technician I	March 7, 2022
Alyssa Handwork	Police	Telecommunications Shift Supervisor	March 20, 2022
Nikesha Lynch-Sharpe	Police	Telecommunications Shift Supervisor	March 20, 2022
David Nguyen	Police	Telecommunications Shift Supervisor	March 20, 2022

EMPLOYMENT

Positions Filled	362
Vacancies	35
Total Authorized Positions FY 2020–21	397

Information Technology

SERVICE STATS

	MAR 2022	FEB 2022
Service Requests Completed	474	337
Network Uptime Percentage	99%	100%

FIBER INFRASTRUCTURE DASHBOARD

[VIEW](#)

The Fiber Infrastructure Dashboard can be used to monitor the progress of the Fiber Installation Project.

Use Chrome, Firefox, Safari, or Edge when viewing the dashboard.

Inspections & Public Facilities

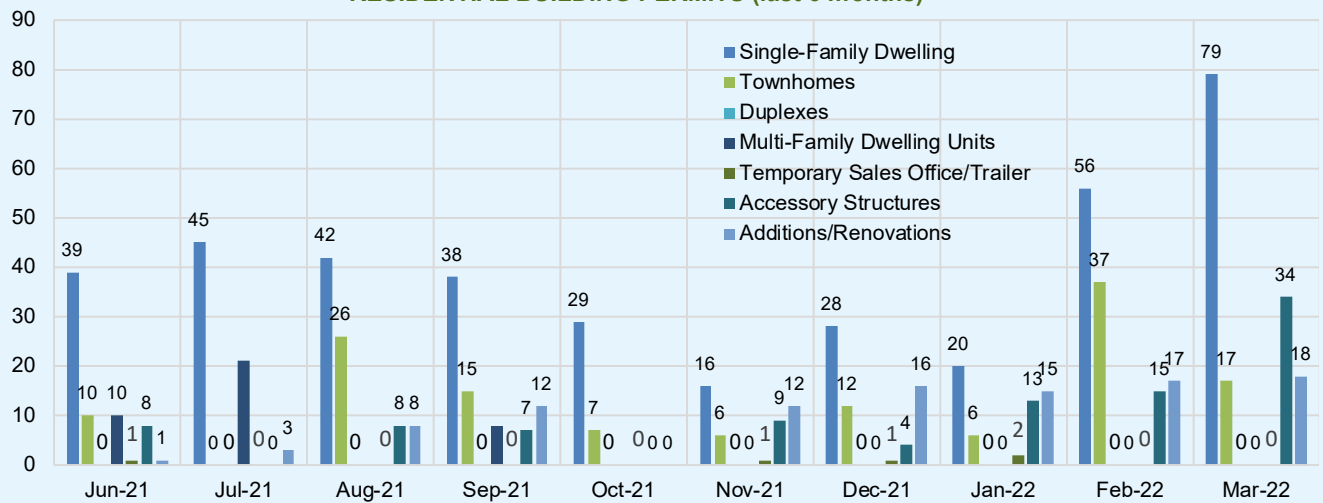
RESIDENTIAL PERMITS

	MAR 2022	MAR 2021
Single-Family Dwelling	79	96
Townhomes	17	20
Duplexes	00	00
Multi-Family Dwelling Units	00	00
Other	180	152
Total	276	268

NON-RESIDENTIAL PERMITS

	MAR 2022	FEB 2022
New Commercial	02	00
Fit-Ups	05	05
Other	36	32
Total	43	37

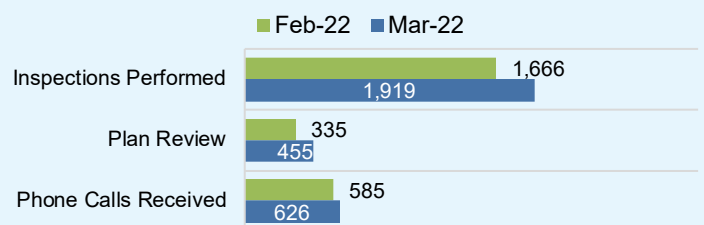
RESIDENTIAL BUILDING PERMITS (last 6 months)



PUBLIC FACILITIES

	MAR 2022	FEB 2022
Preventative Maintenance Completed	377	529
Reactive Work Orders	2	136

DEPARTMENTAL PRODUCTIVITY



BUSINESSES

NEW COMMERCIAL BUSINESSES

Merritt Capital Business Park (Bldg D1)	741 Merritt Capital Dr
Merritt Capital Business Park (Bldg D2)	745 Merritt Capital Dr

FIT-UPS

Big Al's BBQ Restaurant	950 Gateway Commons Cir
Wake Pointe 107 Alteratin	11216 Capital Blvd 107
Royal Nail Spa	1898 S Franklin St 106
Rockbox Fitness	905 Wrigley Dr
SixFour3 Softball Training	740 Merritt Capital Dr 123

PRE-OCCUPANCY

Wake Forest Chiropractic	851 Wake Forest Business Park E
Back Active Chiropractic Clinic	500 Wait Ave 01
Allied Craft Distribution	5053 Unicon Dr L

Parks, Recreation & Cultural Resources

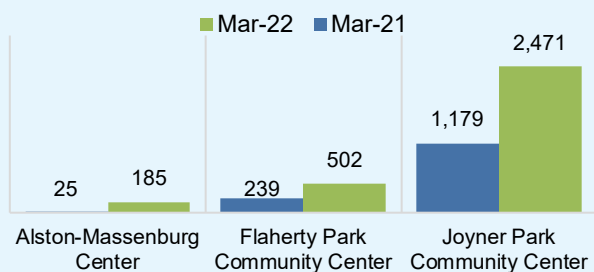
ATHLETICS

	MAR 2022	MAR 2021
Registrations Received – Youth	14	44
Registrations Received – Adult	2 teams	3
Games Held	27	12
Revenue	\$2,350	\$6,740

PROGRAMS

	MAR 2022	MAR 2021
Registrations Received – Youth	192	76
Registrations Received – Adult	2807	462
Classes/Programs Held	47	95
Revenue	\$10,051	\$4,031.37

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	2
Reactive Maintenance	2
PM Inspections and services	73
Evening and Weekend Park Services	4

FACILITY RENTALS

	MAR 2022	MAR 2021
Athletic Fields	34	34
Joyner Park Outdoor / Open Space	2	1
General Outdoor / Open Space	0	0
Picnic Shelters	0	0
Wake Forest Community House	5	0
Joyner Park Community Center	0	0
Flaherty Park Community Center	0	0
Alston-Massenburg Community Center	4	0

VISITORS TO AQUATIC CENTER & SPRAYGROUND

	MAR 2022	MAR 2021
Aquatic Center	closed	closed
Taylor Street Sprayground	closed	closed

Planning

DEVELOPMENT SERVICES MONTHLY REPORT [VIEW](#)

ZONING VIOLATIONS DASHBOARD [VIEW](#)

Use Chrome, Firefox, Safari or Edge when viewing the dashboard.

CERTIFICATES OF APPROPRIATENESS

	MAR 2022	MAR 2021
COAs Received	1	1
COAs Approved	0	1

Police

KEY STATS

	MAR 2022	MAR 2021
Calls for Service	5832	5490
Vehicle Crashes	157	148

Public Works

Public Works had a busy month in March. Our solid waste division ended a successful loose leaf season on March 11th. We started a new brown paper bag policy on March 14th that has been well received by the residents as the education continues throughout the town. Solid waste had staffing shortages but were able to complete all routes in a timely manner.

Fleet started the GPS hardware update on town vehicles, converting them from 3G to 4G/5G network. We have completed 104 r of 251 units. Fleet supported the Police department for their 3 day Pursuit Intervention Technique (PIT) training.

Streets completed the litter index study for the Litter Task Force.

Urban Forestry inventoried 750+ trees, planted 28 trees with a volunteer, continued pruning cycle.

SOLID WASTE

	MAR 2022	MAR 2021
New Construction Homes Added	67	60
New Cart Sets	67	60

RECYCLING

	MAR 2022	MAR 2021
Volunteer Collected Litter	425	0
Volunteer Collected Recycling	0	0
Volunteer Hours	53	0
Volunteer Miles of Streets	1	0
Sections of Roads Cleaned (not miles)	3	0
Number of Creeks Cleaned	1	0
Number of Litter Kits Issued/Returned	4	0

CEMETERY

	MAR 2022	MAR 2021
Number of Plots Sold	5	5
Number of Niches Sold	4	0
Total Plots Available	76	421

Renaissance Centre for the Arts

EVENT & PROGRAM ATTENDANCE

	MAR 2022	MAR 2021
Monthly In-Person Attendance	2082	206
Virtual Views	2801	6410
Ticketed Events Held	7	00
Free Events Held	2	6

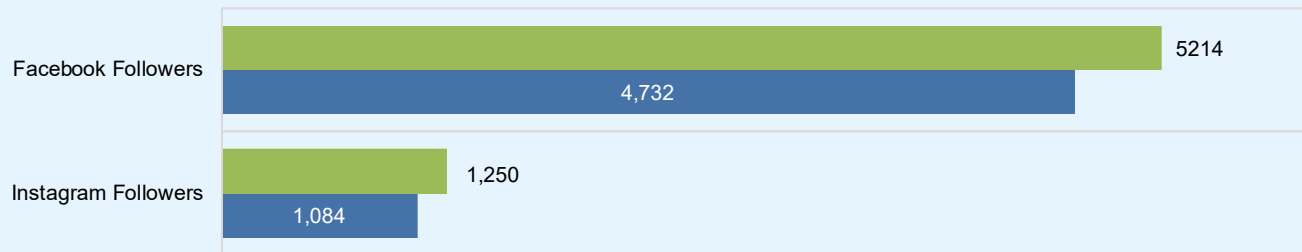
RENAISSANCE CENTRE PROGRAM GUIDE

[VIEW](#)

- The 2022 Wake Forest Film Festival was well attended by citizens, film students and industry professionals. The Film Festival attendance was the highest on record and attracted an audience from across the United States. Post festival surveys revealed 41% of the attendees were first time visitors to the Renaissance Centre.
- North Wake Theatre, in partnership with the Renaissance Centre, presented their first professional show, "Forever Plaid." The audience surveys reported 96% thought the quality of performance was Excellent and 99% stated they were likely or very likely to recommend the Renaissance Centre to a friend.
- The Sons of Mystros brought a culturally diverse audience to the Renaissance Centre and 34% of those surveyed were first time visitors. One patron commented "This place is a hidden gem in Wake Forest. I will definitely be back to support."

SOCIAL ENGAGEMENT

■ Mar-22 ■ Mar-21



Wake Forest Power

CUSTOMER SUMMARY

	MAR 2022	MAR 2021
Electric Meters/Customers	6,664	6,432
Pre-Pay Power Customers	458	443
H.O.P.E. Participants	44	44
N.C. GreenPower Participants	17	17

POWER OUTAGES

	MAR 2022	MAR 2021
Total Number of Customers Affected by Outages this Month	82	00
Average Number of Customers Affected per Outage	20.5	00

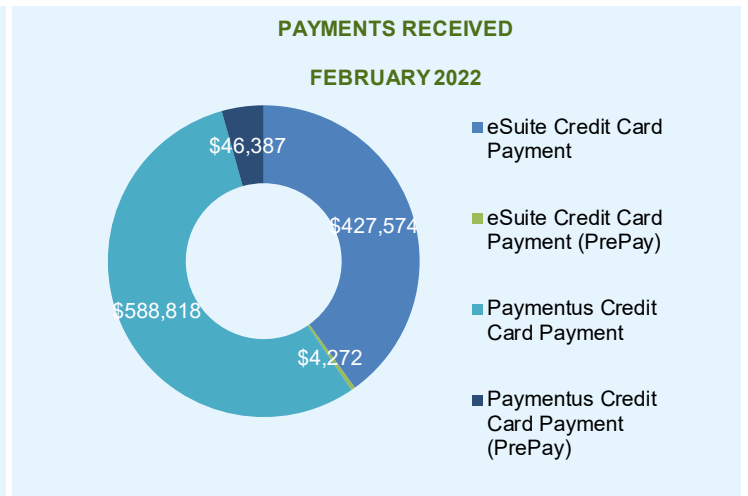
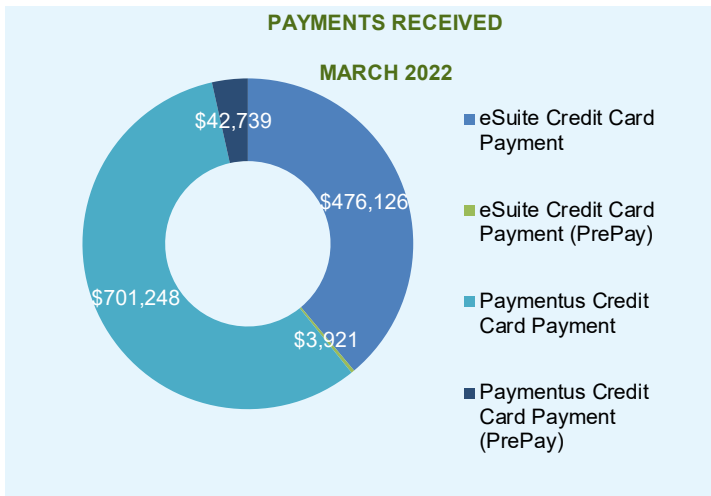
PAYMENTS RECEIVED

	MAR 2022	FEB 2022
eSuite Credit Card Payments	\$476,126	\$427,574
eSuite Credit Card Payments (Pre-Pay)	3,921	4,272
Paymentus CC Payments	701,248	588,818
Paymentus CC Payments (Pre-Pay)	42,739	46,387

NUMBER OF TRANSACTIONS

	MAR 2022	FEB 2022
eSuite Credit Card Payments	812	759
eSuite Credit Card Payments (Pre-Pay)	110	134
Paymentus CC Payments	3,836	3,592
Paymentus CC Payments (Pre-Pay)	1,082	1,169

Note: Transitioning to Paymentus



Advisory Boards

Historic Preservation Commission

MEETINGS

Most recent meeting held 03/09/2022

Number of members in attendance 6 of 9 total

The Historic Preservation Commission elected David Bennett to serve a second, one-year term as Vice-Chairperson of the HPC. Five applications were received from potential members. Four of the five attended the March meeting and introduced themselves to the HPC. The HPC recommended two members to the HPC, one as an ETJ member. The HPC discussed the Historic Preservation Plan Update that is underway, HPC member survey results, Ailey Young House updates, and upcoming CLG Grant Application for 2022-23.

Human Relations Council

MEETINGS

Most recent meeting held 03/24/2022

Number of members in attendance 8 out of 14 total

Town of Wake Forest staff members Lisa Hayes, Strategic Performance Manager & Bill Crabtree, Communications & Public Affairs Director, attended the meeting to discuss Wake Forest Cares 2022. They asked the group for assistance with the event to held on November 19, 2022. The goal is to create a multicultural village at the event with the assistance of the Human Relations Council. The HRC agreed to begin contacting local groups with to create a database of multicultural organizations/communities that could be invited to participate in Town events to include Multicultural Day 2023. The group will discuss the initiative more at the April 2022 meeting.

Public Art Commission

MEETINGS

Most recent meeting held 03/24/2022

Number of members in attendance 7 of 10 total

The Commission members discussed what they want to see in the art plan update.

Parks, Recreation & Cultural Resources Advisory Board

MEETINGS

Most recent meeting held	03/28/2022
Number of members in attendance	7 of 10 total

The board is down to 10 members. Seven members attended this month. This was the board's first in person meeting since February 2020. Representatives with the Pollinator Project attended the meeting this month to discuss how the board and department could partner with them to help save our insect species.

Each task team provided updates on their upcoming activities.

- National Trails Day & 5k Race: June 4th
- Cultural Arts: Event is scheduled for Aug. 27th
- Wake Forest Unplugged: Sept. 11th

Technology Advisory Board

MEETINGS

Most recent meeting held	03/28/2022
Number of members in attendance	7 out of 8 total

The TAB reviewed and vote on a replacement member. They also worked on the April 30th STEM Saturday event.

Urban Forestry Board

MEETINGS

Most recent meeting held	03/22/2022
Number of members in attendance	6 out of 11 total

The urban forestry board worked on their pathway project.



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-484-

Submitted by: Shana Shallenberg

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

CIP Project Tracker

Recommendation:

Item Summary:

ATTACHMENTS

- [CIP Project Tracker Q3_FY2021-2022.pdf](#)

PROJECT TITLE	PHASE	TOTAL PROJECT COST	PROJECT DESCRIPTION	DEPT & PROJECT MANAGER	COMPLETED YES / NO	EXPECTED COMPLETION	PROJECT UPDATE: Q3: Jan-Mar 2022
General Government							
Ailey Young House Rehabilitation	Construction	\$303,500	Preservation of the building Will provide an African American historical resource	Planning Michelle Michael	No	FYE 2023	The property acquisition was delayed due to meeting statutory requirements. It is ongoing and is scheduled for completion in April. The Town Attorney's Office has the lead with the acquisition.
Information Technology							
Information Technology - No active projects this Quarter							
Public Facilities							
Town Hall - Carpet Replacement/Renovations/Office Upfits		\$277,300	Carpet Replacement and office upfits for Town Hall to be completed in FY 21-22	Public Facilities – Mickey Rochelle	No	6/30/2022	Contract has been signed and purchase order issued. Reviewing scope of work and cost information with architect and construction company. Waiting on lead times for materials.
Greenway, Transportation & Pedestrian Access							
Traffic Pedestrian Signals	In Progress	\$135,000	Traffic signals design and installation at several intersections: Heritage Lake Road and Friendship Chapel Road Forestville Road and Song Sparrow Road Wait Avenue and Middlegame	Public Works – Engineering Joe Guckavan	No	Ongoing	The final plans for the Forestville & Song Sparrow signal are complete. The municipal agreement is needed from NCDOT--the updated agreement needs to be scheduled on the NCDOT Board to review.
Dunn Creek Greenway, Phase 3	Right-of-way	\$40,000	Construction of greenway (Town property to NC 98 Business to Oak Grove Church Road) 1.9 mile trail connection to Ailey Young Park	Planning Kari Grace	No	12/31/2021	Continue to work with property owners on obtaining easements.
Smith Creek Greenway, Phase 2	Design, Right-of-Way	\$406,700	1.1 miles of greenway trail and trailhead with parking providing connection between existing trails. This segment will provide a connection from Ligon Mill Road to Burlington Mills Road and ultimately to Raleigh's Neuse River Greenway via the Wake Forest Connector bridge	Planning Kari Grace	No	12/31/2022	Property acquisition still ongoing. Planning continues to work on justification needed for State to approve parking lot location.

Dunn Creek Greenway, Phase 4	Design	\$157,600	0.55 miles of greenway trail within Flaherty Park. The section provides connection to the existing Del Webb section of Dunn Creek, the existing Orchards at Traditions section of Dunn Creek, and Flaherty Farms apartments for the seminary.	Planning - Dylan Bruchhaus	No	10/31/2022	Kimley-Horn submitted 30% design plans for staff review.
Smith Creek Greenway, Phase 3	Design, Right-of-Way	\$24,000	0.8 miles of greenway trail, Provides connection between existing trails. The section will provide a connection from the Smith/Sanford Creek Greenway junction to Ligon Mill Road.	Planning Kari Grace	No	12/31/2021	Condemnation process ongoing.
Ligon Mill Road Operational Improvements	Construction	3781500	Construction of Complete Streets and Operational Improvements along Ligon Mill Road from S. Main Street to the Walmart Driveway. This project consists of widening to a 4-lane, median-divided roadway with bike lanes, extra large sidewalks, curb and gutter and intersection improvements at S. Main Street.	Engineering- Joe Guckavan	No	44561	The project is complete. Some final documentation is still required to close out with NCDOT. We anticipate the closeout process to be complete by end of June.
Bus Shelter Installation	Construction	\$105,000	Installation of three bus shelters and amenities at stops along the Wake Forest Loop.	Planning - Dylan Bruchhaus	No	Ongoing	Installation on hold until Bond Referendum. Staff has developed policies for bench and shelter installation based on ridership levels and planning continues on the first three shelter locations.
Ligon Mill Road Underpass	Design	\$325,000	Project B-5318 replaces the bridge over smith creek and realigns and widens part of Ligon Mill road. The project constructs the Smith Creek Greenway underpass.	Engineering - Joe Guckavan	No	45823	No updates
Parks, Recreation and Cultural Resources							
Parks, Recreation and Cultural Resources- No active projects this Fiscal Year							
Asset Maintenance							
Flaherty Park Dam Maintenance and Repair	Design	\$1,010,200	Remove pond dam and repair stream	Engineering Carrie Mitchell	No	TBD	no update

Wake Forest Reservoir Improvements	Design	\$4,478,500	Dam upfits, Dam inspections, Spillway upfits, Lagoon Decommissioning, Park Improvements: Parking lot, boat ramp, and dock. New Bridges.	Engineering Carrie Mitchell	No	6/30/2023	The Lagoon Closure Project advertised for bids in March 2022, but will have to readvertise due to lack of responses. The request for Community Project Funding in the amount of \$2.175 million for the Wake Forest Reservoir was included in the FY 2022 funding. FEMA or Department of Public Safety will contact the Town regarding next steps.
Sidewalk Replacement	In Progress	\$100,000	Replace deteriorated, broken and/or uneven sidewalks	Public Works - Streets Tim Bailey	No	6/30/2022	No sidewalk added this quarter.
Street Maintenance and Resurfacing	In Progress	\$100,000	Staff is recommending to allocate a portion of 2022 Bond referendum for additional street resurfacing and maintenance. Contracting of planning and rehabilitation is scheduled for FY19/20, completion in FY20/21 and then work to begin in FY21/22. (Includes Procurement, installation, and data management of pedestrian and bicycle counters along Town Greenways as well as pavement markings for seven street bicycle lanes and sharrows segments in Downtown.)	Engineering Joe Guckavan	No	Ongoing	We are pursuing a consultant to help prepare a Pavement Management System Program. This type of system identifies roads that need repair but also roads that have opportunity to extend life expectancy through less expensive treatments. This program will maximize life of asphalt, proactively identify roads for repair and provide the most efficient/cost effective solution.
Stormwater Infrastructure Maintenance and Funding	In Progress	\$325,000	Continual maintenance of Town owned and maintained stormwater infrastructure by the Town of Wake Forest. Work to be conducted by both Town staff and outside contractor. Specific areas will be identified as operating budget is prepared.	Engineering Monica Sarna	No	Ongoing	Freese and Nichols has delivered the criticality assessment for Task 1, and we are currently coordinating with their team to determine the best way to integrate the data into our stormwater GIS system. Freese and Nichols along with Town employees completed a joint stream walks/assessments to analyze the erosion in the Richland Creek watershed as part of Task 2. The data collected in Richland Creek along with a 2D analysis of the entire Town will be compiled into a report with project recommendations for the Town. The Stormwater Utility Fee development outlined in Task 3 will begin soon.
Wake Forest Power							
Line Construction/ System Improvements	In Progress	\$700,000	*Extend and upgrade the Electrical Distribution System	Wake Forest Power Chris Terrell	No	Annual	Legacy Heritage in progress . Devon Square in Progress. Holding Village started.
LED Conversion	In Progress	\$125,000	Convert every light to LED over next 3-5 years	Wake Forest Power Chris Terrell	No	Annual	31 LED poles upgraded.

Electric Building Improvements - 5301 Unicon Dr.		\$250,000	Electric Department Building including building remodel and construction retrofitting	Public Facilities- Mickey Rochelle	No		Gates have been installed and the main gate operator was delivered week of 2/28/22. Will request quotes for asphalt and landscaping by the end of April once all lighting and power for operators have been installed. Will proceed with one or both items based on budget once quotes are received.
Public Works							
Transportation New Sidewalk Projects	In Progress	\$100,000	Streets to install missing sidewalk as identified by Town staff or through the CTP.	Public Works- Streets Tim Bailey	No	Ongoing	Replaced 400LF of sidewalk on Franklin Street, Updated two ADA ramps
Transportation Roadway Lighting		\$50,000	Lighting Town roadways according to NCDOT and Association of State Highways and Transportation (ASHTO) standards	Public Works- Streets Tim Bailey	No	Ongoing	Continuing to ensure neighborhoods are being lit to proper standards.
Major Capital Projects							
Northeast Community Plan	In Progress	\$93,715	Update to the 2007 Northeast Neighborhood Plan	Planning Michelle Michael	No	Winter 2021	The NE Community Plan was adopted on December 7, 2021. It is available on the Town website on the Community Planning Page, click on Northeast Community Plan. www.wakeforestnc.gov/long-range-planning/community-planning
Community Plan	In Progress	\$206,760	Update to the 2009 Community Plan	Planning Jennifer Currin	No	Spring 2022	Draft Community Plan published online January 11 for public comment. Engage Wake Forest page created for Community Plan. Houseal Lavigne presented draft Plan to Planning Board on January 31st and public comment session held. Two Open House Workshops held on February 1. Revised draft Community Plan published online March 2. Planning Board discussed continued item at their March 8 meeting and unanimously recommended approval with conditions.
Completed Projects							
W. Oak Avenue Pedestrian Underpass	Complete	\$168,000	*Pedestrian connections along W. Oak Ave: N. Wingate to N. Main Street	Administration Candace Davis	Yes	6/30/2016	
Rogers Road Widening & Pedestrian Underpass	Complete	\$1,755,500	*Pedestrian underpass to connect Smith Creek Greenway and sidewalk on Rogers Rd	Administration Candace Davis	Yes	11/8/2016	
Athletic Fields Lighting System Replacement/ Installation*	Complete	\$1,279,000	*Replacement plan for lighting at athletic fields	Parks, Recreation & Cultural Resources Ed Austin	Yes	1/31/2017	
Public Safety OSSI System Refresh	Complete	\$40,000	*Upgrade existing OSSI hardware and operating systems	IT Tom LaBarge	Yes	2/15/2017	

Renaissance Centre Renovations Phase 1	Complete	\$1,237,000	*upgrade and renovate areas to improve ability to satisfy the needs of different users	Public Facilities Mickey Rochelle	Yes	3/10/2017	
Hedrick Property Purchase	Complete	\$595,515	N/A	Public Works	Yes	9/5/2017	
Spraygrounds/ Water Features*	Complete	\$411,268	*New sprayground water features at Smith Creek, Flaherty Park, and Future Center	Parks, Recreation & Cultural Resources Ruben Wall	Yes	9/8/2017	
Installation of Irrigation and Sod at Flaherty Park Baseball/ Softball Fields*	Complete	\$138,000	*Building sand-based grass infield *Grading of entire field *Installation of hybrid sod on Field 2	Parks, Recreation & Cultural Resources Ruben Wall	Yes	11/30/2017	
Renaissance Centre Renovations Phase 2	Complete	\$995,800	*upgrade and renovate areas to improve ability to satisfy the needs of different users	Public Facilities Mickey Rochelle	Yes	4/21/2018	
Communication Center Hardware Upgrade/ Vista 911	Complete	\$180,000	*Upgrade current hardware to receive 911 transfers and landline/cellular information, provide analytics	IT Jeff Leonard	Yes	6/30/2018	
Security systems for Flaherty Community Center, Holding Community House, and Parks and Recreation	Complete	\$137,500	*Security alarms and cameras *Install card access at remaining buildings	Public Facilities Mickey Rochelle	Yes	6/30/2018	
Equipment/Materials Storage Building	Complete	TBD	Add Storage Building at Heritage Park / Reduce Time Transporting Equipment from Maintenance Shop	Parks, Recreation & Cultural Resources Ruben Wall	Yes	6/30/2018	
Smith Creek Stream Bank Repair	Complete	\$200,000	* Repair of approximately 200 LF of stream bank due to damage from Hurricane Matthew. *Working with FEMA on 404/406 funding	Public Works - Engineering Carrie Mitchell	Yes	7/18/2018	
Athletic Court Reconstruction*	Complete	\$62,500	*Reconstruction of Tyler Run and Ailey Young basketball courts	Parks, Recreation & Cultural Resources Ruben Wall/Josh Glover	Yes	9/4/2018	
Holding Park Pool and Playground Renovation	Complete	\$2,929,000	*Renovation of Holding Park pool *Improved /more accessible playground with improved drainage system	Parks, Recreation & Cultural Resources Ruben Wall	Yes	9/15/2018	
Dunn Creek Greenway - Downtown Connector	Complete	\$1,491,500	*Construction of a 10' wide greenway (approximately .36 miles) from the NC 98 (Dr. Calvin Jones Highway) pedestrian culvert (approximately 9 feet wide, 8 feet high) north to town property	Administration Candace Davis	Yes	10/31/2018	
Smith and Sanford Creek Greenway	Complete	\$6,054,935	*Construction of a continuous pedestrian facility consisting of approximately 2.4 miles of greenway	Administration Candace Davis	Yes	10/31/2018	

Road Connections	Complete	\$8,286,000	*Street Connections Project includes: Forest Rd, Royal Mill, Police Parking Lot, Curb and Gutter in SFBP, striping on Retail Dr.	Community Development	Yes	11/17/2018	
Road Connections	Complete	\$8,286,000	Roadway connections: Forest Road, Royal Mill connection in Traditions, Heritage Branch and Rogers Road	Public Works – Engineering - Jonathan Jacobs	Yes	1/31/2019	
North Main Stormwater Repair and Roadway Rehabilitation	Complete	TBD	Relocate and replace failing stormwater pipe and box between North Main St., N. College St. and N. Wingate St. Upgrade existing boxes on North Main Street (US1A) to current standards with hood and grade, re-granite curb as needed, and resurface street to minimize flooding.	Public Works – Engineering - Jonathan Jacobs	Yes	4/30/2019	
Richland Creek Stream Restoration, phase 2 (The Cottage)	Complete	\$100,000	Repair of approx. 150 LF of stream bank and greenway undercut due to Hurricane Matthew. FEMA approved \$16,000 for reimbursement	Public Works – Engineering Carrie Mitchell	Yes	7/31/2019	
Joyner Park Phase 2	Complete	\$11,880,930	Master Plan for Joyner Park Community Center and other improvements to the park	Parks, Recreation & Cultural Resources Ruben Wall	Yes	8/31/2019	
Comprehensive Transportation Plan	Complete	\$199,363	*Multimodal Transportation Plan	Planning	Yes	11/30/2019	
Downtown Improvements Phase 3	Complete	\$5,600,000	Continue implementing the Renaissance Plan for the Downtown section of Wake Forest; improvements to streets and landscaping within the downtown area. Phase 3 of the project	Administration Candace Davis	Yes	12/6/2019	
Richland Creek Stream Repair 2017	Complete	\$116,950	Repair of approximately 150 LF of stream bank and greenway undercut due to Hurricane Matthew. FEMA approved \$16,000 for reimbursement	Public Works – Engineering Carrie Mitchell	Yes	1/31/2020	
Senior Center Expansion	Complete	\$4,861,300	Exercise room addition Roof replacement for existing facility Multipurpose room addition HVAC Replacement	Public Facilities Mickey Rochelle	Yes	2/3/2020	
Board Chambers A/V Camera System	Complete	TBD	Update existing audio visual, camera and sound system in the Board Chambers for televising meetings	Administration Aileen Staples	Yes	3/1/2020	
Dog Park Upgrades	Complete	\$155,000	New configuration, shade structures, fencing, water fountains, and ADA access	Parks, Recreation, & Cultural Resources Josh Glover	Yes	3/20/2020	

Installation of Irrigation and Sod Flaherty Park Field #3	Complete	\$60,000	Grading and sod installation in the outfield portion.	Parks, Recreation, & Cultural Resources Josh Glover	Yes	7/30/2020	
North White Street Landfill - Cap Construction	Complete	\$565,000	In July 2017, the town received a notice of violation (from NCDEQ - Solid Waste Section) of minimal levels of contaminants and was directed to put together a corrective action plan (CAP).	Public Works- Magda Holloway/Jeanette Johnson	Yes	7/30/2020	
Priority Pedestrian Corridors: Wait & West Oak Avenue	Complete	\$3,800,000	Construction of pedestrian connections along Wait Avenue and West Oak Avenue. This project consists of sidewalk on Wait Avenue from S. Allen Drive to east of Dunn Creek connecting to existing sidewalk, upgrading the intersection of S. Allen and Wait Ave with Pedestrian Signals, installation of sidewalk and multi-use path on West Oak Avenue, with a new connection to Joyner Park.	Public Works – Engineering Jonathan Jacobs	Yes	12/31/2020	
Stadium Drive Complete Street	Complete	\$10,643,800	Construction of Complete Streets and widening along Stadium Drive from Capital Blvd to Wingate Street. This project consists of turn lanes, curbs/gutters, wider shoulders, improved pedestrian access, new transit stops, benches, and a bus shelter.	Public Works – Engineering Jonathan Jacobs	Yes	12/31/2020	
Forestville Road Pedestrian Underpass	Complete	\$349,000	*Pedestrian underpass to connect Sanford Creek Greenway and sidewalk on Forestville Road *Bridge Replacement	Administration Candace Davis	Yes	6/30/2021	
Fiber Infrastructure Project	Complete	\$2,496,158	Interconnect Town sites with a fiber network infrastructure	IT Adam Oates	Yes	9/1/2021	All buildings within the Town are now connected on Fiber and the project has been completed.
Endeavor Charter School	Complete	\$750,000	Offsite infrastructure Improvements related to the Traffic Impact Analysis submitted in June 2020 and providing safe ingress and egress to the newly expanded school. (Intersection of Burlington Mills Road and One World	Engineering - Joe Guckavan	n/a	11/30/2021	Complete.
Ailey Young Dam Removal & Stream Repair	Complete	\$817,105	Remove pond dam Repair stream	Engineering Carrie Mitchell	No	12/31/2021	Complete.
Greenway and Park Signage, Phase 1	Complete	\$1,082,500	*Wayfinding, phase 1- Sign implementation across greenways and parks	Public Works	Yes	9/30/2022	

Public Works Operations Center (Renovation/Upgrade)	Complete	\$16,110,000	Expansion of the Operations Center	Public Facilities Mickey Rochelle	No	TBD	
Rogers Branch Installment	Complete	\$759,900	Extension of Rogers Branch Road from its current dead end to the intersection of Foundation Drive and Forestville Road	Engineering - Joe Guckavan	n/a	TBD	Complete.



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-487-

Submitted by: Shana Shallenberg

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Strategic Plan

Recommendation:

Item Summary:

ATTACHMENTS

- [Strategic Plan Working Document_Q3 Jan-Mar 2022.pdf](#)

GOAL 1: Economic Development



STRATEGY: Foster environment that supports growth and expansion

TASK	NOTES	Q1 UPDATES JULY 2021 – SEPTEMBER 2021	Q2 UPDATES OCTOBER 2021 – DECEMBER 2021	Q3 UPDATES JANUARY 2022 – MARCH 2022	Q4 UPDATES APRIL 2022 – JUNE 2022
Partner with various organizations to develop an entrepreneur program	- Working with two regional technology incubators and local tech partners to develop programs. (COMPLETED) - Anticipate agreements to be executed this summer for a site in Downtown Wake Forest. (COMPLETED) - Grow WRAL TechWire community spotlight partnerships with technology focused businesses. (ONGOING)	Loading Dock Wake Forest (LDWF) is currently scheduled to welcome members in Fall 2021. Supply chain issues have caused ongoing delays. Wake Forest Business and Industry Partnership (WFBIP) is partnering with CoWorking NC to develop a curriculum of programming gleaned from surveys and interviews with Wake Forest entrepreneurs designed to meet the needs of the local entrepreneurial ecosystem. This programming will be coordinated with and offered at LDWF upon its opening. 3 articles/news features remain in the existing partnership with WRAL TechWire and will be published in the coming months.	Loading Dock Wake Forest (LDWF) opened for business and held their launch party on 12.4.21. Membership sales and office space rentals are off to a strong start. Wake Forest Business & Industry Partnership (WFBIP), in partnership with CoWorking NC, has finalized a curriculum of programming specifically designed to address the growth and development needs of Wake Forest’s local small businesses and entrepreneurs. The programming will be launched by LDWF, most likely in Q4, and integrated into the other programming it offers to its members. However, all programming developed/designed by WFBIP will be to all Wake Forest businesses. One article – 5 New Developments Coming to Downtown Wake Forest – was published this quarter in	The Loading Dock Wake Forest (LDWF) reports strong membership growth and continuing interest through its first quarter of operations. As previously noted, a curriculum of programming to support Wake Forest small businesses and entrepreneurs has been prepared by the Wake Forest Business & Industry Partnership (WFBIP) and is awaiting implementation. The programming will be launched and facilitated by LDWF in Q4 and integrated into the other programming it offers to its members. However, all programming developed/designed by WFBIP will be available to all Wake Forest businesses and entrepreneurs. Two articles remain in the partnership with WRAL TechWire. Discussions on how to optimize marketing on the remaining pieces are underway.	

			WFBIP's WRAL TechWire Content Partnership. Two articles remain in the partnership, with one each expected to be published in Q3 & Q4.		
<i>Advance the development of a Live-Work-Play Technology Park</i>	- Currently going through Electricities site certification program. (COMPLETED) - DFI performing market analysis. (COMPLETED) - RFQ released for site engineering and architectural services. (COMPLETED)	Our partners at UNC's Development Finance Initiative (DFI) performed a refreshed market analysis last quarter. The effects of COVID have significantly changed the current demand for office space as well as lingering uncertainty in future demand. In response, WFBIP has commissioned an analysis by economist Ted Abernathy, Principal of Economic Leadership. He has been tasked to examine the "Tech Sector" industry assets Wake Forest holds within the Triangle and region. The results of this analysis are expected by the end of October 2021 and will spearhead an effort to pivot the "work" component of the Wake Forest Business & Technology Park (WFBTP) from office to respond to the growing and more consistent demand for life science, R&D, & Bio/Pharma opportunities. A targeted recruitment strategy will need to be developed as WFBIP pursues this new direction to advance the development of the WFBTP.	The "Tech Sector Analysis" commissioned by the Wake Forest Business & Industry Partnership (WFBIP) with Ted Abernathy of Economic Leadership was completed this quarter and is under initial review by stakeholders.	A February 25, 2022 presentation on the Tech Sector Analysis to the major stakeholders for the Wake Forest Business & Technology Park (WFBTP) Site was provided by Ted Abernathy of Economic Leadership, including recommendations for next steps. Presentation included valuation projections of the WFBTP property transitioned to a Life Science-anchored mixed-use park. Developer interest remains strong. This process will culminate – forecasted in Q1 of FY 22-23 – in a Request for Proposals to the development community to produce the concept as re-envisioned.	

<i>Maintain an active and effective Main Street program</i>	- Utilize the four-point strategies: 1) Economic Vitality, 2) Marketing & Promotions, 3) Organization, 4) Design & Appearance - Program the remainder of the side streets improvement projects into the CIP (COMPLETED) - Retain National Main Street Accreditation (COMPLETED)	Wake Forest Downtown, Inc. (WFD) held their annual retreat on 8.23.21 to focus on the annual plan of work. The four point strategy is incorporated, with each committee having key action items. Diversifying income outside of events is a key area of focus for the board. Downtown Development Manager attended Main Street Directors meeting as required for accreditation.	Plan of Work for Wake Forest Downtown, Inc. (WFD) was voted and approved 11.3.21 and all sub committees have held quarterly meetings during this period. Downtown Development Manager attended regional NC Main Street meeting 11.1.21.	Annual assessment packet was submitted January 2022. Downtown Development Manager attended NC Main Street Conference March, 2022. Committees have been actively meeting. Board Chair and Downtown Development Manager are working on internal changes to help align board member strengths with committee positions. Current focus is to strengthen committees through additional community volunteers.	
<i>Continue to monitor and evaluate downtown parking capacity</i>	- DFI will perform a parking study as part of their market analysis on the old SunTrust property. (COMPLETED) - Additional future studies will be done on an as needed basis as Downtown continues to grow.	DFI has worked closely with applicable staff for some feasible solutions. Staff recommendations will be presented to the WF Board of Commissioners (BOC or Board) in October.	The Suntrust redevelopment project's request for proposals is anticipated to be released to the development community in February 2022 after meetings with WFD, Downtown Business Alliance, public information sessions and Board of Commissioner consideration in January 2022.	Information sessions for Redevelopment at 353 South White Street were held with Wake Forest Downtown Inc., Downtown Business Alliance, and the general public in January 2022. BOC voted to proceed with redevelopment project with goal of private/public partnership for parking deck. RFP went live early February and proposals are due 4.29.22.	
<i>Continue to explore initiatives that provide expedient and seamless customer service</i>	Increase review fees for Express plan reviews; site and master plan. Have staff stay after hours to complete reviews. (COMPLETED)	Site and master plan review fees were increased effective July 1. The Planning Department does not offer express plan review and does not recommend providing that service due to the complexity of the review and staff capacities.	Completed next day inspections 99% of the time.	Completed next day inspections 99% of the time.	

	Inspections Department to maintain next day building inspections policy.	Completed next day inspections 99% of the time.			
TASK	NOTES	Q1 UPDATES JULY 2021 – SEPTEMBER 2021	Q2 UPDATES OCTOBER 2021 – DECEMBER 2021	Q3 UPDATES JANUARY 2022 – MARCH 2022	Q4 UPDATES APRIL 2022 – JUNE 2022
<i>Develop strategies to reach as many residential communities as possible with fiber.</i>	- Currently designing middle mile fiber network. - Working with Ting and exploring other partnerships for reaching neighborhoods from the middle mile. - Ting is currently installing fiber within a section of Heritage.	Ting continues to install fiber throughout the town for residential use. Ting has also brought services to downtown for commercial access to high speed fiber.	Ting continues to install fiber throughout the town for residential use.	Ting has completed the installation of fiber on all major thoroughfares. They are continuing to install fiber access to residences and businesses.	
<i>Provide programming and events as an economic driver to promote a sense of place, provide quality of life programming and attract new visitors and investment.</i>	- Promote the new Joyner Park Community Center as a regional facility for athletics, health & wellness, meetings and special events. - Bring in tournaments, pickleball – partner with the Factory and Greater Raleigh Convention and Visitors Bureau (GRCVB) -	Friday Night On White was held 9.10.21 and it was a great turnout with over 8,000 people. Downtown is consistently seeing over 100 events downtown each month between Farmers Market, Renaissance Centre, WF Chamber, and merchant sponsored events. This number is expected to continue to increase with the continued development downtown.	The Renaissance Centre (RC) presented 11 ticketed events this quarter. Seven of the performances were SOLD OUT! The Renaissance Centre is reaching new audience members by providing audio description for low vision guests during one of the performances of “The Odd Couple.” Audio description is a narrative service that describes to the visually	In this quarter, the Renaissance Centre hosted 11 performances, over 100 classes, 5 rentals, 10 meetings and 3 expos attracting over 4200 people to the downtown area. In addition, the 2022 Wake Forest Film Festival’s attendance was the largest ever, attracting filmmakers and film enthusiast from several states. PRCR Dept: basketball season concluded with no disruptions. PRCR Dept. Partnered with the Wake Forest Pickleball Club to host the	

	Develop a public/private partnership and get restrooms. Continue to offer and expand the diversity of programs offered at the Renaissance Centre and by the Parks, Recreation & Cultural Resources Department.	Wake Forest Downtown, Inc. Is hosting Spirits of Wake Forest again and 600 tickets sold out in less than two weeks. This prompted the committee to add an additional tour Saturday nights (100 more tickets) to help meet the demand. The Renaissance Centre presented two SOLD-OUT shows for the community during the 1st quarter. The Malpass Brothers and the Legacy Motown each brought fist-time visitors to Wake Forest as well as provided quality programming for the Town’s citizens.	impaired what a sighted patron is experiencing. Wake Forest Cares Holiday Kickoff event had a great turnout with approximately 8,000 in attendance throughout the day. It was an inclusive event with something for everyone and the merchants had extremely positive feedback. Lighting of Wake Forest was well attended with perhaps the largest crowd ever. PRCR Dept. Hosted the first outdoor <i>Halloween Boo Bash</i>. The event was held on Thursday, Oct. 21st, at E. Carroll Joyner Park, for children ages 12 and younger. Over 4000 citizens attended the event in 2021. In the past we averaged about 1000 for our indoor Halloween event. PRCR Dept: fall outdoor athletic leagues concluded with no disruptions Planning/PRCR Dept. Hosted Make a Difference Day at Taylor Street Park (October 23, 2021). PRCR Dept: Basketball leagues returned for the first time since COVID. There are 648 participants enrolled this year.	“Luck of the Green” Pickleball Benefit Tournament Friday-Sunday, March 11-13, at the Flaherty Park Pickleball Courts. Tournament proceeds will be used to make improvements to the Flaherty Park Pickleball Courts. 237 players registered for the tournament. PRCR Dept. Spring Leagues Registrations: Youth baseball/softball - 925 youth league registrants (we have returned to our pre-COVID average of over 900), we also have 14 adult softball teams and 7 adult kickball teams registered. Downtown Development did not host any events first quarter of 2022 but is gearing up for the return of Friday Night on White series beginning in April. .	
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Convert Owen Avenue to a shared festival street (PROJECT COMPLETED)					
Complete White Street Streetscape Expansion (Elm Avenue to Holding Avenue) (PROJECT COMPLETED)					
Continual evaluation of the effectiveness of individual programming and events as an economic driver and quality of life initiative	Continued fine tuning of events such as FNOW, Parade, Car Show, Mardi Gras, Dirt Day etc. to provide the optimal visitor experience and largest economic impact -Ongoing	The Charity Car Show was canceled in 2020 and 2021 due to COVID and in August 2021 WFD made the decision to not proceed with hosting again. Majority of merchants indicated that this was not a good sales day for them and that street closures made it difficult. WFD will continue to host Dirt Day, but hopes to explore partnerships with other events, such as a spring artisan market, to strengthen the overall event and spread it out throughout downtown. WFD is bringing back Spirits of Wake Forest, which is a great event that allows us to share the history of downtown. Patrons are encouraged to eat/shop/drink before and/or after their tours. Downtown Business Alliance is helping to tie into the event with a window decorating contest.	Wake Forest Cares Holiday Kickoff and Lighting of Wake Forest were both successful events that brought people downtown and had a positive economic impact. Feedback is being gathered from stakeholders, elected officials and visitors to be considered when planning begins for 2022. Plaid Friday, Small Business Saturday, and Holiday Open House were merchant focused events to help promote shopping local. A scratch off ticket was given away with any purchase and merchant discounts, mystery prizes and Downtown Dollars were offered as prizes. This type of marketing is working as our merchants are reporting increased sales and new customers.	No events were held first quarter 2022, however WFD has been hard at work planning a new event, Forest Fest. This event will incorporate some elements from Dirt Day, but also introduce historical components. This event will be held in partnership with the Town's Arbor Day Seedling Giveaway and the WF Guild of Artists' Spring Art Market.	

<i>Promote quality of life characteristics to attract and retain businesses and their employees</i>	• Maintain Parks, Recreation, and Cultural Resources Department national accreditation for the Commission for Accreditation of Park and Recreation Agencies (CAPRA). • Maintain Wake Forest Police Department as Commission international accreditation for Law Enforcement Agencies (CALEA). • Wake Forest Inspections Department to promote safety of houses and inspection standards during Building Safety month. (ONGOING) • Provide examples of diverse programming events and initiatives • Maintain and continue to expand park and greenway system.	Greenway construction plan design complete for Smith Creek Phase 2 and 3, as well as Dunn Creek Phase 4. Police Department (PD) continues to review and update policies for CALEA compliance. PD provided security for FNOW. PD increasing traffic patrols due to uptick in seriousness of traffic crashes. PD patrolling greenways on bicycle and ATV. PD directed traffic at area High Schools for the first week. PD has met with area children during routine patrol. Officers have let them see the functions of the patrol car and taken photos. PD staff is being featured on social media to introduce them to the public.	Police Department (PD) held National Night Out event. PD assisted with Halloween Boo Bash and patrolled neighborhoods during Halloween. PD worked security for WF Cares Holiday Kickoff. PD No Shave November fundraiser for the family of Knightdale Officer Cody Hagler PD Turkey Giveaway with over 628 turkeys given away. PD Shop with a Cop event.	WF Inspections Department is gearing up for its annual Building Safety Month Kickoff on April 30th at the Town and Country Hardware located in the Gateway Commons Shopping Center. PD hired Community Resource Officers that are now working in the community. PD installed speed signs in areas where complaints were received.	
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GOAL 2: Safe & Connected Community

STRATEGY: Provide opportunities for residents to become more involved in Town government

TASKS	NOTES	Q1 UPDATES JULY 2021 – SEPTEMBER 2021	Q2 UPDATES OCTOBER 2021 – DECEMBER 2021	Q3 UPDATES JANUARY 2022 – MARCH 2022	Q4 UPDATES APRIL 2022 – JUNE 2022
<i>Develop a Citizens Academy.</i>	- Recommended ending the current Planning Board Academy; April 2020 was the last session and a session in being held in September/October 2021. Communications Department to take the lead on developing and implementing the Academy (virtual and in-person sessions). Work with Planning and other departments. Anticipated launch; fall 2019. - Planning academy would tie in well with citizens academy, great to recruit for ABs, present projects to the board that are issues for them gives ideas for better service.	The Planning Department hosted a Planning Academy during the month of September. A Citizen’s Academy citizen survey was completed in Quarter 4 of 2021. The academy is currently in development and will be offered in the Spring of 2022	Planning is underway for a Citizen’s Academy to be rolled out in Spring 2022.	Spring rollout was postponed due to COVID. Rollout targeted for Fall 2022.	
<i>Educate citizens on volunteer opportunities</i>	Develop a video providing an overview of each advisory board over the next two years to help	Throughout September, Communications has used a variety of tools to encourage residents to	The RC has increased its volunteer data base and communicates with the volunteers several times a	Forty-two volunteers donated 142 hours of service to help the	

<i>(Expand 411 videos to include advisory board/commissions).</i>	with advisory board recruitment. Promote the volunteer opportunities including the Adopt-a-Trail, environmental programs, and other town events.	apply for current advisory board openings. We have also repeatedly emphasized the “Show Some Love” campaign and the opportunity for individuals, families, churches and civic groups to pick up litter along roadways. We are heavily promoting the October 23 Make a Difference Day and the volunteer opportunities associated with this event. We are currently promoting the WF Film Festival and are soliciting volunteers to judge films. In July, we shared info with the community about the array of volunteer opportunities offered by the Town and directed interested individuals to the online volunteer registration form at http://bit.ly/WFVolunteerOpportunities. Also in July, we used all our resources to help recruit volunteers for the July 4 Children’s Parade.	month. Volunteers are utilized for all Main Stage performances. In addition, the data base was used by ARTS Wake Forest to encourage volunteers to help with the Artisans Market. Volunteer videos related to litter pickup, proper recycling, and other opportunities continue to be promoted.	Renaissance Centre roll out the red carpet at 9 performances.	
<i>Create and promote programs and events that are multicultural and on the socioeconomic spectrum</i>	Survey citizens to gauge their interest and solicit their input concerning the kinds of programs and events in which they are interested.	Parks, Recreation and Cultural Resources (PRCR) surveys each family at the completion of our program (including camps and athletic leagues) throughout the year. This information	The Public Art Commission partnered with the PRCR Department on October 9 with a Celebration of the Arts. The free event offered art displays and art projects at the Alston-Massenburg Center.	The Arts For All series hosted the performance “Jackie Robinson” to a standing room only crowd at Alston-Massenburg Center to celebrate Black History Month. Gospel legend Pastor John P Kee delighted a full house at the	

	Based on results of survey, work to establish and refine programs and events.	is used by staff to address any issues or concerns and develop future programs. Downtown Development focuses on offering free programming that appeals to and attracts various demographics. The Public Art Commission (PAC) installed a new sculpture at the Alston-Massenburg Taylor Street Park. “Freedom: An Homage to Sojourner Truth.” This sculpture helps bring the neighborhood together and helps creates a sense of pride in the community. The RC was the host venue for the “How to Do Business” expo. The expo connected minority business owners with purchasing directors and project managers from area municipalities. The expo was designed to break down barriers that keep small business owners from reaching out to government agencies to do business.	Surveys utilized at WF Cares Holiday Kickoff and Lighting of Wake Forest provided valuable feedback, as well as praises. We continue to work hard to ensure that our programming offers something for everyone. PRCR Dept. hosted the following events for the holiday season: Calls from Santa” - Thursday, Dec. 2, from 6-8 p.m. 265 children received calls this year. Snowball Dance for individuals with disabilities – Friday, Dec. 3, 6:30pm – 8:30pm at the Wake Forest Community House, there were 25 participants and 20 volunteers this year Brunch with Santa: Sunday, Dec. 5, from 10:30am – 12noon at Joyner Park Community Center. We had 30 families register for the brunch this year. Cinema at the Center Saturday, Dec. 11, at the Joyner Park Community Center. The featured film will be “Frozen II” (PG). Admission was free. There were 97 attendees.	Renaissance Centre at the Shades of Gospel Celebration in February. PRCR Dept. hosted a Black History Expo at the Alston Massenburg Center in February. There was a total of 195 participants for these events.	
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<i>Foster public/private partnerships in an effort to encourage affordable/workforce housing.</i>	• Work with developers to identify possible areas for housing and any resulting public infrastructure needs. • Develop policy on fee waivers for affordable/workforce housing. • Review and possibly change zoning classifications in areas conducive to affordable/workforce housing.	The creation of the Town’s first Affordable Housing Plan is currently underway. This Plan will identify the most effective ways to implement affordable housing. Tentative adoption is winter/spring 2022.	The Northeast (NE) Area Plan was adopted in December 2021. During the draft stage, Planning ensured that affordable housing concerns or suggestions mentioned during NE Area Plan development were correlated into the plan. Planning staff is currently reviewing the draft community plan and ensuring the draft affordable housing plan correlates with any community plan recommendations.	The Town is currently preparing a Housing Affordability Plan that will outline steps to expand affordable/workforce housing.	
<i>Reduce accumulation of litter along roadways throughout Wake Forest</i>	• Work with construction sites, large trucks, and residents to educate on the importance of tarping loads. • Proactively collect and track litter collection. • Develop and maintain an educational campaign to reduce litter.	PD patrol construction sites and routine patrols to enforce littering campaign Public Works pick up litter along town streets and NCDOT streets. PW is also working with Communications to educate residents on recycling contamination.	Town staff has continued to hold a 98 Bypass cleanup – about 54 bags picked up in August and November cleanups. Litter Kit rentals continue to go out and we have had several large groups do cleanups. Make a Difference Day removed approximately 4,000 lbs of litter from the Northeast area of Town. Group cleanups, Town cleanups, and litter kit rentals will continue.	Presented year one results of” Show Some Love” Litter campaign to BOC. 98 Bypass “Adopt a Highway” cleanup in February resulted in 22 bags of litter collected. In February, staff held quarterly cleanup along Highway 98.	

STRATEGY: Facilitate the installation of development related infrastructure through the use of innovative technologies and streamlined processes

TASKS	NOTES	Q1 UPDATES JULY 2021 – SEPTEMBER 2021	Q2 UPDATES OCTOBER 2021 – DECEMBER 2021	Q3 UPDATES JANUARY 2022 – MARCH 2022	Q4 UPDATES APRIL 2022 – JUNE 2022
Implement ‘Dig Once’ Program	- Add conduit during open trenching. - Update road specifications and details to include conduit for the Town	Electric Department continues to add conduit to any new subdivision’s road crossing.	Ongoing	Ongoing	
Reduce recycling fees	- Develop a new residents guide to trash, recycling and yard waste pickup. (COMPLETED) - Work with current contractor to spot check possible violations of recycling guidelines. (ONGOING) - Provide volunteer opportunities for citizens in recycling and stormwater cleanup.	Working on an updated Solid Waste Guide to come out in Nov. Notification tags are left on recycling carts that are overfull or contain non-recyclable materials. Litter kits continue to get checked out. Residents are assigned streets or streams to clean up around Town.	Solid Waste Guide will be released in January 2022. Continuing recycle cart tagging/education. Upgrading residents to larger recycle carts if needed. Proper recycling 411 video continues to be promoted.	Solid Waste guides have been mailed to residents. Continuing tagging of recycle carts/educating residents and upgrading to larger carts.	
Maintain Town tree canopy at 45% or greater	- Contract with non-profit organizations to plant trees on private property. - Revise Unified Development Ordinance (UDO) to encourage more tree save areas.	Non-profit partnerships for tree planting has been put on hold during pandemic. A new survey shows that the town is still in good standing with tree canopy at 46%.	Seasonal tree planting underway 220 trees being planted.	Included within the draft Community Plan are several action items related to the Town’s tree canopy, such as to ensure that the UDO update supports the Town’s established tree canopy goal.	

	• Explore the use of grants to purchase forested areas within the town limits. • Increase the required Open Space for new development in the UDO • Provide development incentives for tree preservation above what is required • Create and market the tree memorial/honorary tree program				
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Goal 3: Values-Based Organizational Culture

STRATEGY: Encourage employees to express ideas and collaborate across departments

TASK	NOTES	Q1 UPDATES JULY 2021 – SEPTEMBER 2021	Q2 UPDATES OCTOBER 2021 – DECEMBER 2021	Q3 UPDATES JANUARY 2022 – MARCH 2022	Q4 UPDATES APRIL 2022 – JUNE 2022
Establish small focus groups of employees across departments.	- Survey Employees for feedback – employee input a unit component of strategic planning; Start/Stop/Continue survey a good way to see what employees would like their supervisors to start doing, stop doing and continue doing. - Utilize the Local Government Workplace Initiative (LBWI) at UNC Chapel Hill to facilitate employee empowerment and voice.	Informed staff that the Board of Commissioners is currently in the process of updating the Town’s Strategic Plan. Staff was also informed that part of the strategic plan framework includes developing an organizational mission statement and articulating organizational values that guide how employees work with each other and the community. The Strategic Plan: Employee Mission and Values Survey was launched on September 15, 2021, and staff were informed that the Board wants their input, which will be considered and incorporated into the final Strategic Plan to be adopted by the Board.	No activity this quarter.	Department Directors and Managers reviewed a draft Remote Work Policy in January and February 2022 and provided suggested changes. Remote Work Policy with a March 1, 2022, launched in PowerDMS for employees to review and sign acknowledgment of receipt. Training was provided for eligible staff. Board approved Strategic Plan shared with Town staff.	
Work to decentralize processes where applicable for greater	Review current practices to ensure empowered across the organization and at the appropriate levels to make decisions and take action in an	All members of Building Inspections, Planning and Engineering will get to know each other and their respective positions over the next eight months to focus on efficiency.	Team building events happened within individual departments and across the leadership team this quarter. Coming together to articulate values is helping	No activity this quarter.	

<i>efficiency and to create more employee voice.</i>	effort to be timely and responsive to citizens.		create opportunities for sharing employee feedback.		
STRATEGY: Provide skills and resources to all for employee upward mobility within this organization and professional growth					
TASK	NOTES	Q1 UPDATES JULY 2021 – SEPTEMBER 2021	Q2 UPDATES OCTOBER 2021 – DECEMBER 2021	Q3 UPDATES JANUARY 2022 – MARCH 2022	Q4 UPDATES APRIL 2022 – JUNE 2022
<i>Ensure succession plan prepares staff to take over at least one year in advance; Department Directors, Superintendents, and Division Line Managers.</i>	Each Department Director recommends a pool of internal candidates for succession planning purposes to the Town Manager. Human Resources and the Department Director would develop an assessment center to identify the top candidate(s) who demonstrates the ability to fill the position on a temporary and possibly permanent basis.	No activity this quarter.	Ongoing training opportunities were offered to staff including participation in Fundamentals of Supervision Certificate Program offered by Catapult.	Departments encouraged to continue opportunities for leadership training and development and cross training.	
<i>Develop a Leadership Academy</i>	- Implement within the next two years. - Application driven.	The Leadership Academy Committee is looking at the North Carolina League of Municipalities On-Line Municipal Leadership Program as a training option.	No activity this quarter.	No activity this quarter.	

STRATEGY: Ensure Wake Forest is a competitive employer in the local government job market

TASK	NOTES	Q1 UPDATES JULY 2021 – SEPTEMBER 2021	Q2 UPDATES OCTOBER 2021 – DECEMBER 2021	Q3 UPDATES JANUARY 2022 – MARCH 2022	Q4 UPDATES APRIL 2022 – JUNE 2022
Compensation studies and benefits review	- A third of the positions are studied annually. - Salary table adjustments are made based on the results of the study. - Benefits are reviewed annually by a third-party benefits consultant.	Human Resources Director is in the process of implementing the Town’s Pay and Classification Study. The Town remains an active client of the A.J. Gallagher and participant in the North Carolina Health Insurance Pool.	The annual Pay and Classification Study is underway and employee interviews are being scheduled for the first and second weeks in January 2022. Staff has begun the process of reviewing renewal plans and optional benefit plans for the 2022-23 benefits year. The Town remains an active client of the A.J. Gallagher and participant in the North Carolina Health Insurance Pool (NCHIP). The Town continues to build its reserve balance.	In January 2022, based on the Town’s responses from Gallagher’s 2021 Benefits Strategy & Benchmarking Survey, the Town of Wake Forest was selected as a 2021 Best-in-Class Employer. Over 4000 organizations across the U. S. participated in Gallagher’s 2021 Benefits Strategy & Benchmarking Survey. The Town was one of 439 organizations to be selected as a Best-in-Class Employer. Gallagher’s Best-in-Class awards recognize employers that excel in supporting their employees’ physical, emotional, career and financial wellbeing for better organizational outcomes. Annual Pay and Classification Study is complete. Recommendations will be shared with the Town Manger and Chief Financial Officer to help develop overall compensation plan for the upcoming FY 2022-23 budget. Staff has started planning for the Town’s annual Benefits Open Enrollment which will be held in May 2022.	

				Staff continues to participate in national and local pay and classifications surveys.	
<i>Enhance employee experience</i>	• Staff explores non-monetary incentives such as the wellness benefits, local discounts, and employee group competitions. • Provide classes on personal finances and home buying. • Family Planning; Wills, Life Coaching, etc. • Toastmasters • Add a photo montage of employees working/volunteering throughout the year during the annual Christmas luncheon.	Human Resources staff continue to look for incentives that will enhance the employee experience. During the month of September, the Wellness Committee launched a Wake Forest Stronger Virtual Wellness Challenge. Plans in place to hold a drive by Christmas Luncheon. Photos will be shared with staff leading up to and after the luncheon. An employee lunch was held on September 16th to show appreciation to town staff for the exemplary service to our community during the Covid-19 pandemic. A Covid-19 Vaccine Incentive Program was developed to encourage staff to obtain the COVID-19 vaccine. Incentives consist of \$500 for full-time employees and \$250 for part-time employees who receive the full doses of the vaccine.	October is the month that we set aside to highlight the Town's Strategic Plan Core Values. Each core value is important and reflects our dedication to fostering a collaborative organizational culture that promotes teamwork and celebrates the achievement of common goals. We highlighted a different core value each week throughout the month of October. An Employee Holiday Workspace Decorating Contest was held during the month of December. Winners were drawn and announced on Thursday, December 9, 2021. The Employee Holiday Christmas Luncheon was held on December 10, 2021. Box lunches were ordered for employees who picked them up in the Town Hall Ground Floor Meeting Room. Gifts were purchased for all Town staff. There will be a Blood Drive held in the Town Hall parking lot on Friday, December 17, 2021.	A Valentine's Blood Drive was held on February 14, 2022. A Winter Wellness Challenge was held throughout the month of February 2022. BWELL Bingo was the name of the challenge and employees had to towards completed the various wellness tasks on the BWELL bingo board. Biometric Screening Clinic held on March 23, 2022.	

GOAL 4: Fiscal Strength



STRATEGY: Maintain and Improve the Town’s Bond Rating

TASK	NOTES	Q1 UPDATES JULY 2021 – SEPTEMBER 2021	Q2 UPDATES OCTOBER 2021 – DECEMBER 2021	Q3 UPDATES JANUARY 2022 – MARCH 2022	Q4 UPDATES APRIL 2022 – JUNE 2022
Update debt issuance plan and model accordingly.	- Provide relevant data to financial advisors on current and planned debt. - Ensure budgets are within the model and debt policy.	Closed on rolling stock (\$798,510) IPA on September 15 with Truist Bank – 3 years - .89%	Once list is finalized for referendum, debt model will be updated later in 2022. No debt issued this quarter.	Meeting held with our financial advisors in March. Updating the debt model has begun in preparation for FY2022 Bond Referendum. Closed on police vehicle IPA (\$964,750) on March 31 with Benchmark Community Bank – 3 years – 1.25%.	
Assess upcoming bond needs and prepare for tentative referendums in November 2022 and 2024 respectively	- Departments have identified potential needs. - Preliminary list shared with BOC at their February work session - Refine list and receive further input from the BOC. - Gather cost estimates for final projects and enter into debt model.	Meetings continue with project managers to finalize list of projects for November 2022 referendum. CIP update underway and requests due October 8. Plans to present list of projects to Board at a future work session or annual planning retreat to determine prioritization and funding amounts. Next steps will be to update debt model and determine affordability.	CIP document development underway and to be delivered to Board in January 2022. At the upcoming Board retreat, projects will be discussed with objective of receiving priorities for November 2022 referendum.	Financial advisors will come to the May work session to present debt capacity for the upcoming referendum. Preliminary conference with LGC scheduled for May 16.	

<i>Receive AAA from Moody's.</i> (PROJECT COMPLETED)	• Ensure policies and practices are within the standards set by Moody's.	Complete! N/A	Completed. N/A	Complete.	
<i>Maintain adequate reserves in accordance with Local Government Commission guidelines and Board of Commissioners.</i>	• Policy has been adopted by BOC setting reserve levels. • Each budget is analyzed to ensure it is within policy threshold set by the BOC.	Finalizing FY 21 financial results and Annual Financial Report.	FYE results to be presented at December regular meeting. Fund balance and reserves are in accordance with policy guidelines.	Complete.	

STRATEGY: Maintain Financial Stability of Town

TASK	NOTES	Q1 UPDATES JULY 2021 – SEPTEMBER 2021	Q2 UPDATES OCTOBER 2021 – DECEMBER 2021	Q3 UPDATES JANUARY 2022 – MARCH 2022	Q4 UPDATES APRIL 2022 – JUNE 2022
<i>Meet the requirements for submission of annual budget, Annual Financial Report, and PAFR.</i>	- Review annual documents to ensure standards are being met before submission for annual review. - Budget has received GFOA award five consecutive years. - Comprehensive Annual Financial Report has received GFOA award 31 consecutive years. - PAFR has received four consecutive GFOA awards.	FY 2021- 2022 Annual Operating Budget submitted in September for the Government Finance Officers Association award consideration.	FYE 2021 Annual Comprehensive Financial Report (ACFR) to be submitted to GFOA in December for award consideration. PAFR to be submitted in January.	PAFR submitted on schedule.	
<i>Update the Electric Rate Study.</i> (PROJECT COMPLETED)	- Update every three to five years. - Funds included in FY 20 budget for study update	Complete. Rate adjustments effective September 1, 2021.	Complete.	Complete.	
<i>Conduct analysis of Wake Forest Fire Department (WFFD) becoming a Town Department. (PROJECT COMPLETED)</i>		Complete. Conducting follow up after one year to address certain items.	Review of follow up items completed and addressed. The Fire Department was awarded an ISO 1 designation in November 2021.	Complete.	

STRATEGY: Assess Development Agreements for Public/Private Partnerships

TASK	NOTES	Q1 UPDATES JULY 2021 – SEPTEMBER 2021	Q2 UPDATES OCTOBER 2021 – DECEMBER 2021	Q3 UPDATES JANUARY 2022 – MARCH 2022	Q4 UPDATES APRIL 2022 – JUNE 2022
<i>Create policies for affordable/workforce housing funding.</i>	- Submit policies for review by BOC that address fee waivers and at what threshold. - Submit policies for review by BOC that address the threshold at which the Town will consider contributing to an affordable housing project (and at what level of funding).	The Affordable Housing Plan process is underway. This Plan will identify housing needs as well as strategies to address. Winter 2022 adoption is anticipated. Project kicked off in July, stakeholder meeting held in August, and survey was released in September.	Affordable housing recommendations and needs mentioned in the Northeast Area Plan and Town-wide Community Plan were compiled and incorporated into the Affordable Housing Plan this quarter to ensure efficiency during implementation. Affordable Housing Plan is still on target to be adopted Winter 2022. In November, National Make a Difference Day occurred as a kick-off event for our Housing Rehabilitation Grant Program. Porches were painted, and landscaping and other beautification projects occurred. Over 90 people participated. The program will help residents make repairs to homes in the northeast community.	The Town is currently preparing a Housing Affordability Plan. Adoption is tentatively scheduled for Q4.	
<i>Create policies to partner with developers to meet long-term infrastructure goals in conjunction with the Comprehensive Transportation Plan (CTP).</i>	- Allow the developers to build the infrastructure with the Town providing payment to the developer to help reduce the cost of new roads and/or improvements to infrastructure. - Helps keep cost down, they are already mobilized, set up development agreement for a maximum amount the Town will contribute.	The Board of Commissioners approved a resolution allowing the Town Manager to execute a reimbursement agreement with Endeavor Charter School. Offsite improvements expected to be completed November 2021.	Offsite improvements for Endeavor Charter School were completed in November 2021. Planning and Engineering staff are working on a public/private partnership to widen South Franklin. If successful, the work would begin next fiscal year.	Planning and Engineering staff continue to work on a public/private partnership to widen South Franklin. If successful, the work would begin next fiscal year. A formal evaluation to occur as part of the UDO update.	



Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-449-

Submitted by: Sherry Scoggins

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Wake County Tax Release

Recommendation:

Item Summary:

ATTACHMENTS

- [TXREP-WF-APRIL2022.pdf](#)



Board of Commissioners
P.O. Box 550 • Raleigh, NC 27602

TEL 919 856 6180
FAX 919 856 5699

SIG HUTCHINSON, CHAIR
SHINICA THOMAS, VICE-CHAIR
VICKIE ADAMSON
MATT CALABRIA
MARIA CERVANIA
SUSAN EVANS
JAMES WEST

April 5, 2022

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 April 4, 2022, 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 dark ink, appearing to read "Yvonne Gilyard".

Yvonne Gilyard
Deputy Clerk to the Board
Wake County Board of Commissioners

Tax Committee Meeting: 03/17/2022

Board of Commissioners Meeting: 04/04/2022

TO: Wake County Board of Commissioners and Town Board of Wake Forest

FOR: Consideration of Requests for Adjustments, Rebates, and/or Refunds of Penalties

Approved by:

The Wake County Tax Committee has approved the following policy to recommend relief of the late listing and/or vehicle penalties when at least one of the following conditions apply:

1. New to North Carolina
2. First time listing
3. Previous year listing on time
4. Omitted item(s) from listing - Current/previous listing on time
5. Military Deployment
6. Provided proof of timely listing

Relief Codes:

Item #	Taxpayer(s)	Description Jurisdiction	Account # / Year For Payment Status	Late List Appealed	Appeal/Request Type	Recommendation	Relief Code
18059	1-800-PACK-RAT LLC 11640 NORTHPARK DR STE 300 WAKE FOREST NC 27587-3302	IRP VEHICLES WAKE FOREST	0006893666 2021 Paid in Full	\$5,943.57	Late List Penalty	Relief	

This List Requires Board Action

Tax Committee Members: Natasha Baldwin, City Of Raleigh

Kim Lorbacher, Wake County Finance

Jessica Murphy-Rhem, Town Of Cary

Marcus Kinrade, Tax Administrator



WAKE COUNTY TAX ADMINISTRATION

Rebate details
2/1/2022 - 2/28/2022

WAKE FOREST

DATE
03/01/2022
TIME
11:48:50 AM
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
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WAKE FOREST (Not In District)

BUSINESS ACCOUNTS

809092	653.09	0.00	0.00	65.31	0.00	718.40	02/24/2022	0006910864	2021	2021	000000	WELL BEAN COFFEE & CRUMB LLC
808063	154.69	0.00	0.00	15.47	0.00	170.16	02/14/2022	0006840970	2021	2021	000000	WAKE FOREST HOME REPAIR LLC
807052	154.69	0.00	0.00	15.47	0.00	170.16	02/03/2022	0006816510	2021	2021	000000	DAVID JAMES GROUP, LLC

Subtotal for

BUSINESS ACCOUNTS	962.47	0.00	0.00	96.25	0.00	1,058.72	3 Properties Rebated
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BUSINESS REAL ESTATE ACCOUNTS

809341	9,720.14	0.00	0.00	0.00	0.00	9,720.14	02/28/2022	0000469737	2021	2021	002000	PLEASANTS FAMILY LLC
809341	18.43	0.00	0.00	0.00	0.00	18.43	02/28/2022	0000469737	2021	2021	000000	PLEASANTS FAMILY LLC
809338	18.10	0.00	0.00	0.00	0.00	18.10	02/28/2022	0000469737	2021	2020	000000	PLEASANTS FAMILY LLC
809339	9,548.88	0.00	0.00	0.00	0.00	9,548.88	02/28/2022	0000469737	2021	2020	000050	PLEASANTS FAMILY LLC

Subtotal for

BUSINESS REAL ESTATE ACCOUNTS	19,305.55	0.00	0.00	0.00	0.00	19,305.55	4 Properties Rebated
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INDIVIDUAL PROPERTY ACCOUNTS

808589	125.40	0.00	25.00	0.00	0.00	150.40	02/18/2022	0006950007	2022	2021	000000	VICKERS-YOKE, MICHELLE LYN
809209	100.31	0.00	25.00	0.00	0.00	125.31	02/28/2022	0006950593	2022	2021	000000	LEUNG, RICHARD
807307	44.76	0.00	0.00	0.00	0.00	44.76	02/04/2022	0006863687	2021	2021	000000	BOYD WILLIE GRAY III
807179	3.88	0.00	0.00	0.39	0.00	4.27	02/04/2022	0006802009	2021	2021	000000	BLAKENEY, ERIC ANDREW
807181	4.01	0.00	0.00	0.00	0.00	4.01	02/04/2022	0006898462	2021	2021	000000	REDA, RANDY ALAN



WAKE COUNTY TAX ADMINISTRATION

Rebate details
2/1/2022 - 2/28/2022

WAKE FOREST

DATE 03/01/2022
TIME 11:48:50 AM
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
808590	283.40	0.00	25.00	0.00	0.00	308.40	02/18/2022	0006950000	2022	2021	000000	VICKERS-YOKE, MICHELLE LYN

Subtotal for

INDIVIDUAL
PROPERTY 561.76 0.00 75.00 0.39 0.00 637.15 6 Properties Rebated

ACCOUNTS

TOTAL
WAKE 20,829.78 0.00 75.00 96.64 0.00 21,001.42 13 Properties Rebated for the District/CityFOREST (Not
In District)

TOTAL FOR

CITY
WAKE 20,829.78 0.00 75.00 96.64 0.00 21,001.42 13 Properties Rebated for the City

FOREST



WAKE COUNTY TAX ADMINISTRATION

Rebate details
2/1/2022 - 2/28/2022

WAKE FOREST

DATE 03/01/2022
TIME 11:48:50 AM
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
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Grand Total:	42,705.53	54.79	1,425.00	5,169.66	0.00	49,354.98		140	Properties Rebated for All Cities			
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Board of Commissioners Agenda Item Report

Agenda Item No.: 2021-464-

Submitted by: Sherry Scoggins

Submitting Department: Administration

Meeting Date: April 19, 2022

SUBJECT

Commissioner Reports

Recommendation:

Item Summary:

ATTACHMENTS

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