

**ZEBULON  
BOARD OF COMMISSIONERS  
AGENDA  
AUGUST 5, 2024  
6:00pm**

**1. PLEDGE OF ALLEGIANCE**

**2. APPROVAL OF AGENDA**

**3. PROCLAMATION**

**4. PUBLIC COMMENT**

All wishing to speak must sign up prior to 5:50pm. The comment period will be no longer than 15 minutes with speakers having three minutes each to speak. No speaker can speak on a public hearing item or any item that would need to be discussed under Closed Session. Speakers cannot give their minutes to another speaker. If you would like to submit comments to be read into the record at the meeting, please send comments, of 400 words or less, to Stacie Paratore at [sparatore@townofzebulon.org](mailto:sparatore@townofzebulon.org) by 3:00pm on June 3, 2024.

**4. CONSENT AGENDA**

*A. Minutes*

- i. March 4, 2024 – regular meeting
- ii. March 28, 2024 – work session
- iii. April 8, 2024 – joint public hearing
- iv. April 18, 2024 – work session
- v. May 6, 2024 – regular meeting
- vi. May 9, 2024 – work session

*B. Finance*

- i. Wake County Tax Report – April 2024
- ii. 2024 Budget Amendment Rollovers – Ordinance 2025-01
- iii. FY' 24 Donations and Grants Rollovers – Ordinance 2025-02

*C. Parks and Recreation*

- i. United Arts Council Grant – Ordinance 2025-03

*D. Fire*

- i. Fire Station 2 – Capital Project Fund – Ordinance 2025-04 and Ordinance 2025-05

**5. NEW BUSINESS**

*A. Community and Economic Development*

- i. Strategic Plan*

**B. Fire Department**

- i. Memorandum of Understanding*
  - a. Wake County
  - b. Johnston County
- ii. Fire Engine Replacement Appropriation – Ordinance 2025-06
- iii. Fire/EMS Station Design Professional Services Agreement

**C. Parks and Recreation**

- i. Sustainability Board

**6. OLD BUSINESS**

**A. Planning**

- i. 901 Mack Todd Road – Conditional Zoning – Ordinance 2025-07

**B. Parks and Recreation**

- i. Gill Street Park - DEQ

**C. General**

- i. Reimbursement of Expenses for Interim Town Manager

**7. BOARD COMMENTS**

**8. MANAGERS REPORT**

**9. CLOSED SESSION**

As Allowed Per NC General Statute § 143-318.11

- a. Property Acquisition of Property located at 2900 Zebulon Road, owned by Stephen Mitchell and Connie Brayboy for the purpose of possible conservation.
- b. Town of Zebulon v. Mayo et al. / Case #21-CVS-015054-910 , Wake County
- c. Deacon Development Group, LLC v. Town of Zebulon / Case #24-CVS-020692-910
- d. Personnel Discussions

**10. ADJOURN**

**Zebulon Board of Commissioners**  
**Minutes**  
**March 4, 2024**

Present: Mayor Glenn York, Quentin Miles, Amber Davis, Jessica Harrison, Shannon Baxter, Beverly Clark, Joe Moore-Town Manager, Lisa Markland-Human Resources Director, Chris Ray-Public Works, Bob Grossman-Police, Wayne Dupree-Fire, Sheila Long-Parks & Recreation, Bobby Fitts-Finance, Michael Clark-Planning, Kaleb Harmon-Communications, Eric Vernon-Town Attorney

Mayor York called the meeting to order at 6:10pm.

**PLEDGE OF ALLEGIANCE**

The pledge of allegiance was led by Commissioner Clark.

**APPROVAL OF AGENDA**

Mayor York moved Ordinance 2024-35, Resolution 2024-18 and Ordinance 2024-36 from consent to New Business.

Commissioner Baxter asked to pull the closed session minutes and move them to the March 28, 2024 work session.

Commissioner Baxter asked to move the Board Comments after the Managers Report.

Commissioner Baxter made a motion, second by Commissioner Harrison to approve the agenda as amended. There was no discussion and the motion passed unanimously.

**SCHOOL RECOGNITION**

Mayor York recognized student Mary Weathers Gentel and teacher Zachary Parchmenko both from Zebulon Middle School.

**PROCLAMATIONS**

Commissioner Baxter read the Proclamation for Women's History Month

**PRESENTATION**

Bobby Fitts spoke about the Strategic Plan Grant process.

Each group spoke about who they were and how they would use the funds if awarded:

- Preservation Zebulon
- Brown Bag Ministry of Wendell
- Positive Attitude for Life
- East Wake Education Foundation
- Zebulon Shrine Club
- James E. Shepard School Alumni Association
- The North Carolina Community of Coalitions

**PUBLIC COMMENT**

No one signed up to speak.

## **CONSENT**

### *A. Finance*

Commissioner Harrison made a motion, second by Commissioner Baxter to approve the Wake County tax report for December 2023. There was no discussion and the motion passed unanimously.

Commissioner Harrison made a motion, second by Commissioner Baxter to approve Ordinance 2024-34 – vehicle repairs – Appropriation of insurance proceeds. There was no discussion and the motion passed unanimously.

## **OLD BUSINESS**

### *A. Planning*

#### *i. 321 Hospital Road – Ordinance 2024-37*

Adam Culpepper presented the zoning map amendment request for 321 Hospital Road to rezone the .34 acres from Office Institutional (OI) to General Commercial (GC).

The standards under section 2.2.25.J for a rezoning were:

1. Health, Safety and Welfare
2. Appropriate for location
3. Reasonable in the public interest
4. Other relevant factors

The public hearing notification process was detailed. The zoning map and future land use plan was shown. The Planning Board recommended approval at their February 12, 2024 meeting.

Commissioner Baxter asked about details on the use type of the business.

Michael Germano explained the owners wished to use the business to import and export goods that would be sold elsewhere.

Commissioner Clark made a motion to approve 321 Hospital Road – Ordinance 2024-37. Motion died for lack of a second.

Commissioner Baxter made a motion, second by Commissioner Miles to table 321 Hospital Road – Ordinance 2024-37 to the April 1, 2024 meeting.

Commissioner Harrison explained she needed more clarification and time to understand the future land use plan and the plans for the property.

There was no further discussion and the motion passed with a vote 4 to 1 with Commissioners Miles, Baxter, Davis and Harrison voting in favor and Commissioner Clark voting in opposition.

*B. General*

i. Board Appointments

Each applicant was given three minutes to speak about their reasons for wanting to serve on an appointed board. Those who spoke were David Field, Rufus Wilson, Jr., Kyle Adams, Niya Moton, Marcus Bennett and Scott Carpenter.

Lisa Markland read comments submitted by Latoya Carter, Sylvia Wheeler, Dieva Hill, and Wendell Holden. Kyla Virden asked to have her application withdrawn.

Africa Privette was not present and did not submit comments.

The votes were done my ballot vote. Lisa Markland collected the ballots and there were write-in votes. Staff explained the Board would need to decide if they were willing to accept write-in votes.

Commissioner Miles made a motion, second by Commissioner Baxter to allow write-in votes. There was no discussion and the motion passed with a vote 3 to 2 with Commissioners Miles, Baxter and Davis voting in favor and Commissioners Harrison and Clark voting in opposition.

Lisa Markland read the voting results:

Planning Board

Kyle Adams, Niya Moton and George Roa who was a write in candidate.

Parks and Recreation Advisory Board.

David Field and Marcus Bennett

Lisa Markland stated there was a write-in ballot for Rufus Wilson, Jr. Commissioner Miles made a motion, second by Commissioner Baxter. Commissioner Harrison asked if Rufus Wilson, Jr. was interested in serving on the Board of Adjustment. Lisa Markland explained his application only indicated interest in serving on the Planning Board and Parks and Recreation Advisory Board. There was no further discussion and the motion passed with a vote 3 to 2 with Commissioners Baxter, Miles and Davis voting in favor and Commissioners Clark and Harrison voting in opposition.

Lisa Markland read the ballot results.

Board of Adjustment

Sylvia Wheeler was appointed as an in-Town regular member

Scott Carpenter was appointed as an in-Town alternate member.

There were not enough votes for the third opening.

Commissioner Miles made a motion, second by Commissioner Davis to vote again for the Board of Adjustment appointment for the in-Town opening. There was no discussion and the motion passed with a vote 3 to 2 with Commissioners Miles, Davis and Baxter voting in favor and Commissioners Harrison and Clark voting in opposition.

Rufus Wilson, Jr. was asked if he was interested in serving on the Board of Adjustment and he stated he was not interested.

Mayor York stated there would be a 10-minute break.

The meeting reconvened at 7:38pm.

## **NEW BUSINESS**

### *A. Finance*

#### *i. Auditor Recommendation*

Bobby Fitts presented the process for Request for Proposal (“RFP”) for the audit and stated the Town received three responses to the RFP from Mauldin & Jenkins, LLC, Martin Starnes & Associates, CPA’s and Thompson, Price, Scott, Adams & Co. Staff recommended Martin Starnes and spoke about the scoring criteria and results.

There was discussion about single audits and how federal funds required a single audit due to the rigorous process. Examples of grants that could require additional programs were detailed.

Commissioner Baxter asked about the duration of the auditor contract. Bobby Fitts explained the standard contract was for three years.

Commissioner Baxter asked if language could be added to the contract where it would be breached if the audit was late. Eric Vernon stated there would be a performance deadline in the contract. The contract had a deadline of October 31.

Commissioner Clark made a motion, second by Commissioner Harrison to approve a three-year contract with Martin Starnes & Associates, CPA’s beginning the fiscal year ending June 30, 2024. There was no discussion and the motion passed unanimously.

#### *ii. Strategic Plan Grant Funding Policy*

Kaleb Harmon reviewed the current Strategic Plan Grant Funding Policy and how the non-profits were made aware of the grant.

Commissioner Baxter asked if the 501(c)(3) organizations were based in Zebulon. Kaleb Harmon explained they needed to be serving the Zebulon community for the past two years.

Commissioners Miles stated most non-profits were struggling in their first two years and to look at the policy to help them sooner.

The Board would discuss feedback from the non-profits at the March work session.

### *B. Parks and Recreation*

#### *i. Facility Use Request – 8Kickoff Race*

##### *a. Resolution 2024-19*

Sheila Long presented the request to use Town Hall for the Boys and Girls Club 8K Kickoff race. The event was scheduled for September 7, 2024 and there was a request for a fee waiver.

The routes for both the 3k and 8k were shown. The route kept participants off Arendell Avenue, but required temporary closures of several streets within, and adjacent to the Wakelon Heights neighborhood.

The cost to the Town was estimated to be \$1,146.70.

John Hanlon, a Boys and Girls Club representative, spoke about what was planned for the event. Commissioner Baxter expressed safety concerns about there not being sidewalks on the entire race route. Mr. Hanlon stated there would be volunteers and the Police Department would be along the route. There were more details about safety precautions being taken during the race.

Bob Grossman spoke about the safety and traffic measures that were taken at the race last year. There would be message boards along the race to caution drivers about the race.

Commissioner Baxter made a motion, second by Commissioner Miles to table the topic to the April meeting until the applicant had the opportunity to discuss everything the Town was asking for with their attorney. There was no discussion and the motion passed with a vote 4 to 1 with Commissioners Davis, Harrison, Miles and Baxter in favor and Commissioner Clark voting opposed.

ii. Budget Amendment – Athletics – Ordinance 2024-35

Commissioner Baxter asked about the \$20,000 increase for youth leagues.

Sheila Long explained there was a 40% increase in athletics. Staff asked the Board to recognize the increased revenues and then allocate to part-time staff and uniforms.

Commissioner Baxter made a motion, second by Commissioner Davis to approve Ordinance 2024-35. There was no discussion and the motion passed unanimously.

C. Public Works

i. Authorize Public Auction of Knuckle boom truck – Resolution 2024-18

Commissioner Baxter asked if there was a reserve set for the knuckle boom truck. Chris Ray explained staff's estimate for the knuckle boom was greater than \$30,000 and must be approved by the Board to sell it.

Commissioner Harrison made a motion, second by Commissioner Clark to approve Resolution 2024-18. There was no discussion and the motion passed unanimously.

ii. Commissioner Public Works Emergency Generator Replacement – Ordinance 2024-36

Commissioner Miles asked what would happen to the old generator. Chris Ray stated it would be added to portable fleet and would be used for special events.

Commissioner Baxter had questions about value engineering and the difference in costs. Chris Ray explained the bids received exceeded the project's budget. The contractor recommended suggestions to modify to lower costs and staff spoke about those changes. There was detailed information given about the installation costs.

Commissioner Clark made a motion, second by Commissioner Miles to approve Ordinance 2024-36. There was no discussion and the motion passed unanimously.

### **MANAGER'S REPORT**

Michael Clark gave a monthly development update.

Bobby Fitts reported the following budget transfers:

#### **Police:**

Moved \$10,000 from Part-time Salaries to Salaries (Overtime), Moved \$2,000 from Materials & Supplies to Community Policing

#### **Property & Project Management:**

Moved \$10,000 from Downtown Sidewalk Cleaning - \$2,000 to Water & Sewer (Stadium), \$4,000 to ZMC Maintenance and \$2,500 to Equipment Maintenance, \$890 to Vehicle Maintenance and \$610 to Insurance & Bonds (Stadium)

#### **Operations:**

Moved \$8,000 from Material & Supplies (Snow/Ice Removal) - \$4,000 to Vehicle Maintenance and \$4,000 to Materials & Supplies (Sanitation)

#### **Engineering:**

Moved 1,305 from Insurance & Bonds to Contract Services – Permitting Renewal

Bobby Fitts handed out the invoice for the financial advisors for the bond referendum project since there was a question at the last meeting. Commissioner Baxter asked about the financial advisors' travel expenses. Staff explained some meetings were done virtually but they did attend Board Work Sessions and mini retreats.

Joe Moore stated the IT Director, Assistant Town Manager and Personnel Policy addendums were included in the packet.

Lisa Markland explained Dr. Jordon was reviewing the personnel policy and providing comments. The directors will receive a copy to provide feedback.

There was discussion about the IT Director and Assistant Town Manager positions. Commissioner Baxter spoke about how staff was wearing multiple hats and stretched thin and hiring an Assistant Town Manager would help alleviate some of the additional work for staff.

Commissioner Harrison stated the Board needed to recognize potential roadblocks to fill roles and it can be difficult to put dates on positions being filled.



Lisa Markland gave information about assessment centers and a proposed timeline to fill the positions.

**BOARD COMMENTS**

Commissioner Davis thanked the Board for the Women’s History Month proclamation.

Commissioner Harrison also thanked the Board for the Women’s History Month proclamation and spoke about the National League of Cities conference. Commissioner Harrison would be serving as Chair on the National League of Cities Youth Education and Families committee.

Commissioner Miles thanked those who applied to serve on an appointed board.

Commissioner Baxter spoke about the Belarus fundraiser and expressed concerns about the townhomes on Arendell Ave being too close to the road. Staff was asked to revisit sections of the UDO that allowed the development to happen.

Mayor York spoke about the upcoming NCLM elections, congratulated Zebulon Police Department for wrapping up the bank robbery case so quickly.

**CLOSED SESSION**

The Board needed a motion to go into closed session under NC GS 143-381.11(a)(6) for the purpose of personnel discussions.

Commissioner Harrison made a motion, second by Commissioner Clark to go into closed session. There was no discussion and the motion passed unanimously.

NOTE: In closed session, Commissioner Miles made a motion, second by Commissioner Davis to come out of closed session. There was no discussion and the motion passed unanimously.

Commissioner Davis made a motion, second by Commissioner Clark to adjourn. There was no discussion and the motion passed unanimously.

Adopted this the 5<sup>th</sup> day of August 2024.

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Glenn L. York—Mayor

SEAL

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Lisa M. Markland, CMC—Town Clerk

**Zebulon Board of Commissioners**  
**Work Session**  
**Minutes**  
**March 28, 2024**

Present: Mayor Glenn York, Jessica Harrison, Quentin Miles, Beverly Clark, Shannon Baxter, Amber Davis, Joe Moore-Town Manager, Lisa Markland-Town Clerk, Chris Ray-Public Works, Bobby Fitts-Finance, Jacqui Boykin-Police, Michael Clark-Planning, Sheila Long-Parks and Recreation, Kaleb Harmon-Communications, Eric Vernon-Attorney

Mayor York called the meeting to order at 5:00pm.

**APPROVAL OF AGENDA**

Commissioner Clark made a motion, second by Commissioner Harrison to approve the agenda. There was no discussion and the motion passed unanimously.

**FIRE/EMS STATION**

Chris Perry spoke about the steps needed for the Fire and EMS Station.

Tobais Fulwood presented information about the \$7.5 million USDA Grant and the conditions of the grant. The total amount of the project was \$14.6 million and included USDA, Wake County and Town funds to complete the project.

Commissioner Baxter asked if the site would be split out. Chris Perry stated there had been conversations about the advantages and disadvantages of splitting the parcel and needed to look at what was in the best interest of the Town. Eric Vernon explained the federal government's interest was in the use and not the property or boundaries specifically.

An environmental report was completed on the site and details were given and it was explained any contractor working on the site must certify with Build America by America.

Chris Perry added that Eric Vernon also reviewed the letter of conditions and asked him to share his perspective. Mr. Vernon stated the USDA was very thorough in their process and the Town needed to ensure any hired consultants had experience with USDA grants.

Chris Perry spoke about how wonderful the Wake County design team had been to work with and they had a great deal of experience in all the elements. The site behind Town Hall was chosen because it was the geographic center and allowed a better response time. ADW Architects performed the design work and held the public sessions.

Mike Newton from ADW showed the proposed layout of the fire station site and spoke about why it was chosen. The drive faced the existing street to keep lights from shining into residential windows. The building would be approximately 24,000 sq ft with five bays and included sustainable design strategies.

Mark Forestry with Wake County spoke about the advantages and disadvantages of the various methods of contracting for a project. Traditional competitive bid methods were reviewed and spoke about the roles of the Construction Manager at Risk ("CMAR"). Mr. Forestry spoke about the single

prime process and the advantages and disadvantages were detailed. The projects Wake County had done recently with single prime and CMAR were presented.

Commissioner Baxter asked if they would be able to see how the project was progressing with CMAR. Mr. Forestry stated that could be worked into the project. Details were given about how the project and filings would be handled.

Sarah Kahr Richter, a Project Manager with Wake County who would be working with the design team, reviewed the Memorandum of Understanding (MOU) process. The MOU Amendment increased design scope to full design of construction documents, based on schematic design added other professional services, included Construction Manager at Risk (CMAR) pre-construction services, extended the term of the MOU - design and pre-construction services extend through bid and Guaranteed Maximum Price (GMP), and set forth the Mutual Funding Agreement between the parties for the construction of the project. The anticipated cost share would be 51% for the Town of Zebulon and 49% for Wake County. The major approvals and timeline were given. The estimated construction begin date would be August 25 and the construction would take approximately 18 months.

Commissioner Baxter asked if they would know the total cost share portion before the GMP. Sarah Kahr Richter confirmed the Board would not know the final number until May 2025. The CMAR would assist with preparing estimates and would give insight along the way of costs and estimates. There was a question about a contingency being built into the GMP. Mark Forestry stated the contingency is outside the GMP but still part of the project with 5% to 7%.

Chris Perry explained Exhibit B of the MOU would go before the Board at their April 1 meeting.

## **FY '25 REQUESTED BUDGETS**

Joe Moore gave an overview of the capital projects to be presented at the meeting.

## **STREET CAPITAL BUDGET**

Chris Ray presented potential projects including:

- Arendell Ave access and operational improvements
- Pearces Road Roundabout
- Pearces, Jones and Proctor with Roundabout
- Downtown Gateway Roundabout
- Downtown Gateway and Poplar Street Roundabout with improvements
- West Sycamore and Arendell drainage improvements
- Proctor Street improvements – Pearces to Shepard School
- Old Bunn Road – Shepard School Road to Karial Court
- Old Bunn Road – Karial Court through 64 Hwy bridge
- Old Bunn Road – 64 Hwy bridge to Hwy 97
- East Gannon Avenue – Shepard School Road to Walmart

Commissioner Baxter asked if the Downtown Gateway Roundabout would allow large trucks to pass through. Chris Ray explained it would be designed to handle large trucks and to create safer movements to move them out of downtown. There was also discussion about signage and lighting.

Staff spoke about the federal standards and ensured there would be signage in all directions as well as lighting in the area using LED lighting.

Staff explained the projects are long range planning projects. Commissioner Baxter asked which projects staff felt needed to be addressed first. Joe Moore stated there would be information at the April work session about the practical approach with debt capacity for future capital projects.

Commissioner Baxter stated she would review what was presented but was disappointed that CAMPO had not been more receptive to the Town's requests.

Commissioner Harrison stated she liked the East Gannon/Shepard School Road project and the greenway connection.

Mayor York stated there would be a 10-minute break.

The meeting reconvened at 6:35pm.

#### **"WALK ZEBULON" CAPITAL BUDGET**

Michael Clark explained the purpose of sidewalks and walkability was to create an enhanced quality of life, promote small town character, create vibrancy, improve safety, and was an alternative transportation. The proposed projects included Gill Street sidewalk, Proctor Street sidewalk, 700 N. Arendell sidewalk, Poplar Street sidewalk, Pony Road sidewalk, and Beaverdam Creen Greenway Phase II. Staff spoke in detail about each project.

Joe Moore explained if the projects were included in the bond referendum it would be funded for 10 years and the projects could be broken into phases.

Commissioner Baxter stated when the south portion of town develops a crosswalk across Arendell would be needed.

#### **STRATEGIC PLAN GRANT POLICY AND BUDGET**

Kaleb Harmon reviewed the Town's adopted Strategic Plan Grant Policy. The policy budgeted \$5,000 with up to \$1,000 per organization. A non-profit must meet a Strategic Plan focus area, must be a 501(c)(3) organization and serve Zebulon for the last two years. The funded amount would cover operating expenses not capital purchases.

Staff promoted the grant through social media, Public Input, email marketing, non-profit list building and a non-profit luncheon/information session. The non-profit luncheon was attended by 25 participants and staff gathered feedback on the grant policy and current standing of non-profits in Zebulon. The suggestions from the meeting included increasing the grant total amount, increasing the maximum amount per group, and non-monetary assistance from the Town.

Commissioner Baxter stated she did not believe it was the Town's responsibility to fund startup 501(c)(3) and found it difficult to decrease the amount of time a non-profit has been operating to under two years.

There was discussion about timeframes for funding. Commissioner Miles explained non-profits needed to be given assistance at the beginning of their startup and gave an example of Angel Wings. Mayor York had concerns about non-profits groups being held accountable and internal audits to account for the funds they are given.

The Board was in consensus about increasing the \$5,000 grant funding total and Commissioner Harrison spoke about other ways the groups could be assisted during their startup phase. Staff was asked to look to see what other surrounding municipalities were doing for non-profit funding.

**CLOSED SESSION MEETING MINUTES**

Commissioner Baxter pulled March 6, 2023 closed session minutes from the approval. Lisa Markland recommended removing those minutes from approval so staff can review the minutes and bring back before the Board.

Commissioner Baxter made a motion, second by Commissioner Miles to approve the minutes for February 13, 2024, January 29, 2024, June 15, 2023, May 1, 2023, April 3, 2023, March 16, 2023, February 23, 2023 as amended. There was no discussion and the motion passed unanimously.

Commissioner Baxter made a motion, second by Commissioner Miles to unseal closed session minutes for February 7, 2022, May 2, 2022, October 20, 2022, December 5, 2022, March 16, 2023, April 3, 2023, May 1, 2023 and June 15, 2023. There was no discussion and the motion passed unanimously.

Commissioner Baxter asked that staff let the public know how they can gain access to the unsealed minutes. Lisa Markland explained anyone can contact her to receive a copy of the minutes.

Commissioner Miles made a motion, second by Commissioner Clark to adjourn. There was no discussion and the motion passed unanimously.

Adopted this the 5<sup>th</sup> day of August 2024.

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Glenn L. York—Mayor

SEAL

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Lisa M. Markland, CMC—Town Clerk

**Zebulon  
Joint Public Hearing  
Minutes  
April 8, 2024**

Present: Glenn York, Quentin Miles, Beverly Clark, Shannon Baxter, Jessica Harrison, Amber Davis, Joe Moore-Town Manager, Stacie Paratore-Deputy Town Clerk, Michael Clark-Planning, Adam Culpepper-Planning, Cate Farrell-Planning, Sheila Long-Parks and Recreation, Bobby Fitts-Finance, Chris Ray-Public Works, Jacqui Boykin-Police, Chris Perry-Fire, Kaleb Harmon-Communications, Sam Slater-Attorney

Planning Board Present: David Lowry, Domenick Schilling, Stephanie Jenkins, George Roa, Niya Moton, Kyle Adams

Absent: Laura Johnson

Mayor York called the meeting to order at 6:17pm.

**APPROVAL OF THE AGENDA**

Commissioner Harrison made a motion, second by Commissioner Miles to approve the agenda. There was no discussion and the motion passed unanimously.

**PUBLIC HEARING**

**A. Conditional Zoning 2024-01 – 24/7 Fitness**

Cate Farrell spoke about the public hearing process. The request was to rezone 108 Pearces Road and 301 Jones Street from Residential Suburban (R2) to General Commercial Conditional (GC-C) for the development of a fitness center and two retain tenant spaces.

The standards under section 2.2.6.K for a conditional rezoning were:

1. Health, Safety and Welfare
2. Appropriate for location
3. Reasonable in the public interest
4. Other relevant factors

The public hearing notification process was detailed. The zoning map, future land use plan, timeline, concept plan and proposed elevations were shown. The applicant committed to the proposed conditions:

- Developer will prepare a Traffic Impact Analysis (TIA) in accordance with the Town of Zebulon Unified Development Ordinance for review and approval by the Town of Zebulon and will implement required improvements resulting from the TIA.
- The stem length of the parking lot connection to Jones Street will be as shown on conditional rezoning site plan (Sheet C-2.0) and does not meet the 75' minimum length set forth in udo section 5.1.6.f.

## Joint Public Hearing

### Minutes

April 8, 2024

- The total number of parking spaces provided for the project is 79 which is less than the required number of spaces required in table 5.8.4.h of the UDO.
- Modified street building setback along Jones Street to 15'.
- Modified street yard buffer between proposed building and Jones Street to provide pedestrian oriented plaza connection to building.

Staff explained the applicant requested a parking lot stem length reduction from 75ft to 28ft and was providing 79 parking spaces. The building setback was reduced to 15ft from the required 30ft and a modified street yard buffer was added to accommodate a public gathering space to serve future retail. The applicant committed to road improvements on Pearces Road and Jones Street and received 63 points under the Utility Allocation Policy.

The applicant, Curtis Jingles, stated he brought his business to Zebulon to have a facility to serve the community and it had grown to the point of needing to expand.

Commissioner Baxter asked to hear from the traffic engineer on the cost of the anticipated improvements.

Shawn Brennan, with DRMP, Inc., would be performing the traffic study for the site and explained it would be a low trip generator. The site would have a relatively low impact on the existing roadway network.

Commissioner Baxter expressed concerns about an entrance and exit through the Waffle House parking lot impacting their business. Cate Farrell explained that connection was asked for as part of the agreement with Waffle House and has an easement for future connection for the site.

There was discussion about the modified street yard buffer. Brian O’Kane performed the site plan and explained it would be pedestrian friendly with a gathering space.

Commissioner Davis asked about the deviation of spaces in the parking lot. Brian O’Kane explained the area was almost a dead-end parking lot and wanted to add more parking spaces closer to retain space. The reduction from 89 spaces to 79 spaces was higher than necessary according to the ITE manual for fitness centers. There was discussion about how staff chose the numbers for parking per square foot for a facility.

Mayor York asked if the Board had any more questions. There were none.

Mayor York asked if the Planning Board had any questions.

David Lowry expressed concerns about Hendricks Drive, no connection of Jones to Dogwood and additional businesses causing major traffic problems. Domenick also had concerns about traffic in the Waffle House parking lot. There was discussion about the lights affecting the nearby townhomes. Brian O’Kane explained there were substantial trees and buffer plantings and would be appropriately 250 ft from the building to the property line.

There was a question about road improvements on Pearces Road. Mr. O’Kane stated the road would be widened to the full curb and gutter as stated in the Town’s transportation plan.

George Roa asked about the number of members at the gym. The applicant stated there were approximately 800 members and would like to see a 50% increase within the first year. There was further discussion about connection to the Waffle House parking lot and the Joens Street connection.

Commissioner Harrison thanked the applicant for wanting to grow his business in Zebulon and to continue working with staff on the plans.

Mayor York asked if there were any more questions. There were none.

Mayor York opened the public hearing.

Mayor York asked if anyone wished to speak in favor.

Robert Terry stated he liked the idea of the gym, wanted to see Jones open to Dogwood and thought the project should be approved.

Greg Zeckman explained he thought the applicant did a great job with the gym and wanted to see the connection between Jones and Dogwood.

Mayor York asked if anyone else wished to speak in favor. There were none.

Mayor York asked if anyone wished to speak in opposition.

Nicholas Walton stated he had concerns about the project because it would only allow commercial use of the property.

Mayor York asked if there was anyone else who wished to speak in opposition. There were none.

Mayor York asked if anyone wished to speak neither for nor against. There were none.

Mayor York closed the public hearing and referred the matter to the Planning Board.

Commissioner Baxter made a motion, second by Commissioner Clark to adjourn the meeting. There was no discussion and the motion passed unanimously.

Adopted this the 5<sup>th</sup> day of August 2024.

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Glenn L. York—Mayor

SEAL

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Lisa M. Markland, CMC—Town Clerk



**Zebulon Board of Commissioners**  
**Work Session**  
**Minutes**  
**April 18, 2024**

Present: Mayor Glenn York, Jessica Harrison, Quentin Miles, Beverly Clark, Amber Davis, Joe Moore-Town Manager, Lisa Markland-Town Clerk, Chris Ray-Public Works, Bobby Fitts-Finance, Jacqui Boykin-Police, Michael Clark-Planning, Sheila Long-Parks and Recreation, Kaleb Harmon-Communications, Eric Vernon-Attorney

Absent: Shannon Baxter

Mayor York called the meeting to order at 5:08pm.

**APPROVAL OF AGENDA**

Commissioner Clark made a motion, second by Commissioner Davis to approve the agenda. There was no discussion and the motion passed unanimously.

Mayor York stated Commissioner Baxter would not be at the meeting and Commissioner Harrison was running late.

**DIVERSITY RECRUITMENT INITIATIVE**

Chris Perry spoke about the Department's struggles with recruiting a diverse pool of applicants. Information about the opportunity the Town had to participate in Wake County's Diversity Recruitment Initiative known as "Career in a Year" to fund the salary and training of three recruits in FY '25 was detailed. The Diversity Recruitment Plan included focus groups, internal assessment: culture, pay, policy and promotion, removed barriers, paid training, physical agility prep course, replaced the basics aptitude test with success methods, fire services career expo's, television, print, radio, social media advertising and Veterans Career Fair. The 2023 applicants' interview and hiring demographics were shown on a map. The marketing campaign, recruitment engagement, and academy process timeline were reviewed.

The recruitment initiative was designed to increase applicant/new hire diversity and utilize regional marketing for greater exposure. The position salaries, benefits, gear, uniforms, and books are covered by ARPA funds, and employees would be on the job by July 2025.

Commissioner Miles asked about the age limit which Chris Perry stated was 18 years old.

There was discussion about how the initiative increased diversity.

Commissioner Clark stated she thought the initiative was a wonderful opportunity to get a more diverse pool.

Joe Moore stated the decision to partner with Wake County would come before the Board at their regular meeting on May 6, 2024.

## **2024 PROPERTY REVALUATION**

Wake County Deputy Tax Administrator, Nicole Kreiser, spoke about what a revaluation was, why it was done, and the revaluation results from the 2024 reappraisal. It was explained the Wake County 2024 residential overall change was 53% and commercial was 45%. Zebulon's overall change for residential was 48% and 50% for commercial. The commercial real property tax base went from \$425.8M to \$640.5M and the drivers were mini-storage facilities, industrial, apartments, retail, office and restaurants. The average annual growth for Wake County municipalities was shown. Ms. Kreiser encouraged those who had questions to reach out to her.

Joe Moore explained any year there was an appraisal, state statute required the Town to report the revenue neutral tax rate to the citizens. Information was given about how that rate was calculated and the property value growing with the population growth. Diverse housing product, housing supply and development funding were essential in the property value growth. Graphs with the 2009 and 2019 tax bases were shown demonstrating the significance of commercial tax base with GSK representing 31% of total value in 2019. The tax rates from 2009 to 2016 were shown. Mr. Moore explained how the original tax rate was not sufficient and revenue was lost. There were details given about how to determine the revenue-neutral tax rate.

## **FY'25 REQUESTED BUDGETS**

Joe Moore spoke about potential transportation CIP and bond projects. Those projects included:

- Arendell Avenue access and operational improvements
- Pearces, Jones and Proctor roundabout
- Downtown Gateway and Poplar St. roundabout with improvements
- West Sycamore and Arendell drainage improvements
- Proctor Street Improvements - Pearces to Shepard School
- Old Bunn – Shepard School Road to Karial Court
- East Gannon Avenue – Shepard School Road to Walmart
- Judd Street and Arendell intersection improvements

Details about each potential project were given including possible timelines and costs. The total costs of the projects would be \$48M which would be a property tax rate increase of two cents every year for 10 years to support the road projects.

**Joe Moore spoke about the possible pedestrian CIP projects:**

- Pony Road sidewalk
- Gill Street sidewalk
- Proctor Street sidewalk
- 700 N. Arendell sidewalk
- Poplar Street sidewalk

**Possible bond referendum projects include:**

- Library and Proctor Street connector greenway
- Green Spine – East Half
- Beaverdam Creen Greenway Phase II

The costs and potential dates of the projects were given. Staff would provide a recommendation at the May regular meeting.

Joe Moore spoke about market conditions within the Police Department and the difficulty they have had in recruiting. It was explained how the starting salary could be increased to become more competitive in the market. There would be impacts on existing positions if starting salaries were increased. Some higher level positions in the Police Department would be higher than multiple director salaries. The salary budgets needed to be increased to pay the directors fairly but to also be more competitive in the market.

Commissioner Miles asked if the salary numbers were based upon municipalities similar to the Town's size. Lisa Markland explained the salaries were based upon other municipalities the Town's size and where are employees were coming from and going to.

Commissioner Harrison joined the meeting.

There was discussion about retention issues with specifics about the Planning Department. A map showing the Town's labor shed was shown. Employees from County Planning and right out of school were the majority of where new employees came from. It cost the Town money to recruit, train and then to lose employees due to lack of competitive pay.

Mayor York stated there would be a 10-minute break.

The meeting reconvened at 6:53pm.

Sheila Long gave a background of Gill Street Park area explaining prior to the 1960s it served as a household waste landfill and in the 1960s was redeveloped to serve as a park. In 2023 staff was asked by the Board to investigate bathrooms at the park which led to finding lead contamination during the preliminary surface level soil sampling. Some areas had been sectioned off and initial remediation had begun to protect the community. The Town would be responsible to address the issues now. Some grant opportunities would be available, and staff was looking into those. Once the Town received the final report it would let the Board know what remediation steps to take.

Commissioner Harrison asked what was involved with the initial remediation. Sheila Long spoke about the remediation method DEQ uses.

Staff was asked to make a special social media post on how citizens could receive updates on the project. Kaleb Harmon explained the information was updated on Public Input and was also available in Spanish.

Details of the tests that were performed and the importance of engaging the community during the next steps was discussed.

Commissioner Miles asked where to read the lab results. Sheila Long stated that information would be available once it was complete. Eric Vernon gave an overview of how the testing was performed.

Sheila Long explained the Town would work with NCDEQ and they were aware of the steps the Town was taking.

**CLOSED SESSION**

The Board needed a motion to go into closed session under NC GS 143-381.11(a)(5) for the purpose of discussing property acquisition.

Commissioner Harrison made a motion, second by Commissioner Clark to go into closed session. There was no discussion and the motion passed unanimously.

NOTE: In closed session, Commissioner Miles made a motion, second by Commissioner Harrison to come out of closed session. There was no discussion and the motion passed unanimously.

There was a consensus among the Board to have a closed session after the work session May 15, 2024.

Commissioner Miles made a motion, second by Commissioner Davis to adjourn. There was no discussion and the motion passed unanimously.

Adopted this the 5<sup>th</sup> day of August 2024.

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Glenn L. York—Mayor

SEAL

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Lisa M. Markland, CMC—Town Clerk

**Zebulon Board of Commissioners**  
**Minutes**  
**May 6, 2024**

Present: Mayor Glenn York, Quentin Miles, Amber Davis, Jessica Harrison, Shannon Baxter, Beverly Clark, Joe Moore-Town Manager, Lisa Markland-Human Resources Director, Chris Ray-Public Works, Jacqui Boykin-Police, Chris Perry-Fire, Sheila Long-Parks & Recreation, Bobby Fitts-Finance, Michael Clark-Planning, Kaleb Harmon-Communications, Eric Vernon-Town Attorney

Mayor York called the meeting to order at 6:00pm.

**PLEDGE OF ALLEGIANCE**

The pledge of allegiance was led by Cub Scout Troop 522

**APPROVAL OF AGENDA**

Commissioner Baxter asked to amend the agenda to add the Zebulon Bear Cats.

Commissioner Miles asked to remove the Letter of Support-Wake County Historic Preservation from consent.

Commissioner Davis asked to amend the agenda to add travel and training.

Commissioner Baxter made a motion, second by Commissioner Harrison to approve the agenda as amended. There was no discussion and the motion passed unanimously.

**RECOGNITIONS**

*A. East Wake High School*

Mayor York recognized student Sunquinn Broome and teacher Melanie Cline-Pierce from East Wake High School.

*B. Cub Scout Troop 522*

Mayor York recognized Cub Scout Troop 522

*C. Zebulon Bear Cats*

Amanda Roa spoke about the Zebulon Bear Cats and asked for financial assistance for equipment and facility use.

Chrystie O'Neal gave details about goals, mentorship and being accepted into the East Wake Football League.

Chadwick Williams spoke about his positive experience with the Zebulon Bear Cats.

There was discussion about the Bear Cats' registration and non-profit status.

Commissioner Baxter made a motion, second by Commissioner Miles to instruct staff to assist Bear Cats with a facility use waiver for the fees associated with the use of the Town's fields to be discussed at the May 15 work session.

Commissioner Clark clarified that the motion was just for information for the Board.

There was no further discussion and the motion passed unanimously.

### **PROCLAMATION**

Commissioner Davis read the Mental Health Month Proclamation.

Commissioner Harrison read the Foster Care Awareness Month Proclamation.

Commissioner Clark read the Municipal Clerks Week Proclamation.

Commissioner Baxter read the Police Appreciation Week Proclamation.

Commissioner Miles read the Public Works Week Proclamation.

Mayor York read the International Firefighters Proclamation.

### **PUBLIC COMMENT**

Cub Scout Pack 522 spoke about the Flag Retirement Ceremony and passed out Keepsake Tokens for Veteran's Day to the Board.

### **CONSENT**

#### *A. Minutes*

Commissioner Baxter made a motion, second by Commissioner Miles to approve the February 15, 2024 work session minutes. There was no discussion and the motion passed unanimously.

Commissioner Baxter made a motion, second by Commissioner Miles to approve the Wake County tax report for February 2024. There was no discussion and the motion passed unanimously.

Commissioner Baxter made a motion, second by Commissioner Miles to approve the Budget Amendment – Police and Fire off-duty work reimbursement – Ordinance 2024-43. There was no discussion and the motion passed unanimously.

Commissioner Baxter made a motion, second by Commissioner Miles to approve the 2024 Governor's Highway Safety Program Grant Application – Resolution 2024-21. There was no discussion and the motion passed unanimously.

Commissioner Baxter made a motion, second by Commissioner Miles to approve the Memorandum of Understanding – Capital Area Metropolitan Organization. There was no discussion and the motion passed unanimously.

Commissioner Baxter made a motion, second by Commissioner Miles to approve the Budget Amendment – HVAC Replacement at Zebulon Community Center – Ordinance 2024-45. There was no discussion and the motion passed unanimously.

## **OLD BUSINESS**

### *A. Planning*

#### *i. Zebulon South Planned Development – Ordinance 2024-39*

Michael Clark presented the planned development request to develop 320 residential units on 118.62 acres at 751 S. Wakefield Rd, 700 S. Arendell Ave., 0 S. Wakefield St., and 0 S. Arendell Ave.

The standards under section 2.2.25.J for a planned development were:

1. Health, Safety and Welfare
2. Appropriate for location
3. Reasonable in the public interest
4. Other relevant factors

The current zoning map, future land use map, and concept plan were shown. The current zoning was R-4 and R-2 residential zoning.

The concept plan included 320 residential units (townhomes and single-family detached units). Staff explained this created diversity of options within the development and multiple generations to live within the same neighborhood.

The developer had a TIA done that met or exceeded the Town's Transportation Plan.

The applicant received 68 points under the Town's Utility Allocation Policy which exceeded the needed 60 points. The applicant was also proposing to dedicate a portion of the property for a proposed future fire station. Some enhancements of the development included architectural details, bike and pedestrian plan, land dedication and road improvements along S. Arendell frontage.

Michael Clark explained a developer could build 140 units on the parcel by right all on well and septic without being annexed into the Town. However, there would be no amenities, traffic improvements, no dedicated land for a future fire station, and would not be within the corporate limits.

Commissioner Baxter asked how many deviations had been done with the 50-foot lot width since adoption of the UDO. Staff knew of at least one and only two Planned Developments were approved since adoption of the UDO. Commissioner Baxter asked how many people participated in the UDO public engagement. Staff would provide that information to the Board.

Ashley Terrazas Honeycutt, the attorney for the applicant, introduced those who were in attendance at the meeting and could give details about the proposed development. It was explained the Zebulon South Planned Development went before the Board at the February Joint Public Hearing, March Planning Board, and the Board of Commissioners in April and many changes were made as requested.

Rob Rudloff spoke about Pulte Homes and their vision for the community. There was discussion about the amenities included community gathering areas, dog park, exercise stations, playground, garden, athletic field, mobile vendor spaces with electrical connections. Amenities for teenagers were added after requests at the Joint Public Hearing. A condition was added to only allow 20% of homes to be rental homes.

Beth Blackmon with the Timmons Group spoke about public utilities. The developer was extending water and sewer down Arendell and Wakefield and would be designed to meet City of Raleigh and Town of Zebulon standards. Cable, internet and natural gas companies would be responsible for extending their services.

Commissioner Baxter asked if there was a plan for natural gas or high-speed interest. Ms. Blackmon explained the project needed to be in construction drawings before the service providers would finalize plans.

Jeff Hochanadel spoke about the TIA process and trip generation and counts. Mr. Hochanadel reviewed recommended improvements and what DOT recommended. He spoke about the traffic delays at the following intersections:

- The intersection of Wakefield and NC 97 the traffic would add 2.9 seconds per vehicle delay in the morning and 7.3 seconds per vehicle delay in the afternoon.
- The intersection of Arendell and NC 97 the traffic would add 2.8 seconds per vehicle delay in the morning and 3.9 seconds per vehicle delay in the afternoon.
- The unsignalized intersection when turning at Barbee and NC 96 the traffic would add less than two seconds per vehicle delay in the morning and five seconds per vehicle delay in the afternoon.
- The intersection of Perry Curtis and NC 96 the traffic would add less than one second per vehicle in the morning and afternoon.

Commissioner Baxter asked about the recommended mitigation for the intersections in regard to the TIA. Mr. Hochanadel recommended a 50 foot south bound left turn lane, 100-foot stacking and tapering at the north bound turn lanes and a 50 foot right turn lane on Arendell.

Ashley Terrazas Honeycutt reviewed the concerns and feedback of the items addressed over the last two years and the adjustments made to meet those concerns and requests.

Commissioner Miles asked about the future economic development in that area of Town. Michael Clark spoke about the Economic Development Strategic Plan which was being developed and the update to the Comprehensive Land Use Plan to include neighborhood commercial development in that area.

Commissioner Davis asked where the affordable housing was located. Ashley Terrazas Honeycutt explained the affordable units would be located in various areas of the community.



Gina Temple, the property owner, spoke about the property in question and why they chose the Pulte partners. It was also explained how Pulte had exceeded their expectations. The owners supported the project and asked that it be approved.

Michael Clark explained there had been several changes since the Joint Public Hearing and the Board received a redline copy showing those changes. The changes were reviewed including a 20% rental cap, additional amenities, side yard setback, road improvements, HOA citizen board, cross walk indicator near the Community Park, full length driveways, larger pool, and increased affordable housing.

Staff spoke about how the development met all the standards. The standards under section 2.2.25.J for a planned development were:

1. Health, Safety and Welfare
2. Appropriate for location
3. Reasonable in the public interest
4. Other relevant factors

The Planning Board voted 4 to 3 to recommend denial at their March 11, 2024 meeting.

Staff recommended approval of Zebulon South Planned Development – Ordinance 2024-39.

Commissioner Baxter stated Mary Beth Carpenter had questions about the movement of the cemetery and asked her to speak.

Mary Beth Carpenter asked the developer for the archaeology statement and stated some of the ancestors had not been contacted about moving the remains.

Ashley Terrazas Honeycutt explained 55 families were contacted and gave her contact information to Mary Beth Carpenter so she could provide her with all the information.

Commissioner Davis stated the development was beautiful but had concerns about how the development would impact the Town as a whole.

Commissioner Clark explained she liked the development and in order to get more economic development the Town would need more rooftops.

Commissioner Baxter stated she wanted more information from the economic development and had concerns about the rental total. The developer was asked for a commitment from the developer for a 10% or 15% rental cap commitment. Ashley Terrazas Honeycutt stated the developer could go down to 15%.

Commissioner Clark made a motion to approve Ordinance 2024-39 with the addition of only 15% allowable rentals. The motion died for lack of a second.

Commissioner Baxter made a motion, second by Commissioner Harrison to table Ordinance 2024-39 until the May 15, 2024 meeting to be able to see the archaeological report. The motion failed

with a vote 2 to 3 with Commissioners Baxter and Harrison voting in favor and Commissioners Clark, Miles and Davis voting in opposition.

Commissioner Harrison made a motion, second by Commissioner Davis to deny Ordinance 2024-29.

Commissioner Clark asked if a statement was needed for denial. Staff asked the Board to specify which standard was not met. Commissioner Miles stated there was no need for an explanation for their reason to vote denial. Eric Vernon recommended the Board provide a basis for their denial. The Board declined to provide a basis for denial.

Commissioner Clark stated the developer had been working with the Board for so long and did everything that was asked of them.

There was no further discussion and the motion passed with a vote 4 to 1 with Commissioners Harrison, Davis, Baxter and Miles voting in favor and Commissioner Clark voting in opposition.

Mayor York stated there would be a 10-minute recess.

The meeting reconvened at 8:14pm.

*B. Fire*

*i. Participation in Wake County Fire Academy – Funding Agreement*

Chris Perry spoke about the opportunity to participate in the Wake County Fire Academy. The program was explained. The first year was paid for by Wake County and there would be no cost to the Town until FY '26.

Commissioner Baxter asked about the stipulations the County was putting on the Town with the agreement. The Town would continue to keep the employees after the year was over.

Commissioner Miles made a motion, second by Commissioner Baxter to approve participation in Wake County Fire Academy – Funding Agreement.

Commissioner Baxter asked if the program will continue once the ARPA funds were exhausted. Chris Perry explained Wake County committed to continuing the program.

There was no further discussion and the motion passed unanimously.

*C. General*

*i. Bond Referendum – Notice of Intent*

Joe Moore reviewed potential Bond Referendum projects over a 7-year timeframe, tax responsibilities to fund potential projects, staff recommendations and future Board actions.

Commissioner Harrison stated she would like to see if there is a way to address the stormwater issue at Gannon and Poplar.

Commissioner Baxter asked if delaying Judd and Arendell improvements would impact the Fire/EMS building. Staff planned for the fire signal at the intersection and improvements were included to that intersection.

Commissioner Baxter had concerns that the projects will become more expensive the longer the Town waited. Joe Moore explained there was some latitude to move forward with a project sooner. If the \$20M bond was approved the next bond could be as early as November 2025.

## **NEW BUSINESS**

### *A. Parks and Recreation*

#### *i. Angel Prints Corporation – Special Event Application – Resolution 2024-23*

Sheila Long stated there was a request from Angel Prints for their Remembrance Walk October 12, 2024. Details about the event and road closures were given. There was a request for fee waivers.

Commissioner Miles asked to hear from the applicant. Brandon Wiggins explained he was available for any questions from the Board.

Commissioner Baxter asked about the fee associated with the walk. Mr. Wiggins spoke about the ticket prices for the event and how the proceeds would be used.

Commissioner Harrison asked how many families have been served in Zebulon. Mr. Wiggins stated Angel Prints Corporation has served approximately 100 to 150 families

Commissioner Miles made a motion, second by Commissioner Baxter to approve Resolution 2024-23 with the waiver of fees.

Commissioner Baxter stated the fees were nominal and in line with the Town's strategic goals. There was no further discussion and the motion passed unanimously.

#### *ii. Norse Brewing Market Events – Resolution 2024-24*

Sheila Long presented the request from Norse Brewing for events on August 31 and November 30 at their location. The event details were given.

Commissioner Baxter made a motion, second by Commissioner Harrison to approve Resolution 2024-24. There was no discussion and the motion passed unanimously.

### *B. Public Works*

#### *i. Paint the Pavement – Pilot Program Request*

Chris Ray presented the Paint the Pavement project. The Zebulon Downtown Arts Council (ZDAC) was interested in partnering with the Town of Zebulon to accomplish policy goals of citizen engagement and walkability. ZDAC requested to do work at Horton Street, a Town maintained road, to paint an artistic crosswalk. Staff recommended approval of the pilot program request.

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Susan Pearce explained that ZDAC had been working on the project since it was mentioned at a Board meeting. A community survey was done to receive input finding the community wanted more public art.

Commissioner Miles stated he loved the idea of encouraging public art, but wanted public input on what would be painted. It was suggested a policy and procedure for a mural.

Chris Ray stated there was an existing policy and this would be the pilot program to vet the rules and regulations of the policy.

Commissioner Baxter suggested establishing an appearance committee to have residents have more input in identifying projects. It was suggested to create a chalk installation. Commissioner Baxter expressed concerns about installing piano keys in front of a piano bar and wanted to make sure the rules and regulations were enforced fairly across the board.

Chris Ray explained he spoke to Michael Clark and the proposed piano keys would not be an advertisement.

Commissioner Baxter wanted the Main Street Board's input on the project since it would be located downtown.

Commissioner Harrison stated she thought this would liven up downtown, but wanted to ensure they were being fair to all businesses.

There was discussion among the Board to create a paint the pavement policy.

John Lowery, Treasurer of ZDAC, explained the proposed painting was a letter Z and had nothing to do with the piano bar or advertising for it.

Commissioner Baxter made a motion, second by Commissioner Miles to direct staff to create a policy for the Board to review.

There was discussion about the timeframe for staff to create a policy.

Chris Ray explained there was already a policy drafted.

Commissioner Baxter amended her motion to table the paint the pavement project until the policy was brought back before the Board and a decision was made on the policy. Commissioner Miles agreed to second the amended motion. There was no further discussion and the motion passed with a vote 4 to 1 with Commissioners Miles, Baxter, Harrison and Davis voting in favor and Commissioner Clark voting in opposition.

Mayor York stated there would be a five-minute recess.

The meeting was reconvened at 9:37pm.

ii. Public Works Maintenance Yard Expansion – Ordinance 2024-44

Chris Ray presented the budget amendment to provide transfer of existing project funding to the Public Works Maintenance Yard Expansion Project at the Public Works Facility.

Commissioner Clark made a motion, second by Commissioner Harrison to approve Ordinance 2024-44.

Commissioner Baxter stated she wanted to know when projects were under budget and what those funds are. Joe Moore stated that information will be reported at the time of project close out.

There was no further discussion and the motion passed unanimously.

*C. General*

i. Letter of Support – Wake County Historic Preservation Commission

Commissioner Miles stated he wanted to table the matter until the work session.

Michal Clark explained there was no financial obligation to the Town and spoke about the implications of putting the letter of support off further.

Commissioner Baxter asked Scott Carpenter to speak about his thoughts.

Scott Carpenter spoke about why he was not in favor of the Wake County program and favored the national program because of tax credits. There was discussion about the different programs and requirements.

Michael Clark offered clarification about certificate of appropriateness.

Commissioner Miles asked if the letter of support would hurt the Town of Zebulon program. Michael Clark stated the letter did not have any influence on the Town's National Historic District. The letter would help Wake County receive a grant from the State Historic Preservation Office to study the standards to determine whether they should issue a Certificate of Appropriateness for landmark buildings in Zebulon.

Commissioner Clark made a motion, second by Commissioner Harrison to approve the Letter of Support – Wake County Historic Preservation Commission.

Commissioner Miles thanked Preservation Zebulon for their work.

There was no further discussion and the motion passed unanimously.

ii. Travel and Training

Amber Davis stated she wanted to talk to the Board about the expenses of travel and training for the Board of Commissioners. It was explained the Board did not have sufficient funds to attend the conference in Tampa.

Joe Moore stated there would be a discussion about the Board's FY '25 travel and training budget at their May 9 meeting.

There was discussion about the various conferences the Board wanted to attend and budgeting for those conferences.

Commissioner Clark asked what the Governing Board's travel and training budget was. Lisa Markland explained it was \$32,500. Commissioner Clak also asked about the travel and training budgets for Fire, Police and Public Works. Chris Perry stated the travel and training for 60 employees in the Fire Department was \$7,000. The Police budget was \$20,900 for the department and Public Works had a budget of \$15,000 and an additional \$15,000 for the CDL program.

Commissioner Davis made a motion, second by Commissioner Baxter to direct staff to move funds from salaries to travel and training for FY '24.

Joe Moore asked if that was to register everyone for the National League of Cities. Commissioner Davis stated that was correct. Commissioner Baxter stated everyone may not attend. Mayor York stated he was not planning to attend.

There was no further discussion and the motion passed with a vote 4 to 1 with Commissioners Miles, Harrison, Davis and Baxter voting in favor and Commissioner Clark in opposition.

#### **BOARD COMMENTS**

Commissioner Baxter stated she wanted the Board to put together a parade committee with representatives from Public Works and the Police Department as well as an appearance committee. The Board attended City Vision and Commissioner Baxter spoke about her experience.

Commissioner Davis stated it was a wonderful opportunity for the Board to attend the three conferences they went to this year.

Commissioner Miles stated he appreciated all that staff did and wanted to ensure that each department will have what they need within their means. The Zebulon Women's Club was congratulated for celebrating 100 years.

Commissioner Harrison spoke about City Vision and wanted the Board and staff to do a training on First Amendment Auditors. Commissioner Baxter was congratulated for being voted in as the first Vice President for Women in Municipal Government, staff was asked to provide more handicapped seating at events and gave information about the Zebulon Vikings Youth Football Program.

Mayor York spoke about the Shepherd's Way National Day of Prayer and would like it to be expanded next year.

#### **MANAGER'S REPORT**

Michael Clark gave a monthly development update.

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Bobby Fitts reported the following budget transfers:

Finance:

Moved \$2,000 from Retirement - \$1,600 to Insurance & Bonds and \$400 to Contract Services;  
Moved \$3,000 from Group Insurance to Retiree Insurance

Administration:

Moved \$10,000 from Salaries to Contract Services – I.T.;  
Moved \$10,000 from Professional Services to Contract Services – I.T.;  
Moved \$10,000 from Retirement to Advertising;

Property & Project Management:

Moved \$10,000 to Contract Services – Janitorial - \$5,000 from Part-time Salaries & \$5,000 from  
Downtown Sidewalk Cleaning

Operations:

Moved \$2,500 from Part-time Salaries to Salaries (Overtime)

Parks & Recreation:

Moved \$6,130 from Group Insurance - \$5,500 to Part-time Salaries (Community Center) and  
\$630 to Insurance & Bonds;  
Moved \$1,200 from Park Trash Can & Benches to Part-time Salaries (Programs/Events);  
Moved \$3,400 from Little River Park Kudzu Eradication -- \$1,400 to Part-time Salaries (Parks  
Maintenance) and \$2,000 to Electricity & Water;  
Moved \$4,000 from Fuel Expense to Electricity & Water;  
Moved \$3,500 from Retirement to Part-time Salaries (Athletics)

Joe Moore spoke about the upcoming budget work session topics.

Commissioner Baxter made a motion, second by Commissioner Harrison to adjourn. There was  
no discussion and the motion passed unanimously.

Adopted this the 5<sup>th</sup> day of August 2024.

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Glenn L. York—Mayor

SEAL

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Lisa M. Markland, CMC—Town Clerk

**Zebulon Board of Commissioners**  
**Work Session**  
**Minutes**  
**May 9, 2024**

Present: Mayor Glenn York, Jessica Harrison, Quentin Miles, Beverly Clark, Shannon Baxter, Amber Davis, Joe Moore-Town Manager, Lisa Markland-Town Clerk, Chris Ray-Public Works, Bobby Fitts-Finance, Jacqui Boykin-Police, Michael Clark-Planning, Sheila Long-Parks and Recreation, Kaleb Harmon-Communications, Sam Slater-Attorney

Mayor York called the meeting to order at 5:04pm.

**APPROVAL OF AGENDA**

Commissioner Clark made a motion, second by Commissioner Harrison to approve the agenda. There was no discussion and the motion passed unanimously.

**FY '25 BUDGET**

**A. Recommended Budget**

Joe Moore spoke about the budget statutory requirements, budget schedule and process and the budget message. The goals of the 2030 Strategic Plan were Vibrant Downtown, Growing Smart, and Small-Town Life and there was information given about the budget features for each of those goals. The positions in the FY '25 proposed budget included: two Watch Commanders, a Detective, three Firefighters, a Fire Administrative Assistant, Public Works Project Manager, Stormwater Manager, Transportation Planner II, Parks and Recreation Program Coordinator, Parks Maintenance Technician, Facility Maintenance Technician, Budget Analyst and Administrative Assistant to the Governing Board. There was information given about the issues the Town faced with recruitment, retention and compression issues.

An example of the Planning Department's labor shed was shown and how the Town was losing employees to the west due to more competitive salaries and more opportunities to develop skill sets.

The changes in revenue from the FY '24 proposed budget to the FY '25 proposed budget were shown.

Joe Moore explained any year there was an appraisal, state statute required the Town to report the revenue neutral tax rate to the citizens. Information was given about how that rate was calculated and the property value growing with the population growth. The tax rates from 2009 to 2016 were shown. Mr. Moore explained how the original tax rate was not sufficient, and revenue was lost in prior years. During that time, streets started to dilapidate, maintenance costs on fleet increased, the buildings needed more repair, sidewalks were not finished, value was decreasing downtown, and salaries did not increase. It was explained how a moderate increase of three cents per year could have helped to keep up with inflation. Mr. Moore recommended keeping the tax rate consistent at 57.5 cents.

Commissioner Baxter asked how a one cent increase amounted to. Bobby Fitts stated it would be approximately \$250,000.

Information about the changes in expenditures was reported. The total expenditures were \$28.5M with operating costs being \$19.5M and capital accounting for \$13.0M. Mr. Moore spoke about the requested positions, which ones were in, which were not and the rationale used to make that decision.



The topics for the May 15 budget work session were detailed. Joe Moore recommended focusing on the budget message and page 61 of the CIP.

Commissioner Baxter asked about the 3 to 5 year waiting period for new trucks and if that would be addressed before the new fire station was built. Chris Perry explained the CIP did take into account the extended delivery times for fire trucks. A truck was scheduled for replacement in 2027 and would take about two years to order the truck.

### **B. Transportation Impact Fee**

Michael Clark stated the transportation impact fees were causing new commercial development to become very expensive.

Jeremy Potter, from Remy Kemp and Associates, was part of the team hired by the Town to perform an analysis of the Town's transportation needs and how the transportation impact fee could be changed to not be overly cost prohibitive for commercial use. The purpose of the Traffic Impact Fee update was explained. The deficiencies in the roadway network were detailed. Mr. Potter gave a traffic impact fee example. The goal was to try to balance residential and commercial so all plans worked together. There was discussion about the NCDOT and Comprehensive Transportation Plan numbers that were used to look at the projections and to ensure everything was consistent.

Joe Moore stated the Traffic Impact Fee was not intended to be the sole revenue source, other tools were the bond referendum and property tax rate. The Board was encouraged to look at page 46 in the fee schedule.

### **C. Branding**

Joe Moore stated branding and wayfinding funds from FY '24 were not being rolled over to FY '25 unless the Board wanted to continue branding.

Commissioner Harrison asked for an update on the last branding consultants. Joe Moore stated the last presentation was at a mini retreat in Spring of 2023. There was no interest from the Board in moving forward on what was presented. Staff needed direction from the Board on whether they wanted to retain the current consultant, modify the product or to do something different.

Kaleb Harmon gave an overview, elements, and impacts of a brand. The reasons to rebrand were given. It was stated a successful rebrand required input and insight from the community including residents, business owners, community leaders, Town staff and elected officials. The Board was shown pictures of two different McDonald's restaurants and asked for their opinions of the pictures. The rebrand is how you can keep the old but repurposing it to fit your current needs.

Details of the Town of Zebulon brand were detailed including the brand name, logo, slogan, color scheme and typography.

Commissioner Harrison stated the Town had a lot of different demographics, cultures, and generations and did not want to let go of the history of where Zebulon came from.

Commissioner Baxter thought the Town seal was generic and needed to be updated. There was discussion about the typeface and colors.

Commissioner Miles suggested bringing in someone different to design the brand.

Commissioner Harrison stated Zebulon had a strong identity and it was not necessary to do a complete overhaul. The Town needed a stronger identity that speaks to then, now and the future. Kaleb agreed with not starting over and just updating what the Town had.

The Board was asked what they liked about the current seal. Some things mentioned were the outside rim, the circle, black, gold date. Commissioner Harrison appreciated that the seal attempted to tell the story of Zebulon.

The next steps included management examining and discussing today's feedback, reaching out to organizations to lead the rebrand and create a roadmap for the rebrand.

Mayor York stated there would be a 10-minute break.

The meeting reconvened at 7:13pm.

#### **D. Municipal Campus Space Study**

Joe Moore explained the space at Town Hall and the Police Department was not functioning well for citizens or as office space.

Michael Clark explained Town Hall was built as a school and had been retrofitted to meet the needs of staff and operations as a Town Hall. Staff was growing and space was becoming more limited. CPL was hired to review and perform a case study for Town Hall and the Police Department.

Josh Wheeler, with CPL, spoke about the Town's growth. The timeline and plan review were shown.

Commissioner Baxter stated she did not like building onto the existing building. Michael Clark explained there was not a definite space or door that showed the main entrance into the building. The modification would be on the side and would not obstruct or block any character defining features of the building.

Mr. Wheeler stated the upstairs renovations would be minor and most would remain the same. The site plan was shown and it was explained there would need to be an additional building in approximately five years to accommodate for the growth. Details of the Police Department renovations were given.

Commissioner Baxter stated she thought there was a lot of shuffling, and the Police Department just had their kitchen renovated. Mr. Wheeler explained Phase I and Phase II were not concurrent. Phase I did not have to be done. CPL was trying to stay within the existing footprint to keep the costs down.

Commissioner Miles asked how long the renovations would take. Mr. Wheeler explained it would be three to six years.

Commissioner Baxter stated the Economic Development team should not be moved downtown, the existing Fire Station could be retrofit and the EMS building could be utilized.

Commissioners Harrison thought this was jumping the gun with the money that had been invested in facilities over the last few years.

Michael Clark stated each of the consultants met with each of the departments. The Economic Development Department suggested moving into the former EMS building being that it was a Town owned facility. The Department was currently located within the Administration suite but would need to be moved once the Assistant Town Manager was hired. Staff needs were quickly exceeding the capacity of the building and operations could not be stopped.

Commissioner Miles asked if the storage area across from Town Hall could be office space. Michael Clark explained that was more complicated because the fire safes could not be moved together because of their weight. For the short term cubicles could be added to the space for Economic Development and Engineering.

Joe Moore stated the only funding in the FY '25 budget was for the short term to move storage and retrofit the back section.

#### **E. 2024 Street and Sidewalk Bond Referendum: LGC Application and Budget Amendment**

Joe Moore reviewed the recommendation for a \$20M transportation. The projects that needed funding first were the N. Arendell access and operational and sidewalk connection and the Jones connector and Proctor/Pearces roundabout and sidewalk connection. The options for the Board were to move forward with adoptions of a Resolution and Ordinance or to delay the projects. If delayed the N. Arendell project would not begin any sooner than summer '26 and the Jones connector would not be any sooner than summer '27.

Commissioner Baxter stated there was a \$20M without \$20M in projects and asked if projects should be added. The overages could be addressed during the construction phase. It was suggested that taxes could be raised if there were deficiencies. Another question asked by Commissioner Baxter was if the median for the N. Arendell widening project would affect a fire truck responding to a call. Chris Perry explained it was a 4-inch median that could be traversed by a fire apparatus or other public safety vehicle.

Commissioner Miles asked about the \$7M overage. Joe Moore stated the Town's known cost for the N. Arendell project was \$4M with a verbal commitment from CAMPO for a 50/50 match. There was no guarantee, and it could go up to \$8.5M. The amount allowed flexibly since there was not certainty about what CAMPO would support. Also, the construction market has increased significantly, and staff was covering for anything that could come up during the bid time.

There was discussion about the stormwater issues on Gannon. Joe Moore explained the stormwater component was project number three costing \$2M. If there was overage on the projects, bond funds could be used to cover street and sidewalk projects.

Commissioner Harrison stated she was pleased with the explanation of the bond amount. The issues were not going away and needed to be addressed.

Board of Commissioners  
Minutes  
May 9, 2024

Commissioner Baxter asked about a potential park bond for FY '28. Joe Moore explained there was a healthy Parks and Recreation impact fee balance which could be used to purchase land. Funds would be needed to activate those spaces. The land purchase and design process would take time that is why it was recommended for FY '28.

Commissioner Miles asked about the educational portion of the bond. Bobby Fitts explained that covered hiring a consultant to educate and inform the public on the proposed projects. Commissioner Baxter stated she would like to see the invoices for the education campaign as they moved through the process.

Commissioner Harrison made a motion, second by Commissioner Miles to approve Resolution 2024-22. There was no discussion and the motion passed unanimously.

Commissioner Miles made a motion, second by Commissioner Baxter to approve Ordinance 2024-48. There was no discussion and the motion passed unanimously.

Commissioner Miles made a motion, second by Commissioner Davis to adjourn. There was no discussion and the motion passed unanimously.

Adopted this the 5<sup>th</sup> day of August 2024.

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Glenn L. York—Mayor

SEAL

---

Lisa M. Markland, CMC—Town Clerk



**Board of Commissioners**  
P.O. Box 550 • Raleigh, NC 27602

TEL 919 856 6180  
FAX 919 856 5699

SHINICA THOMAS, CHAIR  
SUSAN EVANS, VICE-CHAIR  
VICKIE ADAMSON  
MATT CALABRIA  
DON MIAL  
CHERYL STALLINGS  
TARA WATERS

June 4, 2024

Ms. Lisa Markland  
Town Clerk  
Town of Zebulon  
1003 North Arendell Avenue  
Zebulon, North Carolina 27597

Dear Ms. Markland:

The Wake County Board of Commissioners, in regular session on June 3, 2024, approved and accepted the enclosed tax report for the Town of Zebulon.

The attached adopted actions are submitted for your review; no local board action is required.

Sincerely,

A handwritten signature in cursive script that reads "Yvonne Gilyard".

Yvonne Gilyard  
Clerk to the Board

Wake County Board of Commissioners

Enclosure(s)



Wake County Tax Administration

Rebate Details  
04/01/2024 - 04/30/2024

**ZEBULON**

DATE 05/05/2024  
TIME 10:06:35 PM  
PAGE 1

REBATE NUMBER	PROPERTY	CITY TAG	LATE LIST	BILLED INTEREST	TOTAL REBATED	TOTAL PROCESS DATE	ACCOUNT NUMBER	TAX YEAR	BILLING YEAR	OWNER
877285	284.63	0.00	28.46	0.00	313.09	04/15/2024	0006985685	2023	2023	BONEY'S TRUCKING INC
<b>SUBTOTALS FOR INDIVIDUAL PROPERTY ACCOUNTS</b>					<b>313.09</b>		<b>1</b>	<b>Properties Rebated</b>		
<b>TOTAL REBATED FOR ZEBULON</b>					<b>313.09</b>		<b>1</b>	<b>Properties Rebated for City</b>		



**Wake County Tax Administration**

Rebate Details  
04/01/2024 - 04/30/2024

ZEBULON

DATE 05/05/2024  
TIME 10:06:35 PM  
PAGE 1

REBATE NUMBER	PROPERTY	CITY TAG	LATE LIST	BILLED INTEREST	TOTAL REBATED	PROCESS DATE	ACCOUNT NUMBER	TAX YEAR	BILLING YEAR	OWNER
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Grand Total: 119,843.22 325.00 148.20 0.00 120,316.42 36 Properties Rebated for All Cities

STAFF REPORT  
ORDINANCE 2025-01  
BUDGET AMENDMENT  
FY '24 PROJECT AND PROGRAM ROLLOVERS  
AUGUST 5, 2024

**Topic: Ordinance 2025-01 - FY '24 Project and Program Rollovers**

Speaker: Bobby Fitts, Finance Director (if pulled from Consent)  
From: Bobby Fitts, Finance Director  
Prepared by: Bobby Fitts, Finance Director  
Approved by: Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

Continue funding of capital projects and operational programs approved in FY '24.

**Background:**

The Town of Zebulon has a history of funding most capital projects through Operating Budget line items instead of creating Capital Project Funds. The practice of funding capital projects through Operating Budget line items reflects Zebulon's history of undertaking few capital projects and completing those comparatively modest projects within one fiscal year (this practice will decline in the future as the number and complexity of capital projects increase).

When the duration of a capital project extends beyond the fiscal year, all unspent funds in the Operating Budget "roll-in" to Fund Balance. Those funds must be pulled out of Fund Balance to complete those capital projects already underway. The attached Budget Ordinance pulls those funds back into their respective capital projects originally approved in the FY 2024 Budget.

The attached Budget Ordinance also represents operational items not completed before the end of the fiscal year. Project completion dates are primarily influenced by supply-chain delays incurred from market conditions, the availability and workload of contractors and consultants, or seasonally dependent applications that sequentially start in one fiscal year and end in another fiscal year.

Administration/IT (\$102,220):

Police Department computer replacement, server project, town hall security, furniture replacement, Safety Committee, employee training, tuition assistance program and remote meeting equipment.

Public Works – Property & Project Management Division (\$876,709):

Eastern Wake EMS Property, railroad easement, Generator, Police HVAC, Parks & Rec maintenance building roof, Public Works yard expansion, Equipment Shed and Public Works maintenance building roof.



STAFF REPORT  
ORDINANCE 2025-01  
BUDGET AMENDMENT  
FY '24 PROJECT AND PROGRAM ROLLOVERS  
AUGUST 5, 2024

Police (\$4,400):

Surveillance system.

Public Works – Operations Division (\$3,307,426):

Tub grinding of yard waste, street paving, vacuum truck, Jones Street Connector, Shepard School/Old Bunn signal, sidewalks, W. Horton Street drainage improvements and Judd @ N. Arendell signal.

Fire (\$30,000):

Hose & nozzle replacement.

Public Works – Powell Bill (\$24,960):

Street Paving.

Parks & Recreation (\$340,000):

Treadmill replacement, Gill Street Park Playground, Whitley Park expansion and Park signage.

Community & Economic Development (\$700,000):

HUD Alley Activation.

**Discussion:**

The Board of Commissioners must rollover unspent funds to continue approved capital projects or operational programs not completed during FY 2024.

**Policy Analysis:**

The projects and programs reflect Board policy as part of the adopted FY '24 Budget. They also advance upon goals of the Zebulon 2030 Strategic Plan, or are necessary to support and maintain existing services offered by the Town of Zebulon.

**Fiscal Analysis:**

The unspent funds rolled into Fund Balance. This ordinance pulls those funds back out for use in their intended project or program.

**Staff Recommendation:**

Staff recommends approval of the attached Ordinance.

**Attachment:**

1. Ordinance 2025-01

ORDINANCE 2025-01

BE IT ORDAINED by the Board of Commissioners of the Town of Zebulon, that pursuant to North Carolina General Statutes 159-15, the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2025.

Section 1. To amend the General Fund budget as follows:

	INCREASE	DECREASE
<b>REVENUES</b>		
Fund Balance Appropriated	\$4,685,715.00	
Congressional Grant	700,000.00	
 <b>EXPENDITURES</b>		
Administration – Travel & Training – H.R.	10,000.00	
Administration – Materials & Supplies	7,100.00	
Administration – Computers	24,120.00	
Administration – Contracted Services	25,800.00	
Administration – Contracted Services – I.T.	13,200.00	
Administration – Safety Committee	4,000.00	
Administration – Tuition Assistance Program	3,000.00	
Administration – Remote Meeting Equipment	15,000.00	
Property & Project Mgmt – Eastern Wake EMS Property	34,000.00	
Property & Project Mgmt – Contract Services (Special)	24,000.00	
Property & Project Mgmt – Generator	17,397.00	
Property & Project Mgmt – Police HVAC	55,949.00	
Property & Project Mgmt – P&R Maint. Building Roof	29,645.00	
Property & Project Mgmt – Public Works Yard Expansion	661,214.00	
Property & Project Mgmt – Equipment Shed	13,159.00	
Property & Project Mgmt –Public Works Mtn Shop Roof	41,345.00	
Police – Surveillance System	4,400.00	
Operations – Contract Services (Yardwaste Site Mgmt)	9,900.00	
Operations – Street Resurfacing	15,700.00	
Operations – Vacuum Truck	495,000.00	
Operations – Jones St Connector	330,000.00	
Operations – Shepard School/Old Bunn Signal	333,258.00	
Operations – W. Sycamore/W. Gannon Sidewalks	171,190.00	
Operations – W. Horton St. Drainage Improvements	1,692,378.00	
Operations – Judd @ N. Arendell Signal	260,000.00	
Fire – Hose & Nozzle Replacement	30,000.00	

Powell Bill – Streets	24,960.00
Parks & Recreation – Community Center Programs	5,000.00
Parks & Recreation – Gill St Park Playground Replacement	270,000.00
Parks & Recreation – Whitley Park Expansion	30,000.00
Parks & Recreation – Park Signage	35,000.00
Community & Economic Development – Downtown Development	700,000.00

Section 2. Copies of this amendment shall be furnished to the Town Clerk, and to the Budget Officer, and to the Finance Officer for their direction.

Adopted: August 5, 2024

Effective: August 5, 2024

\_\_\_\_\_  
Glenn L. York - Mayor

ATTEST:

\_\_\_\_\_  
Lisa M. Markland, CMC - Town Clerk

STAFF REPORT  
ORDINANCE 2025-02  
BUDGET AMENDMENT  
FY '24 DONATIONS AND GRANTS ROLLOVERS  
AUGUST 5, 2024

**Topic: Ordinance 2025-02 – FY' 24 Donations and Grants Rollovers**

Speaker: Bobby Fitts, Finance Director (if pulled from Consent)  
From: Bobby Fitts, Finance Director  
Prepared by: Bobby Fitts, Finance Director  
Approved by: Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

Reappropriation of unspent donations and grants received in FY 2024.

**Background:**

The Town received donations and grants for specific purposes in FY '24. Unspent funds in the Operating Budget "roll-in" to the General Fund's Fund Balance. Those funds need to be pulled out of the Fund Balance in order to properly spend them on their intended uses.

The attached Budget Ordinance pulls these funds back in and reappropriates them for their intended uses in the FY 2024 Budget.

Administration/IT (\$23,000):

Blue Cross & Blue Shield Wellness grant.

Police (\$9,719):

\$9,719 to be used towards the Shop with a Cop program.

**Discussion:**

The Board must reappropriate the grants and donations funds to their intended use.

**Policy Analysis:**

The noted operational programs were adopted in the FY 2024 Budget as either advancing upon goals within the Zebulon 2030 Strategic Plan or necessary to support and maintain existing services offered by the Town of Zebulon. The grants and donations were specified to support those programs.

**Fiscal Analysis:**

These funds were budgeted for the associated operational program with the adoption of the FY 2024 Budget. The unspent funds rolled into the Fund Balance. This ordinance pulls those funds back out for use in their intended project or program.

**Staff Recommendation:**

Staff recommends approval of the attached Ordinance.

**Attachments:**

1. Ordinance 2025-02

ORDINANCE 2025-02

BE IT ORDAINED by the Board of Commissioners of the Town of Zebulon, that pursuant to North Carolina General Statutes 159-15, the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2025.

Section 1. To amend the General Fund budget as follows:

	INCREASE	DECREASE
REVENUES		
Fund Balance Appropriated	\$32,719.00	
EXPENDITURES		
Administration – Wellness	23,000.00	
Police – Shop with a Cop	9,719.00	

Section 2. Copies of this amendment shall be furnished to the Town Clerk, and to the Budget Officer, and to the Finance Officer for their direction.

Adopted: August 5, 2024

Effective: August 5, 2024

\_\_\_\_\_  
Glenn L. York - Mayor

ATTEST:

\_\_\_\_\_  
Lisa M. Markland, CMC - Town Clerk

**Topic: Ordinance 2025-03 – United Arts Council Grant**

Speaker: Sheila Long (if pulled from Consent)  
From: Bobby Fitts, Finance Director  
Prepared by: Bobby Fitts, Finance Director,  
Sheila Long, Parks & Recreation Director  
Approved by: Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

The dedication of a United Arts grant towards the funding of Special Events.

**Background:**

The United Arts Council awarded the Town a grant of \$5,000 to support cultural arts opportunities in FY 2025. Awarded funds are authorized by the United Arts Council for live music performances at the Rock the Block downtown concert series.

**Discussion:**

The Board of Commissioners must recognize grant funding through a Budget Adjustment in order to dedicate those funds toward a particular program. Adoption of the attached ordinance will dedicate funds toward Special Events.

**Policy Analysis:**

This event is consistent with the goals of the *Vibrant Downtown* and *Small-Town Life* Focus Areas of the *Zebulon 2030* Strategic Plan. The event specifically addresses a recommendation of the *Play Zebulon* Parks and Recreation Master Plan, “Offer comprehensive services through programs, events, facilities, marketing, partnerships, and community engagement”.

NCGS 159-15, as part of The Local Government Budget and Fiscal Control Act, allows amendments to the budget ordinance with Board approval.

**Staff Recommendation:**

Staff recommends approval of Ordinance 2025-03.

**Attachments:**

1. Ordinance 2025-03

ORDINANCE 2025-03

BE IT ORDAINED by the Board of Commissioners of the Town of Zebulon, that pursuant to North Carolina General Statutes 159-15, the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2025.

Section 1. To amend the General Fund budget as follows:

	INCREASE	DECREASE
REVENUES		
United Arts Council Grant	\$5,000.00	
EXPENDITURES		
Parks & Recreation—Special Events	\$5,000.00	

Section 2. Copies of this amendment shall be furnished to the Town Clerk, and to the Budget Officer, and to the Finance Officer for their direction.

Adopted: August 5, 2024

Effective: August 5, 2024

\_\_\_\_\_  
Glenn L York - Mayor

ATTEST:

\_\_\_\_\_  
Lisa M. Markland, CMC - Town Clerk

STAFF REPORT  
ORDINANCE 2025-04  
ORDINANCE 2025-05  
ESTABLISHING FIRE STATION 2 CAPITAL PROJECT FUND ORDINANCE  
AUGUST 5, 2024

**Topic:** Ordinance 2025-04 and Ordinance 2025-05 – Fire Station 2 – Capital Project Fund  
**Speaker:** Bobby Fitts (if pulled from Consent)  
**From:** Bobby Fitts, Finance Director  
**Prepared by:** Bobby Fitts, Finance Director  
**Approved by:** Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

The Board of Commissioners will consider ordinances which would establish a capital project fund for the Fire Station 2 project.

**Background:**

As part of the Fiscal Year 2025 budget, \$500,000 was budgeted for the purchase of land for Fire Station 2.

**Discussion:**

Ordinances 2025-04 and 2025-05 would establish the Fire Station 2 Capital Project Fund. These funds would then be allocated to the future purchase of land without the need to roll over funds to next fiscal year.

**Policy Analysis:**

Governmental Accounting Standards Board (GASB) statement number 54 allows capital project funds to account for and report financial resources that are restricted, committed or assigned to expenditure for capital outlays including the acquisition or construction of capital facilities and other capital assets.

**Staff Recommendation:**

Staff recommends approval of Ordinance 2025-04 and 2025-05.

**Attachments:**

1. Ordinance 2025-04
2. Ordinance 2025-05



ORDINANCE 2025-04

BE IT ORDAINED by the Board of Commissioners of the Town of Zebulon, that pursuant to North Carolina General Statutes 159-15, the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2025.

Section 1. To amend the General Fund budget as follows:

	INCREASE	DECREASE
REVENUES		
Fund Balance Appropriated	\$500,000.00	
EXPENDITURES		
Fire – Transfer to Fire Station 2 Capital Proj Fund	500,000.00	

Section 2. Copies of this amendment shall be furnished to the Town Clerk, and to the Budget Officer, and to the Finance Officer for their direction.

Adopted: August 5, 2024

Effective: August 5, 2024

\_\_\_\_\_  
Glenn L. York - Mayor

ATTEST:

\_\_\_\_\_  
Lisa M. Markland, CMC - Town Clerk

**ORDINANCE 2025-05  
ESTABLISHING A CAPITAL PROJECT FUND FOR  
THE FIRE STATION 2 CAPITAL PROJECT**

BE IT ORDAINED by the Board of Commissioners of the Town of Zebulon, that pursuant to §159-13.2 of the North Carolina General Statutes, the following Capital Project Ordinance is hereby adopted.

Section 1. The project authorized is the Fire Station 2 Capital Project.

Section 2. The officers of this unit are hereby directed to proceed with the capital project within the terms of the grant agreement and the budget contained herein.

Section 3. The following amounts are appropriated for the project.

Land Acquisition	<u>\$500,000.00</u>
Total	\$500,000.00

Section 4. The following revenues are anticipated to be available to complete this project.

Transfer from General Fund	<u>\$500,000.00</u>
Total	\$500,000.00

Section 5. The Finance Officer is hereby directed to maintain within the Capital Project Fund sufficient specific detailed accounting records to satisfy the requirements of the grant and state regulations.

Section 6. Funds may be advanced from the General Fund for the purpose of making payments as due.

Section 7. The Finance Officer is directed to include a detailed analysis of past and future costs and revenues on this capital project in every budget submission made to the Board.

Section 8. The Finance Officer is directed to report on a quarterly basis on the financial status of each project element in Section 3.

Section 9. Copies of this Capital Project Ordinance shall be furnished to the Town Clerk, to the Governing Body, the Budget Officer, and to the Finance Officer for direction in carrying out this project.

Adopted this 5<sup>th</sup> day of August, 2024.

ATTEST

\_\_\_\_\_  
Glenn L. York, Mayor

\_\_\_\_\_  
Lisa M. Markland, Town Clerk

**Topic:** Adoption of the Economic Development Strategic Plan  
**Speaker:** Shannon Johnson, Community & Economic Development Director  
**From:** Shannon Johnson, Community & Economic Development Director  
**Prepared by:** Shannon Johnson, Community & Economic Development Director  
**Approved by:** Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

Consideration of approval of the Economic Development Strategic Plan.

**Background:**

The Town Commissioners approved funding in FY 2023 for the creation of an Economic Development Strategic Plan to guide the commercial growth of the Town. Upon hiring an Economic Development Specialist, an RFQ was crafted, a consultant was chosen, and work commenced in June 2023. The consultants collaborated with the Town's citizens and businesses to develop a plan leveraging inherent assets and addressing anticipated challenges. The community provided input multiple times during the plan's creation and again when a draft was shared.

**Discussion:**

Adopting this plan allows the Director of Community & Economic Development to develop a work plan demonstrating impact in five areas of concentration: leveraging regional assets, fostering an inclusive economy, identifying key economic growth areas, supporting businesses, and ensuring economic readiness.

**Fiscal Analysis:**

Adopting the plan does not have a fiscal impact. The anticipated expenditures for year one are in the FY 2025 budget.

**Policy Analysis:**

Adopting the Economic Development Strategic Plan aligns with the three focus areas defined by the *Vision 2030: Strategic Plan*. The ED Strategic Plan allows for sustainable growth in creating a *Vibrant Downtown*, preserving *Small Town Life*, and *Growing Smart*.

**Staff Recommendation:**

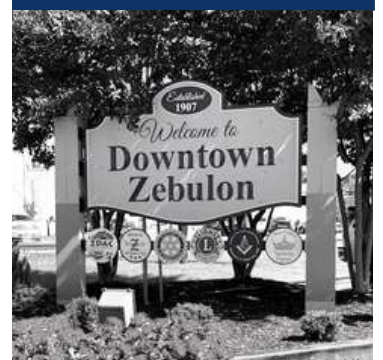
Staff recommends approval of the attached Economic Development Strategic Plan.

**Attachments:**

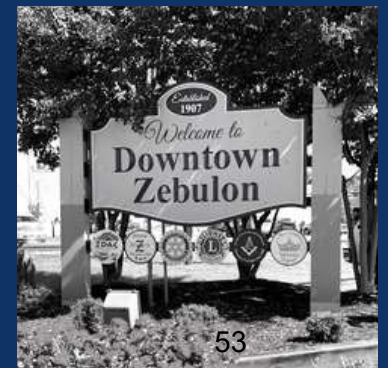
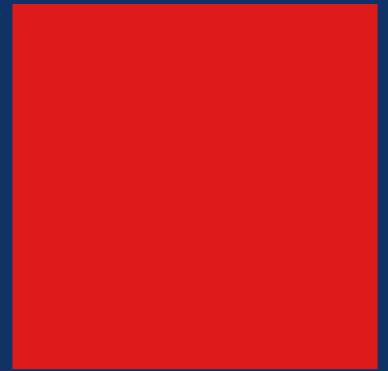
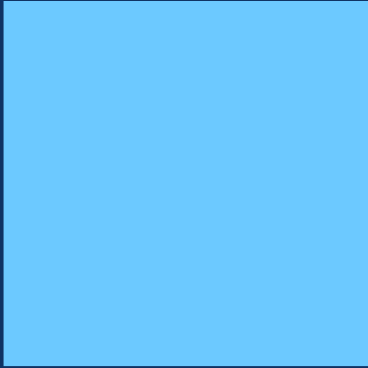
1. Economic Development Strategic Plan

# ECONOMIC DEVELOPMENT STRATEGIC PLAN

20  
24



Prepared by Fountainworks & KH Consulting Services, LLC



# ACKNOWLEDGEMENTS

The Economic Development Strategic Plan was made possible through the efforts of the individuals and groups listed below, as well as 200+ community members whose participation was an essential component of the process.

## BOARD OF COMMISSIONERS

Glenn York	Mayor
Jessica Harrison	Mayor Pro Tempore
Shannon Baxter	Commissioner
Beverly Clark	Commissioner
Amber Davis	Commissioner
Quentin Miles	Commissioner

## TOWN STAFF

Joe Moore, PE	Town Manager
Michael Clark, AICP, CNU-A	Planning Director
Shannon Johnson, PMP	Economic Development Specialist
Teresa Piner, AICP	Downtown Main Street Director

## COMMUNITY WORKGROUP

Brian Bullock	Vice President, Ashbrook Builders
Anthony Pirrello	Executive Director, East Wake Academy
Hunter Rascoe	Vice President, Design Dimension, Inc.
John Saffold	Executive Director, Zebulon Chamber of Commerce
Jennifer Williams	Board Chair, Zebulon Chamber of Commerce

## SUPPORTING PARTNERS

Liz Hounshell	Pastor, Zebulon United Methodist Church
Brandon McCraney	CEO & Master Blender, Olde Raleigh Distillery
Sam Rauf	Senior Economic Development Manager, Wake County Economic Development

## CONSULTANT TEAM

Julie Brenman	Chief Operating Officer, Fountainworks
Maddie Shea	Project Director, Fountainworks
Drew Finley	Project Manager, Fountainworks
Laura Gomez-Nichols	Project Analyst, Fountainworks
Warren Miller	Founder & President, Fountainworks
Kathleen Henry	Owner, KH Consulting Services, LLC

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# EXECUTIVE SUMMARY

## OVERVIEW

The Town of Zebulon’s (“the Town” or “Zebulon”) has completed its first comprehensive economic development strategy, set forth in this plan. The contents of this plan represent the culmination of nearly a year’s worth of extensive research and stakeholder involvement. The purpose of the Economic Development Strategic Plan is to articulate a clear vision for Zebulon’s economy that includes overarching economic goals, objectives, actions, and measurables to assess progress and determine success.

In recent years, Zebulon has experienced significant population growth; this trend is only expected to continue. With this growth comes the opportunity for strategic investment in our community’s assets: our Downtown, our existing businesses, and the recruitment and attraction of new businesses. This strategy comes directly from what we heard from our community and has been tailored to address the Town’s unique strengths and challenges. It includes actionable recommendations for fostering a more resilient and inclusive economy that mitigates risks of displacement of the historically underserved and vulnerable communities of Zebulon.

Throughout the process, Town leaders remained committed to the idea that the strategy be developed in partnership with community members. A robust community engagement process—including community cafés, surveys, and workshops—contributed significantly to this final document. The plan pays special attention to how our success and economic growth may impact vulnerable communities of Zebulon and offers best practices to mitigate negative consequences.

Through a comprehensive understanding of community desires and targeted investments on specific industries, the Economic Development Strategic Plan will serve as a blueprint for how Zebulon can unlock economic opportunities that benefit our entire community.

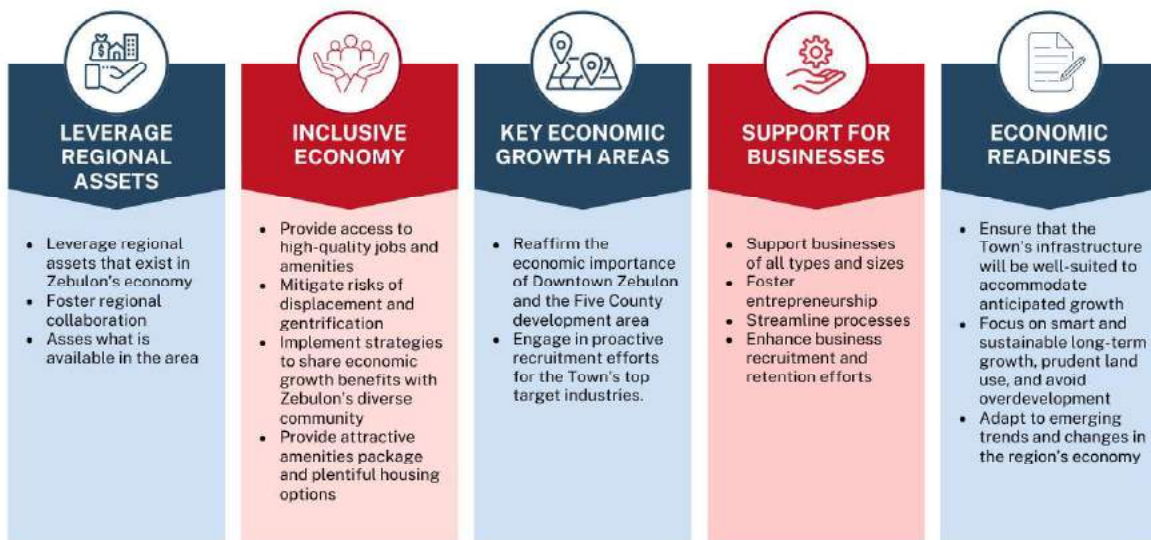


# KEY COMPONENTS OF THE PLAN

Our vision sets the foundation for the plan:

*Zebulon will foster an inclusive, vibrant, diverse, and sustainable economy.  
Zebulon will be a regional player that prioritizes intentional and responsible growth  
while retaining the Town's unique charm and character.*

In pursuit of our vision, the Town of Zebulon has developed the following **five focus areas as the core of its economic development strategy**:



Zebulon has identified these five focus areas to guide its economic development work over the next five years. Town staff will work to develop an implementation plan which includes specific actions and measures. More information about each of these focus areas is available in the next section of the document.

# ECONOMIC DEVELOPMENT STRATEGIC PLAN

## INTRODUCTION

The Town of Zebulon is a vibrant, growing community in eastern Wake County, North Carolina. The Town boasts well over a century of rich, diverse history and is known as “The Town of Friendly People.” Chartered in 1907, Zebulon was born from the advancement of the railroad. Investors in the Raleigh and Pamlico Sound Railroad wanted to establish a path through the eastern portion of North Carolina starting in Raleigh and connecting to Wilson, and the Town of Zebulon was born.

Now, in 2024, Zebulon has completed its first comprehensive economic development strategy, set forth in this plan. The contents of this plan represent the culmination of nearly a year’s worth of extensive research and stakeholder involvement. The purpose of the Economic Development Strategic Plan is to articulate a clear vision for Zebulon’s economy that includes overarching economic goals, objectives, actions, and measurables to assess progress and determine success.

In recent years, Zebulon has experienced significant population growth; this trend is only expected to continue. With residential growth comes the opportunity for strategic investment in our community’s assets: our Downtown, our businesses, and the recruitment and attraction of new businesses. The strategy comes directly from what he heard from our community and has been tailored to address the Town’s unique strengths and challenges. It includes actionable recommendations for fostering a more resilient and inclusive economy that mitigates risks of displacement of the historically underserved and vulnerable communities of Zebulon.

Throughout the process, Town leaders remained committed that the strategy be developed in partnership with community members. A robust community engagement process—including resident cafes, surveys, and workshops—contributed significantly to this final document and guided the creation of the plan’s vision, focus areas, and priorities. The plan is mindful of how our success and economic growth may impact vulnerable communities of Zebulon and offers best practices to mitigate negative consequences.

Through a comprehensive understanding of community desires and targeted investments in specific industries, the Economic Development Strategic Plan will serve as a blueprint for how Zebulon can unlock economic opportunities that benefit our entire community.

# PROCESS

The Town worked closely with a team of consultants specifically selected for their economic development, public engagement, and strategic planning expertise. In collaboration with the Town, this team conducted a robust [environmental assessment](#) that included a thorough review and synthesis of existing plans, research on economic development best practices (with specific focus on strategies to mitigate the risks of displacement and gentrification), and a review of data on current and projected growth and development in Wake County and the Eastern part of the Research Triangle Region. The environmental assessment established the economic baseline and market context that serve as the foundation of this plan.

Community input was a critical component of the plan development process. An online survey was conducted, available in both English and Spanish, and received 151 responses. The Town also held three in-person community café events at locations around Zebulon to provide more forums for community members to express their opinions, concerns, and preferences on issues related to economic development.

Following the community cafés, Town staff held a retreat to review the stakeholder engagement findings. They employed human-centered design concepts to inform their analysis of the findings. The Town then convened a community workgroup, comprised of five community leaders, that met virtually to further shape the community input. The community workgroup also developed the vision for the ideal Zebulon economy and established the focus areas for this strategic plan. A staff retreat was then held to refine and finalize the plan. Once the plan is adopted, Town staff will continue developing the implementation plan.

# VISION

The vision statement articulates our long-term view of the ideal future of Zebulon's economy. For more information on different components of the vision, see the [Appendix](#).

*Zebulon will foster an inclusive, vibrant, diverse, and sustainable economy.  
Zebulon will be a regional player that prioritizes intentional and responsible growth  
while retaining the Town's unique charm and character.*

# FOCUS AREAS

The five focus areas below will guide the Town’s economic development work over the next five years. Town staff will work to develop an implementation plan which includes specific actions and measures. These focus areas were developed by the workgroup of community leaders, informed by research, and driven by the community’s feedback and direction. The Workgroup members identified top priorities to move each focus area forward. This plan also includes additional priorities that, while not as critical as the top priorities, are nonetheless important objectives. The top priorities provide direction to the Town’s economic development staff and offer guidance for where the Town should invest the most time, energy, and resources.



## LEVERAGE REGIONAL ASSETS

Zebulon is committed to leveraging regional assets that exist in Zebulon’s economy, fostering regional collaboration, and assessing what is available in the area. The priorities in the Leverage Regional Assets focus area aim to harness the Town’s strong, diverse workforce and large consumer base to ensure a thriving business ecosystem and help drive innovation. The Leverage Regional Assets focus area also acknowledges that ensuring smart and sustainable growth means *the Town cannot be all things to all people*, especially when some amenities already exist in neighboring communities.

### **Top Priorities**

- Maintain and strengthen partnerships with Wake Technical Community College (Wake Tech) and its future Eastern Wake 4.0 Campus for business recruitment, existing industry, and strategies around upskilling the existing labor force in Zebulon.
- Collaborate with Wake County and neighboring communities to attract amenities, ensure regional access, and participate in regional economic and workforce development initiatives.

### **Additional Priority**

- Utilize State economic development support, such as those items detailed in [First in Talent](#), North Carolina’s 2021 Strategic Economic Development Plan.



## INCLUSIVE ECONOMY

The Town will cultivate an inclusive economy that provides access to high-quality jobs and amenities while mitigating the risks of displacement and gentrification often associated with increased investment in historically underserved communities. The Inclusive Economy focus area will implement equitable and inclusive strategies to share economic growth benefits with Zebulon’s diverse community while also providing an attractive amenities package with plentiful housing options for the Town’s wide spectrum of residents.

### **Top Priorities**

- Mitigate displacement and gentrification by adopting strategies that actively work to ensure that longtime residents are not displaced, priced out, or pushed away from Zebulon. Ensure that everyone benefits from economic growth and the changes that occur as a result of it.
- Ensure a balanced mix of residential development across all price points and housing types (including affordable housing, workforce housing and executive housing) and ensure Zebulon remains an attractive (but not cheap) place to live.

### **Additional Priorities**

- Support workforce development in and around Zebulon by ensuring access to well-paying jobs with expanded career opportunities in and around Zebulon.
- Provide access to high-quality amenities such as shopping and entertainment options.
- Recognize that Zebulon cannot be all things to all people and that some community assets may not need to be located within the Town itself.



## **KEY ECONOMIC GROWTH AREAS**

Zebulon reaffirms the economic importance of Downtown Zebulon and the Five County development area. Both of these areas hold historic significance for the community and are ripe for additional economic investment.

### **Top Priorities**

- Pursue redevelopment efforts for the Five County development area to be a catalyst for the areas in near proximity by leveraging its location as a central convergence point that serves Eastern North Carolina and connects directly to the Triangle region.
- Enhance walkability, connectivity, and infrastructure, particularly in Downtown Zebulon, to increase accessibility and maintain Zebulon's unique character.
- Engage in proactive recruitment efforts for the Town's top target industries (life sciences, food manufacturing, and advanced manufacturing).

### **Additional Priority**

- Encourage a robust mix of types of businesses and preserve and enhance the quality of life and reasons to be in Zebulon's downtown as outlined in Zebulon's Vision 2030 Strategic Plan.
- Address and grow the Town's industrial areas by targeting additional industries that require a larger footprint and a more focused marketing strategy such as smart grid and clean technology.
- Improve the marketing and recruitment strategy for new industries to locate in the Industrial Drive area.



## SUPPORT FOR BUSINESSES

Zebulon is committed to supporting businesses of all types and sizes—new and existing businesses, large industries and small businesses—through fostering entrepreneurship, streamlining processes, and enhancing business recruitment and retention efforts.

### **Top Priorities**

- Partner with Wake Tech and establish a Zebulon Launch Program to support local entrepreneurs. Launch programs provide business training, micro-loans, mentorship, and networking opportunities to help early-stage entrepreneurs develop and grow their businesses.
- Expand and diversify the Town’s tax base beyond the primary tax contributors.
- Simplify and streamline interactions with Town staff to create a business-friendly environment.

### **Additional Priorities**

- Support entrepreneurial initiatives through partnerships with community stakeholders such as the Innovation and Entrepreneurship Program at North Carolina State University.
- Adopt a regional approach to business recruitment and retention by tapping into the strengths of existing organizations.
- Bring community leaders together to develop a purposeful and intentional strategy for locating businesses.



## ECONOMIC READINESS

The Town’s infrastructure will be well-suited to accommodate the anticipated growth that is expected to occur in and around Zebulon. This growth will be smart, focused on prudent land use, and will avoid overdevelopment. Economic readiness is critical to ensure that Zebulon’s economic efforts are sustainable for long-term growth and allow the Town to remain adaptable to emerging trends and changes in the region’s economy.

### **Top Priorities**

- Continue efforts to address and alleviate traffic congestion as outlined in the Grow Zebulon Comprehensive Transportation Plan.
- Maintain, upgrade, and extend all utilities and infrastructure (including water, sewer, and Internet) to ensure sites are ready to receive new businesses while continuing to support existing businesses and residences.

### **Additional Priorities**

- Advocate for transportation improvements such as highway bypasses, rapid bus transit, and mass transit options like passenger rail service.
- Develop the Town’s land in a prudent manner that acknowledges land as a limited resource and in alignment with the Grow Zebulon Comprehensive Land Use Plan.
- Avoid overdevelopment and the temptation for Zebulon to be all things to all people.

# KEY LEARNINGS FROM OUR COMMUNITY

Planning that does not involve community members in the early stages often fails to gain support from residents when implementation begins. By incorporating community desires into Zebulon's economic development strategy, community members are more inclined to support initiatives. Below is a summary of what we have learned through extensive community engagement efforts. For more detailed information, see [Appendix](#).

People choose to live in Zebulon because of housing affordability, family ties, quality of life, the local character/charm, and the ability to commute to jobs outside of Zebulon. Residents want **more, and better amenities**. Top requests were full-service **restaurants, grocery stores, and entertainment/recreation** options. Additionally, community members noted they want easier access to healthcare services. Many also wish for increased access to educational and training opportunities in Zebulon—including workforce development and entrepreneurship programs.

During our community cafés, residents discussed the need for **improved infrastructure** which can support a thriving community. Examples include public transportation, connectivity via sidewalks and bike paths, and robust utility infrastructure including water, sewer, and Internet.

Community members also emphasized the need for **affordable housing**. They emphasized that housing in Zebulon should not only be affordable but also accessible and of high quality. Residents expressed a desire for greater variety of housing types (55 and older, temporary, accessory dwelling units, etc.) and for policies to be established to prevent relocation due to gentrification. For more information on best practices to mitigate displacement, see the next section as well as the [Environmental Assessment](#).

Priorities for job creation include fostering growth in technology/information technology, the service industry, healthcare, and ensuring jobs offer higher pay and a living wage. These actions contribute to the overall economic prosperity and well-being of Zebulon's residents. Community members want a **greater variety of jobs available** to them and emphasized that jobs should have the opportunity for career advancement.

When thinking about the role the Town can play in addressing the community needs, residents expressed that the Town should try to limit overdevelopment, encourage affordable housing, and seek to limit gentrification. Additionally, the Town can **support businesses** by having a government liaison to act as a “one-stop-shop” resource. Streamlined government processes (such as with permit approval), grants, loans, and tax incentives for start-ups, and **offering easily accessible and well-communicated resources can also serve to bolster businesses’ ability to thrive** in Zebulon.

# TARGET INDUSTRIES

As part of the plan development, the Town conducted a comprehensive commercial and industrial assessment. This assessment included an analysis of the Town’s current industrial assets, a review of land use allocations, and identification of opportunities that can create sustainable opportunities for job creation and capital investment in Zebulon.

Due to its strengths and existing assets, Zebulon should **primarily focus on the Life Sciences, Food Manufacturing, and Advanced Manufacturing** industries. Secondary target industries, which Wake County is focused on, include SmartGrid/Clean Technology and Headquarters. Wake County Economic Development is recruiting more headquarters to the county, so Zebulon may see the effects of these efforts in the future. Some municipalities within the county are creating clauses within their incentive policies that specifically target Headquarters, which may contribute to opportunities for Zebulon to explore. Recruiting SmartGrid/Clean Technology typically requires a larger footprint and would require a more focused marketing strategy.

The Town should agree to a list of targeted industries and subsequently build out a marketing strategy that tells the story of why Zebulon is an ideal location for businesses. Additionally, if future buildings become available due to the departure of an employer, the Town should conduct strong marketing and recruitment efforts to fill that space with the targeted industries.

Summary of target industry recommendations:

- Increase proactive marketing efforts focusing on Life Sciences, Food Manufacturing, and Advanced Manufacturing
- Develop passive approach with two of Wake County’s targeted industries: Smart Grid/Clean Technology and Headquarters
- If buildings become available due to the departure of an employer, conduct strong marketing and recruitment efforts to fill that space with the targeted industries
- Agree to targeted industry list and subsequently build out a marketing strategy that tells the story of why Zebulon is an ideal location for businesses

# BEST PRACTICES TO MITIGATE DISPLACEMENT

Research has identified the following best practices to mitigate the impacts of displacement and gentrification. For more information on these practices, see the [Environmental Assessment](#).

## To limit general displacement:

- **Best Practice 1: Community Wealth Building**  
Supports Zebulon 2030 Strategic Plan’s Growing Smart Tactical Action: “Pursue economic development opportunities with our community partners.”

Community wealth building (CWB) is an economic development practice that is focused on the residents of a community retaining power and control of assets. CWB heavily relies on regulatory support from public institutions and on capital from private “anchor” institutions. This public-private partnership funds locally owned cooperatives that are staffed by



community members and invests in local real estate to specifically prevent displacement. Anchor institutions are key to this model because of their leverage in the private market. Wake County is home to several potential anchor institutions because it is home to prominent tech companies, universities, and healthcare systems. Examples include IBM and Red Hat, Duke Health Systems, SAS, WakeMed Health and Hospitals, North Carolina State University, and the Research Triangle Institute (RTI).

- **Best Practice 2: Community Land Trusts**

Supports Zebulon 2030 Strategic Plan's Growing Smart Tactical Action: "Plan for appropriate land use to meet transportation and housing needs."

Community land trusts are another effective form of CWB. In their simplest form, community land trusts buy properties and keep them affordable. Community land trusts are nonprofit, community-based organizations whose mission is to provide affordable housing in perpetuity by owning land and leasing it to those who live in houses built on that land. Once the community land trust owns the property, they are able to determine how the land is used and ensures its alignment with community needs and goals. Often homes or other buildings can be built or placed on the owned land. These homes are then sold to individuals at below-market prices, making them more affordable. While many community land trusts focus on affordable housing, they can also serve other community goals. Land can be used for commercial spaces, community centers, urban agriculture, or preserving open spaces (among other uses). They prioritize community needs and goals over private profit, and they are a tool to fight against displacement caused by rising land prices and gentrification.

- **Best Practice 3: Preservation of Unsubsidized Affordable Housing**

Supports Zebulon 2030 Strategic Plan's Growing Smart Tactical Action: "Plan for appropriate land use to meet transportation and housing needs."

The United States' largest supply of affordable housing, or naturally occurring affordable housing (NOAH), are homes that are affordable due to their age or condition. It is estimated that 76% of all affordable housing in the United States are NOAH homes. NOAH homes are often not well-maintained (intentionally or unintentionally) and are in areas susceptible to gentrification because of their low cost. Moreover, NOAH renters are often people of color. Therefore, when NOAH properties are sold to development companies and they are refurbished and restored, tenants are either evicted or offered "cash for keys" by the development company to replace them with more affluent tenants.

Local governments can preserve NOAH homes by simply bringing awareness to them. By beginning to identify the current supply of NOAH homes in Zebulon, efforts can be taken to preserve them through other means. For example, leveraging existing partnerships with Wake County and using the existing Community Development Block Grant are steps the Town can take to provide additional assistance to residents in NOAH homes. The Town can also adopt a proactive approach to its building code and minimum housing standards to address homes that are not well-maintained. Retaining a clear picture of the current market ensures that the current supply of affordable homes are naturally maintained.

Local governments can also partner with private developers to offer subsidies, and, in exchange, guarantee that they will keep prices affordable on properties.

- **Best Practice 4: Targeted Hiring Through Ordinance**

Supports Zebulon 2030 Strategic Plan's Growing Smart Tactical Action: "Pursue economic development opportunities with our community partners."

Targeted hiring is an economic development strategy that requires private businesses contracted by a government entity to hire a certain demographic within the local population. Local governments typically establish a minimum percentage that businesses must employ for publicly funded projects. By creating an ordinance, it gives control to the local municipality for the job inclusion of the projects. Moreover, it empowers the community and provides valuable jobs and training to those with unique needs. This practice ensures that jobs are held in the community, and that the local population has opportunities to build wealth.

### To minimize commercial gentrification:

- **Best Practice 1: Store Size Caps**

Store size caps limit the square footage and impose building height restrictions. They do not explicitly prohibit corporations from moving in, but size caps are effective at preventing big box stores from moving into areas where small businesses operate. Additionally, they can preserve the culture of a neighborhood by preventing an abnormal increase in scale compared to other businesses in the area. Conversely, large corporations can still adjust the size of their stores to compete with local small businesses. For example, large fast-casual chain restaurants, barber shops, and even big box stores can adjust the sizes of their stores to meet zoning requirements.

- **Best Practice 2: Entrepreneurship and Small Business Development**

The Entrepreneurship and Small Business Center is a free service made available through Wake Technical Community College and Wake County that is funded through local taxes. The LaunchWakeCounty wing of the Center provides entrepreneurs with networking, training, and assistance with acquiring capital in under-resourced communities in Wake County.

Knightdale, Wendell, Morrisville, Apex, Cary, Fuquay-Varina, Garner, Holly Springs, Raleigh, and Rolesville have their own Launch program, but Zebulon does not have that as a resource for its residents (although it is identified as a top priority in this plan). Lastly, this practice supports Zebulon's efforts, as outlined in the Comprehensive Land Use Plan, for "Coordinating with educational institutions such as Wake County Technical College, the Wake County Public School System and local private schools to develop entrepreneurial curricula and exposure to real world business situations and opportunities."

### Additional Best Practice Notes:

- Accessory Dwelling Units are a unique workaround to the housing supply. They allow tenants to build smaller dwellings on their property, and it is allowed by-right in Zebulon, as outlined in the Unified Development Ordinance.

- [Land Banking](#) continues to spring up across the nation and is playing an increasingly important role in revitalization efforts in places such as Cuyahoga County, Ohio, and Fulton County, Georgia. Local governments in North Carolina can perform the basic functions of a land bank by cobbling together existing statutory authority. In this way, the local government itself serves as the land bank and performs the major activities of a land bank, which are acquiring and holding troubled properties, stabilizing properties and eliminating encumbrances, and conveying properties to a redeveloper.
- [Community Benefits Agreements \(CBAs\)](#) can be a powerful tool for communities to promote equitable development practices that advance housing justice. CBAs are legally binding contracts between coalitions of community-based organizations and developers that shape how local development projects contribute to improving the quality of life of nearby residents. When implemented effectively, CBA processes shift power more evenly to ensure the residents most impacted by development projects have a say in the priorities for the new investments.
- [Equity in amenities planning](#) can help mitigate commercial gentrification by identifying areas where residents and businesses may not have access to essential amenities, goods, and services. These amenities, goods, and services include childcare, parks, open space, trails, community facilities, fresh food, healthcare, pharmacies, financial services, and internet service.
- [Local economic incentives](#) such as business investment grants can play an important role in supporting local businesses. In the City of Raleigh, for example, these grants are based on new job creation and new ad valorem taxable investments made by companies.

# IMPLEMENTATION PLAN

The Economic Development Specialist will hold ultimate responsibility for overseeing the implementation of the strategic plan, with coordination and support from the Town Manager. The strategic plan contains priorities within each focus area, and the Town will track progress on these priorities. Our work plan for implementing our strategy will be developed as follows:



## Annual Progress Report & Evaluation

The Town Manager will share an annual report with the Board of Commissioners to monitor progress to ensure the desired outcomes and adjust as needed. The Economic Development Specialist will evaluate the results in each focus area annually and will identify new or shifting areas of focus as the Town’s circumstances change. Annual progress reports will be shared with the public.

## Measures of Success



Indicators of success will be used to track progress and support shared accountability across the organization regarding progress on the various priorities. These indicators will reflect not only the success of the plan’s goals but also the community’s success as a whole. Below are suggested indicators:

- Growth in dollars of taxable property in property tax base
- Ratio of combined commercial and industrial taxable property to residential taxable property
- Percent change in property values of identified properties

- Property value per acre or square foot of identified properties
- Poverty rate
  - Percent persons in poverty
  - Median household income
- Commercial vacancy rate percentage
- Industrial vacancy rate percentage
- Combined commercial and industrial vacancy rate percentage
- Affordable housing
  - Number of new affordable housing units constructed
  - Number of housing units razed for construction
  - Number of building permits issued

## Potential Priority Tracker

An example tool for evaluating the plan and its implementation is included below. Regular evaluation is encouraged and can form the basis for public progress updates.

Strategic Focus Priority Tracking		Priority/Activity Name	Q1	
<b>Overall Status:</b>				
<b>Priority/Activity Charge</b> Zebulon staff will fill in this box with information on what initiative or activity they are focusing on		<b>Goals and Objectives</b> What do you hope to achieve through this priority? How does this priority relate to the overall goals and objectives of Zebulon?		<b>Connections to Other Zebulon Work</b> How does this priority relate to other Zebulon activities, initiatives, and programs? Are there potential collaborations that would further Zebulon as an organization?
<b>Proposed Steps and Timeline for Completion</b> How do you plan to undertake this priority? Is there a timeline associated with any potential tasks?		<b>Potential Metrics</b> Are there any metrics that might show success in this priority? These are not set in stone but an opportunity to brainstorm. The Economic Development Specialist will work on strong performance metrics.		<b>General Information &amp; Resources</b>
				<b>Individual(s) Responsible:</b> Name(s) of primary individual(s) responsible for priority.
				<b>Key Zebulon Staff:</b> Any key Zebulon staff working on this priority.
				<b>Resource Needs:</b> What resources (volunteer/staff time, financial, physical, etc.) are needed for this priority? Please keep in mind Zebulon's existing bandwidth and resource pool
				<b>Allocated Staff Time:</b> Zebulon staff will fill in this box with how much staff time can be dedicated to the priority
<b>Progress Reports and Dates</b>		<b>Realized Metrics</b>		
<b>Q1 (Jul-Sept):</b>	Did activities go as planned? Is the priority on track? If not, please explain	If applicable, what did identified performance metrics show?		
<b>Q2 (Oct-Dec):</b>	TBD			
<b>Q3 (Jan-Mar):</b>	TBD			
<b>Q4 (Apr-Jun):</b>	TBD			
 developed by:				

# APPENDIX

## ENVIRONMENTAL ASSESSMENT

### ENVIRONMENTAL ASSESSMENT OVERVIEW

The Economic Development Strategic Plan was developed and finalized over the course of approximately eleven months (August 2023-July 2024). This Environmental Assessment was one of the first parts of this process and was completed in October of 2023. The Environmental Assessment served as a reference and guide throughout the creation of the Plan and encompasses the following objectives:

- Understanding/incorporating the plans and visions that the Town currently has in place and how these relate to overall economic growth and development goals
- Identifying strengths, gaps, and reoccurring themes for the Town to address as it relates to economic development
- Identifying best practices that can be considered for incorporation within the completed economic development strategy

The Environmental Assessment is divided into four sections:

- 1.) [A synthesis of existing plans](#) previously approved by the Town, which encompasses crucial insights pertaining to economic growth and development, ensuring that the economic development strategy ultimately aligns with the Town’s vision and adopted policies
- 2.) [Economic development best practices](#) and strategies that are proven to support smart growth and economic prosperity
- 3.) [Best practices, strategies, and available resources to mitigate the risk of displacement of vulnerable and/or historically underserved residents that can occur with growth and development](#)
- 4.) [Data on current and projected growth and development](#) in Wake County and the Eastern part of the Research Triangle Region.<sup>1</sup>

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<sup>1</sup> For purposes of the Environmental Assessment, the “Research Triangle region” is referenced in accordance with the counties defined by the [Research Triangle Regional Partnership](#) (RTRP). Edgecombe County is also included because the City of Rocky Mount has territories in both Nash (RTRP County) & Edgecombe (not RTRP County).

# PART 1: SYNTHESIS OF EXISTING PLANS

This section includes a summary encompassing crucial information and insights pertaining to economic growth and development from the following Town plans and documents: Vision 2030 Strategic Plan, Grow Zebulon Comprehensive Transportation Plan, Play Zebulon Parks and Recreation Master Plan, Grow Zebulon Comprehensive Land Use Plan, and the Town’s Unified Development Ordinance.

## VISION 2030 STRATEGIC PLAN

The Town of Zebulon has an overarching vision to maintain its small-town charm while continuing to grow. Specifically, **Focus Area 1: Vibrant Downtown** has several efforts already underway. The Downtown Zebulon Organization is a public-private partnership with the Town focused on spurring economic development opportunities for the Downtown area. Downtown has the potential for more retail and mixed-use development. Additionally, **Focus Area 3: Growing Smart** is tied directly to economic development strategies.

## RELEVANCE TO ECONOMIC DEVELOPMENT STRATEGIC PLAN

**Focus Area 1: Vibrant Downtown** has been a priority for Town staff for the past few years. The Zebulon Downtown Organization is charged with administering the Main Street Program and building public-private partnerships to spur economic development that achieves measurable results such as investment, business growth, and job creation.

**Focus Area 3: Growing Smart** includes the following relevant priority goals:

### Plan for appropriate land use to meet transportation and housing needs

The Comprehensive Land Use Plan and Unified Development Ordinance will inform the development of the Economic Development Strategic Plan.

### Pursue economic development opportunities with our community partners

This priority is a focus of the Economic Development Strategic Plan. Potential partners may include Wake County, Zebulon Chamber of Commerce, the North Carolina Main Street Program, the Zebulon Downtown Organization, the Zebulon Mudcats, and NC State University – just to name a few.

## GROW ZEBULON COMPREHENSIVE TRANSPORTATION PLAN

## RELEVANCE TO ECONOMIC DEVELOPMENT STRATEGIC PLAN

Implementation of the Comprehensive Transportation Plan (CTP) will help the Town support its projected growth. The plan identifies priority areas for safety improvements and general improvements around specific corridors and the Downtown area. Improved transportation infrastructure – including roads, transit options, pedestrian walkways, and parking – can attract more residents and visitors alike to visit Zebulon’s businesses and enjoy all that Zebulon has to

offer. Favorable transportation infrastructure is also attractive to prospective employers and developers. Proximity to well-connected transportation nodes (such as transit stations or highways) increases property values and can attract businesses, retailers, and residents. Reliable and efficient transportation systems can enhance quality of life by reducing commute times and congestion.

The CTP references CAMPO's Title VI, Minority, Limited English Proficiency (LEP), and Low- Income Public Outreach Plan, noting areas with a high concentration of vulnerable residents. These tracts are mostly located in southern and western Zebulon. Specifically, research has identified block groups one and two within census tract 543.06 as vulnerable to gentrification and displacement because of the high rate of renters, low median household income, and diverse population. This area is also home to Zebulon's only Section 8 housing development, Shannon Drive Apartments, funded through the Wake County Housing Authority. The area is furthermore referenced as a potential "high interest" area in Zebulon's Comprehensive Land Use Plan. **The Economic Development Strategic Plan should pay special attention to impacts in southern and western Zebulon.**

The CTP builds on the 2015 Greenway Plan. Walkable, bikeable communities have both health and economic benefits. Continuing to focus on greenway development throughout the area can increase connectivity, increase the development of a unique sense of place, and attract new residents.

*According to the National Association of Realtors 2023 survey, 79% of respondents rate walkability as "very" or "somewhat" important, and 78% say they'd pay more for a home in a walkable community.*

The CTP makes five primary recommendations for implementation:

1. Meet with potential developers and review the CTP map to determine the required right-of-way and cross-section requirements for a particular site early in the development process.
  - o *Partnering with developers is critical and may offer opportunities for developers to play a greater role in connecting the area.*
2. Require the construction of half of the roadway cross-section, including bicycle and pedestrian facilities, within the road frontage limits of the proposed development.
  - o *Including construction requirements in the UDO itself – potentially in the form of a UDO text amendment – may help the Town achieve its goal of shifting some of the transportation network improvement costs toward developers so that transportation infrastructure can grow in a sustainable manner.*
3. Require a traffic impact analysis (TIA) in accordance with the UDO to identify offsite improvement opportunities that may be caused by development. Attention should be given to the priority intersections identified on the CTP map.
  - o *The CTP identified several high-crash areas, such as 64 & 96, 96 & Wakelon, 96 & 97, and 96 & Green Pace Road. The Town should pay special attention to these intersections when improving transportation infrastructure, which can ensure greater mobility for residents and visitors alike.*
4. Leverage fee-in-lieu payments in accordance with the UDO, if necessary.
  - o *Sidewalks can increase walkability and desirability of a locale. Section 6.8 of the Grow Zebulon UDO requires sidewalk on both sides of a roadway within several zoning districts, such as residential and mixed-use, as well as along both sides of principal and minor arterial streets regardless of zoning. By leveraging fee-in-lieu payments, the Town may be able to build*



- sidewalks to meet UDO requirements at a faster pace, therefore increasing connectivity within the Town.*
5. Have operational and connectivity analyses completed for the priority intersections, or hot spots, to better position the Town for funding that may become available.
    - o *Pre-planning efforts can help move the Town further, and faster, along pipelines for funding, including the State Transportation Improvement Program (STIP).*

## PLAY ZEBULON PARKS AND RECREATION MASTER PLAN

### RELEVANCE TO ECONOMIC DEVELOPMENT STRATEGIC PLAN

The Play Zebulon Plan acknowledges the importance of providing excellent parks and recreation facilities for a diverse and growing population. This recognition is vital for attracting and retaining residents, including young families and professionals, who contribute to the town's economic vitality.

**Partnering with developers** to incorporate parks, open spaces, and recreation facilities into new neighborhoods aligns with smart growth principles. These partnerships can make new developments more attractive to potential residents and contribute to the overall economic development of the town. Additionally, parks can also help to generate revenue for the Town and provide partnership opportunities for local businesses.

The Town has adopted the use of **impact fees** for developers, which can provide funding for parks and recreational infrastructure. This measure reduces the financial burden on the town's budget and ensures that new developments contribute to the overall quality of life and attractiveness of Zebulon.

One of Parks and Recreation's most notable programs is hosting special events, often in partnership with local businesses. The Play Zebulon Plan emphasizes creating opportunities for residents and visitors of all ages. Zebulon is growing, with a large influx of younger citizens along with an increasing percentage of households with people over 60, indicating a large number of residents aging within the Town. **When developing the Economic Development Strategic Plan, the Town should consider partnership opportunities between parks and local businesses that can appeal to different age groups.**

By following the Plan's year-by-year recommendations to improve existing parks and facilities, Downtown Zebulon will be enhanced with a park and amphitheater, both of which can draw residents and visitors alike to the area and nearby local businesses. The Plan also includes a roadmap for park development around the Five County Stadium, a current major economic center for the Town.

A ½ cent tax for walkability improvements is currently available and provides approximately \$40,000 - \$60,000 of funding annually. These funds can be used by the Town for items such as signage – which can create a unique sense of place – and access improvements.

The Economic Development Strategic Plan may consider some of the grant programs outlined in the Play Zebulon Plan, which can fund park improvements and lessen the financial burden on the Town for such improvements.

Play Zebulon also outlines 15 three-year priority action items, bucketed into “capital,” “acquisitions,” “policy,” “initiatives,” and “programming.” These action areas work in parallel to provide a roadmap for sustainable park development. Specifically, Policy Item 1 involves integrating the Play Zebulon Master Plan recommendations into other Town plans. **The Town should strongly consider ensuring all Play Zebulon recommendations are included in its Economic Development Strategic Plan.**

## **GROW ZEBULON COMPREHENSIVE LAND USE PLAN RELEVANCE TO ECONOMIC DEVELOPMENT STRATEGIC PLAN**

Ten strategic priorities were identified based on the Zebulon Today report findings, which provided a snapshot of Zebulon as it was in 2020. Several of these priorities directly relate to growth and economic development:

- Center growth management on “APF” – Adequate Public Facilities
- Fortify a resilient economic (and tax) base
- Steer Downtown momentum
- Think BIG but share costs wisely

There are five Focus Areas of the plan, two of which directly relate to growth and economic development: growth capacity and economic development.

**Guiding Principles 3, 4, and 6 of the Zebulon Tomorrow Vision are the most relevant goals for the Town to keep in mind as it creates its Economic Development Strategic Plan.** They are as follows:

- **Guiding Principle #3: Zebulon will be **balanced**.**  
Zebulon will seek to be a complete and balanced community as it grows. From an economic and tax base standpoint, this relates to having both great neighborhoods and living options while also being an attractive host community for major employers and a wide array of small businesses. Zebulon also must balance the needs of older, established neighborhoods and commercial areas with the necessary management and servicing of growth at its edges.
- **Guiding Principle #4: Zebulon will be **prudent**.**  
The range and magnitude of future financial commitments facing Zebulon’s leaders and Town management will only increase as the community grows in both population and territory. Zebulon will continue to weigh the costs and benefits of all such decisions, pursue ways to leverage local resources through external funding and partnerships, and seek equitable methods for staying financially sound while ensuring that future generations help bear the cost of major investments from which they will benefit.

Zebulon must also be prudent by safeguarding its past investments in community infrastructure and public facilities, to ensure they are sustained throughout their useful life

cycle. Forward thinking and risk avoidance will prevent unnecessary costs from ever being borne, enabling Town resources to be directed as much as possible to pursuit of strategic priorities that eventually turn vision into reality.

- **Guiding Principle #6: Zebulon will be resilient.**

The foundation for a resilient community is a diverse local economy that will continue to attract investment and generate jobs over the long term while bolstering the Town's tax base. Zebulon's economic base must also be able to withstand times of recession and avoid over-reliance on one or a few major employers.

While this and other Zebulon plans emphasize the importance of the Five County Stadium district, there is no clear vision for what this district ought to be. **The Town should take advantage of the opportunity that this Economic Development Strategic Plan presents to refine its vision for the Five County Stadium district.**

## **GROW ZEBULON UNIFIED DEVELOPMENT ORDINANCE**

### **RELEVANCE TO ECONOMIC DEVELOPMENT STRATEGIC PLAN**

The Unified Development Ordinance (UDO) seeks to promote redevelopment of underutilized sites served by public infrastructure while at the same time protecting existing, established development and neighborhoods from incompatible infill and redevelopment (which is related to the Town's overarching goal of mitigating displacement).

In addition, the UDO aims to "establish a unique sense of place" in eastern Wake County by promoting revitalization of the downtown and surrounding areas, encouraging the establishment of new greenways, and establishing new requirements for open space set-asides. Another key UDO objective is to promote a strong and diverse economy that includes high-quality, aesthetically-appealing development and site features as a means of attracting and retaining talent and promoting the Town's economic competitiveness. **Finally, the Town's Utility Allocation Policy is relevant to economic development goals** as well. In order to preserve and enhance property values, manage its limited water supply as a vital natural resource, promote economic development, and incentivize smart growth practices, the allocation of Zebulon's potable water and sanitary capacity shall adhere to an approved Utility Allocation Policy for the following development processes:

- Site Plan for development of non-residential site (new or redevelopment)
- Site Plan for residential development consisting of three or more dwellings
- Conditional Rezoning requests
- Planned Development requests
- Special Land Use Requests
- Major Subdivision Requests

Due to increasingly limited funding availability, the Town has made a conscious effort to require developers to complete transportation network improvements to ensure the network keeps pace with the Town's needs. Chapter 6 of the UDO outlines developer requirements to help pay for roads per guidance of the Comprehensive Transportation Plan. This strategy may help the Town achieve its goal of shifting some of the transportation network improvement costs to developers so that the Town and its transportation infrastructure can grow in a sustainable manner.

# PART 2: ECONOMIC DEVELOPMENT BEST PRACTICES

The following section gathers economic development best practices, strategies, key programs and initiatives from across the region and state that have been proven to support smart growth and economic prosperity within the following categories:

- Small Business Support
- Workforce Development
- Business Recruitment, Retention, & Expansion
- Marketing
- Innovation/Entrepreneurship

## SMALL BUSINESS SUPPORT

It will be necessary for the Town of Zebulon to evaluate their small business ecosystem to understand specific needs as it relates to immediate and long-term sustainable growth for this particular community. There are, however, some consistent challenges faced by the small business community across the US and subsequently in Wake County and the region, including the following:

- Hiring Challenges
- Affordable & Flexible Workspaces

Outlined below are some recent responses and best practices to offset these challenges and provide environments that support community & collaboration among small businesses operating within their Town & region.

### Hiring Challenges

Small businesses, especially within the hospitality industry in Wake County and North Carolina, have faced increased hiring challenges due to the pandemic, labor shortages, and changing demographics.

There are multiple organizations serving Wake County who have resources and/or funding available to support talent recruitment and talent pipelines for companies across Wake County. In fact, several organizations have already partnered together to create and roll out programs to specifically address hiring challenges within the hospitality industry, including the Greater Raleigh Convention and Visitors Bureau (GRCVB), Capital Area Workforce Development Board (CAWDB), Wake County Hospitality Alliance, NC Career Works Center, and the North Carolina Restaurant and Lodging Association. The City of Raleigh and Wake County appropriated \$1.25 million to CAWDB to help with implementation of strategies and programs that will help small businesses recruit candidates, prepare workers for new roles, mitigate hiring and training costs, and put future employees on a path towards upward mobility<sup>2</sup>.

The following organizations will be critical assets for the Town of Zebulon in accessing existing programs and funding while also helping inform new programs and strategies to consider in the future. Apart from the North Carolina Restaurant and Lodging Association, these organizations work across multiple industries.

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<sup>2</sup> <https://www.visitraleigh.com/partners/annual-report/admin-technology/>

### [Capital Area Workforce Development Board](#)

A federally funded workforce development entity, Capital Area Workforce Development Board (CAWDB) serves businesses in Wake County with opportunities for financial assistance, growth, and more, including grants for new businesses who are actively hiring, tax credits to help mitigate workforce costs and percentage reimbursements in wages during training. Additionally, CAWDB hosts an annual Career Expo. Capital Area Workforce Development Board is a great resource for both small business initiatives and as part of a comprehensive Business Recruitment, Retention, and Expansion strategy.

### [Greater Raleigh Convention and Visitors Bureau](#)

The GRCVB is the official and accredited destination marketing organization for all of Wake County. The GRCVB is the voice of the hospitality & tourism industry within Wake County, helping organize and spearhead major campaigns to raise awareness around one of the most impacted industries during the pandemic.

### [Wake Tech Small Business Center & Launch Program](#)

Launch Wake County, hosted by the Wake Tech Small Business Center, aims to support and develop entrepreneurs and small businesses in under-resourced communities in the county. Towns across Wake County collaborate with Wake Tech to offer a Launch Wake County program for established or aspiring entrepreneurs in their communities. By nurturing homegrown, Main Street businesses, they hope to strengthen the small-business ecosystem across the region. The following municipalities across Wake County are already utilizing this support program: Apex, Cary, Fuquay-Varina, Garner, Holly Springs, Knightdale, Morrisville, Raleigh, Rolesville, and Wendell.

### [North Carolina Restaurant and Lodging Association](#)

NCRLA is the uniting force of the North Carolina hospitality industry, bringing together restaurant and lodging establishments and partners who support the community. The NCRLA impacts legislation and policies, cultivates relationships, and provides valuable resources to help members run their business. As a result of the pandemic effects on the small business and hospitality sector, the NCRLA has already rolled out a new program for employers and future workforce: [NCRLA Free Hospitality Training Programs](#).

All organizations listed above are either federally funded, state funded, or supported by corporate partners to implement resources and programming to small businesses for free.<sup>3</sup> If funds continue to be set aside and partners are engaging, these resources will continue to be provided for free. Because of this, it will be important for the Town of Zebulon to engage in consistent communication with these organizations to better understand all resources and programs available to their small businesses. In addition, it will be advantageous for Zebulon to update these organizations on results of the comprehensive evaluations that will take place over the next 12 months as these insights will help guide future initiatives and investments at the state and regional levels.

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<sup>3</sup> The resources & programs mentioned above are free to small businesses and engagement/partnerships with the Town of Zebulon are free; however, there are some special scenarios with CAWDB & Wake Tech (specific to their Corporate Business Services) where tailored services may come at a small cost to the company. For example, if a company needs more intensive wrap around services for training or workforce development that exceed the state or federal allotment of hours.

## Flexible and Affordable Office Space

As a result of the COVID-19 pandemic and subsequent economic impacts, businesses have struggled to justify increased costs of storefronts or longer-term lease agreements for office space. Coworking spaces, which gained popularity across the Research Triangle over the past 5-7 years, have consistently offered creative, collaborative, and flexible environments for small businesses to operate. They provide environments that support growth, reduce overhead costs, and provide access to resources and a supportive environment.

A successful and well-branded coworking community can provide office access while also attracting small business service providers across the region who are willing to offer free consultation services – banking, accounting, legal and more. It can also be the centralized hub for hosting programming tailored to the specific needs of the diverse Zebulon small business community.

### Successful Coworking Examples

There are many best practice success stories across Wake County that show the impact of coworking spaces on a community. The examples listed below would also serve as potential partners/resources as Zebulon explores this concept further:

#### [Raleigh Founded](#)

While Raleigh Founded is home to beautiful coworking and dedicated office space, it is about more than that; it is about providing the tools and resources necessary for organizations to scale, grow, and have a more significant impact on the community. Raleigh Founded supports their members and partner organizations to create a more inclusive and supportive community in Raleigh and beyond. Raleigh Founded has also consulted with cities throughout North Carolina (Yanceyville, for example) who reached out to seek help in building an entrepreneurial hub for their community. In addition, Raleigh Founded has space on Centennial Campus at NC State University where they have incorporated a prototyping space<sup>4</sup>.

#### [Blue Co.](#)

Jason Widen, founder of Raleigh Founded, has also created a new coworking concept that will provide service-based workers, tradespeople, small business owners, e-commerce companies, and food and beverage entrepreneurs with flexible and cost-effective warehousing solutions.

#### [Loading Dock](#)

The Loading Dock was founded by Philip Freeman, Founder and CEO of [Murphy's Naturals](#), in May 2016 out of a desire to bring together impact-minded leaders and entrepreneurs. When he began pursuing his entrepreneurial dreams, Philip worked out of his garage for 3 years to launch his first products. When it came time to leave his daytime job and fully pursue Murphy's Naturals, he needed a larger space to operate. His first official lease was a two-year commitment - but within six months, his team outgrew their space. To accommodate the growing demand within the confines of a long-term lease, Murphy's Naturals rented multiple storage units and subleased space from additional warehouses. It was time to pursue a much larger option, which led him to [Dock 1053](#). The warehousing and office space available at this location moved his

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<sup>4</sup> <https://wraltechwire.com/2020/08/19/raleigh-founded-jason-widen-rifts-on-new-name-evolving-mission-and-the-future-of-co-working/>

team from 2000 square feet of space to 20,000 square feet, leading to the birth of The Loading Dock community.

### [THRIVE | Holly Springs](#)

The Town of Holly Springs redeveloped the former Police Station into a 45 station coworking space.<sup>5</sup> Located on the second floor of [The Block on Main](#) at 300 S. Main St. in Downtown Holly Springs, THRIVE | Holly Springs offers a variety of memberships designed to meet the needs of both large and small enterprises, as well as independent entrepreneurs, freelancers and students. Featuring flex desks, designated desks, private offices, mailboxes, day passes, and multiple meeting rooms all with 24/7/365 access, THRIVE's inspired hybrid workspace experience delivers purpose, flexibility and collaboration. As part of THRIVE, Holly Springs gains a roster of special events, including monthly catered breakfasts, lunches, and happy hours, as well as adventures and outings (anything from hikes to hang gliding).<sup>6</sup>

### [Blush](#)

Located in Cary, Blush is a woman-focused coworking space that offers on-site childcare. While membership is open to all, its offerings are specifically targeted toward supporting women. Additionally, its location in a popular shopping center close to residential neighborhoods is an intentional choice, allowing members to "drop in" more easily than if it were located in a downtown area.

### [Frontier RTP](#)

The Frontier is a building in Research Triangle Park which offers both paid office space along with free coworking. The coworking space is open to the public and includes a kitchen, four meeting rooms available for booking, and a variety of desk/seating options – all for free. The management requests that those who want to use the space register for membership via an app, which helps track usage of the facilities. The Frontier also offers programming for tenants and coworking members alike, including lectures, panels, networking events, and wellness activities. The bottom floor of the building includes the coworking space, free meeting rooms, and larger paid classrooms; the upper floors include office space for nonprofits and local start-ups. Unlike the other coworking examples, Frontier RTP is owned and managed by a nonprofit institution, the Research Triangle Foundation.

## WORKFORCE DEVELOPMENT

A focus on workforce development creates a prosperous and thriving economy by supporting businesses and their continued need for skilled labor, while also providing upward mobility for residents, removing barriers to education, and increasing access to well-paying jobs and strong careers.

North Carolina is a leader in workforce development. They were the first state to offer state-funded workforce development incentives<sup>7</sup> and also invested early on in its nationally-ranked community

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<sup>5</sup> <https://wraltechwire.com/2016/05/06/coworking-station-coworking-space-opens-in-holly-springs/>

<sup>6</sup> <https://www.businesswire.com/news/home/20220919005126/en/THRIVE-Coworking-Acquires-Coworking-Station-in-Holly-Springs-NC>

<sup>7</sup> <https://edpnc.com/incentives/workforce-training-and-development/>

college system. Wake Tech Community College serves 64,000 students, the third largest undergraduate enrollment of any North Carolina college or university, and works closely with corporate partners<sup>8</sup> to offer new certifications and programs to support talent pipeline development in growing industries like Software Development and Industry 4.0.<sup>9</sup>

The state continues to prioritize and invest heavily in workforce development. In **2021, the State of North Carolina released its “First in Talent” Strategic Plan**, a comprehensive economic development plan that identifies 3 key goals critical to the state’s economic development strategy over the course of 4 years. With a focus on workforce development and talent pipeline development, the following key goals were outlined within the plan:<sup>10</sup>

- Prepare North Carolina’s workforce for career and entrepreneurial success.
- Prepare North Carolina’s businesses for success by growing and attracting a talented workforce.
- Prepare communities across North Carolina to be more competitive in growing and attracting a talented workforce and businesses.

Furthermore, Governor Cooper's NC Job Ready initiative outlines a plan for enhancing the preparedness of North Carolinians for both current and future job opportunities. This plan revolves around three fundamental principles:<sup>11</sup>

- Skills and educational attainment
- Employer leadership, as employers are in the best position to identify the necessary skills for their workforce
- Encouraging local innovation, leveraging successful community-based workforce development models already in place, and expanding these creative solutions across the state

Additionally, this initiative introduces new programs like Finish Line Grants, designed to assist community college students in covering unexpected expenses that may hinder their progress toward program completion. Moreover, the NC Works Local Innovation Fund aims to support the inception or expansion of local workforce development initiatives.

## Workforce Development Implementation Across the State

These initiatives showcase North Carolina's commitment to workforce development and innovation, addressing the needs of various demographic groups and industries in the state.

### [K-64 Catawba County Program](#)

Launched in 2017, the K-64 initiative is a public-private partnership created by the Catawba County Commissioners and operated by Catawba Valley Community College. The key focus of K-64 is to prepare students for local in-demand careers throughout their lifetime from kindergarten (K) through the typical retirement age (64). The K-64 initiative builds on the existing success of proven

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<sup>8</sup> <https://www.waketech.edu/post/wt-news-story/9363>

<sup>9</sup> <https://www.waketech.edu/post/wt-news-story/12418>

<sup>10</sup> <https://www.commerce.nc.gov/data-tools-reports/economic-development-reports/strategic-economic-development-plan-north-carolina>

<sup>11</sup> <https://ncjobready.nc.gov/>



best practices by identifying, inventorying, and expanding programs that are effective in at least one of three areas: (1) working in partnership with local employers to design educational curricula that correspond with workforce demands, (2) providing students early exposure to career options and associated education and training requirements, or (3) supporting ongoing skill development for adults. A Commissioner-appointed, 12-member Board of Directors provides leadership for the K-64 initiative.

#### [Backpacks to Briefcases](#)

Backpacks to Briefcases was initially implemented in the Capital Area workforce development region, and, due to its success, has been replicated in other workforce areas. The program went on to win a national University Economic Development Association (UEDA) best practice award in 2012. Currently, the Mountain Area, Capital Area, Kerr-Tar, and Cape Fear workforce development boards all have Backpacks to Briefcases programs in their areas, with other areas looking to start. The Backpacks to Briefcases program provides recent graduates with real-world job experience and the opportunity to demonstrate their skills and abilities, ultimately leading to employment. The initiative helps transition students from college to the workforce, providing jobs for individuals and supplying employers with college-educated talent. In the Capital Area workforce region, 106 recent college graduates have been served to date. Out of 78 participants who have completed the program, 67 are currently employed or have gone on to graduate school, achieving an 86% overall placement rate. Of 44 recent college graduates surveyed, individuals received an 87% average wage increase from \$8.39/ hour pre-enrollment to \$19.09/hour post-internship.

#### [Line Worker Pre-Apprentice Program](#)

The Line Worker Pre-Apprentice program helps fill the growing demand for, and widening shortage of, certified electrical line workers. The program offers students an opportunity for a career that pays a livable wage and affords opportunity for advancement without college debt. It also provides career training options for students who want solid, hands-on careers but do not necessarily want a traditional college degree. This program demonstrates how communities and organizations can pool resources together to maximize benefits for everyone. Initially spearheaded by the Town of Benson with an idea and a generous in-kind grant, the other towns and ElectriCities pooled their physical and human resources to provide the backing necessary to enable the opportunity to be offered to Johnston County Public School students.

For a full list of success stories provided by the NC Works Commission, [visit the "Spotlight on Local Workforce Innovations: on their webpage."](#)

### Workforce Development for Zebulon

#### [Zebulon's Labor Force](#)

To understand the ways in which the Town of Zebulon might engage in workforce development initiatives, it is important to review the current labor force demographics. Pulled below are a few data sets which compare Zebulon with portions of the Eastern Research Triangle region (Clayton, Rocky Mount and Wilson) as well as Raleigh.

### Education of Population

Average of High School Graduate or Higher, Percent of Persons Age 25 Years+ 2017-2021	
Rolesville	97%
Clayton	94%
Knightdale	93%
Raleigh	92%
Wendell	92%
Rocky Mount	87%
Wilson	82%
Zebulon	74%

*Chart 1; Data Source: Census Bureau*

Bachelor's degree or higher, Percent of Persons Age 25 years+ 2017 - 2021	
Rolesville	64%
Raleigh	52%
Knightdale	44%
Wendell	31%
Clayton	30%
Zebulon	23%
Wilson	22%
Rocky Mount	22%

*Chart 2; Data Source: Census Bureau*

**Seventy-four percent of Zebulon residents aged 25+ years and older have completed high school or obtained higher degrees.** As reflected in Chart 1, Zebulon currently has the lowest percentage among its neighbors, Wilson (82%) and Rocky Mount (87%), with a much larger delta when comparing overall data to the remaining neighbors who are close to having 100% of their relative residents with high school diplomas or higher.

When reviewing Residents with a Bachelor's Degree or Higher in Zebulon, 22% of its population aged 25 years and older have obtained a bachelor's degree or higher. This statistic falls in line more closely with Zebulon's neighbors: Wilson (22%) and Rocky Mount (22%), with a slightly heavier concentration in Clayton (30%) and Wendell (31%), yet lower than Knightdale (44%) and less than half that of Raleigh (52%) and Rolesville (64%).

### Labor Force Participation

In Civilian Labor Force, Percent of Population Age 16 years+ 2017 - 2021	
Knightdale	78%
Clayton	70%
Raleigh	70%
Wendell	69%
Rolesville	65%
Wilson	60%
Rocky Mount	58%
Zebulon	58%

Chart 3; Source: Census Bureau

As reflected in Zebulon Today's report, Zebulon has maintained a consistently lower labor force participation rate than Raleigh. If we compare among additional neighboring areas as reflected in Chart 3, Zebulon still maintains an equal or lower labor force participation rate with 58% of its working age population maintaining employment and Rocky Mount and Wilson in similar positions (58% and 60% respectively). Rolesville (65%) and Wendell (69%) have higher percentages of active labor force population. Raleigh and Clayton are consistently higher at 70% and Knightdale is higher yet at 78%.

### Areas of Focus

Based on the above labor force demographics, it will be advantageous for the Town of Zebulon to explore the following:

- Understand what challenges exist for students who are not able to complete high school degrees & work to remove these barriers so that Zebulon can increase its percentage of the population with a high school degree
- Ensure there are clear career pipelines available for high school graduates to enter the workforce or continue their education
- Understand the barriers and challenges that are keeping residents out of the workforce and implementing/activating programs within the Town to increase labor force participation

It is also worth noting that although Zebulon's percentage of population with bachelor's degrees or higher is lower than that of Clayton and Raleigh, the Town should continue to see the educational attainment levels of its residents increase naturally due to new movers coming from across the country and globe. According to the US Census, 75% of new movers to Wake County age 25 and older are bringing at least a bachelor's degree or higher. It should also be noted that there are more opportunities for these new movers to access jobs outside of Zebulon and within the Research Triangle as there are typically less barriers to transportation for this population. The same cannot be said for underserved and less educated populations within Zebulon, who are likely facing a multitude of challenges that will either keep them out of the workforce or in jobs that are close-by/accessible via public transportation.

## Areas for Engagement

### **Engage in Wake County Economic Development's 2023 [Regional Skills Analysis](#) & Talent Pipeline Initiatives**

Every 3 years, Wake County Economic Development (WCED) leads a region-wide existing industry survey to understand and accomplish the following:

- Understand both short and long-term hiring needs;
- Inform training and education providers of the current workforce needs;
- Provide current workforce information for policy makers in workforce, education, and economic development;
- Develop an effective cradle-to-career talent pipeline strategy; and
- Create an efficient structure for ongoing industry feedback.

WCED recently completed their 2023 survey and will be working through analyzing results and creating a shareable document once the analysis is complete. This document has been followed in past years by a WCED-hosted event specific to this topic.

### **Partner with Wake Technical Community College for business recruitment, existing industry and strategies around upskilling the existing labor force in Zebulon.**

Located just 7 miles from Zebulon's Town Hall is the future Wake Tech "Eastern Wake 4.0 Campus." This campus provides tremendous opportunities in various aspects of Zebulon's economic development goals. Wake Tech has a long-standing history of partnership and collaboration with the K-12 public school system, industry and local governments.

Below are several examples of how this partnership could be utilized:

- **Existing Industry:** Partnerships between Zebulon's existing industry and Wake Tech can be utilized to create additional employment pipelines, strategic branding opportunities, and more involvement and buy-in from Zebulon's existing industry.
- **Business Recruitment:** This campus will also be a huge asset in the recruitment of new industry as it could provide temporary training space for new employees, a direct pipeline of workers, internship opportunities and more.
- **Opportunities for Continuing Education for Zebulon Residents:** Work in partnership with Wake Tech to identify, create and market opportunities for Zebulon residents to continue their education. According to Wake Tech, this particular campus offers transfer options for East Carolina University's Bachelor of Science in Industrial Technology (BSIT) program and Elizabeth City State University's Unmanned Aircraft Systems (UAS) and Emergency Management programs.<sup>12</sup> It will also be a new hub for Wake Tech's Associate in Engineering program, with spaces planned to further the college's collaboration with its largest and closest transfer partner, NC State.
- **Alignment with Industry Targets:** Wake Tech's program offerings have been determined based off of future growth projections in Eastern Wake County. As industry targets are identified for the Town of Zebulon, alignment with the programs and offerings provided at Eastern Wake 4.0 should be a strong consideration.
- **Small Business/Entrepreneurship:** Explore conversations with the college about incorporating co-working or incubator space within the campus.

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<sup>12</sup> <https://www.waketech.edu/post/wt-news-story/10785>

Overview of the Eastern Wake 4.0 Campus<sup>13</sup>

With a focus on technology-forward education and workforce development programs, Eastern Wake 4.0 is Wake Tech's newest site, along the Interstate 87/U.S. Highway 64 corridor in Wendell. Eastern Wake 4.0 refers to the term Industry 4.0, a reference to a fourth industrial revolution, with the convergence of machines and processes with information and communications technology, such as 5G, big data, cloud computing, and smart manufacturing. [Plans for the 106-acre site](#) include the following assets and programs:

- Public Safety Simulation Complex
- General Education and Students Services Building
- Technology 4.0 facility
- Associate in Engineering degree
- Emergency Medical Science
- Biopharmaceutical Technology
- Intelligent automation
- Robotics
- Unmanned Aircraft Systems operations and repair

## **BUSINESS RETENTION, RECRUITMENT, AND EXPANSION**

Developing and maintaining a comprehensive, long-term business retention, recruitment, and expansion (BRE) program will be a critically important piece of Zebulon's economic development strategy.

Existing businesses are often the most impactful component to a local economy, typically contributing 70 - 80% of new job growth and having the largest impact on a town's capital investment gains over time – allowing for funding of quality-of-life improvements for residents and bolstering and diversifying the overall economic ecosystem.

In addition, as Zebulon continues to grow and more investments stretch into eastern portions of the Research Triangle (including Franklin, Wilson, Edgecombe, Nash, and Johnston Counties), it will be critical for the Town to be aligned on the types of industries, corporate partners, and associated employment opportunities that are an optimal fit for the Town. Understanding this in detail will help inform future strategies involved in the business recruitment process and will allow the Town to play a more active and competitive role in the creation of new jobs and investment for the town.

### **Zebulon's Major Employers**

A review of Zebulon's major employers reveals that the Town has the foundations of a diversified ecosystem by hosting various industries, business operations and job opportunities for people with different skills sets and educational attainment. Industries and operations in Zebulon range from Life Sciences, Advanced Manufacturing, Food Distribution, R&D facilities, corporate and global headquarters, and operations with headquarters internationally.

One of Zebulon's key pillars of industry is Life Sciences, with GSK Pharmaceuticals leading the charge. The town is home to GSK's Quality Assurance (QA) laboratories, warehouse facilities, and

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<sup>13</sup> <https://www.waketech.edu/about-wake-tech/campuses-centers/eastern-wake>

production lines for blending, filling, assembly, and packaging, offering employment opportunities at varying levels of educational attainment. Their presence underscores Zebulon's seat at the table in what has become one of the strongest, long-standing industries for North Carolina and in particular, the Research Triangle Region.

Advanced Manufacturing and Research and Development (R&D) also play a pivotal role in Zebulon's economic landscape, thanks to companies like Nomaco, which has its Corporate HQ and Manufacturing & Innovation Center in Zebulon, contributes significantly to advanced manufacturing and cutting-edge R&D. Vinventions, with its Global HQ in the town, further enhances Zebulon's reputation as a center for innovative manufacturing.

In the realm of Food Distribution, Zebulon hosts US Foods, a major Food Distributor and Restaurant Supplier, adding to the town's diversity and joining portions of the Eastern Triangle Region where this industry has played an impactful role on new job creation and capital investment.

## BRE Program Best Practices

To foster ongoing growth within the community, the Town of Zebulon should not only lay a solid groundwork for existing businesses and promote new development, but it should also explore the following best practices for a high-functioning BRE Program. These practices aim to facilitate improved communication of the needs of existing businesses, provide them with better access to relevant resources, and encourage a deeper commitment to the community's sustained growth over the coming decades. The following sections are broken out by **Business Recruitment** and **Business Retention & Expansion**.

## Business Recruitment

When exploring an optimal business recruitment strategy, it will be critical for the Town of Zebulon to be specific and aligned on the types of industries, corporate partners, and associated employment opportunities that are an optimal fit for the Town.

### Opportunity Industries – Brookings Institution<sup>14</sup>

If we look at Zebulon's educational attainment levels, referenced in the "Workforce Development" section above, we see that the town has a higher percentage of residents who have a high school level education (74%) and a lower percentage (23%) who bring a bachelor's degree or higher. In addition, this Environmental Assessment showcases higher concentrations of minority populations in Zebulon. Because of this, as Zebulon looks to bring new jobs and diversify their tax base with new industry, it will be important to approach a business recruitment strategy that takes into consideration opportunities that will benefit the entire economic ecosystem.

One approach that is worth exploring further is the concept of "Opportunity Industries" by the Brookings Institution. In 2018, the Brookings Institution conducted a series of reports on "Good Jobs," "Promising Jobs," and "Opportunity Industries" – all of which explored **industries and associated job opportunities that have the potential to drive economic growth and provide opportunities for upward mobility to underserved and marginalized populations.**

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<sup>14</sup> [https://www.brookings.edu/wp-content/uploads/2018/12/2018.12\\_BrookingsMetro\\_Opportunity-Industries\\_Report\\_Shearer-Shah.pdf#page=6](https://www.brookings.edu/wp-content/uploads/2018/12/2018.12_BrookingsMetro_Opportunity-Industries_Report_Shearer-Shah.pdf#page=6)

When exploring Opportunity Industries, Brookings starts first by defining the “Good Jobs” and “Promising Jobs” listed below:

- **Good Jobs:** Good jobs are those that offer at least the local MSA median annual income for full-time, year-round workers without a bachelor's degree and include employer-provided health insurance. This approach ensures that the income threshold accounts for variations in wages and living costs across different metropolitan regions. The presence of employer-sponsored health insurance is used as an indicator for the availability of other benefits, like paid leave and retirement plans.
- **Promising Jobs:** These jobs are entry-level positions that may not initially meet the criteria for being considered good jobs. However, based on an analysis of historical job-switching patterns and future projections, these positions are expected to offer career progression opportunities that will enable the workers in those roles to reach good jobs within a decade. This prediction is made using a unique analysis of past trends in occupational mobility, forecasting how workers will transition between occupations over the next 10 years.

Findings from the study as it pertains to industries that provide the most opportunity for upward mobility and overall improved quality of life for underserved and marginalized populations revealed the following key takeaways, relevant for the Town of Zebulon to consider when forming their future strategy:

- **Industries that are considered 'tradable' offer some of the best opportunities for individuals without a four-year college degree to secure good jobs.** Tradable industries are those where companies primarily sell their products or services to customers outside the region, competing on national and global scales. These industries, which include sectors like **manufacturing, software, higher education, and freight transportation**, are the ones that generate significant wealth for the local economy. In turn, they support local-serving industries, such as retail, food services, and basic healthcare, which primarily serve consumers within the region.
- **Interestingly, tradable industries in sectors typically associated with white-collar jobs, such as information, corporate headquarters, and professional services, also offer above-average proportions of good jobs for sub-baccalaureate workers, with percentages ranging from 13 to 15 percent.**
- **Although local-serving industries like hospitality and retail sectors are among metropolitan area's largest sources of jobs, they provide some of the lowest concentration of good jobs.** Overall, the report found that most jobs in local-serving industries offer neither good nor promising jobs, apart from construction and utilities sectors that primarily serve local consumers. **The construction and utilities sectors, in this case, offer good jobs for sub baccalaureate workers at a rate above the economy-wide average.**

The findings and recommendations around industries that provide access to Good Jobs are aligned with industry cluster strengths that we see across the Research Triangle. A key factor in the success

of the Research Triangle is a diverse industry base and diversified economic ecosystem that includes 3-tier 1 research universities, a thriving community college system and collaborations among industry, education, and government.

This diversity has contributed to consistent, above national average economic growth since the 2008 recession and a major reason that the region was consistently predicted to weather the effects of the COVID-19 pandemic.

**Companies within the following industries continue to strongly consider the Research Triangle as a prime location to land and expand their business:**

- Life Sciences
- Advanced Manufacturing
- Clean Technology
- Software Development/Information Technology
- Agricultural Technology (Ag Tech)
- Food, Beverage & Agriculture Manufacturing
- Chemicals, Plastics and Rubber Manufacturing

When considering the foundations of a recruitment strategy, Zebulon does not need to re-invent the wheel in terms of industries recruited but instead should focus on the types of operations, employment breakdowns (associated salaries, entry level vs. mid to advanced level), their associated educational attainment requirements, and overall corporate policies that support upward mobility for residents. Once the Town is aligned on these critical pieces, a more traditional approach can be crafted to ensure Zebulon can be an active player in a competitive site selection/business recruitment process.

## Business Retention & Expansion

The Town of Zebulon will need to develop a comprehensive existing industry program tailored to the specific needs of its businesses. In creating such a program, two best practices should be given strong consideration for ensuring its success. The first best practice involves fostering a high-touch environment by leveraging state and regional partners and resources. The second is to actively promote and identify opportunities for existing industry engagement in local and regional economic development as well as community initiatives. Both best practices are detailed below.

### High Touch Environment

As the Town of Zebulon balances multiple priorities, it will be beneficial to approach existing industry support by working in partnership with multiple state, regional and local industry support organizations. If consistent check-ins and relationships are maintained with the appropriate organizations, these partnerships are a value-add to a comprehensive existing industry program and to the Town's resources by allowing individual outreach, support, and interactions to be an extension of the Town. This also allows the Town and its partners to identify industry challenges, companies that may need immediate attention, opportunities for industry-driven partnerships and more.

Resources:

- Wake County Economic Development



- Economic Development Partnership of North Carolina's (EDPNC) Existing Industry
- Wake Tech Community College Corporate & Business Solutions
- Capital Area Workforce Development Board
- Industry-driven support organizations like the North Carolina Biotechnology Center, NC Technology Association, NC State's Industry Expansion Solutions, NC State University's Office of Economic Development & Partnerships, etc.

### Existing Industry Engagement

In addition to wrapping existing industry in resources and support, it is equally important to identify and create ways for existing industry to become involved in local and regional economic development initiatives. Companies that are invested in their communities, whether with their time, knowledge, or finances, are much more inclined to work with economic development organizations when making decisions on whether to grow locally or relocate firms altogether. Engagement like this creates stronger advocacy for the Town of Zebulon by company leadership and can also in turn support business recruitment programs by "corporate ambassadors" spreading a positive message about operating in the Town of Zebulon as they travel to conferences, meet with companies in their supplier network, and more.

Below is an example of where and how to engage existing industry leadership locally and regionally. These are also areas that have become a key focus for state, regional and local leaders and would be a great place for Zebulon to plug in:

- Corporate investments in local innovative ecosystems
- Investment in talent pipeline/upskilling workforce
- Hosting industry & career days with K-12 schools school systems.
  - Example: [Summer Careers Pathways Program](#)
- Partnerships & branding opportunities with Wake Tech Community
  - Example: [Eli Lilly Example](#)
- [Triangle Diversity, Equity & Inclusion Alliance](#)
- Sustainability Initiatives
  - Wake County Economic Development [Initiatives Summary](#) & [Recent Event](#)
  - [North Carolina's Commitment](#)

## MARKETING

Upon the successful completion of the Economic Development Strategic Plan, Zebulon is poised to gain a comprehensive understanding of its identity, encompassing its strengths, weaknesses, and challenges, as well as its overarching priorities that will be part of creating sustainable economic growth and development. These critical insights will help determine the appropriate direction for a marketing strategy, including audiences, the types of messaging to prioritize and the best methods for sharing information and building Zebulon's brand externally. As Zebulon works through this process, several strategies, and pivotal questions to keep in mind are outlined below:

- **Establish a Unified Brand Identity:** Ensure that Zebulon Economic Development emerges as a consistent and easily discoverable brand name for all pertinent information and caters to diverse audiences.
- **Audience Segmentation:** Identifying and categorizing target audiences is important. Zebulon may determine its marketing should have more emphasis placed on its existing

community, rather than a heavy focus on outside parties (site selectors, developers, etc.). Alternatively, there may be higher prioritized commercial and industrial strategic goals that require Zebulon’s assets and brand to reach national site selectors and development groups. Going through the process to determine audiences and their associated priorities will help with curating and disseminating appropriate information.

Consider these audiences below:

- **Business Recruitment:** Engaging site selectors, companies exploring expansion opportunities, and prospective developers.
  - Resource for catering to Site Selectors: [DCI Best Practices](#)
    - Note: DCI is the national marketing brand contracted with WCED.
- **Existing Industry:** A platform to share valuable workforce development resources, programs, and success stories.
- **Small Business:** Providing support and resources for the local small business ecosystem. Zebulon will need to determine whether this will have its own brand or remain under Zebulon Economic Development.
- **Innovation & Entrepreneurship:** Sharing resources and stories that showcase and foster an environment that nurtures creativity and innovation.

**Online Presence:** Now more than ever, a community’s online presence is the most utilized and easily accessible format for sharing critical information and telling a unique story. Communities are investing in high-quality websites, videos, and even drone footage to reach broader audiences and create attention-grabbing and informative content to educate residents on economic development plans, and to attract companies and site selectors to the community by sharing regional strengths and local assets (existing workforce, land, and commercial spaces available, for example). Although prioritized differently, it will be important for Zebulon to identify ways to market information to each of these groups identified above, as well as any additional audiences that may be identified throughout the process. Making investments in a strong online platform and strategy is an excellent approach for conveying a consistent and distinctive message to multiple audiences. This approach also provides the flexibility for adapting to changes as Zebulon continues to evolve, ensuring that it reaches multiple and diverse audiences and attracts and retains assets that are aligned with the Town.

#### **Highlight Unique Differentiators:**

- Craft compelling narratives that showcase how local businesses in Zebulon are making a difference and experiencing growth.
- Work through narratives that share and celebrate the diversity of Zebulon (multi-racial, foreign-born, female dominant, etc.).
- Work to build media strategies with Wake County Economic Development and local media outlets to reach a regional and national audience.

**CEO Spotlights:** Produce engaging videos featuring the CEOs of Zebulon-based headquarters. Explore their reasons for choosing Zebulon, their growth journeys, and their experiences of living in Wake County while working in Zebulon. Notable success stories, such as Nomaco and Olde Raleigh Distillery, can serve as inspiring examples. This serves both the business recruitment audience, as well as giving residents overall “feel good” stories about their community.

**Leveraging the Research Triangle Ecosystem:** Maximize the extensive Research Triangle ecosystem to gather and distribute relevant news, blogs, and consistent messaging concerning economic development strategies, programs, and events across the Triangle region.

Topics to consider include:

- **Diversity, Equity, and Inclusion (DEI):** Showcase Zebulon’s commitment to fostering a diverse and inclusive community (relevant for community members, existing industry and business recruitment initiatives).
- **Sustainability:** Highlight the Triangle’s efforts towards a sustainable future (relevant for existing industry & business recruitment).
- **[Work in the Triangle:](#)** A resource created to accommodate the vast number of “new movers” to our region. This resource is for residents and employers alike, aiding in recruitment of talent, onboarding new employees and general quality of life benefits of living in the Triangle.
- **[Regional Skills Analysis:](#)** Providing insights into the local workforce, projected employment growth for existing companies, challenges and changes in talent pipeline and recruitment strategies and more.
- **Major Transportation Improvements:** Announcing significant public transportation enhancements throughout the Triangle.
- **Eastern Triangle Region Announcements:** Share updates on company initiatives and workforce development happening in neighboring counties.
- **Innovation and Entrepreneurship:** Highlight stories locally and across the region that support and encourage entrepreneurship and innovation.

By incorporating these strategies and addressing these questions, Zebulon can lay the foundation for a robust and effective marketing approach.

## INNOVATION/ENTREPRENEURSHIP

### Overview

The Research Triangle region boasts a vibrant and innovative ecosystem that revolves around collaboration, research, and entrepreneurship. Anchored by esteemed research institutions like Duke University, UNC Chapel Hill, and NC State University, the region serves as a breeding ground for groundbreaking research and knowledge creation. Research Triangle Park (RTP) acts as a central hub, bringing academia, industry, and government together for collaboration and commercialization. The region also benefits from a robust network of entrepreneurial support organizations, incubators, and accelerators that provide resources, mentorship, and funding for startups.

Although there are many existing resources to tap into, it will be advantageous for Zebulon to create an innovation brand and environment of their own that will encourage and foster entrepreneurship and new ideas, while giving their existing corporate partners an opportunity to collaborate.

### Entrepreneurship in Zebulon

Several NC State alums have started businesses in Zebulon: Tethis, Next Century Spirits, Old Raleigh Distillery, and The Fall Line. The success of Tethis meant that they outgrew their manufacturing

space; without adequate scalable manufacturing facilities in town, they had to move their operation to another city. Next Century Spirits created their patented filtering and finishing technology at NC State. They brought the company to Zebulon in 2022 to work with private labels to create custom distilled spirits. Olde Raleigh Distillery landed in Zebulon as a start-up in 2021. The proprietor renovated a space downtown and became a catalyst for business investment. Lastly, an NC State alumni created a widely-appreciated indoor/outdoor sports bar downtown and is starting a second business outside of downtown. The cost of real estate is lower than other areas of the Triangle and that could be a contributing factor leading to start-up companies locating in Town.

Below are several potential actions and best practice examples of how Zebulon might utilize existing resources while creating their own innovation brand and entrepreneurial environment:

- **Short-term:**
  - Engage with the many programs offered by the NCSU entrepreneurial program to promote Zebulon to the start-ups that may be interested in having the Town's Economic Development Specialist and Downtown Coordinator assist in navigating through the move to a brick-and-mortar location. The programs available are:
    - **Andrews Launch Accelerator:** 14-week accelerator program that pushes start-ups with current students or recent alums to the next growth stage. The participants receive some equity-free funding upon completion.
    - **Wolfpack Investor Network:** A network of angel investors for NC State affiliated early-stage companies, with \$20 million investment to-date in 34 portfolio companies.
    - **Albright Entrepreneurs Garage:** Students and start-ups share co-working space, use a prototype lab, participate in start-up competitions, and utilize the entrepreneurship clinic.
    - **Launch Pad Incubator:** Incubator program to support early-stage undergraduate and graduate start-ups. The Incubator occurs over a rolling 10-week period.
  - Have an existing firm be a key investor for the Innovation Ecosystem.
    - Utilize the existing success that Zebulon has experienced with start-ups out of NC State to build enthusiasm from existing company leaders.
    - Incorporate success stories into a marketing strategy (for example, via WRAL Tech Wire) that spreads the word across the region. Even companies that outgrew Zebulon should be considered a success story.
- **Mid-term:** Recruit a coworking or incubator/accelerator program, such as RIOT, to offer services to start-ups and small businesses located in Zebulon.
- **Long-term:** Facilitate investment in scalable advanced manufacturing facilities.
  - Recruit companies with R&D components.
  - Foreign-owned companies traditionally invest more in R&D than US-headquartered firms.

# PART 3: BEST PRACTICES TO MITIGATE DISPLACEMENT

## WHAT IS GENTRIFICATION AND DISPLACEMENT?

Increased economic investment in historically underserved neighborhoods often leads to gentrification of the area and displacement of its long-term residents. Gentrification is the economic and demographic evolution a neighborhood experiences when higher-income residents move in because of increased economic investment.<sup>15</sup> These movement patterns are inextricably intertwined with race and can vastly change the racial makeup of the affected neighborhoods. Ultimately, economic conditions lead to soaring rent prices (often exceeding 30% of the household's income) and increases in property taxes.

Displacement is the "forced or involuntary relocation of residents, including departure from a home or neighborhood where a tenant would otherwise have wanted to remain if not for socioeconomic or environmental pressures making that infeasible or undesirable."<sup>16</sup> Historic residents can be involuntarily displaced because of the unaffordability of the area.<sup>17</sup> Displacement has been a known issue for decades. In 1978, the Department of Housing and Urban Development defined displacement as:

"Displacement occurs when any household is forced to move from its residence by conditions which affect the dwelling or immediate surroundings, and which:

- are beyond the household's reasonable ability to control or prevent
- occur despite the household's having met all previously imposed conditions of occupancy; and
- make continued occupancy by that household impossible, hazardous, or unaffordable."<sup>18</sup>

There are three types of displacement that can occur because of gentrification:<sup>19</sup>

- **Direct:** One demographic or ethnic group succeeds another specifically due to a process or program. Typical in federal Urban Renewal programs in the 1950s and 60s.
- **Secondary or Involuntary:** Low-income households relocate due to new development or gentrification in their neighborhood once they can no longer afford to remain due to higher rents, appreciated taxes, tenant harassment, or the withholding of services.
- **Exclusionary:** Changes in a gentrified neighborhood prevent future low-income households from locating there.

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<sup>15</sup> <https://www.urbandisplacement.org/about/what-are-gentrification-and-displacement/>

<sup>16</sup> [https://harvardlpr.com/wp-content/uploads/sites/20/2019/02/20180813-1\\_Cohen.pdf](https://harvardlpr.com/wp-content/uploads/sites/20/2019/02/20180813-1_Cohen.pdf)

<sup>17</sup> [https://sites.duke.edu/christophertimmins/files/2021/11/displacement\\_paper\\_2021\\_11.pdf](https://sites.duke.edu/christophertimmins/files/2021/11/displacement_paper_2021_11.pdf)

<sup>18</sup> <https://www.frbsf.org/community-development/wp-content/uploads/sites/3/wp2015-05.pdf>

<sup>19</sup> <https://www.urban.org/sites/default/files/publication/50791/411294-In-the-Face-of-Gentrification.PDF>

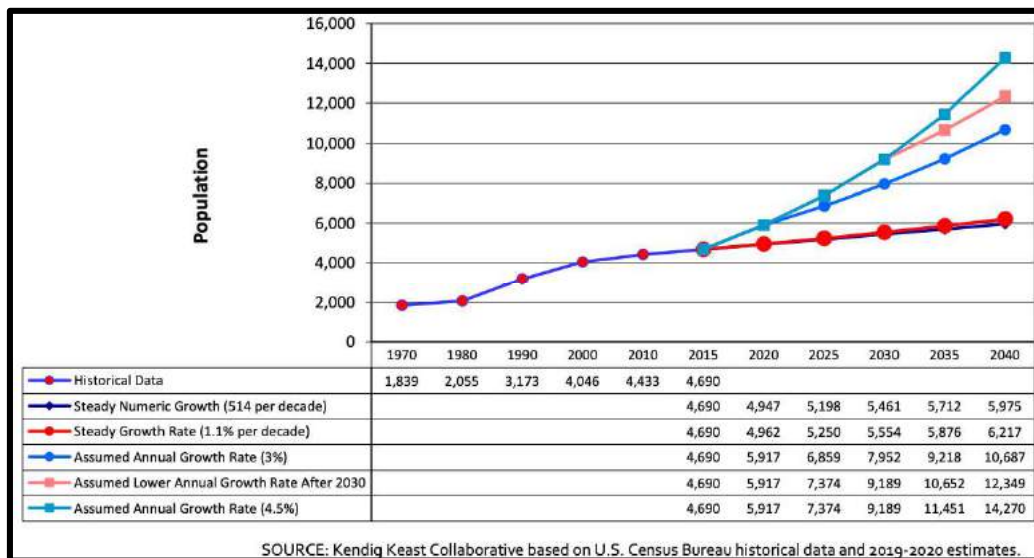
Therefore, local community planners must implement policy that captures the benefits of increased investment without harming or displacing current residents “that have weathered years of economic disinvestment.”<sup>20</sup>

## IMPACT OF DISPLACEMENT

Displacement leads to many devastating impacts on the residents forced to move. When people move from their community, it can lead to increased unemployment.<sup>21</sup> Children perform worse academically as they are often placed in schools with fewer resources.<sup>22</sup> Additionally, seniors experience higher mortality rates because they lose their network of care and support.<sup>23</sup>

Moreover, as residents involuntarily leave their community, the culture associated with the historic neighborhood loses its cultural identity. Between 2010 and 2020, the Metropolitan Statistical Area (MSA) of Austin, Texas saw a 33% population increase, making it one of the most rapidly growing regions in the nation.<sup>24</sup> However, it did not come without its consequences. The influx of new residents transformed the city, once known for its “weirdness,” into an unrecognizable “tech metropolis”.<sup>25</sup>

As Zebulon anticipates significant population growth and seeks to bolster its downtown district, it must be especially cognizant of retaining its “small town life” focus area as outlined in the 2018-2030 strategic plan. As seen below, Zebulon’s population of 6,903 residents during the 2020 Census exceeded the highest projection.<sup>26</sup>



<sup>20</sup> <https://www.urban.org/sites/default/files/publication/50791/411294-In-the-Face-of-Gentrification.PDF>

<sup>21</sup> [https://nlihc.org/sites/default/files/HPD\\_Gentrification\\_cDOH.pdf](https://nlihc.org/sites/default/files/HPD_Gentrification_cDOH.pdf)

<sup>22</sup> <https://www.theatlantic.com/education/archive/2015/04/the-lost-children-of-katrina/389345/>

<sup>23</sup> [https://webarchive.urban.org/UploadedPDF/311489\\_HOPEVI\\_Health.pdf](https://webarchive.urban.org/UploadedPDF/311489_HOPEVI_Health.pdf)

<sup>24</sup> <https://www.austinchamber.com/economic-development/austin-profile/population/overview>

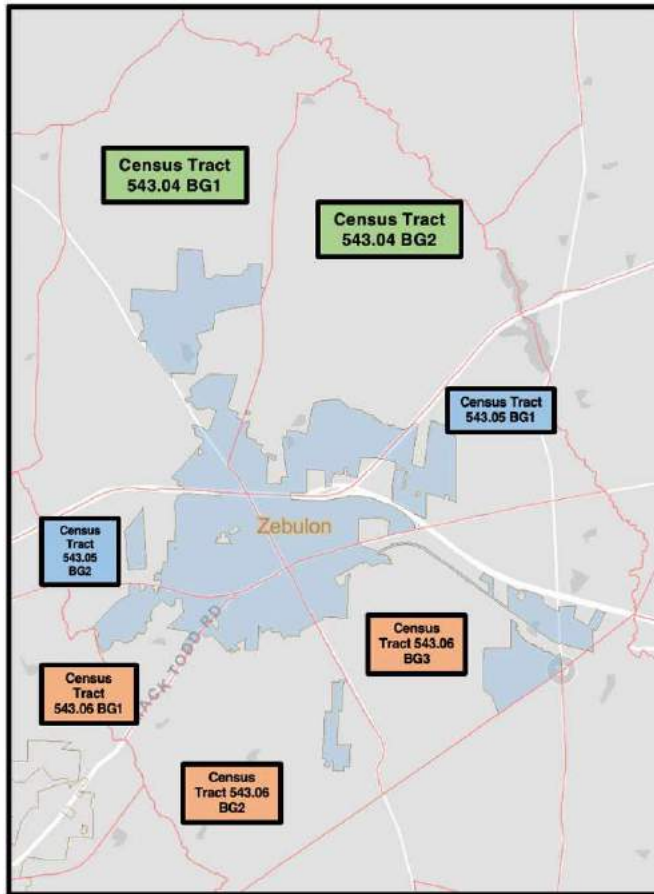
<sup>25</sup> <https://www.newyorker.com/magazine/2023/02/13/the-astonishing-transformation-of-austin>

<sup>26</sup>

[https://data.census.gov/map?q=zebulon,+nc&t=Populations+and+People&layer=VT\\_2020\\_160\\_00\\_PY\\_D1&mode=thematic](https://data.census.gov/map?q=zebulon,+nc&t=Populations+and+People&layer=VT_2020_160_00_PY_D1&mode=thematic)

Chart 4; Source: Census Bureau

## WHERE DO HISTORICALLY UNDERSERVED POPULATIONS LIVE IN ZEBULON?



Historically underserved communities bear the brunt of the effects of gentrification. The Town of Zebulon is broken down into three census tracts that are clearly stratified by income and race. Census Tract 543.04 Block Groups one and two, 543.05 Block Groups one and two, and 543.06 Block Groups one, two, and three are shown below.

Specifically, Census Tract 543.06 Block Groups one and two are vulnerable to gentrification and displacement because of the high rate of renters, low median household income, and diverse population. This area is also home to Zebulon's only Section 8 housing development, Shannon Drive Apartments, funded through the Wake County Housing Authority.<sup>27</sup> The area is furthermore referenced as a potential "high interest" area in Zebulon's Comprehensive Land Use Plan.

Town of Zebulon																		
Census Tract	543.04 Block Group 1				543.04 Block Group 2				543.05 Block Group 1		543.05 Block Group		543.06 Block Group 1		543.06 Block Group 2		543.06 Block Group 3	
Population (P5)	3,294				2,334				1,374		2,177		1,232		1,653		750	
White Population	56.5%				57.3%				43.2%		47.0%		39.6%		36.1%		51.2%	
Black Population	25.7%				24.8%				33.3%		33.1%		40.9%		33.0%		26.0%	
Hispanic Population	11.8%				12.3%				16.2%		13.0%		14.9%		25.9%		17.2%	
Native, Asian, Pacific Islander, Two or more	6.0%				5.6%				7.3%		6.9%		4.5%		5.0%		5.6%	
Median HH Income (B19013)	\$87,708				\$93,514				\$88,784		\$59,350		\$44,986		\$21,744		\$70,800	
Occupied Housing Units   Total Housing Units (H1)	1,154	1,200	834	898	519	538	833	885	453	472	593	635	288	308				
Occupancy %	96%				93%				96%		94%		96%		93%		94%	
Ownership   Rent (B25003)	100%	0%	92%	8%	68%	32%	75%	25%	64%	36%	41%	59%	77%	23%				
Poverty	4.90%				10.60%				17.60%									

\*All data is derived from the 2020 Census and annual American Community Survey.

Chart 5; Source: Census Bureau

<sup>27</sup> <https://www.wakecountyha.org/locations/map>

# CURRENT BEST PRACTICES AND CASE STUDIES

As gentrification begins to affect communities, there are tools that planners can use to prevent the negative consequences from dividing communities.

Levy, Comey, and Padilla at the Urban Institute divide gentrification into three stages, although there is no definitive measure that identifies which stage a community is experiencing.

- **Early stage** – There is evidence of revitalization in the form of housing improvements and increases in housing prices compared to surrounding communities.
- **Middle stage** – Housing prices have risen sharply, however there remain small portions of the community with affordable housing and undeveloped land.
- **Late stage** – There is little to no affordable housing, housing prices are not attainable for middle-class and below families, and there is no remaining developable land.

Implementing best practices in the early stage would be most effective based on an analysis of Zebulon’s Comprehensive Land Use Plan, housing market analyses, and Census data. However, that could quickly change as Zebulon is the second-fastest growing Town in North Carolina and welcomed 12 new businesses since 2019.<sup>28</sup>

## Best Practice 1: Community Wealth Building

Supports Zebulon 2030 Strategic Plan’s Growing Smart Tactical Action: Pursue economic development opportunities with our community partners.

Community wealth building (CWB) is an economic development practice that is focused on the residents of a community retaining power and control of assets.<sup>29</sup> CWB heavily relies on regulatory support from public institutions and on capital from private “anchor” institutions. This public-private partnership funds locally owned cooperatives that are staffed by community members and invests in local real estate to specifically prevent displacement. Anchor institutions are key to this model because of their leverage in the private market. Wake County is home to several potential anchor institutions because it is home to prominent tech companies, universities, and healthcare systems. Examples include IBM and Red Hat, Duke Health Systems, SAS, WakeMed Health and Hospitals, North Carolina State University, and Research Triangle Institute (RTI).

### Case Study: Cleveland, Ohio Evergreen Cooperatives

In 2008, the Cleveland Foundation, the Cleveland Clinic, Case Western Reserve University, and the municipal government launched the Evergreen Cooperative Institute. They focused on creating sustainable living wage jobs in Cleveland’s historically impoverished neighborhood, Greater University Circle.<sup>30</sup>

The Evergreen Cooperative Institute (ECI) first launched, Evergreen Cooperative Laundry, which partnered with local hospitals that partnered with the anchor institutions. The ECI would provide laundry services with a locally staffed workforce (focused on individuals with limited education, non-violent criminal backgrounds, or did not have the training to get jobs in the local market).

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<sup>28</sup> <https://spectrumlocalnews.com/nc/charlotte/news/2022/06/30/zebulon-is-booming>

<sup>29</sup> <https://democracycollaborative.org/programs/cwb>

<sup>30</sup> <https://www.evgoh.com/about-us/>



Additionally, the ECI used a cooperative model, so that employees bought-in to their work and over time accumulated wealth for themselves. Now, ECI is profitable, they employ approximately 120 people, and are earning revenue outside of the anchor.<sup>31</sup>

## Best Practice 2: Community Land Trusts

Supports Zebulon 2030 Strategic Plan's Growing Smart Tactical Action: Plan for appropriate land use to meet transportation and housing needs.

Community land trusts are another effective form of CWB. In their simplest form, community land trusts buy properties and keep them affordable.<sup>32</sup> Community land trusts are nonprofit, community-based organizations whose mission is to provide affordable housing in perpetuity by owning land and leasing it to those who live in houses built on that land.<sup>33</sup> Once the community land trust owns the property, they are able to determine how the land is used and ensures its alignment with community needs and goals. Often homes or other buildings can be built or placed on the owned land. These homes are then sold to individuals at below-market prices, making them more affordable. While many community land trusts focus on affordable housing, they can also serve other community goals. Land can be used for commercial spaces, community centers, urban agriculture, or preserving open spaces, among other uses. They prioritize community needs and goals over private profit, and a tool to fight against displacement caused by rising land prices and gentrification.

### Case Study: Raleigh Area Land Trust

The Raleigh Area Land Trust (RALT) focuses on affordable housing opportunities for first-time homebuyers in the Greater Raleigh Area and across Wake County.<sup>34</sup> The RALT board consists of prominent local stakeholders that are devoted to their community. RALT offers homeownership opportunities and rental to residents at 50% to 80% of the area median income. Additionally, this past June, the City of Raleigh and RALT partnered together to sell their first affordable home in the area. This is significant because it provides a framework for local governments to become involved with community land trusts. The City of Raleigh provided a 0% interest, deferred payment loan to RALT for \$130,000. RALT used that loan to refurbish and restore two homes and sell it to qualified buyers.

Raleigh also selected RALT to serve as the developer for the Idlewild Avenue area in downtown Raleigh. The City of Raleigh sold the land to RALT for \$1, and in return, RALT will construct the Cottages of Idlewild, an 18-unit development in a predominantly underserved side of town.<sup>35</sup>

## Best Practice 3: Preservation of Unsubsidized Affordable Housing

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<sup>31</sup> <https://www.usnews.com/opinion/articles/2016-07-21/evergreen-cooperative-is-a-cleveland-jobs-success-story>

<sup>32</sup> <https://www.npr.org/2023/04/09/1168839399/community-land-trusts-are-providing-a-solution-to-gentrification>

<sup>33</sup> <https://www.lincolnst.edu/publications/articles/community-land-trusts>

<sup>34</sup> <https://www.ralt.org/>

<sup>35</sup> <https://raleighnc.gov/housing/news/raleigh-area-land-trust-sells-first-affordable-home>

Supports Zebulon 2030 Strategic Plan's Growing Smart Tactical Action: Plan for appropriate land use to meet transportation and housing needs.

The United States' largest supply of affordable housing, or naturally occurring affordable housing (NOAH), are homes that are affordable due to their age or condition. It is estimated that 76% of all affordable housing in the United States are NOAH homes.<sup>36</sup> NOAH homes are often not well-kept, intentionally, or unintentionally, and are in areas susceptible to gentrification because of their low cost. Moreover, NOAH renters are often people of color. Therefore, when NOAH properties are sold to development companies and they are refurbished and restored, tenants are either evicted or offered "cash for keys" by the development company to replace them with more affluent tenants.

Local governments can preserve NOAH homes by simply bringing awareness to them. By beginning to identify the current supply of NOAH homes in Zebulon, efforts can be taken to preserve them through other means. For example, leveraging existing partnerships with Wake County and using the existing Community Development Block Grant are steps the Town can take to provide additional assistance to residents in NOAH homes. By maintaining a clear picture of the current market, it ensures that the currently supply of affordable houses are naturally maintained.

Local governments can also partner with private developers to offer subsidies, and, in exchange, guarantee that they will keep prices affordable on properties.

### *Case Study: City of Charlotte Pilot Naturally Occurring Affordable Housing Subsidy Program*

In 2020, the City of Charlotte took decisive action to preserve 20,000 NOAH homes in the greater area. The City partnered with private partners who pledged to keep the homes affordable, and they focused on the population that was in the 30%-80% of the area median income. Charlotte also established a rental subsidy program to participating developers and owners which was capped at the city's annual property tax bill. The program was designed to cover the difference between the tenant's payment and rent on the unit. In exchange, developers and landlords agreed to: 80 percent of units occupied by households earning at or below 80 percent area median income (AMI); 20 percent of units occupied by households earning at or below 30 percent AMI, using the NOAH rental subsidy program or other subsidy source (e.g., housing choice vouchers); 10 percent of units occupied by households at or below 30 percent AMI, subsidized entirely through the NOAH rental subsidy program.

In 2018, the City of Charlotte ultimately voted to increase their Housing Trust Fund from \$15M to \$50M to devote more resources to preserving NOAH properties.<sup>37</sup>

## Best Practice 4: Targeted Hiring Through Ordinance

Supports Zebulon 2030 Strategic Plan's Growing Smart Tactical Action: Pursue economic development opportunities with our community partners.

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<sup>36</sup> <https://www.mckinsey.com/industries/public-sector/our-insights/preserving-the-largest-and-most-at-risk-supply-of-affordable-housing>

<sup>37</sup> <https://www.adaptationclearinghouse.org/resources/greauxing-resilience-at-home-eo-city-of-charlotte-north-carolina-pilot-naturally-occurring-affordable-housing-noah-subsidy-program.html>

Targeted hiring is an economic development strategy that requires private businesses contracted by a government entity to hire a certain demographic within the local population.<sup>38</sup> Local governments typically establish a minimum percentage that businesses must employ for publicly funded projects. By creating an ordinance, it gives control to the local municipality for the job inclusion of the projects. Moreover, it empowers the community and provides valuable jobs and training to those with unique needs. This practice ensures that jobs are held in the community, and that the local population has opportunities to build wealth.<sup>39</sup>

### *Case Study: UNC Charlotte Strategy: Physical Location of Workforce*

As a state entity, UNC Charlotte prefers hiring from the North Carolina workforce. The university has facilitated this priority and responsibility by placing the following restrictions on out-of-state employees:

- Out-of-state contracts are temporary with terms limited to one year and requiring annual approval for renewal.
- UNC Charlotte will withhold prorated income taxes for no more than one state in a single pay period.
- Remote work must use University-managed devices.
- An approval form must be completed and approved prior to an employee performing work outside the state for more than one month.
- These restrictions increase the costs of out-of-state employment for both the university and the employee.

### *Case Study: Milwaukee Resident Preference Program (RPP)*

Milwaukee currently runs the Resident Preference Program which, “promote[s] the use of city residents as part of a contractor’s or developer’s workforce on certain city-funded construction and private development projects.”<sup>40</sup> Contractors awarded projects through the city of Milwaukee are typically required to hire 40% of RPP participants. The City of Milwaukee targets RPP participants based on unemployment history and stipulates that the individual:

- Has not worked in preceding 15 days AND/OR
- Worked less than 1,200 hours in the preceding 12 months AND/OR
- Meet certain federal poverty guidelines.

## Additional Best Practice Notes

Rent control, one of the most widely referenced anti-displacement tools, is not legal in North Carolina. “No county or city as defined by G.S. 160A-1 may enact, maintain, or enforce any ordinance or resolution which regulates the amount of rent to be charged for privately owned, single-family or multiple unit residential or commercial rental property.”<sup>41</sup>

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<sup>38</sup> <https://www.americanprogress.org/article/localized-anti-displacement-policies/>

<sup>39</sup> <https://escholarship.org/content/qt3z14x2t5/qt3z14x2t5.pdf?t=ny9ne8&v=lg>

<sup>40</sup> <https://escholarship.org/uc/item/3z14x2t5>

<sup>41</sup> [https://www.ncleg.gov/enactedlegislation/statutes/pdf/bysection/chapter\\_42/gs\\_42-14.1.pdf](https://www.ncleg.gov/enactedlegislation/statutes/pdf/bysection/chapter_42/gs_42-14.1.pdf)

Accessory Dwelling Units are a unique workaround to the housing supply. They allow tenants to build smaller dwellings on their property, and it is allowed by-right in Zebulon, as outlined in the Unified Development Ordinance.<sup>42</sup>

Inclusionary zoning leverages zoning power at the local level to work with private developers to construct affordable housing.<sup>43</sup> However, in North Carolina it is hard to effectively implement as inclusionary zoning is not specifically illegal or legal. Davidson, NC currently requires that 12.5% of the total units in a new development must be within a percentage of the local AMI. Developers can choose to opt-out of that requirement; however, they must pay into Davidson's Affordable Housing Trust Fund.<sup>44</sup> Davidson ran into legal challenges from the Lennar Corporation when they did not include affordable housing units in a new development and challenged the requirement to pay into the fund.

## COMMERCIAL GENTRIFICATION

Wake County's rapid population growth and influx of large tech corporations in the past ten years is promising for the economic health of Zebulon but can pose a risk to small businesses that contribute to the Zebulon's "small-town charm and heritage" and "Town of Friendly People."

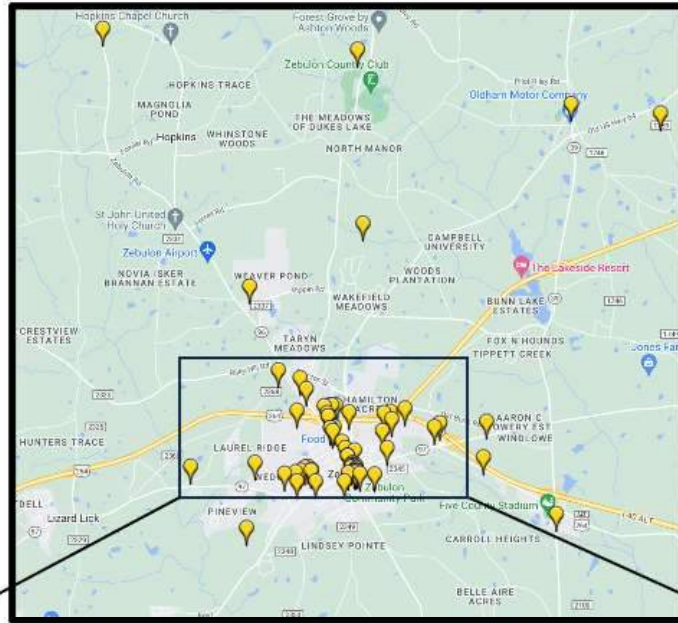
The Zebulon Chamber of Commerce maintains a robust network of small businesses in the area. As seen in the map below, a large concentration of small businesses are located in the downtown area.

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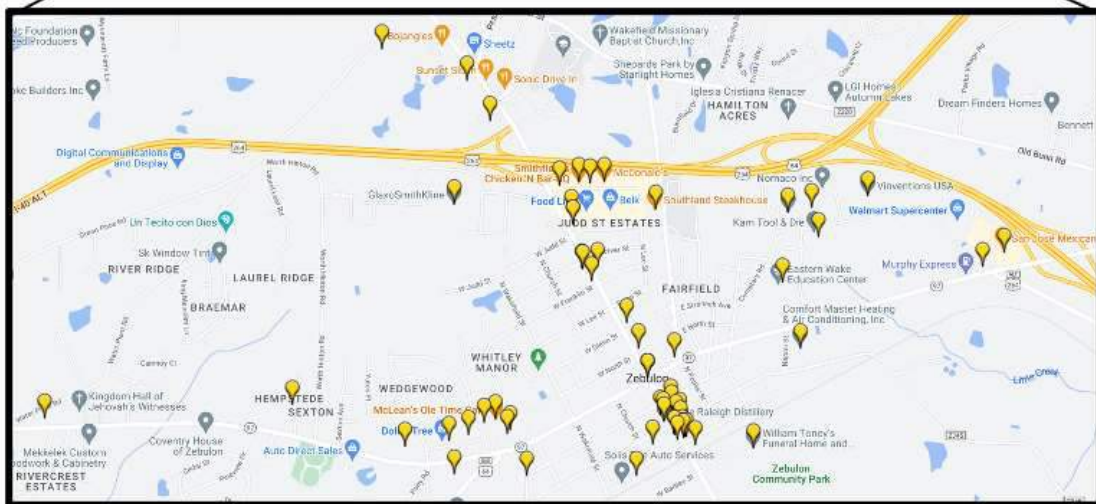
<sup>42</sup> [https://www.townofzebulon.org/sites/default/files/uploads/planning/zebulon\\_udo\\_phd\\_9-28-19.pdf](https://www.townofzebulon.org/sites/default/files/uploads/planning/zebulon_udo_phd_9-28-19.pdf)

<sup>43</sup> <https://canons.sog.unc.edu/2010/11/a-primer-on-inclusionary-zoning/>

<sup>44</sup> <https://www.townofdavidson.org/262/Affordable-Housing-Program-Information>



Town of Zebulon Chamber of Commerce Map



Zebulon Downtown District

### Vignette - Andrews' Barber Shop

Andrew Armstrong, owner of Andrews' Barber Shop in Zebulon, hired new staff and changed his operating hours to handle the increased demand for his small business. However, his future in Zebulon is uncertain due to the recent sale of the building he rents from. Consequently, he is currently operating on a month-to-month lease and is weighing his options of moving to nearby Wendell or Knightdale.<sup>45</sup>

### Best Practice 1 – Store Size Caps

Store size caps limit the square footage and building height restrictions. They do not explicitly prohibit corporations from moving in, but size caps are effective at preventing large box stores from moving into areas where small businesses operate. Additionally, they can preserve the culture of a neighborhood by preventing an abnormal increase in scale compared to other businesses in the

<sup>45</sup> <https://abc11.com/zebulon-growth-population-business-in-boomtown/13465266/>

area. Conversely, large corporations can still adjust the size of their stores to compete with local small businesses. For example, large fast-casual chain restaurants, barber shops, and even box stores can adjust the sizes of their stores to meet zoning requirements.<sup>46</sup>

### *Best Practice 2 – Entrepreneurship and Small Business Development*

The Entrepreneurship and Small Business Center is a free service made available through Wake Technical Community College and Wake County that is funded through local taxes. The LaunchWakeCounty wing of the Center provides entrepreneurs with networking, training, and assistance with acquiring capital in under resourced communities in Wake County.

Knightdale, Wendell, Morrisville, Apex, Cary, Fuquay-Varina, Garner, Holly Springs, Raleigh, and Rolesville have their own Launch program, but Zebulon does not have that as a resource for its residents.<sup>47</sup> Lastly this supports Zebulon’s efforts, as outlined in the Comprehensive Land Use Plan, “Coordinating with educational institutions such as Wake County Technical College, the Wake County Public School System and local private schools to develop entrepreneurial curricula and exposure to real world business situations and opportunities.”<sup>48</sup>

### *Additional Note: Potential Implications of the Relocation of the Carolina Mudcats*

The Carolina Mudcats, Zebulon’s hometown team since 1991, contribute to the cultural heritage and small-town feel.<sup>49</sup> However, the City of Wilson, North Carolina recently issued a Memorandum of Understanding with the Carolina Mudcats to explore a redevelopment project.<sup>50</sup> The displacement of the Mudcats is estimated to have a \$5M annual impact. The Town of Zebulon own a 15% stake in the Five County Stadium, which requires significant updates to comply with Major League Baseball standards by 2025.<sup>51</sup>

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<sup>46</sup> <https://antidisplacement.org/tool/store-size-caps/>

<sup>47</sup> <https://www.waketech.edu/programs-courses/non-credit/build-business/small-business-center>

<sup>48</sup>

[https://www.townofzebulon.org/sites/default/files/uploads/planning/Documents/zebulon\\_comprehensive\\_land\\_use\\_plan.pdf](https://www.townofzebulon.org/sites/default/files/uploads/planning/Documents/zebulon_comprehensive_land_use_plan.pdf)

<sup>49</sup> <https://www.milb.com/carolina-mudcats/team/about>

<sup>50</sup> <https://www.wilsonnc.org/Home/Components/News/News/578/16>

<sup>51</sup> <https://wake.legistar.com/LegislationDetail.aspx?ID=5747513&GUID=AAF9AA6C-28A5-44CC-9B69-C5536DC515DE>

# PART 4: GROWTH AND DEVELOPMENT DATA FOR THE EASTERN TRIANGLE

When looking at implementation of strategies for Zebulon that may encompass new developments, recruitment of new businesses, workforce development strategies and more, understanding existing strengths and clusters from neighboring markets is essential.

Comparing Zebulon to Wake County and the Western Research Triangle does not always offer complimentary statistics and initiatives that are aligned with portions of Eastern Wake County and the Eastern Research Triangle region that have historically experienced slower growth rates than their counterparts to the west. Understanding the economic ecosystems in the Eastern portion of the Triangle will be very useful and complimentary to how Zebulon markets its strengths and identifies specific strategies for smart growth and economic prosperity.

Because of this, the following information dives further into Zebulon's neighbors to the East (Franklin County, Nash County, Wilson County and portions of Edgecombe County represented through the town of Rocky Mount and with additional, relevant information presented via Johnston County and in particular, the City of Clayton due to its relative distance to Zebulon). All locations presented in this data were included based on the following: a relative commuting distance for Zebulon residents and anecdotal information presented via a Zebulon Today report about residents from Zebulon commuting between these locations for employment opportunities.

Distance from the center of Zebulon to the center of each location:

- Franklin County = 20 miles (30 min. drive)
- Wilson County = 24 miles (30 min drive)
- Johnston County (Clayton) = 20 miles (28 min. drive)
- Nash County = 23.5 miles (22 min. drive)
- Edgecombe County (Rocky Mount) = 37 miles (37 min. drive)
- Wake County (Raleigh) = 24 miles (25 min. drive)

## ECONOMIC ECOSYSTEMS PER COUNTY/DESIGNATED LOCATION

The Eastern Research Triangle region showcases a transition from traditional industries to a more diversified and modern economic landscape. Manufacturing, including advanced manufacturing and biopharmaceuticals, plays a significant role in these counties' economies. Accessible transportation networks, workforce development initiatives, and the presence of major employers are common factors contributing to economic growth. Additionally, collaboration and partnerships between local governments, workforce development boards, the community college systems and employers have been instrumental in driving innovation and economic prosperity in these regions.

The following section highlights each respective location's economic ecosystem and strengths.

## Franklin County<sup>52</sup>

Franklin County boasts a diverse industrial landscape with a strong presence of manufacturing, plastics, polymers, and specialty packaging. Major employers such as Novozymes North America, K-Flex USA, and East West Manufacturing lead the way in the life sciences, manufacturing, and contract manufacturing sectors, respectively. These companies collectively employ hundreds of skilled workers and contribute significantly to the county's economic vibrancy. The region's focus on workforce development and strategic transportation networks further enhances its appeal to industries seeking growth opportunities.

## Nash County<sup>53</sup>

Nash County stands out as a prime location for advanced manufacturing, food processing and pharmaceutical companies. Pfizer Inc. and Cummins Engines, two of the largest producers of medical devices and diesel engines in the nation, are notable major employers in the county. Their substantial workforces reflect the region's commitment to fostering a talent pool aligned with industry needs. Nash County is also home to many food processing companies, including Atlantic Natural Foods, the Cheesecake Factory Bakery, Braswell Foods and more. Nash County also leverages partnerships with educational institutions like [Nash Community College](#) and [RAMP East](#) to produce workers with advanced manufacturing and food processing skills to ensure a healthy talent pipeline for their cluster of industries.

## Wilson County<sup>54</sup>

Wilson County's economic landscape is characterized by a diverse range of industries, including manufacturing, agriculture, healthcare, and financial services. Major employers like Novartis, Truist Bank and Bridgestone Americas contribute significantly to the county's economic vitality. Novartis is a major player in the pharmaceutical industry and employs hundreds of workers in the production of generic prescription drugs. Truist Bank employs over 2,000 employees at its Main Branch location and Bridgestone Americas employs 1,700 at their manufacturing facility. The county's skilled manufacturing workforce, along with its agricultural strengths, allows for a healthy variety of industries ranging from pharmaceuticals to tire manufacturing.

## Edgecombe County (City of Rocky Mount)<sup>55</sup>

The City of Rocky Mount, which shares borders with Nash and Edgecombe Counties, has embraced a transition from traditional industries to knowledge-based enterprises. Major employers such as Draka Elevator Products and Babington Technology Inc. represent the city's focus on clean technology and advanced manufacturing. The presence of healthcare facilities like Nash General Hospital adds to the county's diverse economic portfolio. Agriculture continues to be an important contributor, with tobacco production and other crops playing a vital role in the local economy.

## Johnston County (Town of Clayton)<sup>56</sup>

The Town of Clayton, situated within Johnston County, North Carolina, is a thriving community with a diverse economic landscape. The town's economic backbone is built on various sectors, with a

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<sup>52</sup> [https://www.franklincountync.gov/county\\_services/economic\\_development/companies.php](https://www.franklincountync.gov/county_services/economic_development/companies.php)

<sup>53</sup> Research Triangle Regional Partnership via Access NC, June 2022

<sup>54</sup> <https://www.wilsonedc.com/industry-facts>

<sup>55</sup> Carolinas Gateway Partnership

<sup>56</sup> <https://www.growwithjoco.com/business-and-industry/major-employers/>



primary focus on manufacturing, retail trade, education, and health services. Clayton is not only an economic hub but also home to a range of admired corporations that actively engage with the local community, supporting schools, charities, and non-profits. The town is particularly noted for its strong connection to the life sciences and manufacturing industries. As part of the [BioPharma Crescent of Eastern North Carolina](#), Clayton hosts several world-class industry partners, including Novo Nordisk, the largest manufacturing investment in North Carolina, specializing in biopharmaceutical manufacturing. Additionally, Grifols, Caterpillar, Natvar, 3C! Packaging, and The Hales Group, among others, contribute to the region's manufacturing sector. Beyond this, Clayton has a presence in agricultural technology, with Bayer as a prominent player.

### Wake County<sup>57,58</sup>

Wake County has a diverse and thriving economy encompassing employers of all industries and sizes. Major industries include professional and business services; trade, transportation, and utilities; and education and health services. Duke University and Duke Health Systems is the largest employer in the county, followed by the State of North Carolina. Wake County has several colleges and universities including NC State University and Wake Tech Community College. Wake County is also home to the state capital, Raleigh. Zebulon is the easternmost town in Wake County.

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<sup>57</sup>

[https://nmcndn.io/e186d21f8c7946a19faed23c3da2f0da/ca771636b8514cc3b5eb2e42fc43d69e/files/WCED\\_Brochure\\_Econ-amp-Biz\\_2023\\_final.pdf](https://nmcndn.io/e186d21f8c7946a19faed23c3da2f0da/ca771636b8514cc3b5eb2e42fc43d69e/files/WCED_Brochure_Econ-amp-Biz_2023_final.pdf)

<sup>58</sup> <https://raleigh-wake.org/business-advantages/data-demographics/major-employers>

## Comparing Demographics

The following section utilizes data from the Census Bureau to compare Zebulon to all Eastern Triangle Region counties and respective cities of interest, as well as the inclusion of Raleigh and Wake County to maintain consistency with comparisons made frequently through various Zebulon studies and analyses previously conducted.

Chart 6; Source: Census Bureau

Population Estimates July 1, 2022	
Wake Co.	1,175,021
Raleigh	476,587
Johnston Co.	234,778
Nash Co.	95,789
Wilson Co.	78,449
Franklin Co.	74,539
Rocky Mount	54,013
Edgecomb Co.	48,301
Wilson (City)	47,606
Clayton	29,445
Zebulon	8,665

Chart 7; Source: Census Bureau

Average of Population (% Change) April 1, 2020 - July 1, 2022	
Zebulon	25%
Clayton	12%
Franklin Co.	9%
Johnston Co.	9%
Wake Co.	4%
Raleigh	2%
Nash Co.	1%
Wilson Co.	0%
Wilson (City)	-1%
Rocky Mount	-1%
Edgecomb Co.	-1%

### Population

Although having the smallest population among all areas compared, Zebulon has experienced the highest and most accelerated population growth, with a 25% increase from April 1, 2020 – July 1, 2022. This is more than double that of its neighboring city to the south, Clayton, which has also been experiencing above average population growth in recent years<sup>59</sup>. Several other areas, including the cities of Wilson and Rocky Mount as well as Edgecombe County, saw a decrease in population with percentage changes ranging from -1% to 0%.

<sup>59</sup> <https://www.townofclaytonnc.org/719/Clayton-NC---The-Fastest-Growing-Town-in>

## Diversity of Population

White alone, not Hispanic or Latino	
Johnston Co.	63.70%
Franklin Co.	61.70%
Clayton	59.30%
Wake Co.	58.30%
Raleigh	52.40%
Zebulon	48.00%
Nash Co.	47.40%
Wilson Co.	45.60%
Wilson (City)	36.90%
Edgecomb Co.	35.40%
Rocky Mount	29.00%

Black or African American alone	
Rocky Mount	63.40%
Edgecomb Co.	57.30%
Wilson (City)	48.40%
Nash Co.	42.00%
Wilson Co.	40.40%
Zebulon	35.90%
Raleigh	28.60%
Franklin Co.	25.90%
Clayton	22.90%
Wake Co.	20.80%
Johnston Co.	18.90%

Hispanic or Latino	
Johnston Co.	15.20%
Zebulon	14.10%
Clayton	13.20%
Wilson Co.	11.90%
Wilson (City)	11.40%
Raleigh	11.30%
Wake Co.	10.60%
Franklin Co.	10.30%
Nash Co.	7.90%
Edgecomb Co.	5.90%
Rocky Mount	3.70%

Two or More Races	
Zebulon	11.00%
Raleigh	5.40%
Clayton	4.60%
Wilson (City)	2.90%
Wake Co.	2.80%
Johnston Co.	2.50%
Franklin Co.	2.30%
Rocky Mount	2.20%
Wilson Co.	2.10%
Nash Co.	1.90%
Edgecomb Co.	1.60%

Chart 8; Source: Census Bureau

### Summary of Diversity of Population

Zebulon has a significantly higher multi-racial population than the rest of its counterparts in Eastern Research Triangle, Wake County & Raleigh, NC with 11% reporting two or more races per household. Zebulon also has a significant Hispanic or Latino population, falling second behind Johnston County with 14% of its population represented in this category. In addition, Zebulon's Black or African American population represents almost 34% of the community, while White persons alone only represent 48% of the community.

The majority of the Eastern Triangle Region, apart from Clayton, Johnston County, and Franklin County, has nearly equal or higher percentages of residents identifying as Black or African American compared to those identifying as White alone. This demographic makeup is more in line with what is observed in the Town of Zebulon. This observation underscores the importance of comprehensively understanding and reviewing the demographics and economic ecosystems of the Eastern Triangle Region as Zebulon proceeds with the development of appropriate strategies and inclusive programs for the future.

**Note:** Graphs were not included for American Indian and Alaska Native, Asian, and Native Hawaiian and Other Pacific Islander populations which accounted for less than 1.5% of population percentages for all locations referenced, apart from Asian populations in Raleigh & Wake County at 5% and 9%, respectively.

<b>Foreign born persons, 2017-2021</b>	
<b>Zebulon</b>	<b>16.80%</b>
<b>Wake Co.</b>	<b>13.50%</b>
<b>Raleigh</b>	<b>13.00%</b>
<b>Clayton</b>	<b>9.10%</b>
<b>Johnston Co.</b>	<b>7.50%</b>
<b>Wilson (City)</b>	<b>6.70%</b>
<b>Wilson Co.</b>	<b>6.10%</b>
<b>Franklin Co.</b>	<b>5.30%</b>
<b>Nash Co.</b>	<b>4.30%</b>
<b>Rocky Mount</b>	<b>3.00%</b>
<b>Edgecomb Co.</b>	<b>2.80%</b>

Chart 9; Source: Census Bureau

### Population Characteristics

#### Foreign Born Population

In comparison to all areas presented, Zebulon is an outlier in the category of foreign-born persons with almost 17% of its population having been born in another country. This is not as much of a trend in the Eastern Triangle Region and could be explored further to understand the makeup and needs of this particular community in Zebulon to ensure there are language and cultural programs available within schools and throughout the community.

<b>Female</b>	
<b>Zebulon</b>	<b>59.90%</b>
<b>Wilson (City)</b>	<b>54.30%</b>
<b>Edgecomb Co.</b>	<b>53.30%</b>
<b>Rocky Mount</b>	<b>52.80%</b>
<b>Wilson Co.</b>	<b>52.30%</b>
<b>Nash Co.</b>	<b>51.70%</b>
<b>Raleigh</b>	<b>51.40%</b>
<b>Clayton</b>	<b>51.20%</b>
<b>Wake Co.</b>	<b>50.90%</b>
<b>Johnston Co.</b>	<b>50.60%</b>
<b>Franklin Co.</b>	<b>50.10%</b>

Chart 10; Source: Census Bureau

#### Female Population

Zebulon has the highest Female population of any of its neighbors, including Raleigh, Wake County, and the Eastern Triangle Region. The female populations also represent more than half of Zebulon's population at 60%. This will be important to consider when contemplating strategies for workforce development and understanding barriers to entry for women in the workforce.

### Veteran Population

While Zebulon's veteran population is comparatively smaller compared to other areas, it's important to highlight the significant presence of veterans across the Eastern Triangle Region. This serves as a valuable asset for business recruitment and marketing efforts. North Carolina's veteran community provides access to a skilled and motivated workforce actively seeking new career opportunities<sup>60</sup>.

Veterans, 2017 - 2021	
Rocky Mount	8%
Nash Co.	7%
Johnston Co.	6%
Edgecomb Co.	6%
Clayton	6%
Franklin Co.	6%
Wilson Co.	6%
Wilson (City)	5%
Zebulon	5%
Wake Co.	4%
Raleigh	4%

Chart 11; Source: Census Bureau

## HOUSING<sup>61</sup>

Zebulon is ideally located between several large clusters of employers (particularly Raleigh and Rocky Mount). This can be perceived as an advantage for dual income households, where both adults can be employed different locations with a reasonable commute. The following data provide an overview of housing trends over the past three years in the five neighboring counties, along with Wake County. The data points are on a rolling-three month basis as of October 2023.

### Median Sales Prices

Between 2021 and 2023, all counties in the dataset saw growth in their median home sales price. Edgecombe County has the highest percent change in median home sales prices at 29%. However, it also consistently has the lowest average median prices for the period. Franklin and Johnston Counties have the highest average median prices besides Wake County.

	2021	2022	2023	2021-2023 % Change
Edgecombe	\$143,000	\$140,000	\$184,500	29.0%
Franklin	\$320,000	\$381,440	\$361,950	13.1%
Johnston	\$325,000	\$368,710	\$360,000	10.8%
Nash	\$247,500	\$254,900	\$299,550	21.0%
Wake	\$410,000	\$472,778	\$475,000	15.9%
Wilson	\$224,000	\$249,900	\$249,000	19.6%

Chart 12; Source: Susan Sanford, Berkshire Hathaway Home Services of North Carolina

<sup>60</sup> <https://ourncmilitary.nc.gov/veteran-workforce/north-carolina-military-employment-nc4me>

<sup>61</sup> Data provided by Susan Sanford, Director of Relocation and Business Development, Berkshire Hathaway Home Services of North Carolina

# Homes for Sale

All counties had at least 47% more homes for sale in 2023 compared to 2021. Wilson County saw the greatest increase, at nearly 700%. Several counties – Edgecombe, Johnston, and Wake Counties – saw a decrease in the number of homes for sale from 2022 to 2023; this may be because of higher interest rates.

	Rolling 3 Months October 2021	Rolling 3 Months October 2022	Rolling 3 Months October 2023	2021-2023 % Change
Edgecombe	17	43	25	47.1%
Franklin	152	266	304	100.0%
Johnston	408	1,033	790	93.6%
Nash	82	127	162	97.6%
Wake	1,330	3,025	2,257	69.7%
Wilson	3	13	23	666.7%

Chart 13; Source: Susan Sanford, Berkshire Hathaway Home Services of North Carolina

# New Construction Home for Sale

All counties but Edgecombe County saw their new construction homes for sale at least double from 2021-2023. It should be noted that the sample size for Edgecombe County and the 2023 data may be an anomaly. Wilson County saw the greatest percentage increase in new construction homes for sale, but had the lowest total number of new construction homes for sale. Johnston County followed Wake County as having the highest number of new construction homes for sale during the current year.

	2021	2022	2023	2021-2023 % Change
Edgecombe	4	14	2	-50.0%
Franklin	58	229	185	219.0%
Johnston	193	587	485	151.3%
Nash	31	48	101	225.8%
Wake	441	1,276	945	114.3%
Wilson	3	13	23	666.7%

Chart 14; Source: Susan Sanford, Berkshire Hathaway Home Services of North Carolina

# REVIEW OF RECENT ANNOUNCEMENTS AND EXPANSIONS

The following section reviews data from the Economic Development Partnership of North Carolina’s Community Investment Report database. The summary of data<sup>62\*</sup> below includes 48 separate announcements made from January 01, 2018 – August 31, 2023 by new and existing companies for Franklin, Wilson, Nash and Edgecombe Counties.

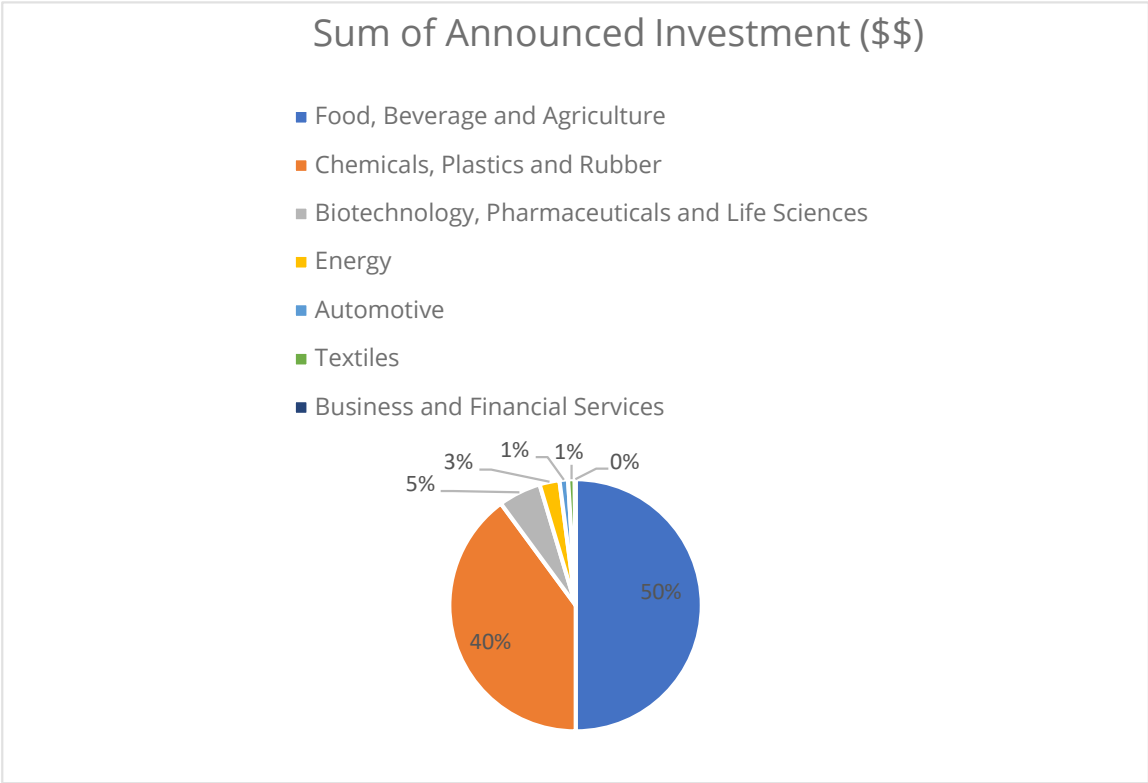


Chart 15; Source: EDPNC

## New vs. Expanding Companies

Facility Type	Announced Jobs	Announced Investment (\$\$)
Expanded	513	121,333,617
New	1,654	300,337,383

Chart 16; Source: EDPNC

<sup>62</sup> **Note about data:** The initial data analysis included Johnston County; however, during the review it was determined that Johnston County would be removed from the summary of data due to historically large expansions that were skewing the investment and industry breakdowns. Johnston County’s announced investments from 2018 – 2023 totaled capital investments of \$1.5 Billion, of which \$1.2 Billion were represented by existing industry expansions within the Town of Clayton, represented by Novo Nordisk (\$750m capital investment) and Grifols (\$350m capital investment).

Out of the 48 announcements recorded in the data, existing company expansions versus new company locations were almost an even split, with 25 announcements represented by existing company expansions and 23 represented by new company locations. Notably, new company locations accounted for the majority of new jobs and capital investments during this time period. Although new company locations represent the highest in jobs created and capital investments, it is worth noting that existing companies still represent a significant number of jobs created and new capital gains for the Eastern Triangle Region. This further underscores the importance of balancing both recruitment of new industry and the development of a customized existing industry program that encourages growth.

## INDUSTRIES

### Industry Clusters

Three industries clusters have noticeably higher investments associated with their projects and are outlined below:

**Food, Beverage and Agriculture:** Represented 50% of the share of industry clusters by total announced investments and has seen steady growth from 2020 – 2022. All announcements made in this industry cluster are represented by New Company Locations which is likely a direct result of investments made by the State of North Carolina and the Economic Development Partnership of North Carolina in the food and beverage industry via a dedicated business recruitment position hired in 2017 and workforce development and industry partnership efforts<sup>63</sup>.

Companies & their Associated NAICS Descriptions:

- **Believer Meats:** Research and Development in Biotechnology (except Nanobiotechnology)
- **Ripe Revival:** Food Product Machinery Manufacturing
- **SinnovaTek:** Industrial Machinery and Equipment Merchant
- **The Crump Group Inc.:** Dog and Cat Food Manufacturing

**Chemicals, Plastics and Rubber:** Represented 40% of the share of industry clusters by total announced investments and was the 2<sup>nd</sup> largest industry cluster among the data. In addition, this particular industry has seen consistent announcements from 2020 – 2022 and is represented by 4 new company locations in North Carolina and 2 existing company expansions.

Companies & their Associated NAICS Descriptions (not an all inclusive list):

- **Activated Carbon Innovation:** All Other Miscellaneous Chemical Product and Preparation Manufacturing
- **COSMOIND:** Plastics Pipe and Pipe Fitting Manufacturing
- **Placon:** Plastics Packaging Film and Sheet (including Laminated) Manufacturing
- **Plaziv America:** Urethane and Other Foam Product (except Polystyrene) Manufacturing

**Biopharmaceuticals, Pharmaceuticals & Life Sciences:** Represented only 6% of total announced investments but a clear and consistent industry cluster among the Eastern Triangle Region counties, especially if we consider previously removed data from major announcements in Johnston County which pushed this cluster to the top by a delta of almost \$1B in capital investment.

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<sup>63</sup> <https://edpnc.com/wp-content/uploads/2019/04/2018-EDPNC-Annual-Report.pdf>



Companies & NAICS Descriptions:

- **Abec:** Biological Product (except Diagnostic) Manufacturing
- **Asterra Labs:** Pharmaceutical Preparation Manufacturing
- **Novozymes North America:** Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)

## TYPES OF OPERATIONS

As we can see from the chart below, Manufacturing is overwhelmingly the largest project type in the Eastern Research Triangle region and as mentioned previously, is represented by these three top industry clusters: **Food, Beverage and Agriculture, Chemicals, Plastics and Rubber and Biopharmaceuticals, Pharmaceuticals & Life Sciences.**

Economic Development Project Type	Sum of Announced Investment (\$)	Sum of Announced Jobs
Manufacturing	366,992,203	1,390
Distribution Warehouse	13,754,176	312
Office	9,281,003	91
Headquarters-Corporate	2,241,000	106
Headquarters-Business	1,800,000	25
Call Center	1,000,000	200

Chart 17; Source: EDPNC

The data also show that the largest amount of jobs in the Manufacturing project type were announced in both Nash (604) and Wilson (445), followed by Edgecombe (229) and Franklin (119) Counties.

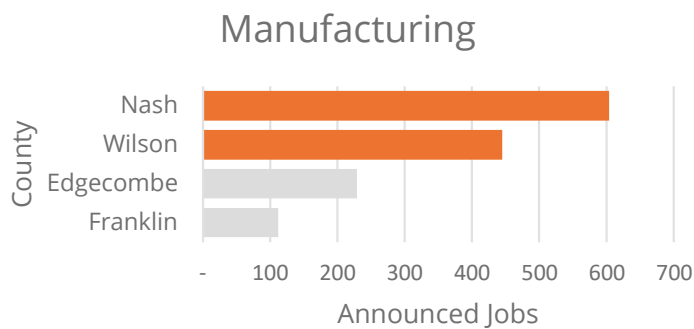


Chart 18; Source: EDPNC

Within the Distribution Warehouse category, Wilson has noticeably higher announced jobs (200) than its counterparts Nash, Franklin and Edgecombe, with 78, 34 and 0 jobs, respectively.

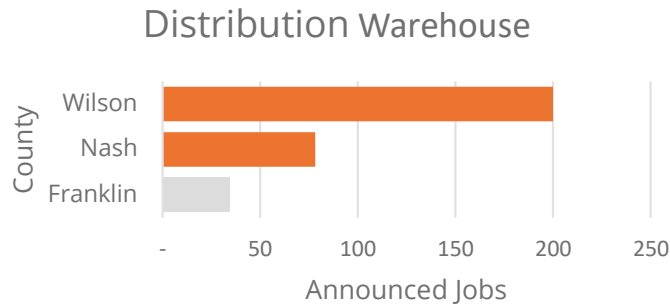


Chart 19; Source: EDPNC

## CONCLUSION

This section of the Environmental Assessment provides a comprehensive analysis of the Eastern Triangle Region's economic ecosystems and demographics to help Zebulon better understand the strengths and opportunities within its neighboring markets. The Eastern Triangle Region exhibits a shift from traditional industries to a more diversified and modern economic landscape.

Manufacturing, including advanced manufacturing and biopharmaceuticals, plays a significant role in these counties' economies. Collaborations between local governments, workforce development boards, and employers have been instrumental in driving innovation and economic prosperity.

In addition, below are some areas that Zebulon can consider as they continue the process of constructing a comprehensive Economic Development strategy:

**Economic Diversification:** Counties in the Eastern Triangle Region are actively diversifying their economies away from traditional sectors like tobacco, textiles, and agriculture toward more modern industries, such as advanced manufacturing, biopharmaceuticals, and technology. In addition, each county offers diversity of industries, ranging from manufacturing to healthcare, agribusiness, and finance.

**Strong, Growing Industry Clusters:** The Eastern Triangle Region has three notable industry clusters with high amounts of new, capital investment and jobs in recent years: food, beverage, and agriculture; chemicals, plastics, and rubber; and biopharmaceuticals, pharmaceuticals, and life sciences. These clusters have seen steady growth and represent potential areas of future exploration for Zebulon.

**Manufacturing:** Manufacturing overwhelmingly dominates economic development projects in the region, aligned with the top industry clusters. Wilson County can also be noted for its distribution warehouse projects.

**Access to Transportation Networks:** Many of these counties emphasize their access to reliable transportation networks, including highways and railways. This accessibility is crucial for the distribution of goods and services, making them attractive for manufacturing and distribution industries.

**Education, Workforce Development & Collaboration:** Consistent with the entire Research Triangle region, the Eastern Triangle Region has prioritized partnerships between local

governments, workforce boards, educational institutions, and employers, ensuring a skilled workforce tailored to the needs of their local industries and providing opportunities for career advancement with their existing populations. These types of collaborations ensure a thriving business ecosystem and help drive innovation.

**Demographics:** Zebulon has experienced significant and accelerated population growth in recent years and is an outlier in comparison to its neighbors. In addition, Zebulon has a diverse population with a significant presence of Hispanic/Latino and multi-racial communities as well as Black or African American and foreign-born residents, re-emphasizing the need for understanding potential barriers and creating equitable and inclusive strategies that support minority populations. These demographics trend more in line with portions of the Eastern Triangle Region, than with Wake County & Raleigh.

In conclusion, this section of the Environmental Assessment highlights the dynamic economic landscape of the Eastern Triangle Region and underscores the importance of economic diversification, industry clusters, workforce development, and demographic considerations as Zebulon charts its path forward. Embracing these insights will enable Zebulon to develop a robust and inclusive Economic Development strategy that capitalizes on its unique strengths and fosters sustainable growth in alignment with its regional counterparts.

# COMMERCIAL AND INDUSTRIAL ASSESSMENT

## INTRODUCTION

The following commercial and industrial assessment is a component of the Town of Zebulon's year-long process to develop a comprehensive Economic Development Strategy, creating an intentional and actionable plan that allows for a healthy economic ecosystem and smart growth for the Town.

One critical component of a healthy economic ecosystem is a diverse and well-rounded tax base – one that is spread between residential, commercial, and industrial activity and investments. Creating a strong and diverse tax base allows a town to manage growth and fund critical projects that can improve the overall quality of life for residents. The Town of Zebulon has already identified and prioritized these components within their Comprehensive Land Use Plan (CLUP), conducted in 2020 and approved in 2021. The CLUP identified several guiding principles, two of which have been identified as especially relevant to this assessment and will remain a strong focus throughout the entirety of Zebulon's Economic Development Strategy. The guiding principles are as follows:

- **Guiding Principle 3#: Zebulon will be **balanced**.**  
Zebulon will seek to be a complete and balanced community as it grows. **From an economic and tax base standpoint, this relates to having both great neighborhoods and living options while also being an attractive host community for major employers and a wide array of small businesses.** Zebulon also must balance the needs of older, established neighborhoods and commercial areas with the necessary management and servicing of growth at its edges.
- **Guiding Principle #4: Zebulon will be **resilient**.**  
**The foundation for a resilient community is a diverse local economy that will continue to attract investment and generate jobs over the long term while bolstering the Town's tax base.** Zebulon's economic base must also be able to withstand times of recession and avoid over-reliance on one or a few major employers.

To achieve a strategy and vision that incorporates a balanced and resilient community, there is a need to assess and explore the commercial and industrial makeup of Zebulon and identify trends across the region suitable to incorporate into a future strategy. This assessment will analyze Zebulon's current industrial assets, review land use allocations, and better identify opportunities that can create long-term and sustainable opportunities for job creation and capital investment – an area that is critical to the overall health of the economic ecosystem of Zebulon. In addition, the assessment will incorporate insights into mixed use commercial investments and redevelopments

which can maximize space and allow for residential, commercial, and industrial uses all in one. Data on real estate trends across Wake County, as well as targeted industry clusters, will also be incorporated into the overall assessment.

The assessment is divided into the following sections:

- [Town of Zebulon’s Commercial and Industrial Landscape](#)
- [Wake County Commercial and Industrial Real Estate Trends](#)
- [Examples of Successful Redevelopments in Wake County](#)

# TOWN OF ZEBULON’S COMMERCIAL AND INDUSTRIAL LANDSCAPE

## CURRENT ACTIVITY

According to the Zebulon Comprehensive Land Use Plan, the Town was historically known for a heavy concentration of commercial and industrial business activity which has since shifted towards a now majority residential base. This shift towards residential started to ramp up in 2019 and has continued to grow with new housing developments, including subdivisions and multi-family construction. In the 2022 Annual Financial Report, the Mayor confirms this shift, stating: “The composition of the tax base is shifting from a heavily commercial and industrial base to a more residential base with the residential development recently completed and will continue to do so with over 2,000 planned and approved residential development on the way.”

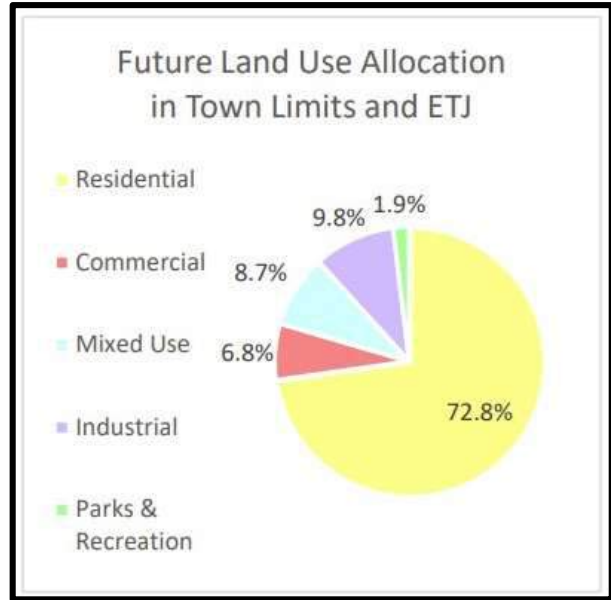
We can get a better understanding of this shift and the makeup of Zebulon more holistically by reviewing the following information provided within the CLUP and specifically the [Future Land Use and Character Map \(FLUC Map\)](#)<sup>64</sup> which was approved in 2021. The FLUC Map designates land use categories throughout the Town of Zebulon and its extraterritorial jurisdiction (ETJ). The CLUP also offers several charts to coincide with the Map (listed below and on page 3), which offer snapshots of the acreage and future land use allocation per category.

## FUTURE LAND USE ALLOCATION

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<sup>64</sup> [https://www.townofzebulon.org/sites/default/files/uploads/planning/Maps/02-zebulon\\_tomorrow\\_-\\_map-future\\_land\\_use\\_and\\_character\\_adopted\\_06.07.21.pdf](https://www.townofzebulon.org/sites/default/files/uploads/planning/Maps/02-zebulon_tomorrow_-_map-future_land_use_and_character_adopted_06.07.21.pdf)

This pie graph shows the large quantity of residential land use allocations (73% of total) versus areas like commercial (6.8%), mixed use (8.7%) and industrial (9.8%) that could accommodate future long-term established employers, quality job creation, and avenues for increased economic activity.



*1Source: Zebulon Comprehensive Land Use Plan*

Naturally, a growing residential population and developments begins to attract commercial assets and service providers that can meet the day-to-day needs of residents and enhance their quality of life. It is clear when driving through the Town and looking at real-time development activity that Zebulon is seeing the effects.

According to Zebulon’s Interactive Development Map which displays projects going through the Town’s development process, in the span of one month (January – February 2024), the Town saw 16

new commercial projects. Examples of some commercial developments on that list are Presto Photo, 7 Eleven Gas Station, Rocket Express Car Wash, Storage Max, and Tractor Supply. In addition, Downtown continues to see growth with new business locations, including the Creative Cup coffee shop, a bagpipe manufacturing company, and existing business expansions and/or revitalization projects, including Norse Brewing which is listed as an active project on the Interactive Development Map as well.

In addition to this commercial activity, which has added benefits to a resident’s quality of life, we will pay particular attention in this report to existing employers and the attraction of future employers to Zebulon who can offer Zebulon residents quality, long-term job opportunities while adding growth and diversity to the Town’s tax base, further enabling the Town to make investments in parks, public utilities, and all the critical elements of the Zebulon ecosystem that make it a great place to live.

**A critical component in retaining and attracting quality employers** (company headquarters, research and development facilities, manufacturing, and advanced manufacturing operations, for example) **to Zebulon is being able to offer competitive land sites and existing buildings that can accommodate these types of users.** The following sections will review the Town’s land use allocation plan to get a sense of what is available and feasible in Zebulon, as well as the types of land sites and existing buildings that are in high demand for companies looking to expand and/or re-locate in Wake County.

Compiled in the table below (and reflected in the FLUC Map) are 15 categories used to address both land use and character, along with their associated acreage.

### Future Land Use and Characteristics Categories

Map Category	Town		Extraterritorial Jurisdiction		Planning Area	
	Acres	% of Total	Acres	% of Total	Acres	% of Total
Parks and Recreation	124.7	3.9%	0.0	0.0%	28.2	0.2%
Rural Conservation	0.4	0.0%	194.5	4.1%	4,949.4	36.5%
Rural Residential	0.0	0.0%	0.0	0.0%	4,102.9	30.2%
Suburban Residential	528.1	16.4%	3,367.0	70.6%	4,375.2	32.2%
General Residential	1,278.9	39.8%	290.3	6.1%	0.9	0.0%
Urban Residential	44.3	1.4%	0.8	0.0%	0.0	0.0%
Residential Mix	88.3	2.7%	14.4	0.3%	0.0	0.0%
Suburban Commercial	107.7	3.4%	99.4	2.1%	118.0	0.9%
General Commercial	251.6	7.8%	81.8	1.7%	0.0	0.0%
Stadium Area Mixed Use	47.8	1.5%	284.6	6.0%	0.0	0.0%
Industrial Light	233.5	7.3%	96.6	2.0%	0.0	0.0%
Suburban Business Park	41.4	1.3%	0.0	0.0%	0.0	0.0%
Industrial Heavy	214.2	6.7%	197.2	4.1%	0.0	0.0%
Urban Downtown Core	7.3	0.2%	0.0	0.0%	0.0	0.0%
Urban Downtown Mixed Use	217.0	6.8%	141.3	3.0%	0.0	0.0%

NOTE: Cemeteries account for 0.9% of the area within the town limits (27.7 acres).

*Source: Town of Zebulon Comprehensive Land Use Plan*

To obtain a closer look at the categories that will most closely align with real estate trends and information presented throughout the rest of this report, we have condensed information from the chart above and offered descriptions of those categories that either currently accommodate or will accommodate uses like office users, industrial users, mixed use developments, long-term established employers, and quality job creation.

Map Category	Town		Extraterritorial Jurisdiction	
	Acres	% of Total	Acres	% of Total
Suburban Commercial	107	3.40%	99.4	2.10%
General Commercial	251.6	7.80%	81.8	1.70%
Stadium Area Mixed Use*	47.8	1.50%	284.6	6.00%
Industrial Light	233.5	7.30%	96.6	2.00%
Suburban Business Park	41.4	1.30%	0	0.00%
Industrial Heavy	214.2	6.70%	197.2	4.10%

Urban Downtown Core*	7.3	0.20%	0	0.00%
Urban Downtown Mixed Use*	217	6.80%	141.3	3.00%

The following section offers definitions on the above categories pulled from the CLUP, as well as current activities and existing companies found within certain categories:

- **The Suburban Commercial** classification involves commercial developments that focus on preserving “green” and open spaces. The suburban commercial character is achieved through preservation of trees or other natural site features, along with generous landscaping and can include commercial retail and service uses, multi-story or small-scale offices, and medical or research and development facilities, as an example.
- **General Commercial (GC)** applies to properties utilized for commercial retail, office, and service purposes, primarily situated along major roadways within the community to ensure high visibility and accessibility. However, it can also include locations catering to smaller-scale and neighborhood-oriented businesses and can include mixed use developments that might incorporate residential components as well. According to the FLUC Map, some of these GC areas fall in central, west and northwest Zebulon with larger areas along the US 264 and Highway 97 intersection, surrounded by plots of land designated for Industrial Heavy uses.
- **The Industrial Heavy (IH)** characteristic is designed to cater to activities that can have a significant impact on neighboring properties, particularly in terms of noise, vibration, light, odor, truck traffic, and operating hours. This encompasses both "light" industrial operations and more impactful "heavy" industrial activities. Depending on the specific standards set forth in development regulations, industrial areas may accommodate a diverse array of uses, spanning from office/warehouse spaces to wholesale operations, product assembly, and manufacturing facilities. According to the FLUC Map, IH sites are concentrated along the US 264 corridor and along the rail line that stretches across the Town of Zebulon from East to Southwest. This includes the Triangle East Business Park, home to existing industries like Nomaco as well as a 47,000 square foot existing building (formerly Vinventions) and several acres of land for future development within the park. The IH designation on the FLUP Map also includes Devil Dog’s operations and the Gert Noel Innovation Center across the highway from the Triangle East Business Park.
- **The Industrial Light** characteristics refers to types of operations like warehousing and distribution, light manufacturing, processing/assembly, and flex space (office, lab, and research and development uses combined) that would not have as high of a disturbance on nearby properties when it comes to noise, vibration, odor, truck traffic, etc. Currently included in this category of Industrial Light on the FLUP Map are GSK’s operation, US Foods, and the corridor along Old Highway 264 as well as southwest Zebulon.
- **Urban Downtown Core and Urban Downtown Mixed Use:** The Urban Downtown Core designation typically represents the most densely developed section of a community, characterized by extensive building coverage and minimal private development space



allocated for off-street parking and open landscapes. Mixed use developments are prevalent, contributing to a vibrant urban environment. Public plazas and pocket parks offer green spaces for community gatherings and events, sometimes involving street closures. Adjacent to the Urban Downtown Core lies the Urban Downtown Mixed Use area, which exhibits a slightly lesser intensity of mixed use development. This zone serves as a transitional buffer between the bustling downtown core and neighboring areas primarily dedicated to single-family residences or commercial activities. It often hosts complementary businesses and amenities such as professional offices, restaurants, and cultural venues, maintaining a pedestrian-friendly environment. In July 2023, the Town of Zebulon was designated as a **North Carolina Main Street Community**, a title awarded for the Town's dedication to the improvement of the economic wellbeing of the downtown district. Prior to this designation, the Town has spent 3 years participating in programs and receiving specialized support from the NC Main Street & Rural Planning Center and the Downtown Associate Community. The Town continues to conduct studies and implement programs that are specific to the revitalization and growth of the Downtown area.<sup>65</sup>

- **The Stadium Area Mixed Use** characteristic, according to the CLUP, is tailored for Five County Stadium and its vicinity, demanding special focus to protect a community asset and identify a high-value use. In addition, there are traffic and noise concerns (for example, concerts, fireworks, and peak arrival and departure traffic flows) that are specific to this area and will be considered for future developments. The stadium is predominantly surrounded by non-residential areas, with the presence of a US Foods distribution facility and a wastewater treatment facility nearby. Specific development opportunities for Five County Stadium are detailed in a 10-page section of the CLUP. The study envisions the area becoming a vibrant destination, characterized by walkability and a blend of hospitality, entertainment, and recreational amenities.

While the residential activity has proven to be a positive for the overall recent growth of the Town and has attracted commercial assets and service providers, it does place emphasis on the need to create a strategic vision and intentional plan for the smaller pockets of mixed use and industrial land use allocations across the Town, ensuring best and highest uses to achieve the goal of a balanced and resilient community. Data provided in the next two sections on real estate trends and redevelopment projects across Wake County will add some perspective into the types of real estate projects that are in high demand for companies looking to expand and/or relocate in Wake County and that would fit within the current CLUP characteristics identified above.

*\*Although there will be themes identified within this report that can be incorporated into future downtown and Five-County Stadium development considerations, the Urban Downtown Core, Urban Downtown Mixed Use and Stadium Area Mixed Use categories and characteristics have either been studied in the recent past (via the NC Main Street Program or 10-page layout in CLUP) or are in the process of undergoing in-depth analysis in the future.*

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<sup>65</sup> <https://www.commerce.nc.gov/news/press-releases/2023/07/10/three-communities-selected-nc-main-street-programs>

# WAKE COUNTY COMMERCIAL AND INDUSTRIAL REAL ESTATE TRENDS

## CAPTURING THE MOMENTUM

The State of North Carolina and the Research Triangle Region have consistently remained a top location for new and expanding businesses and continue to receive national attention as a top state and region for doing business. In 2022 and 2023, North Carolina was ranked the #1 Top State for Business by CNBC and the Raleigh Metropolitan Area was named #3 Best Business Climate in Business Facilities Annual Rankings as well as the #1 Place to Start a Small Business by LendingTree. It is also worth noting that the Research Triangle Region continues to be a resilient location, experiencing growth when other major metropolitan areas have struggled. During the height of the pandemic, Wake County, the largest county in the Research Triangle Region, had historic company announcements, including the location of a future \$1B campus and engineering hub planned by Apple, as well as Fujifilm's announcement to invest \$2B in a manufacturing facility. Both company locations bring with them thousands of new jobs and new, taxable investments to their respective communities that will make positive impacts for decades to come. In addition, developers across the region continue to put their trust in the community's continued growth and economic strength by planning new industrial campuses and redeveloping spaces for better and higher uses.

In addition to the strengths of our market that make companies more attracted to the region – talent, lower operating costs, business friendly governments, access to innovation, etc. – is the ability to offer the right type of real estate products that are being sought by companies seeking new locations or expansion opportunities. Understanding real estate trends and the industry clusters associated with the trends will be important criteria to incorporate into a long-term commercial and industrial real estate strategy for the Town of Zebulon. These criteria can enable the recruitment of new business to the Town, ultimately increasing the Town's ability to create new, quality jobs for its residents and diversifying and growing the Town's tax base through new, capital investments made by those businesses.

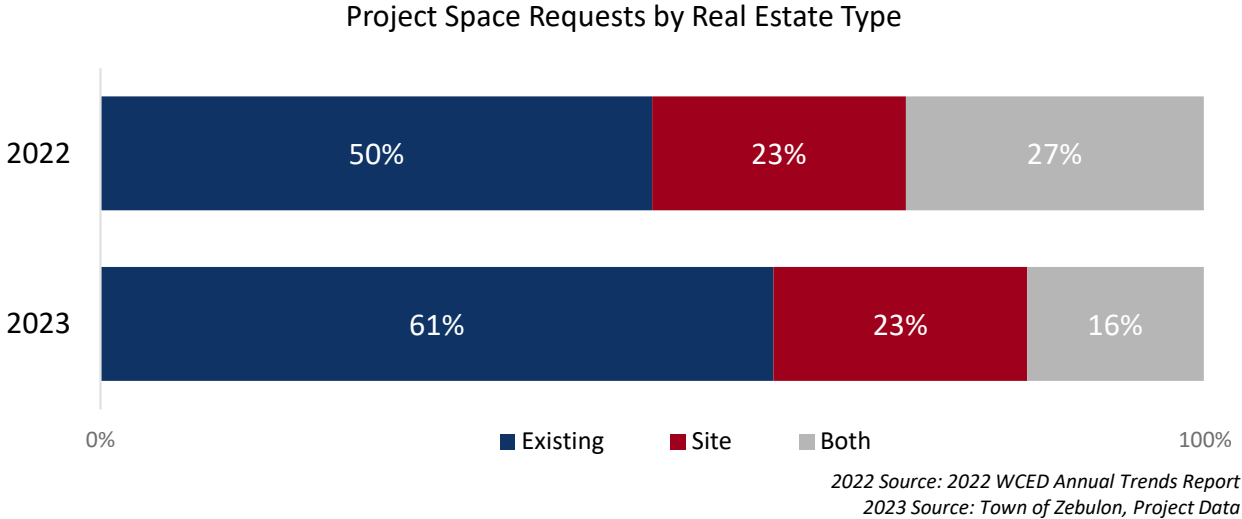
## THE DATA

To better understand current real estate trends, the following sections will review Wake County Economic Development's 2022 Annual Trends Report which incorporates data on 150 projects received from January-December 2022. In addition, data provided by the Town of Zebulon will be analyzed for project activity occurring over a 12-month period between February 2023-January 2024. Data from the Town of Zebulon will review 42 projects received that have an Existing Building request of 150,000 square feet or less and projects requesting 25 acres of land or less.

Data from the WCED Annual Trend Report and the Town of Zebulon reflect opportunities represented by businesses who are considering a new location or an expansion of an existing location in Wake County. Most, if not all, of the project activity data reviewed takes into consideration the industry in which the company operates and their real estate requirements (existing buildings vs. sites and more).

# Project Space Requests by Real Estate Type

According to the 2022 Annual Report, Existing Buildings represent 50% of all types of real estate requests, with Sites (acres of land zoned for industrial or commercial use) or Both (Existing Buildings & Sites in the same request) representing 27% and 23%, respectively.



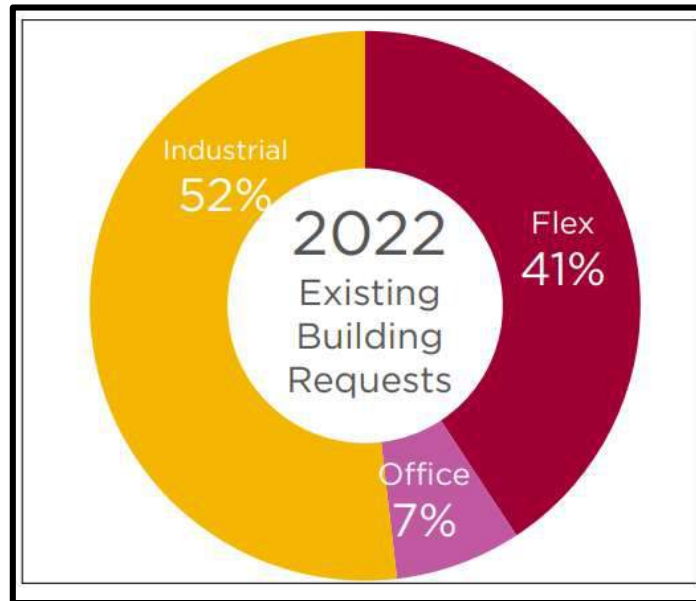
Similarly (although the pool of data is smaller), the 2023 Zebulon project data shows 61% of projects are requesting Existing Buildings, with much smaller percentages reflected for Sites (23%) and Both (16%).

Wake County Economic Development’s 2022 report also provides data on project space requests by real estate types dating back to 2017. The data shows that Existing Buildings have been the most popular real estate type for companies who are considering a relocation or expansion. Existing Buildings can offer companies a more efficient method for entering a market, often saving them time and money. Developers have learned ways to offer shell buildings (base structures [walls, ceilings, and floors]) which allow companies the flexibility to up-fit the building in a way that is specific to their processes and industry standards.

## Existing Buildings by Property Type

The Annual Report takes it a step further by narrowing in on Existing Building criteria, including the following property type categories requested: **Industrial** (typically includes uses like Manufacturing, Warehouse/Distribution, Assembly, Processing, etc.), **Flex** (typically includes warehouse or manufacturing space, office, and retail/amenities) and **Office**.

**2022 Existing Building Requests by Type**

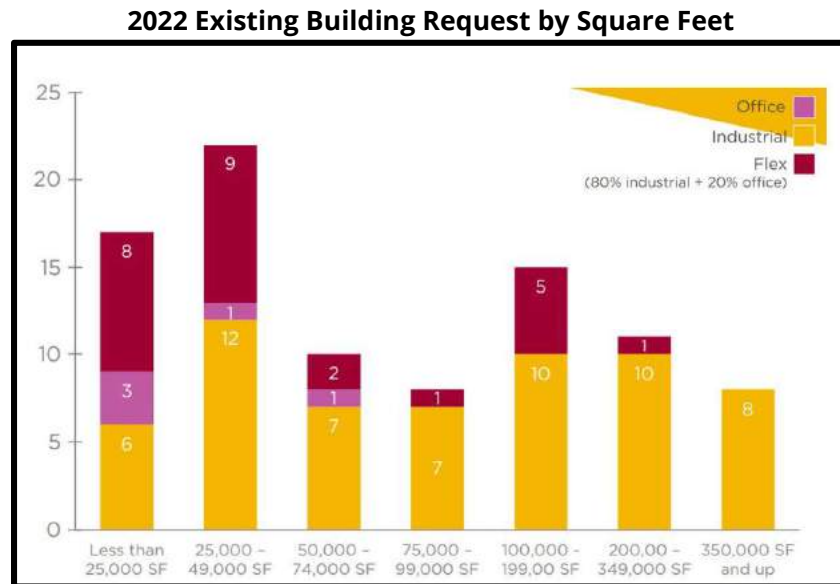


*Source: WCED 2022 Annual Trend Report*

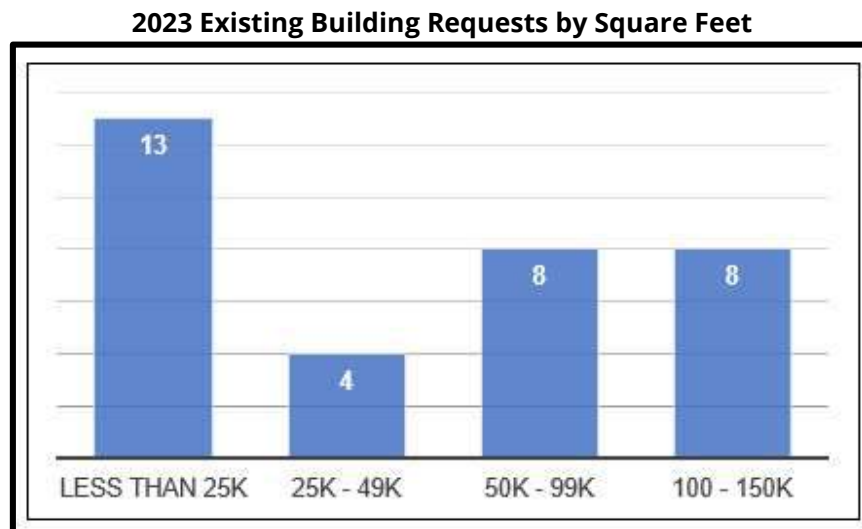
Industrial Buildings have remained the predominant property type for existing building requests since 2017. In 2022, as represented in the chart above, 52% of all Existing Building requests were for industrial buildings. Of note is a consistent share of "Flex" space being requested. Flex is a type of build-out that accommodates industrial uses such as advanced manufacturing, ag-tech, and bio-tech industries, while also incorporating office space, lab space, and increased amenities. In 2022, Flex Space accounted for 41% of all Existing Building requests.

## Existing Buildings by Size

The 2022 WCED Annual Report on project activity also showed that the top 3 most requested square footage for existing buildings fell within the following ranges (also depicted in the graph below): 25,000-49,000 square feet, Less than 25,000 square feet, and 100,000-199,000 square feet.



2023 data provided by the Town of Zebulon reflects a similar trend, with 39% of all existing building requests falling within the range of Less than 25,000 square feet and 24% represented by both 50,000-99,000 and 100,000-150,000 square foot requests.



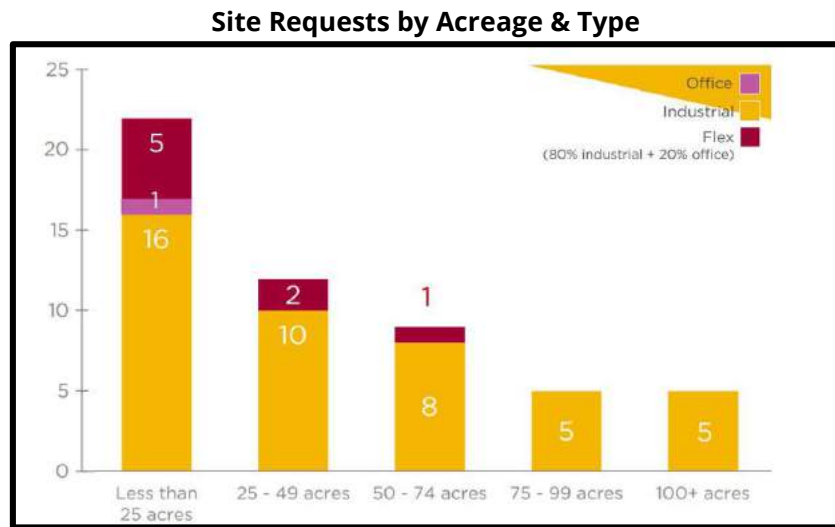
*Source: Town of Zebulon, Project Data*

As Zebulon continues to refine a strategy for attracting new businesses to the Town, the data presented above on existing buildings, as well as future reports that are published by Wake County Economic Development, will be important criteria to review and utilize when determining the development or redevelopment of buildings. This data will be important to reference and utilize in

meetings with developers and other stakeholders to identify the real estate products for the Town that will be attractive and in-demand for companies exploring the market.

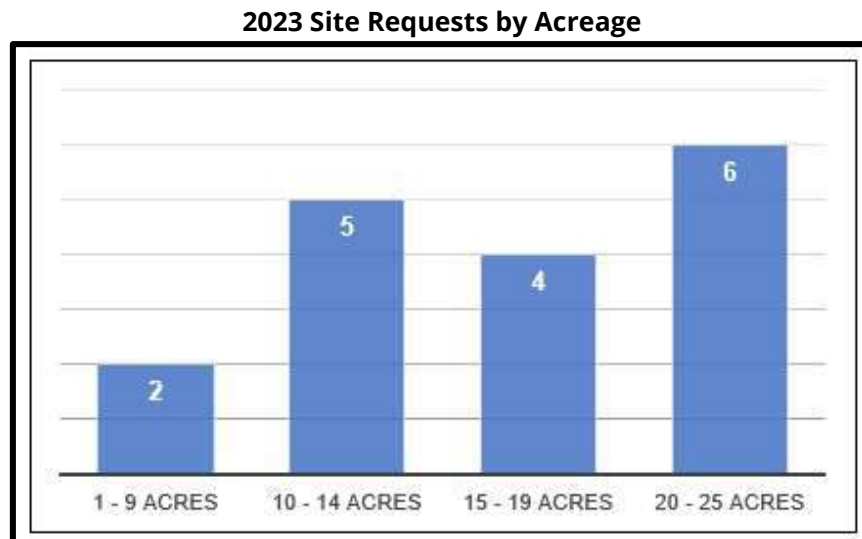
## Site Requests

When we shift from existing building requests and analyze site requests from companies who are exploring expansion opportunities, we see from the below chart that the companies represented by these projects are seeking smaller sites (less than 25 acres), accounting for 41% of all site requests in 2022. This is consistent with data from 2021, which showed 57% of all site requests fell within the “Less than 25 acres” category.



Source: 2022 WCED Annual Trend Report

When we review 2023 data from the Town of Zebulon, we see that for all sites requested that were 25 acres or less, there is not a very large differential between each division of acres, apart from requests for “1-9 Acres,” which only represented two project requests.



Source: Town of Zebulon Project Data

While in recent years we have seen a trend in larger sites being requested for emerging industries like electric vehicle manufacturing or large-scale biomanufacturing operations, most companies are still seeking smaller plots of land for high-quality expansion projects. This is good news for the Town of Zebulon, considering the current makeup of available land plots trend towards the “Less than 25 acres” category that we see in the data.

## INDUSTRY

While real estate data is important to review, it is also important for the Town to understand the industries associated with the real estate requests. The following 2022 and 2023 charts display data that will be useful in Zebulon’s continued economic development strategy.

The first chart referenced below, “**2022 Industry Types by Real Estate, Investment and Jobs**” is referenced within the WCED 2022 Annual Trends Report and breaks down real estate trends per targeted industry cluster identified by Wake County Economic Development, which include the following:

- Advanced Manufacturing
- Life Sciences, Biotech
- HQs, Shared Services, Call Centers
- Software/IT
- Smart Grid/CleanTech

According to WCED, although Wake County has a diverse economy, certain industries stand out due to factors such as a highly educated talent pool, innovation, and effective collaboration between academia, government, and industry. Specifically, the industries listed above and in the chart below are identified as Target Industry Clusters within the county. With economic development programs in place and robust industry networks, these sectors provide unique advantages to companies operating within these industries.

**2022 Industry Types by Real Estate, Investment and Jobs**

By Industry	GEO Average SF Min	GEO Average SF Max	GEO Average Acres Min	GEO Average Acres Max	% Requesting Existing	% Top Request by Property Type and/or Space	Investment ( GEO AVG)	Jobs (GEO AVG)
<b>All Projects received with R.E. Requirements</b> (* total industries)	60,000	93,000	19	34	77% request Existing (Both + Existing)	Request Existing Industrial (no flex): 42%	\$ 37 Million	180
Advanced Manufacturing	70,000	110,000	20	36	69% request Existing	Request Existing Industrial Space (no flex): 44%	\$ 43 Million	190
Life Sciences, Biotech	55,000	90,000	25	50	75% request Existing	Request JUST Land: 28%	\$ 120 Million	250
HQs, Shared Services, Call Centers	30,000	55,000	15	27	94% request Existing	Request JUST Class A Office Space: 28%	\$ 35 Million	150
Software/IT	19,000	35,000	10	10	100% request Existing	Request JUST Class A Office Space: 45%	\$10 Million	70
SmartGrid, CleanTech	100,000	200,000	30	70	75% request Existing	Request Existing Industrial Space (no flex): 45%	\$ 43 Million	320

Source: WCED 2022 Annual Trends Report

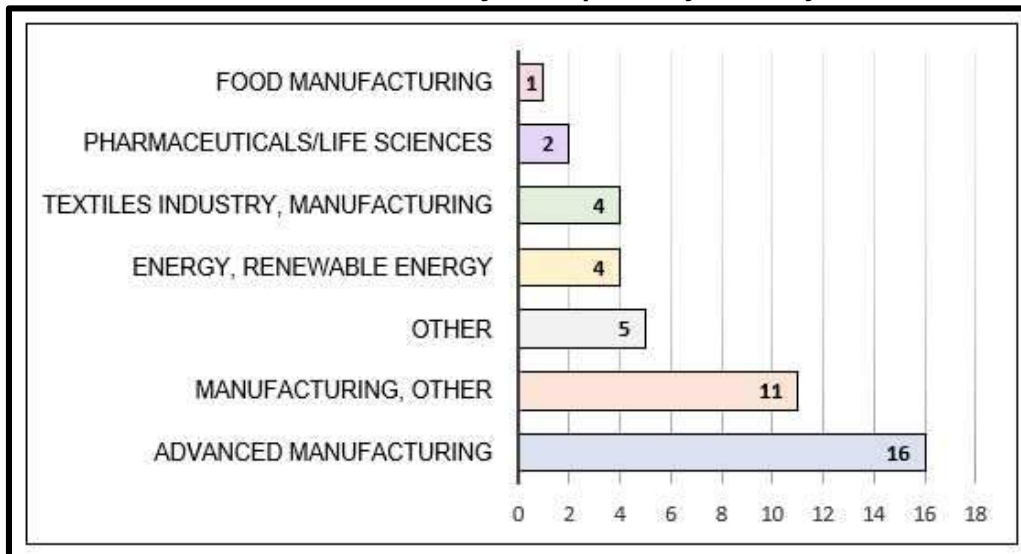
The next two charts are compiled from the 2023 Town of Zebulon project data which, as mentioned in the introduction, includes project data occurring over a 12-month period between February 2023-January 2024. Data from the Town of Zebulon indicates 42 projects received that have an Existing Building request of 150,000 square feet or less and projects requesting 25 acres of land or less. The data provided by Zebulon includes a wider range of industries, including the following additions not referenced in WCED’s 2022 report: “Manufacturing, Other”, “Energy, Renewable Energy,” “Textiles, Manufacturing,” and “Food Manufacturing.”

**2023 Industry Types by Real Estate**

Industry	Existing Building	Both	Sites	SF Request (Ave.)	Acreage Request (Ave.)
Advanced Manufacturing	69%	19%	12%	50,000	17
Manufacturing, Other	46%	27%	27%	72,000	13
Other (Call Center, Warehousing/Distribution)	60%	20%	20%	28,000	10
Energy, Renewable Energy	50%	-	50%	30,000	15
Textiles, Manufacturing	75%	-	25%	67,000	20
Pharmaceuticals/Life Sciences	50%	-	50%	75,000	15
Food Manufacturing	100%	-	-	50,000	-

Source: Town of Zebulon Project Data

**2023 Number of Project Requests by Industry**



Source: Town of Zebulon Project Data

When we consider Zebulon’s existing industrial and commercial makeup, while also analyzing property request trends, it would be advantageous for Zebulon to consider data included in the charts above when identifying target industries and associated industrial and commercial strategies that would be of best and highest use for the Town.



For example, consider the following breakdown of the Advanced Manufacturing and Life Sciences industry data:

### Advanced Manufacturing

**2022:**

- 69% requesting Existing Buildings
- Average Building Square Foot Minimum: 70,000
- Average Building Square Foot Maximum: 110,000
- Average Acres Requested: 20 (Minimum); 36 (Maximum)
- Jobs: 190
- Capital Investment: \$43M (2<sup>nd</sup> highest of all industries)

**2023:**

- 69% requesting Existing Buildings
- Average Square Feet Requested: 50,000
- Average Acres Requested: 17
- Largest frequency of requests (16 of 43 total projects)

For both years, we see the Advanced Manufacturing industry is predominantly seeking Existing Buildings. We can also gain perspective on the size of the buildings and understand this is already a successful and supported industry within Wake County (as an existing targeted industry) and proves to be an industry that is continuing to seek real estate properties for expansions and new locations (37% of all projects in Zebulon’s data were represented by this industry). Based on 2022 data, we can see there are a high number of new job and capital investment opportunities associated with this industry, while not requiring a very large real estate footprint.

According to Wake County Economic Development, there are over 300 companies operating within the Advanced Manufacturing industry in Wake County including GSK, Buhler, ABB, John Deere, Cisco, and more. With more advanced technologies needed to succeed in this industry, Wake County provides specializations in IoT, data analytics, software development, and robotics that allow Advanced Manufacturing companies to have a competitive advantage. In addition, this industry has access to some of the best talent in the nation with educational programs catered towards Manufacturing starting with the K-12 system. This continues to be a healthy and growing industry for Wake County.<sup>66</sup>

### Life Sciences

**2022:**

- 75% requesting Existing Buildings
- Average Building Square Foot Minimum: 55,000
- Average Building Square Foot Maximum: 90,000
- Average Acres Requested: 25 (Minimum); 50 (Maximum)
- Jobs: 250 (2<sup>nd</sup> highest of all industries)
- Capital Investment: \$120M (highest of all industries)

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<sup>66</sup> <https://raleigh-wake.org/target-industries/advanced-manufacturing>

**2023:**

- 50% requesting Existing Buildings
- Average Square Feet Requested: 75,000
- Average Acres Requested: 15

In 2022, 75% of Life Science projects were requesting Existing Buildings. For 2023, in our smaller pool of data, that percentage is at 50%, with the other half requesting an average land plot of 15 acres. The size of existing buildings being requested is comparable to the Advanced Manufacturing industry, with a minimum and maximum average request of 55,000 and 90,000, respectively, in 2022 and an average square footage request of 75,000 for our smaller pool of data in 2023. The Life Sciences sector, on average, has the highest capital investment amount (\$120 million) and the second highest amount of jobs per project (250 average new jobs) in 2022 data.

Although frequency of requests within the 2023 Zebulon data is smaller with only two project requests represented in our data pool, this industry is a legacy industry for the Research Triangle Region and has consistently ranked among the top 5 hubs in the US, competing with major cities like Boston, San Diego, and San Francisco. North Carolina and the Research Triangle Region have been pioneers in this field for over 50 years, starting with the establishment of Research Triangle Park, which has facilitated deliberate and strategic industry growth. In fact, in January 2024, global real estate firm JLL named the Research Triangle Region as the #1 Hub for Biomanufacturing. According to an article published by the North Carolina Biotechnology Center, JLL stated the following as to why they chose the Triangle region in their study:

“As there is more pressure than ever to speed up the drug development process, Raleigh-Durham is uniquely positioned to meet the need. With a rich history of large-scale biomanufacturing in the Research Triangle Park and the market’s outlying counties, a critical mass of workers is present. Research and development from the market’s three tier-one universities has facilitated an emerging lab market. Bridging the gap is a healthy pipeline of pilot manufacturing real estate with plenty of land, a growing talent base and an increasingly favorable business environment to catalyze the entirety of the drug development life cycle.”<sup>67</sup>

The Life Sciences industry has also been a popular target for redevelopment projects across the Triangle which have proven to be successful in the recruitment of life sciences companies. The next section will dive further into those project examples.

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<sup>67</sup> <https://www.ncbiotech.org/news/jll-names-research-triangle-nations-top-biomanufacturing-hub>

# TARGETED INDUSTRIES

Cultivating a diverse local economy is a goal for Zebulon, and identifying targeted industries for the Town's proactive efforts will help achieve this goal. **We recommend that more proactive marketing efforts focus on Life Sciences, Food Manufacturing, and Advanced Manufacturing.** Data presented in this report and the Environmental Assessment can be used to tell a compelling story as to why companies within these industries would find a supportive and competitive environment by locating in the Town of Zebulon.

In addition, **we recommend a more passive approach with two of Wake County's targeted industries: Smart Grid/CleanTechnology and Headquarters.** While there is more to be gained from focusing resources and efforts on Life Sciences, Food Manufacturing, and Advanced Manufacturing, Zebulon can consider opportunities that are presented from Smart Grid/CleanTechnology and Headquarters projects, while taking into consideration the following information:

- Smart Grid/CleanTechnology – typically requires a larger footprint and would require a more focused marketing strategy.
- Headquarters – Wake County Economic Development is putting forth effort to recruit more headquarters to the County, so Zebulon may see the effects of this in the future. Some municipalities within the county are creating a clause within their incentive policies that is specifically targeting Headquarters, and this could be low hanging fruit for Zebulon to explore.

Finally, Shared Services/Call Centers and Software/IT industries do not warrant a heavy focus for Zebulon due to the industry's higher demands for traditional office space. These industries are more likely to locate in areas throughout the Triangle that have existing Class A or Class B office buildings.

# BEST AND HIGHEST USE OF INVENTORY

As of January 2024, Zebulon has a very small amount of inventory to recruit businesses. Zebulon has small parcels of land that have either been sold to multiple owners or listed for sale. There are not currently viable pieces of property for the Town to individually pursue for future industrial developments. There is one piece of land in the industrial park, and one or two vacant buildings that should be marketed for uses that fall within the target industries. **We recommend any future buildings that become available due to an employer leaving are met with a strong marketing and recruitment strategy to fill the space with the targeted industries that the Town has identified.**

**We recommend that Zebulon agree to a targeted industry list and then build out a marketing strategy that tells the story of why Zebulon is an ideal location for business.** By promoting this story to stakeholders, partners, and the local developer community, Zebulon can secure interest and buy-in, with the goal that the right investments can be made for building new product or redeveloping buildings and sites that can house future employers. It is essential for Zebulon to

understand the real estate demands of each industry so that developers build the right type of space for future employers and not simply build with the unfortunate outcome of vacant space.

# REDEVELOPMENT PROJECT EXAMPLES IN WAKE COUNTY

As we have seen from the real estate data in this report, there is a high demand for existing, industrial, and flex buildings for companies who are looking to relocate or expand their business in Wake County. One way that economic development partners and developers are taking advantage of this demand is through creative redevelopment projects. This section presents examples of those successful projects across the Research Triangle Region that would be advantageous for the Town of Zebulon to explore further as they build their strategy and vision for future commercial and industrial opportunities across the Town.

## THE STITCH



Source: Gensler

### *Former Outlet Mall in Morrisville turned into State-of-the-Art Genetic Testing Facility*

In 2019, Equator Capital Management acquired the Morrisville Outlet Mall and revealed its plan to transform the structure into a distinctive office environment named "The Stitch."<sup>68</sup> The project seamlessly combined repurposing efforts with a goal to enhance facilities through the redevelopment of the Morrisville Outlet Mall. In collaboration with Equator Capital Management and architectural firm Gensler, Kimley-Horn undertook the task of revitalizing both the building and its surroundings. The project's name, "The Stitch," reflects the transparent communal space that effectively "stitches" the entire site together. This shared area fosters a sense of community, collaboration, and innovation. Additionally, a comprehensive indoor and outdoor amenity program

<sup>68</sup> <https://www.gensler.com/projects/the-stitch>

was strategically implemented to optimize leasing and revenue goals for the project.<sup>69</sup> In April of 2021, Invitae, a leading life sciences genetic testing company, announced plans to open a new facility in Morrisville, North Carolina, using the former outlet mall and “The Stitch” as its base for a state-of-the-art genetic testing facility including lab, warehouse and office space. Invitae’s new 175,000 square foot East Coast facility is a state-of-the-art laboratory and production space with advanced features such as heavy mechanical support, extensive cold storage capabilities, uninterruptible power supply, and flexible infrastructure. The design emphasizes ultimate flexibility, allowing easy reconfiguration of equipment to adapt to evolving scientific processes and workflow changes. Incorporating a variable refrigerant flow HVAC system and compressed dry air package, the facility minimizes the need for infrastructure modifications as Invitae’s programs evolve. The workspace also prioritizes employee experience with amenities like a coffee bar, café, gym, and courtyards, creating an energetic environment that transforms the former retail mall space.<sup>70</sup>

- **Previous Use:** Outlet Mall
- **Current Use:** Life Sciences, Research & Development, Office Space, Amenity & Recreational Space
- **Timeline:** 2019-2022 (estimate)
- **Square Footage:** 245,000 Square Feet (redeveloped building space); 25 acres
- **Partners on Project\*:** Equator Capital Management Group, Kimley Horne, Gensler, 35 North, Invitae

### Before

Outlet mall food court prior to transition to flex and warehouse space.



Source: 35° North

### After

<sup>69</sup> <https://www.kimley-horn.com/project/rtp-redevelopment-project-the-stitch/>

<sup>70</sup> <https://www.35n.com/insights/how-invitaet-turned-a-former-mall-into-laboratory-production-center/>

Former outlet mall after the transition to Invitae's flex and warehouse space.



Source: 35° North



Source: Worthington Images via ENR



Source: 35° North

# THE MIDTOWN BIOCENTER



Source: Arco Design/Build

## Former Kroger Grocery Store in Raleigh, Redeveloped into Life Sciences BioCenter

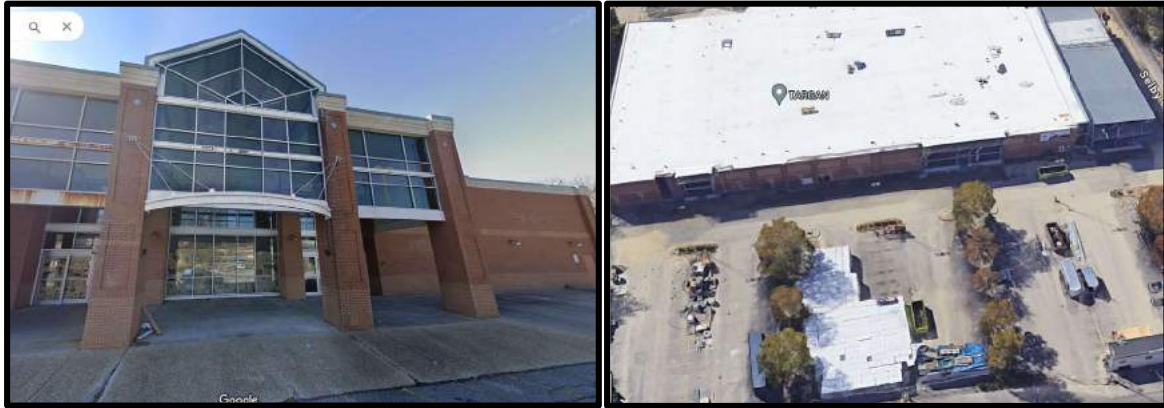
The shopping center, previously featuring a Kroger grocery store at the crossroads of Six Forks Road and Wake Forest Road in Raleigh, NC, has undergone a 14-month redevelopment. It has been transformed into the Midtown BioCenter, encompassing 80,000 square feet for lab and manufacturing space and an additional 20,000 square feet dedicated to offices. Currently, the entire 100,000 square foot site is occupied by Targan, an Ag-Tech company that produces high-speed, automated systems – like vaccine systems – to humanely maximize livestock production without using chemicals or antibiotics<sup>71</sup>.

- **Previous Use:** Grocery store
- **Current Use:** Ag-Tech, Life Sciences, Research & Development, Manufacturing.
- **Timeline:** November 2021-December 2022
- **Square Footage:** 100,000 Square Feet (redeveloped building space)
- **Partners on Project:** CBRE | Raleigh, East West Partners, ARCO Design/Build, Redline Design Group, TARGAN (<https://wolfmediausa.com/2022/08/09/news-release-upcoming-midtown-biocenter-fully-leased-to-morrisville-based-life-sciences-company/>)

<sup>71</sup> <https://wraltechwire.com/2023/09/12/life-science-facility-opens-in-old-raleigh-grocery-store/>



Before



Source: Google. Image Capture Date: February 2022

After





*Source: Arco Design Build*

# INQ 1101



Source: LoopNet

## *Former Sam's Club in Morrisville redeveloped for Class A office space, advanced manufacturing, and life science tenants*

In December 2018, Mainstreet acquired a 140,000 square foot building in Morrisville, North Carolina, that was previously a Sam's Club. The company proceeded to rezone the building for office use and completed its full renovation by the summer of 2020. Situated on the outskirts of the Research Triangle Region, Mainstreet intentionally adapted the office space to offer flexibility for life science tenants. As the demand for COVID vaccines surged, the fully leased building was eventually sold at a profit in 2021<sup>72</sup>.

Currently, the space is fully leased to Schneider Electric (65,000 square feet) operating in the Smart Technology/Clean Technology space and Azzur Cleanrooms (75,000 square feet), a life sciences company offering on-demand cleanrooms, advisory and consulting services for early-phase manufacturing<sup>73</sup>.

- **Previous Use:** Warehouse Club; Retail Store
- **Current Use:** Advanced Manufacturing, Office Space, Life Sciences, Research & Development
- **Timeline:** December 2018-June 2021
- **Square Footage:** 140,000 Square Feet (redeveloped building space)
- **Partners on Project:** Mainstreet Capital Partners, JLL, DRA Advisors

<sup>72</sup> <https://www.mainstreetcapital.com/featuredassets/inq1101>

<sup>73</sup> <https://www.citybiz.co/article/72854/jll-and-mainstreet-capital-partners-close-deal-with-azzur-cleanrooms-on-demand-at-inq-1101/>

Before



Source: JLL

After





Source: LoopNet

# RALEIGH IRON WORKS



Source: Raleigh Iron Works

## Historic mills and warehouse buildings converted into a mixed use campus.

Raleigh Iron Works, honored with the TCREW Champion Awards Best Redevelopment Project of the year, has successfully converted historic mills and warehouse buildings into a diverse mixed use campus. Spearheaded by the Grubb Ventures team and situated at the crossroads of Five Points, Person Street, and Mordecai neighborhoods in Raleigh, this 200,000 square foot development showcases creative office spaces, retail establishments, and covered parking, all designed with a contemporary industrial flair. Retaining numerous original elements like exposed structures and existing concrete, the project also offers outdoor amenities such as built-in fireplaces, courtyards, and secluded terraces. Adding a touch of whimsy, the unique development includes an adult slide connecting the second floor of the Double Gable Building to the plaza<sup>74</sup>.

- **Previous Use:** Former Peden Street and includes two historic warehouse structures that were re-purposed for modern uses
- **Current Use:** The district includes office, residential, retail, and parking and connects to an adjoined adaptive reuse warehouse project, creating a creative hub near downtown Raleigh
- **Timeline:** 2021-2023
- **Square Footage:** 26-acre site; 116,000 square feet of office and retail space and 83,000 square feet of adaptive reuse of an existing steel production facility and mill and features commercial office and ground-level retail, office space, and covered parking
- **Partners on Project:** Grubb Ventures, Stewart Inc., Jameson Properties, Cline Design Associates, LS3P, S9 Architecture (<https://stewartinc.com/portfolio-post/raleigh-iron-works/>)

<sup>74</sup> Triangle CREW

# GATEWAY PLAZA



Source: Gateway Plaza

## Former Winn-Dixie reimaged and redeveloped into retail and office, mixed use space

Gateway Plaza is a revamped retail and creative office undertaking spanning more than 75,000 square feet on the outskirts of downtown Raleigh. The shopping center once anchored by Winn-Dixie has undergone substantial redevelopment to emerge as a focal point for the nearby residential neighborhoods and beyond<sup>75</sup>.

Gateway Plaza is now home to Raleigh Founded co-working space, retail shops, restaurants, breweries, art galleries and more<sup>76</sup>.

- Previous Use: Grocery store
- Current Use: Office and retail
- Timeline: 2017-2019
- Square Footage: 75,000 Square Feet
- Partners on Project: Loden Properties

<sup>75</sup> <https://northpond.com/portfolio/gateway-plaza/>

<sup>76</sup> <https://www.gatewayplazaraleigh.com/>

# INQ 4300

## Before | After:



Source: Google; Image Capture: February 2018  
Source: CommercialEdge

## Abandoned Kmart in Garner, purchased for life science redevelopment

According to the Triangle Business Journal, a former Kmart Super Center in Garner is poised for a transformation into life science space. Florida-based Mainstreet Capital Partners and a fund managed by New York-based DRA Advisors have jointly acquired the property at 4300 Fayetteville Road for \$14.25 million. The 180,017 square foot building, constructed in 1994 on 26.73 acres, was anchored by Kmart until 2013 and currently has an assessed value of \$7.3 million. Mainstreet Capital Partners and DRA Advisors, known for their collaboration in transforming a former Sam's Club into adaptive space INQ 1101 in Morrisville, aim to meet the demand for strategic and innovative lab space in Raleigh with the Garner property, named INQ 4300. The envisioned changes include laboratory and production areas, a revamped building façade, a new roof, and outdoor amenity spaces, with the renovations expected to be completed by the end of the summer. Peter Tonon, a partner at Mainstreet Capital Partners, expressed anticipation for bringing their vision to life.<sup>77</sup>

- **Previous Use:** Grocery store
- **Current Use:** Life Sciences (Laboratory, production, outdoor amenities)
- **Timeline:** December 2021-August 2022 (Shell Completed; ready for tenant upfit)
- **Square Footage:** 180,000 SF
- **Partners on Project:** Mainstreet Capital Partners, DRA Advisors, JLL

<sup>77</sup> [https://www.vanderweil.com/sites/default/files/paper\\_files/2021\\_former\\_kmart\\_reshaped\\_for\\_life\\_sciences.pdf](https://www.vanderweil.com/sites/default/files/paper_files/2021_former_kmart_reshaped_for_life_sciences.pdf)



# CONCLUSION AND IMPLICATIONS FOR ZEBULON

Smaller amounts of land allocations for commercial and industrial uses in the Town of Zebulon will require a targeted and strategic approach to achieve the guiding principles laid out within the Comprehensive Land Use Plan that are focused on being balanced and resilient. Balance will be achieved by having both great neighborhoods and living options, while also being an attractive host community for employers and a wide array of small businesses. Being resilient will be achieved through a diverse local economy that will continue to attract investment and generate jobs over the long term, while bolstering the Town's tax base.

As Zebulon continues to refine a strategy for attracting new business and industry to the Town, the data presented in this report on commercial and industrial real estate trends, as well as future reports that are published by Wake County Economic Development, will be important criteria to review and utilize when determining the development or redevelopment of assets within the Town. This data, along with a clear vision, will need to be communicated to developers and stakeholders who will be partners to the Town in executing commercial and industrial real estate projects that will serve as attractive options for future employers of the Town of Zebulon.

# VISION DEVELOPMENT

Vision: *Zebulon will foster an inclusive, vibrant, diverse, and sustainable economy. Zebulon will be a regional player that prioritizes intentional and responsible growth while retaining the Town's unique charm and character.*

The Community Workgroup's shaped insights from the stakeholder engagement findings into the vision statement. The vision components below provide further detail on the meaning of the vision.

- Big Town Economy, Small Town Feel
  - Smart growth
  - Anticipation of future growth (transportation and utility improvements)
  - Location (central convergence point)
  - Retain unique charm and character
- Regional Player
  - Regional collaboration
  - Attract and retain businesses
  - Recruit new industries
  - Regional economic influence
  - Zebulon does not need to be all things to all people
- Honoring Town History
  - Agrarian roots
  - Rich history
- Inclusive, Vibrant, and Diverse
  - Mitigate displacement and gentrification
  - Connectivity and walkability
  - Entertainment, full-service restaurants, and shopping
  - People of all races, socioeconomic groups, ages, education levels, cultures, and beliefs
- Sustainable
  - Affordable and workforce housing
  - Executive housing
  - Balanced mix of residential development
  - Attractive, but not cheap, place to live

# PUBLIC ENGAGEMENT OVERVIEW

The Town of Zebulon gathered resident opinions and used those insights to inform this economic development strategic plan. Brief descriptions of the various public engagement activities are shown below, with the full summaries linked to later in the Appendix.

## COMMUNITY CAFÉS

Between October and November 2023, the Town held three community cafés where the public could express their opinions, concerns, and preferences on issues related to economic development. Almost 100 community members participated in the three events.

One major theme reflected in the café responses is participants' desire for **community development**, creating assets that benefit the people who live in Zebulon and improving their quality of life. There was an overall preference to make the experience of living in Zebulon better and more complete without the need to commute out of town for amenities such as healthcare and recreation. Another key theme was maintaining the small-town character. Overall themes from the cafés have been summarized below.

- **Infrastructure**
  - Public Transportation
    - Interconnecting Zebulon
    - Connecting Zebulon to the surrounding areas
    - Creating awareness and accessibility for all communities and abilities
      - Services for the elderly and those with accessibility challenges
  - Roads and Pathways
    - Reducing traffic in Zebulon
    - Improved streets
    - Improved, safe walkability
    - Sidewalks, bike lanes, and greenways
  - Utilities: Water, sewer, electricity, Wi-Fi
- **More and Better Amenities and Businesses**
  - Entertainment and Recreation: Youth and family-specific, activity center, arcade, movie theater, skate park, bowling, pool/aquatic center
  - Healthcare
    - Primary care and family doctors
    - Mental health services
    - Orthodontists and dentists
    - Physical therapists

- Restaurants
  - More options and variety
  - Sit-down, not just fast food
  - Food hall
- Exercise and Sports: YMCA, evening fitness classes, gym, pool, pickleball
- Grocery
  - Butcher, baker, and other specialty shops
  - Lidl, Publix, and Aldi
- **Improved Quality of Life**
  - Education and Training
    - More schools; a high school
    - Entrepreneurship program
    - Workforce development
    - Access to Wake Tech
  - Housing
    - Affordable, accessible, and quality
    - Policies to prevent relocation due to gentrification
    - More variety (55 and older, temporary, accessory dwelling units, etc.)
- **More and Better Jobs**
  - More variety (full-time, entry-level, possibility for advancement, flexible, remote)
  - Better pay
  - More accessible jobs (public transportation)
  - Opportunities for youth employment
- **Town Support**
  - Government liaison to act as a “one-stop-shop” resource
  - Grants, loans, and tax incentives for start-ups
  - Streamlined government processes (like with permit approval)
  - Accessible and well-communicated resources and public services

## COMMUNITY SURVEY

An online survey was opened to the public to gather information on resident economic development opinions and preferences. The survey was offered in English and Spanish and had a total of 151 responses.

- **People live in Zebulon for...**
  - Housing affordability
  - Family ties
  - Quality of life
  - Local character/charm
  - Ability to commute to jobs outside of Zebulon
- **People want more...**
  - Full-service restaurants
  - Grocery stores
  - Entertainment
- **Priorities for future growth and development...**
  - Attainable/affordable housing options

- More entertainment options
- Developing Downtown
- **Priorities for jobs...**
  - Technology/Information Technology
  - Service Industry
  - Higher Pay/Living Wage
  - Healthcare
- **How the Town can help...**
  - Limiting overdevelopment
  - Affordable housing
  - Affordability and funding
  - Avoid gentrification

## **STAFF DESIGN THINKING RETREAT**

In December 2023, a staff design-thinking retreat was held with members of Zebulon town staff, Zebulon community members, and Wake County staff. Participants reviewed the findings of the community cafés, survey, and Environmental Analysis. Participants also engaged in design-thinking to better understand how community members and business interact with the Town on economic development issues and strategize how to improve these interactions.

## **COMMUNITY WORKGROUP**

In February and March 2024, three community workgroup sessions were held with members of Zebulon's economic development space. Workgroup members reviewed the work of the previous community engagement events and use this information to propose and develop the economic development strategic plan's vision, focus areas, and priorities.

# COMMUNITY CAFÉS SUMMARY

## INTRODUCTION

The Town of Zebulon engaged Fountainworks to help host community cafés where the public could express their opinions, concerns, and preferences on issues related to economic development. Three community cafés were conducted between October and November 2023 with 87 people participating across all three events. This document summarizes the information gathered from the three community cafés to continue to inform and guide the development of the Town’s economic development strategic plan. **More comprehensive results from each café can be found in their respective reports.**

### The average participant

- has lived in Zebulon 1-4 years
- was 45 or older
- lives, but does not work in Zebulon

The Town of Zebulon is dedicated to gathering citizen opinions and using them to inform the economic development strategic plan. The qualitative methodology employed promotes engagement and enables us to understand community preferences and concerns.

summarized below.

The demographic data of café participants is

### How long have you lived in Zebulon?

Less than 1 year	<b>1-4 years</b>	More than 5 years	More than 10 years
3	<b>37</b>	7	24

### What is your age?

17 or younger	18-34	35-44	<b>45-64</b>	<b>65 or older</b>
2	6	10	<b>22</b>	<b>22</b>

### Do you live and/or work in Zebulon?

<b>Live, but not work</b>	Work, but not live	Live and work	Neither
<b>38</b>	5	15	2

## METHODOLOGY

After all café responses were received, Fountainworks staff assigned each response at least one theme. For each question, theme frequency was calculated and used as a measure of public sentiment.

# OVERALL THEMES

A major overall theme reflected in the café responses is participants' desire for **community development**, creating assets that benefit the people who live in Zebulon and improving their quality of life. There was an overall preference to make the experience of living in Zebulon better and more complete without the need to commute out of town for amenities such as healthcare and recreation. Another key theme was maintaining the small-town. Overall themes from the cafés have been summarized below.

Infrastructure	
<b>Public Transportation</b>	<ul style="list-style-type: none"> <li>- Interconnecting Zebulon</li> <li>- Connecting Zebulon to the surrounding areas</li> <li>- Creating awareness and accessibility to all communities and abilities                             <ul style="list-style-type: none"> <li>o Services for the elderly and those with accessibility challenges</li> </ul> </li> </ul>
<b>Roads &amp; Pathways</b>	<ul style="list-style-type: none"> <li>- Reducing traffic in Zebulon</li> <li>- Improved, safe walkability</li> <li>- Improved streets</li> <li>- Sidewalks, bike lanes, greenways</li> </ul>
<b>Utilities</b>	<ul style="list-style-type: none"> <li>- Water, electric, Wi-Fi , sewage</li> </ul>
More and Better Amenities and Businesses	
<b>Entertainment &amp; Recreation</b>	<ul style="list-style-type: none"> <li>- Youth- and family-specific</li> <li>- Activity center</li> <li>- Bowling, arcade, movie theater, pool/aquatic center, skate park</li> </ul>
<b>Healthcare</b>	<ul style="list-style-type: none"> <li>- Primary care and family doctors</li> <li>- Mental health services</li> <li>- Orthodontists and dentists</li> <li>- Physical therapists</li> </ul>
<b>Restaurants</b>	<ul style="list-style-type: none"> <li>- More options &amp; variety</li> <li>- Sit-down, not just fast food</li> <li>- Food hall</li> </ul>
<b>Exercise &amp; Sports</b>	<ul style="list-style-type: none"> <li>- Evening fitness classes</li> <li>- Pool, gym, pickleball, YMCA</li> </ul>
	<b>Grocery</b> <ul style="list-style-type: none"> <li>- Butcher, baker, and other specialty shops</li> <li>- Lidl, Aldi, Publix</li> </ul>
Improved Quality of Life	
<b>Education &amp; Training</b>	<ul style="list-style-type: none"> <li>- More schools; a high school</li> <li>- Entrepreneurship programs</li> <li>- Workforce development</li> <li>- Access to Wake Tech</li> </ul>
<b>Housing</b>	<ul style="list-style-type: none"> <li>- Affordable, accessible, and quality</li> <li>- More variety (55+, temporary, ADUs, etc.)</li> <li>- Policies to prevent relocation due to gentrification</li> </ul>
Miscellaneous	
<b>Town Support</b>	<ul style="list-style-type: none"> <li>- Government liaison to act as a “one-stop-shop” resource</li> </ul>

	<ul style="list-style-type: none"> <li>- Grants, loans, and tax incentives for start-ups</li> <li>- Streamlined government processes (like with permit approval)</li> <li>- Accessible and well-communicated resources and public services</li> </ul>
<b>Need more and better jobs</b>	<ul style="list-style-type: none"> <li>- More variety <ul style="list-style-type: none"> <li>o Full-time, entry-level, possibility for advancement, flexible, remote</li> </ul> </li> <li>- Better pay</li> <li>- More accessible jobs (public transportation)</li> <li>- Opportunities for youth employment</li> </ul>

More detail on responses is included in the following sections, organized by question. Unless otherwise noted, themes are listed in the order of frequency in which they occurred, beginning with the most common.

# BUSINESS

If you were going to start a business in Zebulon, what are some of the factors you would consider?

- **Infrastructure**
  - o Water, sewer, utilities, internet, roads, and the conditions of buildings
- **Town Support**
  - o The community stressed the importance of the Town acting as a resource and ally to new business owners.
  - o Support in the permit approval process, including who to ask for help
  - o Loans and grants for start-ups
- **Educational and Training Opportunities**
  - o Skilled labor and education of workforce
  - o Quality of schools

What can the Town do to make Zebulon more attractive for entrepreneurship?

- **Town support**
  - o Entrepreneurship programs and business incentives
  - o Accessible resources and support in the permitting process
- **Ease of government processes**
  - o Be business-friendly
  - o Streamlining and facilitating the permitting process
  - o A government liaison to act as a “one-stop-shop” and resource for citizens
- **Funding and Costs**
  - o Grants, tax breaks, subsidies
- **Quality of life**
  - o A location that attracts people
  - o Programs for children
  - o Schools and churches

What businesses are not in Town that you would like to see in town? What do you have to leave Zebulon for?



- **Entertainment and Recreation**
  - **Youth- and family-entertainment** were specifically emphasized.
    - More children’s events
    - Youth/teen center
  - Bowling alley, arcade, roller skating, movie theater, concert center
- **Restaurants**
  - Food hall, sit-down options, not just fast food
  - More variety (Thai, seafood, vegan, healthy)
- **Retail**
- After these three categories, **exercise and sports** and **grocery** were cited at the same rate.

Detailed “Business” responses for these themes can be found in the [appendix](#).

# JOBS

At all three cafes, participants unanimously stated that **Zebulon does not have the right kinds of jobs for residents**.

Participants specifically noted:

- a **need for higher paying jobs**
- a general **lack of businesses** in Zebulon
- an overall lack of jobs

“Lots of entry-level, but not middle-management or ability”

Are these jobs located where people can easily get to them?

- **People are commuting out of Zebulon for work.**
  - Some responses noted that some people prefer to live in Zebulon and commute out of town for work
  - Others said commuting out of Zebulon was necessary for employment
- **Lack of businesses and jobs**
- **Inaccessibility**
  - The jobs that are in Zebulon are hard to get to
  - The need to better interconnect the town

“Zebulon is safe, offers homes to people working outside the”

Do these jobs meet the community’s needs?

- The general consensus was **no**.
- **The community needs**
  - **Jobs with higher pay**
  - **Education and training**
  - **Better jobs**, generally

Detailed “Jobs” responses for these themes can be found in the [appendix](#).



# AMENITIES

Thinking about qualities that make Zebulon a good place to work and run a business, are there amenities that should be improved such as public transportation, roads, housing, healthcare, education, entertainment etc.?

**Entertainment** was by far the most common response theme.

- People want more options
  - For children, families, and adults
- Activity center
  - Like [the Factory](#) in Wake Forest
- Movie theater
- Bowling
- Museums and educational centers
- Nightlife



**Public transportation**

- The need for a transit system
- Services for the elderly and disabled
- Better connections to Raleigh and Durham
- More community awareness of public services like GoWake

**Healthcare**

- The need for more healthcare in general with more accessibility
- The general lack of all types of health services
- Primary care, pharmacies, orthodontics and dentists, physical therapy, mental health, and a local EMS

The next most common themes were, in order:

- **Road improvement**
- **Sports and recreation**
- **Education and training**
- **Traffic**

Detailed “Amenities” responses for these themes can be found in the [appendix](#).

# DOWNTOWN

What do you like about Zebulon’s downtown?

- **The charm** was the most common response.
- **The history**
- **Downtown events**
- **Walkability**
- **Aesthetics**

“It has a small-town feel. Like it’s small enough to walk in one

**What would make downtown better than it is today?**

- **Restaurants** were the most common theme.
  - More options in general
  - Sit-down options as well as more diverse options
- There was a general sense that while there was room for updates and improvements to downtown, there was also a desire to **maintain the small-town charm and not over-develop.**
- **Improving aesthetics**
  - Curb appeal
  - More trees
  - Improve building facades
- More **entertainment**
  - Event space
  - Youth activities
  - Public music and art
- **Improving walkability and safety**
  - Safe bike lanes and sidewalks
  - More lighting
  - Better access/connection from surrounding bike lanes, greenways, and sidewalks
  - Safer parking
  - Traffic calming

Detailed “Downtown” responses for these themes can be found in the [appendix](#).

# INCLUSION

**Think about the ideas you have generated. If implemented, how might these ideas affect vulnerable and historically underserved communities?**

- The most common theme was **gentrification**.
  - Fear of people being priced out of their homes via higher taxes and having to relocate
  - The suggestion to proactively create policies to protect underserved people from losing their houses
- **Job creation**
  - This included comments about how these ideas could lead to a creation of jobs and activities for youth and more generally, more income opportunities, and a higher quality of life.
- **Community**
  - This process could create both a sense of community and pride in the community and how improved amenities will help the underserved.

“Growth can bring positive and negative. Some will have to relocate.”

How might we take steps to ensure this plan is inclusive and takes into account the perspectives, hopes, and concerns of vulnerable and historically underserved communities?

- The most common theme in responses was the importance of **servicing all communities**.
  - Offering grants to assist communities
  - Ensuring there is good access to amenities and services for vulnerable populations
  - Improving communication with the Hispanic community
  - Creating incentives for vulnerable people and those who serve them (like teachers) in the new developments
- The next most common theme proposed a more targeted approach of **supporting the underserved**.
  - Nice and safe subsidized housing
  - Ensure transit stops service all communities, including those with highest needs.
- **Communication, inclusion, housing, and public transportation** were also popular suggestion themes.

Detailed “Inclusion” responses for these themes can be found in the [appendix](#).

## ZEBULON IN ONE WORD

As each café conversation ended, participants were asked to write down one word that describes the ideal Zebulon economy. These words are summarized below in graphical representation of word frequency that gives greater prominence to words that appear more often.



# CAFÉS APPENDIX

[Participant Demographic Snapshot](#)

[Business Responses](#)

[Jobs Responses](#)

[Amenities Responses](#)

[Downtown Responses](#)

[Inclusion Responses](#)

[Café 1 Summary](#)

[Café 2 Summary](#)

[Café 3 Summary](#)



## Participant Demographic Snapshot

	Café 1	Café 2	Café 3	Total
Attendees	40	12	35	87

### How long have you lived in Zebulon?

	Café 1	Café 2	Café 3	Total
Less than 1 Year	0	0	3	3
1-4 Years	13	1	23	37
More than 5 years	6	1	0	7
More than 10 years	7	10	7	24
Total	26	12	22	60

### What is your age?

	Café 1	Café 2	Café 3	Total
17 or younger	2	0	0	2
18-34	1	1	4	6
35-44	5	0	5	10
45-64	12	3	7	22
65 or older	7	8	7	22
Total	27	12	23	62

### Do you live and/or work in Zebulon?

	Café 1	Café 2	Café 3	Total
Live, but not work	19	4	15	38
Work, but not live	0	2	3	5
Live and work	5	6	4	15
Neither	2	0	0	2
Total	26	12	22	60

*If you were going to start a business in Zebulon, what are some of the factors you would consider?*

<b>Infrastructure</b>		
- Infrastructure	- Water and sewer capacity	- For business: water, internet, electricity
- Infrastructure	- Water & Sewer	- Existing infrastructure (able to move-in)
- Hi-speed internet	- Water Supply/Sewer	
- Amenities	- Infrastructure utilities	
- Infrastructure		

<b>Town Support</b>		
- Can the town be a resource for me as a new business owner	- Partners in community	- Growth plan for downtown Zebulon
- Approval process	- Process	- Support from town
	- Who to ask for help	
	- Grants Loans for start ups	

<b>Educational and Training Opportunities</b>		
- Educational opportunities	- Skilled labor	- Good schools: high schools, community college, etc.
- Education required	- Quality of schools	
- Education of Work force	- Local high school	



What can the Town do to make Zebulon more attractive for entrepreneurship?

<b>Town Support</b>		
- Incentives	- Technical Assistance	- Shared small vendor marketplace for small businesses (share overhead together)
- Pre-built retail park	- Solicit specific and targeted businesses	- Marketing available business incentives, buildings, and vendor opportunities
- Perks/discounts	- Targeted for wake tech students	- Tax breaker
- Actively seek out businesses to come here -- Not fast food, no gas stations, we need sit down restaurants and retail shops	- Educational outreach/mentor	- Provide tax credits/incentives that are competitive
- Offer tax incentives	- Accessible resources	- Support in permits
- Promote growth	- Liaison through process	- Program like Raleigh's NC-score targeted to Zebulon
- Be business friendly	- Ease of Access	
- Grants	- Offer grants through SBA	
- Entrepreneurship Programs (training)	- Offer grants or subsidies: promote better	
- Mentorship programs for entrepreneurs	- Establish relationship with local business owners	

<b>Ease of Government Processes</b>		
- Streamlined business approval process	- Intensify incentive commercial growth efforts	- Bring building permits within town departments
- Less difficulty getting permits – takes too long to open up new businesses	- Streamlining the process	- One person government liaison (one-stop shop)
- Be more tolerable of entrepreneurship	- Remove roadblocks	- Ease of Access
	- Better relationship with Raleigh and County	- Support in permits
	- Be business friendly	

<b>Funding &amp; Costs</b>		
- Reduce cost to buy/rent buildings	- Offer grants through SBA	- Marketing available business incentives, buildings, and vendor opportunities
- Offer tax incentives	- Tax breaker	- Provide tax credits/incentives that are competitive
- Tax breaks	- Shared small vendor marketplace for small businesses (share overhead together)	
- Grants		
- Offer grants or subsidies: promote better		

<b>Quality of Life</b>

- Location that attracts people	- Quality of life	- Schools, churches, programs for children:
- Foot traffic visibility	- Curb appeal	Quality of life
- Traffic	- Update shopping centers (attractive)	

What businesses are not in Town that you would like to see in town? What do you have to leave Zebulon for?

<b>Entertainment and Recreation</b>		
- Family Fun Entertainment – Bowling, Skating, Movies	- Entertainment options	- Teen center
- Fitness Center	- Activities for kids, esp. teens	- Craft cocktail lounge with live music (diverse) and nightlife
- Evening entertainment	- Pool	- A visitor’s destination: museum, art space science center
- More children’s events	- Arcade	- Civic center
- Destinations	- YMCA	- Youth activities: bowling
- Bowling Alley	- Roller Skating for kids	- Concert area inside
- Skating Rink	- Entertainment for families	- Roller skating
- Entertainment family friendly	- Youth/teen centers	- Movies
- Entertainment area near mudcats stadium	- Movies	- More craft beer and distilleries
- Baseball-related: (Mudcats spin-off?)	- Bowling	- YMCA
- Theater/event center	- Venue/event room	
- YMCA	- Experience/customer service is different than buying online	

<b>Restaurants</b>		
- Food (not fast food)	- Restaurants	- Diverse restaurant options and sit-down restaurants
- Ice cream shop	- Sit down restaurants	- Craft cocktail lounge with live music (diverse) and nightlife
- Sit down restaurants (sushi/hibachi, American regional ex Chilis TGIF, fresh sandwiches and soup)	- Thai restaurant	- Restaurants with specialized menu
- Restaurants	- Better sit-down restaurants	- Starbucks
- Seafood Restaurant	- Moe	- Food Halls
- Restaurants	- Hibachi	- Large food chain
- Bakery	- Plant based options	
- Ice cream	- Healthy options	
	- Vegan/Plant based restaurants	
	- Sit-down restaurants	

<b>Retail</b>
---------------

- Variation of specialty stores	- Bicycle shops	- Retail stores
- More retail shops (clothing, housewares)	- Jewelry, shoe, watch repair	- More retail shopping
- Gift shop	- Gift shop	- Craft shoe center
- Bike shop or athletic type store	- Men's and women's clothing	- Retail shopping
- Shop businesses	- Experience/customer service is different than buying online	- Target
- Beauty Supply Store		- Department stores
- Sporting goods shop		- Fed Ex store
		- More retail in downtown

<b>Sports and Exercise</b>		
- Fitness Center	- Gym/exercise/athletic club	- Gyms
- Planet Fitness	- Swimming school	- Indoor/outdoor swimming facility
- Bicycle shops	- YMCA	- More/expanded gym
- Pool	- Wellness center and gym	- YMCA
- YMCA	- Gym	

<b>Grocery</b>		
- Aldi	- Butcher	- Supermarkets
- Upscale Grocery Store	- Bakery	- Lidl or Aldi
- Other grocery stores (Publix)	- Grocery stores	- Grocery stores: specialty
	- Bakery	- Upscale Grocery Store

Does Zebulon have the right kinds of jobs for the people who live here? Why or why not?

<b>Zebulon does not have the right types of jobs</b>		
- Manufacturing jobs are not doing it today	- Need IT jobs and biotech jobs.	- More service industries
- Job fit here at time – but not now	- No – not higher paying jobs	- Not enough business to support large growth
- Too many people moving here. A lot of different skill sets, different salary expectations. Need more variety.	- No. not enough full-time opportunities	- Assessment of job needs
- Not right kind of jobs for new demographic	- No, we need HR jobs	- Diverse jobs
- Need: Ofc/sales jobs, Blue collar jobs	- With more business growth, more jobs will come. The need seems to be more options, not the type of...	- Need more businesses provide more jobs
	- Tech options	- It depends: don't expect some to be here
	- Stem careers	- Lots of entry-level but not middle management/ability to grow
	- Human resources jobs	- Tech options

<b>Need for higher paying jobs</b>		
- We need more industry and bigger companies to pay better salaries.	- We don't have the jobs to increase median income.	- No – not higher paying jobs
- There is a good variety, but not enough and not enough higher paying.	- Jobs aren't high paying enough for people to live here	- Not enough business to support large growth
- Need more companies that pay well	- Need more higher paying jobs	- Lots of entry-level but not middle management/ability to grow
		- Not for the income

<b>Lack of businesses</b>		
- The businesses aren't here	- Incentivize commercial development in entertainment area.	- With more business growth, more jobs will come. The need seems to be more options, not the type of...
- We need more industry and bigger companies to pay better salaries.	- New industrial park?	- Need more businesses provide more jobs
- Need more companies that pay well	- There is a good variety, but not enough and not enough higher paying.	
- Poor retail structure.		

Are these jobs located where people can easily get to them?

<b>People are commuting out of Zebulon for work.</b>		
- We travel to Raleigh, Wilson, etc.	- Some people like working in Raleigh and living here	- Jobs are in Wilson, Raleigh, and Rocky Mount
- Lots commute to Raleigh, Rocky Mount, Wilson	- Not here	- Most drive out of Zebulon

<b>Lack of business and jobs</b>	<b>Inaccessibility</b>
<ul style="list-style-type: none"> <li>- You can't access what's not here.</li> <li>- Not here</li> <li>- Marketing, finance, business type jobs</li> <li>- Diverse jobs (different working environments)</li> </ul>	<ul style="list-style-type: none"> <li>- Not here</li> <li>- Not really</li> <li>- Layout of town needs connected</li> <li>- Jobs are located in the same area... spread it out</li> </ul>

Do these jobs meet the community's needs?

<b>Jobs with higher pay</b>		
- The jobs we want need to be targeted to higher pay.	- No, more professional jobs	- Need higher paying jobs
- No, pay is too low for many jobs	- Need higher paying jobs without commuting	- Need more higher income jobs

<b>Education and training</b>		
- Wake tech can help with training	- On-the-job training	- More opportunities for young adults: the grocery, target
- Internship program/opportunity for growth	- More teachers	
	- Curriculum of Wake Tech connected to our needs	

Thinking about qualities that make Zebulon a good place to work and run a business, are there amenities that should be improved such as public transportation, roads, housing, healthcare, education, entertainment etc.?

<b>Entertainment</b>		
- Banquet center	- Pools, splash pads, parks for kids	- Movies
- Bowling Alley	- Large scale event center	- Skate park
- Movie Theater	- Events center	- Entertainment
- Event Center	- Movie Theater	- Autism services and parks (1 in 35)
- Concert venue	- Family friendly entertainment	- Pickleball courts
- Adult entertainment (diner and theatre)	- Concerts	- Entertainment: skating (ice and roller), bowling, arcade, movies, putt putt, or top golf
- Place for kids and teens entertainment for family (arcade, bowling alley, etc.)	- Something to do without leaving town	- Inside concert auditorium venue
- Movie theater in Wedgewood (carlic) shopping center	- Youth center	- Entertainment for adults not centered around alcohol
- Roller skating/skateboarding facility	- Museum	- Recreation/Entertainment
- Smallish convention center	- Event/civic center	
	- Amphitheater	
	- Family activities	
	- Need entertainment, movie	

<b>Public Transportation</b>		
- Transit system	- Wake County Bus Collector (Wake Tech as a hub)	- Improve public transportation
- Services for elderly/disabled (transportation)	- Bus/transportation	- Access to Wake Tech/transportation
- Keep GoWake SmartRide	- Need more public transit	- Transit / transportation
- Bus station – mass transit	- Rapid transit line for bussing	- Transportation of elderly
- Better connections to Raleigh and Durham	- Improved smart ride	- Transportation for teens to rec center
- Community awareness of public services (GoWake)	- Transportation buses	- Public transportation: bus, train, sidewalks, bikes
- Transportation to Wake Tech	- Bus service	
	- Public transportation	
	- Bird scooters	

<b>Healthcare</b>

- Hospital	- Medical park	- Wake med
- More healthcare	- Pharmacies	- Home health care agency
- Regional medical park	- Family doctors	- Local EMS
- Hospital	- Mental health care	- Doctors
- Healthcare Wendell Falls	- Orthodontics and dentists	- Physical therapy
- Healthcare	- More healthcare with longer open hours	- Health care, medicine
- Physical therapy: 1 for 10,000 people		- Hospital

<b>Road &amp; Traffic Improvement</b>		
- Improve roads to help alleviate traffic congestion with all the new houses built and people moving in	- Round about instead of 4 way stops	- Better roads and parking
- Expand/wide roads	- Street lights	- EV charging stations
- Improved roads	- Better roads	- More sidewalks: future could add scooters/bike rentals
- Improved roads	- Better roads	- Round-a-bouts
- Improve roads	- Better roads for less traffic	- Improvement in roads
- Sidewalks to connect each other for bikes/walker	- Address traffic in town and out of town	- Bike lanes
	- Greenway trails to downtown	- Better lights

<b>Sports and Recreation</b>		
- Need more evening fitness classes	- Pools, splash pads, parks for kids	- Gym
- Pickle ball	- Dog Park	- Swimming pool
- Public Pool (like Buffalo Road) / Aquatic Center	- Athletic facilities and gaming	- Pickleball courts
- Town Swimming Pool	- Swimming pool	- Zebulon City Park with sports
		- Basketball courts

<b>Education and Training</b>		
- Public High School	- A high school	- Advice for entrepreneurs
- High school	- High school	- Education: high school
- Need more schools	- Town internships for next generation	- Access to Wake Tech/transportation
- High school	- High schools	

What do you like about Zebulon's Downtown?

<b>The Charm</b>		
- It is quaint and personable to shop owners	- It has a small-town feel, like its small enough to walk in one day.	- Old fashioned feel
- Quaint	- The charm	- Small town feel
- Consistent	- Charming	- Quaint
		- Charming
		- Quaint area

<b>The History</b>	<b>Downtown Events</b>
- History and growth	- Town events
- Historical homes and building	- Downtown night activity
- Historic	- Rock the block
- History of building	- Spring concert series
- Historic houses	- Olde Raleigh distillery's event space
- Historic architecture	- Activities and events downtown
- History	- There's been more attractions & restaurants

<b>Walkability</b>	<b>Aesthetics</b>
- Easy access	- The upkeep
- Slowly becoming more walkable	- Flower pots
- Walk and know everyone	- Clean
- Walkable	- It's gotten nicer recently
- Walkability	- Decorations, aesthetics, plants, signs
- It has a small-town feel, like its small enough to walk in one day.	- Decorations



What would make downtown better than it is today?

<b>Restaurant</b>		
- More places to eat and shop	- American restaurant/sports bar: wings, burgers, fries, fish	- More sit-down restaurants
- More restaurants	- Sit-down diverse dining: Indian, sushi	- More options: sushi, Thai, healthy
- Plant based dining options	- More restaurants	- More food healthy options
- Healthy dining options		- Options not centered on alcohols
- Coordination of food trucks (rodeo)		

<b>Improve aesthetics</b>		
- Existing businesses need to redo or improve façade. Some places look rundown	- Need more updated/current retail shops. We have a lot of industrial type shops. Need to modernize.	- Old buildings that could be restored
- Facelift!	- Spice it up/more flare	- Laurels, flowers, murals
- Make older stores clean and update	- More trees!	- Gateway or focal point (roundabout, fountain)
- Face lift		- Curb appeal/ beautification

<b>Entertainment</b>		
- More options for entertainment	- Well-developed arts district (amphitheater)	- Youth activities
- Event space (like graduation party, family reunion)	- Public music and art	- Family entertainment
	- Outdoor amphitheater	- Options not centered on alcohols
	- Skate park	- Boxcar/arcade

<b>Improve Walkability and Safety</b>		
- More sidewalks from the housing communities	- More pedestrian friendly downtown	- Bike lane and transportation to Zeb P +R
- Bypass around downtown	- Pedestrian friendly: More walkable	- Bike shop (good if we get more paths)
- Easier to get to by bike/walking: paths	- Safe walkability	- More lighting

Think about the ideas you have generated. If implemented, how might these ideas affect vulnerable and historically underserved communities?

<b>Gentrification</b>		
- They may have to move	- Growth can bring	- Gentrification, can mean
- Policies to protect underserved people from losing their house	positive/negative; some will have to re-locate	different things. Don't price people out
- There'll likely be relocation	- Increase in prices can drive people out via higher taxes	- Zoning, annexing historic district
- Property tax increase		

<b>Job Creation</b>		
- It would help provide jobs and more income opportunities	- Create jobs and activities for youth	
- Better transportation, education, and access to services and jobs would provide a higher level of life quality	- Job opportunities	
	- Increase jobs	
	- Offer jobs	

<b>Community</b>		
- Pride in the community	- With variety of all categories comes	
- A sense of community	opportunity for all and needs being met	
- Amenities will help the underserved		

How might we take steps to ensure this plan is inclusive and takes into account the perspectives, hopes, and concerns of vulnerable and historically underserved communities?

<b>Serve all communities</b>		
- Take in the variety of needs from each community	- Prioritize community amenities	- New development include incentive for vulnerable people and for those who support them (like teachers)
- Surveying the needs, wants, and desires of our diverse population	- Make sure there's good access to amenities services for vulnerable population	- Offset costs for developers and ensure those benefits continue to citizens/purchasers
- Listen to what the citizens are asking for	- Better communication with Hispanic community	- Low cost/free events
- Place development meetings in multiple communities	- offer grants to assist the communities	
- interpreter (Spanish)	- Whole family events for kids/museum	

<b>Support the underserved</b>		
- Offer free vouchers for underserved	- Sidewalks: Connect existing communities esp. minority ones	- Nice and safe subsidized housing
- Make sure there's good access to amenities services for vulnerable population	- New development include incentive for vulnerable people and for those who support them (like teachers)	- Make sure we provide transportation to activities from lower income activities in Zebulon
- Are transit stops servicing all communities and those with highest need		- Offer grants to assist the communities
- Low-income housing		

<b>Communication</b>	<b>Inclusion</b>
- Community feedback	- talk to the communities
- community newsletter/newspaper	- interpreter (Spanish)
- provide feedback from all community sessions	- Make sure there's good access to amenities services for vulnerable population
- talk to the communities	- Better communication with Hispanic community
- make yourself available for questions	- Work with school systems because they see impacts of diversity
- Better communication with Hispanic community	- Improved accessibility: disabilities
- Do these sessions in lower income areas	- Accessibility: sidewalks, handicap parking, bathrooms
- Develop better relations with populations so citizens are more willing to access and use government services (as well as know about them)	- Do these sessions in lower income areas

<b>Housing</b>		
- Habitat for humanity	- Senior housing	- Low-income housing
- Improve housing affordability	- More 55+ apartments of higher quality	- Nice and safe subsidized housing

<b>Public Transportation</b>		
- Expansion of smart ride program	- Public transportation especially for underserved	- Public transportation and walkability throughout Zebulon
- Make sure we provide transportation to activities from lower income activities in Zebulon	- Are transit stops servicing all communities and those with highest need	- Expansion of smart ride program

# COMMUNITY CAFÉ #1 SUMMARY

Monday, October 16, 2023 - 6:00 pm - 8:00 pm  
East Wake Academy – Zebulon, NC

## Executive Summary

This report summarizes the Town of Zebulon Economic Development Strategy Plan Community Café meeting on October 16, 2023. Approximately 40 people attended and enthusiastically participated in the discussion. There was unanimous agreement that Zebulon does not have the right kinds of jobs for the people who live here. Throughout the evening, participants emphasized the Town’s need for family friendly entertainment and activities, more job opportunities, and community resources.

## Evening Welcome and Overview

Shannon Johnson, Zebulon’s Economic Development Specialist, welcomed and thanked the crowd for attending. While guests ate the dinner provided by the Town, Ms. Johnson emphasized the purpose of the meeting is to hear from community members about economic development in Zebulon. A town official gave a brief overview of the economic history of Zebulon. Julie Brenman then introduced the team from Fountainworks including herself, Drew Finley, and Laura Gomez-Nichols. Ms. Brenman explained that Fountainworks is working with the Town of Zebulon to assist in forming an economic development strategic plan.



## Attendees

Participants were asked to use sticker dots to answer demographic questions. **At 70%, the vast majority of attendees live but do not work in Zebulon.**



How long have you lived in Zebulon?

Less than one year: 0

**1-4 years: 13**

More than 5 years: 6

More than 10 years: 7

What is your age?

17 or younger: 2

18-34: 1

35-44: 5

**45-64: 12**

65 or older: 7

Do you live and/or work in Zebulon?

**Live, but do not work: 19**

Work, but not live: 0

Live and work: 5

None of the above: 2

### A Tour of Zebulon

To begin the evening, the room was asked to imagine giving visitors a tour of Zebulon. Specifically, participants were asked where would you take them? What would you do? And, what do you wish you could take them to /where do you wish you could go?

Attendees provided the following responses to these questions:

- Where would you take them?
  - Carolina Mudcats
  - Little River Park
  - Schools
  - Downtown
  - Church
  - Historic District
  - Parks
  
- What would you do?
  - Dinner at Southland Steakhouse
  - McLeans
  - Fishing at Weaver's Pond
  - Devil Dog Manufacturing Corporation

- What do you wish you could take them to/where do you wish you could go?
  - Arcade
  - Little River Park Center
  - Theater – movie and dinner
  - Sit-down restaurant
  - Outdoor amphitheater
  - Event center
  - Aquatic center
  - Hotel
  - Museum



Participants were particularly eager to provide answers for what they wish they could show a visitor. These answers primarily focused on activities and entertainment. There was widespread agreement on the need for more dining options that were not fast-food.

## Group Brainstorms

The evening's attendees sat in groups at six different tables. Each table had a poster with questions in five different topic areas. Ms. Brenman asked the questions from a topic area and gave attendees 10 minutes to brainstorm ideas and record them on the poster.

The topic areas and questions were as follows:

### Business

1. If you were going to start a business in Zebulon, what are some of the factors you would consider?
2. What can the Town do to make Zebulon more attractive for entrepreneurship?
3. What businesses are not in Town that you would like to see in town? What do you have to leave Zebulon for?

### Jobs

1. Does Zebulon have the right kinds of jobs for the people who live here? Why or why not?
2. Are these jobs located where people can easily get to them?
3. Do these jobs meet the community's needs?

### Amenities

Thinking about qualities that make Zebulon a good place to work and run a business, are there amenities that should be improved such as public transportation, roads, housing, healthcare, education, entertainment etc.?

### Downtown

1. What do you like about Zebulon's downtown?
2. What would make downtown better than it is today?

### Inclusion

1. Think about the ideas you have generated. If implemented, how might these ideas affect vulnerable and historically underserved communities?
2. How might we take steps to ensure this plan is inclusive and takes into account the perspectives, hopes, and concerns of vulnerable and historically underserved communities?

**One word** to describe the ideal Zebulon economy, what would it be?

*Attendee responses to questions are transcribed on the following pages.*



*Business Question 1: If you were going to start a business in Zebulon what are some of the factors you would consider?*

Competition	Kids, teens	Hi-speed internet
<b>Location</b> (x5)	<b>Income</b>	Easy access to highway
Other businesses	Demographics	Water and sewer capacity
Cost of buildings, rent, utilities	Clientele	Amenities
Cost of upfit	<b>Median Income</b> (x2)	Hotels
Real Estate Cost (Lease)	Diversity	Educational opportunities
An anchor business	Infrastructure (x2)	Perks
Available Real Estate	Condition of buildings	Code
Population	<b>Traffic</b> (x3)	Town ordinance
Age of residents	Need for the area what citizens want and need	Can the town be a resource for me as a new business owner
Foot traffic		

*Business Question 2: What can the Town do to make Zebulon more attractive for entrepreneurship?*

Streamlined business approval process	Actively seek out businesses to come here
Location that attracts people	Not fast food, no gas stations, we need sit down restaurants and retail shops
Foot traffic visibility	Offer tax incentives
Incentives	Promote growth
Pre-built retail park	Citizens ask other businesses we like to move to Zebulon
Reduce cost to buy/rent buildings	Be more tolerable of entrepreneurship
Less difficulty getting permits – takes too long to open up new businesses	Be business friendly
Perks/discounts	Intensify incentive commercial growth efforts
Tax breaks	Traffic
Technical Assistance	Don't go thru downtown for everything
Solicit specific and targeted businesses	Grants
Targeted for wake tech students	Entrepreneurship Programs (training)

*Business Question 3: What businesses are not in Town that you would like to see in town? What do you have to leave Zebulon for?*

Pharmacy (CVS)	Other grocery stores (Publix)	Box store
Incubator	Gift shop	Chick-Fil-A
Family Fun Entertainment	Chick fil A	Bed'n'Breakfast
Bowling	Lowe's	Bowling Alley
Skating	Sit down restaurants (sushi/hibachi, American regional ex Chilis TGIF, fresh sandwiches and soup)	Skating Rink
Movies	Bike shop or athletic type store	Seafood Restaurant
Fitness Center	Restaurants	Planet Fitness
Aldi	More children events	Beauty Supply Store
Upscale Grocery Store (x2)	Better and connected sidewalks	Entertainment family friendly
Food (not fast food)	Destinations	Sporting goods shop
Evening entertainment	Shop businesses	Entertainment area near mudcats stadium
Variation of specialty stores	Medical facilities	Bicycle shops
Ice cream shop	Hotel	Youth activity / parks
More retail shops (clothing, housewares)	Carwash	

*Jobs Question 1: Does Zebulon have the right kinds of jobs for the people who live here? Why or why not?*

The unanimous answer was no. The following comments were included:

- The businesses aren't here
- No jobs to speak of
- Most jobs going to Raleigh
- Mfr jobs are not doing it today
- Job fit here at time – but not now
- Too many people moving here. A lot of different skill sets, different salary expectations. Need more variety.
- Not right kind of jobs for new demographic
- Need
  - o Ofc/sales jobs
  - o Blue collar jobs
- We don't have the jobs to increase median income.

- Poor retail structure.
- We need more industry and bigger companies to pay better salaries.
- Incentivize commercial development in entertainment area.
- Need IT jobs and biotech jobs.
- Increase fiber connection
- Develop existing non-profits
- Career development
- Entrepreneurship development
- Resources
- Human resources jobs
- Public health/public service
- More daycare
- Planning/zoning
- Expand government staff in Zebulon
- Everything is located in Raleigh
- Need more higher paying jobs
- New industrial park?
- Leverage wake tech

*Jobs Question 2: Are these jobs located where people can easily get to them?*

**Five of the six groups said no.** The remaining group said, “Yes, for now – but we need to improve infrastructure to keep up with traffic.” The following comments were also included:

- They are in other towns not easily accessible for folk without transport
- What is here is easy to get to
- Add a traffic circle
- If Wake tech is training for these areas: EMT, fire, policeman, biotechnology, design and engineering
  - o Be prepared to take advantage of these skills
- More jobs at the edge of town would be easier to get to
- You can't access what's not here.
- Road improvements
- Not here
- We travel to Raleigh, Wilson, etc.

*Jobs Question 3: Do these jobs meet the community's needs?*

**Five of the six groups said no.** The remaining group said, “Yes, we need all these jobs.” The following comments were also included:

- We need more variety of businesses. More medium sized and maybe a few more large ones like GSK and JSF
- Currently, no.
- Need to employ residents in Zebulon
- The jobs we have do not meet the community needs.

- The jobs we want need to be targeted to higher pay.
- Funding for new business establishment
- What makes the community appealing
- Need higher paying jobs without commuting

*Amenities: Thinking about qualities that make Zebulon a good place to work and run a business, are there amenities that should be improved such as public transportation, roads, housing, healthcare, education, entertainment etc.?*

Banquet center	Pickle ball	Museum
Roller-skating/skateboarding facility	Public Pool (like Buffalo Road) / Aquatic Center	Community awareness of public services (GoWake)
Bowling Alley	Gaming facility for kids	Hospital
Movie Theater	Transit System	Restaurants
Event Center	Website, social media	Social Media
More retail shopping	Hotels	Zebulon community app
Hospital	Smallish convention center	Events center
Public High School	Need more schools	Add signage to direct
Do not need so many low-end stores (Dollar General, Dollar Tree, Family Dollar)	Need affordable housing, not so many big houses. Need townhome, apartments, 50+ living. More options!	Improve roads to help alleviate traffic congestion with all the new houses built and people moving in
Lodging	Walking trail 3 to 5 miles	Expand/wide roads
Need stores for a middle class	Get places without car	Town Swimming Pool
Pools, splash pads, parks for kids	Regional medical park	Dog Park
Dry cleaners	Keep GoWake SmartRide	Movie Theater
Better connections to Raleigh and Durham	Places to take clients → restaurants, etc.	Need more evening fitness classes
Concert venue	Commercial retail park	Athletic facilities and gaming
Family friendly entertainment	Large scale event center	Concerts
High school	Food hall	Bars
HOA taking ownership sooner	Downtown boutique shops	Something to do without leaving town
More healthcare	Art store	Transportation to Wake Tech
Adult entertainment (diner and theatre)	Services for elderly/disabled (transportation)	Wake County Bus Collector (Wake Tech as a hub)
Hotel	Drive-thru coffee shop	Healthcare Wendell Falls

Place for kids and teens entertainment for family (arcade, bowling alley, etc.)	Movie theater in Wedgewood (Carlic) shopping center	More shopping and sit-down restaurant choices downtown
Bus station – mass transit		

*Downtown Question 1: What do you like about Zebulon's downtown?*

The upkeep	Consistent
Easy access	The charm
Quaint	Zebulon Community center
It is quaint and personable to shop owners	Town events
We like that it is being revitalized, but we need more shops and restaurants downtown	Location
It has a small-town feel, like its small enough to walk in one day.	Clean
Flower pots	Downtown nigh activity
Old fashioned feel	Quaint area
Slowly becoming more walkable	Rock the block
Friendly shop owners	Spring concert series
Friendliness, but feels old and outdated	

*Downtown Question 2: What would make downtown better than it is today?*

More places to eat and shop	Pet grooming
Hours for working families	Expansion/updates of Comm Center
Youth activities	Facelift!
All-inclusive businesses (eat, work, shop, entertain in 1)	New businesses
Family entertainment	Gateway or focal point (roundabout, fountain)
Variety of business	Make older stores clean and update
Upscale business	More parking (event)
Expand downtown district	More options for entertainment
Road bypass for big trucks to keep them from driving through downtown	Senior center – town presence – main street

More lighting	Spice it up/more flare
Need more updated/current retail shops. We have a lot of industrial type shops. Need to modernize.	Existing businesses need to redo or improve façade. Some places look rundown
More sidewalks from the housing communities	Decrease truck traffic
More/bigger parking places/options for downtown events	Well-developed arts district (amphitheater)
More consistent business hours	More pedestrian friendly downtown
Bypass around downtown	Public music and art
Business friendly town government	Public patio seating

*Inclusion Question 1: Think about the ideas you have generated. If implemented, how might these ideas affect vulnerable and historically underserved communities?*

- Resources for all income levels and ages
- Pride in the community
- Bridging the gaps in our community
- A sense of community
- Create jobs and activities for youth
- It would help provide jobs and more income opportunities
- With variety of all categories comes opportunity for all and needs being met
- We need to maintain a balance between old and new. We don't want to become a "mini-Raleigh" or "mini-Knightdale". We want businesses that are unique to Zebulon and bring other people here from other towns.
- Better transportation, education, and access to services and jobs would provide a higher level of life quality
- Job opportunities
- Educational resources
- Zebulon's black history recognition
- They may have to move
- Increase jobs
- Policies to protect underserved people from losing their house
- Property tax increase

*Inclusion Question 2: How might we take steps to ensure this plan is inclusive and takes into account the perspectives, hopes and concerns of vulnerable and historically underserved communities?*

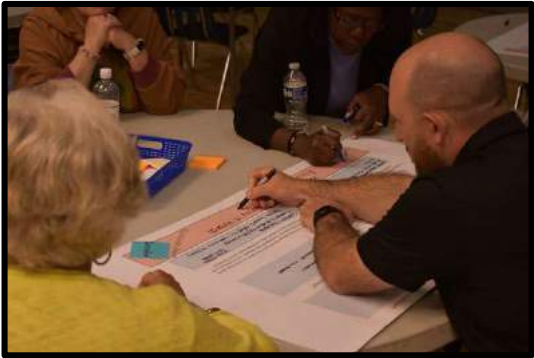
- Take in the variety of needs from each community
- Surveying the needs, wants, and desires of our diverse population
- Do not discard the things that the town does well. However all new ideas.
- Recognize the growth of the new while still considering long term residents
- Preserve the present culture and add updates for new residents
- Listen to what the citizens are asking for
- Preserve the characteristics and personality of town, while maintaining steady growth.
- Not making all land available to developers
- Place development meetings in multiple communities

- We need to keep our “small town vibe” and not totally replace everything we have already
- Community feedback
- community newsletter/newspaper
- provide feedback from all community sessions
- more action, not words
- Improve parks and recreation
- offer free vouchers for underserved
- offer grants to assist the communities
- talk to the communities
- make yourself available for questions
- interpreter (Spanish)
- Habitat for humanity
- Improve housing affordability



*One word to describe the ideal Zebulon economy, what would it be?*

- Care more about the people and their needs than money
- Thriving (x2)
- Flourishing
- Community-fueled
- Action
- Vibrant
- Diversity
- Adaptable
- Growing (x3)
- Diverse (x2)
- Growth (x2)
- Action
- Services
- Income
- Recession-proof
- Diversified
- Fluid
- More-Competitive
- Competitive
- Feasible
- Leadership
- Beneficial





## Top Two Ideas For Improving Zebulon's Economy

Each of the six groups was asked to pick the top two ideas their group came up with. These top ideas were written down and placed at the front of the room. Participants were then each given two sticker dots to place next to their favorite two ideas. The following ideas in order of popularity were:

- Affordable family friendly entertainment (15 dots)
- Youth engage/involve consideration (10 dots)
- Draw more business in the appropriate areas (7 dots)
- Capitalizing on Benefits of Wake Tech (7 dots)
- Employ (businesses) residents locally (7 dots)
  - o Bring in businesses
  - o Leads to jobs support community
- Increase amenities for communities. This will benefit businesses, citizens, and economy. Keep money here and bring money here. (5 dots)
  - o Retail shops, restaurants, entertainment, arts, cultural centers
- Infrastructure (4 dots)
  - o Roads, utilities, etc.
- Higher paying jobs (3 dots)
- Retail and Jobs (3 dots)
- Zebulon Community App (2 dots)
- Diversity (1 dot)
- Median Income

## Wrap Up

Ms. Johnson thanked the crowd and reiterated the Town's desire to see action and not just a plan. She explained that between April and June of 2024 a plan will come before the Board of Commissioners. Ms. Brenman then wrapped up the session by thanking everyone for their participation. She also reminded the group that there will be two more community cafes following the same structure as this session, one on October 25 and the other on November 9.

# COMMUNITY CAFÉ #2 SUMMARY

Monday, October 25, 2023  
5:30 pm – 7:30 pm

Zebulon United Methodist Church  
121 W. Gannon Avenue  
Zebulon, NC

## Executive Summary

This report summarizes the Town of Zebulon Economic Development Strategy Plan Community Café meeting on October 25, 2023. Approximately 12 people attended and participated in the discussion, including several repeat participants from the first Community Café. There was unanimous agreement that Zebulon does not have the right kinds of jobs for the people who live here.

## Evening Welcome and Overview

Michael Clark, Zebulon’s Planning Director, welcomed and thanked the crowd for attending. While guests ate the dinner provided by the Town, Mr. Clark explained these meetings are meant to better understand the needs and desires of citizens. He went on to say the input provided by citizens will become the blueprint for the economic development division to guide development plans and land use decisions. Joe Moore, Zebulon Town Manager, then gave a brief overview of the economic history of Zebulon. He emphasized the Town’s desire to bring in businesses that will serve the citizens and community. Julie Brenman then introduced the team from Fountainworks including herself, Maddie Shea, and Laura Gomez-Nichols. Ms. Brenman explained that Fountainworks is working with the Town of Zebulon to assist in forming an economic development strategic plan.

## Evening’s Agenda

Ms. Brenman went over the agenda for the evening:

1. Welcome and Overview of Café Purpose
2. A Tour of Zebulon
3. Your Thoughts on Zebulon’s Economy, Business, Jobs, Amenities, and Downtown
4. Fostering an Inclusive Zebulon Economy
5. Top 2 Ideas – Improving Zebulon’s Economy
6. Wrap Up

Ms. Brenman went on to explain to the participants that this event is not about testifying in front of officials. Rather, the evening is about having a conversation and sharing ideas. She then broke participants into two groups of roughly six people each.

## Attendees

Participants were asked to use sticker dots to answer demographic questions.

**83%** of participants have lived in Zebulon for more than 10 years.

How long have you lived in Zebulon?				
Less than 1 Year	1-4 Years	More than 5 years	More than 10 years	Total
-	1	1	10	12

**75%** of participants were 65 or older.

What is your age?					
17 or younger	18-34	35-44	45-64	65 or older	Total
-	1	-	3	8	12

**50%** of participants live and work in Zebulon

Do you live and/or work in Zebulon?			
Live, but not work	Work, but not live	Live and work	Total
4	2	6	12



## A Tour of Zebulon

To begin the evening, the room was asked to imagine giving visitors a tour of Zebulon. Specifically, participants were asked where would you take them? What would you do? And, what do you wish you could take them to /where do you wish you could go?

Attendees provided the following responses to these questions:

Where would you take them?

- Downtown: feel Zebulon what's going on
- Food lion shopping center, where there are some restaurants
- Mudcat Stadium
- Little River Park
- Whitley Park
- Zebulon Community Park
- Historic School / Town Hall
- Historic Neighborhood and Homes
- Art Murals Sculptures Downtown

What would you do?

- Industrial Park
  - o US Foods, Phlexo
- Cup of coffee at Creative Cup
- Root Bound – Plant Store
- McLean's
- Old Raleigh Distillery
- Southland Steakhouse
- Fall Line – a bar
- Fishing/ bodies of water

What do you wish you could take them to/where do you wish you could go?

- Bowling
- More restaurants
- Rec football for kids
- Movie
- Kids activities
- More bike paths

## Group Brainstorms

The evening's attendees sat in groups at two different tables. Each table had a poster with questions in five different topic areas. Ms. Brenman asked the questions from a topic area and gave attendees 10 minutes to brainstorm ideas and record them on the poster. Ms. Shea and Ms. Gomez-Nichols each sat with one of the tables and helped transcribe their responses.

The topic areas and questions were as follows:

### Business

4. If you were going to start a business in Zebulon, what are some of the factors you would consider?
5. What can the Town do to make Zebulon more attractive for entrepreneurship?
6. What businesses are not in Town that you would like to see in town? What do you have to leave Zebulon for?

### Jobs

4. Does Zebulon have the right kinds of jobs for the people who live here? Why or why not?
5. Are these jobs located where people can easily get to them?
6. Do these jobs meet the community's needs?

### Amenities

Thinking about qualities that make Zebulon a good place to work and run a business, are there amenities that should be improved such as public transportation, roads, housing, healthcare, education, entertainment etc.?

### Downtown

3. What do you like about Zebulon's downtown?
4. What would make downtown better than it is today?

### Inclusion

3. Think about the ideas you have generated. If implemented, how might these ideas affect vulnerable and historically underserved communities?
4. How might we take steps to ensure this plan is inclusive and takes into account the perspectives, hopes, and concerns of vulnerable and historically underserved communities?

**One word** to describe the ideal Zebulon economy, what would it be?

*Attendee responses to questions are transcribed on the following pages.*

*Business Question 1: If you were going to start a business in Zebulon what are some of the factors you would consider?*

- Foot traffic downtown
- Location
- Water & Sewer
- Age of Demographic
- Education required
- Income of demographic
- Accessibility (parking)
- Education of Work force
- Water Supply/Sewer
- Traffic Flow
- Workforce
- Infrastructure utilities
- Possible location
- Capital/financial
- Find out where the land use
- Business plan
- Approval process
- Any fees or licenses
- Partners in community

*Business Question 2: What can the Town do to make Zebulon more attractive for entrepreneurship?*

- Demographic snapshot
  - o Being able to answer questions
- Quality of life
- Curb appeal
- Schools, churches, programs for children
  - o Quality of life
- Educational outreach/mentor
- Accessible resources
- Better relationship with Raleigh and County
- Streamlining the process
- Bring building permits within town departments
- Remove roadblocks
- One person government liaison (one-stop shop)

*Business Question 3: What businesses are not in Town that you would like to see in Town?*

- Butcher
- Baseball-related
  - o (Mudcats spin-off?)
- Jewelry, shoe, watch repair
- Restaurants
- Gift shop
- Men's and women's clothing
- Bakery

- Ice cream
- Experience/customer service is different than buying online
- Spa
- Grocery stores
- Theater/event center
- Entertainment options
- Activities for kids, esp. teens
- Pool
- Arcade
- YMCA
- Gym/exercise/athletic club

At the end of the 10 minutes, Ms. Brenman then asked the room if there were any ideas from the discussion they would like to share. The following answers were given:

- Location and availability of water and sewer important to consider when starting a business
- Approvals for a business, needing to go to the county – nice to have the permitting more streamlined or having a government support person to help in the permitting process
- The need for entertainment options and grocery stores
- Activities for teenagers!

*Jobs Question 1: Does Zebulon have the right kinds of jobs for the people who live here? Why or why not?*

**The unanimous answer was no.** The following comments were included:

- There is a good variety, but not enough and not enough higher paying.
- No.
- Anywhere but here.
- Jobs aren't high paying enough for people to live here
- Need more companies that pay well
- Have some job possibilities, but not a trained work-force
- If Wake Co. land would be available to us
- Internet access and quality needs to improve

*Jobs Question 2: Are these jobs located where people can easily get to them?*

- Not really
- Lots commute to Raleigh, Rocky Mount, Wilson
- Remote work can live anywhere
- More jobs want people in person
- Transport network dictates what is easy to get to
- Some people like working in Raleigh and living here
- Jobs are in Wilson, Raleigh, and Rocky Mount
- Zebulon is safe, offers homes to people working outside the town

*Jobs Question 3: Do these jobs meet the community's needs?*

- Need higher paying jobs
- Broadband access, fiber
- On-the-job training
- Wake tech can help with training

- We don't have land for big industrial park
- Don't want to target a single industry
- More teachers
- We don't have the jobs. We want more

At the end of the 10 minutes, Ms. Brenman again asked the room if there were any ideas or key take aways from the discussion they would like to share. The following answers were given:

- We think we have enough water and sewer here
- No good internet service
- People are in Zebulon because of the location, but jobs are outside
- Not a lot of industrial land to bring a big employer
- Don't want to target just a single industry want a variety of jobs → infrastructure!
- Lot of advantages to Wake Tech locating here
  - o Jobs available to work there
- Transportation!

*Amenities: Thinking about qualities that make Zebulon a good place to work and run a business, are there amenities that should be improved such as public transportation, roads, housing, healthcare, education, entertainment etc.?*

- Bus/transportation
- Youth center
- Museum
- Historic building rehabilitation?/preservation
- All of the above!
- Parking
- Healthcare
- Physical therapy
  - o 1 for 10,000 people
- Water and sewer
- Improved roads
- Event/civic center
- High school
- Improved roads
- Have to leave Zebulon for lots
- Staff w/real estate knowledge → preservation
- Daycare
- Need more public transit
- Internet everywhere
- Medical park
- Upper tier housing
- After school care, esp. kids with special needs
- Rapid transit line for bussing
- Accounting services
- More diversity in housing
  - o Attainable
  - o Affordable
  - o Temporary



- Workforce housing
- Multifamily housing
- Emergency housing and other emergency services
- Improved smart ride
- Pharmacies
- Accessory Dwelling Units, make people aware
- A high school
- All of the above
- Address traffic in town and out of town
- Family doctors
- Amphitheater
- Local attorneys

At the end of the ten minutes, participants emphasized the following topics from their discussion:

- Health care! Big time.
- Public transit services
- Daycare
- High School

*Downtown Question 1: What do you like about Zebulon's downtown?*

- It's gotten nicer recently
- Famous attractions
  - o Old Raleigh Distillery
  - o Bagpipe place
- There's been more attractions and restaurants
- Unique businesses
- Decorations, aesthetics, plants, signs
- Walk and know everyone
- walkable

*Downtown Question 2: What would make downtown better than it is today?*

- Adequate parking
- "downtown" buildings
- Curb appeal/beautification
- Parks need updating
- Market



- Slower truck traffic

- Longevity of individual businesses
- Clear demarcation
- Rotate downtown parties: Vance Street
- Consistency of business hours
- Taxis, safe rides
- Places to live
  - o Mixed use zoning and structures
- Open space to gather
- Wi-fi! Hardwired fiber
- Outdoor amphitheater
- Pedestrian friendly
  - o More walkable
- Landscape architecture
- Less big-truck friendly
- Green/eco-friendly
- More trees!

Participants wanted to emphasize the following key take aways from the downtown discussion:

- Walkable
- Everyone knows each other
- Need places to live
- Make it more pedestrian friendly
- More environmentally friendly
- More and better beautification
- Better parking
- Slow the trucks down!

*Inclusion Question 1: Think about the ideas you have generated. If implemented, how might these ideas affect vulnerable and historically underserved communities?*

- Amenities will help the underserved
- There'll likely be relocation
- Growth can bring positive/negative; some will have to re-locate
- Buildings/land may change; things knocked down and rebuilt
- Increase in prices can drive people out via higher taxes
- Gentrification, can mean different things. Don't price people out

*Inclusion Question 2: How might we take steps to ensure this plan is inclusive and takes into account the perspectives, hopes and concerns of vulnerable and historically underserved communities?*

- Prioritize community amenities
- Make sure there's good access to amenities services for vulnerable population
- Sidewalks:
  - o Connect existing communities esp. minority ones
- Senior housing
- Expansion of smart ride program
- Better communication with Hispanic community
- More 55+ apartments of higher quality
- Work with school systems bc they see impacts of diversity
- Bring quality educations and support them

- New development include incentive for vulnerable people and for those who support them (like teachers)
- Offset costs for developers and ensure those benefits continue to citizens/purchasers
- Develop better relations with populations so citizens are more willing to access and use government services (as well as know about them)
- Are transit stops servicing all communities and those with highest need
- Resource liaison
- Improved accessibility
  - o disabilities

Attendees emphasized the following discussion topics:

- Better communication with Hispanic community
- Better accessibility in downtown
- Transit stops to serve high need communities
- Sidewalks
- Senior center
- Youth center



*One word to describe the ideal Zebulon economy, what would it be?*

- Opportunity
- Nurturing
- Thriving
- Thriving
- Connected
- Prosperous
- Innovative
- Community: united
- Growth

### Top Two Ideas For Improving Zebulon's Economy

Both groups were asked to pick the top two ideas their group came up with. These top ideas were written down and placed at the front of the room. Participants were then each given two sticker dots to place next to their favorite two ideas. The following ideas in order of popularity were:

- **Economic Development (5 dots)**
  - o More businesses and higher paying jobs
  - o Supersite building
  - o More educated workforce
- **Workforce: job opportunities for residents that reside here (3 dots)**
- **Infrastructure & Utilities (2 dots)**
- **Grocery Store Options/locations (2 dots)**
- **Transportation (2 dots)**
- **Infrastructure (1 dot)**
  - o Water and Sewer
  - o Access to infrastructure



### Wrap Up

Ms. Brenman told the room that meeting the community's needs is the most important part of the economic development process. She explained that is why these community engagement meetings are one of the first steps. Mr. Clark then explained that the Town and economic development team does not enter the process with preconceived notions, because this process is citizen driven. He emphasized the importance of the community's vision and reminded the room of the multiple upcoming community engagement meetings, including one on land use.

The room was thanked for their time and participation and reminded that the last Community Café will be held in the same location on November 9.

# COMMUNITY CAFÉ #3 SUMMARY

Thursday, November 9, 2023  
Zebulon United Methodist Church  
5:30 pm – 7:30 pm  
121 W. Gannon Avenue

## Executive Summary

This report summarizes the Town of Zebulon Economic Development Strategy Plan Community Café meeting on November 9, 2023. It was the third and final community engagement event for this stage of the planning process. Approximately 35 people attended and participated in the discussion, including several repeat participants from the first and second Community Cafés.

## Evening Welcome and Overview

Joe Moore, Zebulon Town Manager, welcomed and thanked the crowd for attending. While guests ate the dinner provided by the Town, Mr. Clark explained the basic concepts of economic development and community engagement. He then gave a brief overview of the economic history of Zebulon. Shannon Johnson, Zebulon's Economic Development Specialist, then spoke to the evening's participants and thanked them for joining. She said economic development is often done by speaking directly to business and industry, but that this approach does not fit Zebulon's high-growth pattern nor the Town's desire to provide community stability. Ms. Johnson assured the crowd that this process would not create a plan without action. She explained the next steps in the strategic planning process after this round of community engagement cafés focused on creating an industry working group and creating a draft economic development plan. After the draft plan is written, the community will be reconvened for another round of feedback. She emphasized that this process, with its iterative community engagement built in, has been developed to truly include and engage residents.

Warren Miller then introduced the team from Fountainworks including himself, Maddie Shea, and Laura Gomez-Nichols. Mr. Warren explained that Fountainworks is working with the Town of Zebulon to assist in forming an economic development strategic plan and tonight is specifically working to get community input for and help to develop the Town's economic development plan.

## Evening's Agenda

Mr. Miller went over the agenda for the evening:

7. Welcome and Overview of Café Purpose
8. A Tour of Zebulon
9. Your Thoughts on Zebulon's Economy, Business, Jobs, Amenities, and Downtown
10. Fostering an Inclusive Zebulon Economy
11. Top 2 Ideas – Improving Zebulon's Economy
12. Wrap Up

Mr. Miller explained it is okay if not everyone agrees with every idea presented. He said what is important is that everyone share their ideas.

Participants were in four groups of roughly six people in each group, with some participants leaving early and some arriving late.

## Attendees

Participants were asked to use sticker dots to answer demographic questions.

**55%** of participants have lived in Zebulon for one to four years.

How long have you lived in Zebulon?	
Less than 1 Year	3
1-4 Years	23
More than 5 years	-
More than 10 years	7
Total	22

**61%** of participants were 45 or older.

What is your age?	
17 or younger	-
18-34	4
35-44	5
45-64	7
65 or older	7
Total	23

**68%** of participants live but do not work in Zebulon.

Do you live and/or work in Zebulon?	
Live, but not work	15
Work, but not live	3
Live and work	4



## A Tour of Zebulon

To begin the evening, the room was asked to imagine giving visitors a tour of Zebulon. Attendees provided the following responses to these questions:

Where would you take your visitors?

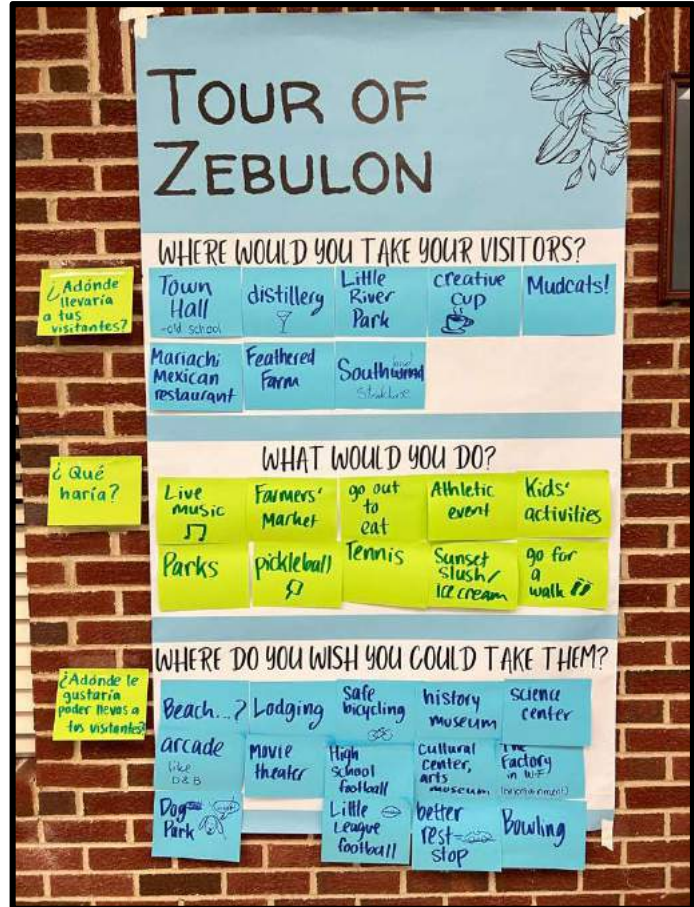
- Town Hall
- Distillery
- Downtown
- Little River Park
- Creative Cup
- Mudcats
- Mariachi Mexican Restaurant
- The Feathered Farm
- Southland Steakhouse

What would you do?

- Go out to eat
- Go to an athletic event
- Live Music
- Farmers' Markets
- Something for the kids
- For a walk
- To the park
- Tennis and/or Pickleball
- Ice cream place: Sunset Slush

Where do you wish you could take them?

- The beach
- Lodging
- Safe bicycling
- Science Center
- Cultural Center
- Arts Museum
- History Museum
- Arcade
- Movie Theatre
- Bowling
- Event Center
- Greenway for walks
- High school football game
- Little League Football
- Like the Factory in Wake Forest, recreational and restaurant – entertainment venue
- Dog park



## Group Brainstorms

Each group had a poster with questions in five different topic areas. Mr. Miller asked the questions from one topic area at a time and gave attendees 10 minutes to brainstorm ideas and record them on the poster. Ms. Shea and Ms. Gomez-Nichols helped transcribe their responses.

The topic areas and questions were as follows:

### Business

7. If you were going to start a business in Zebulon, what are some of the factors you would consider?
8. What can the Town do to make Zebulon more attractive for entrepreneurship?
9. What businesses are not in Town that you would like to see in town? What do you have to leave Zebulon for?

### Jobs

7. Does Zebulon have the right kinds of jobs for the people who live here? Why or why not?
8. Are these jobs located where people can easily get to them?
9. Do these jobs meet the community's needs?

### Amenities

Thinking about qualities that make Zebulon a good place to work and run a business, are there amenities that should be improved such as public transportation, roads, housing, healthcare, education, entertainment etc.?

### Downtown

5. What do you like about Zebulon's downtown?
6. What would make downtown better than it is today?

### Inclusion

5. Think about the ideas you have generated. If implemented, how might these ideas affect vulnerable and historically underserved communities?
6. How might we take steps to ensure this plan is inclusive and takes into account the perspectives, hopes, and concerns of vulnerable and historically underserved communities?

**One word** to describe the ideal Zebulon economy, what would it be?

*Attendee responses to questions are transcribed on the following pages.*





- Locations
- Entertainment
- Value to community

*Business Question 2: What can the Town do to make Zebulon more attractive for entrepreneurship?*

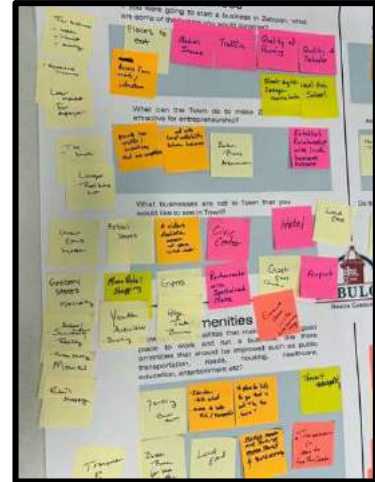
- Infrastructure
- Liaison through process
- Mentor
- Ease of Access
- Grants
- Improve street congestion
- Offer grants through SBA
- Meet ups and activities for feedback
- Make building rentals easier to find
- Better parking
- Update shopping centers (attractive)
- Community involvement
- A water park
- Offer grants or subsidies: promote better
- Shared small vendor marketplace for small businesses (share overhead together)
- Marketing available business incentives, buildings, and vendor opportunities
- Entrepreneurship ecosystem development
- Programs for teens: mentoring programs
- Hospital or ER
- Tech options
- Product design
- Stem opportunities
- Tax breaker
- Larger residential host
- Provide tax credits/incentives that are competitive
- Easy and safe walkability between businesses
- Better road infrastructure
- Establish relationship with local business owners
- Strategically placed dog park
- Support in permits
- Advertise
- Communication
- Program like Raleigh’s NC-score targeted to Zebulon
- Mentorship programs for entrepreneurs
- Marketing/promotions of new businesses



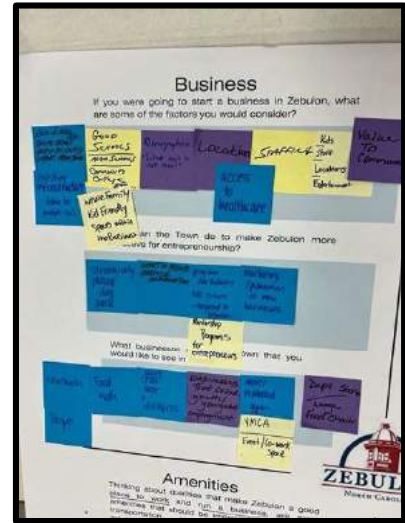
*Business Question 3: What businesses are not in Town that you would like to see in Town?*

- Dentist

- Bakery
- Restaurants
- Hotels
- Supermarkets
- Fed Ex store
- Roller Skating for kids
- Hotels
- Entertainment for families
- Youth/teen centers
- Sit down restaurants
- Thai restaurant
- Better sit-down restaurants
- Gym
- Movies
- Lidl or Aldi
- Moe
- Hibachi
- Bowling
- Better daycares
- Plant based options
- Healthy options
- Vegan/Plant based restaurants
- Sit down restaurants
- Swimming school
- More retail in downtown
- Venue/event room
- YMCA
- Teen center
- Hotel(s)
- Diverse restaurant options and sit-down restaurants
- Wellness center and gym
- Craft cocktail lounge with live music (diverse) and nightlife
- Closer EMS system
- Retail stores
- A visitor's destination: museum, art space science center
- Civic center
- Hotel
- Local EMS
- Grocery stores: specialty
- More retail shopping



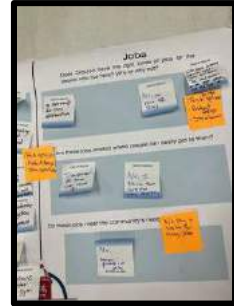
- Gyms
- Restaurants with specialized menu
- Craft shoe center
- Airport
- Indoor/outdoor swimming facility
- Youth activities: bowling
- High tech business
- Concert area inside
- Roller skating
- Movies
- Retail shopping
- Starbucks
- Target
- Food Halls
- More craft beer and distilleries
- Businesses that offer youth/young adult employment
- More/expanded gym
- YMCA
- Event/co-work space
- Department stores
- Large food chain



*Jobs Question 1: Does Zebulon have the right kinds of jobs for the people who live here? Why or why not?*

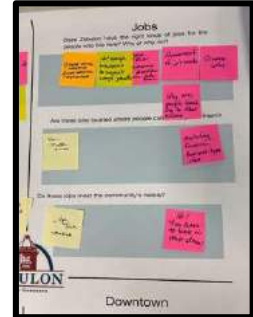
- No
- We are just houses
- Not for the income
- Highways
- Not jobs for teens
- No – not higher paying jobs
- No. not enough full-time opportunities
- No, we need HR jobs
- With more business growth, more jobs will come. The need seems to be more options, not the type of...
- Tech options
- Product design
- Stem careers
- No med
- More service industries
- More attractive neighborhoods
- Not enough business to support large growth
- Assessment of job needs
- Diverse jobs
- Why are people traveling to other towns

- Need more businesses provide more jobs
- It depends: don't expect some to be here
- Jobs may not meet qualifications
- Lots of entry-level but not middle management/ability to grow
- Internship/apprenticeship
- Tech manufacturing
- Product design



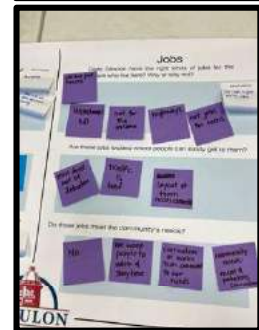
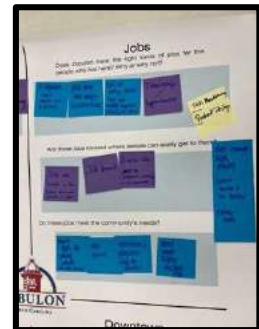
*Jobs Question 2: Are these jobs located where people can easily get to them?*

- Most drive out of Zebulon
- Traffic is bad
- Layout of town needs connected
- Transportation for those who need it
- No, I think that you need more advertising
- No, traffic a mess
- Marketing, finance, business type jobs
- Jobs are located in the same area... spread it out
- Job board
- Diverse jobs (different working environments)
- Not enough high paying
- Can't make it on \$9/hr
- Entry-level



*Jobs Question 3: Do these jobs meet the community's needs?*

- No
- We want people to work and stay here
- Curriculum of Wake Tech connected to our needs
- Community needs: meat & potatoes (like restaurants)
- No, more professional jobs
- No, pay is too low for many jobs
- High tech
- Medical
- No! They leave to work in other places!
- More opportunities for young adults: the groc, target
- Not quite
- Internship program/opportunity for growth
- Need more higher income jobs

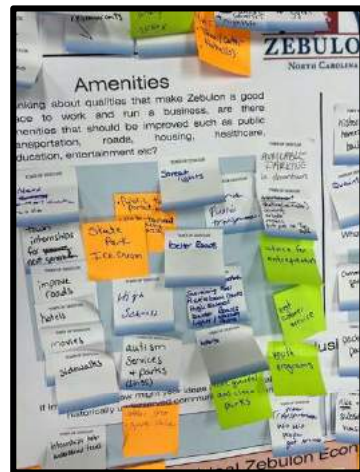


At the end of the 10 minutes, Mr. Miller asked the room if there were any ideas or key take aways from the discussion they would like to share. The following answers were given:

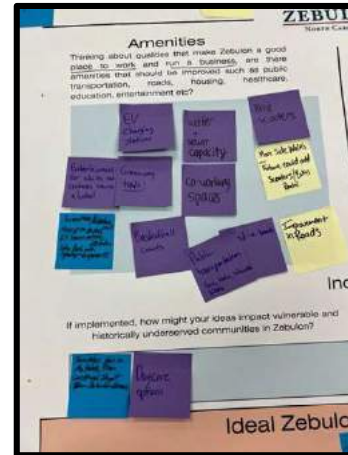
- Tech manufacturing
- Medical
- Product design
- Cultural events
- Instead of big industry, community needs

*Amenities: Thinking about qualities that make Zebulon a good place to work and run a business, are there amenities that should be improved such as public transportation, roads, housing, healthcare, education, entertainment etc.?*

- Mental health care
- Mark areas of town
- Orthodontics and dentists
- High speed internet
- Transportation buses
- More healthcare with longer open hours
- Family activities
- Swimming pool
- Places to shop
- Senior housing
- Bus service
- Round about instead of 4 way stops
- Hospital
- Bike lanes
- Nice grocery store
- Handicap accessibility
- Wake med
- Historical center
- Gym
- Home health care agency
- Sidewalks to connect to each other for bikes/walker
- High school
- Greenway trails to connect to downtown
- Childcare
- Need entertainment, movie
- Town internships for next generation
- Improve roads
- Hotels
- Movies
- Sidewalks
- Skate park
- Ice cream
- Public transportation
- Entertainment
- High schools
- Autism services and parks (1 in 35)
- Street lights
- Improve public transportation
- Better roads
- Parking downtown
- Swimming pool
- Pickleball courts
- High school
- Better roads

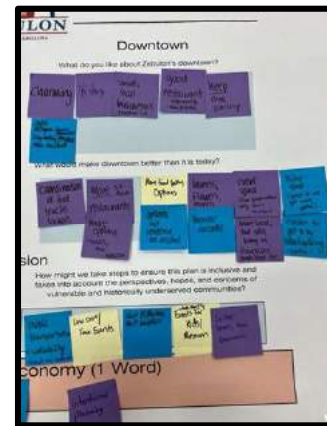


- Better lights
- Better walking paths
- Hotels
- Available parking in downtown
- Entertainment: skating (ice and roller), bowling, arcade, movies, putt putt, or top golf
- Advice for entrepreneurs
- Best customer service
- Youth programs
- More guarded and clean parks
- Education: high school
- Access to Wake Tech/transportation
- A place for kids to go that is not "by the bars"
- Transit / transportation
- Transportation of elderly
- Better roads for less traffic
- Local EMS
- Better roads and parking
- Better parks and youth activities
- Transportation for teens to rec center
- Newspaper
- Better communication
- Inside concert auditorium venue
- Doctors
- Physical therapy
- Health care, medicine
- EV charging stations
- Water + sewer capacity
- Bird scooters
- Entertainment for adults not centered around alcohol
- Greenway trails
- Co-working spaces
- More sidewalks: future could add scooters/bike rentals
- Recreation/Entertainment
- Access to (better) 64 from outside
- Zebulon City Park with sports
- Basketball courts
- Public transportation: bus, train, sidewalks, bikes
- Round-a-bouts
- Improvement in roads



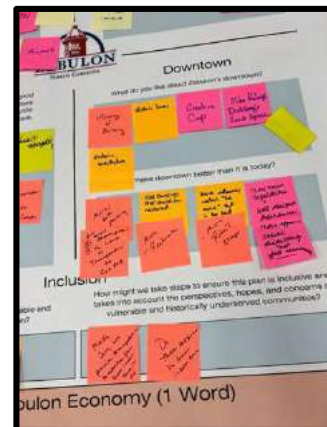
*Downtown Question 1: What do you like about Zebulon's downtown?*

- Creative Cup
- Charming
- Activities and events downtown
- Walkability
- Small business
- Centralized
- Small town feel
- Decorations
- History and growth
- Historical homes and building
- Quaint
- Historic
- Skate park
- Creative cup
- Plant store
- History of building
- Historic houses
- Creative cup
- Olde Raleigh distillery's event space
- Historic architecture
- Charming
- History
- Small, local businesses
- Creative cup
- Good restaurants: high quality, farm to table
- Keep free parking



*Downtown Question 2: What would make downtown better than it is today?*

- Face lift
- Plumbing
- More businesses that stay open
- Bike lanes and parking
- Mixed zoning: business and residential
- Focused development (not sprawl)
- Infrastructure
- Safe walkability
- Slower traffic downtown
- Accessibility for seniors and disabilities
- Community garden
- Skate park
- Parking
- More restaurants
- No more bars





- Better parking
- Pocket park
- Community garden vegetable
- Children's area
- Better community center
- Plant based dining options
- Healthy dining options
- Shopping options
- Diverse and inclusive
- Art galleries
- History museum
- Cultural center
- Science center
- American restaurant/sports bar: wings, burgers, fries, fish
- Sit-down diverse dining: Indian, sushi
- Size, gender, age inclusive clothing options
- More/better parking
- Bike lane and transportation to Zeb P +R
- More restaurants
- Old buildings that could be restored
- Noise ordinance/control: "live music" that is too loud
- More retail shops
- More noise regulation and well-designed ordinances
- More effective social districting not just allowances
- Coordination of food trucks (rodeo)
- More sit-down restaurants
- More options: sushi, Thai, healthy
- More food healthy options
- Options not centered on alcohols
- Laurels, flowers, murals
- Boxcar/arcade
- Event space (like graduation party, family reunion)
- More local, but still bring in franchises people leave for
- Bike shop (good if we get more paths)
- Easier to get to by bike/walking: paths



*Inclusion Question 1: Think about the ideas you have generated. If implemented, how might these ideas affect vulnerable and historically underserved communities?*

- Positive impact, these are beneficial
- Bad traffic
- Zoning, annexing historic district
- Internships help underserved teens
- Offer jobs
- Give voice
- Better transportation will help people get around
- Easier access to transportation from ...
- This plan may lift up vulnerable and underserved population

- More action and less words!
- More opportunities for vulnerable and underserved population
- Easier access to more things to do
- Town takes ideas in the future plan
- Continual input from Zebulon citizens
- Daycare options

*Inclusion Question 2: How might we take steps to ensure this plan is inclusive and takes into account the perspectives, hopes and concerns of vulnerable and historically underserved communities?*

- Accessibility: sidewalks, handicap parking, bathrooms
- Low-income housing
- Public transportation especially for underserved
- Shuttle system for elderly to get downtown
- Nice and safe subsidized housing
- Make sure we provide transportation to activities from lower income activities in Zebulon
- Do these sessions in lower income areas
- Public transportation and walkability throughout Zebulon
- Low cost/free events
- Cost effective, not wasteful
- Whole family events for kids/museum
- Center small, local businesses

*One word to describe the ideal Zebulon economy, what would it be?*

- Progressive
- Sustainable
- Robust
- Thriving
- Growing
- "wow"
- Flexible
- Inclusive
- Affordable
- Diverse
- Multi-generational
- Diversity
- Thriving
- Booming
- Accessible
- Thriving
- Growing
- Intentional planning
- improvable

### **Top Two Ideas For Improving Zebulon's Economy**

Both groups were asked to pick the top ideas their group came up with. These top ideas were written down and placed at the front of the room. Participants were then each given two sticker dots to place next to their favorite two ideas. The following ideas in order of popularity were:

- Family entertainment centers/businesses (12 dots)
- Medical facilities: mental clinics/24 hours care (7 dots)
- Communicate and incentivize growth that aligns with a sense of community that ALL (minority and women-owned businesses) can be proud of. Zebulon should be proactive about defining an identity that can steer future investment instead of investment deciding our identity. (6 dots)
- Youth activities and opportunities (4 dots)
- Jobs with an opportunity for growth (3 dots)
- Public Transportation (3 dots)
- Food service and entertainment options (2 dots)
- More diversified and charming business: Retail, High tech, hiring employees with wide variety of education (2 dots)
- Transportation management (2 dots)
- Infrastructure (1 dot)
- Child/teen centered; family oriented

### Wrap Up

Shannon Johnson then thanked participants for their time and energy. A local businesswoman conducted a raffle for a gift basket. Warren Miller then emphasized Shannon's comments and concluded the meeting.

# COMMUNITY SURVEY SUMMARY

## INTRODUCTION

The Town of Zebulon engaged Fountainworks to create an online survey to gather information about the public's opinions, concerns, and preferences on issues related to economic development. This document summarizes the information gathered in the online survey.

The survey was offered in English and Spanish. A total of **151 survey responses** were collected between October 31 and December 4, 2023.

The Town of Zebulon is dedicated to gathering community opinions and using them to inform the economic development strategic plan. The qualitative methodology employed promotes engagement and enables us to understand community preferences and concerns.

## METHODOLOGY

For the purposes of this summary, the English and Spanish results have been summarized together.

All responses were checked for differences by the demographic information provided in Question 7. Any differences discovered have been noted where appropriate.

All written comments and responses have been included in the [appendix](#).

# OVERALL SURVEY THEMES

Overall themes from the survey have been summarized in the table below.

<b>People live in Zebulon for</b>
<ul style="list-style-type: none"><li>• Housing affordability</li><li>• Family ties</li><li>• Quality of life</li><li>• Local character/charm</li><li>• Ability to commute to jobs outside of Zebulon</li></ul>
<b>People want more</b>
<ul style="list-style-type: none"><li>• Full-service restaurants</li><li>• Grocery stores</li><li>• Entertainment</li></ul>
<b>Priorities for future growth and development</b>
<ul style="list-style-type: none"><li>• Attainable/Affordable housing options</li><li>• More entertainment options</li><li>• Developing downtown</li></ul>
<b>Priorities for Jobs</b>
<ul style="list-style-type: none"><li>• Tech/IT</li><li>• Service Industry</li><li>• Higher Pay/Living Wage</li><li>• Healthcare</li></ul>
<b>How the Town can Help</b>
<ul style="list-style-type: none"><li>• Limiting over-development</li><li>• Affordable housing</li><li>• Affordability and funding</li><li>• Avoid gentrification</li></ul>

## QUESTION 1

Would you like to take this survey in English or Spanish?  
¿Te gustaría tomar la encuesta en inglés o español?

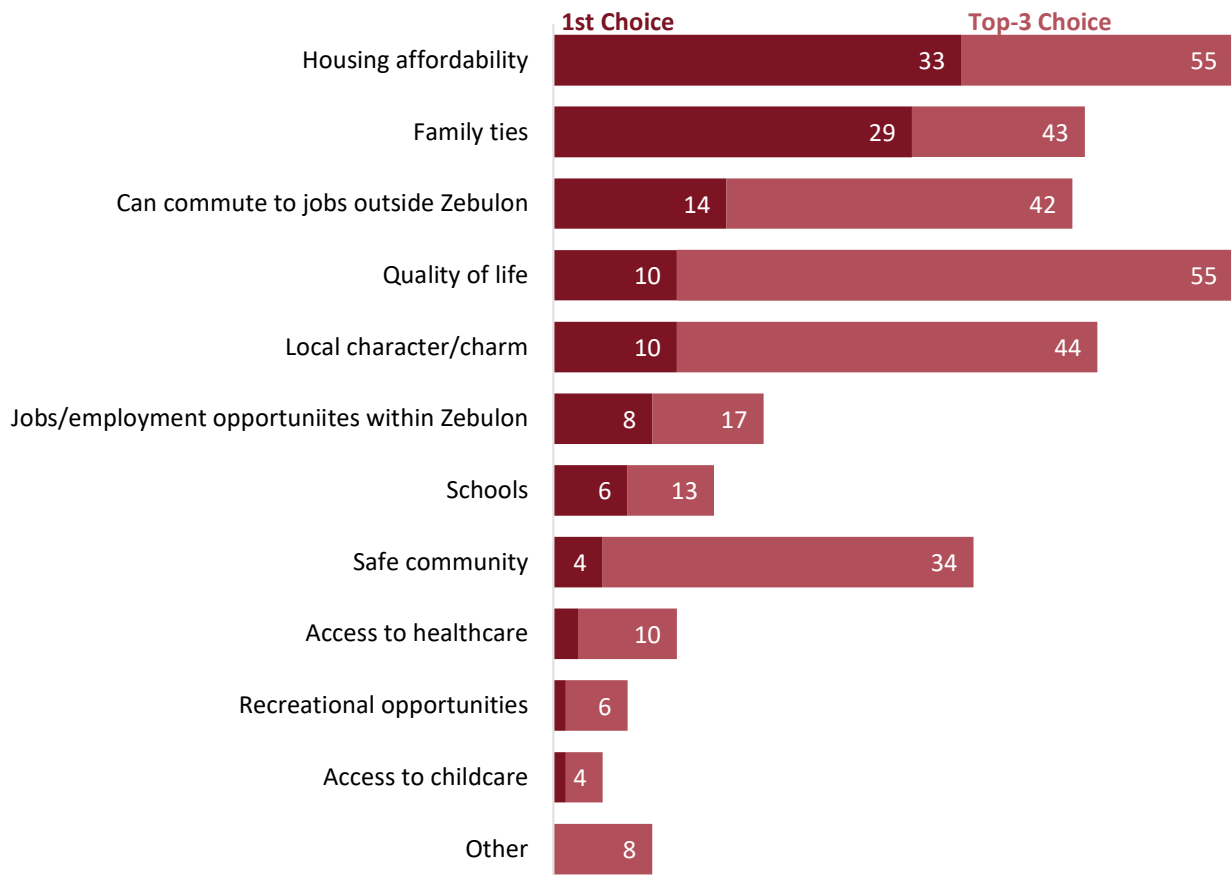
148 respondents took the survey in English  
+ 3 respondents took the survey in Spanish  
**151 total survey responses**

# QUESTION 2

What are the top 3 reasons you choose to live in the Zebulon area? Please rank in order of importance (with 1 being the most important). (123 responses)

Housing affordability and family ties were the two most popular first choices for reasons to stay in Zebulon (highlighted below in burgundy). When looking at the combined first, second, and third choices, housing affordability and quality of life tied as the most popular answer (highlighted below in lighter red). Local character/charm was the third most picked option for a top-three choice, followed very closely by family ties and the ability to commute to jobs outside of Zebulon.

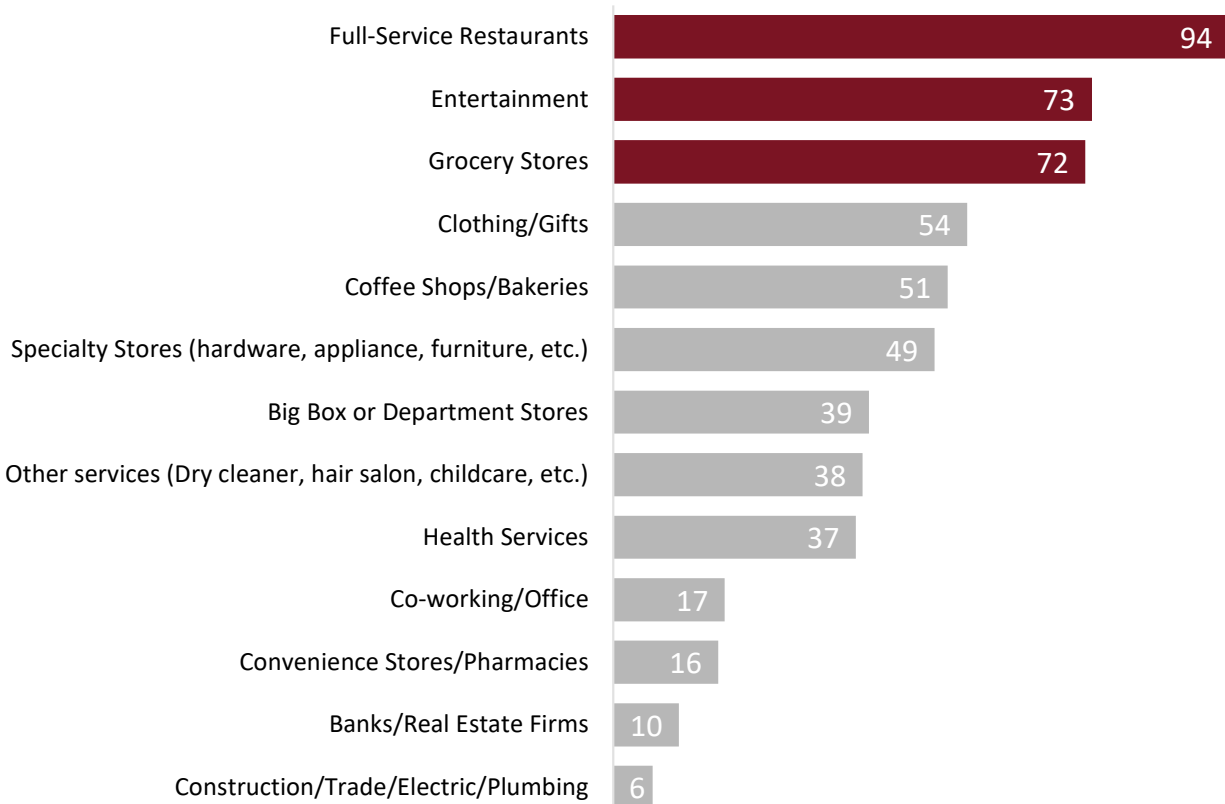
Response rates for each category are shown in the graph below, with burgundy representing the number of times a category was selected as the top priority. Light red represents the total number of times the category was voted first, second, or third choice. The “other” comments can be found in the [appendix](#).



# QUESTION 3

What types of businesses or amenities would you like to see (or see more of) in Zebulon? Check all that apply. (125 responses)

Full-service restaurants were the most popular type of business respondents wanted to see in Zebulon. Grocery stores and entertainment were the next most popular categories. 24 responses were originally marked as “other.” These responses have been categorized and are shown in the chart below. The original responses can be found in the [appendix](#).

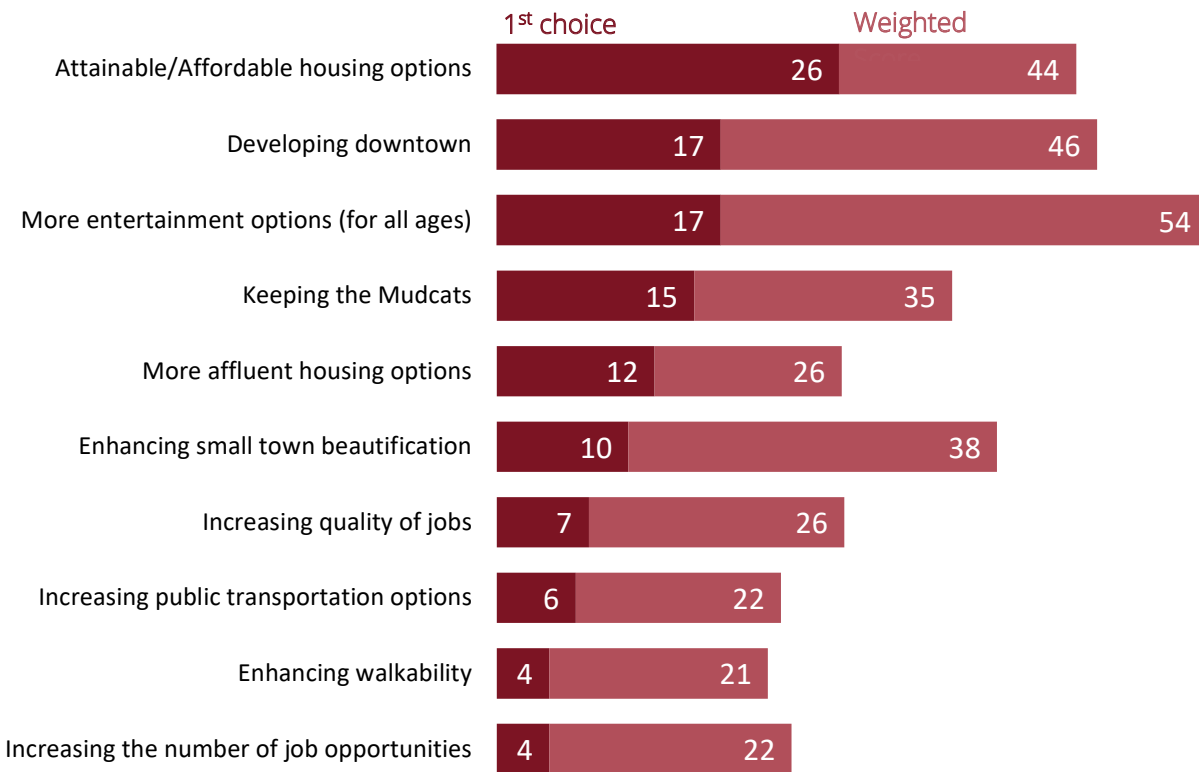


# QUESTION 4

What are your top priorities for future growth and development? Please rank your top 5 choices (with 1 being most preferred). (123 responses)

Attainable/Affordable housing options was the most picked 1<sup>st</sup> choice answer, followed by more entertainment options and developing downtown at the same rate. Applying a weighted score to include

all top-5 answers, the ranking shifted but the same answers remained in the top-three. **More entertainment options** had the highest weighted score, followed by **developing downtown** and **attainable/affordable housing options**, in that order.



Response rates for each category are shown in the graph above, with burgundy representing the number of times a category was selected as the top priority. Light red represents weighted scores. Additional respondent comments have been added to the [appendix](#).

## QUESTION 5

### *What kind of jobs does Zebulon need? (81 responses)*

This question required people write in a response. Responses were categorized according to themes they expressed, with some responses categorized into more than one theme. The most common themes are listed below.

[Tech/IT](#)<sup>78</sup> was the most popular response theme:

- Software development
- Broadband

<sup>78</sup> Themes are hyperlinked to the appendix section with a detailed list of the corresponding responses.



Service industry, Higher pay/Living Wage, and Healthcare appeared at the same rate as the next most popular themes.

#### Service Industry

- More entertainment
- Restaurants, cafes, specialty food shop servers
- Nail techs

#### Higher Pay / Living Wage

- "Careers that provide a living wage, rather than low wage customer service positions."
- "Jobs that offer livable wages and substantial growth and development opportunities for employees. Jobs with flexible work options that offer employees work life balance so that they cannot only be great corporate citizen, but great citizens in the community."
- Quality, stable, high-paying jobs

#### Healthcare

- Mental health professionals
- Doctors, nurses, and EMTs
- General health services

A detailed list of all responses can be found in the [appendix](#), as well as a [table](#) of all themes and their frequency.

## QUESTION 6

### *What can the Town do to protect vulnerable residents and businesses from being displaced due to growth and development? (86 responses)*

This question also required write-in responses. Responses were categorized according to themes expressed, with some responses categorized into multiple themes. A list of the top four response themes is below, beginning with the most common.

#### Limiting over-development

- "Stop building."
- "Keep big box stores out."
- "Stop building huge housing developments. Keep small-town life."
- "None of the infrastructure is handling the growth...including emergency services!"

#### Affordable housing

- Rent control for residential and commercial
- Improve quality, access, and quantity
- Senior homes with other resources and support

#### Affordability and funding

- Grants for small businesses
- Make it affordable to open businesses
- Home repair grants
- Make sure stores that come are affordable

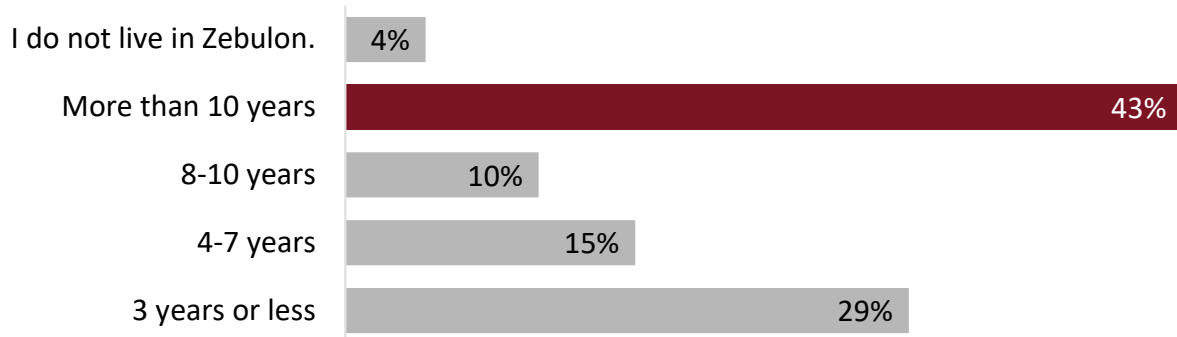
**Avoid Gentrification**

- Support local businesses in order to keep them here
- Offer community preservation services
- "Encourage growth/development in areas that will not displace current residents/businesses."

A detailed list of all responses to this question can be found in the [appendix](#), as well as a [table](#) of all themes and their frequency.

## QUESTION 7

### *How long have you lived in Zebulon? (122 responses)*

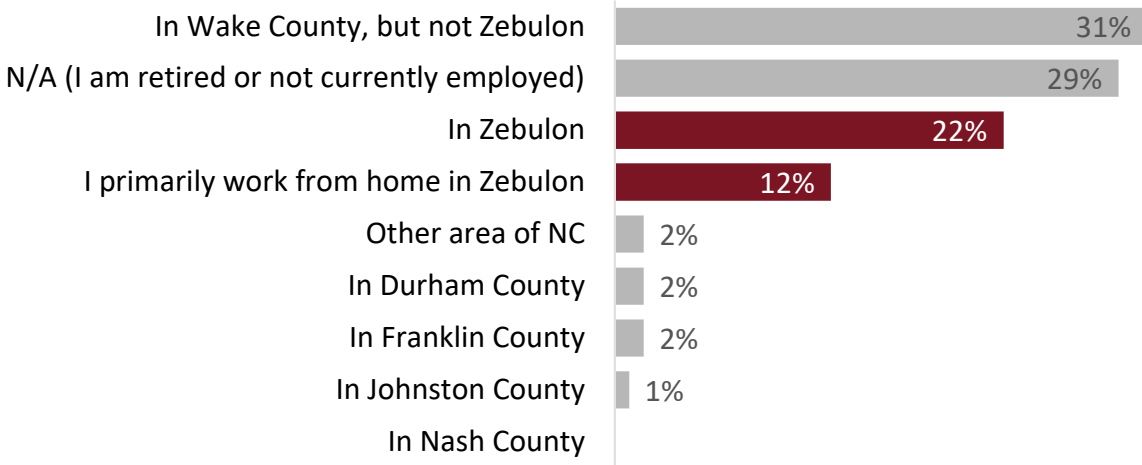


43% of survey respondents have lived in Zebulon for more than 10 years.

## QUESTION 8

### *If you work, where is your job primarily located? (121 response)*

Even though 96% of survey respondents live in Zebulon, **only 22% currently work in Zebulon and 12% work from home in Zebulon.**



Notably, 49% of respondents who have lived in Zebulon for 3 years or less work in Wake County but not Zebulon, whereas only 19% of those who have lived in Zebulon for over 10 years do. Additionally, 9% of respondents who have live in Zebulon for 3 years or less chose N/A (I am retired or not currently employed) compared to 33% of those who have lived in Zebulon for over 10 years.

Comments left on this question include:

- "I'm not working here at Zebulon because they don't have many options."
- "Retired, but always worked in Zebulon."

## QUESTION 9

Would you like to receive occasional email updates about Zebulon's economic development?

58 respondents answered yes. Their emails have been shared with economic planning department.

## SURVEY APPENDIX: OPEN-ENDED RESPONSES

"Other" answers to Question 2: Top 3 reasons you chose to live in Zebulon:

- When I moved here 10 years ago
- student at Zebulon middle and live in Rolesville
- student at Zebulon middle but does not live in Zebulon
- Get outside of Wake County but be close

- Most everyone in town used to be much friendlier when I was a child. But with so many people coming from up North and Out West and other places, the majority of the residents are no longer as friendly as they used to be because of many of the new people. Many of them have no respect for the people who grew up here or their property and the crime rate has greatly increased. So, it is becoming less friendly and a less desirable place to live by the day.
- Zebulon Magnet middle is not a safe school
- Lived here all my life
- Not everyone drinks alcohol!

*“Other” answers to Question 3: What types of businesses or amenities would you like to see in Zebulon?*

- Entertainment
- Senior Center
- Museum
- Movie theater
- Aldi
- No more big-box or chain restaurants!!!!!!
- Zebulon is already called a bedroom community for Raleigh:-)
- Yoga Studio
- A Harris Teeter or Publix would be great
- nonprofit, community spaces
- Hotel
- A community skill center where people can learn trades like carpentry, mechanics, etc. also then can get free counseling for people dealing with depression, alcohol, and Drugs.
- Parks
- Clothing Alteration Business, Jersey Mike's
- Fast Food Variety
- A hobby store or like a U.S. military shop or Plen store like a model shop
- School
- Activity Center (ax throwing, bowling)
- consignment store like Suzanna's in Rolesville... a thrift "mall" where a large space has smaller vendor spaces (like Suzanna's but less pricey antiques like they have) ... a store full of Made in NC products! ...homemade bread bakery....
- More Fast-food options
- Unique shops and activities, museums,
- Historic museum
- working food bank
- better education, bookstore

*Additional comments from Question 4: What are your top priorities for future growth and development?*

- Keeping small downtown charm intact
- Restaurants!!!!!!
- #1 Traffic & Parking downtown area
- More health care options
- Add more sidewalk
- Fix the pothole
- Not allowing housing growth to overpower roadways!

- Plen store
- Help improve curb/appeal/façade of downtown residential housing
- Quality job opportunities
- Keeping small town charm.

*Response Themes and Frequency from Question 5: What kind of jobs does Zebulon need?*

Tech/IT	14
Service Industry (Restaurant, Entertainment, Beauty)	12
Higher Pay/Living wage	12
Healthcare	12
Trades	9
Professional	7
Comment/Complaint	6
Emergency Responder	5
Local/Small business	5
Jobs with advancement potential	5
Office	5
Care Industry	4
Student and Youth Jobs	4
Entry-level	4
More Jobs	4
Manufacturing	4
Research and Development	3
Community-based	3
Corporate	3
Retail	3
Remote / Flexible	2
Transportation	2
I don't know	2
Commute Out for Work	1
Non-manufacturing	1
Skilled labor	1
Government	1
Education	1

### Responses to Question 5: What kind of jobs does Zebulon need?

- Not sure
- Biotech jobs (laboratory and data analysis), jobs that can become a career, accountants (tax preps), middle management jobs
- Office
- More entertainment, restaurants and other activities for families.
- Service industry and local businesses
- Trade
- Tech/IT
- Careers that provide a living wage, rather than low wage customer service positions.
- Healthcare
- Mental health professionals
- MORE POLICE, FIRE AND EMS
- People can commute to Raleigh for career opportunities.
- Professional
- Bigger retailers, restaurants
- Tech, restaurants, childcare
- Non-manufacturing jobs
- Small business
- Skilled
- Is this honestly a question? For crying out loud. Do better.
- I don't know
- IT, research and development, life sciences
- 1. Employment for College & advanced degree candidates
- Full-time jobs with good benefits.
- Emergency services, paramedics, nurses, general health services jobs, Office jobs, retail, servers.
- More local farm jobs
- Higher paying jobs-Healthcare for example; Entry level jobs with growth opportunities
- Biomedical, transportation services, more small businesses
- Remote in shared spaces, community based and/or higher than minimum wage.
- Technical
- Electrical, tech related and entertainment related.
- Health care, Labor skills trades
- Healthcare - need a hospital. Office jobs.
- Police stations, fire dept, hospitals.
- Pothole fixer jobs
- Nail techs and Boba Tea shops.
- pothole fixer jobs
- Jobs for younger people
- more trash pickups so we don't throw it in the grass.
- More manufacturing jobs that pay more than \$13-\$15 an hour.
- Community Service Jobs and Transportation
- Doctors, Nurses, and EMTs
- Jobs that offer livable wages and substantial growth and development opportunities for employees. Jobs with flexible work options that offer employees work life balance so that they cannot only be great corporate citizen, but great citizens in the community.
- Just more as the population is increasing

- appropriate job opportunities for youth, jobs providing living wage
- Jobs that enhance individuals' ability to become entrepreneurs/ self-employed.
- Health care, Industry, technology
- Companies that are large enough to need separate Accounts Payable or Accounts Receivable or Payroll positions. Possibly in Computer Industry, Telecommunications Industry, Healthcare Industry.
- Zebulon should have more restaurants and bars, as well as activities where parents and children can spend time together. The Parks & Recreation programs should be more developed. Zebulon also needs more real estate firms and more in-town attorneys.
- Jobs in every category to fit with the diverse public we have here in Zebulon.
- Any types that can fit
- PLEN PILOTS
- for teens and fun jobs
- construction
- bakeries
- healthcare
- More care dealers.
- Manufacturing, technology
- Zebulon needs office jobs so that folks will not have to commute to Raleigh or Durham or Wilson.
- Zebulon needs more jobs for middle class citizens. There are not enough restaurants in the area to offer decent serving jobs. It would also be nice to have some corporate companies nearby for those who want that kind of job as well.
- Corporate Jobs
- Small Business and entry level
- Tech and manufacturing
- Long term higher paying.
- More Police officers; Firemen; Home Care workers;
- More professional jobs that offer higher pay and benefits.
- we need jobs that require a high school diploma or 2-year degree
- stable decent paying jobs
- Ones whose pay would allow the person to live in Zebulon
- Manufacturing
- Tech / software development
- Diversity is good. I think looking at what the needs and abilities of the population would be a good start.
- Professional
- Warehouse jobs more office jobs too!
- High Tech and Broadband opportunities.
- Tech, electronics, electricity and other trades.
- Medical, tech, entertainment, major chain retail, tailor and shoe repair, government branch-fed, state and local
- Mid-managerial, Home health, IT jobs
- Trades
- Quality, stable, high-paying jobs. White Collar
- start building more fast-food places
- Mas escuelas (More schools)

### *Popular themes to Question 5: What kind of jobs does Zebulon need?*

#### Tech/IT

- Tech/IT
- Tech, restaurants, childcare

- IT, research and development, life sciences
- Technical
- Electrical, tech related and entertainment related.
- Health care, Industry, technology
- Companies that are large enough to need separate Accounts Payable or Accounts Receivable or Payroll positions. Possibly in Computer Industry, Telecommunications Industry, Healthcare Industry.
- Manufacturing, technology
- Tech and manufacturing
- Tech / software development
- High Tech and Broadband opportunities.
- Tech, electronics, electricity and other trades.
- Medical, tech, entertainment, major chain retail, tailor and shoe repair, government branch-fed, state and local
- Mid-managerial, Home health, IT jobs

### Service Industry

- More entertainment, restaurants and other activities for families.
- Service industry and local businesses
- Bigger retailers, restaurants
- Tech, restaurants, childcare
- Emergency services, paramedics, nurses, general health services jobs, Office jobs, retail, servers.
- Electrical, tech related and entertainment related.
- Nail techs and Boba Tea shops.
- Zebulon should have more restaurants and bars, as well as activities where parents and children can spend time together. The Parks & Recreation programs should be more developed. Zebulon also needs more real estate firms and more in-town attorneys.
- bakeries
- Zebulon needs more jobs for middle class citizens. There are not enough restaurants in the area to offer decent serving jobs. It would also be nice to have some corporate companies nearby for those who want that kind of job as well.
- Medical, tech, entertainment, major chain retail, tailor and shoe repair, government branch-fed, state and local
- start building more fast-food places

### Higher Pay / Living Wage

- Careers that provide a living wage, rather than low wage customer service positions.
- Full-time jobs with good benefits.
- Higher paying jobs-Healthcare for example; Entry level jobs with growth opportunities
- Remote in shared spaces, community based and/or higher than minimum wage.
- More manufacturing jobs that pay more than \$13-\$15 an hour.
- Jobs that offer livable wages and substantial growth and development opportunities for employees. Jobs with flexible work options that offer employees work life balance so that they cannot only be great corporate citizen, but great citizens in the community.
- appropriate job opportunities for youth, jobs providing living wage
- Long term higher paying.
- More professional jobs that offer higher pay and benefits.
- stable decent paying jobs
- Ones whose pay would allow the person to live in Zebulon
- Quality, stable, high-paying jobs. White Collar

### Healthcare



- Healthcare
- Mental health professionals
- Emergency services, paramedics, nurses, general health services jobs, Office jobs, retail, servers.
- Higher paying jobs-Healthcare for example; Entry level jobs with growth opportunities
- Health care, Labor skills trades
- Healthcare - need a hospital. Office jobs.
- Police stations, fire dept, hospitals.
- Doctors, Nurses, and EMTs
- Health care, Industry, technology
- Companies that are large enough to need separate Accounts Payable or Accounts Receivable or Payroll positions. Possibly in Computer Industry, Telecommunications Industry, Healthcare Industry.
- healthcare
- Medical, tech, entertainment, major chain retail, tailor and shoe repair, government branch-fed, state and local

*Responses to Question 6: What can the town do to protect vulnerable residents and businesses from being displaced due to growth and development?*

- Not sure
- Directory of local businesses with website info. Making sure stores that come are affordable. Prioritizing local small businesses. Making sure to preserve the history of the town.
- Stop building
- Better infrastructure.
- Get rid of the boozier venues or at least put the road blocks back in place to get the drunk drivers out. How about a special camera that takes the photos of plates like in Raleigh and wake forest to keep our streets safer and those that would do it harm out
- Grandfather laws
- Be more involved
- Reduce vacant landlords who do not live nearby
- I think that the town should research this question and discuss with experts in this field. It's an important issue that should be handled with knowledge and care, rather than a group vote.
- Help them financially
- It's time to limit affordable housing options & being the place Raleigh sends their vulnerable residents. Zebulon is a bedroom community of Raleigh that needs development because Zebulon is the last stop before Wilson or Nashville/Rocky Mount. It needs to be a destination not a dumping ground.
- Keep big box stores out.
- Plan long-term growth instead of as it happens
- Provide more parking
- N/a
- Rent control residential and commercial, affordable housing, grants for small businesses
- Stop building huge housing developments. Keep small town life.
- Stop housing growth. Too many to close together. None of the infrastructure is handling this growth... including emergency services!
- Not issue so many permits. Zebulon is already called a bedroom community for Raleigh:-)
- What can this firm do to develop a better questionnaire?

- Include the citizens in conversations. Make sure they are aware of the growth and have the opportunity to weigh in on it. Social media is an easy way to do this but you must remember that many of them don't use social media in that way. For instance, many of them will not be aware of this survey.
- STOP raising taxes! Stop raising the pay for commissioners (when you chose to run for office, you knew the pay). Your job is to serve, not earn a living off the taxpayers' back (ie, the Zebulon residents). If you need more income, seek a better paying job or become an entrepreneur.
- annex contingent areas and set higher standards consistent with the towns long range planning for project approval
- Make sure affordable housing stays in place. Also working to bring a couple big name companies to the area. GSK is good, but a few more would be great. Market it as the RTP of the East.
- Focus on fully staffing emergency services and building more roads to relieve the increasing traffic thanks to all the new home construction and population growth. This should be considered when allowing more home constructions.
- Ask for their input and ideas like this survey does. Provide more than one option to them when it comes time for development.
- Continuing engaging residents in these surveys; Really consider the wants/needs from the residents; Limit the same type of businesses to reduce competition (For example with have 3 pizza restaurants in 1 shopping center.)
- limit rezoning for high dollar development
- Limit chains/big box to outskirts.
- Do a step program to slowly bring up the business. Work an affordable plan. For residence look for grant monies to help for improvements.
- Keep taxes low. Encourage growth/development in areas that will not displace current residents/businesses. Use incentives if necessary.
- Patrol the city, safety prevention programs.
- Fix the traffic situation. It's horrible! Have any of you Zebulon downtown residences have to be in Raleigh by 8 am to work? 264 is nothing but a death trap from Zebulon to Knightdale. Also, Arendell Avenue from Pippin Road to Gannon is outrageous.
- get someone to buy the businesses and open them up to save them from closing or being displaced.
- Fix potholes
- Stop Building so many Bars.
- spend more time making those laces sustainable
- Avoid building in residential areas
- put more time and effort to sustain those places then we can focus on other things.
- To be honest I don't know
- no se (I don't know)
- Zebulon needs to have MORE affordable housing due to the economy being as bad as it is. Many people getting on social media asking about houses to rent. They cannot afford to live in Raleigh. Their jobs are here in Zebulon.
- Have better mayors
- having stricter laws and more police officers
- Create opportunities for outreach and charity for those who migrated to the area from places like Raleigh and Durham looking for affordable housing. Create a way that those who are new to the community can support individuals who are the foundation of the community that they've

been able to move to. Zebulon can be a place where people not only come to invest in themselves and their family, but they also invest in the community.

- STOP the huge influx of people. We are native and have contributed to the community for decades and now my own children can't see themselves staying here. That is sad. They grew up in our schools, sports, Scouts and dance but hate what the area is becoming.
- Have resources inflamed to help the small business owners. Affordable housing for the vulnerable education financial prep and outreach, funding for home preservation and business assistance, jobs opportunities for those underemployed
- Provide development for businesses that want to take part in personal and business development courses/training.
- More support for existing local businesses to keep them here.
- Offer low income &/or currently unemployed residents home repair grants (that don't have to be repaid - possibly from the federal government) for immediate needs that they can't afford to pay for themselves so that they will not be forced to leave their home due to not being able to afford proper upkeep. The way the town used to be, people would get together to help their family, friends, neighbors and fellow church members. Now that kind of thing is mainly through churches or government programs.
- The town should not have as a priority to protect vulnerable residents and businesses from being displaced due to growth and development. Barbee Street should be a priority in downtown development. Large and small developers should be encouraged and assisted by the Planning Department, instead of being discouraged, perhaps in exchange for commitment to some affordable housing.
- Provide for more access and improve low-income safe housing.
- I don't really know how
- Maybe volunteer security for parts of town.
- making a job
- more economy
- have better security
- I don't know
- Hire more people that can't find one.
- Ask them what they need.
- Make it affordable for folks to open businesses downtown. Give independent business owners an incentive to keep their businesses in Zebulon. Keep the city residential tax low. People are taxed enough by the State and Federal Governments.
- already happened... everywhere, not just Zebulon. I think we're past correct planning for growth and development! missed that boat. Affordable housing is extinct
- Plan. That's the only way to make sure everyone knows what is happening and why.
- Stop building so many homes when our town does not have the infrastructure to support that many people.
- Showcase small business section in website and newsletters
- Affordable rent and housing
- Be respectful. Other business need to be respectful of each other.
- Survey areas to identify at risk communities, such as number of evictions for foreclosures in an area; landlords who don't keep up their property but increase rents; home prices increasing
- Stop growing the town uncontrollably.

- Ensure that traffic congestion is minimized, that more higher priced homes are built (rather than the cheaper ones that are being built now) and that more entertainment opportunities are provided in a safer environment.
- not sure
- offer community preservation services, like helping develop a land trust or similar program
- Stop growing at this rate, stop developers from out-pricing people,
- Decent Senior Homes, with convenience to Medical and groceries. Support Shop local Event.
- Continue to work with the chamber of commerce to highlight small business owners and their products and services. Support local religious organizations and their outreach to older residents and or residents that may be struggling financially. Maybe the town could create a web presence that pulls together government services with church food banks and non-profits that help battered women etc. to help people searching for help find available resources in the area.
- Offer grants to improve and stabilize existing housing inventory. Support owner occupied housing and reduce absent landlord ownerships
- Look for grants or other resources to provide support and ways to help make improvements to be successful. I like what the Detective is doing to help with our youth who need a counselor. I think finding support that has a face for the vulnerable in our community. Helping to navigate resources.
- Encourage small local businesses. Doing frequent events to get their name out and heard.
- Stop the growth
- Please no more cookie cutter high density developments like we are seeing now. This will destroy the character and charm of the area if it continues. More developments like Betty Ray use to development. Saddens me to see the kind of development going on here. We have seen what this has done to other towns.
- Be more mindful of overdevelopment in areas that has been an intricate part of establishing this town. Property tax stabilization for already established residents on fixed incomes
- Disallow utilizing eminent domain. Stop trying to be Cary or Apex. Stop unbridled growth until infrastructure improvements are started. Two lane roads, be it country ones or Gannon Avenue or Shepard School road MUST be widened before the entire town becomes one big, massive traffic snarl. Despite a much denser, heavily populated area than Zebulon, it's easier to get around many places in Raleigh, especially North Raleigh, because the roads were widened in conjunction with the growth, not years (or decades) afterwards.
- Leave us alone ~ quit spending money like the Federal government.
- I don't know, but this needs to be a priority!
- Provide public transit, and access to higher paying jobs. Increase access to equitable housing options. Work with local business to adapt business models to changing client demographics.

*Response themes and frequency from Question 6: What can the town do to protect vulnerable residents and businesses from being displaced due to growth and development?*

Limit over-development	17
Affordable housing	14
Affordability & Funding	10

Gentrification	8
Comment/Complaint	8
Communication	7
I don't know	7
Traffic Safety	6
Planning and Research	5
Infrastructure	5
Serve the vulnerable.	4
Taxes	4
Town support	4
Laws and Statutes	4
Emergency Responders	4
Preserve small-town	3
Prioritize community needs	3
Create jobs	3
Don't prioritize the vulnerable.	3
Limit alcohol	2
Education and Training	2
Safety and Security	2
Preserve history	2
Better communication	1
Public transportation	1
Non-answer	1
Effort	1
Inclusion	1

*Popular themes and responses to Question 6: What can the town do to protect vulnerable residents and businesses from being displaced due to growth and development?*

Limit Over-Development

- Stop building
- Keep big box stores out.
- Stop building huge housing developments. Keep small town life.
- Stop housing growth. Too many to close together. None of the infrastructure is handling this growth... including emergency services!
- Not issue so many permits. Zebulon is already called a bedroom community for Raleigh :-)
- Continuing engaging residents in these surveys; Really consider the wants/needs from the residents; Limit the same type of businesses to reduce competition (For example with have 3 pizza restaurants in 1 shopping center.)
- limit rezoning for high dollar development
- Limit chains/big box to outskirts.

- Avoid building in residential areas
- STOP the huge influx of people. We are native and have contributed to the community for decades and now my own children can't see themselves staying here. That is sad. They grew up in our schools, sports, Scouts and dance but hate what the area is becoming.
- Stop building so many homes when our town does not have the infrastructure to support that many people.
- Stop growing the town uncontrollably.
- Stop growing at this rate, stop developers from out-pricing people,
- Stop the growth
- Please no more cookie cutter high density developments like we are seeing now. This will destroy the character and charm of the area if it continues. More developments like Betty Ray use to development. Saddens me to see the kind of development going on here. We have seen what this has done to other towns.
- Be more mindful of overdevelopment in areas that has been an intricate part of establishing this town. Property tax stabilization for already established residents on fixed incomes
- Disallow utilizing eminent domain. Stop trying to be Cary or Apex. Stop unbridled growth until infrastructure improvements are started. Two lane roads, be it country ones or Gannon Avenue or Shepard School road MUST be widened before the entire town becomes one big, massive traffic snarl. Despite a much denser, heavily populated area than Zebulon, it's easier to get around many places in Raleigh, especially North Raleigh, because the roads were widened in conjunction with the growth, not years (or decades) afterwards.

### Affordable Housing

- Rent control residential and commercial, affordable housing, grants for small businesses
- Make sure affordable housing stays in place. Also working to bring a couple big name companies to the area. GSK is good, but a few more would be great. Market it as the RTP of the East.
- Zebulon needs to have MORE affordable housing due to the economy being as bad as it is. Many people getting on social media asking about houses to rent. They cannot afford to live in Raleigh. Their jobs are here in Zebulon.
- Create opportunities for outreach and charity for those who migrated to the area from places like Raleigh and Durham looking for affordable housing. Create a way that those who are new to the community can support individuals who are the foundation of the community that they've been able to move to. Zebulon can be a place where people not only come to invest in themselves and their family, but they also invest in the community.
- Have resources inflamed to help the small business owners. Affordable housing for the vulnerable
- Offer low income &/or currently unemployed residents home repair grants (that don't have to be repaid - possibly from the federal government) for immediate needs that they can't afford to pay for themselves so that they will not be forced to leave their home due to not being able to afford proper upkeep. The way the town used to be, people would get together to help their family, friends, neighbors and fellow church members. Now that kind of thing is mainly through churches or government programs.
- The town should not have as a priority to protect vulnerable residents and businesses from being displaced due to growth and development. Barbee Street should be a priority in downtown development. Large and small developers should be encouraged and assisted by the Planning Department, instead of being discouraged, perhaps in exchange for commitment to some affordable housing.
- Provide for more access and improve low-income safe housing.
- already happened... everywhere, not just Zebulon. I think we're past correct planning for growth and development! missed that boat. Affordable housing is extinct
- Affordable rent and housing
- Survey areas to identify at risk communities, such as number of evictions for foreclosures in an area; landlords who don't keep up their property but increase rents; home prices increasing

- Decent Senior Homes, with convenience to Medical and groceries. Support Shop local Event.
- Offer grants to improve and stabilize existing housing inventory. Support owner occupied housing and reduce absent landlord ownerships
- Provide public transit, and access to higher paying jobs. Increase access to equitable housing options. Work with local business to adapt business models to changing client demographics.

### Affordability and Funding

- Directory of local businesses with website info. Making sure stores that come are affordable. Prioritizing local small businesses. Making sure to preserve the history of the town.
- Rent control residential and commercial, affordable housing, grants for small businesses
- Do a step program to slowly bring up the business. Work an affordable plan. For residence look for grant monies to help for improvements.
- Keep taxes low. Encourage growth/development in areas that will not displace current residents/businesses. Use incentives if necessary.
- education financial prep and outreach, funding for home preservation and business assistance, jobs opportunities for those underemployed
- Offer low income &/or currently unemployed residents home repair grants (that don't have to be repaid - possibly from the federal government) for immediate needs that they can't afford to pay for themselves so that they will not be forced to leave their home due to not being able to afford proper upkeep. The way the town used to be, people would get together to help their family, friends, neighbors and fellow church members. Now that kind of thing is mainly through churches or government programs.
- Make it affordable for folks to open businesses downtown. Give independent business owners an incentive to keep their businesses in Zebulon. Keep the city residential tax low. People are taxed enough by the State and Federal Governments.
- Offer grants to improve and stabilize existing housing inventory. Support owner occupied housing and reduce absent landlord ownerships
- Look for grants or other resources to provide support and ways to help make improvements to be successful. I like what the Detective is doing to help with our youth who need a counselor. I think finding support that has a face for the vulnerable in our community. Helping to navigate resources.

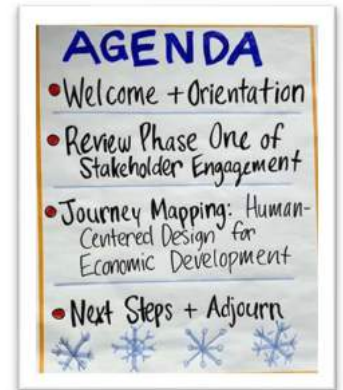
### Gentrification

- Keep taxes low. Encourage growth/development in areas that will not displace current residents/businesses. Use incentives if necessary.
- get someone to buy the businesses and open them up to save them from closing or being displaced.
- spend more time making those places sustainable
- put more time and effort to sustain those places then we can focus on other things.
- More support for existing local businesses to keep them here.
- Offer low income &/or currently unemployed residents home repair grants (that don't have to be repaid - possibly from the federal government) for immediate needs that they can't afford to pay for themselves so that they will not be forced to leave their home due to not being able to afford proper upkeep. The way the town used to be, people would get together to help their family, friends, neighbors and fellow church members. Now that kind of thing is mainly through churches or government programs.
- offer community preservation services, like helping develop a land trust or similar program
- I don't know, but this needs to be a priority!

# STAFF DESIGN THINKING RETREAT SUMMARY

## MEETING PURPOSE

The Town of Zebulon convened a retreat with staff and key community stakeholders to review and discuss Phase One of stakeholder engagement efforts and use design-thinking to understand how community members and businesses interact with the Town on economic development issues. The meeting was professionally facilitated by Fountainworks. Comments were captured as the conversation flowed and do not reflect any priority unless otherwise noted.



### Objectives:

- Review, recap, and discuss the environmental assessment report
- Present findings from the first phase of stakeholder engagement, including insights from the three community cafés and the community survey
- Envision the next round of stakeholder engagement using journey mapping and design thinking



### Meeting Participants:

- Shannon Johnson, Town of Zebulon Economic Development Specialist
- Teresa Piner, Downtown Main Street Director
- John Saffold, Zebulon Chamber of Commerce Executive Director
- Brandon McCraney, Olde Raleigh Distillery Owner
- Sam Rauf, Wake County Economic Development Senior Economic Development Manager
- Michael Clark, Town of Zebulon Planning Director
- Julie Brenman, Maddie Shea, and Laura Gomez-Nichols of Fountainworks

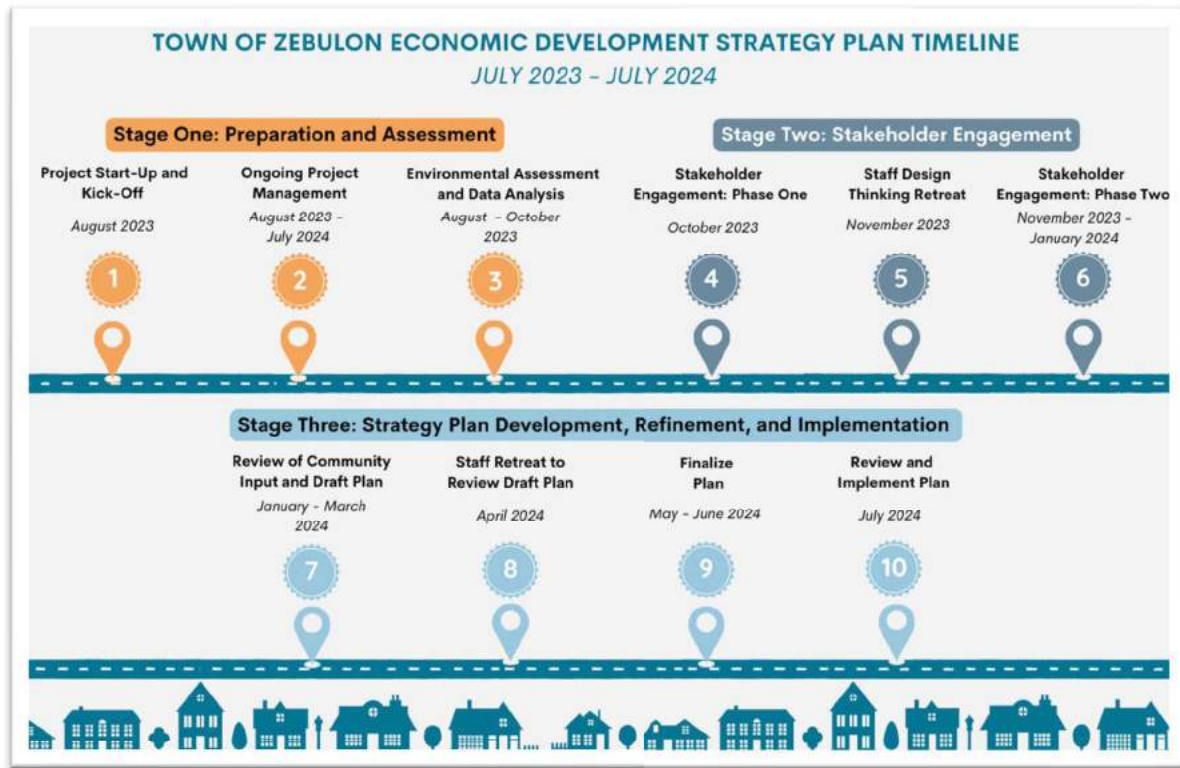
## AGENDA

Julie walked the group through the meeting's agenda:

- Welcome and Orientation
- Review Phase One of Stakeholder Engagement
- Journey Mapping: Human Centered Design for Economic Development
- Next Steps & Adjourn



Next, a brief overview of the Economic Development Strategic Planning process was given (displayed below). Please note, this timeline has shifted slightly, but is still on target for completion by July 2024.



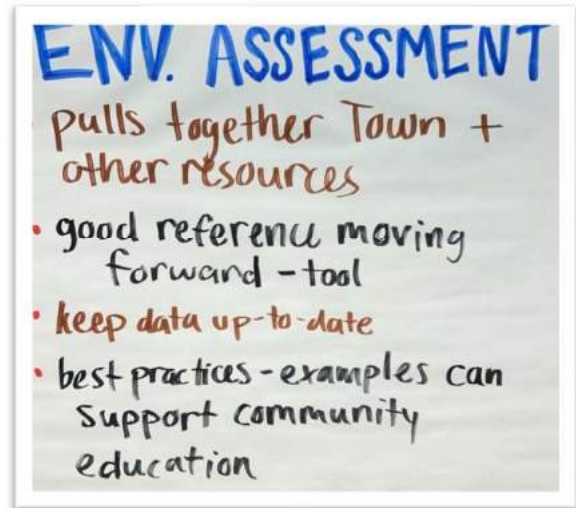
# DOCUMENT REVIEW AND DISCUSSION

Maddie gave a brief overview of the Environmental Assessment. A summary of this assessment can be found in the [appendix](#). Laura then gave a brief overview of the findings from the Community Engagement Summary and the Community Survey Summary. The handout for this discussion can be found in the [appendix](#).

Next, participants were split into three groups to discuss each of these three documents. After these small group discussions, each group reported out their key takeaways. Their responses are captured below.

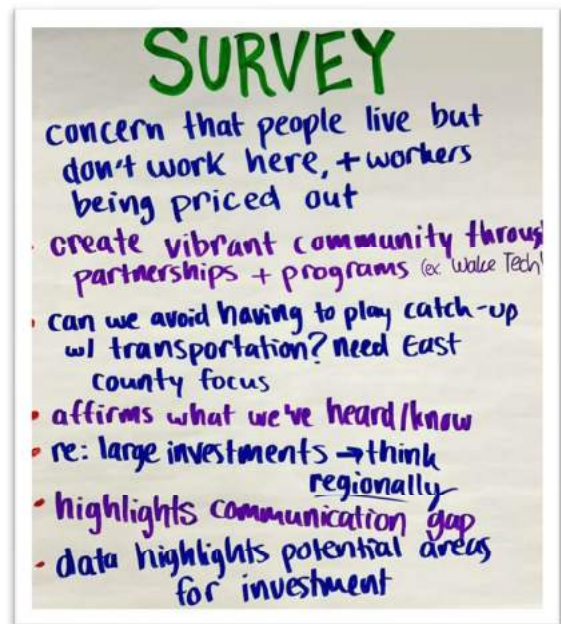
## Responses to Environmental Assessment

- This robust document pulls together Town as well as other resources.
  - o "I love this document on its own."
  - o "I want to keep this document at my desk. And so would elected officials and the management team."
- It is a good reference/tool moving forward, but the data will need to be kept up-to-date.
- The best practices examples can support community education.
  - o For example, the Town may not take the lead in establishing land trusts, but other entities can.



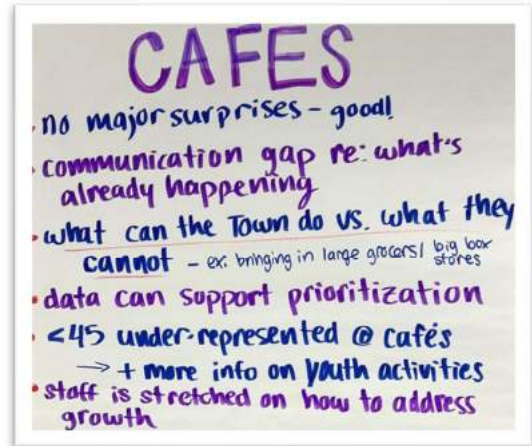
## Responses to Community Survey Summary

- Concern that people live here but don't work here and workers might be priced out
  - o Vibrant small towns eat, live, and work in town.
- Opportunity to create vibrant community through partnerships and programs
  - o Example: Wake Tech
- Can we avoid having to play catch-up with transportation?
  - o Regional Transportation Alliance meetings seem focused everywhere but east County.
  - o It would make sense to focus on connectivity with new Wake Tech as a hub and then creating spokes out to the surrounding communities.
    - "If you want a strong workforce, you want access to educational institutions."
- The Chambers of Commerce are starting to work more regionally.
  - o It makes sense for us to think regionally as far as major investments are concerned (i.e. healthcare and education), but balance this with our need to keep Zebulon identity.
- The survey highlights communication gaps. Resources exist, but people don't know about them.



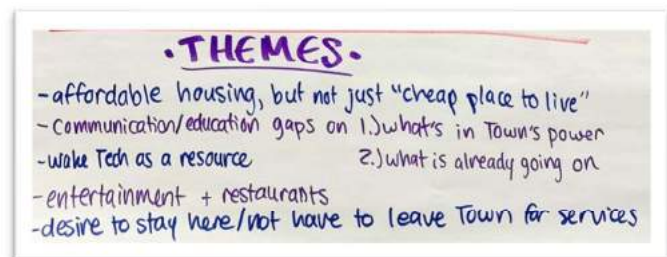
## Responses to Community Engagement Summary

- No major surprises → good!
- Communication gap in regard to existing efforts
- It also highlights that many do not know what the Town can vs. cannot do
  - o The Town is limited to what they can actually do except through coding and zoning.
- Data can support prioritization
- People younger than 45 are under-represented at the cafés.
  - o These people tend to be newer residents and residents with younger families. So, we are missing information on their needs, like with youth activities.
- Staff is stretched on how to address a growing community's needs with limited resources.
- Can see how navigating the various government entities can be confusing
  - o Example: Confusion about signage ordinances and who to ask
  - o There does seem to be a general sense of improvement on these issues, but could be useful to have an individual to help navigate.
  - o If you're starting a business, you don't know what you don't know.
- How do we preserve affordable housing while bringing in higher income?
  - o A higher median income would support many of the desires mentioned, such as bringing in larger grocers.



## Consistent Themes Across Documents

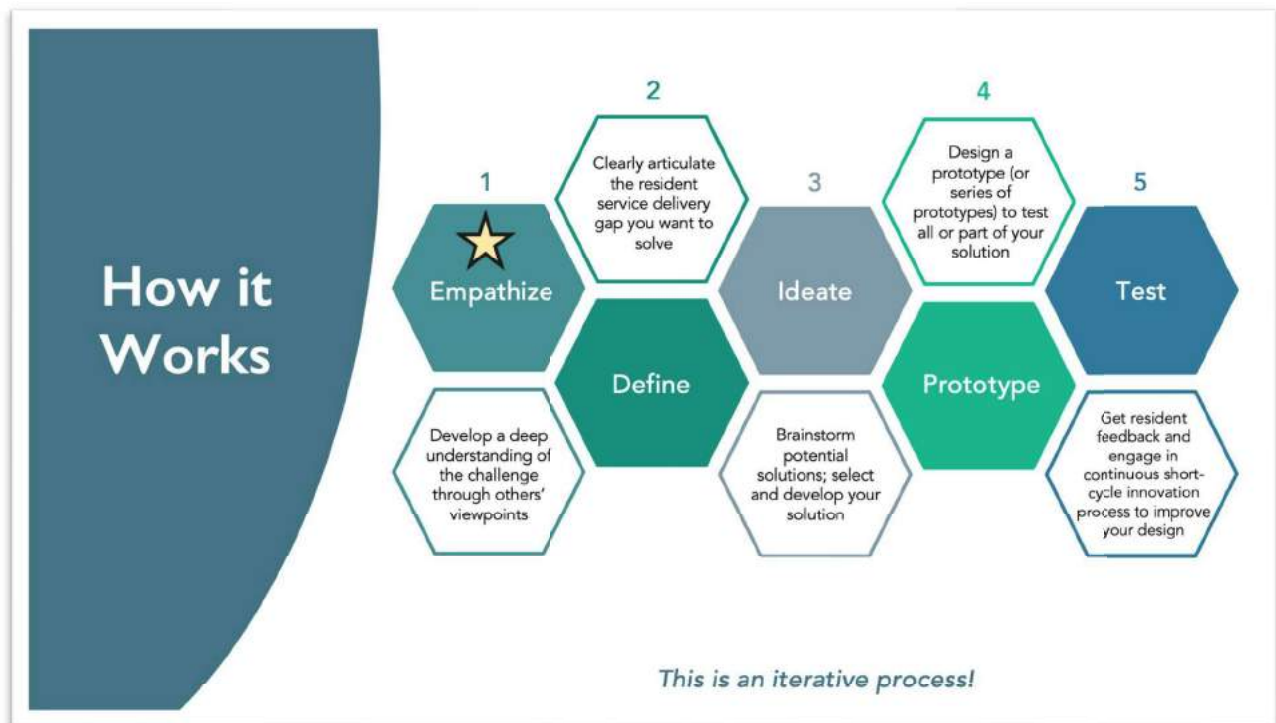
- Affordable housing, but not just a "cheap place to live"
- Communication education gaps on:
  - o What's in Town's power
  - o What is already going on and available
- Wake Tech as a resource
- Entertainment and restaurants
- Desire to stay here and not have to leave Town for services



# JOURNEY MAPPING: HUMAN-CENTERED DESIGN FOR ECONOMIC DEVELOPMENT

After a short break, Julie walked the group through an introduction to journey mapping and human-centered design thinking. The [slide deck](#) and [handout](#) used can be found in the appendix.

## Design Thinking Steps



- As part of the empathize stage of design thinking, journey mapping is a useful tool for understanding all of the steps that different stakeholders take throughout a process.
- Journey mapping presents the opportunity for participants to step outside of their usual role and see the process through different perspectives.
- The idea is to put the user at the center of attention in order to reach solutions that reflect the user's needs.

To better understand what people need in regards to economic development, the remainder of the retreat focused on empathizing. Participants were split into three groups and each group was assigned one of three personas:

1. Entrepreneur with a new business idea
2. Existing businessowner
3. Large corporation

The groups were instructed to assume the role of their persona and walk through the process of an envisioned scenario they may face in Zebulon. Journey maps were then reported back to the group as a whole and a short discussion followed each report. Comments have been captured below.

## Entrepreneur with a New Business Idea

- **Scenario:** Hoping to open an antique store downtown in the old Whitley building
- **Journey:**
  - o People see a for sale or for rent sign when they come to town
  - o This might trigger them to call a real estate agent.
  - o Real estate agent might give them bad information, such as saying a certain use is allowed when it is not.
  - o Client gets very mad when they find out.
  - o Client might have to contact a bank depending on lease or mortgage.
  - o Banks says they need zoning verification letter to make sure something is permitted.
  - o Client goes to planning department for verification.
    - Planning department informs the client of the upgrades they would have to do and all the new forms and processes required.
    - Planning department puts client in touch with downtown coordinator.
- **Emotions:** Started with excitement, afterward feeling frustration, sadness, anger
- **Insights and Opportunities**
  - o A central location or individual to help a new business navigate through the process would be a huge value-add.
    - "A new-business GPS"
    - Not providing all the answers, but providing guidance
    - Some people are inexperienced, so having the resource is very helpful.
  - o Brandon discussed how difficult and frustrating his experience opening his business downtown was. After reaching a breaking point, he reached out to Michael. He said he should have gone to Michael much sooner.
  - o The Town is often an afterthought as a resource, but it shouldn't be. The group discussed that the Town should be sharing the message "We want you to be successful," with business owners.
  - o The Town has changed the focus and gotten rid of planners who only said no, but we still have to fix perspective.
  - o Because of the low rents, people with different levels of sophistication and preparedness have ideas for businesses. The Town often has to provide more personalized guidance, compared to other municipalities.
  - o There is an opportunity for the Town to work with realtors about allowed uses.



## Existing Businessowner

- **Scenario:** Brandon, who operates a distillery downtown, is trying to connect with residents.
- Brandon is trying to figure out how to get folks to come downtown.
  - o Most of his business and the other successful downtown business does not come from town residents.
  - o Money comes from out-of-town visitors or global/online
- Has to inform partners that this is an issue
- Form a cohort of businesses
  - o How to communicate with the public about downtown?
- **Persona goals:** an increase in customers that brings an increase in profit
- **Insights and opportunities:**
  - o Our downtown is experiencing a transition.
  - o A "small business growth series" can bring information about the Town, its demographics, and resources to business owners.
  - o Helping existing businesses to stay and grow is a community priority.
  - o The Chamber has been redeveloping some programs and has introduced a more affordable membership tier. The relationship between the Chamber and the Town supports connections with the business community.
- The environmental assessment can also be shared as a resource.



## Large Corporation

- **Scenario:** GlaxoSmithKline (GSK) Human Resources (HR) leader wants to work on the talent pipeline to get better talent
- **Journey:**
  - o Meet internally with HR team to review current efforts and identify unfilled needs
  - o After internal review, perform a market analysis on those positions.
    - What is the average wage?
    - Is occupation growing or declining?
  - o Explore external partnership opportunities
    - It may be confusing to navigate all the institutions in the area
  - o Implement new programs



- **Insights and Opportunities:**
  - o Having a liaison to the institutions in the area would be very helpful.
    - This also promotes the Town as a partner.

## Thoughts and Reactions to Empathizing and Journey Mapping

- We should prioritize clients' perspectives as we develop the plan.
- We can implement some ideas quickly, such as a "one-stop-shop" resource or a small business series. These are low-cost entry items that have immediate value.
- Recognize the personal investment and frustration of entrepreneurs.
- Consider a liaison for housing challenges, promoting proactive measures over reactive responses.
- We do not have the staffing to be all things to all people.
  - o How do you build on partnerships and connections to be the navigator but not the service provider?
  - o Our community is asset-rich.
- Highlight collaborations such as last year's NCSU/IBM design thinking course focused on the principles of Zebulon's Vision 2030 Strategic Plan.
- Address concerns about lack of cohesion among separate entities, such as Zebulon Downtown Arts Council, the business community, and the Chamber of Commerce.
- Discuss the need for change to facilitate connections; explore Main Street Program as a catalyst for downtown.
- Propose ideas like micro-commercial integration in residential areas and mixed-use zoning to reduce traffic

## NEXT STEPS AND WRAP UP

The next steps for the second phase of stakeholder engagement include:

- The Economic Development Workgroup will hold three 60-minute virtual sessions to develop and propose vision themes for economic development in the Town of Zebulon.
- Draft focus areas and key priorities within each focus area

Fountainworks thanked participants for their time and energy and Shannon adjourned the meeting.

# COMMUNITY WORKGROUP MEETING SUMMARIES

## MEETING 1

### Welcome & Ideal Zebulon Economy in One Word

The Zebulon Economic Development Community Workgroup held its first meeting on Wednesday, February 7, 2024 from 9:00 AM to 10:00 AM via Zoom. The meeting was professionally facilitated by Julie Brenman and Drew Finley of Fountainworks, a public sector- focused consulting firm. The Workgroup agreed to the following ground rules for its future meetings:

- Everyone participates.
- Share the air – allow everyone the opportunity to speak and share their input.
- Own the charts – Fountainworks will be recording notes on Mural (a virtual whiteboard tool). Let Fountainworks know if the notes do not accurately reflect the content of the conversation.
- Come prepared and ready to engage.

The meeting began with a round of introductions where Workgroup members were asked to articulate one word that describes what they want the ideal Zebulon economy to look like:

- **John Saffold – Executive Director, Zebulon Chamber of Commerce**
  - One Word: *Potential*
    - Saffold added that Zebulon will not be underdeveloped.
- **Hunter Rascoe – Vice President, Design Dimensions**
  - One Word: *Strategic*
    - Rascoe added that growth is inevitable and the Town needs to be strategic about how it develops.
- **Anthony Pirrello – Executive Director, East Wake Academy**
  - One Word: *Well-developed*
    - Pirrello added that the economy must meet the needs of the people who live there and promote positive change in the community.
- **Shannon Johnson – Economic Development Specialist, Town of Zebulon**
  - One Word: *Robust*

Two Workgroup members were unable to attend, but the meeting was recorded and sent to those unable to attend this meeting.

### Where We Are & Where We Are Going

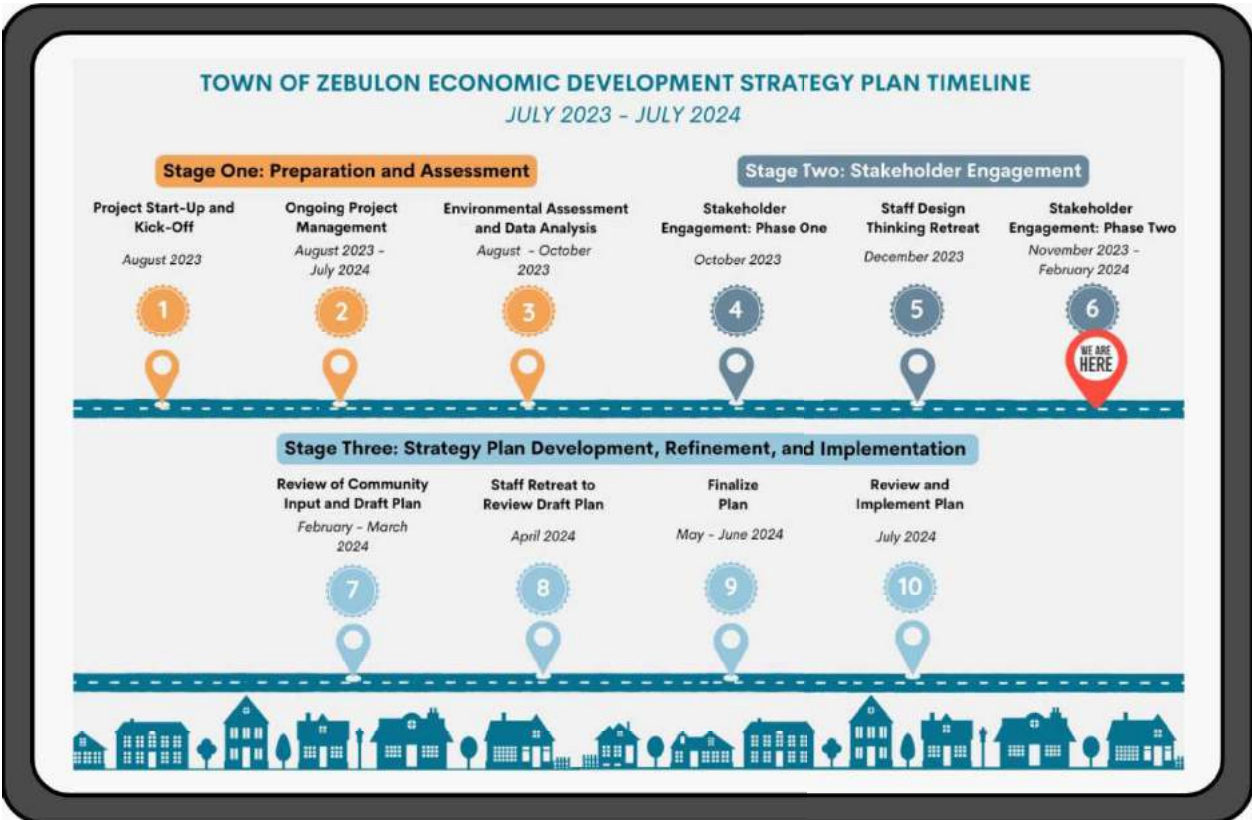
Workgroup members reviewed the work that has been completed so far on the Town's Economic Development Strategy Plan since the project's inception last summer:

- An Environmental Assessment was completed in the late Summer/early Fall of 2023.
- In the Fall of 2023, the Town conducted a community survey that received over 100 responses. The Town also held three community cafes, which were attended by 87 people. Fountainworks reviewed, analyzed, and presented the findings from these data sources to Town staff.



- In December 2023, a design thinking retreat was held with Town staff and economic development partners.
- Now, the Town has convened this Workgroup, which will meet three times over the next six weeks.

The graphic below displays the overall project timeline:



Next, the Workgroup reviewed their gameplan for the three meetings:

- **February 7 Meeting:**
  - The Workgroup will develop a shared understanding of the feedback and input received so far.
  - The Workgroup will set expectations for its meetings moving forward.
  - The Workgroup will begin developing themes based on the work completed so far.
- **February 21 Meeting:**
  - Between meetings, Fountainworks will synthesize the conversation.
  - Fountainworks will come to this meeting with proposed focus areas.
  - The Workgroup will conduct visioning for Zebulon's economy.
- **March 6 Meeting:**
  - The Workgroup will draft priorities under each focus area.

## Community Voices: Shaping What We Have Heard

Next, the Workgroup reviewed findings from the Environmental Assessment, Community Survey, and Community Cafes and responded to the questions below.

- **Were there surprises, or did these findings align with your expectations?**
  - The findings aligned with what we have heard and seen.
  - We need to ensure that there is follow-up.
- **Of the information shared, what do you see as the most pressing economic development needs in our community?**

### **Infrastructure**

- The design of infrastructure is where it all starts. The most common feedback that we receive is that traffic is a problem and will only become worse.
- A train to Raleigh and back would be ideal to provide mass transit.
- A bypass for Arendell would be ideal as well.

### **Downtown**

- The design of downtown for living and walking is important. We need to preserve the quality of life and reasons to be in downtown.

### **Growth Management**

- We need to manage expectations for development of amenities such as restaurants and entertainment with the concerns about overdevelopment and gentrification.
- There needs to be a balance – *we cannot be all things to all people.*
- There is land now, but it is a limited resource.
- We need to think regionally.
- We do not want to be a bedroom community.
- A place where people live, play, are educated, and work is a vibrant community

### **Business Recruitment & Retention**

- We need to expand the tax base beyond the primary tax contributors (U.S. Foods, G.S.K. etc.)
- We need to have purpose and intentionality around locating businesses.
- Follow up is critical!
- Community leaders need to start working together and stop jockeying for positions.

- **What do you perceive as Zebulon's strengths in terms of economic development?**

### **Partnership Opportunities**

- Wake Technical Community College (Wake Tech) is an asset for job force training.
- We can leverage the complementary businesses to what we already have here.
- The stronger working relationship between the Chamber of Commerce and the Town is an asset.
- We should tap into the strengths of existing organizations.
- We need to leverage the Chamber of Commerce as a resource.

### **Five County Stadium**

- The Five County Stadium is an asset that can be redeveloped with the departure of the Mudcats. Redevelopment could take the form of an entertainment district. The stadium has great highway access and serves as a central convergence point.
- The Five County Stadium is a gateway that serves eastern North Carolina and connects directly with the Triangle.

### **Town Size & Location**

- Zebulon's size is an asset. We are not too big, but we are not too small.

- Zebulon’s unique location is an asset.
- We need to recruit industry and consider the suppliers needed to support those industries.
- **How can we leverage your expertise to add depth to the existing information? Were there any themes you saw that you would like to expand upon?**
  - We can educate community members on the types of jobs that are here. Some people are not aware of the various jobs that are available to them.
  - We can leverage various organizations to work together.

The Workgroup then offered their thoughts on what the identity of Zebulon’s economy might look like. They reiterated that Zebulon cannot be all things to all people and needs to commit to being one type of community. They noted that the regional approach seems promising and there is a potential for marketing efforts to support that approach. The Workgroup reaffirmed that they do not want Zebulon to just be a bedroom community. They also stated that they want Zebulon to be an affordable (but not cheap) place to live. The desire to be all things to all people has contributed to traffic problems, and a task force could potentially be formed to analyze this issue.

## Next Steps

Fountainworks reminded the Workgroup that their ideas will be synthesized and proposed focus areas will be shared in preparation for the next meeting. Workgroup members were also tasked with a short assignment. Fountainworks encouraged them to ask the following question when they are out in the community: *What is the identity you want to see for Zebulon's economy?*

The meeting then adjourned. The next meeting will be held on February 21.

# MEETING 2

## Welcome, Recap, & the Road Ahead

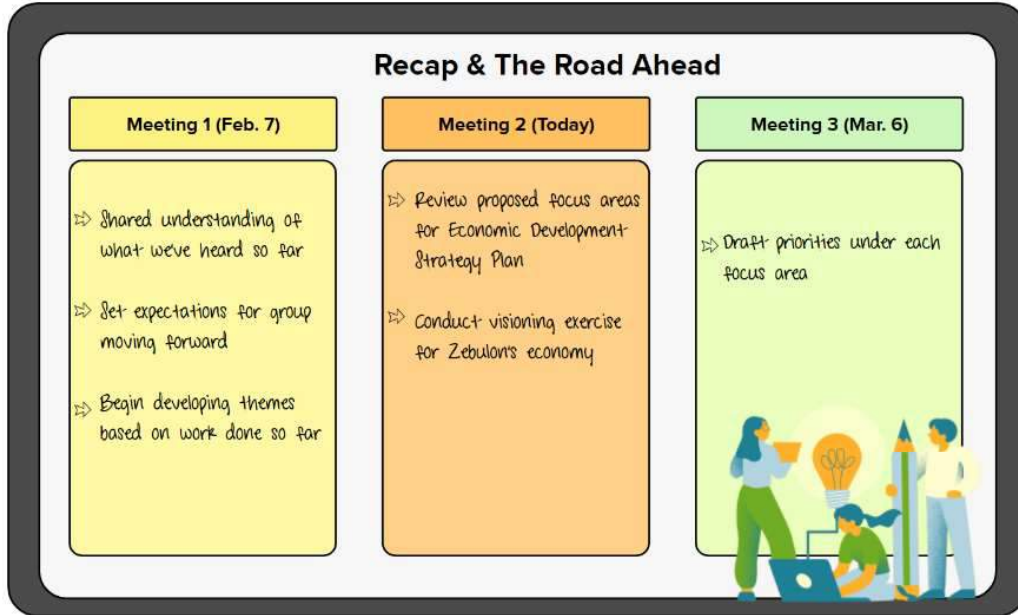
The Zebulon Economic Development Community Workgroup held its second meeting on Wednesday, February 21, 2024 from 9:00 AM to 10:00 AM via Zoom. The meeting was professionally facilitated by Julie Brenman and Drew Finley of Fountainworks, a public sector-focused consulting firm. The Workgroup is comprised of five members, one of whom was unable to attend. Shannon Johnson is the Town’s representative on the Workgroup.

The meeting began with a brief review of the one word that Workgroup members articulated that describes what they want the ideal Zebulon economy to look like.

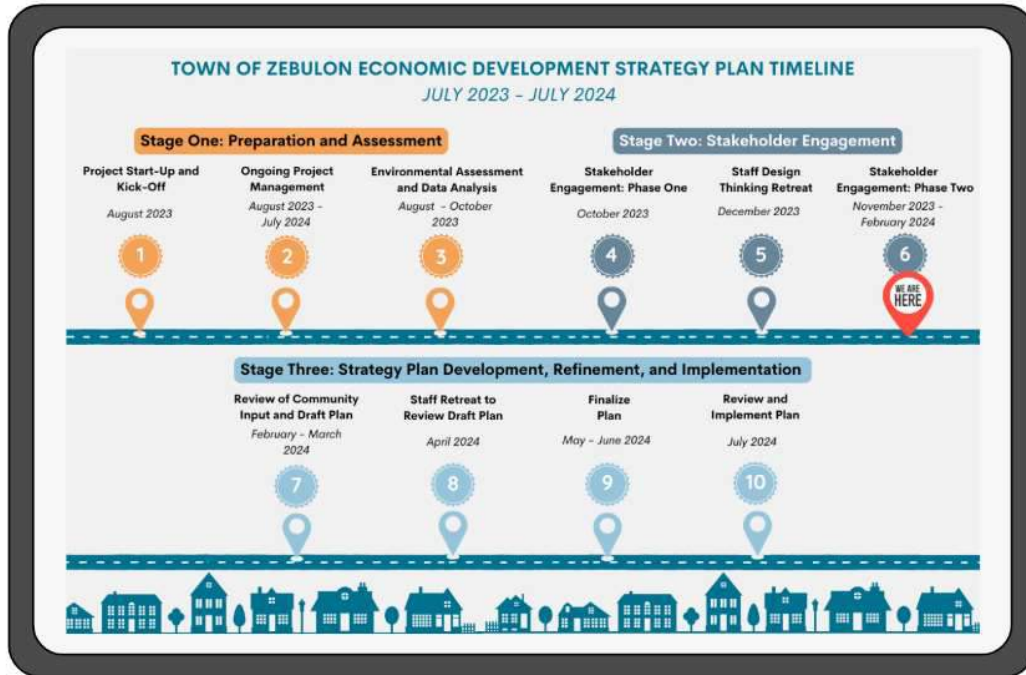
- **John Saffold – Executive Director, Zebulon Chamber of Commerce**
  - One Word: *Potential*
    - Saffold added that Zebulon will not be underdeveloped.
- **Anthony Pirrello – Executive Director, East Wake Academy**
  - One Word: *Well-developed*
    - Pirrello added that the economy must meet the needs of the people who live there and promote positive change in the community.
- **Jennifer Williams – Board Chair, Zebulon Chamber of Commerce**
  - One Word: *Boastful*
- **Brian Bullock – Local Developer**
  - One Word: *Deliberate/Intentional*

- Bullock noted that follow-up and follow-through are key.
- **Hunter Rascoe - Vice President, Design Dimensions**
  - One Word: *Strategic*
    - Rascoe added that growth is inevitable and the Town needs to be strategic about how it develops.
- **Shannon Johnson - Economic Development Specialist, Town of Zebulon**
  - One Word: *Robust*

The Workgroup then reviewed the work they have accomplished so far and looked ahead to the work that will be completed over the next several weeks:



Workgroup members also briefly acknowledged how their work fits into the bigger picture of the ongoing work that has taken place to develop Zebulon's Economic Development Strategy Plan:



## Review of Proposed Focus Areas

The Workgroup’s major agenda item was a review and discussion of the proposed focus areas that Fountainworks prepared for the Economic Development Strategy Plan. Fountainworks synthesized the insights from the Workgroup’s first meeting and developed five proposed focus areas for the plan based on the Workgroup’s direction. These five proposed focus areas, along with a brief description for each, are included below:

- Economic Readiness** – This focus area affirms that the Town’s infrastructure will be well-suited to accommodate the anticipated growth that is expected to occur in and around Zebulon and establishes that this growth will be smart and focused on prudent land use and avoiding overdevelopment.

*Infrastructure*

  - Continue efforts to address and alleviate traffic congestion
  - Advocate for transportation improvements such as highway bypasses and mass transit options like passenger rail service
  - Maintain a viable water and sewer utility system and extend utility service to growth areas

*Smart Growth*

  - Develop the Town’s land in a prudent manner that acknowledges land as a limited resource
  - Avoid overdevelopment and the temptation for Zebulon to be all things to all people
- Support for Businesses** – This focus area is about Zebulon’s commitment to supporting businesses of all types and sizes (new and existing businesses, large industries, and small businesses) through fostering entrepreneurship, streamlining processes, and enhancing business recruitment and retention efforts.

*Foster Entrepreneurship*

- Support entrepreneurial initiatives through partnerships with community stakeholders such as the Innovation and Entrepreneurship Program at North Carolina State University

*Streamline Processes*

- Create a business-friendly environment by streamlining processes such as development plan review

*Business Recruitment & Retention*

- Adopt a regional approach to business recruitment and retention by tapping into the strengths of existing organizations
- Expand the Town's tax base beyond the Town's primary tax contributors
- Bring community leaders together to develop a purposeful and intentional strategy for locating businesses

- **Key Economic Growth Districts** – This focus area highlights two specific districts in Zebulon that are ripe for economic investment: Downtown and the Five County Stadium.

*Downtown Zebulon*

- Preserve and enhance the quality of life and reasons to be in Zebulon's downtown

*Five County Stadium*

- Pursue redevelopment efforts for the Five County Stadium such as an entertainment district
- Leverage the Five County Stadium's location as a central convergence point that serves Eastern North Carolina and connects directly to the Triangle region

- **Inclusive Economy** – This focus area is about cultivating an inclusive economy that provides access to high-quality jobs and amenities while mitigating risks of displacement and gentrification.

*Access to High-Quality Jobs & Amenities*

- Support workforce development in and around Zebulon by ensuring access to well-paying and high-quality jobs with expanded career opportunities
- Provide access to high-quality amenities such as shopping and entertainment
- Recognize that Zebulon cannot be all things to all people and that some community assets may not need to be located within the Town itself

*Mitigating Displacement & Gentrification*

- Adopt strategies that actively work to ensure that longtime residents are not displaced or priced out of Zebulon

- **Leverage Regional Assets** – This focus area puts forth a commitment to leveraging regional assets that exist in Zebulon's economy and acknowledges that the Town cannot be all things to all people.

*Wake Technical Community College (Wake Tech)*

- Maintain and strengthen partnerships with Wake Tech

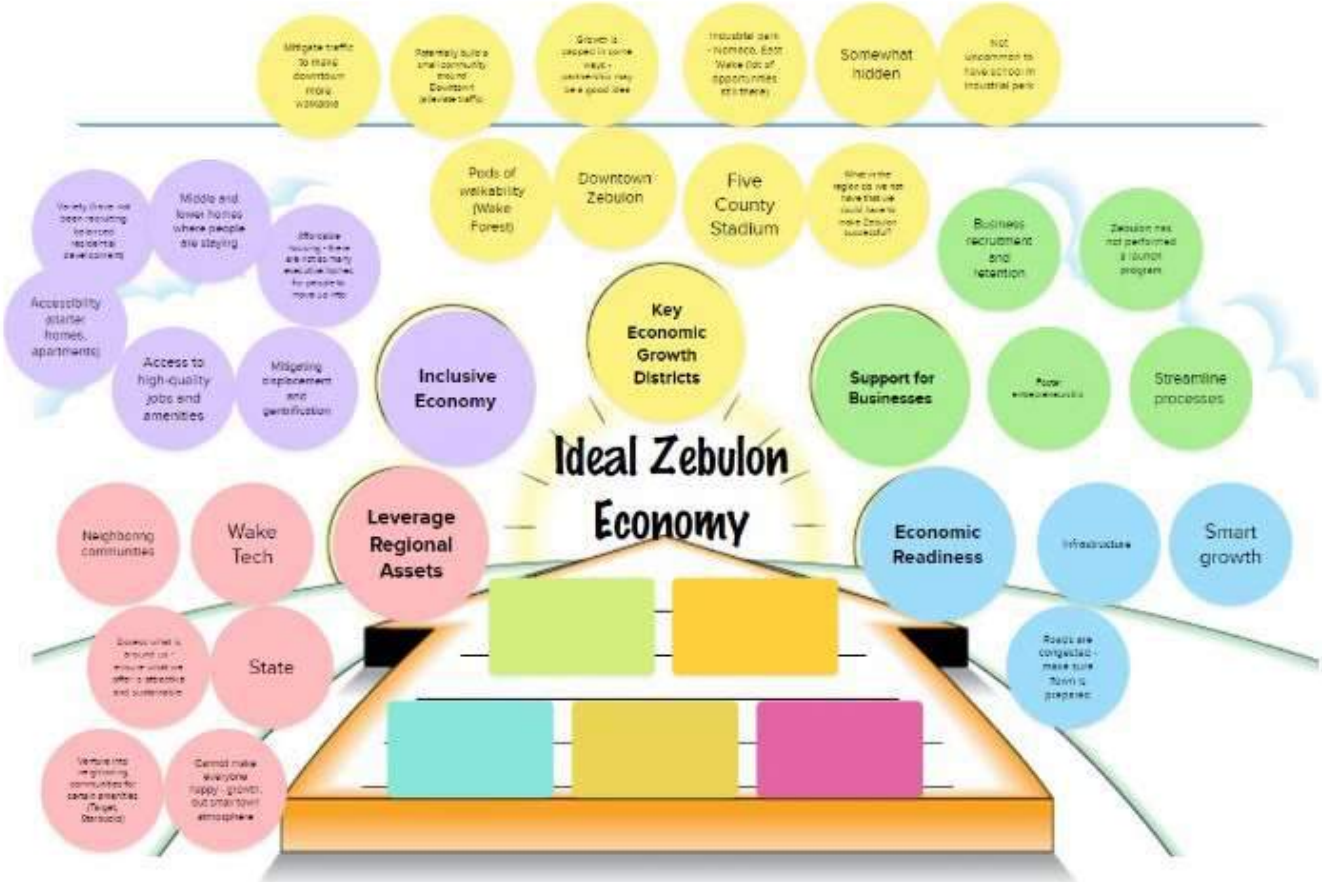
*Neighboring Communities*

- Collaborate with Wake County and neighboring communities to attract amenities and ensure regional access

*State Economic Development Support*

- Utilize economic development support from the State of North Carolina to promote regional economic growth

The image below depicts the graphic recording of the Workgroup’s conversation:



The Workgroup discussed each focus area one by one and added more detail to further shape the focus areas. Below are the details the Workgroup added to the proposed focus areas, which is the same content shown in the image above:

**Economic Readiness**

- The roads are congested, so the Town needs to ensure that it continues to work on alleviating traffic congestion to accommodate anticipated future growth.

**Support for Businesses**

- One Workgroup member noted that Zebulon is one of the few municipalities in the area that has not performed a Launch program. Other programs in the region such as [LaunchRALEIGH](#) and [LaunchKNIGHTDALE](#) can serve as potential exemplars for Zebulon to consider.

**Key Economic Growth Districts**

- The question that needs to be considered is as follows: what assets in the region do we not have that would make Zebulon more successful?

- There are a lot of opportunities for the industrial park where Nomaco and East Wake Academy are located.
- The Town should continue to mitigate traffic to make downtown more walkable.
  - A small community built around downtown could help to alleviate traffic.
  - Zebulon should work to create “pods of walkability” similar to those that exist in Wake Forest.
- A partnership of some kind may be an effective growth strategy.

### **Inclusive Economy**

- Housing is an important topic to include in this focus area.
  - There needs to be sufficient *affordable housing* and *workforce housing* in Zebulon.
  - There are not as many executive homes for folks to move into once they are able to afford them. People are staying in middle-tier and lower-tier homes.
  - Housing *variety* is important. The Town needs to a better job of recruiting balanced residential development.
  - Housing *accessibility* is important as well. Zebulon needs to have a sufficient number of apartments and starter homes.

### **Leverage Regional Assets**

- Zebulon residents may need to venture into neighboring communities for certain amenities such as big box stores and large retailers.
- We cannot make everyone happy. We want growth, but we also want to retain our small-town atmosphere.
- We need to assess what is around us and make sure that what we offer is attractive and sustainable.

## **Visioning: The Identity of Zebulon’s Economy**

The workgroup then conducted a short visioning exercise. This exercise focused on the following question:

*What is the identity you want to see for Zebulon’s economy?*



The image below displays the highlights from this segment:



The content from the image above is displayed below. Fountainworks grouped this content into three themes:

*Future Zebulon Economy*

- Zebulon is part of a regional economy.
- Zebulon has a small town feel with a big town economy.
- Zebulon should use its location as a central convergence point to its advantage.

*Developing the Identity of Zebulon's Economy*

- Zebulon should leverage its history and agrarian roots.
- Zebulon needs a commitment from developers to help drive what the Town will become. Community leaders need to think about the following question: when developers ask who we are, what do we say?

*The Identity of Zebulon's Economy in Practice*

- Zebulon needs more restaurant options and more events in downtown.
- Zebulon needs affordable housing, but not just affordable housing. Zebulon also needs executive housing and a balanced mix of high-quality housing options.

Workgroup members noted that stratifying existing data may help them better understand the viewpoints of various demographic groups. New data that builds on the findings gathered from the community cafés would also be beneficial.

## Next Steps & Wrap Up

To conclude the meeting, the Workgroup reviewed next steps:

- The Workgroup’s final meeting will be held on March 6.
- Fountainworks will send a summary of this meeting – *Done*
- Fountainworks will create an initial draft of the vision for Zebulon’s economy, which the Workgroup will review at its final meeting.
- Fountainworks will draft priorities under each focus areas for the Workgroup to review at its final meeting.

The meeting then adjourned.

## MEETING 3

### Welcome & Recap

The Zebulon Economic Development Community Workgroup held its third and final meeting on Wednesday, March 6, 2024 from 9:00 AM to 10:00 AM via Zoom. The meeting was professionally facilitated by Julie Brenman and Drew Finley of Fountainworks, a public sector-focused consulting firm. The Workgroup is comprised of five members, one of whom was unable to attend. Shannon Johnson is the Town’s representative on the Workgroup.

The meeting began with a recap of the Workgroup’s focus question:

What is the identity you want to see for Zebulon’s economy?

### Visioning for Zebulon’s Economy

The Workgroup then reviewed two proposed vision statements. After discussion, Workgroup members settled on their preferred vision statement, which is shown below:

Zebulon will foster an inclusive, vibrant, diverse, and sustainable economy. Zebulon will be a regional player that prioritizes intentional and responsible growth while retaining the Town’s unique charm and character.

One version of the vision statement included the word “smart” when referring to growth. The Workgroup decided to replace “smart” with “intentional” in an effort to make the vision clearer to the public. The term “smart growth” has a specific meaning in the city planning profession that members of the general public may not necessarily recognize.

Workgroup members offered two additional thoughts when discussing the vision:

- One Workgroup member noted that now is the time for Zebulon to grow in a way that works for the next thirty years, and not just the next thirty days.
- The same Workgroup member noted that including affordable housing within the components of the vision makes sense, but that Zebulon already has a good amount of affordable housing stock right now.

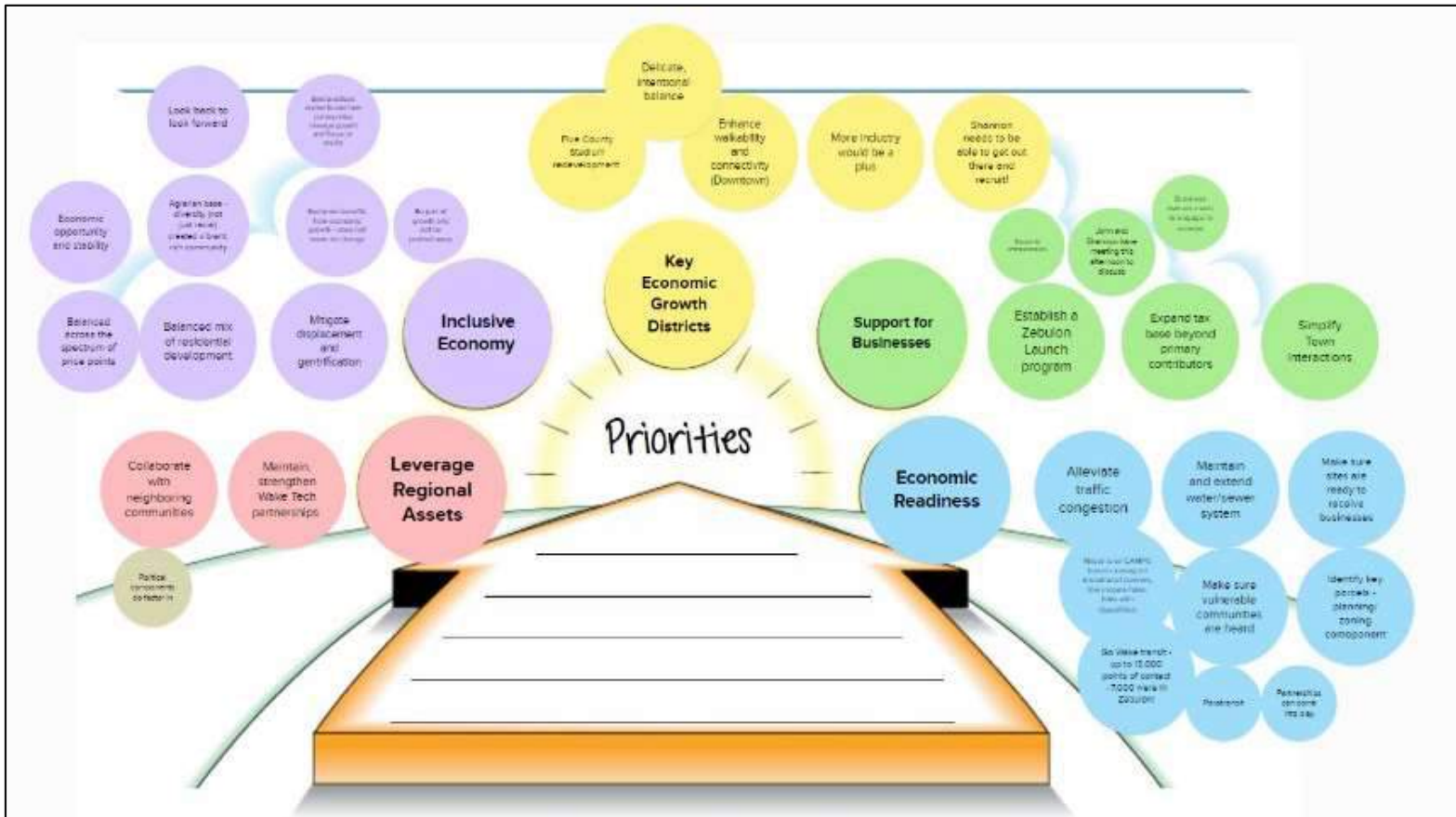
Another Workgroup member asked about how the vision statement fits into the overall plan development process. Fountainworks noted that the vision statement is aspirational and describes a desired future state of affairs. The vision statement is part of the Economic Development Strategy

Plan itself, which will ultimately be presented to the Town Board of Commissioners and available on the Town’s website. Town staff will hold a retreat in April and work with Fountainworks to refine the plan. A community storyboard will also be created as an outreach tool that will inform the public about the plan and its purpose. The plan will include an implementation component that will outline an annual reporting process to keep the public informed of the plan’s progress.

Shannon Johnson then added some additional detail from the Town’s perspective. She stated that the vision statement guides the activities in the plan and helps staff prioritize. If an activity does not align with the vision statement, then it will not be prioritized. This approach allows Town staff to appropriately allocate time and resources towards economic development efforts.

## Review Proposed Priorities for Each Focus Area

The Workgroup then reviewed proposed priorities for each of the five focus areas of the plan:



Priorities are included for each focus area. The descriptions below outline each priority for each focus area along with the Workgroup’s reflections on these priorities:

### Leverage Regional Assets

- *Collaborate with neighboring communities*
  - One Workgroup member noted that political elements factor into this effort.
- *Maintain and strengthen partnerships with Wake Tech*

### Inclusive Economy

- *Ensure a balanced mix of residential development across all price points*

- *Pursue strategies to mitigate displacement and gentrification*
  - One Workgroup member asked for clarity on what this priority aims to achieve. Fountainworks noted that mitigating displacement and gentrification is about making sure that everyone benefits from economic growth and the changes that occur as a result of it.
  - Another Workgroup member added that this priority focuses on economic opportunity and economic stability. He noted that the agrarian base of many towns has created vibrant and rich communities that are diverse (not solely in the racial sense of the word). Looking back to look forward is sometimes necessary.
  - Shannon Johnson observed that mitigating displacement and gentrification is about ensuring that all residents remain part of the Town's growth and are not pushed away from it. The best practices review that took place as part of developing the plan will help the Town learn from communities that have managed growth well and maintained an enduring focus on equity.

### **Key Economic Growth Districts**

- *Pursue efforts to redevelop the Five County Stadium*
  - A Workgroup member noted that Shannon and the Town's economic development staff need to be able to actively recruit and pursue industries and not simply wait for those industries to come to them.
  - Another member echoed this point and said that more industries in Zebulon would definitely be ideal.
  - One Workgroup member noted that this process requires a delicate and intentional approach.
- *Enhance walkability and connectivity, particularly in Downtown Zebulon*
- *The workgroup asked staff to consider addressing and growing industrial areas as another activity.*

### **Support for Businesses**

- *Establish a Zebulon Launch program.*
  - One Workgroup member noted that Launch programs are about supporting local entrepreneurs and informed the Workgroup that he has a meeting with Shannon Johnson this afternoon to discuss this effort.
  - The same Workgroup member noted that it is important for local businesses to engage with and respond to surveys they receive.
- *Expand the Town's tax base beyond the primary tax contributors*
- *Simplify and streamline interactions with Town staff*

### **Economic Readiness**

- *Alleviate traffic congestion*
  - A Workgroup member highlighted that Zebulon Mayor Glenn York currently serves on the Executive Board of the Capital Area Metropolitan Planning Organization (CAMPO). He noted that CAMPO is conducting a micro-transit survey that is focusing on seniors, low-income individuals, and those with disabilities. He added that GoWake, a program

that provides door-to-door shared ride transportation services, received 13,000 points of contact and that 7,000 of those were from Zebulon residents.

- Another member added that GoWake is a form of paratransit, which can be described as a type of transportation service that supplements fixed-route mass transit by providing individualized rides without fixed routes or timetables. He noted that partnerships can often come into play with paratransit initiatives and that it is important to make sure that the vulnerable voices in the community are heard.
- *Maintain and extend water and sewer systems to ensure sites are ready to receive businesses*
  - One Workgroup member emphasized that identifying key parcels is an important element of this process. The Town should ensure that its planning and zoning processes coincide with efforts to extend utilities.

## Next Steps

The meeting concluded with a brief review of next steps:

- Fountainworks will send a summary of this meeting – *Done*
- Fountainworks will use the insights gleaned from the three Workgroup sessions to help shape the Economic Development Strategy Plan.
- Fountainworks will work with Town staff to refine and finalize the plan over the next several months.

The meeting then adjourned.

STAFF REPORT  
FIRE CONTRACT AMENDMENT  
WITH WAKE COUNTY  
AUGUST 5, 2024

**Topic: Fire Contract Amendment with Wake County**

Speaker: Chris Perry, Fire Chief  
From: Chris Perry, Fire Chief  
Prepared by: Chris Perry, Fire Chief  
Approved by: Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

Consideration of approval of the contract amendment for fire services with Wake County.

**Background:**

Since 2000, the Town of Zebulon has contracted with Wake County to provide fire services to the unincorporated areas around the corporate limits of Zebulon. The contract includes provision of fire and medical first responder services.

The current agreement for fire protection services expires June 30, 2025. This amendment was initiated by County staff to outline three contract changes:

- 1) To modify the funding methodology which the County uses to share costs of apparatus and vehicles, from a reimbursement format to an annual contribution format; and,
- 2) To payoff the existing debt owed by the County to the Town on existing vehicles; and,
- 3) To update language relative to the effect of future fire stations on cost share.

**Discussion:**

Adopting the contract allows the Town greater flexibility in vehicle purchasing and clarifies metrics utilized to determine cost share percentage when future facilities are constructed.

**Fiscal Analysis:**

Through this contract, Wake County shares costs of operational and capital fire expenses, per the established cost share formula. For FY25, Wake County's cost share is proposed at 35.76%, based upon the funding methodology, which is the same formula as utilized in the past years. Approval of this contract continues our cost-share arrangement. Non-approval of the contract results in the Town bearing sole responsibility for financing fire protection, including both the operational and capital costs. Wake County total funding towards fire protection for FY25 is anticipated at \$1.4 million.

**Policy Analysis:**

N.C.G.S. 153A-233 authorizes counties to contract for firefighting or prevention services with cities or other units of local government, and further authorizes appropriation of funds not otherwise limited by law. Wake County contracts with us to provide fire protection in the unincorporated areas around Zebulon. Non-approval of this contract would necessitate that Wake County contract with another service provider to serve this area. This amendment does not change our current service delivery model, it is more administrative in nature.

**Staff Recommendation:**

Staff recommends approval of attached contract.

**Attachments:**

1. Proposed Fire Protection Contract Amendment

**SECOND AMENDMENT**

to

**FY 2023 – FY2025  
MUNICIPAL FIRE PROTECTION AGREEMENT**

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**TOWN OF ZEBULON**

This **SECOND AMENDMENT** made and entered into the 1<sup>st</sup> day of July 2024, by and between the County of Wake, a body politic and corporate of the State of North Carolina, hereinafter referred to as “**COUNTY**” and Town of Zebulon hereinafter referred to as “**TOWN**”.

**WITNESSETH:**

**WHEREAS**, the **COUNTY** and **TOWN** have an existing Fire Protection Agreement specifying services, terms and conditions under which the **TOWN** provides fire services to the **COUNTY** (“**Agreement**”); and,

**WHEREAS**, the term of said Agreement is July 1, 2022 through June 30, 2025; and

**WHEREAS**, The **COUNTY** desires to amend the Agreement to add funds approved in the FY25 adopted budget for the provision of Fire Services under the Agreement; and,

**WHEREAS**, The **COUNTY** desires to amend the Agreement to add terms related to a new option for Cost Sharing for fire fighting vehicles (“**LFFV**” and “**SFFV**”); and

**WHEREAS**, The **COUNTY** desires to amend the Agreement to add terms related to new station construction; and

**WHEREAS**, the **TOWN** has accepted these amended terms and is desirous of a continued relationship with the **COUNTY** to provide fire services.

**NOW, THEREFORE**, for and in consideration of the premises and other good and valuable considerations, the receipt and sufficiency of which are hereby acknowledged, **COUNTY** and **TOWN** amend the Agreement as follows:

1. *Recitals/Capitalized Terms.* The foregoing recitals are made a part of this Amendment and are incorporated herein by reference. Capitalized terms used in this Amendment and not otherwise defined shall have the meanings ascribed to such terms in the Agreement.

2. *Specific Amendments.* The Agreement is hereby amended as follows:

(a) *Cost Share.* Section 16 of the Agreement is amended to add the following section:

16.9.1.9. Starting with the FY 24 Fire Tax District Budget process, as an alternative to 16.9.1.5 and 16.9.1.6 herein, any Town traditionally paying cash for

apparatus may instead opt to enter a new apparatus agreement with the County for all of the Town's LFFV and SFFV upon the following conditions:

- a. Town receives an annual capital apparatus payment based on predicted modeled cost of apparatus with yearly adjustments on cost share percentage (The updated cost share % and annual payment will be provided and mutually agreed upon during the budget process each year).
- b. Town may purchase apparatus on the Town's timeline instead of the County's apparatus schedule.
- c. All Apparatus from the Town shall be removed from the County's apparatus replacement schedule.
- d. County shall pay for 100% of the cost of brush trucks and tankers.
- e. Agreement shall encompass all large firefighting vehicles and small firefighting vehicles including administrative vehicles.
- f. Town cannot switch back to the old system after the new apparatus agreement is established.
- g. When the Town sells each LFFV and SFFV at its end of useful life, the County shall receive the cost share percentage of the sale, which shall be based on the sale in the year that the vehicle was purchased.
- h. All apparatus must be insured in accordance with the requirements set forth in Section 17.4 of the Agreement.

(b) *Apparatus Payoff.* The town will invoice the County in FY25 for the total amount owed for any LFFV and SFFV debt. The amount currently owed by the County to the Town is \$201,698. This payment would clear any County commitments to the Town in relation to LFFV and SFFV.

(c) *New Station Construction.* Starting with the FY 25, Section 16.9.2 New Station Construction, shall include:

- a. The final cost share determined percentage will be calculated utilizing the cost share metrics that are applicable to that station's coverage area based upon the most recent 6-month period that is calculated in either January or July of the calendar year.
- b. The new calculated percentage shall not move plus or minus more than 5% from the original calculated percentage that was determined during the initial request and memorialized in a Memorandum of Agreement.

3. *Affirmation of Agreement Terms.* Except to the extent herein revised, modified or amended, all terms, conditions and provisions of the Agreement are hereby affirmed and ratified in all respects, and shall remain in full force and effect.

4. *Counterparts.* This Amendment may be executed in any number of counterparts and all so executed shall constitute one agreement binding on the Parties, notwithstanding that not all Parties have signed the same counterpart.



IN WITNESS WHEREOF, the parties hereto have executed this Amendment on the day and year first above written.

**THE COUNTY OF WAKE**

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

Title: Director of Fire Services & Emergency Management

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

\_\_\_\_\_  
**FINANCE DIRECTOR**

The person responsible for monitoring contract performance requirements is: Joseph Vindigni

\_\_\_\_\_ Department Head Initials

**TOWN OF ZEBULON**

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

Title: Mayor

STAFF REPORT  
FIRE CONTRACT RENEWAL  
WITH JOHNSTON COUNTY  
AUGUST 5, 2024

**Topic: Fire Contract Renewal with Johnston County**

Speaker: Chris Perry, Fire Chief  
From: Chris Perry, Fire Chief  
Prepared by: Chris Perry, Fire Chief  
Approved by: Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

Consideration of approval of the contract of fire services with Johnston County.

**Background:**

Since April 2014, the Town of Zebulon has contracted with Johnston County to provide fire services to a small portion of their county. Johnston County desires the Town of Zebulon to provide these services due to our proximity to this area as compared to any Johnston County fire station. Contracting with the Town of Zebulon provides for a quicker response and increased insurance savings for these properties.

The current agreement for fire protection services covered a period through June 30, 2024. Near the end of June, Johnston County provided a new agreement for an additional year, expiring June 30, 2025. Primarily, changes within the contract related to Johnston County's change from individual tax districts to a single, county-wide tax. This arrangement, similar to that used in Wake County, allows Johnston County to distribute funding as needed across the county.

**Discussion:**

The discussion before the Board is to approve or deny the attached contract to provide fire protection services.

**Fiscal Analysis:**

For this past fiscal year (July 1, 2023 – June 30, 2024), the fire department responded to twenty-nine incidents in the contract area. Contract revenue from Johnston County for this period was \$18,119.67.

With this new contract and funding methodology, the projected tax revenue is \$29,000 per year. This amount is sufficient to cover associated costs with the responses generated in the contract area.

**Policy Analysis:**

N.C.G.S. 153A-233 authorizes counties to contract for firefighting or prevention services with cities or other units of local government, and further authorizes appropriation of funds not otherwise limited by law. The changes to this contract are administrative in nature and do not affect service delivery.

**Staff Recommendation:**

Staff recommends approval of attached contract.

**Attachments:**

1. Fire Services Contract



**NORTH CAROLINA  
JOHNSTON COUNTY**

**INTERLOCAL AGREEMENT FOR PROVISION OF FIRE PROTECTION SERVICES**

This Agreement (sometimes referred to as "Contract"), made and entered into this the first day of July, 2024, by and between County of Johnston, a political subdivision of the State of North Carolina, hereinafter referred to as the "County," and the Town of Zebulon, a body politic and corporate of the State of North Carolina, hereinafter referred to as the "Town" or "Contractor";

WHEREAS, the Town and the County are authorized pursuant to N.C. General Statute § 160A-460, *et seq.*, to enter into an interlocal agreement; and

WHEREAS, the Town and the County wish to enter into such an agreement by which the County will assess and collect a special fire tax and the Town will provide certain fire protection services as described herein.

Now therefore, in consideration of the mutual promises contained herein and other good and valuable consideration, the parties hereto contract and agree as follows:

- 1) The County agrees that it will cause to be assessed or levied a special fire tax within statutory limits and will collect said fire tax on an ad valorem basis on property within the Wakelon Fire Insurance District (hereinafter the "District").
- 2) The Town shall submit in writing to the Johnston County Fire Marshal an adopted budget approved by the Town by the established deadline each year.
- 3) "Fire Department" as used herein refers to the Town, acting by and through its Fire Department.
- 4) Funds collected by the County as a result of said special fire tax shall be distributed to the town in accordance with the approved Corinth-Holder Fire Service District rate for FY24 levied per hundred dollars valuation of all real property in the Wakelon Fire Insurance District, and the provisions established by the Johnston County Finance Office. Real property values will be provided by the Johnston County GIS department and shared with the Finance Office.
- 5) Fire Protection Service District (N.C. General Statute 153A-301) funds levied and collected by the County and paid to the Fire Department by the County shall be used exclusively for fire department operations to provide fire protection and emergency services in the District, whether within or outside the Town's corporate boundaries, and other areas of response as dispatched and to meet the standards established by this Agreement.
- 6) The Fire Department will furnish fire protection and related emergency services pursuant to the standards set forth by the North Carolina Department of Insurance, County, and all other pertinent federal, state, and local laws and regulations within the Fire District (sometimes referred to herein as "primary service area") and shall provide the necessary equipment, personnel, and those things necessary for furnishing such protection in the District. The District is defined in the map of the Fire Insurance District on record with the Clerk to the



Johnston County Board of Commissioners and in the GIS/Land Records Management of Johnston County. The services shall be in accordance with minimum standards set forth in this Agreement and all future amendments adopted in accordance with paragraph 19 of this Agreement. The Fire Department shall furnish said fire protection without charge to all persons and property located in the District in an efficient and competent manner. This provision shall not prohibit the Fire Department from recouping costs and expenses from incidents or from entering into contracts with the Federal, State, or local governments or utility companies for the provision of emergency protection services for a fee, or from applying for and/or receiving any donations, grants, or contributions of any kind, whether governmental or private.

- a. The Fire Department shall provide fire protection and related emergency services from the following location(s); having been inspected by the North Carolina Office of State Marshal and determined to meet or exceed the minimum requirements for a rated and certified district:
    - i. Station 1
      - 113 E Vance St, Zebulon, NC 27597
- 7) Fire Department agrees that County has the right to inspect all books and accounts of Fire Department upon reasonable prior notice to Fire Department. Said inspection shall be conducted by the Johnston County Board of Commissioners through the Johnston County Fire Marshal, the Johnston County Finance Officer, or other designees of the Johnston County Board of Commissioners. The Fire Department shall furnish all applicable materials and financial statements for the purpose of the annual audit conducted by the Town in conformity with General Accepted Accounting Principles or other comprehensive basis of accounting. The Town shall follow the applicable statutory procedures for letting of public contracts for fire apparatus, equipment, and construction as may be amended by the North Carolina Legislature from time to time. Fire Department shall maintain an accurate inventory of any property with a purchase price of \$5,000.00 or greater purchased in whole or in part with County Fire District funds for the purpose of providing and furnishing fire protection services to the Fire District pursuant to this Agreement.
- 8) If any condition of this Agreement is not being fulfilled by Fire Department to the satisfaction of County, in County's sole discretion, the Johnston County Finance Officer has the right to withhold any and all funds to be paid to Fire Department under this Agreement at any time and until such time as the Fire Department complies with the terms of this Agreement. If Fire Department refuses or fails to provide fire protection services, facilities, or functions as contemplated under this Agreement and to the sole satisfaction of County, the Johnston County Fire Marshal shall investigate the cause of said refusal or failure. During the investigation by the Johnston County Fire Marshal, County may withhold any and all funds due and payable to Fire Department. If the investigation by the Johnston County Fire Marshal determines that Fire Department has refused or failed to perform the duties and obligations of it as required herein, and certifies the results of the investigation to the County Manager, the County Manager may instruct the Finance Officer to withhold any and all funds to be aid to Fire Department under this Agreement until a resolution regarding the refusal or failure to perform is reached by the parties. If a resolution is unable to be reached by the parties, County, in its sole discretion, may withhold any and all funds to be paid to Fire Department under this Agreement, terminate this Agreement for cause, or take any other such action as County deems necessary to protect the citizens of the District. Fire Department's failure to file reports required of it to any Federal, State, or local authority shall



be grounds for County to terminate this Agreement with Fire Department for cause. If this Agreement is terminated by County for cause, Fire Department shall be liable to County for any and all funds appropriated and paid to Fire Department during the fiscal year in which the termination occurs. Additionally, Fire Department shall not be relieved of its obligations to County under paragraph (7) of this Agreement. Nothing herein shall affect Fire Department's ultimate rights to payments, or County's responsibility for payments, as outlined herein for services actually rendered by Fire Department prior to the effective date of any termination. Nothing herein shall prevent County and Fire Department, in the event of a termination of this Agreement for any reason, from entering into an agreement to provide services beyond the effective date of any such termination.

- 9) The Fire Department shall obtain and keep in force during the term of this contract the following minimum insurance coverage:
  - a. Worker's Compensation: Coverage for all paid and volunteer workers meeting the statutory requirements of the State of North Carolina;
  - b. Comprehensive General Liability, Malpractice, and Errors and Omissions: Coverage with minimum limits of \$1,000,000.00 per occurrence, \$1,000,000.00 aggregate combined single minimum for bodily injury liability and property damage liability;
  - c. Business Auto Policy: Coverage with minimum limits of \$1,000,000.00 per occurrence combined single limit for bodily injury liability and property damage liability. This shall include owned vehicles, hired, and non-owned vehicles and employee non-ownership.
  - d. Management or Directors and Officers Liability: Coverage with minimum limits of \$1,000,000.00 per claim and \$2,000,000.00 aggregate.
  - e. Umbrella Liability: Coverage with a minimum limit of \$1,000,000.00 with underlying coverage of auto liability, general liability, employer's liability, and \$1,000,000.00 aggregate.
  - f. County as an Additional Insured: County of Johnston shall be named as an additional insured on all policies of insurance required hereunder. Fire Department shall furnish County a certificate of insurance annually.
  - g. Indemnity Agreement: Fire Department shall and hereby agrees to indemnify and save harmless County, from any and all liability and expenses, including attorney's fees, court costs, and other costs incurred by County caused by the negligent acts or omissions of Fire Department, its volunteers, agents and employees.
  - h. Nothing contained herein shall be construed as a waiver of immunity by the County.
- 10) The Fire Department shall provide services within the District (N.C. General Statute 153A-233) and maintain a minimum of a 9S/E rating or better with the North Carolina Department of Insurance, Office of State Fire Marshal. The Fire Department, shall continuously comply with all applicable laws, ordinances, and State regulations. Fire Department shall submit to the Johnston County Fire Marshal a written plan outlining how it will maintain or upgrade its current insurance rating when requested by the Johnston County Fire Marshal.
- 11) [Intentionally Deleted]
- 12) The Fire Department shall provide annually to the Johnston County Fire Marshal's Office a current and complete roster of members of the Fire Department to include contact numbers for the Chief and Assistant Chief(s).



- 13) The Fire Department agrees to provide automatic and mutual aid services to other emergency services providers in Johnston County. The Fire Department understands that other agencies will maintain their own liability policies and be responsible for their own expenses. The Fire Department further agrees that it will be responsible for its own expenses while responding to a request for mutual aid to another agency within the county. The current automatic aid agreement is included in Appendix A of this contract.

In areas where the fire district has been extended to six miles, the Fire Department agrees to maintain agreements with adjoining districts to respond with a minimum of one apparatus capable of transporting a minimum of 1,000 gallons of water to all alarms involving reported structure fires. This apparatus will be dispatched simultaneously with the department within whose district the incident occurs.

- 14) The Fire Department shall obtain a criminal history record check of applicants to and current members of Fire Department in accordance with N.C.G.S. Sect 143B-943 and applicable North Carolina law, as may be amended from time to time.

- 15) The following minimal performance standards are agreed upon by the County, Town, and the Fire Department and are part of this contract:

- a. The Fire Department shall comply with the procedures for radio communications and established protocols for the dispatch of emergencies as defined by the Johnston County Communications Center Protocols.
- b. The Fire Department officer in charge at all fire scenes shall attempt to determine the origin and cause of every fire. When the officer in charge cannot determine the origin and cause of the fire, or where significant injury or death occurs related to the fire, or if the cause is suspected to be of an incendiary nature, the officer in charge shall request assistance from the Johnston County Fire Marshal's Division.
- c. The Fire Department shall keep all records on site for minimum period of five (5) years. These records include all those "Records and Documents" required to be maintained in order to meet and/or retain 9S classification, as published in that memo entitled "Requirements to Meet the 9S Rating for Initial Certification/Re-Inspection of Fire Departments in North Carolina," or any superseding memorandum or directive, published by the Office of the State Fire Marshal. All State and County required reports and rosters shall be submitted by the requested deadlines.
- d. The Fire Department shall adopt a standard operating guideline that addresses the number of firefighters required on all types of fire calls. A current, valid copy of the Contractor's guideline shall be kept on file with the Johnston County Fire Marshal. The Fire Department shall place at least four (4) personnel on the scene to operate at least one (1) pumper on all structure fire calls.
- e. The Fire Department shall have the minimum standard training requirements, as established by the State of North Carolina, for providing fire, rescue, and emergency management services. The Fire Department shall maintain training levels in accordance with National Incident Management System (NIMS) directives.



- f. The Fire Department shall participate in at least two (2) or more county wide mutual aid trainings each year.
- g. The Fire Department shall develop a pre-fire incident survey and update it annually for all commercial buildings within the Fire Protection Service District. Facilities that should be given priority are those buildings displaying NFPA 704 placards, as well as hazardous, institutional, and assembly occupancies. The Fire Department agrees to cooperate with local fire code enforcement officials to determine hazards and occupancies. Upon request, the Johnston County Fire Marshal or his designee shall assist the Fire Department in developing pre-fire incident surveys for buildings within the Johnston County Fire Marshal's fire code enforcement service area.
- h. If pressurized fire hydrants are located within the fire district, the Fire Department shall adhere to the guidelines established by the Johnston County Public Utilities Department for the flowing of hydrants. The Fire Department shall immediately report any malfunctions or damage to hydrants to the entity owning the water system. The Fire Department shall conduct fire hydrant testing and maintenance on not less than an annual basis. Testing shall ensure that every wet and dry fire hydrant in the Fire Protection Service District is flushed and checked for accessibility, functionality, visibility, and operation. Records of fire hydrant tests and maintenance conducted by the Fire Department shall be completed and maintained in compliance with the North Carolina Rating System.
- i. The Fire Department shall follow the Johnston County Emergency Operations Plan when responding to an emergency or disaster.
- j. During a declared State of Emergency affecting the County, the Fire Department shall assist, within the limits of its personnel and equipment and capabilities and with deference to its primary service area, to the extent possible with the following services: 1) Debris removal from roadways; 2) Traffic Control; 3) Alert and notification; 4) Search and rescue; 5) Evacuation; and 6) other life saving and property protection measures as necessary. Request for additional assistance outside the primary service area shall be directed to the Fire Chief or designee. All operations shall be in accordance with the Johnston County Emergency Operations Plan.
- k. The Fire Department should have a public fire/life safety education program or similar activities for, at a minimum, educating persons regarding life safety from fire.
- l. When determining the need and location of additional facilities (fire stations, etc.), the Fire Department shall participate in a planning process involving the County Fire Marshal which evaluates, at a minimum, the needs of the department, the effects on property owners, the effects on insurance grading, and the impacts on adjoining fire districts. The Fire Department shall follow the procedure outlined in the Johnston County Fire Service Station Location Request Policy if the station location lies within the Johnston County boundaries. The policy is attached as Exhibit 2 of this contract.



- m. Each Fire Department may elect to voluntarily participate in certain services. Each department that provides these services shall be contracted or franchised for the operation of such service, pursuant to the rules set forth by the Johnston County Board of Commissioners. If the Fire Department has chosen to participate in any of these programs, the agreements can be found as Appendices of this contract:

<b>SERVICE</b>	<b>APPENDIX #</b>
Aid Agreement for Fire Protection	A
Medical Services	B
Rescue Services	C
Cardiac Arrest Assistance Agreement	

- 16) This agreement shall become effective the first day of July 2024, and remain in effect until June 30, 2025, subject to the continued legal existence of the District and the Fire Department, and further subject to the termination provisions of paragraph 8 and 18 hereof.
- 17) This agreement may not be transferred or assigned by the Town, nor may the services contracted for herein be sub-contracted to other parties unless approved by the Johnston County Board of Commissioners.
- 18) This contract may be terminated by either party upon advance notification to the other party by certified mail at least sixty (60) days prior to termination.
- 19) Either party may propose an amendment to this agreement by submitting the amendment in writing at least sixty (60) days in advance of the amendment's proposed effective date. Amendments to this agreement must be approved by both the County and the Town prior to becoming effective.
- 20) If any part of this Contract is for any reason held invalid or unconstitutional by any court of competent jurisdiction, that part shall be deemed a separate, distinct and independent provision, and the holding shall not affect the validity of the remaining portions of this Contract.
- 21) This contract is not intended to serve for the benefit of any third party. The rights and obligations contained herein belong exclusively to the entities that are parties hereto and no third party shall rely upon anything contained herein as a benefit to that third party.
- 22) The terms and provisions herein contained constitute the entire agreement by and between the County and the Town and shall supersede all previous communications, representations, or agreements, either oral or written between the parties hereto with respect to the subject matter hereof.
- 23) **RELATIONSHIP OF THE PARTIES.** The relationship of the parties established by this Agreement is solely that of independent contractors, and nothing contained in this contract shall be construed to (i) give any party the power to direct or control the day-to-day activities of the other; (ii) constitute such parties as partners, joint ventures, co-owners or otherwise as participants in a joint or common undertaking; (iii) make either party an agent of the other for any purpose whatsoever; or (iv) give either party the authority to act for, bind, or otherwise





create or assume any obligation on behalf of the other. Nothing herein shall be deemed to eliminate any fiduciary duty on the party of the Fire Department to the County that may arise under the law or under the terms of this Agreement.

- 24) **IRAN DIVESTMENT AND DIVESTMENT FROM COMPANIES BOYCOTTING ISRAEL.** By signing this agreement Contractor certifies that as of the date of execution they are not listed on the Final Divestment List created by the NC Office of State Treasurer pursuant to NCGS 147 Article 6E, Iran Divestment Act, Iran Divestment Act Certification. Contractor shall not utilize any subcontractor that is identified on the Final Divestment List. Any organization defined under NCGS 147-86.80(2), Divestment from Companies Boycotting Israel, shall not engage in business totaling more than \$1,000 with any company or business that boycotts Israel. A list of companies that boycott Israel is maintained by the NC Office of State Treasurer, pursuant to NCGS 147-86.81(a)(1). Any company listed as boycotting Israel is not eligible to do business with any State agency or political subdivision of the State.
- 25) **E-VERIFY.** Contractor shall comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes. Further, if Contractor utilizes a subcontractor, Contractor shall require the subcontractor to comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes.
- 26) **NOTICES:** All notices or other communications which shall be made pursuant hereto shall be in writing and shall be deemed to be given and received (a) when hand delivered to the address stated below, (b) three (3) days after being mailed to the address stated below, postage prepaid by certified or registered mail of the United States, return receipt requested to the address set forth below:

**TO FIRE DEPARTMENT:** Town of Zebulon - Fire Department  
113 E Vance St  
Zebulon, NC 27597  
Attn: Fire Chief

**TO COUNTY:** Johnston County Emergency Services  
Post Office Box 530 (mail)  
2875 US-70 BUS (physical)  
Smithfield, North Carolina 27577  
Attn: Johnston County Fire Marshal

With copy to: County of Johnston  
Post Office Box 1049 (mail)  
Courthouse 206-B  
207 E. Johnston Street (physical)  
Smithfield, North Carolina 27577  
Attn: County Attorney

- 27) Either party to this Contract may change its designated person or designated address at any time and from time to time by giving notice of such change to the other party in the manner set forth above.

**JOHNSTON COUNTY  
EMERGENCY SERVICES**

120 S. Third Street | PO Box 530 | Smithfield, NC 27577



**Kevin Hubbard**  
Emergency Services Director

Main Office Phone: (919) 989-5050 | Fax: (919) 989-5052

IN TESTIMONY WHEREOF, the County has caused this instrument to be executed by the Chairman of the Board of County Commissioners and attested by the Clerk to the Board of County Commissioners, and Town of Zebulon has caused this instrument to be signed in its name by its Mayor, attested by its Clerk, all by the authorization of their respective Boards duly given.

Johnston County Board of County Commissioners

By: \_\_\_\_\_  
Chairman: R.S. (Butch) Lawter, Jr.

Attest:

\_\_\_\_\_  
Clerk

Town of Zebulon  
By: \_\_\_\_\_  
Mayor

Attest:

\_\_\_\_\_  
Clerk

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

By: \_\_\_\_\_  
J. Chad McLamb, Finance Officer

STAFF REPORT  
ORDINANCE 2025-06  
FIRE ENGINE REPLACEMENT APPROPRIATION  
AUGUST 5, 2024

**Topic:** Ordinance 2025-06 - Fire Engine Replacement Appropriation  
**Speaker:** Chris Perry, Fire Chief  
**From:** Chris Perry, Fire Chief  
**Prepared by:** Chris Perry, Fire Chief  
**Approved by:** Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

Consideration of approval of a budget amendment to appropriate capital funding for a replacement fire engine.

**Background:**

Fire engines are currently replaced based upon a twenty-year life cycle. Due to the substantial increase in incidents in recent years, staff has discussed with the Board the need to move to a more frequent replacement of fire engines. Additionally, fire engine production time (after order) can exceed 36 months in today's market. There may be an option to purchase a fire engine already in the production process, which would reduce the time needed for completion.

The fire department's oldest fire engine was built in 2007 and is nearing its replacement date. It is necessary to order very soon to meet the current twenty-year replacement. Delaying the order would increase the purchase price by 1-2% per quarter. The anticipated cost of the replacement fire engine is \$1,000,000.

**Discussion:**

Adopting the budget amendment will appropriate funding from the fire apparatus capital reserve and fleet reserve to order the apparatus. Unless prepayment options are utilized, no payments would be required until the fire engine arrives.

**Fiscal Analysis:**

Fire apparatus is funded through the fire apparatus capital fund, which includes funding from Wake County for this purpose. This budget amendment appropriates funding from that fund and the fleet reserve to be able to order the replacement vehicle. The unaudited balance of the fire fleet reserve is \$546,101. This along with the County payoff payment that will be received in October and transferring the portion that was originally budgeted to go in the fleet reserve this year will cover the needed appropriation amount.

**Policy Analysis:**

This budget amendment allocates funding for the purpose of ordering a replacement fire engine. The Town's purchasing policy and N.C.G.S. §143-129 will require the actual replacement vehicle purchase to be approved by the Board of Commissioners prior to purchase.

**Staff Recommendation:**

Staff recommends approval of attached contract.

**Attachments:**

1. Ordinance 2025-06

ORDINANCE 2025-06

BE IT ORDAINED by the Board of Commissioners of the Town of Zebulon, that pursuant to North Carolina General Statutes 159-15, the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2025.

Section 1. To amend the General Fund budget as follows:

	INCREASE	DECREASE
REVENUES		
Fund Balance Appropriated	\$516,486.00	
EXPENDITURES		
Fire – Pumper Truck	1,000,000.00	
Fire – Capital Reserve (Fleet)		483,514.00

Section 2. Copies of this amendment shall be furnished to the Town Clerk, and to the Budget Officer, and to the Finance Officer for their direction.

Adopted: August 5, 2024

Effective: August 5, 2024

\_\_\_\_\_  
Glenn L. York - Mayor

ATTEST:

\_\_\_\_\_  
Lisa M. Markland, CMC - Town Clerk

**Topic:** Fire/EMS Station Design Professional Services Agreement  
**Speaker:** Chris Perry, Fire Chief  
**From:** Chris Perry, Fire Chief  
**Prepared by:** Chris Perry, Fire Chief  
**Approved by:** Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

Consideration of approval of a professional services agreement for design of the Fire/EMS station project.

**Background:**

The Town of Zebulon has been working jointly with Wake County on a project to construct a Fire/EMS station behind the municipal complex. In April, 2024, the Board approved an amendment to the Memorandum of Understanding, which included several next steps in the design process. That MOU included a budget for services, which included the design services to develop construction drawings. This professional services agreement is consistent with the MOU approved in April, 2024 and requires Board approval due to the contract amount.

ADW Architects, PA was selected by Wake County as their public safety designer through a qualifications-based selection process in 2023.

This agreement has been reviewed by our Town attorney, the Wake County attorney, and the United States Department of Agriculture (USDA).

**Discussion:**

Approval of this agreement is consistent with the MOU with Wake County and allows design services to be continued for the Fire/EMS project.

**Fiscal Analysis:**

In April 2024, the Board allocated funding for design completion and preliminary site investigation related to the Fire/EMS station project. This agreement is within the budgeted funds for design as outlined in the MOU with Wake County.

**Policy Analysis:**

The Town's purchasing policy requires Board of Commissioner approval of professional services agreements in excess of \$300,000.

**Staff Recommendation:**

Staff recommends approval of the professional services agreement for design of the Fire/EMS station with ADW Architects PA.

**Attachments:**

1. Contract



AGREEMENT FOR DESIGN PROFESSIONAL SERVICES
ZEBULON FIRE AND EMS STATION

This Agreement for Design Professional Services (referred to herein as the "Agreement") is entered into by and between:

The Town of Zebulon (hereinafter, the "Owner") and
ADW architects PA (hereinafter, the "Architect").

The Owner And The Architect Are Sometimes Referred To In This Agreement Collectively As The "Parties".

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**AGREEMENT**

**1. Effective Date**

1.1. This Agreement shall be effective this 5th day of August 2024.

**2. Project**

2.1. The Project is the Zebulon Fire and EMS Station. The shared Fire and EMS facility will be single-story and consists of an approximate 24,679 SF building with (4) full apparatus bays for the Town apparatus and (1) full apparatus bay for Wake EMS along with related sitework providing approximately (44) parking spaces. The Town of Zebulon Fire Department will utilize 16,830 dedicated square feet. Wake EMS will utilize 3,270 dedicated square feet. The Fire and EMS will share 4,762 square feet.

2.2. The Project will be located on Town-owned 10.97 Acre property adjacent to the Town Hall and Police Station that fronts West Judd Street.

2.3. This Agreement succeeds an earlier Consultant Services Agreement between Wake County and adw architects PA dated November 3, 2014 for Advanced Planning, Programming, Schematic Design and any and all Amendments to those agreements.

**3. Project Delivery Assumptions**

3.1. The design of the Project shall be subject to Article 1 of Chapter 133 of the North Carolina General Statutes, and this Agreement. The Architect shall be responsible for all of the services described in Section 12 of this Agreement, including without limitation the preparation of all Construction Documents and other documents and materials described and defined in Section 12, plus any additional services for which the Architect is engaged in accordance with Section 13 of this Agreement. The Owner's intent is to award contracts to construct the Project pursuant to the construction management at risk method as set forth in Article 8 of Chapter 143 of the North Carolina General Statutes.

3.2. The Owner reserves the right at any time to change the method by which contracts to construct the Project are awarded.



**4. Parties**

4.1. Owner:

The Owner of the Project is the Town of Zebulon, a political subdivision of the County of Wake in North Carolina. The Owner is governed by the Town Council of the Town of Zebulon, referred to in the Agreement as the "Town Council". The chief executive of the Owner is its Town Manager, and for purposes of this Agreement "Town Manager" shall mean the employee of Town of Zebulon bearing that title at any given time during the performance of this Agreement. The Owner's primary representative and point of contact during the Project shall be the Director and Senior Project Manager of Wake County's, Facilities Design & Construction Department, referred to herein as "FD&C". The County FD&C department will develop this project for the end users, Town of Zebulon Fire Department and Wake EMS, whose interest FD&C represents, and who will also provide representatives to support the Owner in the development of this project.

4.2. Architect:

The Architect is ADW Architects PA, a corporation, organized and in good standing under the laws of the State of North Carolina. The Managing Principal of the Architect is Jim Powell and for purposes of this Agreement "Project Executive" shall mean the principal of the Architect bearing that title at any given time during the performance of this Agreement. The Architect's primary representatives during the Project shall be the person or persons designated as such in Attachment A, Responsible Personnel Organizational Chart, which is incorporated into this Agreement.

**5. Architect's Responsible Personnel**

5.1. Of Essence:

The services to be provided by the Architect under this Agreement shall be performed by the Architect's Responsible Personnel. The furnishing of services by such Responsible Personnel, and any individuals approved by the Owner to replace them, is of the essence to this Agreement.

5.2. Additions, Removals, Replacements:

From time to time, Responsible Personnel may be added as necessary and appropriate to the stage of planning, programming, designing and constructing the Project. The Architect shall anticipate the need for such additional Responsible Personnel by submitting to the Owner, no later than seven (7) days prior to the need for the additional personnel, a proposed amendment to Attachment A setting forth the Architect's proposed additions, attaching the resumes of proposed additional staff, and stating the reasons for such additions. The Owner shall promptly review the proposed amendment and either approve or disapprove the additional Responsible Personnel in writing. The Architect shall not employ any individual to perform the functions of any Responsible Personnel without the advance approval of the Owner, which approval may be granted or withheld in its sole discretion. The Architect shall not, for so long as any Responsible Person is employed by the Architect, remove, substitute or reduce the time devoted to the Project by such person without the Owner's prior written approval, which may be granted or withheld in its sole discretion. If the Owner is for any reason dissatisfied with the services rendered by any Responsible Person, the Architect shall promptly remove such Responsible Person and recommend a replacement. If any Responsible Person ceases employment with the Architect, or if the Owner requests the removal of any Responsible Person, then the Architect shall promptly notify the Owner of a proposed substitute of at least equal qualifications to perform the same functions, and provide a resume for the substitute. Each substitute Responsible Person must be approved by the Owner prior to commencing performance of any services for the Project, which approval may be granted or withheld in the Owner's sole discretion. The Architect shall bear, at its own expense and without reimbursement by The Owner, all costs associated with replacing, for any reason, any Responsible Person. The Architect shall remain solely responsible to the Owner, notwithstanding the Owner's approval of any Responsible Person, for the quality and performance of all services provided by Responsible Personnel.

5.3. Architect's Project Representative:

The Architect shall designate a Project Representative, who may or may not be its full-time on-site Field Representative, who has the authority to act on behalf of the Architect in respect to all matters that are the subject of this Agreement, including, without limitation, the power and authority to enter into agreements or modifications that contractually bind the Architect. The Project Representative shall be qualified and authorized to make interpretations of the Construction Documents and shall be available at all times during all

phases of performance of services under this Agreement to consult with the Owner on matters pertinent to design and construction of the Project.

5.4. Architect's Employees:

None of the persons employed by the Architect and its Design Consultants shall be considered employees of the Owner. The Architect and its Design Consultants shall be solely responsible for any workers' compensation obligations, withholding taxes, unemployment insurance, compliance with immigration and licensing laws, and any other employer obligations with respect to all of their respective employees.

**6. Other Project Participants**

6.1. General:

The Owner acknowledges and agrees that the Architect will delegate to consultants and subcontractors responsibility for certain services required by this Agreement. The Architect acknowledges and agrees that the Owner will contract with a construction manager or other contractors to construct the Project. The Architect also acknowledges and agrees that the Owner will delegate to separate consultants and contractors some of the Owner's responsibilities under this Agreement. Each of the Parties agrees to work with all project participants in good faith and in a spirit of teamwork, putting the interests of the Project first. Each of the Parties agrees to identify all project participants to the other Party, and to notify the other Party of any changes in project participants during the course of the Project.

6.2. Design Consultants:

The Architect may delegate specific design responsibilities to consultants and subcontractors, referred to herein as "Design Consultants", provided prior written notice is first given to the Owner. The Architect shall not employ any Design Consultant without the advance approval of the Owner, which approval may be granted or withheld in its sole discretion. The anticipated Design Consultants for the Project, and their key project personnel, are listed in Attachment A to this Agreement. The Architect's notice that it is engaging or substituting a Design Consultant shall be submitted to the Owner in writing and shall describe the Design Consultant's scope of services, shall include the resumes of key staff (if requested) to be assigned to the Project, and shall summarize the total price and/or hourly rates for the Design Consultant's services. The Owner shall promptly either approve or disapprove each Design Consultant in writing. The Architect shall not remove, substitute or reduce the services of an approved Design Consultant without the Owner's prior written approval, which may be

granted or withheld in its sole discretion. If the Owner is for any reason dissatisfied with the services rendered by any Design Consultant, the Architect shall promptly remove such Design Consultant and promptly recommend a replacement of at least equal qualifications to perform the same functions. Each substitute Design Consultant must be approved by the Owner prior to commencing performance of any services for the Project. The Architect shall bear, at its own expense and without reimbursement by The Owner, all costs associated with replacing, for any reason, any Design Consultant. The Architect shall remain solely responsible to the Owner, notwithstanding the Owner's approval of any Design Consultant, for the quality and performance of all services provided by Design Consultants. Communications by and with the Architect's Design Consultants shall be through the Architect. All of the Architect's contracts with its Design Consultants shall be in writing and shall expressly provide that if this Agreement is terminated for any reason, the Owner may, at its sole option, take the assignment of the Design Consultants' contracts with the Architect, that such assignment shall automatically take place upon notification in writing by the Owner to the Design Consultants and that the Design Consultants shall continue to be bound by the contract after such assignment. Every subcontract or agreement of any kind entered into between the Architect and a Design Consultant (or between any Design Consultant and other independent contractor Design Consultants) shall contain appropriate language whereby the Design Consultant, without creating any contractual obligation on the part of the Owner to the Design Consultant or to anyone working under contract to the Design Consultant, accepts and agrees to be bound by all of the obligations of this Agreement, including, without limitation, those obligations pertaining to indemnification, insurance, accounting records, audit and ownership of documents. A copy of each contract between the Architect and a Design Consultant shall be furnished to the Owner within seven (7) days of its execution.

6.3. Owner's Construction Manager and Consultants

6.3.1. The Construction Manager for the Project (referred to herein as the "CM") shall be selected in accordance with Article 3D and Article 8 of Chapter 143 the North Carolina General Statutes. The Architect will be provided with a copy of any and all requests for qualifications and requests for proposals published to solicit candidates to serve as CM. The Architect will also be provided with all responses to such requests for qualifications and requests for proposals, and be given an opportunity to comment on the candidates for CM. A copy of the contract between the Owner and the CM, and all addenda thereto, will also be provided to the Architect. It is the intent of the Owner to select a CM after the Schematic Design phase of the project.

6.3.1. In addition to the CM, the Owner reserves the right to contract with additional consultants and contractors to meet the Owner's obligations for the Project. Such other consultants and contractors may include, without limitation and subject to change, the following:

- 6.3.1.1. Programming Design Consultant
- 6.3.1.2. Surveyors
- 6.3.1.3. Geotechnical Engineers
- 6.3.1.4. Environmental Engineers or Geologists
- 6.3.1.5. Testing and Materials Inspectors
- 6.3.1.6. Special Inspections Inspectors
- 6.3.1.7. Commissioning Agents
- 6.3.1.8. Project Management Consultant(s)

6.3.2. The Owner agrees to provide the Architect with copies of all contracts for such additional consultants and contractors and identify the responsible personnel for each such consultant and contractor if requested by the Architect. These additional consultants and contractors are referred to in this Agreement as the Owner's "separate consultants".

## **7. Third-Party Liability**

Notwithstanding anything in Article 4 or any other provision of this Agreement, by entering into the Agreement the Owner assumes no obligation to pay fees for services rendered by any Design Consultant, and the Architect assumes no obligation to pay fees for services rendered by the CM or any other consultant or contractor engaged by the Owner.

## **8. Definitions**

### **8.1. Construction Documents:**

The term "Construction Documents" shall mean the drawings and specifications prepared by the Architect and issued for construction of the Project as more fully defined and described in Section 12 of the Agreement.

### **8.2. Day:**

The term "day" shall be deemed to mean a calendar day, unless otherwise specifically indicated.

8.3. Fixed Limit of Project Cost:

At all times during the Project, the Owner shall approve an estimate of the total cost of the Project (the "Fixed Limit of Project Cost"), which shall include the Architect's fees, costs of site preparation, costs of the construction, costs of equipment, furnishings, furniture and signage, permit fees and appropriate contingencies.

8.4. Milestone Dates:

The term Milestone Dates and Milestone Listing shall mean the dates listed in Attachment B to the Agreement, as more fully defined and described in Article 14 of the Agreement.

8.5. Preliminary Schedule:

Preliminary Schedule shall refer to a critical path method schedule to be prepared by the Architect to facilitate and expedite the management of design and pre-construction services until the CM prepares the Project Schedule defined herein.

8.6. Project Schedule:

Project Schedule shall refer to the critical path method schedule to be prepared by the CM to facilitate and expedite the management and administration of the entire Project, including all design, construction and inspection activities. Upon approval by the Owner and the Architect of the Project Schedule, the Project Schedule shall be added to this Agreement by an Amendment signed by the Owner and the Architect and the Project Schedule so incorporated into this Agreement shall govern the schedule of activities of the Architect under this Agreement. No such Amendment shall be effective except upon such Amendment being signed by the Architect and the Owner.

8.7. Substantial Completion:

The date of substantial completion of the Work or designated portion thereof is the date when the Work or a designated portion thereof is sufficiently complete, in accordance with the Construction Documents, so the Owner can fully occupy and utilize the Work or designated portion thereof for the use for which it is intended, with all of the Project's parts and systems operable as required by the Contract Documents. Only incidental corrective Work and any final cleaning beyond that needed for the Owner's full use may remain for final completion.

**8.8. Written Notice:**

Any and all notices, instructions, requests, demands or other communications required or permitted to be given or made hereunder to the Architect shall be sufficiently given if in writing and sent by first class mail, postage prepaid, or by commercial courier, to the Architect at the place of business of the Architect set forth on the last page of this Agreement or to such other address as shall be designated in writing by the Architect by notice given to the Owner in accordance with this Paragraph. Any and all notices, instructions, requests, demands or other communications required or permitted to be given or made hereunder to the Owner shall be sufficiently given if in writing and sent by first class mail, postage prepaid, or by commercial courier, to the Owner at the place of business of the Owner set forth on the last page of this Agreement or to such other address as shall be designated in writing by the Owner by notice given to the Architect in accordance with this Paragraph. Other forms of written and electronic communication, such as email, instant message, fax, meeting minutes, and logs are not inherently reliable, and notices, instructions, requests, demands or other communications given by such methods will not be considered sufficiently given unless the parties later agree by written modification to this Agreement that such forms of communication will be sufficient.

**8.9. Work:**

As used in the Agreement, the term "Work" refers to the construction provided by the CM and its trade contractors and by other separate construction contractors engaged by the Owner, including all labor, materials, supplies, equipment, building components, means and methods to fulfill their respective construction obligations.

**9. Qualifications**

**9.1. General Capability:**

By its execution of this Agreement, the Architect represents, warrants and agrees that it is qualified to and fully capable of performing and providing the professional architectural and engineering and other services required or necessary under this Agreement in a fully competent, fully professional and timely manner, and that its Design Consultants are also fully capable of and fully qualified to perform and provide the services that they will provide hereunder.

9.2. Licenses:

All services required of the Architect by this Agreement must be performed under the responsible charge of design professionals duly licensed and in good standing under the laws of the State of North Carolina. The Architect agrees at any time upon seven days notice to provide the Owner with proof of licensure and good standing of any individual whose seal appears on any document produced by the Architect or its Design Consultants for the Project.

9.3. Registration in North Carolina:

The Architect represents and warrants that it and all of its Design Consultants are properly registered and qualified to do business and practice their respective professions in North Carolina. Upon reasonable request by the Owner, the Architect will within seven days provide the Owner with proof that the Architect or any Design Consultant is properly registered and qualified to do business in North Carolina. The Architect agrees to keep its registration [s] current throughout the duration of the Project.

**10. Standard of Care**

- 10.1. The Architect and its Design Consultants shall exercise reasonable care and diligence in performing their services under this Agreement, including both design and administration services, consistent with the professional skill and care ordinarily exercised by practicing design professionals performing similar services in the same locality and under similar circumstances for projects of similar size and complexity (the Standard of Care) and shall exercise the Standard of Care such that it is in accordance with federal, state and local laws and regulations applicable to the performance of these services. The Architect shall serve as a representative of the Owner in accordance with the terms and conditions of this Agreement to guard the Owner against defects and deficiencies in the Work.
- 10.2. The Architect shall be directly responsible for all errors or omissions in the drawings, specifications, and other documents prepared by the Architect or its Design Consultants. It shall be the responsibility of the Architect throughout the period of performance under this Agreement to use reasonable professional care and judgment to guard the Owner against defects and deficiencies in the Work.
- 10.3. The Architect acknowledges and agrees that the Owner does not undertake to approve or pass upon matters of design. The Architect acknowledges and agrees that the approval or acceptance of the plans and specifications by the Owner and the Owner's decision to proceed with construction work is limited to the function of determining whether there has been



compliance with the Owner's program and instructions issued to the Architect regarding general layout of space. The Architect agrees that no approval of plans and specifications by any person, body or agency shall relieve it of the responsibility for the adequacy, fitness, suitability and correctness of architectural and engineering design and for designing the Project in accordance with sound and accepted engineering and architectural principles.

- 10.4. The Architect shall correct at no additional cost to the Owner any and all errors, omissions, discrepancies, ambiguities, mistakes or conflicts in the drawings, specifications and other documents prepared by the Architect or its Design Consultants.
- 10.5. The Architect shall exercise the Standard of Care to assure that all drawings, specifications and other documents prepared by it and its Design Consultants hereunder are in accordance with applicable laws, statutes, building codes and regulations and that all necessary or appropriate applications for plan reviews, technical reviews or other approvals of any drawings, specifications or other materials prepared by the Architect are submitted to federal, state and local governments or agencies in a timely manner so as not to delay the design or construction activities of the Project.
- 10.6. The Architect shall use its skills and expertise to review the work product and information furnished to the Architect by other Project Participants, and to report to the Owner, with appropriate recommendations, any errors, conflicts or omissions that it discovers, or that the Architect should have discovered in the exercise of the standard of care required by this Agreement, that may adversely affect the design or construction of the Project; provided, however, that failure by the Architect to give such notice shall not relieve the other Project Participants of their liability or responsibility.
- 10.7. The Architect and its Design Consultants shall perform all services in a timely manner in accordance with all schedules for the Project required under the Agreement and as provided in the General Conditions of the Owner's contracts with the CM for the Project.
- 10.8. Decisions: Interpretations and decisions of the Architect shall be consistent with the intent of and reasonably inferable from the Construction Documents and shall be in writing or in the form of drawings. When making such interpretations and initial decisions, the Architect shall endeavor to secure faithful performance by both the Owner and the CM and its contractors, shall not show partiality to either, and shall not be liable for results of interpretations or decisions so rendered in good faith. The Architect's decisions on matters relating to aesthetic effect shall be final if consistent with the intent expressed in the Construction Documents. The Architect shall render written decisions within a reasonable time on all claims, disputes or other matters in question between the Owner and the CM and its contractors relating to the

execution or progress of the Project. The Architect's decisions on claims, disputes or other matters, including those in question between the Owner and the CM, except for those relating to aesthetic effect, shall be subject to dispute resolution as provided in this Agreement and the CM contract.

- 10.9. Conflicts of Interest and Non-Collusion: Except with the Owner's knowledge and consent, the Architect shall not engage in any activity, or accept any employment, interest or contribution that would reasonably appear to compromise the Architect's professional judgment with respect to this Project.

## **11. Description of Services**

- 11.1. The Architect shall provide the Owner with all architectural and engineering services required to satisfactorily complete all phases of the Project within the time limitations set forth herein and in accordance with the professional standards described in Article 10 of this Agreement. All services of the Architect shall be provided in accordance with the terms and conditions of this Agreement.
- 11.2. The services to be performed under this Agreement consist of Basic Services, as described and designated in Section 12 of this Agreement, and such Additional Services as are designated in Section 13 of this Agreement, or as may from time-to-time be agreed upon by the Owner and Architect by Amendment or Addendum to this Agreement. Compensation to the Architect for Basic Services under this Agreement shall be as set forth herein, and compensation for Additional Services shall be as set forth herein or in any Amendment or Addendum providing for them.

## **12. Basic Services**

### **12.1. General Scope:**

All services performed by the Architect not identified as Additional Services in Section 13 of this Agreement or in a written Amendment or Addendum to the Agreement entered into by the Owner and the Architect and providing for additional compensation for such additional services relating to the Project shall be deemed to be Basic Services which are provided without additional compensation. It is understood that the Architect shall be required, without adjustment or addition to the compensation agreed to in this Agreement, to provide any services, whether or not listed in this Section 12, within the scope of its field of professional practice that (i) are reasonably inferable as being necessary to accomplish the Basic Services set forth in this Agreement, or (ii) that would be customarily furnished by

other providers of professional services of the type and nature provided for in this Agreement. Without in any way limiting the general scope of Basic Services, the following is a description of specific Basic Services that the Architect is expected to provide under this Agreement:

12.2. Design:

The Architect shall provide the comprehensive design for the Project. The Project design may be developed in phases, including, Design Development, and Construction Documents.

The Architect will be prepared to meet with the Owner at least weekly to discuss design status until the Construction Documents are complete and issued for construction. The Owner, in its sole discretion may vary the schedule for these status meetings or accept written reports in lieu of meetings.

12.2.1. The Schematic Design Phase has been completed by prior agreement for the Owner's approval.

12.2.2. The Design Team shall incorporate the USDA Grant requirements per attachment G into their process and project requirements such as Build America, Buy America Act.

12.2.3. Design Development: Based on the approved Schematic Design Documents and any adjustments authorized by the Owner, the Architect shall prepare Design Development Documents for the CM's review and the Owner's approval. The Design Development Documents shall illustrate and describe the refinement of the design of the Project, establishing the scope, relationships, forms, size and appearance of the Project. The Design Development Documents shall consist of plans, sections and elevations, typical construction details, equipment layouts and other documents that establish and describe the size and character of the Project as to architectural, structural, mechanical and electrical systems, materials and such other elements as may be appropriate. The Design Development Documents shall include specifications that identify major materials and systems and establish, in general, their quality levels. At intervals mutually agreeable to the Owner, CM and Architect, the Architect shall provide drawings and other documents which depict the current status of design development for review by the Owner and CM. Upon completion of the Design Development Phase, the Architect shall provide drawings, outline specifications and other documents for the Owner's approval and the CM's information.

12.2.4. Construction Documents: Based on the approved Design Development Documents and any further adjustments authorized by the Owner in the scope or quality of the Project or in the Fixed Limit of Project Cost, the Architect, utilizing data and estimates prepared by the CM, shall prepare, for approval by the Owner, Construction Documents consisting of drawings and specifications setting forth in detail the requirements for the construction of the Project. The Construction Documents shall establish in detail the quality levels of materials and systems required for the Project. At intervals mutually agreeable to the

Owner, CM and Architect, the Architect shall provide Drawings and Specifications for review by the Owner and the CM. Upon completion of the Construction Documents Phase, the Architect shall provide Construction Documents for the Owner's approval and the CM's information. The Construction Documents shall be prepared utilizing AutoCAD software or comparable software acceptable to the Owner, and shall be of such quality and workmanship so that clear, legible and uniformly sized duplicate tracings or prints may be obtained. All lettering shall be a minimum of 1/8 inch high in order to be reproduced legibly when providing future record drawings. The specifications included with the final Construction Documents shall be printed with black ink on 8½ x 11 white paper stock suitable for producing clear copies on a reproduction machine, or such other process as may be approved by the Owner. The Architect shall provide to the Owner at least one set of mylars, five sets of prints and copies, and one set on disk in AutoCAD format (or comparable software acceptable to the Owner) of the 100% complete set of Construction Documents, including specifications. The Architect shall be responsible for the content of all Construction Documents. All final Construction Documents prepared or signed by the Architect or its Design Consultants and submitted to governmental authorities and code officials shall be complete, coordinated and contain directions so as to (i) enable a competent contractor to carry them out; (ii) meet the requirements of governmental authorities and code officials; and (iii) be sufficiently complete and sufficiently free of conflicts so as to be capable of definitive pricing by contractors with a minimum of further clarifications or detailing by the Architect or its Design Consultants.

12.2.5. The scope of the design shall include at least the following:

- 12.2.5.1. Site, Civil and Landscaping
- 12.2.5.2. Architectural
- 12.2.5.3. Structural
- 12.2.5.4. Plumbing
- 12.2.5.5. Mechanical
- 12.2.5.6. Fire Sprinkler and Alarm Systems
- 12.2.5.7. Electrical
- 12.2.5.8. Specialties
  - 12.2.5.8.1. Communications Systems
  - 12.2.5.8.2. Audio/Video Systems
  - 12.2.5.8.3. Space Planning
  - 12.2.5.8.4. Furniture and Equipment
  - 12.2.5.8.5. Signage and Wayfinding

12.2.6. Design by CM and its Contractors: When the Construction Documents provide that a contractor, supplier, or an engineer retained by a contractor or supplier shall design building components or certify performance characteristics of materials, systems or equipment, the Architect shall provide specific and

detailed performance and design criteria for the designer to follow and achieve. Notwithstanding the delegation of design responsibility to contractors and suppliers, the Architect shall be ultimately responsible for the conformity of the design of all materials, systems or equipment to the Construction Documents.

12.2.7. Independent Reviews: The Project is subject to independent design reviews conducted by the Owner or consultants retained by the Owner at the Owner's expense. The Architect shall cooperate with these design reviews. The Architect shall, as part of Basic Services, prepare written responses to the written review comments and shall make changes to the design documents responsive only to those comments that the Architect reasonably deems to require such changes. If the Architect does not deem a comment to require a change, the Architect shall so state in the written response to the comment, providing reasons why no change should be implemented. Should the Owner decide to make changes to the design or the Project based on independent reviews of the design, such changes will be subject to the other relevant Sections of this Agreement.

12.3. Construction Permitting and Procurement:

12.3.1. Construction Manager Agreement: The Architect promptly shall review a copy of the CM contract when provided by the Owner to the Architect and shall become familiar with the respective services, authorities, obligations and responsibilities of the parties therein. The Architect agrees to coordinate, assist and develop a working relationship with the CM to effectuate the purposes of the Project.

12.3.2. Bid Package Preparation: The Architect agrees to cooperate with the CM and the Owner with respect to the timely division of the drawings and specifications into bid packages for the solicitation of construction contracts. In the event the construction Work for the Project is bid in phases, the Architect agrees to cooperate with the CM and the Owner to prepare bid packages as construction documents become available for release and within the time frames necessary to maintain the Project Schedule. Completion of any early packages, such as site work, footings & foundations, steel, etc. would be considered Additional Services for an additional fee, as per page 3 of the Architect's fee proposal included in Attachment E. The CM shall arrange for the reproduction of bidding documents for distribution to prospective bidders. The CM shall distribute the bidding documents to prospective bidders and request their return upon completion of the bidding process. The CM shall maintain a log of distribution and retrieval, and the amounts of deposits, if any, received from and returned to prospective bidders. The Architect shall be entitled to a copy of the bidding documents distribution log.

12.3.3. Pre-bid conferences: The Architect agrees to preside over and answer questions at pre-bid conferences for each bid package as it is released for bids. The Architect is expected to make a record of

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the attendees and proceedings at all pre-bid conferences and distribute the record promptly to the Owner, the CM and other appropriate parties.

12.3.4. Clarifications and Addenda: The Architect's Basic Services includes the preparation of addenda and the issuance of design clarifications to potential bidders prior to bid opening.

12.3.5. Bid Opening: It is expected that the bidding process will be the responsibility of the CM. Nevertheless, the Architect will cooperate with the CM in the bidding process, and will be provided copies of all bid solicitations and bids. The Architect shall immediately report to the Owner any perceived bidding irregularities or concerns about the bidding process. The Architect shall be given an opportunity to review all bid tabulations, evaluate all bids, and question the selection of any contractor. If requested by the Owner, the Architect shall provide written recommendation to award or not award a contract to any particular bidder.

12.3.6. Re-bidding and Post-bid Negotiations: The Architect's obligation to assist with and cooperate in the bidding process will include re-bidding any bid packages as necessary to comply with the North Carolina competitive bidding laws, and shall extend to post-bid negotiations with bidders as allowed by law.

12.3.7. Approvals, Permits and Code Compliance: Although the responsibility to secure and pay for approvals and permits for the Project rests on the Owner, the Architect shall prepare all applications and supporting documents needed to obtain regulatory approval and construction permits from government agencies and building code enforcement officials with jurisdiction over the Project. The Architect will provide as part of Basic Services all prints, calculations, specifications and reports that are required by government agencies and code enforcement officials, utilizing information provided by the Owner in accordance with this Agreement, plus additional materials developed by the Architect as required. The Architect shall meet and confer with the North Carolina Department of Insurance, the North Carolina Department of Labor, the state fire marshal, local fire authorities, local building officials, local planning officials, city or state street and engineering departments, other pertinent governmental authorities and utility companies to determine their requirements, shall secure their preliminary approval, and shall notify the Owner and the CM of actions they must take in order to secure final approvals and agreements for the Project.

12.4. Budget and Cost Control:

12.4.1. Fixed Limit of Project Cost: This Project currently has a Fixed Limit of Project Cost of \$14,500,000, a breakdown of which is included as Attachment E hereto. The CM will also provide the Owner with detailed estimates of project costs at each design phase.

12.4.2. Coordination with CM: During Design Development and Construction Documents, primary responsibility for estimating construction costs, implementing a system of cost control and providing budgetary input to the Architect and the Owner will shift to the CM. The Architect will review and analyze the CM's cost estimates, including an analysis of unit prices, and provide feedback to the CM and Owner. These reviews will be based on the Architect's experience working on similar projects in North Carolina.

12.4.3. Constructability Reviews and Value Engineering: The CM will be required to review the design for ease and efficiency of construction, and to suggest possible cost savings through product selection and through engineering and fabricating processes available to contractors and suppliers. The Architect agrees to give due consideration to all suggestions for cost savings from the CM. No change in the design to save Project costs will be incorporated into the design for the Project, however, except by documents issued and signed by the Architect and approved by the Owner. Changes in the design to save costs shall be made by the Architect without additional compensation.

12.4.4. Redesign or Revisions to Meet Fixed Limit of Project Cost: If upon receipt of bids to construct the Project it is apparent that the Project cannot be completed within the Fixed Limit of Project Cost, the Architect agrees, without additional compensation, in cooperation with the Owner and the CM, to redesign the Project as necessary, re-bid selected bid packages, or re-negotiate construction contracts to bring the Project within the Fixed Limit of Project Cost.

12.5. Construction Administration/Meetings:

The Architect agrees to provide the following Basic Services during the construction phases of the Project:

12.5.1. Preconstruction Meetings: The Architect will attend all preconstruction meetings. The CM will schedule and preside over preconstruction meetings and make a record of the attendees and proceedings at all such meetings.

12.5.2. Project Schedule Input: The CM shall be responsible for creating and maintaining a Project Schedule. The Architect's schedule for the performance of its activities and the activities of its Design Consultants during the Construction Phase shall be reduced to writing and submitted to the Owner for review and approval and to the CM for inclusion in the Project Schedule. This schedule shall include planned dates and durations for the receipt, review and return of Submittals and product data from the contractors. The Architect shall prepare and submit to the Owner and the CM a list of events that will affect or determine the completion of individual construction activities, such as pre-installation meetings for key building systems, special and regular inspections, commissioning of building systems, and operation and maintenance training. The Architect shall also prepare and submit for inclusion in the

Project Schedule all known approvals or decisions to be furnished or made by the Owner, including the dates by which the Owner shall have all information necessary from the Architect with respect to that approval or decision and the date by which the approval or decision should be communicated to the Architect. The Owner shall always have a reasonable time within which to provide such approval or decision and shall not have any responsibility for any delay occurring by reason of the Owner's being unable, through no fault of the Owner, to supply such item of information, approval or decision.

12.5.3. Substitutions and Variations: The Architect will respond to all requests from the Owner, the CM or any contractor to substitute or vary any material, component or other feature of the drawings and specifications.

12.5.4. Submittals and Product Data: The Architect shall review and approve or take other appropriate action on all fabrication drawings, erection drawings, details, product samples, product data and other submittals required of the trade contractors and suppliers (referred to generally in this Agreement as "Submittals"). The Architect shall review and return such Submittals in a timely fashion so as to cause no delay in the construction of the Project, while allowing sufficient time in the Architect's professional judgment to permit adequate review. The Architect shall not be held responsible for delays caused by contractors and suppliers. The Architect shall determine whether Submittals conform to the design concept expressed in the Construction Documents. Review of such Submittals is not conducted for the purpose of substantiating instructions for installation, or for guaranteeing the quality or performance of equipment or systems designed and warranted by the contractors and suppliers, all of which remain the responsibility of the contractors and suppliers to the extent required by the Construction Documents. The Architect shall maintain detailed Submittal Logs showing when Submittals were received by the Architect and returned, and the action taken on each submittal. The Submittal Logs shall be provided to the Owner and the CM at all times during the Project upon request. The Architect's review shall not constitute approval of safety precautions or, unless otherwise specifically stated by the Architect, of construction means, methods, techniques, sequences or procedures.

12.5.5. Project Access: The Architect and its Design Consultants shall at all times have access to the Project site for purposes of carrying out their duties and services under this Agreement. The Architect and its Design Consultants shall adhere to all rules governing site access implemented by the CM with the Owner's approval. The Architect and its Design Consultants shall adhere to all site safety and security rules implemented by the CM and the Owner.

12.5.6. General Correspondence: The Architect will be provided with all correspondence between the Owner and the CM that materially involve the design of the Project or the services being provided by the Architect. The Owner will be provided with a copy of all correspondence between the Architect and the CM or any of the contractors that materially involve the design of the project, except for normal and customary construction coordination items.



12.5.7. Quality Assurance: It shall be the responsibility of the Architect and its Design Consultants throughout the period of performance under this Agreement to use reasonable professional care and judgment to guard the Owner against defects and deficiencies in the Work. The Architect and Design Consultants as appropriate shall observe the Work at least weekly by the Designer responsible for the discipline of work under construction. The Architect will observe the Work of the contractors in progress, at least often enough to satisfy itself that the Work complies with the Project Construction Documents before the Work is covered up or obscured. All such observations shall be conducted deliberately and thoroughly for the purpose of (i) ascertaining in general that the character, scope, quality and detail of construction (including workmanship and materials) comply with the Construction Documents, the Owner's directives, approved Submittals, the Architect's clarifications, applicable laws and requirements of governmental authorities; (ii) evaluating the progress of the Work; (iii) evaluating the suitability of the Project, or any portion designated by the Owner, for use or occupancy; (iv) investigating and responding to design and constructability issues or questions of concern to the Architect or its Design Consultants, or as noted in any inspection or observation reports furnished to the Architect; (v) observing the overall quality of the contractors' performance; (vi) reviewing construction of crucial components of the Work; and (vii) observing the performance of specified or directed tests significant to the acceptability of components of the Work. Observations shall be separate from any inspections which may be provided by code or other government inspectors, or inspections by the Owner's separate consultants. Such inspections shall not relieve the Architect of its responsibilities under this Agreement. Any Design Consultant who has prepared designs or specifications shall be responsible to observe, in accordance with the provisions of this Agreement, those portions of the Work that it designed or specified. If the Architect believes that construction Work has been covered up or permanently obscured from view before the Architect could observe the Work, the Architect shall immediately notify the Owner that the Work was not observed, describing in detail the Work that was not observed and its location.

12.5.8. Site Observation Reports: At least weekly, the Architect shall submit to the Owner a written report detailing the observations of the Architect and its Design Consultants at the site over the preceding week, detailing those matters with respect to which the Architect is required to conduct such observations as set forth in this Section.

12.5.9. Testing and Special Inspections: The Architect shall recommend, review and coordinate with all materials and construction testing and all special inspections in accordance with the provisions of the Construction Documents and applicable laws. The Architect agrees to enter into whatever agreements local code officials and governmental agencies require concerning notification and coordination of special inspections. The Architect shall review inspection reports, laboratory reports and test data to determine conformity of such data with the design requirements expressed in or implied by the Construction Documents and approved Submittals. All Testing and Special Inspections will be provided by the Owner.

12.5.10. **Rejection of Work:** If the Architect or its Design Consultants observe Work in progress that does not conform to the Project design documents, the Architect shall have the right and the obligation to reject the Work by written notice to the CM and the Owner. If the Owner thereafter decides to accept non-conforming Work, that decision will be noted in the as-built records of the Project.

12.5.11. **Stop Work Orders:** If the Architect or its Design Consultants observe Work or procedures at the Project site that pose an imminent threat of property damage or bodily injury to any person, the Architect shall immediately order the Work stopped by notice to the CM and the Owner. Otherwise, only the Owner shall have the authority to stop the Work.

12.5.12. **Meetings:** The Architect's Field Representative shall attend all construction progress meetings scheduled by the CM. Other representatives of the Architect and the Design Consultants shall attend construction progress meetings at the reasonable request of the Owner. The CM shall preside over and make the minutes of attendance and proceedings at all construction progress meetings, and share copies of the minutes with the Architect and the Owner.

12.5.13. **CM Payment Applications:** The Architect shall review and certify all of the CM payment requisitions. The Architect's certification for payment shall constitute a representation to the Owner, based on the Architect's observations at the site that, in the Architect's professional opinion, the Work has progressed to the point indicated and the quality of the Work is in accordance with the Construction Documents, subject to specific qualifications expressed by the Architect. The issuance of a certificate for payment shall further constitute a representation that the CM and the contractors are entitled to payment in the amount certified. The issuance of a certificate for payment shall not be a representation that the Architect has ascertained how or for what purpose the CM or any contractor has used money previously paid.

12.5.14. **Notices and Requests:** The Architect will promptly review and respond to all notices and requests from the Owner or the CM, including without limitation notices relating to unforeseen conditions, requests for information or interpretations relating to design documents, requests for substitutions, and questions raised by government agencies or code compliance officials.

12.5.15. **Document Interpretations:** It shall be the Architect's duty to interpret the Construction Documents on a timely basis whenever a question is raised as to the intent of the documents. All interpretations by the Architect shall be communicated to the Owner, and the Owner will be given an opportunity to comment on the interpretations, before they are communicated to the CM, the contractors or any other third party.

12.5.16. Changes and Change Orders: The Architect may authorize minor changes in the Work not involving an adjustment in the Project Cost or an extension of the Project Schedule which are consistent with the intent of the Construction Documents. All changes to the Construction Documents must be made by the Architect, regardless of who requests the change or approves it. The Architect will review all proposals for changes to the Construction Documents and the design of the Project, and will review and make recommendations to the Owner regarding approval of all change orders. If the Architect determines that requested changes in the Work are not materially different from the requirements of the Construction Documents, the Architect may issue an order for a minor change in the Work or recommend to the Owner that the requested change be denied. The Architect shall prepare change orders and construction directives for the Owner's approval and execution. If necessary, the Architect shall prepare, reproduce and distribute drawings and specifications to describe Work to be added, deleted or modified.

12.5.17. Claim Evaluations and Recommendations: The Architect shall review all claims by the CM for changes in the Project guaranteed maximum price and all claims for adjustments to the Project Schedule, and will make timely recommendations to the Owner regarding acceptance or rejection of all such claims. A properly prepared claim must be accompanied by sufficient supporting data and information to permit the Architect to make a reasonable determination without extensive investigation or preparation of additional drawings or specifications, or the Architect may recommend that the claim be denied.

12.5.18. Site Safety and Security: The Architect shall be responsible for the safety and security of its own personnel and property and the personnel and property of the Design Consultants. The Architect and its Design Consultants shall exercise due care not to harm the personnel or property of others on or about the site of the Project. The Architect shall not, however, be responsible for the safety and security of the entire Project or all of the personnel and property on or about the Project. The Architect shall have the right to bring safety and security concerns to the attention of the CM and the Owner, and shall have the right to stop the Work to avoid an imminent threat to the health and safety of persons on the Project.

12.5.19. Punchlists and Final Completion: Upon notice from the CM that the Project is substantially complete and ready for final inspections, the Architect and its Design Consultants as appropriate under the Architect's supervision shall observe the Project and prepare lists describing Work that is absent, incomplete or otherwise not in compliance with the Construction Documents. If required by the CM contract, the Architect shall determine independently whether the Project is substantially complete, and provide a certificate to the Owner and the CM that the Project is substantially complete. The Architect shall continue to observe the Project until satisfied that all identified non-conforming Work has been completed, corrected or accepted by the Owner as is. When the Architect believes that all identified non-conforming Work has been completed, corrected or accepted by the Owner as is and complies with the Construction Documents, the Architect shall provide its signed certificate that all inspections have been conducted with the degree of care and professional skill and judgment ordinarily

exercised by architects and that in the Architect's professional opinion the CM and the contractors have fulfilled the obligations of the drawings, specifications and other Construction Documents.

12.5.20. Start-Up and Occupancy Assistance: The Architect shall provide assistance in the utilization of equipment or systems such as commissioning, testing, adjusting and balancing, training personnel for operation and maintenance, and consultation during operation.

12.5.21. Warranty Inspection: No later than thirty days prior to the expiration of one year from the date of substantial completion of the Project, the Architect shall conduct an inspection of the Project with the Owner to review the operations and performance of the facilities that comprise the Project and to make appropriate recommendations to the Owner. If required by the Owner, on behalf of the Owner the Architect shall notify the CM of any breach of warranty, express or implied by law, describe the breach of warranty, and request that the CM remedy the breach of warranty. The Architect shall assist the Owner to monitor the efforts of the CM to remedy the breach of warranty until the Architect is able to certify to the Owner that the breach of warranty has been remedied.

12.5.22. Construction: The Architect shall not have control over or be responsible for construction means and methods, which will be the responsibility of the CM and the contractors under the contracts for construction. The Architect shall not be liable for the failure of the CM or the contractors to carry out the Work in accordance with the Construction Documents. The Architect shall not be responsible for the performance by the CM of the services required by the CM agreement with the Owner.

12.6. Record Documents:

12.6.1. Permit Documents: The Architect shall compile a comprehensive file of all final regulatory approvals, inspections and certificates of occupancy, and deliver it to the Owner at completion of the Project.

12.6.2. As Built Records: The Architect shall prepare a set of reproducible record drawings showing changes in the Work made during construction of the Project. The record drawings shall be based on the Architect's observations and records kept during the Project. In addition, the Architect shall use marked-up prints, drawings and other data furnished by the CM and its contractors to prepare the record drawings. The Owner shall require the CM to maintain a set of record drawings during the course of the Project, and deliver those record drawings to the Architect at the conclusion of the Project. Unless the Owner later agrees to some other format, the record drawings provided by the Architect shall consist of an electronic file in AutoCAD or other approved compatible software, and one full size set of reproducible three mil mylars, all fully and neatly coordinated and accurately annotated and cross-referenced to show all of the changes in the Work and to reference and reflect the marked-up drawings

and records provided by the CM. The mylars shall be of such quality that clear and legible prints may be made without appreciable or objectionable loss of detail.

12.6.3. Operation and Maintenance Records: The Architect shall compile a catalogue of all operation and maintenance manuals and other product literature that, by the Construction Documents, the Owner is entitled to receive from the contractors, and deliver the catalogue to the CM and the Owner. The CM will be responsible for obtaining all such required manuals and literature and delivering them to the Architect in well organized, professionally prepared binders. The Architect will review the manuals and literature and, once they have all been duly received and reviewed, certify to the Owner that the set of all such manuals and literature is complete, and deliver it to the Owner.

12.6.4. Other Project Records: In addition to the foregoing records, upon reasonable request by the Owner sufficiently early in the Project for the Architect to provide the records, the Architect shall provide the following additional records at the end of the Project:

- 12.6.4.1. Submittals received during the Project.
- 12.6.4.2. Final finish and hardware schedules.
- 12.6.4.3. Attic stock and spare parts inventories.
- 12.6.4.4. Progress photos and photos of final elevations as specified by the Owner.

### **13. Additional Services**

- 13.1. If the Architect is requested or required to perform any of the Additional Services described below in this Section, the Architect shall be entitled to additional compensation calculated as set forth in Section 16 of this Agreement. The Architect shall not perform Additional Services unless and until instructed by the Owner in writing to perform specific Additional Services. No payment for Additional Services will be made unless the Architect has notified the Owner in writing at least seven days in advance of performing the services that the Architect expects to be paid for the services as Additional Services and explaining with factual detail why it believes that the services to be provided are Additional Services. Compensation for Additional Services will only be paid for the services expressly described in this Section, upon receipt by the Owner of an invoice for such services in a form acceptable to the Owner, and subject to audit as set forth in this Agreement. If the Owner believes that the services the Architect is instructed to perform are not Additional Services, the Architect shall nonetheless perform the services with a full reservation of rights to seek compensation for the services in accordance with the dispute resolution procedures and compensation provisions in the Agreement. Additional Services include the following:

13.1.1. Making major revisions in drawings, specifications or other documents for reasons other than (i) maintaining the Fixed Limit of Project Cost, (ii) correcting errors, omissions, breaches or other failure to exercise due care by the Architect or its Design Consultants, or (iii) conforming the drawings, specifications or other documents to the written program, approvals or instructions previously given by the Owner.

13.1.2. Preparing to serve or serving as an expert witness (but not as a fact witness) for the Owner in connection with arbitration or legal proceedings unless the subject matter of the proceedings includes matters arising out of or related to the Architect's or Design Consultants' performance of services with respect to the Project; provided, however, that preparing to serve or serving as an expert witness for the Owner in proceedings to secure governmental approval(s) or clearance(s) for the Project shall not constitute an Additional Service.

13.1.3. Providing additional or extended services during the Construction Phase made necessary by (a) defective Work of the contractor(s); (b) prolongation of the time for construction by more than sixty (60) days beyond the date for final completion of the Project shown in the Milestone Listing, Attachment B referenced in Section 14 of this Agreement, provided the prolongation is not due to the fault or negligence of the Architect, its employees, consultants or agents; or (c) default under any construction contract due to delinquency or insolvency.

13.1.4. Providing consultation concerning replacement of Work damaged by fire or other casualty during construction, and furnishing services required in connection with the replacement of such Work.

13.2. The Architect will provide an estimate of the anticipated compensation for the Additional Services sufficient to update the Project budgets and the Fixed Limit of Project Cost.

#### **14. Duration of Services**

##### **14.1. Commencement of Services:**

The commencement date for the Architect's Basic Services shall be the date of delivery to the Architect from the Owner of a fully executed original of this Agreement.

##### **14.2. Time of the Essence:**

Maintenance of all aspects of the Preliminary Schedule and the Project Schedule is extremely important to the success of the Project, and time is of the essence. Attached to this Agreement is Attachment B, which is a Milestone Listing which defines the sequence and timing of the design and construction activities as planned at the time of execution of this

Agreement. The Milestone Listing is incorporated into this Agreement. The Architect and its Design Consultants shall schedule and perform their activities so as to meet the Milestone Dates and the Architect's Preliminary Schedule until such time as the CM's Project Schedule is completed and approved by the Owner and Architect. No deviation by the Architect or its Design Consultants from the Milestone Listing shall be allowed without prior written approval by the Owner.

14.3. Adherence to Project Schedules:

As set forth in Section 12 of this Agreement, the CM shall be responsible for creating and maintaining a Project Schedule. The Architect's schedule for the performance of its activities and the activities of its Design Consultants during the Construction Phase shall be reduced to writing and submitted to the Owner for review and approval and to the CM for inclusion in the Project Schedule. The Architect shall be given an opportunity to comment on the Project Schedule, and note objections to any durations or schedule logic included in the Project Schedule by the CM. Once the Owner and Architect approve the Project Schedule, it shall be binding on the Architect and the Owner. Should the Owner determine that the Architect has fallen behind schedule the Owner may require the Architect to expedite and accelerate its efforts, including providing additional manpower and/or overtime, as necessary, to perform its services in accordance with the Milestone Listing and the Project Schedule, at no additional cost to the Owner.

14.4. Changes in Duration:

If the Architect's work on the Project is or will be delayed for more than ninety (90) days beyond the final completion date in the Milestone Listing through no fault of the Architect, its employees and agents, or the Design Consultants, the Architect may request compensation for Additional Services in accordance with Section 13 of this Agreement. The Architect shall be excused from responsibility for unavoidable delays that are: (i) beyond the Architect's reasonable control or its responsibility under this Agreement (such as, but not limited to, failure by the Owner to provide timely information or approvals, or delays caused by the breach of this Agreement by the Owner), and (ii) not caused by the fault, negligence or violation of a provision of this Agreement by the Architect or its Design Consultants or defects or deficiencies in the design documents prepared by the Architect or its Design Consultants.

14.5. Outside Date for Cessation of Services:

Unless this Agreement is sooner terminated in accordance with Section 23, the Architect agrees to perform all of the services required hereunder, regardless of when the Project is finally complete, its only recourse for delay to be compensation for Additional Services in accordance with Section 13.

**15. Amendments to Agreement**

- 15.1. The Owner may, for any reason, without invalidating this Agreement, revise, amend or change the Architect's Basic Services or Additional Services under this Agreement by preparing a written Amendment to the Agreement. The Architect's compensation may then be equitably adjusted, provided that within ten (10) days of receipt of a proposed Amendment, the Architect submits to the Owner in writing a proposal for increases or decreases in the Architect's compensation with respect thereto.
- 15.2. If the Architect's proposal for changes in its compensation is agreed to by the Owner, the changes in compensation will be made part of the Amendment. If the Parties cannot agree on the changes to the Architect's compensation, the Architect will nevertheless proceed in accordance with the Amendment, and the Architect's compensation will be equitably adjusted at the end of the Project, utilizing the dispute resolution procedures in the Agreement if necessary. In the meantime, the Architect will be compensated using the rates and accounting records applicable to Additional Services under this Agreement.
- 15.3. The Architect shall proceed to perform the Services required by the Amendment only after receiving a fully executed Amendment from the Owner or a written notice from the Owner directing the Architect to proceed, whichever is earlier.

**16. Compensation**

16.1. Professional Services:

Compensation for professional services includes the following: 1) Design Development, 2) Construction Document Services, 3) Bidding & Negotiations, and 4) Other Project Specific Services through Bidding. Fees for these categories represent all compensation due the Architect from the Owner for all services under this Agreement except for Additional Services. Compensation for the referenced four categories of services consists of the following:



16.1.1. Design Development	\$ 180,090
16.1.2. Construction Drawings:	\$ 266,800
16.1.3. Bidding & Negotiation:	\$ 20,010
16.1.4. Other Project Specific Services through Bidding:	\$ 52,000
<b>TOTAL THROUGH BIDDING</b>	<b><u>\$ 518,900</u></b>

Refer to Attachment E – “Breakdown of Fees for Professional Services” for more detail.

Note: Compensation for Construction Administration, & Project Closeout are not included in the base agreement and will be added via amendment per the fees detailed in Attachment E – “Breakdown of Fees for Professional Services”.

16.1.5. In addition to the foregoing fees, the Architect shall be entitled to reimbursement for the following expenditures to the extent reasonable and actually incurred by the Architect, its employees, or its Design Consultants with respect to the Project, without any markup or premium by the Architect or the Design Consultants:

- 16.1.5.1. Actual expenditures for postage, Fedex or other rush delivery method, reproductions, photography;
- 16.1.5.2. The actual cost of reproduction of plans and specifications excluding documents for exclusive use by the Architect.
- 16.1.5.3. The cost of travel outside of Town of Zebulon, except for travel between Town of Zebulon and the permanent office of the person claiming reimbursement.
- 16.1.5.4. Permit fees and fees paid by Architect and Consultants for document reviews/approvals by authorities having jurisdiction.

16.2. Additional Services: With respect to Additional Services performed by the Architect in accordance with Section 13 or any Addendum or Amendment to this Agreement, the Architect shall be compensated in accordance with this Section of this Agreement, unless the Owner and the Architect otherwise agree in writing.

16.2.1. If requested by the Owner, the Architect’s estimate of the anticipated compensation for specific Additional Services will be converted to a lump sum fee or, alternatively, a cap on the Architect’s expenses for the Additional Services.

16.2.2. If the Owner and the Architect cannot agree on a lump sum fee or cap on expenses for Additional Services, the Owner may nonetheless direct the Architect to perform the Additional Services and compensate the Architect for the Additional Services as follows:

- 16.2.2.1. Personnel Expenses: For all personnel expenses, including direct personnel expenses such as salary and wages, payroll and unemployment taxes, insurance, and benefits, and including all indirect personnel expenses, such as general administrative and office overhead, the Architect shall be compensated at the hourly rates shown in Attachment C to this Agreement.
- 16.2.2.2. Reimbursable Expenses: In addition to the personnel expenses for Additional Services, the Architect shall be entitled to reimbursement for the expenditures described in paragraph 16.1.6 to the extent reasonable and actually incurred by the Architect, its employees, or its Design Consultants with respect to the Project.

16.3. Accounting:

Accounting records of the Architect's compensation for Reimbursable Expenses and for Additional Services pertaining to the Project shall be maintained by the Architect and its Design Consultants in accordance with generally accepted accounting practices and in sufficient detail to permit the Owner, its independent auditors, or a designee of any of them, to thoroughly evaluate and verify the nature, scope, value and charges for services performed under this Agreement. Such records shall be available for inspection and audit by the Owner or the Owner's representatives at mutually convenient times for a period of three (3) years after issuance of the Certificate of Final Completion for the Project.

16.4. Audit:

To the extent that an audit by the Owner, its independent auditors, or a designee of any of them, discloses excess charges inaccurately or improperly attributed to this Project by the Architect, the Architect agrees to remit the amount of the overpayment to the Owner within (5) five days after demand. If such audit discloses an overcharge of five percent (5%) or more of the total amount invoiced to the Owner for any year audited, the Architect shall pay the actual cost of such audit. If such audit is conducted by the Owner using in-house staff, then the Owner's actual cost of the audit shall be computed on the basis of two times the direct payroll of the audit staff completing the audit and audit report. The Architect shall include the provisions of this Section in all contracts it enters into with its Design Consultants.

**17. Payments**

**17.1. Payment for Services Rendered:**

Payment to the Architect for Services shall become due and payable monthly in proportion to satisfactory services performed and work accomplished. Payments will be made monthly by the Owner within 30 calendar days of receipt of an invoice which is in form and substance acceptable to the Owner. Each invoice shall contain a good-faith estimate by the Architect of the percent of each phase of Basic Services completed to date. In the case of Additional Services performed and compensated on a hourly (as opposed to a lump sum) basis, the Architect shall provide detailed time summaries that are broken down by timekeeper, task and time expended (block billings are not permitted). If requested, the Architect shall provide with each invoice copies of invoices, receipts and other documentation verifying the amounts of reimbursable expenses for which reimbursement is sought. In the event the Owner finds any part or parts of all or any portion of an invoice presented by the Architect not to be acceptable, it shall identify to the Architect the part or parts which are not acceptable and shall pay the part or parts of the invoice which are acceptable, if any. No deductions shall be made from the Architect's fees for Basic Services except in accordance with this Agreement or to reimburse the Owner for costs or expenses incurred or anticipated to be incurred for which the Architect is liable.

**17.2. Late Payments:**

Payments to the Architect will not be deemed overdue until more than 60 days have elapsed since an invoice for payment in good order has been received by the Owner. Interest on late payments shall be simple interest and shall be limited to the Federal Reserve prime rate of interest published in the Wall Street Journal on the date on which payment is due.

**18. Responsibilities of Owner**

**18.1. Representative:**

The Owner's Director shall act in the Owner's behalf and as its representative with respect to the Project and shall have the authority to render decisions and approve changes in the scope of the Project within guidelines established by the Town Manager and the Town Council and shall be available during working hours as often as may be reasonably required to render decisions and to furnish information.

18.2. Basic Programming:

The Owner shall meet with the Architect as necessary at mutually convenient times to describe the Owner's program to the Architect and to provide information necessary to enable the Architect to develop a detailed written analysis and complete needs summary of the Project.

18.3. Fixed Limit of Project Cost:

The Owner has provided the Architect with the initial Fixed Limit of Project Cost, and an explanation of the factors that were used to determine the Fixed Limit of Construction Cost. A copy of the initial Fixed Limit of Project Cost is included herein as Attachment E.

18.4. Project Schedule:

The Owner has provided the Architect with the Milestone Listing, included herein as Attachment B, and will be responsible for the development of a Project Schedule with the assistance of the CM and the Architect.

18.5. Cooperation and Decisions:

The Owner shall examine documents submitted by the Architect and shall make reasonable efforts to render decisions pertaining thereto no later than the dates specified in the schedule for such decisions described in Section 14 of this Agreement.

18.6. Insurance and Accounting:

The Owner shall furnish all accounting and insurance counseling services as may be necessary at any time for the Project, including auditing services the Owner may require to verify the CM's applications for payment or to ascertain how or for what purposes the CM and its contractors have used the money paid by or on behalf of the Owner.

18.7. Permits and Approvals:

The Owner shall secure and pay for all necessary permits, licenses, approvals, easements, assessments and charges required for the construction, use or occupancy of permanent structures or for permanent changes in existing facilities. The Architect shall provide the Owner with a schedule of all required approvals and of the dates by which application for such approvals must be made in order to avoid any risk of delay to the Project, prepare

necessary application forms, present documents requiring approval by the Owner and submit documents with the Owner's approval to the appropriate approval agency.

18.8. Surveys:

The Owner shall furnish the Architect with a certified land survey of the site, giving, as applicable, grades and lines of streets, alleys, pavements and adjoining property; rights-of-way, restrictions, easements, encroachments, zoning, deed restrictions, boundaries and contours of the site; locations, dimensions and complete data pertaining to existing buildings, other improvements and trees, and other pertinent information reasonably requested by the Architect including that concerning available service and utility lines, both public and private, above and below grade, including inverts.

18.9. Geotechnical:

The Owner shall provide the services of a geotechnical engineer or other consultant, when such services are reasonably deemed necessary by the Architect as shown on the Architect's schedule described in Section 14 of this Agreement, to provide reports, test borings, test pits, soil bearing values, percolation tests, soil, air and water pollution tests, ground corrosion and resistivity tests and other necessary operations for determining subsoil, air and water conditions, all together with reports and appropriate professional recommendations.

18.10. Construction and Materials Testing:

The Owner shall furnish services by qualified testing firms for structural, mechanical, chemical, and materials tests required by law or the Construction Documents. The Architect shall cooperate with the Owner to determine necessary or advisable testing services, and assist the Owner with the review of proposals for such services.

18.11. Special Inspections:

To the extent special inspections are required by law, by any building official with jurisdiction, or by the Construction Documents, the Owner will provide the services of a qualified special inspections firm (or firms) to conduct special inspections. The Architect shall cooperate with the Owner to determine necessary or advisable special inspections, and assist the Owner with the review of proposals for such services.

18.12. General:

All services, data, information, surveys and reports required of the Owner pursuant to this Section 18, shall be furnished at the Owner's expense and, absent any negligence or failure to follow professional standards on the part of Architect, the Architect shall be entitled to rely upon the accuracy and completeness of such services, data, information, surveys and reports.

**19. Liability for Errors, Omissions and Cost Overruns**

19.1. Independent Contractor:

The Architect is and shall at all times remain as to the Owner a wholly independent contractor. Neither the Owner nor any of its agents shall have control over the conduct of the Architect or any of the Architect's officers, agents or employees, except as herein set forth.

19.2. Professional Liability:

The Architect shall reimburse the Owner for direct costs, damages and expenses, including attorney's fees, incurred by the Owner when such costs, damages and expenses are the result of delay, or negligent error or omission of the Architect or its Design Consultants in the performance of their professional services.

19.3. General Liability:

The Architect shall reimburse the Owner for any costs, damages and expenses, including attorney's fees, incurred by the Owner when such costs, damages and expenses are the result of any failure of the Architect or its Design Consultants to exercise due care to avoid causing harm or injury as required by law.

19.4. Liability for Design Consultants:

The Architect shall be liable to the Owner for the errors, omissions, breaches or other failure to exercise the recognized standard of care by the Design Consultants, notwithstanding their status as independent contractors or independent professionals.

19.5. Limitations on Liability:

To the extent that the direct damage, expense or cost to the Owner for all delay, negligent errors, premium value of omissions by the Architect is less than one-half of one percent

(0.5%) of the Fixed Limit of Project Cost, the Architect shall not be liable to the Owner for such damages, expenses or costs. If the aggregate damage, expense or cost to the Owner for such errors, omissions or delays of the Architect amounts to more than one-half of one percent (0.5%) of the Fixed Limit of Project Cost, the Architect shall reimburse the Owner for all such damages, expenses or costs in excess of said one-half of one percent (0.5%).

**20. Environmental Hazards and Liability**

20.1. Unless otherwise provided in this Agreement, the Architect and Design Consultants shall have no responsibility for the discovery, presence, handling, removal or disposal of or exposure of persons to hazardous materials in any form at the Project site, including but not limited to asbestos, asbestos products, polychlorinated biphenyl (PCB) or other toxic substances.

**21. Insurance**

21.1. Owner's Insurance Option:

At any time during the performance of this Agreement, the Owner may, at its sole option, provide for itself, for the Architect and for its Design Consultants any or all of the insurance coverage required under this Article. If the Owner elects to provide such coverage, it shall notify the Architect in writing and provide to the Architect such certificate or certificates of coverage as may be applicable. If the Owner elects to provide such coverage, it shall be entitled to pro rata reduction in the fees for Basic Services equal to the cost of providing such coverage to the Architect and its Design Consultants.

21.2. Owner Provided Insurance:

21.2.1. The Owner shall be responsible for purchasing and maintaining the Owner's usual liability insurance.

21.2.2. Unless otherwise provided, the Owner shall purchase and maintain, or cause the CM or the contractors to purchase and maintain, until Project completion, property insurance written on a builder's risk "all-risk" or equivalent policy form in the amount of the entire Project construction cost on a replacement cost basis without optional deductibles. Property insurance shall be on an "all-risk" or equivalent policy form and shall include, without limitation, insurance against the perils of fire (with extended coverage) and physical loss or damage including, without duplication of coverage, theft, vandalism, malicious mischief, collapse, earthquake, flood, windstorm, falsework, testing and startup, temporary buildings and debris removal including demolition occasioned by enforcement of any

applicable legal requirements and shall cover reasonable compensation for the Architect's services and expenses required as a result of such insured loss. The Owner and the Architect waive all rights against each other and their respective Design Consultants, contractors and the CM for damages caused by fire or other causes of loss to the extent covered by property insurance obtained pursuant to this Paragraph or other property insurance applicable to the Work. The Owner and the Architect, as appropriate, shall require of the CM, the Design Consultants, separate contractors, if any, and the subcontractors, sub-subcontractors, agents and employees of any of them, by appropriate agreements, written where legally required for validity, similar waivers each in favor of other parties enumerated in this Paragraph. The policies shall provide such waivers of subrogation by endorsement or otherwise. A waiver of subrogation shall be effective as to a person or entity even though that person or entity would otherwise have a duty of indemnification, contractual or otherwise, did not pay the insurance premium directly or indirectly, and whether or not the person or entity had an insurable interest in the property damaged. If during the Project the Owner insures properties, real or personal or both, at or adjacent to the site by property insurance under policies separate from those insuring the Project, or if after final payment property insurance is to be provided on the completed Project through a policy or policies other than those insuring the Project during the construction period, the Owner shall waive all rights in accordance with the terms of this paragraph for damages caused by fire or other causes of loss covered by this separate property insurance. All separate policies shall provide this waiver of subrogation by endorsement or otherwise.

21.3. Architect Provided Insurance:

21.3.1. General: The Architect shall, without limiting its obligations or liabilities, procure and maintain such insurance as is required by law and as is required by this Agreement to protect the Architect and the Owner from claims for damages for bodily injury, including death, and from claims for property damage which may arise from the Architect's or its Design Consultants' or employees' operations under this Agreement. Such insurance shall be of the kinds and have limits of liability and coverages not less than the minimum limits hereinafter specified or required by law, whichever is greater. The Owner makes no representation as to the adequacy or sufficiency of such coverages. The following requirements shall in no way be construed to limit or eliminate the liability of the Architect that arises from performance of services under the Agreement. The Architect is strictly responsible for any losses, claims and costs of any kind which exceed the Architect's limits of liability, or which may be outside the coverage scope of the policies.

21.3.2. Insurers and Proof of Insurance: The insurance specified shall be provided by an insurer approved by the Owner, authorized to do such business in the State of North Carolina, and on terms approved by the Owner. Insurance companies utilized shall have a minimum rating of A+, as evaluated by the most current A.M. Best Rating Guide. If the insurer has a Best Rating less than A+, the Architect must receive specific written approval from the Owner prior to proceeding. Before providing services



under the Agreement, the Architect shall furnish to the Owner a certificate or certificates of insurance in a form satisfactory to the Owner. Upon request of the Owner, the Architect shall provide the Owner with certified copies of the insurance policies required by this Section, including without limitation declaration pages, conditions, exclusions and endorsements and confirmation that each policy premium has been paid for the required term of this Agreement. Certificates shall be signed by a person authorized by that insurer to bind coverage on its behalf. All insurance policies shall provide, as evidenced by Certificates of Insurance, that the insurance shall not expire and shall not be canceled, reduced, materially restricted, or changed in any way without at least 30 days prior written notice to the Owner, except for cancellation for non-payment of premium, in which case ten (10) days notice shall be given. To the extent that the insurance policy does not provide this information, architect shall provide notice of cancellation, reduction, or material restriction or change upon the same terms and conditions. With regard to expiration, cancellation, reduction, restriction or any other change, certificates shall state: "Should any of the following described policies be canceled before expiration date or be due to expire within 30 days, the insurer shall mail 30 days prior written notice to named certificate holder". In the event of any such cancellation, non-renewal, , restriction or change in any insurance, the Architect is obligated to replace such insurance within 7 days without a gap in coverage and file accordingly such notice with the Owner, and other interested parties. In the event that claims asserted by third-parties against the Architect in any given policy year which are covered by Professional Liability Insurance collectively exceed \$1,000,000 in the aggregate, the Architect will immediately notify Owner. Following such notification, the Architect and Owner will jointly reassess the risk and insurance needs relating to the Services provided by the Architect under this Agreement. If it is agreed that additional Professional Liability insurance coverage is required to ensure a mutually agreed level of coverage remains available for the Project, and such additional coverage is available, such additional Professional Liability insurance will be procured by Architect. The Architect will provide Owner with such evidence of the insurance coverage as Owner may reasonably request. Failing immediate receipt of evidence of such replacement of insurance, the Owner reserves the right to procure such insurance as the Owner considers desirable and the Architect shall pay the premium in respect thereof. It is expressly provided, however, that any action or inaction on the part of the Owner in this respect shall in no way change or reduce the Architect's responsibilities and liabilities under this Agreement. Self-funded, policy fronting or other non-risk transfer insurance mechanisms are not acceptable without prior written approval of the Owner. Full disclosure of such a program must be made prior to commencing mobilization to the site. Failure to make a full disclosure constitutes a material breach of the Agreement, justifying termination of the Agreement for default.

21.3.3. Owner Coverage: The Architect shall name the Owner as additional insured under all its insurance contracts (except workers' compensation and professional liability) with respect to and including without limitation liability arising out of activities performed by or on behalf of the Architect, and automobiles owned, hired, leased or borrowed by the Architect. The coverage shall contain no special limitations on the scope of protection afforded to the Additional Insured.

21.3.4. Order of Coverage: For any claims related to this Project, the Architect's insurance shall be primary and noncontributory as respects the Owner. Any insurance or self-insurance maintained by the Owner shall be excess and noncontributory of the Architect's insurance.

21.3.5. Subrogation: All policies of insurance shall contain a clause waiving rights of subrogation against the Owner, unless the Owner approves otherwise in writing.

21.3.6. Deductibles: Limits of coverage are not to be amended by deductible clauses of any nature without the express written consent of the Owner. The Architect shall be solely responsible for any deductible assumptions that exist in any insurance policies required under this Agreement. In addition, the Architect shall be responsible and shall not be reimbursed for any losses arising from any risk or exposure not insured as required herein, or not covered as a result of a policy exclusion.

21.3.7. Separate Insureds: The Architect's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.

21.3.8. Duty to Defend: Any phrase in any policy of insurance covering the Architect stating the intent that "the company has no duty to defend or indemnify against any claim or suit expressly excluded from coverage" must be deleted or shall be construed to be interpreted consistent with the requirements of G.S. 22B-1. . . The claim provisions must specifically state the insurance company has both the right and the duty to adjust a claim and provide defense.

21.3.9. Third Party Claims: The policies shall not contain any provision or definition which would serve to exclude or eliminate from coverage third party claims, including exclusions of claims for bodily or other injury to shareholders, partners, officers, directors or employees of the insured, the premises owner, real estate manager, the general contractor to which the insured is subcontracted, or the insured's subcontractor or any family relative of such persons.

21.3.10. Government Regulations: If the policies contain any warranty stating that coverage is null and void (or words to that effect) if the Architect does not comply with the most stringent regulations governing the Services, it shall be modified so that coverage shall be afforded in all cases except for the Architect's willful or intentional noncompliance with applicable government regulations.

21.3.11. Insolvency: The insolvency or bankruptcy of the insured or of the insured's estate shall not relieve the insurance companies of their obligations under these policies. Any clauses to the contrary are unacceptable and must be stricken.

21.3.12. Breach of Insurance Obligation: Failure to comply with these requirements shall be a material breach of this Agreement justifying termination of the Agreement for default.

21.3.13. Professional Liability Insurance: Upon execution of the Agreement and during the entire period of the Architect's responsibility under the Agreement, the Architect shall maintain professional liability insurance with limits of \$2,000,000 per claim and in the aggregate, with a maximum of \$200,000 deductible per claim. The Architect shall file with the Owner a certificate of insurance from an insurance company licensed to do business in the State of North Carolina showing evidence of professional liability insurance (errors and omissions insurance). If demanded in writing by the insurer, the deductible limit may be increased to not in excess of the limit established for the Architect under the usual deductible guidelines of the insurer. This certificate shall bear an endorsement in words exactly as follows: "The insurance company certifies that the insurance covered by this certificate has been endorsed as follows: This insurance company agrees that the coverage shall not be canceled, allowed to lapse, or allowed to expire until (30) thirty days after notice to Owner.

21.3.14. Worker's Compensation and Employers' Liability Insurance: The Architect and its Design Consultants shall procure and maintain workers' Compensation Insurance in the amount and type required by the State of North Carolina and federal law for all employees employed under the Agreement who may come within the protection of workers' Compensation Laws and covering all operations under the Agreement whether performed by the Architect or by its Design Consultants. In jurisdictions not providing complete workers' Compensation protection, the Architect and its Design Consultants shall maintain employers' liability insurance in an amount, form, company and agency satisfactory to the State and the Owner for the benefit of all employees not protected by workers' Compensation Laws and covering all operations under the Agreement whether performed by the Architect or by its Design Consultants.

21.3.14.1. The Architect shall pay such assessments as will protect the Architect and the Owner from claims under the workers' Compensation Laws, workers' or workmen's compensation disability benefits and other similar employee benefit acts.

21.3.14.2. Coverage under this Section shall be as required by federal and state workers' Compensation and Occupational Disease Statutes and shall have minimum limits as follows:

Employers' Liability: Each Accident	\$1,000,000
Disease - Policy Limit	\$1,000,000
Disease - Each Employee	\$1,000,000

21.3.14.3. Any and all Occupational Disease Exclusions must be deleted. Such insurance shall include Voluntary Compensation coverage, a Waiver of

**AGREEMENT FOR DESIGN PROFESSIONAL SERVICES**  
**ZEBULON FIRE AND EMS STATION**

Subrogation in favor of the Owner as well as other endorsements that may be required by applicable jurisdictions.

21.3.15. General Liability (GL) Policy: The Architect and the Design Consultants shall maintain General Liability Insurance, written on an occurrence basis, with at least the following limits of liability:

General Aggregate	2,000,000.00
Completed Operations Aggregate	2,000,000.00
Personal and Advertising Injury	1,000,000.00
Each Occurrence (Loss)	1,000,000.00
Fire Damage - Any One Fire	50,000.00
Medical Expense - Any One Person	5,000.00
Deductible Each Loss	1,000.00

Coverage shall remain continuously in effect for at least 6 years from the date of Substantial Completion. The Architect shall furnish the Owner evidence satisfactory to the Owner of continuation of such insurance annually on the anniversary of the effective date of this Agreement. The insurance shall contain or be endorsed to include the following:

- 21.3.15.1. Project specific limits, dedicated to services performed under this Agreement only.
- 21.3.15.2. Blanket Contractual Liability covering indemnification obligations under this Agreement, in accordance with ISO policy form CG 00 01. Modifications to the standard provision will not be acceptable if they serve to reduce coverage.
- 21.3.15.3. Premises/Operations Liability.
- 21.3.15.4. Independent Contractor and Independent Subcontractor coverage.
- 21.3.15.5. Broad Form Property Damage.
- 21.3.15.6. Personal Injury.
- 21.3.15.7. Cross Liability/Severability of Interest clause.
- 21.3.15.8. Employer's Stop-Gap Liability endorsement, if applicable.

21.3.16. Automobile Liability Insurance: The Architect shall procure and maintain insurance against liability for bodily injury and property damage as described below, that may arise with respect to the Services being performed under the Agreement, and as will provide protection from claims which may arise out of or result from the Architect's performance of the Services and the Architect's other obligations under the Agreement, whether such performance of the Services is by the Architect, by any Design Consultant, by anyone, both officially and personally, directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable.

21.3.16.1. This policy of insurance shall carry a combined Single Limit of Liability of \$1,000,000.

21.3.16.2. The policy of insurance shall contain or be endorsed to include Owned, Hired, and Non-Owned Automobile Liability.

21.3.17. Property Insurance: The Architect is responsible for all physical damage to owned or rented machinery, tools, equipment and other items owned, rented or used by the Architect and/or the Design Consultants in the performance of the Services provided under this Agreement. The insurance coverage evidencing such shall include a waiver of subrogation in favor of the Owner.

21.3.18. Valuable Papers and Records: The Architect shall provide valuable papers and records insurance with coverage in the amount of \$100,000.00 per occurrence.

21.3.19. Claims: The Architect shall notify the Owner within 24 hours of any claims or alleged claims related to work performed hereunder received by the Architect. The Architect shall provide a written copy of the claim or alleged claim to the Owner within 3 days of the Architect's receipt of the claim or alleged claim. If a claim is settled to the satisfaction of the claimant, the Architect shall submit a copy of the claimant's release to the Owner. If a claim or alleged claim is rejected by the Architect and/or its insurance company, the Architect shall immediately report this fact to the Owner. Should 30 days elapse after the claim or alleged claim has been received by the Architect, and the Architect is not able to report a settlement or rejection of the claim, its shall report to the Owner the steps being taken with respect to the claim.

21.3.20. Deductibles and Self-insured Retentions: Any deductibles or self-insured retentions must be declared to and approved by the Owner. At the option of the Owner, either: (i) the insurer shall reduce to a maximum of \$250,000 or eliminate such deductibles or self-insured retentions as respects the Owner, or (ii) the Architect shall procure a bond guaranteeing payment of losses and related investigations, claim administration and defense expenses within the deductible or self-insured retention

amount. Any self-insured retention or deductible amount on the policy shall not reduce the amount of collectible limits or liability.

21.3.21. Consultants and Subcontractors: The Architect shall include all Design Consultants as insureds under its policies, or shall furnish separate certificates, policies and endorsements for each Design Consultant the Architect intends to use. Except as otherwise approved by the Owner in writing, limits of liability and coverage scope must be at a minimum as stringent as required of the Architect by the Agreement.

21.3.22. Architect as Joint Venture: If the Architect is completing this Project on a joint venture basis, each participant in the joint venture retains all liabilities assumed by this Agreement, individually and collectively. This may include, but is not limited to, all premiums due, deductibles/self-insured retentions, coinsurance provisions, claim provisions, insurance policy conditions and indemnification provisions under the Agreement. Evidence of a Blanket Joint Venture Endorsement must be obtained from the general liability and professional liability carriers of each joint venture participant for a period of 7 years after completion of the Project, substantially as follows:

"With respect to "your work", and the "products-completed operations hazard", you are an insured for your liability arising out of the conduct of any partnership or joint venture of which you were a partner or member, even though this partnership or joint venture is not shown as a Named Insured in the Declarations. This coverage is excess over any available liability insurance purchased specifically to insure the partnership or joint venture. This coverage will not inure to the benefit of any other party except you."

## **22. Indemnity**

22.1. To the fullest extent permitted by North Carolina law, including but not limited to G.S. 22B-1, the Architect agrees to indemnify, defend and hold harmless the Owner and its officers, employees, representatives, volunteers and insurers, utilizing legal counsel reasonably acceptable to the Owner, from all loss, liability, expense, including, without limitation all reasonable fees and expenses of engineers, architects, attorneys, and experts and all court, arbitration or other dispute resolution costs incurred to defend against third party claims alleged in any court, tribunal, or alternative dispute resolution (ADR) procedure, including reasonable attorneys' fees, litigation or arbitration expenses, or court costs, which arise out of or result from, any of the following, but only to the extent caused by the negligence or willfull misconduct of the Architect:

22.1.1. Any negligent act or omission of Architect or its Design Consultants or any person or entity to whom any of them may be liable;

22.1.2. The material inaccuracy of any representation by Architect given in accordance with or contained in this Agreement;

22.1.3. Any claim arising from bodily injury, including death, personal injury, or property damage or other loss, by any third person or entity, arising out of a negligent act or omission of Architect, its Design Consultants or any person or entity to whom any of them may be liable; or

22.1.4. Infringement upon any United States or common law patent, trademark or copyright arising out of the actual negligent acts or omissions of Architect or its Design Consultants, in connection with performance of this Agreement;

22.2. Provided, however, that nothing herein shall be interpreted as obligating Architect to indemnify any indemnitee against the indemnitee's whole or partial active negligence or willful misconduct.

### **23. Suspension and Termination**

#### 23.1. Suspension:

The Owner may by written order direct the Architect to suspend, delay or interrupt all or any part of its Services on the Project for the convenience of the Owner. A suspension, delay or interruption of the Project shall not terminate this Agreement; provided, however, that if such suspension, delay or interruption causes a suspension of the Architect's Services for a period exceeding ninety (90) consecutive days, the Architect's compensation for Basic Services may be equitably adjusted. In the event the Architect believes that any suspension, delay or interruption of any or all of the Work on the Project might require an extension of the duration of Basic Services or an increase in the level of staffing by the Architect, it shall so notify the Owner and propose an amendment to the Agreement for consideration by the Owner in accordance with Section 15 of the Agreement.

#### 23.2. Termination for Convenience:

This Agreement may be terminated without cause by the Owner and for its convenience upon seven (7) days written notice to the Architect. In the event of termination for the convenience of the Owner, the Architect shall be paid that portion of its fees and expenses that it has

earned to the date of termination less any costs or expenses incurred or anticipated to be unearned by the Owner due to errors or omissions of the Architect.

23.3. Termination for Default:

After seven (7) days written notice to the other Party of its material breach of the Agreement, this Agreement may be terminated by the noticing Party, provided that the other Party has not taken all reasonable actions to remedy the breach.

23.4. Compensation After Termination for Default:

If a Party to this Agreement justifiably terminates the Agreement due to a default by the other Party, the final compensation owed to the Architect shall be as follows:

23.4.1. In the event of termination by reason of a material breach of the Agreement by the Owner, the Architect shall be entitled to the same compensation it would have received had the Owner terminated the Agreement for convenience, and the Architect expressly agrees that said compensation is fair and appropriate as liquidated damages for any and all costs and damages it might incur as a result of such termination.

23.4.2. In the event of termination by reason of a material breach of the Agreement by the Architect, the Architect shall be paid that portion of its fees and expenses that it has earned to the date of termination, less any damages, costs or expenses incurred or anticipated to be incurred by the Owner due to errors or omissions of the Architect or by reason of the Architect's breach of this Agreement.

23.5. Disposition of Documents:

Should this Agreement be terminated for any reason prior to completion of the Project, the Owner shall be granted, at no additional cost, ownership and use of all documents, including drawings, specifications, electronic data bases and other materials, relating to the Project, prepared by or in the possession of the Architect. The Architect shall turn over to the Owner within seven (7) days and in good unaltered condition reproducible sets of all such documents. In the event of such termination, and should the Owner use such documents for completion of the Project, the Owner agrees to release the Architect from any responsibility should the portions of the Project completed after the date of termination fail to conform to such documents, and agrees, if and to the extent allowed by State law, to indemnify and hold the Architect harmless from any and all liability, costs and expenses (including reasonable legal fees and disbursements) for loss of life, personal injury or damage to tangible property which occur subsequent to the termination of this



Agreement and which result from causes other than failure by the Architect or its Design Consultants to exercise due care in the preparation of the documents. The Architect specifically agrees to incorporate the provisions of this paragraph in all contracts for the services of Design Consultants. The Owner agrees that the Architect may retain one set of drawings for its records.

**23.6. Completion of Documents:**

Should this Agreement be terminated, the Owner shall, nevertheless, have the right to require the Architect and/or its Design Consultants to complete such services as may be necessary to providing professionally certified and sealed drawings and to deliver to the Owner such certified and sealed drawings with respect to any phase or item of the Project, for which effort the Architect shall be compensated in accordance with the compensation provisions of this Section of the Agreement.

**24. Ownership of Documents**

**24.1. Ownership and Use by Owner:**

All documents, including designs, drawings, specifications, design calculations, notes, electronic data bases and other works developed in the performance of this Agreement, including as-built and other record documents, shall become the property of the Owner whether the Project is constructed or not, and may be used on this Project or any other project for any purpose including, without limitation, future additions, alterations, connections, repairs, information, reference, use or occupancy of the Project, all without additional compensation to the Architect. The Architect shall have no lien or custodial rights in such documents developed in the performance of this Agreement, and the Architect agrees to provide all such documents to the Owner upon request notwithstanding any dispute or disagreement over payment or performance under this Agreement. The use of the documents by the Owner for any purpose other than the Project as set forth in this Agreement shall be at the sole risk of the Owner, and the Architect shall have no liability to the Owner for the use of the documents for any such other purpose. The Owner also agrees, if and to the extent allowed by State law, to indemnify and hold the Architect harmless from any and all liability, costs and expenses (including reasonable legal fees and disbursements) for loss of life, personal injury or damage to tangible property which arise out of the use of the documents by the Owner for any purpose other than the Project as set forth in this Agreement and which are not caused by a failure by the Architect or its Design Consultants to exercise due care in the preparation of the documents.

24.2. Copyrights:

The Architect shall be deemed to have assigned in perpetuity, with no reserved or retained rights to Architect or to any other persons or entities, all common law, statutory and other reserved rights to use of the designs, drawings, specifications, design calculations, notes and other works developed in the performance of this Agreement to the Owner, including the copyright. The Architect shall insure that a similar assignment of rights is given to the Owner by the Design Consultants. The Architect and its Design Consultants shall be permitted to retain copies, including reproducible copies, of their drawings, specifications and other documents for record information and reference.

24.3. Use by Architect:

The Owner hereby grants to the Architect and its Design Consultants a license, revocable at the will of the Owner, to use and copy the designs, drawings, specifications, design calculations, notes and other works developed in the performance of this Agreement and the designs depicted in them, during the term of this Agreement for the sole purpose of performing the services required under this Agreement. With the exception of (i) standard and generic details in the design documents, and (ii) other designs or details that do not involve a replication of the overall building design or aesthetic appearance, the design documents shall not be used or replicated as a whole, or in substantial part, by the Architect on other projects.

24.4. Advertising and Promotional Materials:

The Architect and its Design Consultants shall have the right to include representations of the design of the Project, including photographs of the exterior and interior, among their promotional and professional materials. Such promotional materials shall not include the Owner's confidential information. The Owner shall provide professional credit for the Architect and its Design Consultants on the construction sign and in the promotional materials for the Project as deemed appropriate by the Owner.

**25. Confidentiality**

25.1. The Architect and its Design Consultants shall use their best efforts not to disclose or permit the disclosure of any confidential information, designated "confidential" by Owner in writing, relating to the Project, except to its agents, employees and other consultants who need such confidential information in order to properly perform their duties relative to this Agreement.

25.2. Public Records: Notwithstanding the foregoing paragraph, and consistent with the RFP, the Architect acknowledges that its designs, drawings, specifications, design calculations, notes and other works developed in the performance of this Agreement will become public records, and will be subject to public disclosure. North Carolina General Statutes Section 132-1.2 and 66-152 provide a method for protecting some documents from public disclosure. If the Architect follows the procedures prescribed by those statutes and designates a document "confidential" or "trade secret", the Owner will withhold the document from public disclosure to the extent that it is entitled or required to do so by applicable law. If the Owner determines that a document that the Architect has designated "confidential" or "trade secret" is not entitled to protection from public disclosure, the Owner will notify the Architect of that determination at least five business days prior to its public disclosure of the document. If the Architect does not initiate judicial proceedings to protect the confidentiality of the document, the Owner will not have any obligation to withhold the document from public disclosure. By submitting to the Owner a document that the Architect designates as "confidential" or "trade secret", the Architect agrees that in the event a third party brings any action against the Owner or any of its officials or employees to obtain disclosure of the document, the Architect will indemnify and hold harmless the Owner and its affected officials and employees from all costs, including attorney's fees, incurred by or assessed against them defending against such action. The Architect also agrees that at the Owner's request the Architect will intervene in any such action and assume all responsibility for defending against it, and that the Architect's failure to do so will relieve the Owner of all further obligations to protect the confidentiality of the document.

**26. Waiver**

- 26.1. The payment of any sums by the Owner under this Agreement or the failure of the Owner to require compliance by the Architect with any provisions of this Agreement or the waiver by the Owner of any breach of this Agreement shall not constitute a waiver of any claim for damages by the Owner for any breach of this Agreement or a waiver of any other required compliance with this Agreement by the Architect.
- 26.2. Occupancy by the Owner of the Project when complete shall not constitute acceptance of Work not complying with requirements of the Construction Documents, whether such non-compliance is known or unknown. The Owner's inspection and any notice of objection are made solely for the purpose of determining whether the Owner will occupy the Project. No occupancy of the Project shall relieve the Architect of its contractual or professional obligations to the Owner or in any way preclude the Owner from asserting any claims or demanding redress of any non-compliance of the Work with the Construction Documents,

whether known or unknown. No objection or specification of the basis for the objection shall relieve the Architect of its contractual or professional obligations to the Owner or in any way preclude the Owner from asserting any claim or demanding redress of any non-compliance of the Work with the Construction Documents, whether known or unknown, and whether or not such claim or non-compliance is specified as a basis for the Owner's objection.

- 26.3. Except as expressly stated in Section 19, nothing set forth in any provision of this Agreement shall be interpreted as a limitation upon any of the Owner's rights or remedies that may exist under law or in equity.

**27. Assignment**

- 27.1. The Owner and the Architect each bind themselves, their successors, assigns and legal representatives to the terms of this Agreement.
- 27.2. The Architect shall not assign or transfer its right to payment or other commercial interest in this Agreement without the written consent of the Owner.
- 27.3. The Architect shall not delegate any of its duties under this Agreement except strictly in accordance with its terms.
- 27.4. Change in Ownership: The Architect shall notify the Owner within seven (7) days of any change in the ownership of the Architect.

**28. Governing Law**

- 28.1. This Agreement and the duties, responsibilities, obligations and rights of respective parties hereunder shall be governed by the laws of the State of North Carolina.

**29. Dispute Resolution**

- 29.1. Jurisdiction and Venue: Any and all suits or actions to enforce, interpret or seek damages with respect to any provision of, or the performance or non-performance of, this Agreement shall be brought in the General Court of Justice of North Carolina sitting in Town of Zebulon, North Carolina, and it is agreed by the parties that no other court shall have jurisdiction or venue with respect to such suits or actions.
- 29.2. Mediation: Attachment D, Mediation, shall be a part of this Agreement. Prior to initiating any civil action to enforce, interpret or seek damages with respect to any provision of, or the

performance or non-performance of, this Agreement, any Party to this Agreement shall initiate the mediation process as provided in Attachment D. The Design Consultants shall be Parties for purposes of this Section and Attachment D. The Architect, by means of its contracts with its Design Consultants, shall specifically require its Design Consultants to be bound by this Section and Attachment D.

29.3. Continuing Obligation to Perform: The Architect shall, notwithstanding the existence of a dispute between the Owner and the Architect, maintain the continuous and uninterrupted performance of its obligations under this Agreement.

29.4. The Architect waives its right to a trial by jury in any action brought by or against the Owner under this Agreement or arising out of this Project.

**30. Severability**

30.1. If any provision of this Agreement is held as a matter of law to be unenforceable, the remainder of this Agreement shall be enforceable without such provision.

**31. Binding Effect**

31.1. The Architect binds itself and its partners, shareholders, members, affiliates, successors, assigns and legal representatives to this Agreement.

**32. E-Verify**

32.1. To ensure compliance with the E-Verify requirements of the General Statutes of North Carolina, all contractors, including any subcontractors employed by the contractor(s), by submitting a bid, proposal or any other response, or by providing any material, equipment, supplies, services, etc, attest and affirm that they are aware and in full compliance with N.C.G.S. Chapter 64, Article 2 (N.C.G.S. 64-26(a)) relating to the E-Verify requirements.

**33. Relationship of Parties**

33.1. Architect is an independent contractor of the Town. Consultant represents that it has or will secure, at its own expense, all personnel required in performing the services under this Agreement. Such personnel shall not be employees of or have any contractual relationship with the County. All personnel engaged in work under this Agreement shall be fully qualified and shall be authorized or permitted under state and local law to perform such services. It is further agreed that the Consultant will obey all State and Federal statutes, rules and

regulations that are applicable to provisions of the services called herein. Neither Consultant nor any employee of the Consultant shall be deemed an officer, employee or agent of the Town.

**34. No Waiver of Sovereign Immunity**

- 34.1. Town of Zebulon and the Consultant agree that nothing in this Agreement shall be construed to mandate purchase of insurance by Town of Zebulon pursuant to N.C.G.S. 153A-435; or to be inconsistent with Town of Zebulon's "Resolution Regarding Limited Waiver of Sovereign Immunity" enacted October 6, 2003; or to in any other way waive Town of Zebulon's defense of sovereign or governmental immunity from any cause of action alleged or brought against Town of Zebulon for any reason if otherwise available as a matter of law.

**35. Non-Appropriation**

- 35.1. Consultant recognized that Town of Zebulon is a governmental entity, and the contract validity is based upon the availability of public funding under the authority of its statutory mandate. In the event that public funds are not available and not appropriated to purchase the services specified in this Agreement, then this Agreement shall automatically expire without penalty to Town of Zebulon and without the thirty (7) day notice requirement set forth in Article 11.
- 35.2. In the event of a legal change in Town of Zebulon's statutory authority, mandate, and mandated functions which adversely affects Town of Zebulon's authority to continue its obligations under this Agreement, then this Agreement shall automatically expire without penalty to Town of Zebulon and without the thirty (7) day notice requirement set forth in Article 11.

**36. Iran Divestment and Divestment from Companies Boycotting Israel**

- 36.1. By signing this agreement; accepting this contract/purchase order; or submitting any bid, proposal, etc., vendors and contractors certify that as of the date of execution, receipt, or submission they are not listed on the Final Divestment List created by the NC Office of State Treasurer pursuant to NCGS 147 Article 6E, Iran Divestment Act, Iran Divestment Act Certification. Vendors and contractors shall not utilize any subcontractor that is identified on the Final Divestment List.
- 36.2. Any organization defined under NCGS 147-86.80(2), Divestment from Companies Boycotting Israel, shall not engage in business totaling more than \$1,000 with any

company/business, etc. that boycotts Israel. A list of companies that boycott Israel is maintained by the NC Office of State Treasurer, pursuant to NCGS 147-86.81(a)(1). Any company listed as boycotting Israel is not eligible to do business with any State agency or political subdivision of the State.

**37. Anti-Discrimination**

In consideration of signing this Agreement, the Parties hereby agree not to discriminate in any manner on the basis of race, natural hair or hairstyles, ethnicity, creed, color, sex, pregnancy, marital or familial status, sexual orientation, gender identity or expression, national origin or ancestry, marital or familial status, pregnancy, National Guard or veteran status, religious belief or non-belief, age, or disability with reference to the subject matter of this Contract. The Parties agree to comply with the provisions and intent of Town of Zebulon Ordinance SL 2017-4. This anti-discrimination provision shall be binding on the successors and assigns of the Parties with reference to the subject matter of this Contract.

**38. List of Attachments**

38.1. The following Attachments are incorporated herein and made a part of this Agreement by reference:

- 38.1.1. Attachment A - Consultant's Key Personnel
- 38.1.2. Attachment B – Project Milestone Dates
- 38.1.3. Attachment C - Consultant's Hourly Rates
- 38.1.4. Attachment D – Mediation
- 38.1.5. Attachment E – Breakdown of Fees for Professional Services
- 38.1.6. Attachment F – adw's Schematic Design and Program Documents
- 38.1.7. Attachment G – USDA Grand Agreement Requirements
- 38.1.8. Attachment H – Additional USDA Grant Requirements

**39. Extent of Agreement**

39.1. This Agreement represents the entire and integrated agreement between the Owner and the Architect and supersedes all prior negotiations, representations or agreements, either written or oral. This Agreement may be amended only by written instrument signed by both the Owner and the Architect.

**40. Authorization, Execution, and Audit**

IN WITNESS WHEREOF, the parties, by and through their authorized agents, have hereunder set their hands and seal, all as of the day and year first above written.



AGREEMENT FOR DESIGN PROFESSIONAL SERVICES  
ZEBULON FIRE AND EMS STATION

TOWN OF ZEBULON:

ADW ARCHITECTS PA:

By: \_\_\_\_\_

By: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Title: Town Manager or Designee

Title: \_\_\_\_\_

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

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

Town of Zebulon  
1003 N Arendell Ave  
Zebulon, NC 27597

ADW Architects PA  
2815 Coliseum Centre Drive, Suite 500  
Charlotte, NC 28217

By: \_\_\_\_\_

Name: Chris Perry

Title: Fire Chief, Town of Zebulon

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

\_\_\_\_\_  
Town of Zebulon Finance Officer

The person responsible for monitoring the contract performance requirements is David Rutherford (Wake County, Facilities Design & Construction).



STAFF REPORT  
SUSTAINABILITY BOARD APPOINTMENT  
AUGUST 5, 2024

**Topic:** Sustainability Board Appointment  
**Speaker:** Sheila Long, Parks & Recreation Director  
**From:** Sheila Long, Parks & Recreation Director  
**Approved by:** Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

The Board of Commissioners will consider interim appointments to the Sustainability Board.

**Background:**

The Board of Commissioners funded expanding the sustainability efforts related to joining Bee City USA with adoption of the FY '24 Budget Ordinance. A Sustainability Board, advising the Board of Commissioners regarding environmental sustainability issues such as environmental protection and urban forestry, recycling, and energy use, can support obligations of the Bee City USA and Tree City USA programs.

At the May 15, 2024 work session, the Board of Commissioners provided direction to staff to bring forward Ordinance changes that create the Sustainability Board and possibly assign the duties to the Parks and Recreation Advisory Board. The Board also requested to hear from the Parks and Recreation Advisory Board on serving as the Sustainability Board. The Parks and Recreation Advisory Board met on May 20, 2024. The Advisory Board by unanimous vote provided the below feedback to the Board of Commissioners:

The Parks & Recreation Advisory Board believes that bees and trees are critical to the environment. There is a concern that there might be a lack of knowledge and interest on the Advisory Board in order to see it through to make a lasting impact. While they feel that there may be some connection to the Parks & Recreation Advisory Board, they feel there may be some in the community with more interest and expertise that would be a better fit. If it is assigned to the Parks & Recreation Advisory Board, they want to make sure they have access to the resources and consultants needed to see it through.

At the June 3, 2024 regular meeting, the Board of Commissioners adopted Ordinance 2024-49 to establish the Sustainability Board and Resolution 2024-26 to become a Bee City USA affiliate community. The Board did not make appointments to the Sustainability Board at their June meeting.

The Parks and Recreation Advisory Board met on July 15, 2024 and reviewed the Sustainability Board Appointment and Action Plan Proposal. The Advisory Board unanimously voted to recommend approval of the Sustainability Board Appointment and Action Plan Proposal as presented by staff. Discussion by the Advisory Board indicated the proposal balanced desires of the Board of Commissioners and the Advisory Board while offering a manageable approach to starting a new board.

**Discussion:**

The Board will consider whether to appoint the duties of the Sustainability Board to the Parks & Recreation Advisory Board until members of the Sustainability Board can be appointed.

**Fiscal Analysis:**

The Fiscal Year 2025 proposed budget includes \$5,000 to support Sustainability efforts. Additional funds may be needed to provide necessary resources and consultants to the Parks and Recreation Advisory Board. Depending upon the depth of the Pest Management Plan, additional staff, equipment and supply costs could apply and will need to be considered as the plan is developed.

**Attachments:**

1. Sustainability Board Appointment and Action Plan Proposal

## Sustainability Board Appointment and Action Plan Proposal

### Background

The Board of Commissioners funded expanding the sustainability efforts related to joining Bee City USA with adoption of the FY '24 Budget Ordinance. A Sustainability Board, advising the Board of Commissioners regarding environmental sustainability issues such as environmental protection and urban forestry, recycling, and energy use, and can support obligations of the Bee City USA and Tree City USA programs.

At the May 15, 2024 work session, the Board of Commissioners provided direction to staff to bring forward Ordinance changes that create the Sustainability Board and possibly assign the duties to the Parks and Recreation Advisory Board. The Board also requested to hear from the Parks and Recreation Advisory Board on serving as the Sustainability Board. The Parks and Recreation Advisory Board met on May 20, 2024. The Advisory Board by unanimous vote provided the below feedback to the Board of Commissioners:

The Parks & Recreation Advisory Board believes that bees and trees are critical to the environment. There is a concern that there might be a lack of knowledge and interest on the Advisory Board in order to see it through to make a lasting impact. While they feel that there may be some connection to the Parks & Recreation Advisory Board, they feel there may be some in the community with more interest and expertise that would be a better fit. If it is assigned to the Parks & Recreation Advisory Board, they want to make sure they have access to the resources and consultants needed to see it through.

At the June 3<sup>rd</sup>, 2024 Regular Meeting, staff presented Ordinance 2024-49 to replace the Tree Board with the Sustainability Board to the Board of Commissioners. The Board of Commissioners was told at the time of consideration that it was not written to automatically appoint the Parks and Recreation Advisory Board in order to give them flexibility moving forward. The Board adopted the ordinance as recommended. The Board did not engage in discussion and provide direction regarding appointments. Commissioner Baxter indicated she liked the idea of appointing the Parks and Recreation Advisory Board for now.

The role of the Sustainability Board is to serve as an advisory committee to the Board of Commissioners regarding environmental sustainability issues such as environmental protection and urban forestry, recycling, and energy use. Their duties include:

- Advise, deliberate, and make recommendations on tree and urban forestry related matter, recycling, and energy use.
- Assist in the development and implementation of any ordinances, policies, or plans related to tree and urban forestry, recycling, and energy use.
- Assist with community outreach and public education related to urban forestry and environmental protection related matters.

- Assist in the planning of community events related to urban forestry and environmental protection.
- Provide support and oversight of the Tree City USA and Bee City USA programs.

### Proposed Sustainability Board Timeline

Action	Timeline	Intended Actions
Part Time/Contracted Support	July 2024	Seek either part time or contracted support to oversee the implementation of the Sustainability Board.
Interim Appointment	August – January 2024	Appoint Parks and Recreation Advisory Board at the August Regular Meeting.
Submit Bee City Application	August 2024	Following the appointment of the Sustainability Board we can submit our Bee City Application.
Action Plan	September 2024	Work with the interim board to develop an action plan.
Board Promotion & Application Period	September- November 2024	Staff and the interim board will seek community members interested in applying to the Sustainability Board.
Board Appointment	December 2024	Present applicants to the Board of Commissioners for consideration and appointment.

### Policy Requiring Review by the Sustainability Board

Tree ordinances, the UDO, Water Allocation Plan, and other relevant plans and policies will need to be reviewed by the Sustainability Board.

### Existing Sustainable Related Events

The Town has an existing series of programs and events that would support the functions of the Sustainability Board initiative.

*This space is intentionally blank.*

# ZEBULON

Program/Event	Focus Area	Dept	Date	Description
Fall Recycling Day	Recycling	Public Works	September or October Tentative: September 21 <sup>st</sup> , 2024 (9am to 12 pm)	Collection event for paints, oil, gas, diesel, electronics, batteries, light bulbs, paper shredding, white goods, and tires. Typical participation 85 -130 families. Literature is shared with all groups about stormwater, wake residential convenience centers, how to properly dispose of paint, along with PW swag
Spring Recycling Day	Recycling	Public Works	1 <sup>st</sup> Saturday in April, 9am-12pm	Collection event for paints, oil, gas, diesel, electronics, batteries, light bulbs, paper shredding, white goods, and tires. Typical participation 85 -130 families. Literature is shared with all groups about stormwater, wake residential convenience centers, how to properly dispose of paint, along with PW swag
Used Waste Oil Recycling	Recycling	Public Works	Quarterly Collection by State Contract Vendor	Waste Oil and antifreeze are recycled from PW vehicles.
Residential Recycling	Recycling	Public Works	Year round, bi-weekly collection of residences and town facilities. Special Events	Promotion of recycling is with new resident packet and water bill stuffers. Recycle Carts are placed at Special Events.
Bulk Waste Collection	Recycling	Public Works	Year round	Bulk waste collected from residences is separated. White goods & scrap metal are recycled. Mattresses are shredded by Wake County to extend landfill life. Bulk collection reduces community-wide illegal dumping by providing a convenient, reliable means of disposal for large items.
Lamp & Battery Recycling	Recycling	Public Works	Year round	Collection & recycling of used lamps/light bulbs & batteries from Town facilities & equipment/vehicles.
Semi- Annual Mulch Giveaway	Environmental Protection	Public Works	Spring and Fall – when Mulch is available after grinding.	Yard waste is shredded into free mulch & delivered to in-town residents. Any resident can schedule a pick-up on site. No quantity limitations.

# ZEBULON

NORTH CAROLINA				
Litter Sweeps	Environmental Protection	Public Works	Year round	We provide roadside awareness training, safety vests, trash pickers, work-zone set-up, bags, and disposal. Typically lasts 2-3 hours. Partnership with High School groups, non-profits, or individuals. Typically like to have 10-15 adults.
Stormwater Program	Environmental Protection	Public Works	Goal to begin Spring of 2025.	With the new Stormwater Manager position – our goal is to start a stream sampling program to monitor water quality
Native & Butterfly Garden @ ZCP	Environmental Protection	Parks & Rec	Year Round	In partnership with the Steel Magnolias Garden Club, a native and butterfly fly garden is located along the walkway between the community center and Community Park. The garden is maintained by the club.
Celebrate the Earth: Arbor Day/Earth Day	Environmental Protection	Parks & Rec	A Saturday in April near Earth Day and Arbor Day. Tentative Date: April 19, 2025.	Children and their families are invited to participate in this free Arbor & Earth Day Celebration. Make a commitment to making our planet better by learning about how you can take care of our environment. Earth lovers will use recycled materials for a new purpose and plant tree seedlings to take home.
Pollinator Programs and Gardening Programs	Environmental Protection	Parks & Rec	Spring & Fall	Pollinator education and garden planting: 2 -3 programs per season. Combination of instructor led programs and contracted programs with Sylvan Heights.
Activity Booth Educational Vendors at Special Events:	Environmental Protection	Parks & Rec	Spring & Winter	Community Organizations do educational, informational, and interactive booths at Spring Fest and Candy Cane Lane. Example: Steel Magnolias Garden Club and Clean Water Education Foundation.
Fall Tree Planting	Environmental Protection	Parks & Rec	Annually Fall	Goal of planting 8-10 new or replacement trees in parks throughout Town. Plant any trees purchased through Memorial Tree Program.
Spring Tree Planting	Environmental Protection	Parks & Rec	Annually Spring	Plant 2-3 trees around Arbor Day in select locations throughout the parks

## Bee City Program Action Items

“Every committee will be different but should include individuals with experience and interests that will help the committee complete the commitments. Committees generally include a mix of volunteers and city staff. The committee should have a chair or multiple co-chairs. This committee should be managed either by the affiliate (i.e. City or County) or a non-profit organization and should have a regular meeting schedule that is open to the public. Responsibilities of the committee should include:”

- 1 educational event or pollinator habitat planting/workday
  - Could be fulfilled with existing programming
  - Sustainability Board could opt to expand this effort
- Install a Bee City USA sign
  - Identify prominent location
- Create a webpage
  - Include resolution, link to the Bee City USA website, contact information for the Bee City USA Liaison and Committee, reports, recommended native plant species, & integrated pest management plan
- Create & expand pollinator-friendly habitats
  - Identify & inventory opportunities
  - Develop a native plant list with suppliers
- Develop an integrated Pest Management Plan
- Update the Comprehensive Plan to acknowledge and commit to Bee City USA
- Review all plans, policies and practices related to pollinator conservation.

## Proposed Sustainability Action Plan

The following plan is recommended for consideration by the Sustainability Board in order to become established:

September 2024	Appoint Chair and Co-Chair Draft a proposed work plan and set meeting schedule Upcoming programs Fall tree planting Tree Ordinance
October 2024	Fall Tree Planting Workday
November 2024	Candy Cane Lane Community Engagement Opportunity
January 2025	Appoint New Chair and Co-Chair (New Board) Sustainability Board Training Sustainability Assessment Report Sustainability Board Goals Proposed Work Plan (through June 2025)

March 2025

Bee City: Integrated Pest Management Plan  
Bee City: Identify pollinator-friendly habitats  
Bee City: Native Plant List & Suppliers

April 2025

Pollinator & Tree Planting Workday  
Spring Fest Community Engagement Opportunity

May 2025

Fall Program/Education Plan  
Land Use Comprehensive Plan Review  
Water Allocation Policy Review

### **Staff Liaison**

The Parks and Recreation Department has the Parks and Recreation Advisory Board and is also expected to develop a Youth Advisory Board. The Planning Department manages the Planning Board and the Board of Adjustments. It is recommended that Parks and Recreation help begin the Sustainability Board, but that an employee from another department be identified to serve as the staff liaison due to the current capacity of the Parks and Recreation Department. Alternatively, the Town should seek to hire a part-time employee to manage the Sustainability Board.



**Topic:** Ordinance 2025-07 - PD 2024-02 – 901 Mack Todd Rd  
**Speaker:** Cate Farrell, Planner II  
**From:** Adam Culpepper, Senior Planner  
**Prepared by:** Adam Culpepper, Senior Planner  
**Approved by:** Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

The Board of Commissioners will consider a Conditional Zoning Map Amendment for 901 Mack Todd Rd (PIN# 1795827060) This is a legislative case.

**Background:**

The Town received a Planned Development request from TMTLA Associates (Pam Porter) to develop 13 townhome units on 2.30 acres. The property is owned by Capital Properties of North Carolina LLC and is currently in the Town of Zebulon ETJ and zoned R4-C for the development of a Bungalow Court (Ordinance 2021-75, Attached).

**Discussion:**

The Board shall consider the following questions to determine whether the rezoning is consistent with the intent of the Unified Development Ordinance (Section 2.2.24.J):

1. Does the request advance public health, safety, or welfare?
2. Is the request appropriate for its proposed location, and consistent with the purposes, goals, objectives, and Town's policies?
3. Is the request reasonable and in the public interest?
4. Are there other factors which the Board of Commissioners determines relevant?
5. Is the proposed development better than what would otherwise be permitted under strict interpretation of the UDO 3.5.5?

**Policy Analysis:**

Grow Zebulon: Comprehensive Land Use Plan (Land Use Plan):

The Land Use Plan (adopted June 2021) designated this area "Suburban Residential". This designation allows a mixture of product types, with increased open space to preserve an overall suburban character and encourages moderate density with the inclusion of single family attached lots (Land Use and Development Page 13 & 14, Attached).

Suburban Residential characteristics include a greater focus on the home and less on driveways consuming a large percentage of the front lawn. These characteristics are preserved through alley-loaded townhomes.

Play Zebulon: Parks and Recreation Master Plan (Park Master Plan):

The Park Master Plan identifies a greenway at the rear property boundary. The applicant has proposed the addition of the greenway through the site.

STAFF REPORT  
ORDINANCE 2025-07  
PLANNED DEVELOPMENT 2024-02  
901 MACK TODD RD  
AUGUST 5, 2024

Unified Development Ordinance:

The UDO (Section 2.2.15) allows flexibility from some standards in exchange for a higher quality development more aggressively accomplishing other goals, such as amenities and diverse housing. The applicant proposes a unique rear loaded design townhome project with amenities appropriate for the proposed occupancy.

**Financial Analysis:**

When complete, this development will generate approximately \$26,000 per year in property tax revenue.

**Planning Board Recommendation:**

The Planning Board unanimously recommends approval for PD 2024-02 for 901 Mack Todd Rd finding that the standards of Section 2.2.24.J and Section 3.5.5 have been met and the request is consistent with the Comprehensive Land Use Plan.

**Staff Recommendation:**

Staff recommends approving Ordinance 2025-07 for 901 Mack Todd Rd (PD2024-02) as amended by the applicant, finding that the request is consistent with the Standards of Section 2.2.25.J and 3.5.5 of the UDO, the Grow Zebulon Comprehensive Transportation Plan, Play Zebulon Comprehensive Parks and Recreation Plan, and the Grow Zebulon Comprehensive Land Use Plan.

**Attachments:**


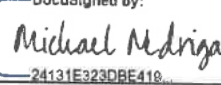
1. Application Material (Application, Neighborhood Meeting Packet, Site Plan, Utility allocation, and Traffic Letter)
2. Planned Development Narrative
3. Future Land Use and Character Map
4. Aerial Map
5. Zoning Map
6. Site Pictures
7. Public Hearing Notification Affidavit
8. Planned Development Standards (UDO Section 3.5.5)
9. Comprehensive Plan Excerpt
10. Ordinance 2025-07



## APPLICATION FOR PLANNED DEVELOPMENT

<b>PART 1. DESCRIPTION OF REQUEST/PROPERTY</b>		
Street Address of the Property: <b>901 Mack Todd Road</b>		Acreage: <b>2.30</b>
Parcel Identification Number (NC PIN): <b>1795-82-7060</b>	Deed Book: <b>17475</b>	Deed Page(s): <b>0821</b>
Existing Zoning of the Property: <b>R4</b>	Proposed Zoning of the Property: <b>PD</b>	
Existing Use of the Property: <b>vacant</b>	Proposed Use of the Property: <b>single family attached</b>	
Reason for rezoning to a Planned Unit Development: <b>Rezoning to increase density from previous rezoning on this parcel.</b>		

<b>PART 2. APPLICANT/AGENT INFORMATION</b>		
Name of Applicant/Agent: <b>TMTLA Associates (Contact: Pam Porter)</b>		
Street Address of Applicant/Agent: <b>5011 Southpark Drive, Ste. 200</b>		
City: <b>Durham</b>	State: <b>NC</b>	Zip Code: <b>27713</b>
Email of Applicant/Agent: <b>pam@tmtla.com</b>	Telephone Number of Applicant/Agent: <b>919-484-8880</b>	Fax Number of Applicant/Agent: <b>n/a</b>
Are you the owner of the property? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Are you the owner's agent? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<b>Note: If you are not the owner of the property, you must obtain the Owner's consent and signature giving you permission to submit this application.</b>

<b>PART 3. PROPERTY OWNER INFORMATION</b>		
Name of Property Owner: <b>Capital Properties of North Carolina LLC</b>		
Street Address of Property Owner: <b>1540 Grand Willow Way</b>		
City: <b>Raleigh</b>	State: <b>NC</b>	Zip Code: <b>27614</b>
Email of Property Owner: <b>cpncllc@gmail.com</b>	Telephone Number of Property Owner: <b>919-779-9664</b>	Fax Number of Property Owner: <b>n/a</b>
<b>I hereby state that the facts related in this application and any documents submitted herewith are complete, true, correct, and accurate to the best of my knowledge.</b>		
<b>Signature of Applicant:</b>	DocuSigned by:  <b>Michael Nedriga</b> 24131E323DBE419...	<b>Print Name:</b> Michael Nedriga <b>Date:</b> 1/24/2024
<b>Signature of Owner:</b>	DocuSigned by:  <b>Michael Nedriga</b> 24131E323DBE419...	<b>Print Name:</b> Michael Nedriga <b>Date:</b> 1/24/2024



## APPLICATION FOR PLANNED DEVELOPMENT

### LEGISLATIVE CONSIDERATIONS – PLANNED DEVELOPMENT

The applicant shall propose site-specific standards and conditions that take into account the following considerations, which are considerations that are relevant to the legislative determination of whether or not the proposed planned development is in the public interest. These considerations do not exclude the legislative consideration of any other factor that is relevant to the public interest. Failure to adequately address the findings below may result in denial of the application. Please provide responses to the following standards as outlined in Section 2.2.15 of the Unified Development Ordinance.

1. Please provide details on how the proposed Planned Development advances the public health, safety, or welfare	Provide new housing to residents of Zebulon in close proximity to local shopping.
2. Please provide details on how the proposed Planned Development is appropriate for its proposed location, and is consistent with the purposes, goals, objectives, and policies of the Town's adopted policy guidance.	Proposed zoning and use will be in accordance with all zoning requirements and Town ordinances.
3. Please provide details on how the proposed Planned Development is reasonable and in the public interest.	This development will provide new housing within close proximity to local shopping, businesses, and professional facilities and services. The development is small and will not disrupt local traffic or adjacent property owners.
4. Please provide details on how the proposed Planned Unit Development provides for innovative land planning and site design concepts that support a high quality of life and achieve a high quality of development, environmental sensitivity, energy efficiency, and other Town goals and objectives.	This development will include high quality housing while protecting the environmentally sensitive land located in on site. This development will provide a much needed portion of the Corridor 8 greenway which will help connect residents to downtown Zebulon.
5. Please provide details on how the proposed planned unit development provides improved means of access, open space, and design amenities;	This development will include a variety of amenities to residents, plentiful open space, and also provide a section of the Corridor 8 greenway. Access to this small development will be via a shared access (no new public roads planned).



# APPLICATION FOR PLANNED DEVELOPMENT

6. Please provide details on how the proposed Planned Unit Development provides a well-integrated mix of residential and nonresidential land uses in the same development, including a mix of housing types, lot sizes, and densities;
This development is not large enough to provide multiple housing types - but it does provide a pocket of single family attached housing which helps to diversify housing type.
7. Please provide details on how the proposed Planned Unit Development creates a system of incentives for redevelopment and infill in order to revitalize established areas;
This small development, only 2.30 acres, could be considered infill development. It will help to introduce a new housing type in a small (i.e. not overwhelming) development in an area where no other single family attached homes are located.
8. Please provide details on how the proposed Planned Unit Development promotes a vibrant public realm by placing increased emphasis on active ground floor uses, pedestrian-oriented building façade design, intensive use of sidewalks, and establishment of public gathering areas;
This development will front units on Mack Todd Road and open space - all units will be rear loaded. This will place units closer to the street and allow for residents to interact with each other on a pedestrian level. Various amenities to promote public gathering will be included.
9. Please provide details on how the proposed Planned Unit Development provides for efficient use of land resulting in smaller networks of utilities and streets and thereby lowering development and housing costs; and
Due to the presence of a stream buffer on this small site, this development is forced to cluster units around those environmentally sensitive areas. This lowers infrastructure cost as it forces the development to be efficient with design.
10. Please provide details on how the proposed Planned Unit Development provides quality design and environmentally sensitive development that respects surrounding established land use character and respects and takes advantage of a site's natural and man-made features, such as trees, estuaries, shorelines, special flood hazard area, and historic features.
The proposed development works around the existing environmentally sensitive areas located on this site. Nestled around the existing stream buffer, this development sees those environmentally sensitive areas as an asset to this development, providing an abundance of green space for residents to enjoy.
11. Other factors as the Board of Commissioners may determine to be relevant.



## APPLICATION FOR PLANNED DEVELOPMENT

PART 1. DESCRIPTION OF REQUEST/PROPERTY		
Street Address of the Property: <b>901 Mack Todd Road</b>		Acreage: <b>2.30</b>
Parcel Identification Number (NC PIN): <b>1795-82-7060</b>	Deed Book: <b>17475</b>	Deed Page(s): <b>0821</b>
Existing Zoning of the Property: <b>R4</b>	Proposed Zoning of the Property: <b>PD</b>	
Existing Use of the Property: <b>vacant</b>	Proposed Use of the Property: <b>single family attached</b>	
Reason for rezoning to a Planned Unit Development: <b>Rezoning to increase density from previous rezoning on this parcel.</b>		

PART 2. APPLICANT/AGENT INFORMATION		
Name of Applicant/Agent: <b>TMTLA Associates (Contact: Pam Porter)</b>		
Street Address of Applicant/Agent: <b>5011 Southpark Drive, Ste. 200</b>		
City: <b>Durham</b>	State: <b>NC</b>	Zip Code: <b>27713</b>
Email of Applicant/Agent: <b>pam@tmtla.com</b>	Telephone Number of Applicant/Agent: <b>919-484-8880</b>	Fax Number of Applicant/Agent: <b>n/a</b>
Are you the owner of the property? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Are you the owner's agent? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<b>Note: If you are not the owner of the property, you must obtain the Owner's consent and signature giving you permission to submit this application.</b>

PART 3. PROPERTY OWNER INFORMATION		
Name of Property Owner: <b>Capital Properties of North Carolina LLC</b>		
Street Address of Property Owner: <b>1540 Grand Willow Way</b>		
City: <b>Raleigh</b>	State: <b>NC</b>	Zip Code: <b>27614</b>
Email of Property Owner: <b>cpncllc@gmail.com</b>	Telephone Number of Property Owner: <b>919-779-9664</b>	Fax Number of Property Owner: <b>n/a</b>
<i>I hereby state that the facts related in this application and any documents submitted herewith are complete, true, correct, and accurate to the best of my knowledge.</i>		
Signature of Applicant:	DocuSigned by:  <b>Michael Nedriga</b> <small>24131E323DBE419...</small>	Print Name: <b>Michael Nedriga</b> Date: <b>1/24/2024</b>
Signature of Owner:	DocuSigned by:  <b>Michael Nedriga</b> <small>24131E323DBE419...</small>	Print Name: <b>Michael Nedriga</b> Date: <b>1/24/2024</b>



## APPLICATION FOR PLANNED DEVELOPMENT

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## APPLICATION FOR PLANNED DEVELOPMENT

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11. Other factors as the Board of Commissioners may determine to be relevant.



# APPLICATION FOR PLANNED DEVELOPMENT

## OWNER'S CONSENT FORM

Name of Project: 901 Mack Todd Road Submittal Date: 2/1/2024

### OWNER'S AUTHORIZATION

I hereby give CONSENT to TMTLA Associates (type, stamp or print clearly full name of agent) to act on my behalf, to submit or have submitted this application and all required material and documents, and to attend and represent me at all meetings and public hearings pertaining to the application(s) indicated above. Furthermore, I hereby give consent to the party designated above to agree to all terms and conditions which may arise as part of the approval of this application.

I hereby certify I have full knowledge the property I have an ownership interest in is the subject of this application. I acknowledge and agree that, pursuant to Section 2.2.15. of the Town of Zebulon Unified Development Ordinance, that lands subject to a Planned Development shall be subject to all the standards, conditions, and plans approved as part of that application. These standards, plans, and approved conditions are perpetually binding on the land as an amendment to this Ordinance and the Official Zoning Map and may only be changed in accordance with the procedures established in this Ordinance. Development located outside the Town of Zebulon's corporate limits shall comply with all Town policies related to annexation and the extension of utilities. I understand that all other applicable standards and regulations of the UDO will remain applicable to the subject lands unless specifically listed as conditions or deviations as part of this request. I understand that any false, inaccurate, or incomplete information provided by me, or my agent will result in the denial, revocation or administrative withdrawal of this application, request, approval or permits. I acknowledge that additional information may be required to process this application. I further consent to the Town of Zebulon to publish, copy or reproduce any copyrighted document submitted as a part of this application for any third party. I further agree to all terms and conditions, which may be imposed as part of the approval of this application.

DocuSigned by:

*Michael Nedriga*

Michael Nedriga

1/24/2024

24131E323DBE419...  
*Signature of Owner*

*Print Name*

*Date*

### CERTIFICATION OF PROPERTY OWNER

I hereby certify the statements or information made in any paper or plans submitted herewith are true and correct to the best of my knowledge. I understand this application, related material and all attachments become official records of the Planning Department of the Town of Zebulon, North Carolina, and will not be returned.

DocuSigned by:

*Michael Nedriga*

Michael Nedriga

1/24/2024

24131E323DBE419...  
*Signature of Owner*

*Print Name*

*Date*

\*Owner of record as shown by the Wake County Revenue Department ([www.wakegov.com](http://www.wakegov.com)). An option to purchase does not constitute ownership. If ownership has been recently transferred, a copy of the deed must accompany this form.



## APPLICATION FOR PLANNED DEVELOPMENT

### CONCEPT PLAN REQUIREMENTS

Every applicant requesting Planned Development approval shall submit **8 copies** and **1 pdf (e-mail or USB Drive)** of a concept plan drawing with the application for a Planned Development. The concept plan shall contain sufficient information to adequately determine the type of development being proposed. The concept plan drawing shall include, at a minimum, the following features unless otherwise specified by the Planning Department:

**CHECK IF  
SUBMITTED**

**ITEM**

1.	Plot plan showing all existing and planned structures, building setback lines, perimeter boundaries, and easements.	√ _____
2.	Elevation drawings of all buildings indicating the proposed exterior finish materials.	√ _____
3.	Landscaping plan, lighting, fencing, screening, and walls, indicating all heights and locations.	√ _____
4.	Location of all ingress and egress.	√ _____
5.	Off-street parking and loading facilities, with calculations showing how the quantities were obtained.	√ _____
6.	All pedestrian walks and open areas for use by residents, tenants, or the public.	√ _____
7.	Proposed land uses indicating areas in square feet.	√ _____
8.	The location and types of all signs, including lighting and heights, with elevation drawings.	n/a _____
9.	Existing and/or proposed street names.	√ _____
10.	Proposed potable or reuse water, wastewater connections, and storm sewer line; proposed grading and drainage patterns; proposed water and sewer allocations.	√ _____
11.	Such additional items and conditions, including design standards as the Planning Board and Board of Commissioners deems necessary.	√ _____
12.	Trip generation data and TIA	n/a _____



**PROPOSED USES**

An application has been duly filed requesting that the property described in this application be rezoned from R4 \_\_\_\_\_ to PD \_\_\_\_\_. It is understood and acknowledged that if the property is rezoned as requested, the property described in this request will be perpetually bound to the use(s) authorized and subject to such conditions as imposed, unless subsequently changed or amended as provided for in the Unified Development Ordinance. It is further understood and acknowledged that final plans for any specific development to be made pursuant to any such Planned Development shall be submitted for site or subdivision plan approval. Use additional pages as needed.

The Rezoned Lands may be used for, and only for, the uses listed immediately below. The permitted uses are subject to the limitations and regulations stated in the Use Table and any additional limitations or regulations stated below. For convenience, some relevant sections of the Unified Development Ordinance may be referenced; such references do not imply that other sections of the Unified Development Ordinance do not apply.

1.	Single Family Attached and permitted accessory uses	25.	
2.		26.	
3.		27.	
4.		28.	
5.		29.	
6.		30.	
7.		31.	
8.		32.	
9.		33.	
10.		34.	
11.		35.	
12.		36.	
13.		37.	
14.		38.	
15.		39.	
16.		40.	
17.		41.	
18.		42.	
19.		43.	
20.		44.	
21.		45.	
22.		46.	
23.		47.	
24.		48.	





901 Mack Todd Road - Parcels within 750'

Parcel Address	REID	Owner
970 MACK TODD RD	0188800	CAVALLERO, DARIO L EHMANN, DONNA CAVALLERO
750 PONY RD	0051771	CROUSE, DONNA M BULLOCK
100 SHANNON DR	0118145	HOUSING AUTH COUNTY OF WAKE
941 MACK TODD RD	0001204	JAM MAR PROPERTIES LLC
608 W BARBEE ST	0054481	BROWN, LARRY G BROWN, MARY J
535 MACK TODD RD	0075388	JNCJ PROPERTIES LLC
600 PONY RD	0036416	CHANDAK, GOVIND CHANDAK, MADHU
721 MACK TODD RD	0089314	HERITAGE BAPTIST CHURCH INC
560 W BARBEE ST	0104806	GAY FAMILY LIMITED PARTNERSHIP II
601 PONY RD	0186160	SILVER SPRING HOUSING ASSOC LLC
600 MACK TODD RD	0085216	LNP INC
950 MACK TODD RD	0115949	HSSW
780 W BARBEE ST	0252242	HERNANDEZ, MARIA A
551 PONY RD	0076634	ZEBULON HEALTH HOLDINGS LLC
0 W BARBEE ST	0337278	SMITH, TODD L
704 W BARBEE ST	0068443	PERRY QUINN PROPERTIES INC
521 DUGGINS OAK DR	0190619	ZEBULON GREEN ASSOCIATES LIMITED PARTNERSHIP
901 MACK TODD RD	0077886	CAPITAL PARTNERS OF NORTH CAROLINA LLC
0 W BARBEE ST	0476110	TODD, JAMES THOMAS JR TRUSTEE HOLDEN, BRENDA TODD HEIRS
808 W BARBEE ST	0070909	TODD, JAMES THOMAS JR TRUSTEE HOLDEN, BRENDA TODD HEIRS
934 W BARBEE ST	0070905	HARRISON, MIRANDA TODD TRUSTEE TODD PROTECTION TRUST
0 W BARBEE ST	0476109	TODD, GLENN A TODD, VERA L
820 W BARBEE ST	0070906	TODD, GLENN A TODD, VERA L
705 PONY RD	0060530	MERITAGE HOMES OF THE CAROLINAS INC
700 PONY RD	0245658	700 PONY LLC
801 MACK TODD RD	0082911	HERITAGE BAPTIST CHURCH INC
804 W BARBEE ST	0070907	PREDDY, MARY ANN TODD

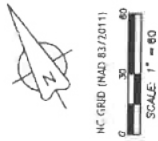


**BOUNDARY & TOPGRAPHIC SURVEY**  
**901 MACK TODD RD.**  
**ZEBULON, NC**  
**LITTLE RIVER TOWNSHIP**  
**WAKE COUNTY, NC**  
**FEBRUARY 11, 2021**



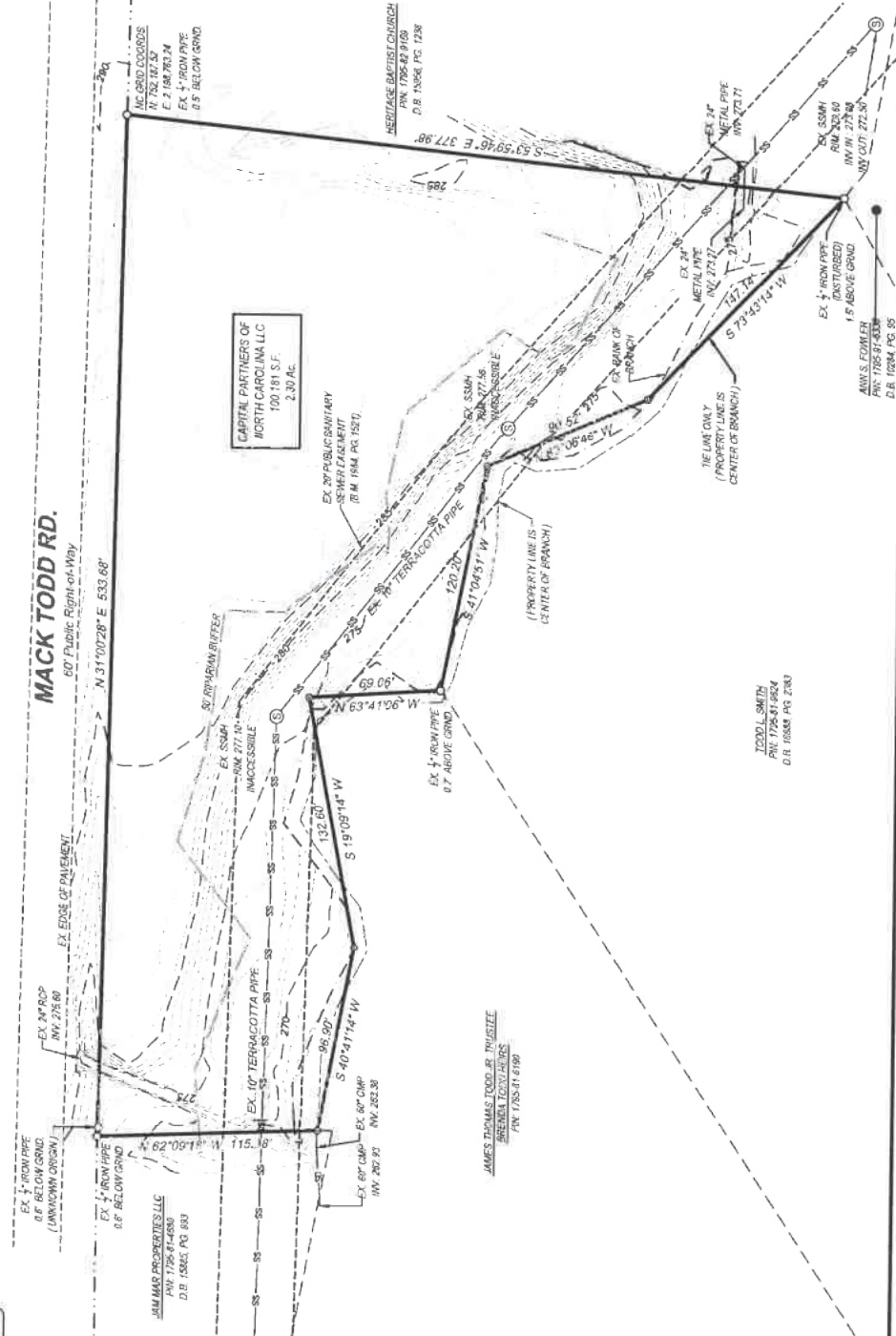
Jeremy Taylor, certify that this plat was drawn under my supervision from an actual survey made under my supervision (deed and description recorded in Book referenced); that the boundaries not surveyed are indicated as drawn from information in Book referenced; that the ratio of precision or accuracy exceeds 1:10,000; and that this map complies with the Standards of Practice for Land Surveying in North Carolina (21 N.C.A.C. 56.1600). This Day of August, 2019.

PRELIMINARY  
 FOR REVIEW  
 PURPOSES ONLY



**NOTES:**

- 1) The basis of all statements, rights-of-way's, property lines, buffers, setbacks and adjoining, etc., referenced from Deed Book 18077, Page 2356, unless otherwise noted, performed by this firm.
- 2) No investigation into the existence of jurisdictional wetlands or riparian buffers.
- 3) Surveyor has made no investigation of independent search for easements of record, encumbrances, restrictive covenants, easements, title evidence or any other facts that an accurate and current title search may disclose.
- 4) Field survey performed January 29 & February 1, 2021.
- 5) Vertical datum = NAVD 88.



- LEGEND:**
- Ex. property corner
  - Set property corner
  - Calculated point
  - Water Meter
  - Sanitary Sewer Cleanout
  - Power Pole
  - Telephone Pedestal
  - Cable Pedestal
  - HVAC
  - Wetland Flag
  - Fire Hydrant
  - Water Valve
  - Fence
  - Water
  - Sanitary sewer pipe
  - Storm drain pipe
  - Overhead utility
  - Book of Maps
  - Page Book
  - Square Feet
  - Acres

Prepared by: Heyward G. Wall, PO Box 2282, Garner, NC 27529  
Mail to: Grantee

STATE OF NORTH CAROLINA

Excise tax: \$ 242.00

COUNTY OF WAKE

Tax I.D. # 0077886

**TRUSTEE'S DEED**

THIS DEED is made on this the 20th day of November, 2023 between **Heyward Wall Law, P.A., Substitute Trustee**, Grantor, and **Capital Properties of North Carolina, LLC**, Grantee, whose address is 1540 Grand Willow Way, Raleigh, NC 27614.

WITNESSETH:

WHEREAS, Michael W. Nedriga is the beneficiary, owner and holder of the following certain real estate Deed of Trust given in trust to secure the indebtedness as described therein:

<u>GRANTORS</u>	<u>DATE RECORDED</u>	<u>BOOK</u>	<u>PAGE</u>
Capital Partners of North Carolina, LLC	September 15, 2020	18072	2359

WHEREAS, in said Deed of Trust, the Trustee was empowered, pursuant to the request of the Beneficiary of said Deed of Trust upon the breach of any of the covenants contained therein, to sell said property with all improvements thereon, rights, privileges and appurtenances thereunto belonging; and

WHEREAS, default having occurred by said Grantors, foreclosure was initiated in file number 23 SP 2752 and the Wake County Clerk of Superior Court having ordered a sale of the premises pursuant to the provisions of said Deed of Trust; and

WHEREAS, the Substitute Trustee, in the execution of the powers and duties conferred and imposed upon it in said Deed of Trust, did on October 19, 2023 offer for sale said property with all improvements thereon, rights, privileges and appurtenances thereunto belonging at

Submitted electronically by "Heyward Wall Law, P.A."  
in compliance with North Carolina statutes governing recordable documents  
and the terms of the submitter agreement with the Wake County Register of Deeds.

public auction at the Courthouse door in Raleigh, North Carolina, to the highest bidder for cash, at which sale the noteholder made the highest and final bid of \$121,000.00; said bid was held open for the statutory period of ten (10) days without upset bid and said noteholder subsequently assigned his rights to the winning bid to Grantee who complied with the terms of said sale; and

NOW, THEREFORE, in consideration of the premises and the sum of \$121,000.00, the receipt of which is hereby acknowledged, said Grantor does hereby bargain, sell, grant, and convey with special warranty unto the Grantee and its assigns the following property situated in Wake County, North Carolina, and being more particularly described as follows:

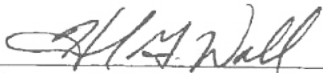
**See attached Exhibit A**

TOGETHER with all the right, title, and interest which the party of the first part acquired in and to the property described above and the rights, privileges, and appurtenances thereunto belonging.

TO HAVE AND TO HOLD the same unto the party of the second part and its assigns forever.

IN WITNESS WHEREOF, the party of the first part has hereunto set its hand and seal, this November 20, 2023.

**Heyward Wall Law, P.A., Substitute Trustee**

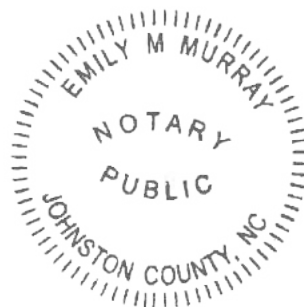
By:  (SEAL)  
Heyward G. Wall, President

North Carolina, Wake County

I, a Notary Public of the County and State aforesaid, certify that Heyward G. Wall, President of Heyward Wall Law, P.A., Substitute Trustee, personally appeared before me this day and acknowledged the execution of the foregoing instrument. Witness my hand and official stamp or seal, this November 20, 2023.

  
Notary Public

My commission exp.: 8/15/2026



## EXHIBIT "A"

Beginning at an iron stake in the intersection of the southern right of way line of U.S. Highway 64 and the line of H.W. Whitley property west of the corporate limits of the Town of Zebulon, runs thence with the line of H.W. Whitley property South 49° 8' East 378.00 feet to an iron stake; runs thence with the run of a branch as the property line in a southwesterly direction (tie line courses and distances: South 78° 35' West 147.14 feet, North 78° 15' West 90.52 feet, South 47° 1' West 113.72 feet, North 64° 30' West 69.00 feet, South 24° 1' West 132.60 feet, and South 45° 33' West 96.90 feet) to a point; runs thence North 56° 47' West 116 feet to an iron stake in the southern right of way line of U.S. Highway 64; runs thence with the southern right of way line of U.S. Highway 64 North 35° 52' East 533.20 feet to the point and place of Beginning, being all of a 2.36 acre tract of land on the southern side of U.S. Highway 64 as shown by survey and map Harold B. Mullen, R.L.S., and dated 3-1-72, and entitled "Property Survey for Russell Blue Williams and Pattie Perry Williams, Little River Township, Wake County, North Carolina."



## NOTICE OF NEIGHBORHOOD MEETING

This document is a public record under the North Carolina Public Records Act and may be published on the Town's website or disclosed to third parties.

Dear Neighbor:

You are invited to a neighborhood meeting to review and discuss the development proposal at:

901 Mack Todd Rd, Zebulon NC 27597

1795-82-7060

(Address)

(Pin Numbers)

in accordance with the Town of Zebulon Neighborhood Meeting procedures. This meeting is intended to be a way for the applicant to discuss the project and review the proposed plans with adjacent neighbors and neighborhood organizations before the submittal of an application to the Town. This provides neighbors an opportunity to raise questions and discuss any concerns about the impacts of the project before it is officially submitted. Once an application has been submitted to the Town, it may be tracked using the Interactive Development Map located on the Town of Zebulon website at <https://www.townofzebulon.org/services/planning>.

A Neighborhood Meeting is requested because this project will include:

- Conditional Rezoning
- Planned Unit Development
- Site Plan within the Downtown Core or Downtown Periphery Zoning Districts
- Zoning Map Amendment (results in more intensive uses or increased density)
- Special Use Permit (Quasi-Judicial Hearing)

\*Quasi-Judicial Hearing: The Board of Commissioners cannot discuss the project prior to the public hearing.

The following is a description of the proposed (also see attached map(s) and/or plan sheet(s)):

We are proposing a Planned Development rezoning to allow for the development of townhomes. The parcel is currently zoned as R4-C zoning designation.

Estimated Submittal Date: February 1, 2024

### MEETING INFORMATION:

Property Owner(s) Name(s) Capital Partners of North Carolina LLC

Applicant(s) TMTLA Associates

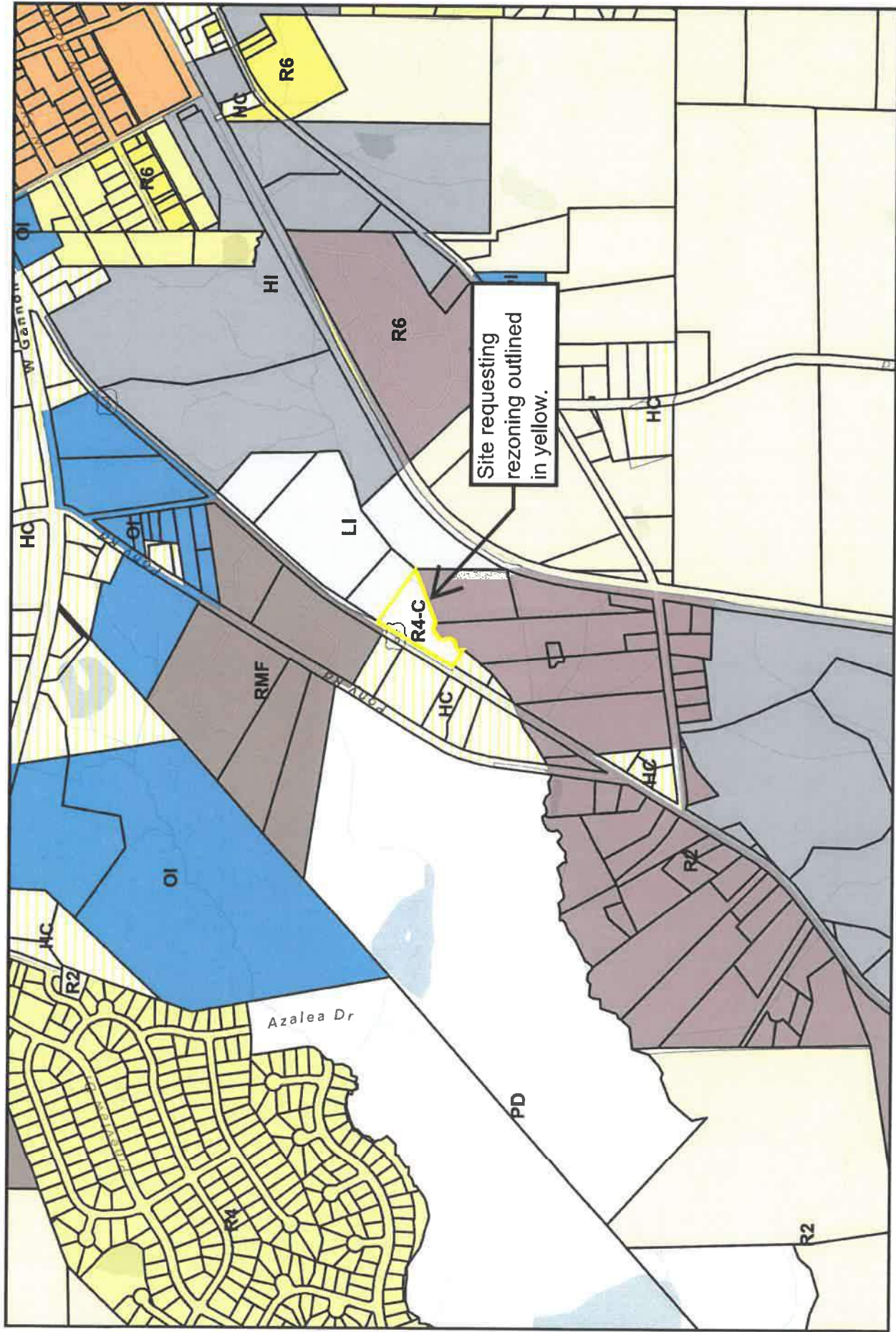
Contact Information (e-mail/phone) pam@tmtla.com/919-484-8880

Meeting Address: 301 S Arendell Ave, Zebulon, NC 27597 (Zebulon Community Center - Classroom A)

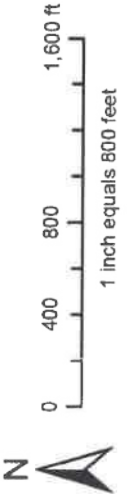
Date of Meeting: December 19, 2023

Time of Meeting: 5:00pm - 7:00pm

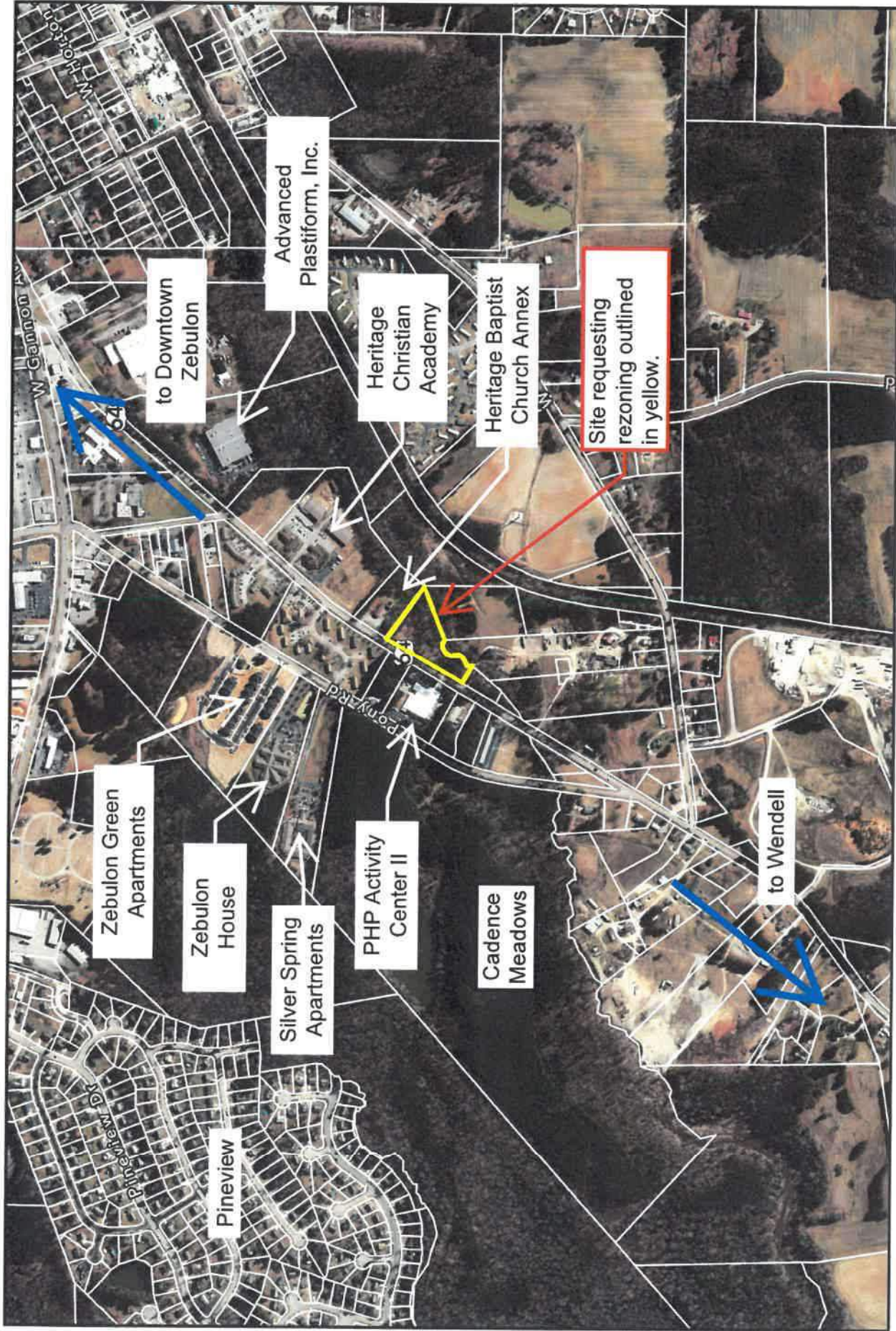
\*\*Meetings shall occur between 5:00 p.m.-9:00 p.m. on a Monday through Thursday (excluding Town recognized holidays). If you have questions about the general process for this application, please contact the Planning Department at 919-823-1809. You may also find information about the Zebulon Planning Department and on-going planning efforts at <https://www.townofzebulon.org/services/planning>



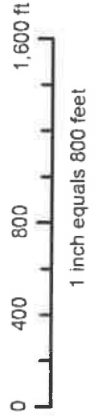
**301 Mack Todd Rd - Existing Zoning**



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



**801 Mack Todd Rd - Vicinity Map**



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Site requesting rezoning outlined in yellow.

to Downtown Zebulon

Advanced Plastiform, Inc.

Heritage Christian Academy

Heritage Baptist Church Annex

Zebulon Green Apartments

Zebulon House

Silver Spring Apartments

PHP Activity Center II

Cadence Meadows

Pineview

to Wendell

W Gannon Ave

W Pineview Way

Ponyard Rd

64

R

R

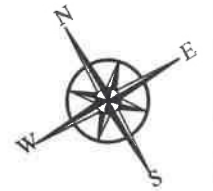
# MACK TODD ROAD



## 901 MACK TODD ROAD CONCEPTUAL PLAN

**PLAN IS CONCEPTUAL  
AND MAY CHANGE**

<b>SITE DATA</b>	<b>OWNER:</b> CAPITAL PARTNERS OF NC, LLC
<b>PROPERTY ADDRESS:</b> 901 MACK TODD ROAD, ZEBULON NC 27597	
<b>PIN:</b> 1795-82-7030	
<b>DEED:</b> DB018072/DP02356	
<b>AREA:</b> 2.30 AC	
<b>EX. USE:</b> VACANT	
<b>PROPOSED USE:</b> RESIDENTIAL	
<b>EX. ZONING:</b> R4-C	
<b>ASSUMED ZONING:</b> PD	
<b>OPEN SPACE:</b> 10% REQUIRED / APPX. 40% SHOWN	
<b>ACTIVE OPEN SPACE:</b> 5% (IF OF REQUIRED O.S.) REQUIRED / 5% MIN. TO BE PROVIDED	
<b>VEHICULAR PARKING:</b> 2 PARKING SPACES ON EACH LOT, 6 GUEST PARKING SPACES AND TWO PARKING SPACES FOR THE MAIL KIOSK	
<b>STREAM BUFFERS:</b> YES	
<b>WETLANDS:</b> NO	
<b>FLOODPLAIN:</b> NO	



CONCEPTUAL PLAN BY:

**TMTLA ASSOCIATES**

LANDSCAPE ARCHITECTURE & LAND PLANNING

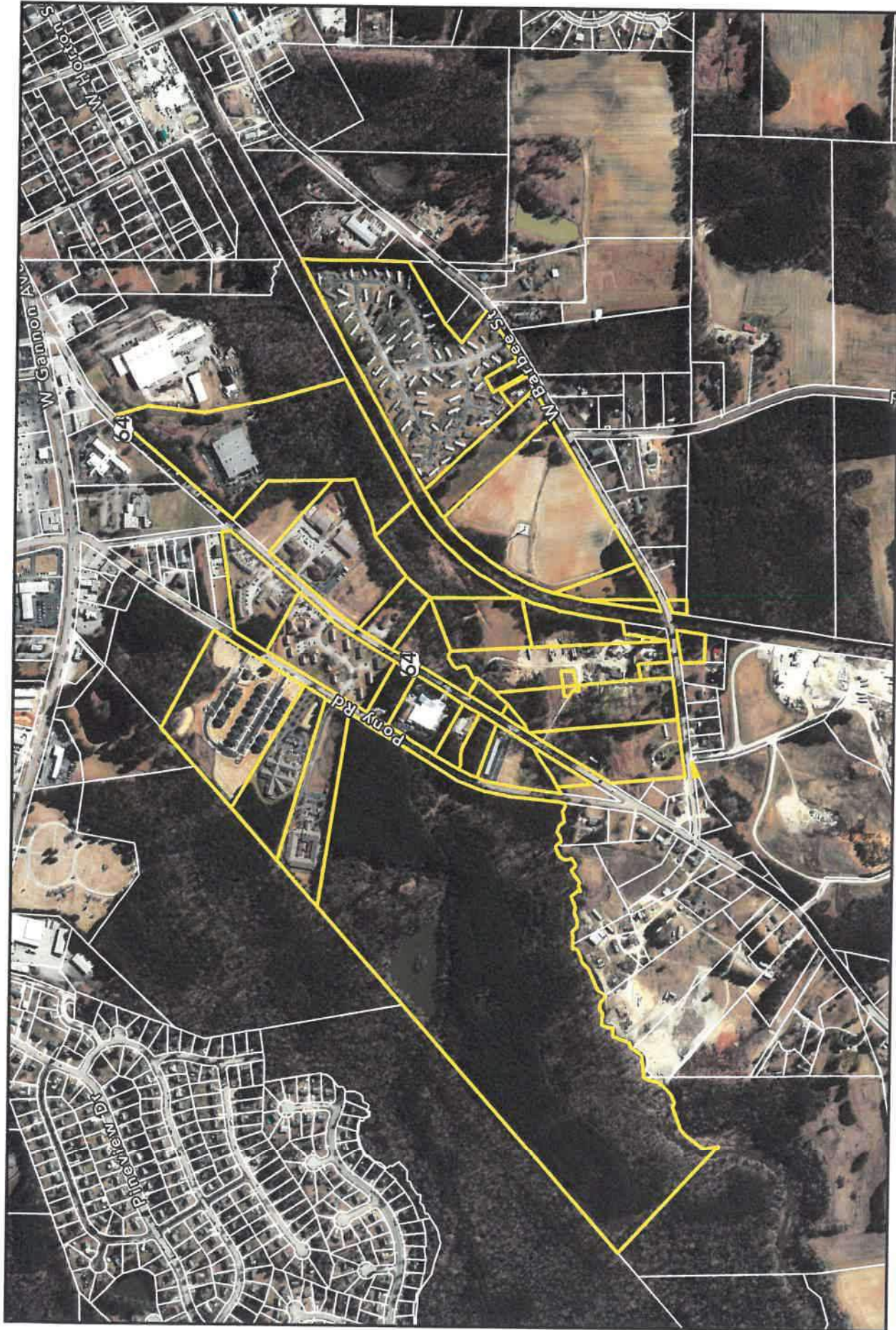
5111 SOUTHPARK DRIVE, STE. 300-DURHAM, NC 27713

F: (919) 494-8886 • [info@tmtla.com](mailto:info@tmtla.com)

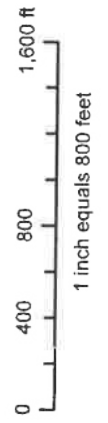


**Neighbors who live/own property within 750' of 901 Mack Todd Road**

CAVALLERO, DARIO L EHMANN, DONNA CAVALLERO	1250 NORTH ST	PITTSFIELD MA 01201-1541
CROUSE, DONNA M BULLOCK	PO BOX 336	ZEBULON NC 27597-0336
HOUSING AUTH COUNTY OF WAKE	100 SHANNON DR	ZEBULON NC 27597-8967
JAM MAR PROPERTIES LLC	PO BOX 509	WENDELL NC 27591-0509
BROWN, LARRY G BROWN, MARY J	608 W BARBEE ST	ZEBULON NC 27597-9215
JNCI PROPERTIES LLC	621 WALTERS DR	WAKE FOREST NC 27587-6180
CHANDAK, GOVIND CHANDAK, MADHU	PO BOX 99104	RALEIGH NC 27624-9104
HERITAGE BAPTIST CHURCH INC	615 MACK TODD RD	ZEBULON NC 27597-9396
GAY FAMILY LIMITED PARTNERSHIP II	PO BOX 10	ZEBULON NC 27597-0010
SILVER SPRING HOUSING ASSOC LLC	7706 SIX FORKS RD	RALEIGH NC 27615-5067
LNP INC (PARRISH REALTY C/O RENEE BAKER)	PO BOX 1128	ZEBULON NC 27597-1128
HSSW	1625 DAVISTOWN RD	WENDELL NC 27591-8984
HERNANDEZ, MARIA A	2037 BALLSTON PL	KNIGHTDALE NC 27545-7439
ZEBULON HEALTH HOLDINGS LLC	PO BOX 2568	HICKORY NC 28603-2568
PERRY QUINN PROPERTIES INC	1260 SUSSEX DR	EMPORIA VA 23847-6438
ZEBULON GREEN ASSOCIATES LIMITED PARTNERSHIP	PO BOX 177	BUNN NC 27508-0177
CAPITAL PARTNERS OF NORTH CAROLINA LLC	2939 BREEZEWOOD AVE STE 201	FAYETTEVILLE NC 28303-5497
TODD, JAMES THOMAS JR TRUSTEE HOLDEN, BRENDA TODD HEIRS	1540 GRAND WILLOW WAY	RALEIGH NC 27614-6002
HARRISON, MIRANDA TODD TRUSTEE TODD PROTECTION TRUST	PO BOX 509	WENDELL NC 27591-0509
TODD, GLENN A TODD, VERA L	179 THORNBURY ST	CLAYTON NC 27527-9315
MERITAGE HOMES OF THE CAROLINAS INC	1013 TRUMPET VINE CT	WENDELL NC 27591-9458
700 PONY LLC	8800 E RAINTREE DR STE 300	SCOTTSDALE AZ 85260-3966
HERITAGE BAPTIST CHURCH INC	PO BOX 890	FRANKLINTON NC 27525-0890
PREDDY, MARY ANN TODD	615 MACK TODD RD	ZEBULON NC 27597-9396
TOWN OF ZEBULON PLANNING DEPARTMENT	12308 STRICKLAND RD	RALEIGH NC 27613-1238
Capital Properties of NC, LLC	1003 N. Arendell Avenue	Zebulon, NC 27597
	1540 Grand Willow Way	Raleigh, NC 27614



**901 Mack Todd Rd - 750' Notification Map**



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



# INFORMATION PACKET FOR NEIGHBORHOOD MEETINGS

## NEIGHBORHOOD MEETING SIGN-IN SHEET:

This document is a public record under the North Carolina Public Records Act and may be published on the Town's website or disclosed to third parties.

Project Name: 901 Mack Todd Road

Meeting Address: 301 S Arendell Ave, Zebulon, NC 27597 (Zebulon Community Center - Classroom A)

Date of Meeting: December 19th, 2023 Time of Meeting: 5pm - 7pm

Property Owner(s) Names: Capital Partners of North Carolina LLC

Applicants: TMTLA Associates (contact: Pam Porter)

Please print your name below, state your address and/or affiliation with a neighborhood group, and provide your phone number and email address. Providing your name below does not represent support or opposition to the project; it is for documentation purposes only.

	Name/ Organization	Address	Phone#	E-mail
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				

Attach Additional Sheets If Necessary.

**Please note no one from the community attended this neighborhood meeting.**



# INFORMATION PACKET FOR NEIGHBORHOOD MEETINGS

## SUMMARY OF DISCUSSION FROM THE NEIGHBORHOOD MEETING

This document is a public record under the North Carolina Public Records Act and may be published on the Town's website or disclosed to third parties.

Project Name: 901 Mack Todd Road

Meeting Address: 301 S Arendell Ave, Zebulon, NC 27597 (Zebulon Community Center - Classroom A)

Date of Meeting: December 19th, 2023 Time of Meeting: 5pm - 7pm

Property Owner(s) Names: Capital Partners of North Carolina LLC

Applicants: TMTLA Associates (contact: Pam Porter)

Please summarize the questions/comments and your response from the Neighborhood Meeting in the spaces below (attach additional sheets, if necessary). Please state if/how the project has been modified in response to any concerns. The response should not be "Noted" or "No Response". There has to be documentation of what consideration the neighbor's concern was given and justification for why no change was deemed warranted.

Question/ Concern #1 n/a

Applicant Response: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Question/ Concern #2 n/a

Applicant Response: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Question/ Concern #3 n/a

Applicant Response: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Question/ Concern #4 n/a

Applicant Response: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Please note no one from the community attended this neighborhood meeting.**



INFORMATION PACKET FOR NEIGHBORHOOD MEETINGS

AFFIDAVIT OF CONDUCTING A NEIGHBORHOOD MEETING, SIGN-IN SHEET AND ISSUES/RESPONSES SUBMITTAL

This document is a public record under the North Carolina Public Records Act and may be published on the Town's website or disclosed to third parties.

I, Pamela Porter, do hereby declare as follows:
Print Name

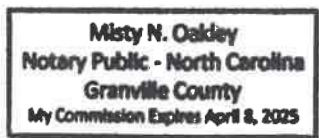
- 1. I have conducted a Neighborhood Meeting for the proposed Rezoning, Major Site Plan, Master Subdivision Plan, or Special Use Permit.
2. The meeting invitations were mailed to the Zebulon Planning Department, all property owners within 750 feet of the subject property and any neighborhood association that represents citizens in the area via first class mail a minimum of 10 days in advance of the Neighborhood Meeting.
3. The meeting was conducted at 301 S Arendell Ave, Zebulon, NC 27597 (location/address) on December 19, 2023 (date) from 5pm (start time) to 7pm (end time).
4. I have included the mailing list, meeting invitation, sign-in sheet, issue/response summary, and zoning map/reduced plans with the application.
5. I have prepared these materials in good faith and to the best of my ability.

1.24.2024 By: [Signature]
Date

STATE OF NC
COUNTY OF Durham

Sworn and subscribed before me, Misty N Oakley, a Notary Public for the above State and County, on this the 24th day of January, 2024.

SEAL [Signature]



Notary Public

[Signature]

Print Name

My Commission Expires: April 8 2025

# 901 Mack Todd Road Planned Development

## PLANNED DEVELOPMENT REZONING CONCEPT PLAN

901 Mack Todd Road  
Zebulon, North Carolina

**OWNER/DEVELOPER:**  
Capital Properties of North Carolina LLC  
1340 Grand Willow Way  
Raleigh, NC 27614  
(919) 779-9664  
Contact: Michael Nedriga

**LAND PLANNING/LANDSCAPE ARCHITECTURE:**  
TMTLA Associates  
5011 Southpark Drive, Suite 200  
Durham, NC 27713  
(919) 484-8880  
Contact: Pam Porter

**SITE DATA**

**AREA:** 2.30 AC  
**PINS:** 1795-82-7040  
**EXISTING USE:** VACANT  
**PROPOSED USE:** TOWNHOMES  
**EXISTING ZONING:** R-4  
**PROPOSED ZONING:** PD  
**CURRENT FUTURE LAND USE DESIGNATION:** IL SR  
**PROPOSED FUTURE LAND USE DESIGNATION:** SR  
**REQUIRED SETBACKS:** SEE SHEET L-2

**PROPOSED IMPERVIOUS:** 40% MAX  
**OPEN SPACE REQUIRED:** 10% MIN.  
**OPEN SPACE PROVIDED:** 40% MIN.

**FLOODPLAIN:** NONE  
**STREAM BUFFERS:** YES  
**WETLANDS:** NONE

**REZONING CONDITIONS:** SEE NARRATIVE



**VICINITY MAP**  
SCALE 1"=500'

**SHEET INDEX**

COVER	L-1
EXISTING CONDITIONS	L-2
CONCEPT PLAN	L-3
PRELIM. UTILITIES AND PONDS	L-4
CONCEPTUAL PHASING PLAN	L-4

**SUBMITTALS**

FIRST SUBMITTAL	2/11/2024
SECOND SUBMITTAL	4/12/2024
THIRD SUBMITTAL	5/6/2024

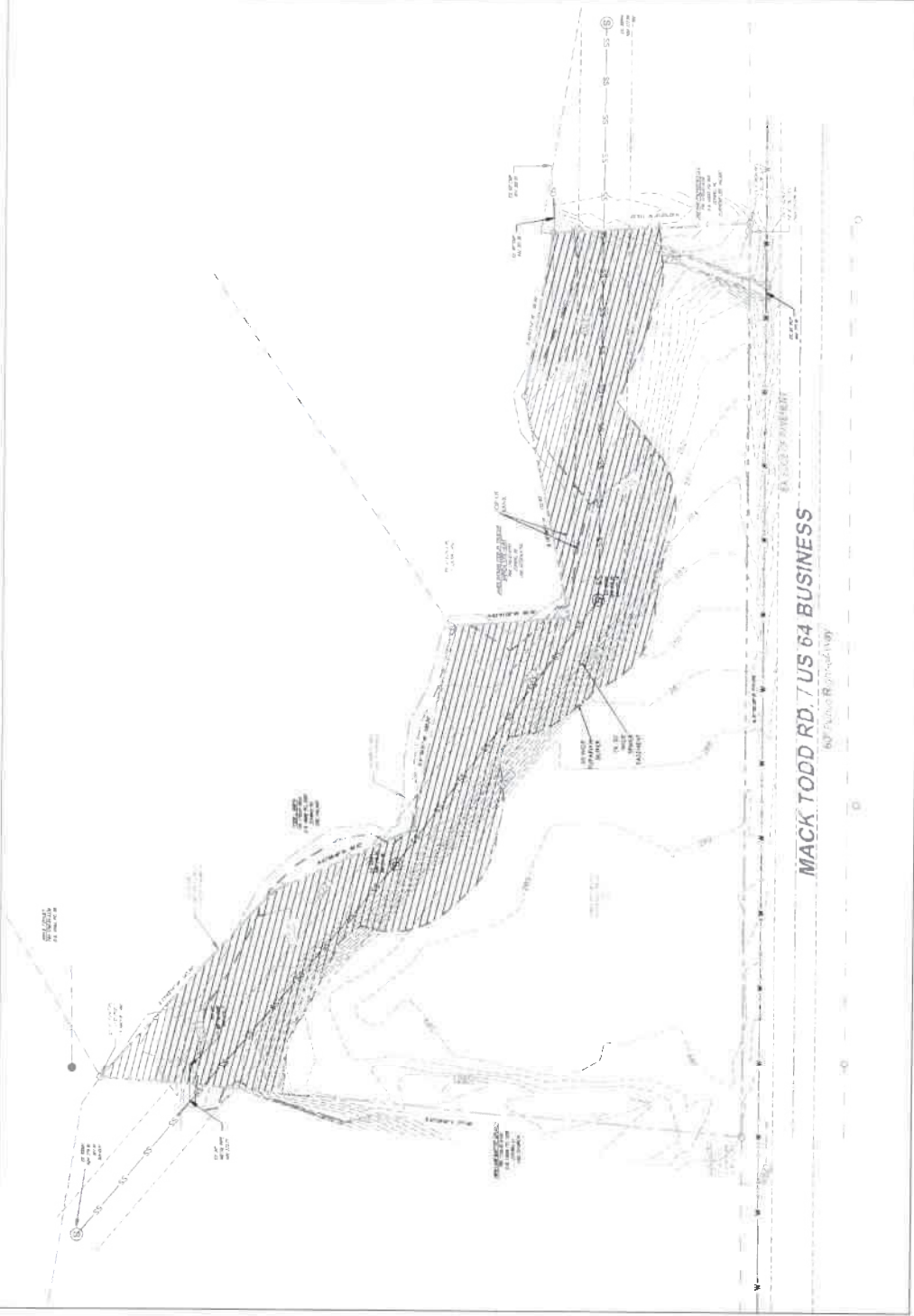
NO.	DATE	DESCRIPTION

**EXISTING CONDITIONS NOTES**

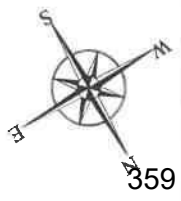
1. BOUNDARY AND FIELD SURVEYING DATA PROVIDED BY LAND SURVEYOR, FEBRUARY 2011.
2. PROJECT IS INVESTIGATED WITHIN CITY OF MACKTODD AS SHOWN ON MAPS & ZONING ORDINANCE DATED MAY 19, 2012.
3. THERE ARE NO PROTECTED WETLANDS WITHIN THE PROJECT SITE.
4. THERE ARE BUTTERED STREAMS WITHIN THE PROJECT SITE.
5. EXISTING CONDITIONS AS SHOWN ON THIS PLAN ARE GENERAL AND NOT TO BE CONSIDERED AS A FINAL DESIGN. THE CONTRACTOR SHALL VERIFY ALL CONDITIONS AND REPORT TO THE CONTRACTOR TO REVIEW THE PROJECT SITE PRIOR TO CONSTRUCTION. ALL CONDITIONS ARE AS SHOWN AND THE CONTRACTOR SHALL VERIFY ALL CONDITIONS PRIOR TO CONSTRUCTION. THE CONTRACTOR SHALL BE RESPONSIBLE FOR OBTAINING ALL NECESSARY PERMITS AND APPROVALS FROM THE LOCAL GOVERNMENT OF MACKTODD.

**SITE DATA**

AREA	2.38 AC
PERMITS	17/12/2010
DATE	VACANT
STREAMS	NO
WETLANDS	NO
FLOODPLAIN	NO



1 EXISTING CONDITIONS PLAN  
SCALE 1"=30'



359

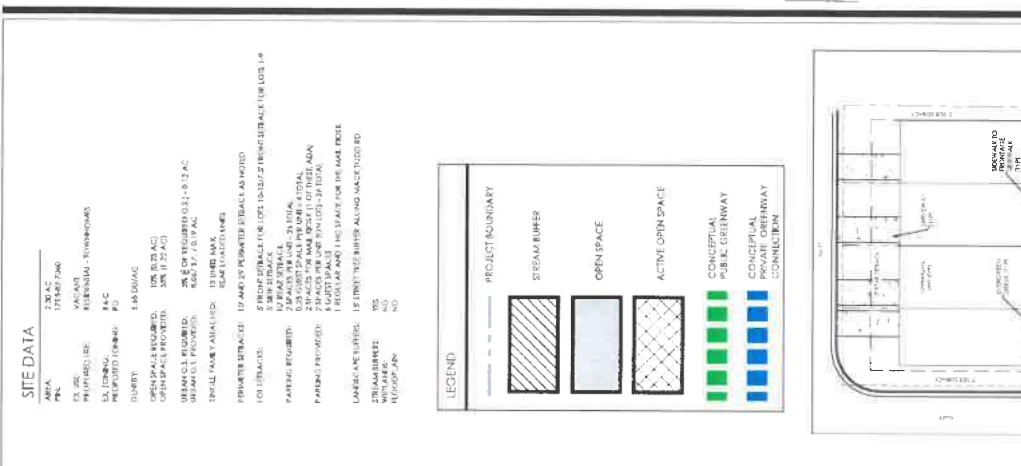


PRELIMINARY  
CONSTRUCTION

REVISIONS:  
4-13-2014  
5-20-2014

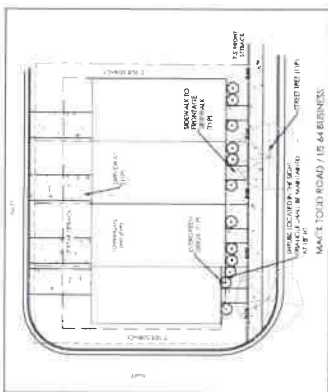
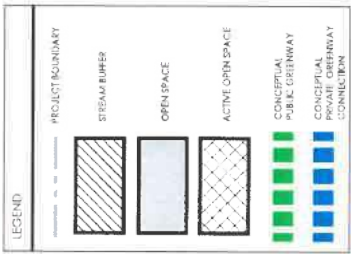
**CONCEPT PLAN NOTES**

- BOUNDARY AND UTILITIES LOCATIONS SHOWN BY SHADING AND DASHED LINES.
- ALL PRELIMINARY AND CONCEPTUAL DESIGN INFORMATION IS SUBJECT TO REVISIONS. THE DESIGNER SHALL BE RESPONSIBLE FOR OBTAINING ALL NECESSARY PERMITS AND APPROVALS FROM THE APPROPRIATE AGENCIES. THE DESIGNER SHALL BE RESPONSIBLE FOR OBTAINING ALL NECESSARY PERMITS AND APPROVALS FROM THE APPROPRIATE AGENCIES. THE DESIGNER SHALL BE RESPONSIBLE FOR OBTAINING ALL NECESSARY PERMITS AND APPROVALS FROM THE APPROPRIATE AGENCIES.
- ALL AREA CALCULATIONS ARE PRELIMINARY AND WILL BE REVISITED DURING THE FINAL DESIGN PHASE OF THE PROJECT.



**SITE DATA**

TOTAL AREA: 17.84 AC  
 TOTAL LOT AREA: 17.84 AC  
 ZONING: RESIDENTIAL - TOWNHOUSES  
 SUBDIVISION: 84-C  
 DEED REFERENCE: P-3  
 DEED REFERENCE: 1.85 (SMAAC)  
 OPEN SPACE REQUIRED: 10% (1.78 AC)  
 OPEN SPACE PROVIDED: 50% (8.92 AC)  
 WEIRAGE REQUIRED: 20% OF REQUIRED (0.31 - 0.35 AC)  
 WEIRAGE PROVIDED: 80% (2.7 AC)  
 SPECIAL FUTURE AMENITIES: 10 TREE MARK, 1000 PLANTINGS  
 FUTURE SETBACKS: 10' AND 30' FRONTER SETBACK AS NOTED  
 FUTURE SETBACKS: 5' FRONT SETBACK FOR LOT 19-21/22 FRONT SETBACK FOR LOT 1-8  
 FUTURE SETBACKS: 10' SIDE SETBACK  
 FUTURE SETBACKS: 10' REAR SETBACK  
 FUTURE SETBACKS: 0.5% COEFFICIENT OF IMPERVIOUSNESS  
 FUTURE SETBACKS: 25' SPACES FOR MAINTENANCE OF THESE ADJACENT SPACES  
 FUTURE SETBACKS: 6' CURB SPACES  
 FUTURE SETBACKS: 1' SIDEWALK AND 1' SPACE FOR THE MAINTENANCE  
 FUTURE SETBACKS: 15' FRONT SETBACK ALONG MACK TODD RD  
 STREAM BUFFER: YES  
 STREAM BUFFER: NO  
 WOODS: YES  
 WOODS: NO



- GENERAL LANDSCAPING NOTES:**
- PLANTING SHALL BE DONE BY THE CONTRACTOR.
  - ALL PLANTING SHALL BE INSTALLED AT 12" DBH UNLESS OTHERWISE NOTED.
  - PLANTING SHALL BE INSTALLED AT 12" DBH UNLESS OTHERWISE NOTED.
  - PLANTING SHALL BE INSTALLED AT 12" DBH UNLESS OTHERWISE NOTED.

**REVISIONS:**

NO.	DATE	DESCRIPTION
1	11/13/2024	ISSUED FOR PERMIT
2	11/13/2024	ISSUED FOR PERMIT

SCALE: AS NOTED  
 DRAWN BY: PMP  
 PROJECT #  
 DATE: 2/1/2024  
 SHEET L-2  
 OF 5

CONCEPT PLAN  
 SCALE: 1" = 50'  
 360



MACK TODD ROAD / US 64 BUSINESS  
 ULTIMATE R/O-W 70

SCALE: 1" = 50'  
 360

LANDSCAPE ARCHITECTURE & LAND PLANNING  
**TMTLA ASSOCIATES**  
 2915 SOUTH PARK DRIVE, STE 200-DUNN, NC 27115  
 P: (919) 484-2018 E: info@tmtla.com



PRELIMINARY  
 NOT FOR  
 CONSTRUCTION

CONCEPT PLAN  
 901 MACK TODD ROAD  
 EBELTON, NC





PRELIMINARY  
 CONSTRUCTION

REVISIONS:  
 4-13-2024  
 5-9-2024

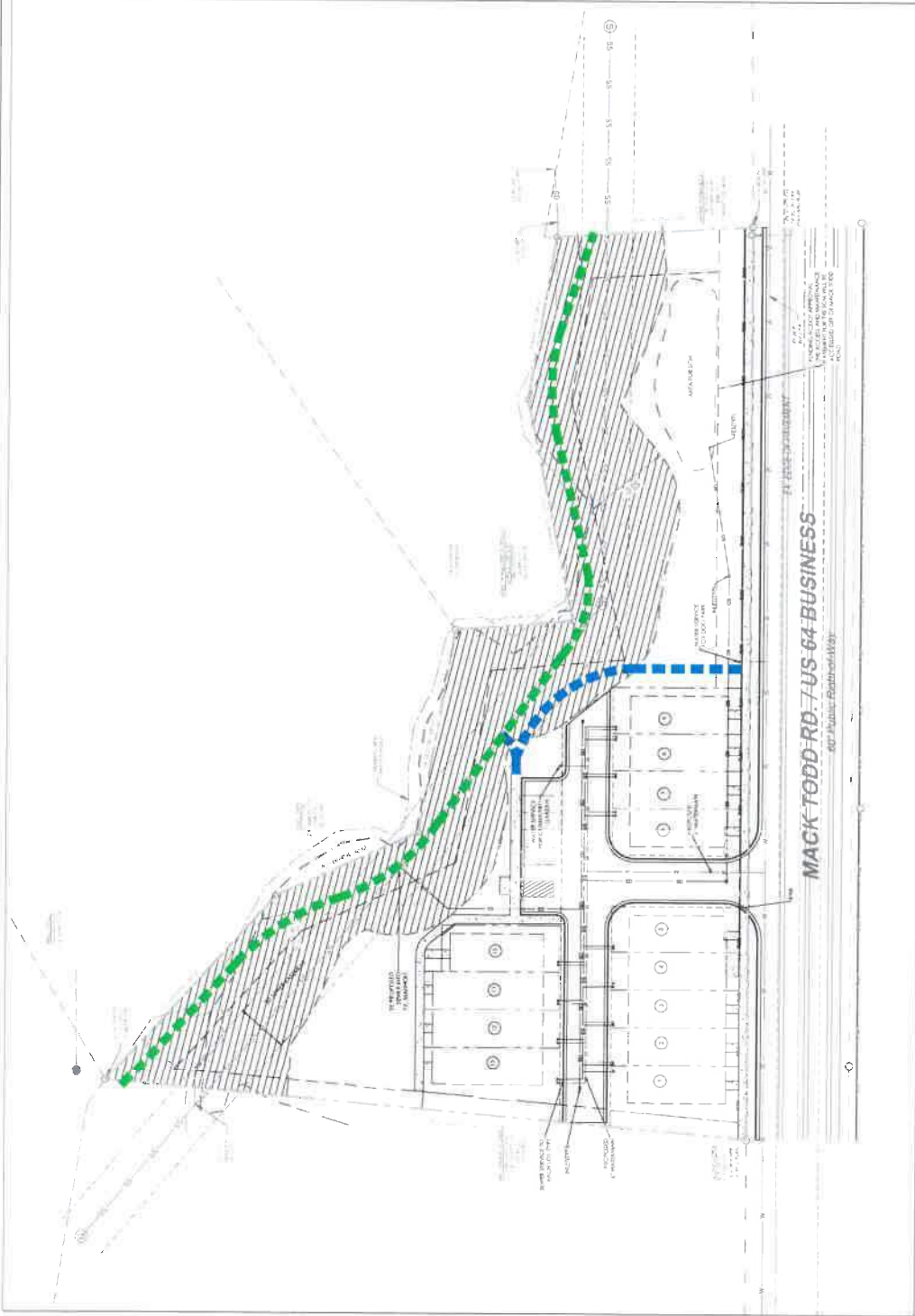
CONCEPTUAL UTILITIES AND SCM  
 901 MACK TODD ROAD  
 75146  
 7/1/2024  
 SHEET  
 L-3  
 OF 5

**CONCEPTUAL UTILITY NOTES**

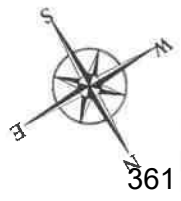
1. CONCEPTUAL UTILITY LOCATIONS SHOWN ON THIS PLAN ARE FOR INFORMATION ONLY. THE EXACT LOCATION OF UTILITIES SHALL BE DETERMINED BY FIELD SURVEY AND SHALL BE SHOWN ON THE CONCEPTUAL UTILITY PLAN BEING AN ADDITIONAL SHEET FOR CONCEPTUAL UTILITY DEVELOPMENT.

**LEGEND**

- PROJECT BOUNDARY
- STREAM BUFFER
- CONCEPTUAL PRESENTAY
- CONCEPTUAL STORM PPF
- CONCEPTUAL SEWER
- CONCEPTUAL WATER



1. CONCEPTUAL UTILITIES AND SCM  
 L3 SCALE: 1"=30'



361



PRELIMINARY  
 NOT FOR  
 CONSTRUCTION

REVISIONS:  
 4/13/2024  
 CORRECT

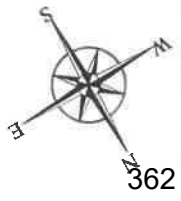
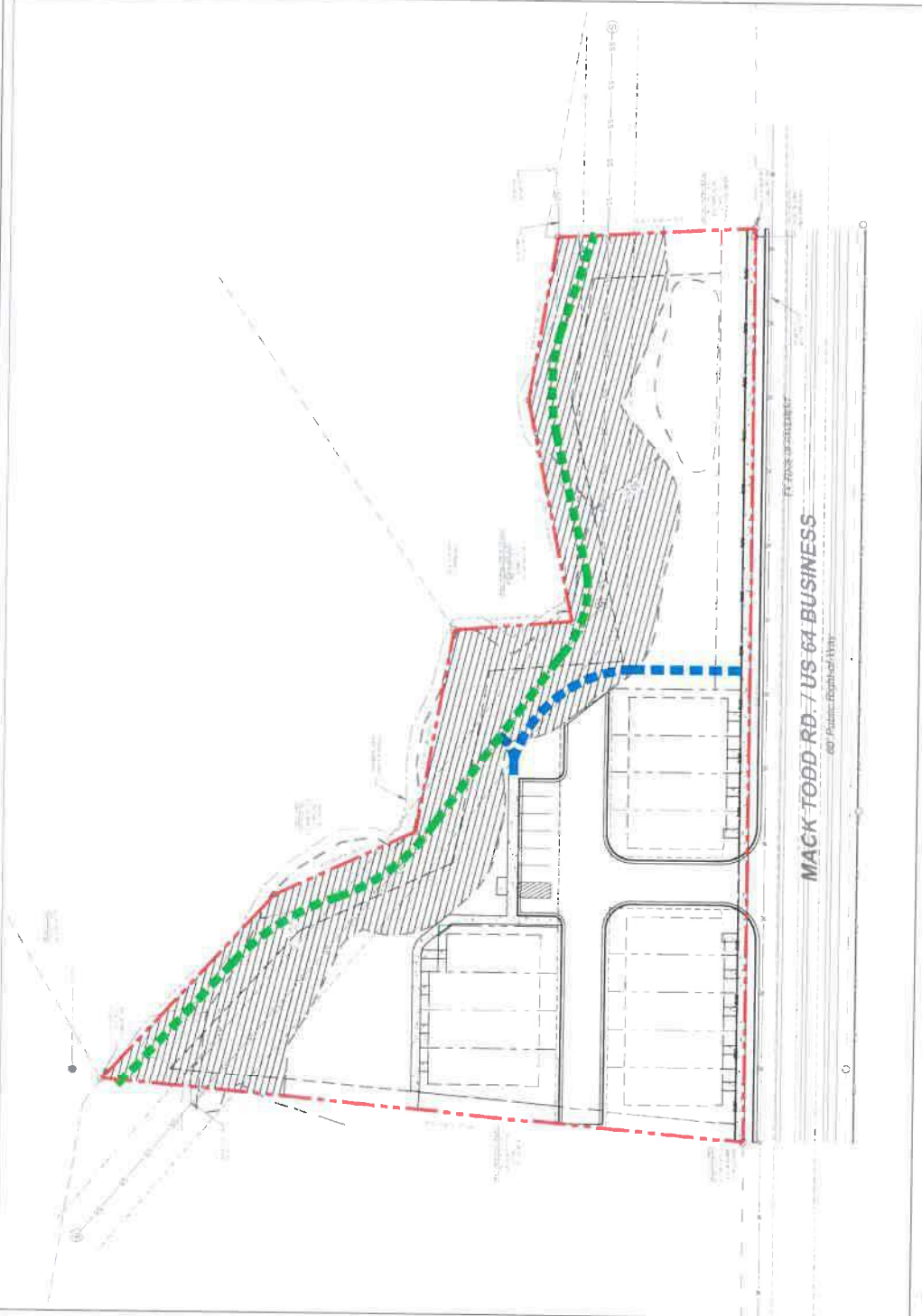
CONCEPTUAL PHASING PLAN  
 901 MACK TODD ROAD  
 DURHAM, NC

SCALE: AS NOTED  
 DRAWN BY: [Redacted]  
 PROJECT # 2316A  
 DATE: 2/17/2024  
 SHEET: L4  
 OF 5

PHASING NOTES  
 THIS SHALL BE CONSTRUCTED BY ONE PHASE

**LEGEND**

- PROJECT BOUNDARY (Red dashed line)
- PHASE LINE (Blue dashed line)
- STREAM BUFFER (Hatched area)
- CONCEPTUAL GREENWAY (Green dashed line)



2 CONCEPT PLAN  
 (L4) SCALE: 1"=30'



## MUNICIPAL UTILITY ALLOCATION POLICY

### Statement of Purpose and Goals

#### *Introduction*

Drinking water supplies throughout the greater City of Raleigh distribution system are finite, subject to disruption by drought and/or other calamity and Zebulon’s allocation is contractually limited. The Town staff, the Planning Board, and the Board of Commissioners have given a great deal of thought and study as to the best utilization of this valuable resource to benefit current and future citizens.

The Town of Zebulon’s municipal water and sewer capacity is a valuable resource that must be conserved and apportioned to new development projects that promote the Town’s policy of ensuring a diversified tax base and housing supply. Such an allocation policy will tend to promote diversity of housing available to a wide cross section of citizens of diverse socio-economic backgrounds and promote economic viability and sustainability by providing for retail and other commercial development within the Town of Zebulon.

In order to preserve and enhance property values, manage its limited water supply as a vital natural resource, promote economic development, and incentivize smart growth practices, the allocation of Zebulon’s potable water capacity shall hereafter be in accordance with this policy.

#### *Land Use and the Tax Base*

The local government expense of providing fire and police protection, schools, parks, social services, water and sewage systems and other essential public services to residential neighborhoods is generally greater than the ad valorem tax revenue generated by such neighborhoods. On the other hand, the cost of providing services to commercial and industrial development is generally less than the tax revenue accruing to the local government. Having a predominantly residential tax base would require the Town of Zebulon over time to assess a higher tax levy to raise funds to provide essential services or to reduce the level of public services provided. This is one reason among many why local governments including Zebulon strive to achieve a balance of both residential and non-residential growth.

Zebulon’s historical development is transitioning from industrial to residential, leading to a current tax base of approximately 40% residential and 60% commercial/industrial. The following table shows Zebulon’s tax base over the past five years <sup>1</sup>

**Zebulon Tax Base (Past Five Years)**

Fiscal Year	Commercial	Residential
2021-2022	60%	40%
2020-2021	65%	35%
2019-2020	72%	28%
2018-2019	73%	27%
2017-2018	71%	29%

<sup>1</sup> “Tax Base Components | Wake County Government,” *Wake County North Carolina*, <https://www.wakegov.com/departments-government/tax-administration/data-files-statistics-and-reports/tax-base-components>

As shown in the table above, the residential tax base has steadily increased proportionally over the past five years. This trend in the tax base data, combined with the vested planned residential development in the coming years, demonstrates the need for the Town to address this shift through policy. The Zebulon Board of Commissioners believes that it is fiscally responsible and otherwise in the public interest to promote and encourage non-residential development in the jurisdiction as an alternative to rapid residential development to keep the ratio between the two development types well balanced. A goal of maintaining a tax base of 60% residential and 40% commercial/industrial is hereby established.

***Development Goals for the Full Build-Out of Zebulon***

Communities without a wide variety of housing types and styles also put pressure on the Wake County Public School System which remains committed to having students of a wide range of socio-economic backgrounds attend each local school. In addition to the goal of maintaining a balanced tax base, the Town of Zebulon is committed to achieving a balance of housing types within its jurisdiction.

This commitment is consistent with both the Town’s Strategic Plan and Comprehensive Plan. The *Town of Zebulon: Vision 2030 Strategic Plan* lists “Growing Smart” as one of its three focus areas, calling for the planning of appropriate land uses and affordability of the community. The *Grow Zebulon Comprehensive Land Use Plan* identifies six guiding principles for the town. Two of those principles are “Zebulon will be BALANCED” and “Zebulon will be PRUDENT.” A balance should be achieved for the Town’s tax base, its land uses, and its housing types to allow for an affordable community with employment and business opportunities that will help the community prosper. The achievement of balance in Zebulon will contribute to the Town being prudent. As stated previously, a local government’s cost of providing services to commercial properties is generally less than that of residential properties. Having a balanced tax base that is not proportionally over-saturated with residential properties will contribute to keeping the Town financially sound.

Below are three development goals that are integral to the utility allocation policy and the future of the Town. These development goals apply to the entire, future Zebulon jurisdiction including the ETJ, short-range and long-range urban service areas.

**GOAL #1:** Maintain 60%-40% ratio of residential to non-residential tax values.

<u>Upon Adoption-January 2021</u> 60% Residential - 40% Non-Residential
--

**GOAL #2:** Residential Housing Percentage Breakdown  
SFD|TH|MF – 75%|10%|15% (Note – Duplex counted as MF)

<u>Upon Adoption-January 2021</u> 80.5%   0.5%   19%
---

**GOAL #3:** Encourage Mixed Use Development to improve pedestrian connectivity to non-residential activity.

## Policy and Procedures

### ***Water Allocation***

All existing parcels of real property within the corporate limits of Zebulon, regardless of proposed acreage, shape, or location as of the adoption of this ordinance are entitled to **115 gallons per day** of water allocation to build and sustain a single family or a limited business or commercial use. No additional water allocation will be awarded for proposed development except in accordance with the requirements of this policy.

### ***Wastewater Connection***

All projects considered for utility allocation must provide a wastewater system connection with adequate receiving capacity, as determined by the Wake County Health Department and/or City of Raleigh Public Utilities Department and approved by the Town of Zebulon Planning Director.

### ***General Conditions & Requirements***

- All proposed projects must be within the existing corporate limits or have filed a valid and complete petition for Voluntary Annexation.
- All proposed projects under consideration must have a complete application submitted for the appropriate Master Plan, Subdivision, Site Plan, Special Use Permit, Conditional Zoning Request, Zoning Compliance Permit, Building Permit, or any other necessary approval.
- All projects are subject to a Utility Allocation or Developer's Agreement approved by the Town's Board of Commissioners. If the Developer/Applicant fails to meet all terms of that agreement the unused allocation will be reclaimed, no new building permits will be issued, and no new connections to the water or wastewater systems will be permitted. Active building permits will have certificates of occupancy held until mitigating measures are agreed to by all parties.
- Projects with proven vested rights upon adoption of this ordinance will be permitted to finish their projects as previously approved.
- Public water may be utilized for irrigation purposes so long as the Primary Use associated with the site has previously gained water allocation through the Town.
- Any third parties who buy land to build upon are bound by the approved Utility Allocation Agreement or Development Agreement for that property. If the agreement is not fulfilled, the above terms and conditions still apply regardless of who owns the land.

### ***Compliance Required***

This policy allocates municipal water in gallons per day for new development proposals, master plans, site plans, building plans, and/or structures seeking construction approval. Each phase of a phased development must comply with the terms and development schedule of an approved Utility Allocation Agreement before the next phase can begin or the development risks loss of previously reserved allocation.

Previously dedicated but unused allocation can be reclaimed by the Town's Board of Commissioners for:

- (1) the lack of compliance with any existing Utility Allocation or Developer's Agreement;
- (2) violation of applicable town policy provision, ordinance standard, condition of approval;
- (3) violation of federal or state regulation; or
- (4) other good cause.

### *Utility Allocation Application Process*

Upon receiving a new development proposal requesting water capacity, the Planning Staff shall direct the Developer/Applicant to demonstrate the project's qualifications. A Developer/Applicant shall state on the appropriate application, and stipulate within an approved Utility Allocation Agreement, the use or uses proposed to be built as part of the project along with the construction design and materials. Town action on the request will be deferred until the application is complete and the requested information has been provided.

Proposed projects shall complete the UTILITY ALLOCATION WORKSHEET according to its instructions to determine the total number of points achieved. The Utility Allocation Application package will be reviewed for completeness and compliance by the Technical Review Committee (TRC) in conjunction with the applicable development approval for the subject property (conditional rezoning, planned development, site plan, etc.).

Qualification for water allocation is judged by:

- The level of developer investment
- Anticipated increases in the Town's ad valorem tax base
- Construction and dedication of public infrastructure
- Provision of employment opportunities for Zebulon citizens
- Provisions of diversified housing stock
- Preservation of open space
- Protection of existing tree canopy
- Conservation of existing habitat
- The provision of recreational amenities for current or future Zebulon residents

Projects must be awarded **60 TOTAL POINTS** or more to merit water allocation.

Points are awarded in two categories, BASE POINTS and BONUS POINTS. BONUS POINTS are broken down into six categories.

1. Nonconformity Abatement and Public Infrastructure Improvements
2. Green Development Standards
3. Gateway and Transit Improvements
4. Amenities
5. Affordable Housing
6. Other

Unless a project can gain all necessary BONUS POINTS from a single improvement identified in the approved list, improvements must be made from at least two of the categories of BONUS POINTS.

All features and/or improvements that earn a projects BONUS POINTS must be clearly shown on a development plan for each application type.

### ***Expiration of Allocation Award***

A developer/applicant who has secured allocation according to this policy and hasn't progressed in construction plan approval, building permit approval, or on-site construction for a period of 12 months will lose the award of allocation without benefit.

### ***Annual Review of Policy & Appeals***

This policy shall be reviewed in January of each year and, when appropriate, readjusted by the Town's Board of Commissioners. The Town's overall progress on policy goals will be considered and the multipliers and/or point thresholds readjusted accordingly.

Appeals of any provision of this ordinance shall be decided upon by the Town's Board of Commissioners upon receiving a recommendation from the Planning Board.

### **BASE POINTS: List of Preferred Land Uses and Required Characteristics:**

The uses listed below have been determined to be the most desirable and important uses for the Town of Zebulon to promote and maintain economic and housing diversity. Only projects that completely meet the stated performance characteristics will be considered for utility allocation. Please select one of the following Base Point classifications.

60 Base Points	<b>Single Family Homes (Expedited Subdivision or Recombination)</b> Newly constructed Single Family Homes built upon new lots created via the minor subdivision, exempt subdivision, expedited subdivision (3 or fewer lots) or recombination process.
60 Base Points	<b>Change of Use</b> This category captures renovation, rehabilitation, up-fit or retrofit of existing buildings or portions of buildings that pre-date this policy and require a code summary sheet, change in building occupancy, certificate of occupancy, building permit and/or building inspections and do not increase the utility demand from the previous use of the building.
45 Base Points	<b>Business Office/Finance/ Insurance / Professional Services Center - Large</b> Qualifying projects must exceed 100,000 square feet of heated floor space and create at least 150 employment positions that exceed the average annual Wake County salary according to Wake County Economic Development or the Employment Security Commission. Employees perform professional, scientific, and technical services for others. Such services require a high degree of expertise and training and provide high salaried employment opportunities. Examples include software engineering, legal, medical, accounting, consulting, architectural, biomedical, chemical, research and development, and administrative services. Finance or Insurance Centers shall also pool financial risks by underwriting insurance and annuities. Some establishments support employee benefit programs. Examples include bank or credit union headquarters, brokerages, investments, insurance, financing, and data processing establishments.
45 Base Points	<b>Manufacturing/Industrial Employment Center</b> Manufacturing or Industrial establishments in this category exceed 200,000 square feet of floor space located in plants, factories, or mills and employ power-

	<p>driven machines and materials-handling equipment. They may also employ workers who assemble or create new products by hand, without the characteristic machinery-intensive enterprise. Many manufacturing establishments process products of agriculture, forestry, fishing, mining, or quarrying as well as products of other manufacturing establishments. Most manufacturing establishments have some form of captive services (e.g., research and development, and administrative operations, such as accounting, payroll, or management) in conjunction on-site.</p>
45 Base Points	<p><b>Governmental Uses/Public Administration</b>  This category encompasses centers for all government functions; it includes federal, state, and local government agencies that administer, oversee, and manage public programs and budgets and have executive, legislative, or judicial authority. Establishments develop policy, create laws, adjudicate civil and criminal legal cases, and provide for public safety and national defense.</p>
40 Base Points	<p><b>Single Use Retail</b>  Newly constructed single use, stand-alone building used primarily for retail, restaurant, or similar commercial use.</p>
40 Base Points	<p><b>Hotels, Motels, or other Accommodation Service Establishments</b>  This category serves lodging and short-term accommodations for travelers. They may offer a wide range of services, from overnight sleeping space to full-service hotel suites. They may offer these services in conjunction with other activities, such as entertainment or recreation. Stays in these establishments are generally less than one month. This classification does not include boarding or rooming houses.</p>
40 Base Points	<p><b>Arts/Entertainment/Museums</b>  These establishments operate facilities or provide services for a variety of cultural, entertainment, and performing art functions. Establishments include those that produce, promote, or participate in live performances, events, or exhibits intended for public viewing; those that preserve and exhibit objects and sites of historical, cultural, or educational interest; and those that operate facilities or provide services to serve activities associated with the aforementioned.</p>
40 Base Points	<p><b>Amusement, Sports or Recreational Establishment</b>  Establishments in this category operate either indoor or outdoor facilities offering family activities (i.e. sports, recreation, or amusement) and provide services, such as facilitating amusement in places operated by others, operating recreational sports groups and leagues. Examples include golf courses, indoor sports venues, bowling alleys, miniature golf courses, athletic clubs, skating rinks and arcades. This category may be used in conjunction with a commercial or residential development as a mixed use development.</p>
40 Base Points	<p><b>Mixed Use Development (Transit Oriented)</b>  Newly constructed or substantially rehabilitated collection of vertically mixed retail, office and residential uses in multi-story buildings centered within a one-half mile radius of an existing rail or bus transit station or the intersection of</p>



	Horton Street and North Arendell Avenue in Downtown Zebulon. In order to qualify as mixed use, developments must dedicate at least one-third of the total heated square footage to residential use and the remainder to a mix of retail and office uses. All three use types must be represented and at least 10% of the heated square footage must be dedicated to street level, storefront retail uses.
40 Base Points	<b>Mixed Use Development (Urban Infill)</b> Newly constructed or substantially rehabilitated collection of mixed retail, office and residential uses in a multi-story building on a previously developed parcel within the corporate limits. In order to qualify as mixed use, developments must dedicate at least one-third of the total heated square footage to residential use and the remainder to a mix of retail and office uses. All three use types must be represented and at least 10% of the heated square footage must be dedicated to street level, storefront retail uses.
40 Base Points	<b>Mixed Use Development (Greenfield)</b> Newly constructed collection of mixed retail, office and residential uses in a multi-story building or buildings on a previously undeveloped parcel. In order to qualify as mixed use, developments must dedicate at least one-third of the total heated square footage to residential use and the remainder to a mix of retail and office uses. All three use types must be represented and at least 10% of the heated square footage must be dedicated to street level, storefront retail uses.
35 Base Points	<b>Housing Services for the Elderly Establishments</b> This category offers housing services for the aged, not requiring a license from the North Carolina Department of Health and Human Services, such as independent retirement housing, multi-unit assisted housing with services (MAHS), and continuing care retirement centers. All facilities must provide, but not necessarily be limited to, the following services/facilities: On-site laundry facilities, on site management, guaranteed transportation services at least four days per week, on-site exercise facilities, on-site computer access, and a clubhouse/common lounge area for all residents.
35 Base Points	<b>Mixture of Use Development (Retail/Office-Institutional/Commercial)</b> Newly constructed collection of horizontally arranged uses including retail, office-institutional and commercial within a master planned project on a previously undeveloped parcel or parcels totaling at least 10 acres. Mixture of use projects must include at least two (2) use types with at least 25% of the space devoted to each use type included in the development.
30 Base Points	<b>Retail/Commercial Center</b> Newly constructed center of at least 50,000 square feet, typically containing an anchor such as a grocery store and other smaller spaces and/or outparcels for subordinate uses. Uses are entirely consumer-driven and include all manner of retail, service and office possibilities.
30 Base Points	<b>Business Office/Finance/ Insurance / Professional Services Center – Medium</b> Qualifying projects must exceed 50,000 square feet of heated floor space and create at least 75 employment positions that exceed the average annual Wake County salary according to Wake County Economic Development or the

	Employment Security Commission. Employees perform professional, scientific, and technical services for others. Such services require a high degree of expertise and training and provide high salaried employment opportunities. Examples include software engineering, legal, medical, accounting, consulting, architectural, biomedical, chemical, research and development, and administrative services. Finance or Insurance Centers shall also pool financial risks by underwriting insurance and annuities. Some establishments support employee benefit programs. Examples include bank or credit union headquarters, brokerages, investments, insurance, financing, and data processing establishments.
30 Base Points	<b>Business Office/Finance/ Insurance / Professional Services Center – Small</b> Qualifying projects 50,000 square feet of heated floor space or less. Employees perform professional, scientific, and technical services for others. Such services require a high degree of expertise and training and provide high salaried employment opportunities. Examples include software engineering, legal, medical, accounting, consulting, architectural, biomedical, chemical, research and development, and administrative services. Finance or Insurance Centers shall also pool financial risks by underwriting insurance and annuities. Some establishments support employee benefit programs. Examples include bank or credit union headquarters, brokerages, investments, insurance, financing, and data processing establishments.
30 Base Points	<b>Multi-Tenant Retail Center</b> Newly constructed center 50,000 square feet or less, typically containing a more than one tenant space within a single structure. Uses are entirely consumer-driven and include all manner of retail, service and office possibilities.
30 Base Points	<b>Single Use Office</b> Newly constructed single use, stand-alone building used primarily for office and professional.
30 Base Points	<b>Bungalow Court or Pocket Neighborhood</b> Newly constructed Bungalow Court or Pocket Neighborhood per the standards of the Unified Development Ordinance.
30 Base Points	<b>Distribution/Trucking Center</b> Newly constructed center of at least 500,000 square feet where products and resources are transported to and delivered from via truck or rail.
25 Base Points	<b>Warehouse</b> Newly constructed center of at least 500,000 square feet where products and resources are stored.
25 Base Points	<b>Religious Institutions</b> Any facility such as a church, temple, synagogue, mosque or monastery used for worship by a non-profit organization and their customarily related uses.
20 Base Points	<b>Intensive Industrial Uses:</b> Uses classified as Special Land Uses within the Industrial Classification.

20 Base Points	<b>Multi-Family Residential &amp; Condo Units</b>
20 Base Points	<b>Major Subdivision 4- 25 Lots</b> Any subdivision of land of four (4) – 25 Lots.
10 Base Points	<b>Major Subdivision 26 lots or more</b> Any subdivision of land of 26 or more lots.
Board Determination	<b>All Other Uses Not Categorized</b> This category of use captures all other uses not categorized elsewhere. <b>Allocations for such uses are left to the discretion of the Town’s Board of Commissioners upon recommendation of the Planning Board and acted on a case-by-case basis.</b>

## BONUS POINTS

Proposed projects can gain BONUS POINTS by agreeing to provide any of the following items over and above the UDO or Standard Specification requirements for their development proposal.

NOTE: No bonus points are given for UDO requirements.

### CATEGORY 1 – Non-Conformity Abatement and Public Infrastructure Improvements

<b>Section 1A - Abatement of Nonconformities</b>		(Max - 3 points)
	Abatement of any existing non-conforming structures	3
	Abatement of any existing non-conforming use of land	2
	Abatement of any existing non-conforming lots	1

<b>Section 1B - Roadway Infrastructure Not Warranted by TIA/UDO/CTP</b>		(Max - 10 points)
	Construction of full cross section of existing off-site public street	5
	Nearby intersection improvements	5
	Traffic signal improvements	4
	Signage or striping improvements	1

<b>Section 1C - Off-Site Public Greenway Improvements</b>		(Max - 10 points)
	Construct more than 4000 linear feet of 10-foot-wide path	10
	Construct more than 3000 linear feet of 10-foot-wide path	8
	Construct more than 2000 linear feet of 10-foot-wide path	6
	Construct more than 1000 linear feet of 10-foot-wide path	4
	Construct 500 to 1000 linear feet of 10-foot-wide path	2

<b>Section 1D – Off-Site Bike-Ped Improvements</b>		(Max – 5 points)
	Construction of off-site sidewalk improvements (Subject to TRC Approval)	2
	Construction of off-site bike lane improvements (Subject to TRC Approval)	3

### CATEGORY 2. Green Development Standards/ Building & Site Design

<b>Section 2A - Conservation of Natural Habitat Meeting Active Open Space Requirements as Defined in the UDO</b>		(Max - 10 points)
	One point per acre up to 10 acres	1 - 10

<b>Section 2B - Parking</b>		(Max – 15 points)
	Structured Parking Facilities - must reduce footprint by 20%	10
	EV Charging Stations (two-port)	5
	Provision of on-street public parking (1 point per stall up to 10 Max)	1 - 10

<b>Section 2C - Stormwater SCM's</b>		(Max – 10 points)
	<b>Stormwater - Restored Riparian Buffer</b>	10
	Construct a fountain or other stormwater amenity within the BMP/SCM (as approved by Staff)	4
	Stormwater - Landscaped Green Roof	5
	Stormwater - Underground capture system for on-site irrigation	5
	Stormwater - Bioretention	5
	Stormwater - Wetland	5
	Exclusive use of porous pavement in parking areas where suitable	2

<b>Section 2D - Building/Site Design</b>		(Max - 20 points)
	Compliance with residential design guidelines per Section 5.2 of the UDO	10
	Non-Residential building design that incorporates an active upper story.	5
	Pedestrian oriented and walkable site design which promotes alternatives to vehicular travel within the development. (Subject to TRC Approval)	5

<b>Section 2E - Infill/Redevelopment</b>		(Max – 16 points)
	Development or Redevelopment within DTC	10
	Development or Redevelopment within DTP	6
	Redevelopment of previously vacant building space over 20,000 square feet	6
	Redevelopment of previously vacant building space under 20,000 square feet	5

<b>Section 2F - Historic Preservation</b>		
	Historic Structure Preservation via Deed Restriction (Determined by TRC)	10
	Restoration of Historic Structure (Must be approved by TRC)	5

<b>Section 2G – LEED Certification</b>		(Max – 10 points)
	LEED Certification for Neighborhood Development (LEED ND)	10
	Platinum LEED Certification	10
	Gold LEED Certification	8
	Silver LEED Certification	6
	Bronze LEED Certification	4
	LEED Certified Certification	2

CATEGORY 3 – Outdoor Enhancement and Transit Improvements

<b>Section 3A – Outdoor Enhancement</b>		(Max – 12 points)
	Construction of a Parkway Street Section on a Collector level street	5

	Construction or Preservation of Gateway Landscaping or Structure (Subject to Comprehensive Plan Consistency and TRC approval)	5
	Outdoor Display of Public Art (Subject to TRC Approval)	4
	Public Facing Outdoor Mural (Subject to TRC Approval)	4
	Maintenance of Roadside Gateway Plant Bed (requires maintenance agreement)	3
	Planting Pollinator Garden (225 Square Foot Minimum)	3
	Exclusive use of xeriscaping techniques and drought tolerant species	3
	Enhanced Roadside Landscaping (Subject to TRC Approval)	2
	Enhanced Buffer Landscaping (Subject to TRC Approval)	2
	Construction of a Parkway Street Section on a Local level street	2
	Installation of Native Shade Tree Species (per Tree up to 10 Trees)	1

<b>Section 3B – Transit (Pursuant to location being adjacent to a planned or active transit route)</b>		(Max - 8 points)
	Provision of more than 50 designated Park & Ride Stalls	8
	Provision of 25 designated Park & Ride Stalls	5
	Provision of 10 designated Park & Ride Stalls	3
	Provision of mass transit easement w/ structure (bus stop with shelter & bench)	2

#### CATEGORY 4 - Amenities

<b>Section 4A - Private Greenway</b>		(Max - 3 points)
	Construction of more than 3000 linear feet private greenway meeting Town of Zebulon standards	3
	Construction of more than 2000 linear feet of private greenway meeting Town of Zebulon standards	2
	Construction of more than 1000 linear feet of private greenway meeting Town of Zebulon standards	1

<b>Section 4B – Pool (Combinations may be approved by TRC)</b>		(Max - 8 points)
	Olympic Pool and Aquatic Center	8
	Junior Olympic Pool	5
	Lap Pool (four lane minimum)	3
	Resort Style Pool	2
	Any Other Pool	1

<b>Section 4C - Outdoor Deck/Patio</b>		(Max - 3 points)
	Deck/Patio - More than 3000 square feet	3
	Deck/Patio - More than 2000 square feet	2
	Deck/Patio - More than 1000 square feet	1

<b>Section 4D - Pool Amenities</b>		(Max - 2 points)
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Jacuzzi/Hot Tub/Whirlpool	2
Water Playground with apparatus	2
Sauna/Steam room	2

<b>Section 4E - Clubhouse</b>		(Max - 10 points)
Commercial Coffee Shop with at least 10 designated public seating spaces.	10	
With full kitchen and over 4000 square feet of meeting space	10	
With full kitchen and less than 4000 square feet of meeting space	9	
Meeting space without kitchen more than 3500 square feet	8	
Meeting space without kitchen 2500 - 3499 square feet	7	
Meeting Space without kitchen 1500 - 2499 square feet	5	
Meeting Space without kitchen less than 1500 square feet	4	
No meeting space, bathrooms and changing rooms only	3	
Outdoor Kitchen or Grills	2	

<b>Section 4F - Additional Active Recreation</b>		(Max - 10 points)
Gymnasium (regulation size indoor basketball court)	10	
Baseball/Softball Field (regulation size)	5	
Football/Soccer Field (regulation size)	5	
Skate Park	5	
Tennis Courts (two regulation courts, fenced)	5	
Multi-Use Hardcourt (two regulation basketball courts, street hockey, fenced)	5	
Pickleball Court (three regulation courts, fenced)	5	
Pocket Park – 5,000 square feet	3	
IPEMA Certified Playground Equipment	4	
Lighted Field of Play for nighttime use	3	
Electronic Scoreboard or Covered Dugouts or Bleachers	3	
Community Garden – 15-foot by 15-foot, with water access and potting shed.	3	

<b>Section 4G – Additional Urban Open Space Enhancements (Within Non Residential Zoning Districts)</b>		(Max – 10 points)
Fountain	2	
Canopy Including Fixed Permanent Seating	2	
Drinking Fountain with Pet Fountain	2	
Permanent Game Tables	1	
Permanent Tables with Shade Cover	1	
All Weather Bulletin Board	1	
Covered or Internal Bicycle Parking	1	
Artist-Design Bicycle Racks	1	
Little Free Library	1	
Drinking Fountain	1	
Public Work Bike Stand With Tools	1	

CATEGORY 5 – Affordable Housing

<b>Inclusion of a percentage of the provided housing stock of a proposed development cost no more than 30% of a household income not exceeding 80% of the Area Median Income (AMI)</b>		(Max – 10 Points)
	15% Affordable Housing	10
	10% Affordable Housing	5

CATEGORY 6 – Other

(Max 5 Points)

	Integrated public safety operation systems (EX. Flock Safety or others as approved by the Police Department)	3
	Smart Waste and Recycling Stations	2





March 15<sup>th</sup>, 2024

Mike Nedriga  
 Capital Properties of NC, LLC  
 1540 Grand Willow Way  
 Raleigh, NC 27614  
 cpncllc@gmail.com  
 919-779-9664

**RE: Trip Generation Memorandum  
 901 Mack Todd Road, Zebulon, NC**

Dear Mr. Nedriga,

Timmons Group is providing traffic engineering services for the proposed residential development located at 901 Mack Todd Road in Zebulon, NC. The proposed development will consist of 13 townhome units. Per Town of Zebulon (Town) Unified Development Ordinance (Section 6.13.3), a Traffic Impact Analysis (TIA) is required when projected peak hour trips exceed 100 vehicles per hour (VPH).

The site-generated trips shown in **Table 1** are based on trip generation information provided in the 11<sup>th</sup> Edition of the Institute of Transportation Engineers' (ITE's) *Trip Generation Manual* and the anticipated development size. The trip generation was calculated using the proposed number of residential units as the independent variable and the provided regression equation.

**Table 1: Trip Generation Summary**

ITE Land Use Code	Independent Variable	ADT	AM Peak Hour			PM Peak Hour		
			In	Out	Total	In	Out	Total
215-Single-Family Attached Housing	13 Units	94	0	1	1	2	2	4

SOURCE: Institute of Transportation Engineers' *Trip Generation Manual* 11<sup>th</sup> Edition (2021)

AM peak hour trips totaled 1 incoming and 0 outgoing where PM peak hour trips totaled 2 incoming and 2 outgoing. Average daily traffic (ADT) volumes generated by the development totaled 94 VPD. No trip reductions were included due to internal capture or pass-by trips.

As shown in **Table 1**, projected trips do not meet the Town's peak hour trip threshold (100 VPD). Therefore, no TIA is required due to the development's construction.

Should you have any questions regarding this memorandum, do not hesitate to contact me.

Sincerely,

Jeffrey P. Hohanadel, PE, PTOE  
 Principal | North Carolina Transportation Group Leader

# **Planned Development Rezoning**

## **901 Mack Todd Road**

### **A Planned Development**

#### **Zebulon, North Carolina**

**Date:** February 1, 2024

**Revised:** April 12, 2024

**Revised:** May 6, 2024

#### **Owner/Developer:**

##### **Capital Properties of North Carolina LLC**

1540 Grand Willow Way

Raleigh, NC 27614

(919) 779-9664

Contact: Michael Nedriga

#### **Consultants:**

##### **Landscape Architecture & Land Planning:**

###### **TMTLA Associates**

5011 Southpark Drive, Suite 200

Durham, NC 27713

919-484-8880

Contact: Pam Porter

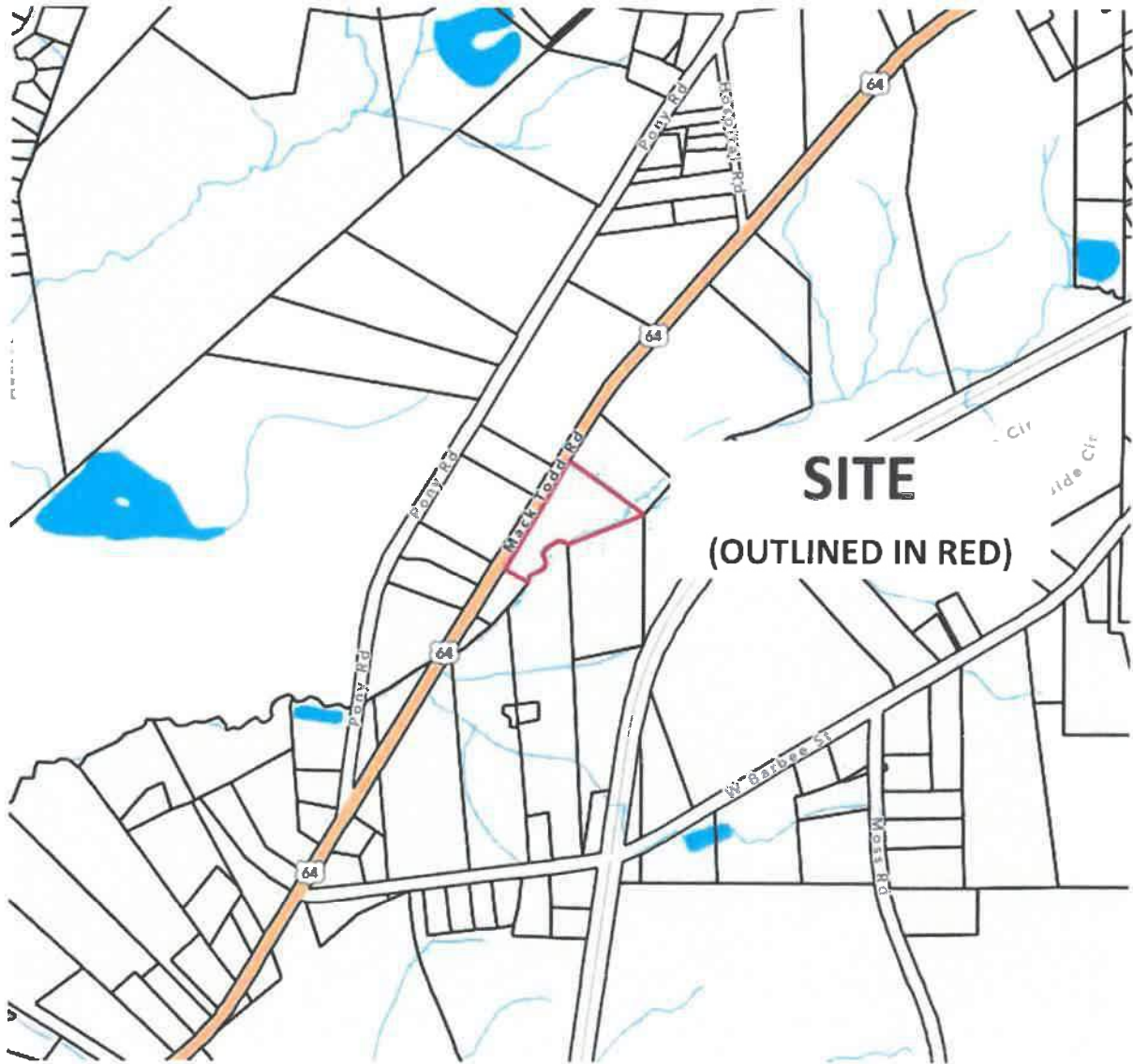
[pam@tmtla.com](mailto:pam@tmtla.com)

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## Section 2: Vicinity Map



## **Section 3: Project Data**

Name of the Project: 901 Mack Todd Road

Applicant/Prepared by:

Pamela Porter, PLA, LEED AP  
TMTLA Associates  
5011 Southpark Drive, Suite 200  
Durham, NC 27713  
Phone: 919-484-8880  
[pam@tmtla.com](mailto:pam@tmtla.com)

Current and Proposed Zoning:

Current: R-4  
Proposed: PD

Proposed Land Use:

Suburban Residential

Size of Project:

2.30 acres

## **Section 4: Purpose Statement**

901 Mack Todd Road is a small 2.30-acre parcel that sits about one mile west of Downtown Zebulon. The location and size of this lot position it perfectly for a small single family attached infill development.

This development is currently zoned R-4C. The Future Land Use Map designates this lot as IL. This lot, however, is not suited for industrial development given its size and the amount of environmentally sensitive areas located within it's boundary. We are proposing the Future Land Use Map be changed to Suburban Residential, which supports single family attached development, to accommodate this request.

The intent of this Planned Development is to provide high-quality single family attached housing tucked in around the environmentally sensitive areas within the boundaries of our development while also providing opportunities for gathering and recreation. The commitment to preservation of open space and providing a variety of amenities is to reconnect people within the community to nature as well as each other.

Bordered by a stream to the east, this development will protect the riparian buffer from development. A greenway, as shown on the Town's Greenway Plan, will be constructed as part of this development.

The residential development will fulfill the need for housing stock. The preservation of the environmentally sensitive areas and the greenway fulfill the Zebulon Town of Zebulon Comprehensive Plan and Land Use Map for Open Space.

Access to the site will be provided via a private alley. The units in this development will be rear-loaded and either front on Mack Todd Road or front on open space. No public street are proposed with this development.

The proposed Planned Development will meet all requirements of the Zebulon Transportation Plan. Open space shall exceed the Town of Zebulon minimum requirement of 10% as over 50% of the development will be open space.

The 901 Mack Todd Road Planned Development will be sensitive to and compatible with surrounding uses and proposed development character. The development will enhance the value of surrounding property values.

Phasing:

This development is proposed to be developed in no more than two phases.

## Section 5: Permitted Uses

Table 1 below provides a listing of the proposed permitted uses for the 901 Mack Todd Road PD Development. This listing allows the development to fulfill the intent of the commitment to a mix of residential uses. Uses are subject to general and specific regulations of the Town of Zebulon UDO.

**Table 1**

PERMITTED USES TABLE	
USE TYPE	P = Permitted Use
Residential Uses	
Single Family Attached and permitted accessory uses	P

## Section 6: Design Controls

### Residential – 2.30 acres

#### Density

Density: 5.65 dwelling units per acre max (overall)

Units: 13 dwelling units max  
All units shall be Single Family Attached.

#### Building Height

Maximum Height / # of Stories: 35 ft. / 3 Stories

**Building Setbacks** (see below)

Front:	5 ft. min. for lots 10-13 7.5' min. for lots 1-9
Side:	5 ft. min.
Rear:	10 ft. min.

Note: All single family attached units shall be rear loaded.

**Buffers (Refer to PD Map)**

**Streetscape Buffers:**

Mack Todd Road

None proposed in front of units; foundation plants along the front façade of the units that front on Mack Todd Road in lieu of a streetscape buffer.

A modified 15' Type C buffer shall be provided along the frontage that does not contain residential units.

**Perimeter Buffers:**

Adjacent to the adjoining lots

Type A buffer along PIN 1795-82-9159 where single family attached units are located adjacent to the shared property line as shown on concept plan.

All streetscape and perimeter buffers shall be provided in accordance with the Town of Zebulon UDO



## **Section 7: Architectural Standards**

### Standard Rezoning Conditions

The style of buildings will be any variety of the following: Craftsman, Traditional, Colonial, Neoclassical. the intent is to foster multiple styles to create a community that is not monotonous.

All residential structures shall have three (3) or more of the following features:

- Front Porch
- Awnings
- Columns
- Balconies
- Broken Roof Lines
- Dormer
- Arched Architectural Features
- Chimney
- All Brick -or All Stone Façade
- Other architectural features approved by the Planning Director

All residential structures shall have at least four (4) of the following features:

- Decorative Shake
- Decorative Porch Railings/Posts
- Shutters
- Decorative/Functional Air Vents on Roof or Foundation
- Trimmed Windows or Recessed Windows
- Decorative/Period Windows
- Decorative Brick or Stone (10% min. required on the front elevation)
- Decorative Gables
- Decorative Cornices
- Tin/Metal Roof
- Other decorative features approved by the Planning Director.

#### **Roofs:**

Roof lines shall be varied to reduce the scale of the structure and add visual interest. Rood shapes (for example: flat, hip, mansard, gable, or shed) and material shall be architecturally compatible with façade elements and the rest of the structures. Shed roofs may be used on porches and dormers.

#### Facades:

- The principal structure's front façade must incorporate recesses and projections along at least 50% of the length of the façade. Windows, awnings, and porch area shall total at least 50% of the façade length abutting a public street.
- Façades shall incorporate a repeating pattern of change in color, texture, and material modules.
- Façade renovations shall incorporate original building details to the maximum extent practicable.
- If roof cornices have been removed or damaged on an existing structure, renovations of that structure must include retaining, repairing, and replacing the roof cornices.

#### Entryways:

- Doors shall have built-in windows; alternatively, a solid door is allowed provided side lights (side windows) are installed immediately adjacent to the solid door.
- Variations in color schemes and textures are encouraged in order to articulate entryways so as to give greater recognition to these features.

#### Materials and Color Palette:

- Predominant exterior building materials shall be high quality materials, including brick, wood, stone, fiber cement, and/or wood composite. Vinyl siding is not permitted; however, vinyl windows, decorative elements and trim are permitted.
- Front and side porches with open foundations shall have brick or stone piers and openings shall be fully screened with evergreen plantings.
- A varied color palette shall be utilized on homes throughout the subdivision and shall include siding, trim, shutter, and accent colors complementing the siding colors.

#### Single-family Attached (Townhomes) - Specific Requirements:

1. Each house will have a min. of 2 stories and a maximum of 3 stories.
2. Min. dwelling size shall be 1,200 s.f.
3. All townhomes may have a raised slab foundation or crawl space.
4. Garage doors must have windows, decorative details or carriage-style adornments.
5. The front elevation of each single family attached unit shall contain a min. of 10% masonry (brick or stone) and shall contain a min. of two siding materials (i.e. stone and hardiplank; brick and shake). No two

- consecutive units within a single building shall contain the exact same front elevation with regard to materials or color palette.
6. All sides of a principal structure that face an abutting public street shall have architectural and decorative features as described above.
  7. A mail kiosk shall be located internal to the development as shown on the conceptual plan. If a kiosk shelter is incorporated it shall be designed with similar architectural style, materials, and color palette as the homes in the neighborhood. The kiosk shelter may be partially enclosed or open on all 4 sides.

We commit to exceed the architectural requirements in Section 5.2.4 of the UDO.

## **Section 8: Parking and Loading**

All parking and loading areas shall comply with all applicable requirements of the Town of Zebulon UDO Section 5.8. Electric vehicle (EV) charging stations shall be provided for two of the parking spaces.

## **Section 9: Signs**

All signage shall comply with applicable standards and requirements of the Town of Zebulon UDO Section 5.11.

## **Section 10: Public Facilities**

### Water and Sanitary Sewer:

All lots shall be served by City of Raleigh water and sanitary sewer.

### Streets:

No streets being proposed internal to the development.

Mack Todd Road - dedicate 5' of right of way. Build  $\frac{1}{2}$  of the ultimate 70' Right-of-Way section less median. Provide a fee in lieu for  $\frac{1}{2}$  of the 12' wide median. Roadway section will include 5' wide sidewalk for the full length of property.

### Sidewalks:

A 5' wide sidewalk shall be provided along the frontage of 901 Mack Todd Road.

### Alleys:

All residential alleys shall be public and shall be a 26' asphalt pavement within a 30' wide Town of Zebulon Alley Right of Way. Alleys shall be maintained by the HOA.

### Greenway Trails:

Developer shall provide easement for and construct the section of the Corridor 8 greenway that runs along the east side of the development.

## **Section 11: Natural Resource and Environmental Data**

### Existing Vegetation:

This development site consists of wooded forests and scrubby undergrowth. Wooded areas differ from dense hardwood forested areas to softwood pine stands typical of the region and is mainly located within the extents of the stream buffer along the east side of the site. The area of scrubby undergrowth is situated where site development will take place.

Existing streams with designated and delineated buffers protected by and in accordance with the Town of Zebulon UDO and NCDWR Regulations. Any and all impacts requiring permits shall be obtained and permitted thru the Town of Zebulon, NCDWR, and the US Army Corps of Engineers where applicable.

This site is within the Neuse River Basin.

No portion of this site are located within Special Flood Hazard areas defined by FEMA FIRM Map 3720179500K dated July 19, 2022.

### Historic Structures and Significance:

This site does not contain any historic structures or contains any historical significance.

## **Section 12: Stormwater Management**

901 Mack Todd Road will meet all applicable requirements and standards as described in the Town of Zebulon Street and Storm Drainage Standard and Specifications Manual. This project will meet all stormwater reduction requirements including limiting the post-development stormwater flows to not exceed the pre-development stormwater runoff.

The 901 Mack Todd Road Development will use approved devices to control the stormwater and sediment runoff. These devices may include detention ponds, retention ponds, bio-retention areas or any other approved BMP stormwater control. Stormwater control devices shall be landscaped and constructed to be an amenity to the development and shall blend into the surroundings.

A fountain will be provided in the SCM.

## **Section 13: Parks and Recreation**

50% of our open space shall be urban open space per UDO Sec. 5.7.4.

The following list of amenities shall be included in the urban open space area as noted on the concept plan:

Open Space #1:

- Pocket Park (5,000 s.f.)
- Outdoor Grill
- Two Picnic Tables
- Pollinator Garden (min. 225 s.f.)

Open Space #2:

- Community Garden (with storage shed)

Open Space #3:

- Dog Park: Min. 1,500 s.f. of fenced area; shall include a min. of one benches, one trash can, one dog waste station, and one drinking

fountain with dog fountain. Dog park fence shall be a min. of 4' tall chain link fence – either galvanized or vinyl-coated.

Design of these areas will be done at site plan.

In addition to the amenities in the open space area the following amenities shall be provided:

- A private connection to the Corridor 8 greenway trail shall be provided. Exact location to be determined at site plan.
- An artist designed bicycle rack shall be provided adjacent to the mail kiosk.
- Outdoor display of public art (TBD) to be located adjacent to guest parking.
- Pollinator Garden. Exact location to be determined at site plan.

Developer shall provide easement for and construct the section of the Corridor 8 greenway that runs along the east side of the development.

## **Section 14: Consistency with Comprehensive Plan and Land Use Map**

901 Mack Todd Road is consistent with the Town of Zebulon Comprehensive Plan and Land Use Map goals and objectives.

1. This development proposes single family attached residential development, which supports the desire for a variety of housing types and price points within the Town limits. This will help to draw new residents to the Town as well as keep existing residents within Town limits when looking to move.

2. This development proposes a higher density residential development that is nestled around the environmentally sensitive areas located on this site. This helps to buffer our development from adjacent development that is not as dense as our proposal.

3. This development will assist in the expansion of the sidewalk and greenway network in the Town.

In summary, this development proposal is consistent with the goals and objectives of the Town of Zebulon Comprehensive Plan.

While this development is not consistent with the Future Land Use Map, this parcel is not suited to light industrial development due to its size, shape, and the presence of environmentally sensitive areas. Given the proximity to Downtown Zebulon, this site is suited better towards a small residential infill development.

### **Section 15: Compliance with the UDO**

The Project will comply with all other relevant portions of the Town of Zebulon Unified Development Ordinance.

### **Section 16: Features of Development Included per the Utility Allocation Policy**

Points Required: 60

<u>Point Item</u>	<u>Point Value</u>	<u>Location (if known)</u>
Base Points	20	
EV Charging Station (two-port)	5	Guest Parking
Fountain/Stormwater Amenity in SCM	4	SCM
Compliance with UDO Sec. 5.2	10	Building Design
Outdoor Display of Public Art	4	TBD at Site Plan
Pollinator Garden (225 sf. Min)	3	Open Space #1
Enhanced Buffer Landscaping	2	Next to Lots 1 & 13
Installation of Native Shade Trees	1	In Type A Buffer
Outdoor Kitchen or Grill	2	Open Space #1
Pocket Park (5,000 sf. Min.)	3	Open Space #1
Community Garden <i>(15' x 15' with water access &amp; potting shed)</i>	3	Open Space #2
Drinking Fountain with Pet Fountain	2	Open Space #3
Artist-Designed Bicycle Rack	1	Next to Mail Kiosk
<b>TOTAL</b>	<b>60</b>	

## Section 17: Zoning Conditions

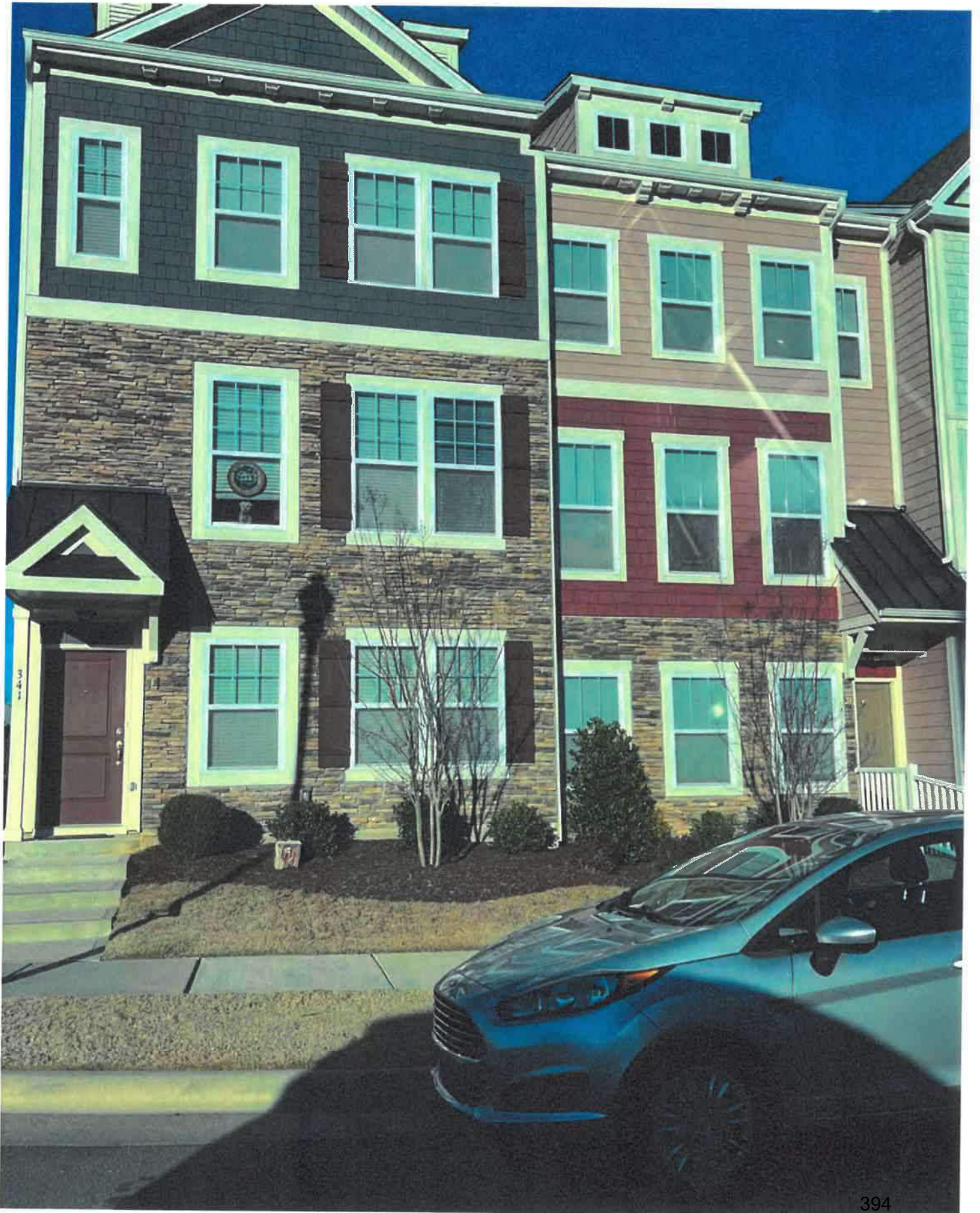
The following zoning conditions are being offered for consideration:

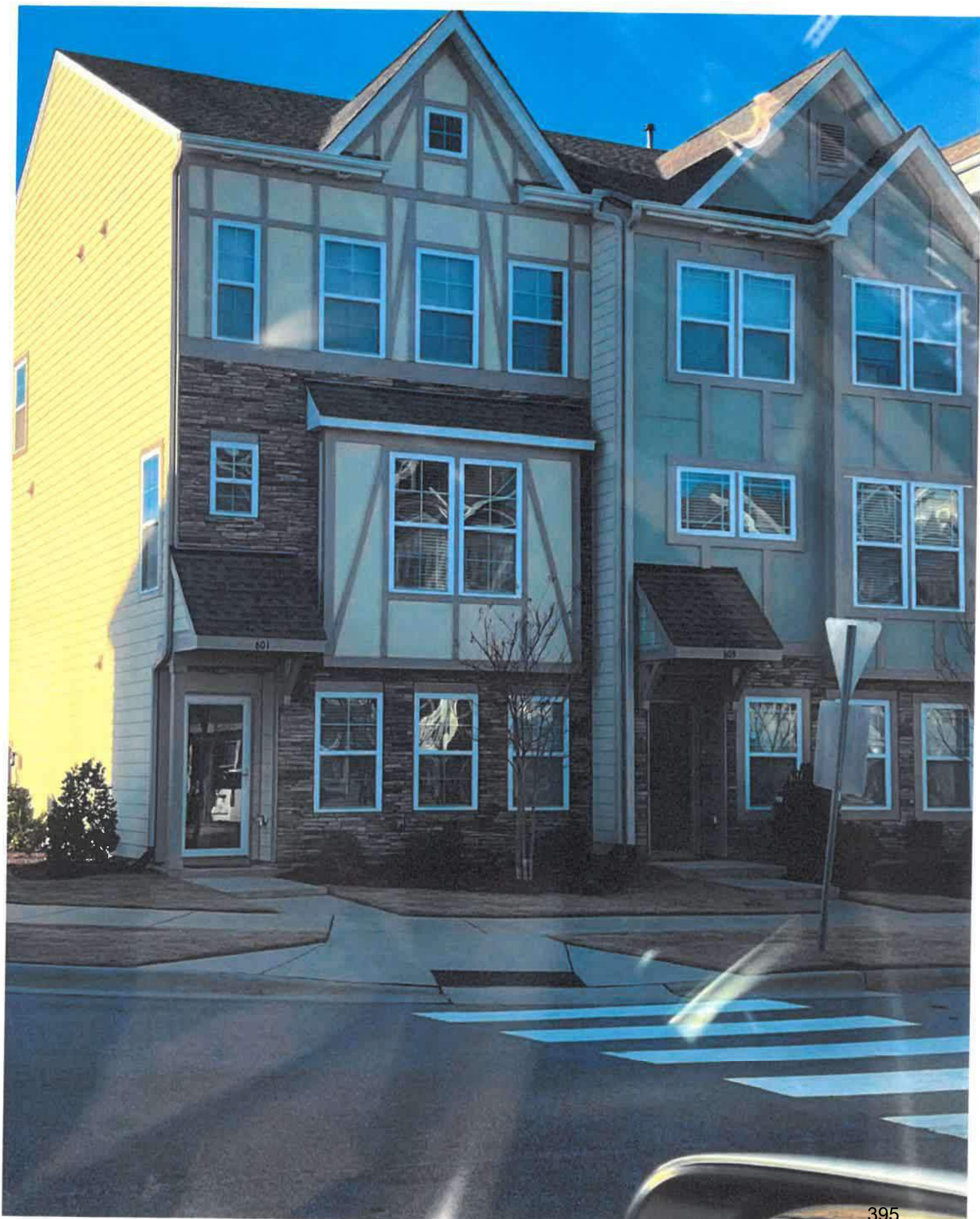
- 1) Uses shall be limited to single family detached, single family attached, and permitted accessory uses.
- 2) Minimum single family attached unit shall be a minimum of 1,200 s.f..
- 3) Minimum driveway stem length shall be 20'.
- 4) Mack Todd Road - dedicate 5' of right of way. Build  $\frac{1}{2}$  of the ultimate 70' Right-of-Way section. Roadway section will include 5' wide sidewalk for the full length of property.
- 5) This project shall not utilize mass grading.
- 6) Provide a 10' wide Type A buffer along PIN 1795-82-9159 where single family attached units are located adjacent to the shared property line as shown on concept plan.
- 7) Provide foundation plants along the front façade of the units that front on Mack Todd Road in lieu of a streetscape buffer. A minimum of the following shall be planted: 3 evergreen shrubs (12" height @ installation) per unit and shall be a plant that can be maintained at 18" height where located in the sight triangle. Plant selection to be determined at site plan. See detail on L-2 for typical example of foundation landscaping.
- 8) Slab foundation shall be permitted.
- 9) Vinyl siding shall not be permitted but vinyl accents, such as windows, decorative trim, and other elements shall be permitted.
- 10) Developer shall provide easement for and construct the section of the Corridor 8 greenway that runs along the east side of the development.
- 11) Native trees shall be used for any street tree or buffer planting.
- 12) 50% of the required open space shall be dedicated to urban open space.

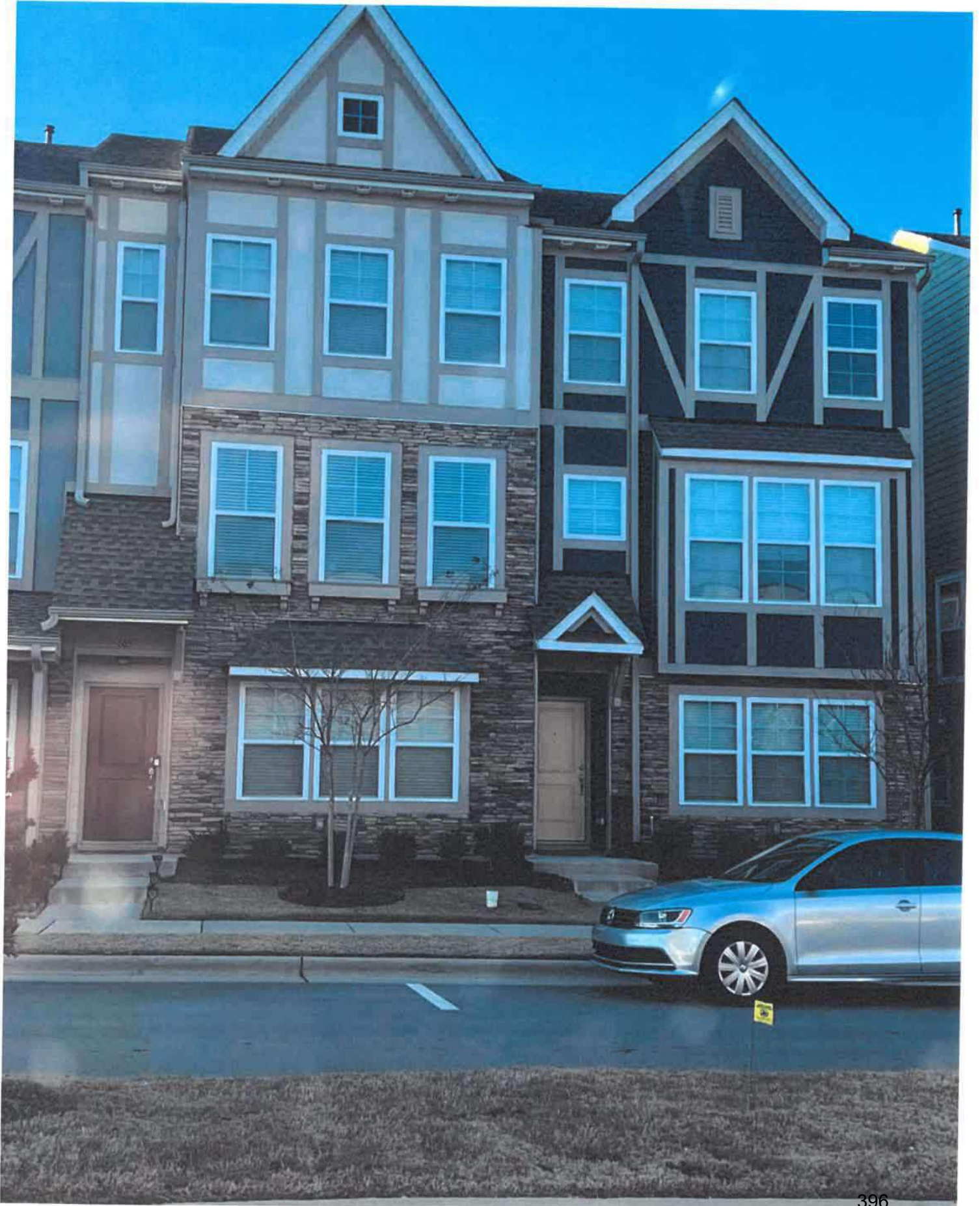


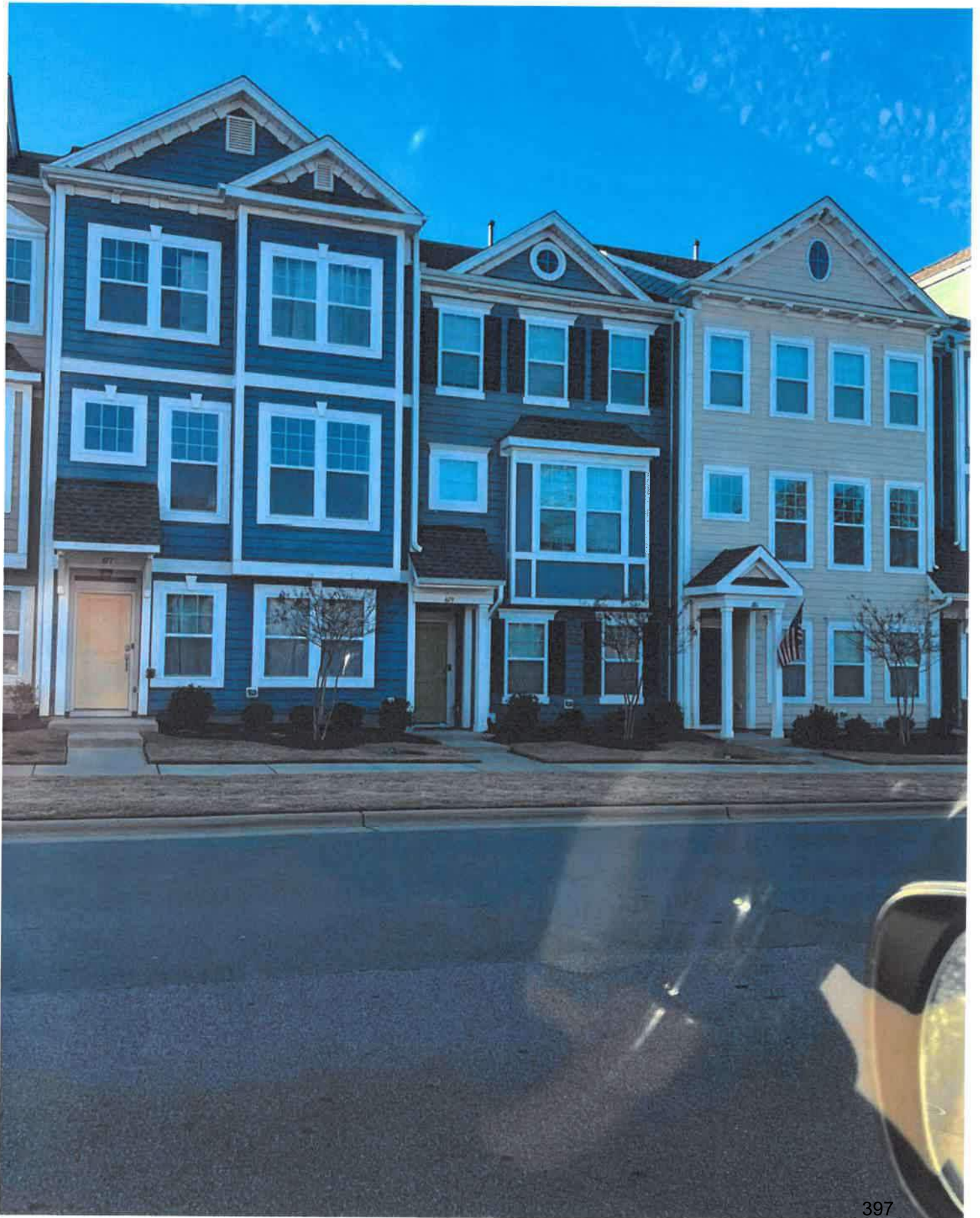
## **Appendix A: Building Elevations**

***Please note any photo or graphic shown in this Appendix is to speak to the quality of the development and are not indicative of the exact design or facade to be included in this development. Any structure within this development shall follow the architectural guidelines listed in Section 7: Architectural Standards.***



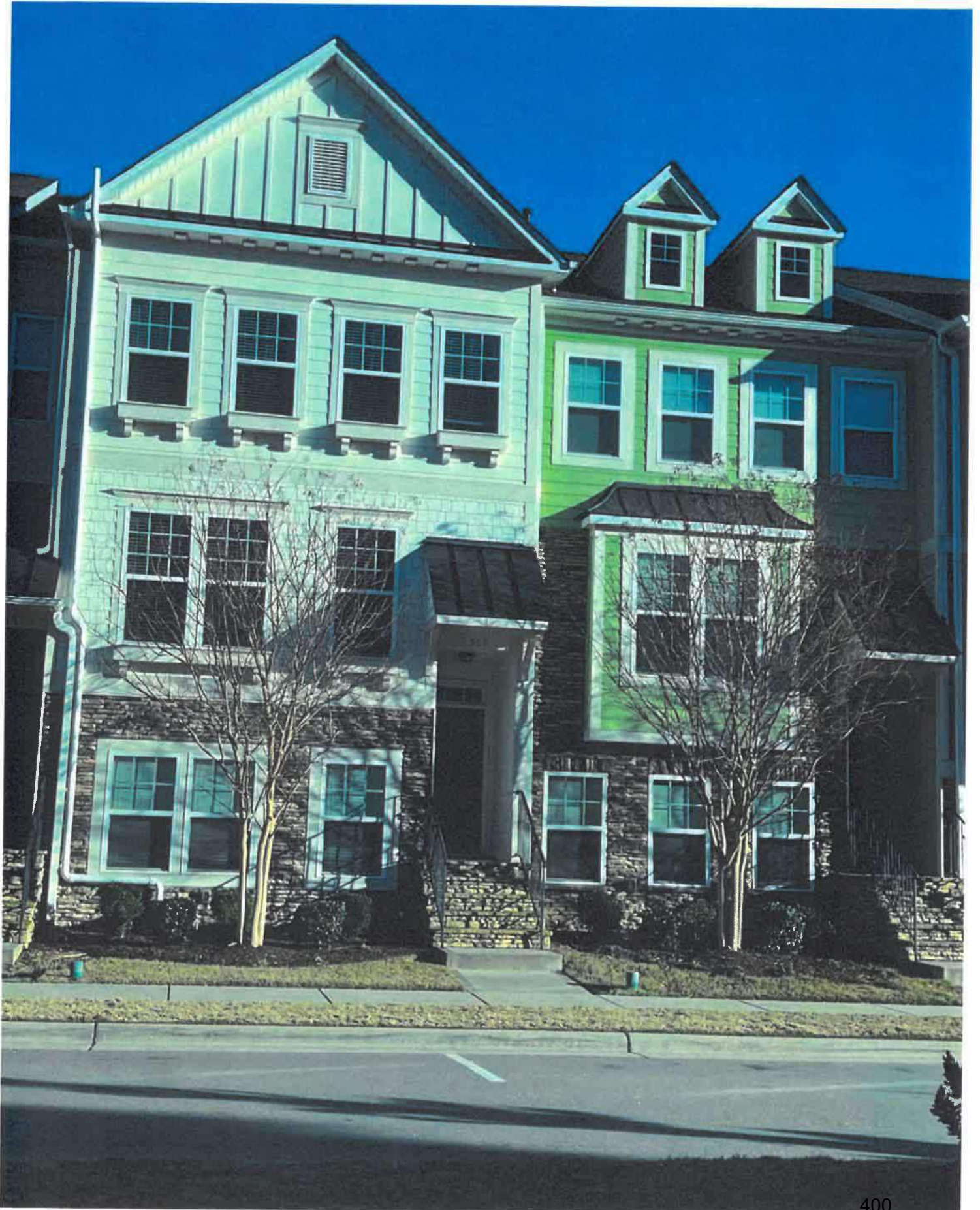




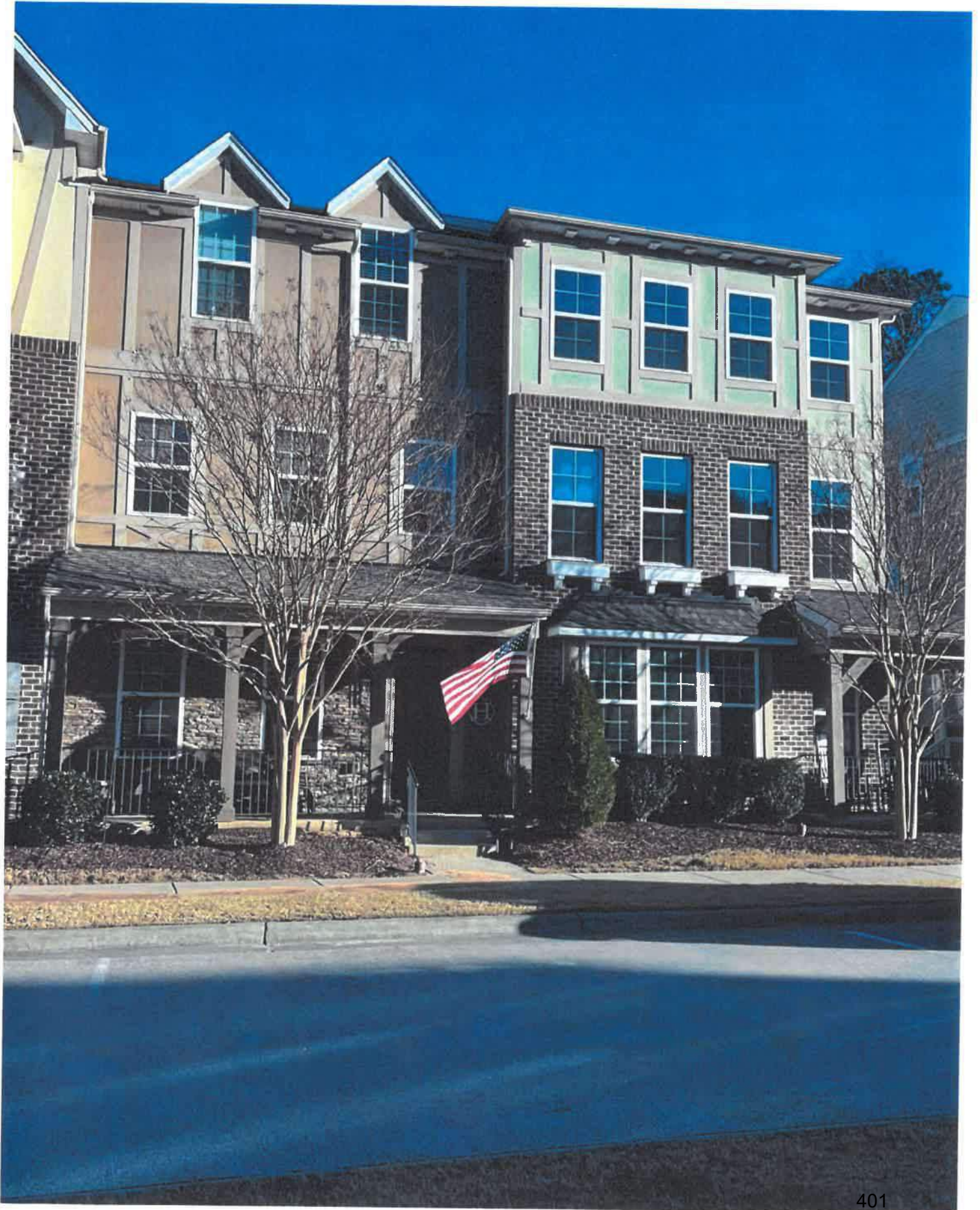


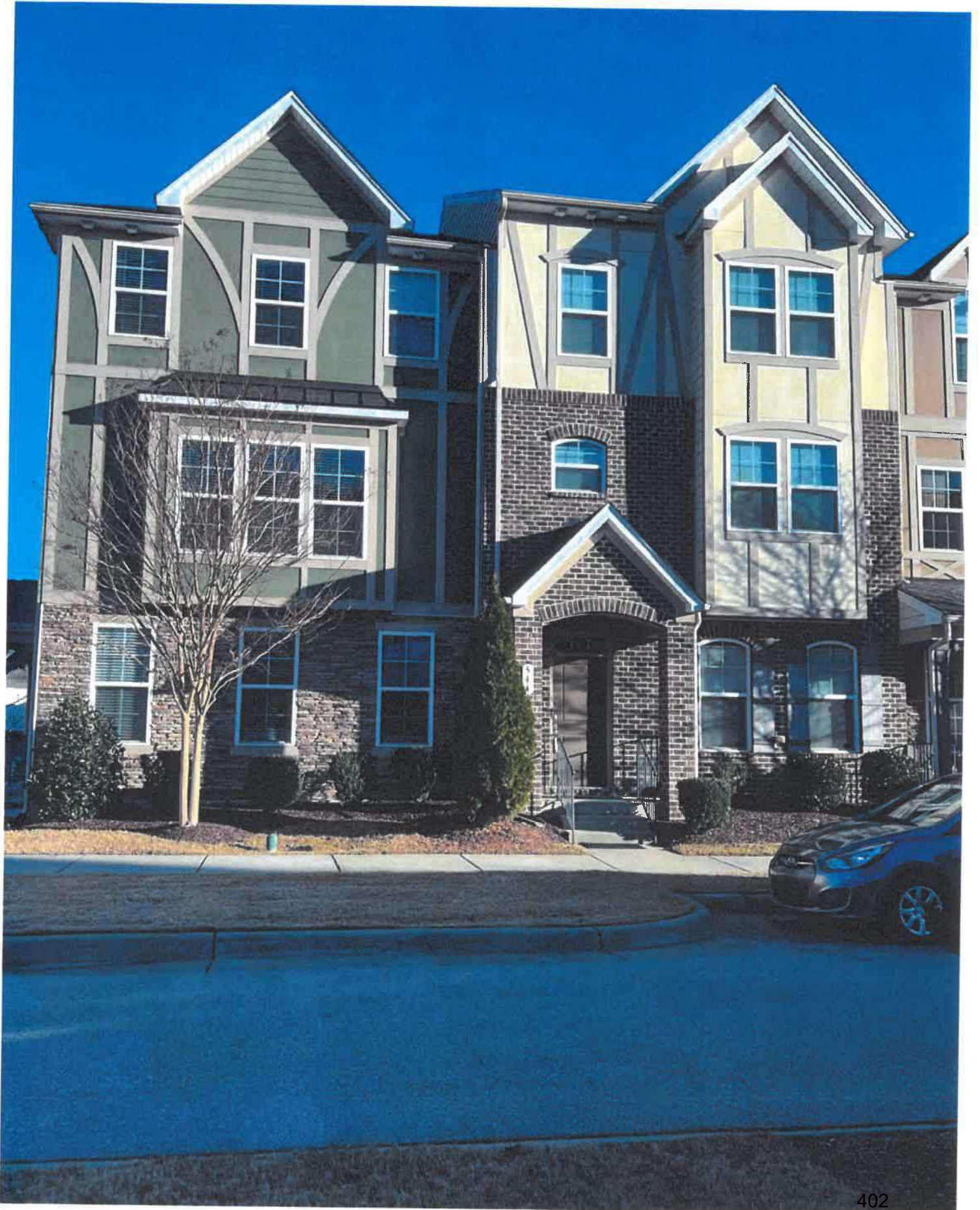












# Future Land Use Map



NC CGIA, Maxar, Microsoft

- 901 Mack Todd Rd
  - Parcels
  - Streets
- Zebulon\_FutureLandUse**
- General Residential (GR)
  - Urban Residential (UR)
  - Residential Mix (RM)
  - Suburban Commercial (SC)
  - Industrial Light (IL)
  - Industrial Heavy (IH)

# Aerial Map



- 901 Mack Todd Rd
- Parcels
- Streets

0.15 Miles

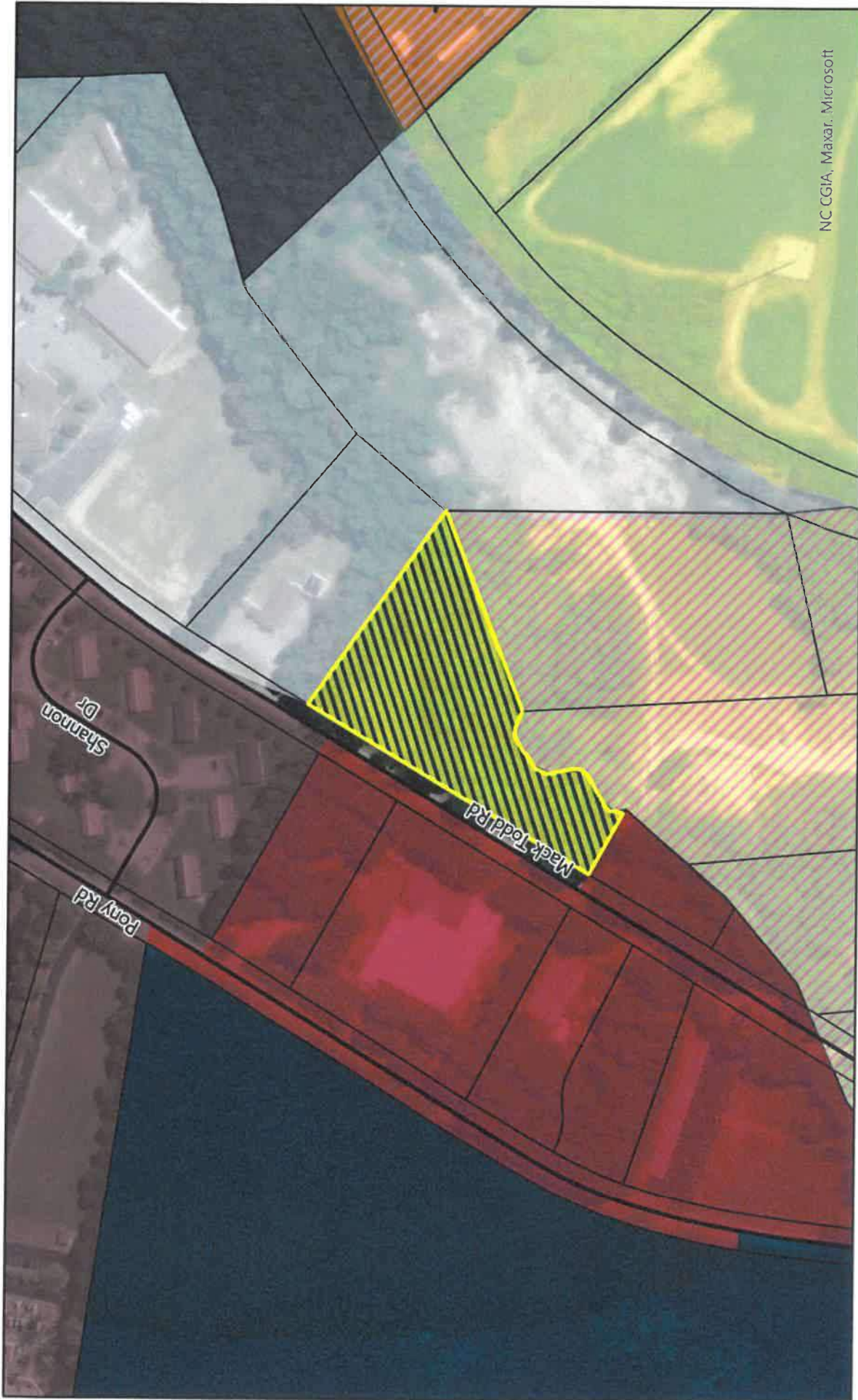
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# Zoning Map



NC CGIA, Maxar, Microsoft

- RMF, Residential Multi-Family
- HC, Heavy Commercial
- LI, Light Industrial
- HI, Heavy Industrial
- PD, Planned Development
- MHO, Manufactured Home Overlay
- CZ, Conditional Zoning

- 901 Mack Todd Rd
  - Parcels
  - Streets
- Zoning Districts**
- R2, Residential Suburban
  - R4, Residential Neighborhood
  - R6, Residential Urban





# ZEBULON

NORTH CAROLINA

CASE # PD 2024-02 IDT# 1230462 – 901 Mack Todd Rd

PROJECT ADDRESS 901 Mack Todd Rd

PIN NUMBER: 1795827060

HEARING DATE: June 10, 2024

State of North Carolina

County of Wake

BEFORE ME, the undersigned Notary, E. McKinney Warner on this 28<sup>th</sup> day of May 2024, personally appeared Michael J. Clark, known to me to be a credible person and of lawful age, who being by me first duly sworn, on his oath, deposes and says:

I Michael J. Clark, acting as the Planning Director for the Town of Zebulon, affirm that the following Public Notice Procedures have been completed in accordance with applicable North Carolina General Statute and Town of Zebulon Unified Development Ordinance Section 2.3.6 have been satisfied for the above referenced hearing.

- First Class Mailing Sent on 5/28/2024 (see attached mailing list and copy of mailing)
- Advertisement in a Paper of General Circulation sent on 5/21/2024 (Wake weekly, publication dates 5/31 & 6/7/2024)
- Posting Public Hearing Signage on Property on 5/28/2024 (pictures attached)
- Posted to Planning Department Website 5/28/2024
- Sent to E-Mail Distribution List on 5/28/2024

[Signature]

5/28/2024

Michael J. Clark, AICP, CNU-A

Date

Subscribed and sworn to before me, this 28<sup>th</sup> day of May 2024.

[Notary Seal:]

[Signature]

E. McKinney Warner

[signature of Notary]

[printed name of Notary]

NOTARY PUBLIC

My commission expires: May 23, 2027.



## **Notice of Public Hearing**

Notice is hereby given pursuant to the provisions of Article 2.3.6 of the Town of Zebulon Unified Development Ordinance that a public hearing will be held on **June 10, 2024, at 6:00 PM** at the **Zebulon Municipal Complex, 1003 N. Arendell Avenue**, and will be conducted by the Board of Commissioners and Planning Board of the Town of Zebulon for the purpose of considering the following items:

***IDT Project Number 1230462 - PD 2024-02 – 901 Mack Todd Rd***

*PIN # 1795827060.* A request by TMTLA Associates on behalf of property owner Capital Properties of North Carolina LLC, for a rezoning to the Planned Development (PD) zoning district for the development of a 13 unit Planned Development.

Public comments may be submitted to Deputy Town Clerk Stacie Paratore at [SParatore@TownofZebulon.org](mailto:SParatore@TownofZebulon.org) no later than 12:00 Noon on the day of the hearing to be read into the record. Links will be provided along with the full application packet and documentation on the Planning Department web page at <https://www.townofzebulon.org/departments/planning/public-hearing-information> For questions or additional information, please contact us at (919) 823-1816.



901 Mack Todd Road - Parcels within 750'		
Parcel Address	REID	Owner
970 MACK TODD RD	0188800	CAVALLERO, DARIO L EHMANN, DONNA CAVALLERO
750 PONY RD	0051771	CROUSE, DONNA M BULLOCK
100 SHANNON DR	0118145	HOUSING AUTH COUNTY OF WAKE
941 MACK TODD RD	0001204	JAM MAR PROPERTIES LLC
608 W BARBEE ST	0054481	BROWN, LARRY G BROWN, MARY J
535 MACK TODD RD	0075388	JNCJ PROPERTIES LLC
600 PONY RD	0036416	CHANDAK, GOVIND CHANDAK, MADHU
721 MACK TODD RD	0089314	HERITAGE BAPTIST CHURCH INC
560 W BARBEE ST	0104806	GAY FAMILY LIMITED PARTNERSHIP II
601 PONY RD	0186160	SILVER SPRING HOUSING ASSOC LLC
600 MACK TODD RD	0085216	LNP INC
950 MACK TODD RD	0115949	HSSW
780 W BARBEE ST	0252242	HERNANDEZ, MARIA A
551 PONY RD	0076634	ZEBULON HEALTH HOLDINGS LLC
0 W BARBEE ST	0337278	SMITH, TODD L
704 W BARBEE ST	0068443	PERRY QUINN PROPERTIES INC
521 DUGGINS OAK DR	0190619	ZEBULON GREEN ASSOCIATES LIMITED PARTNERSHIP
901 MACK TODD RD	0077886	CAPITAL PARTNERS OF NORTH CAROLINA LLC
0 W BARBEE ST	0476110	TODD, JAMES THOMAS JR TRUSTEE HOLDEN, BRENDA TODD HEIRS
808 W BARBEE ST	0070909	TODD, JAMES THOMAS JR TRUSTEE HOLDEN, BRENDA TODD HEIRS
934 W BARBEE ST	0070905	HARRISON, MIRANDA TODD TRUSTEE TODD PROTECTION TRUST
0 W BARBEE ST	0476109	TODD, GLENN A TODD, VERA L
820 W BARBEE ST	0070906	TODD, GLENN A TODD, VERA L
705 PONY RD	0060530	MERITAGE HOMES OF THE CAROLINAS INC
700 PONY RD	0245658	700 PONY LLC
801 MACK TODD RD	0082911	HERITAGE BAPTIST CHURCH INC
804 W BARBEE ST	0070907	PREDDY, MARY ANN TODD



**PUBLIC HEARING NOTICE**  
A Public Hearing has been scheduled for the proposed development of a residential subdivision in the Town of Zebulon, North Carolina. The hearing will be held on **Monday, March 14, 2022, at 7:00 PM** at the Zebulon Town Hall, 10000 Zebulon Road, Zebulon, NC 27592.  
Planned Development  
10000 Zebulon Road  
ZEBULON, NC 27592



**PUBLIC HEARING NOTICE**  
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Planned Development  
10000 Zebulon Road  
ZEBULON, NC 27592  
919 823-1609  
ZEBULON

## ARTICLE 3: DISTRICTS

### 3.5.5. PLANNED DEVELOPMENT (PD) DISTRICT

#### A. PURPOSE AND INTENT

The Planned Development (PD) districts are established and intended to encourage innovative land planning and site design concepts that support a high quality of life and achieve a high quality of development, environmental sensitivity, energy efficiency, and other Town goals and objectives by:

- a. Reducing or diminishing the inflexibility or uniform design that sometimes results from strict application of zoning and development standards designed primarily for individual lots;
- b. Allowing greater freedom in selecting the means of providing access, open space, and design amenities;
- c. Allowing greater freedom in providing a well-integrated mix of residential and nonresidential land uses in the same development, including a mix of housing types, lot sizes, and densities;
- d. Creating a system of incentives for redevelopment and infill in order to revitalize established areas;
- e. Promoting a vibrant public realm by placing increased emphasis on active ground floor uses, pedestrian-oriented building façade design, intensive use of sidewalks, and establishment of public gathering areas;
- f. Providing for efficient use of land resulting in smaller networks of utilities and streets and thereby lowering development and housing costs; and
- g. Promoting quality design and environmentally sensitive development that respects surrounding established land use character and respects and takes advantage of a site's natural and man-made features, such as trees, estuaries, shorelines, special flood hazard area, and historic features.

#### B. GENERAL STANDARDS FOR ALL PLANNED DEVELOPMENTS

##### 1. HOW ESTABLISHED

A planned development is established in a manner similar to the establishment of a conditional zoning district in accordance with the procedures and requirements in Section 2.2.13, Planned Development.

##### 2. MASTER PLAN REQUIRED

All development configured as a PD shall be subject to a master plan submitted and approved as part of the application to establish the district. The master plan shall:

- a. Include a statement of planning objectives for the district;
- b. Describe the specific ways in which any modifications to the generally applicable standards in this Ordinance will result in a development of higher quality than would have otherwise resulted if the development was established without any proposed modifications to the standards in this Ordinance.
- c. Identify the general location of individual development areas, identified by land use(s) and/or development density or intensity;
- d. Depict the general configuration and relationship of the principal elements of the proposed development, including general building types;
- e. Identify for the entire district and each development area the acreage, types and mix of land uses, number of residential units (by use type), nonresidential floor area (by use type), residential density, and nonresidential intensity;
- f. Identify the general location, amount, and type (whether designated for active, passive, or urban) of open space;
- g. Identify the location of environmentally sensitive lands, wildlife habitat, and resource protection lands;
- h. Identify the on-site transportation circulation system, including the general location of all public and private streets, existing or projected transit service, pedestrian and vehicular circulation features, and how they will connect with existing and planned systems;
- i. Identify the general location of on-site potable water and wastewater facilities, and how they will connect to existing systems;
- j. Identify the general location of on-site stormwater management facilities, and how they will connect to existing public systems; and



## ARTICLE 3: DISTRICTS

### 3.5. General Mixed Use Zoning Districts

### 3.5.5 Planned Development (PD) District

compliance, but shall not increase the degree to which the development fails to comply with the standards in subsection (b) above.

#### **8. CONSISTENCY WITH ADOPTED POLICY GUIDANCE**

The PD zoning district designation, the master plan, and the terms and conditions document should be consistent with the Comprehensive Plan, and any applicable functional plans and small area plans adopted by the Town.

#### **9. COMPATIBILITY WITH SURROUNDING AREAS**

Development along the perimeter of a PD district shall be compatible with adjacent existing or proposed development. Where there are issues of compatibility, the master plan shall provide for transition areas at the edges of the PD district that provide for appropriate buffering and/or ensure a complementary character of uses. Determination of complementary character shall be based on densities/intensities, lot size and dimensions, building height, building mass and scale, hours of operation, exterior lighting, siting of service areas, or other aspects identified by the Board of Commissioners.

#### **10. DEVELOPMENT PHASING PLAN**

If development in the PD district is proposed to be phased, the master plan shall include a development phasing plan that identifies the general sequence or phases in which the district is proposed to be developed, including how residential and nonresidential development will be timed, how infrastructure (public and private) and open space will be provided and timed, and how development will be coordinated with the Town's capital improvements program.

#### **11. CONVERSION SCHEDULE**

- a. The planned development application may include a conversion schedule that identifies the extent to which one type of residential use may be converted to another type of residential use or one type of nonresidential use may be converted to another type of nonresidential use (i.e., residential to residential, or nonresidential to nonresidential). These conversions may occur within development areas and between development areas, as long as they occur within the same development phase, as identified by the approved development phasing plan, and are consistent with established extents of conversion set down in the conversion schedule.
- b. In the event an applicant seeks to revise the development in accordance with an approved conversion schedule, the applicant shall provide a revised site plan depicting the proposed conversions to the TRC for review and approval prior to commencing any conversions.

#### **12. ON-SITE PUBLIC FACILITIES**

##### **a. DESIGN AND CONSTRUCTION**

The master plan shall establish the responsibility of the developer/landowner to design and construct or install required and proposed on-site public facilities in compliance with applicable Town, state, and federal regulations.

##### **b. DEDICATION**

The master plan shall establish the responsibility of the developer/landowner to dedicate to the public the right-of-way and easements necessary for the construction or installation of required and proposed on-site public facilities in compliance with applicable Town, state, and federal regulations.

##### **c. MODIFICATIONS TO STREET STANDARDS**

In approving a master plan, the Board of Commissioners may approve modifications or reductions of street design standards—including those for right-of-way widths, pavement widths, required materials, provision of public transit amenities, and turning radii, with NCDOT approval, on finding that:

- i. The master plan provides for adequate separation/integration of vehicular, pedestrian, and bicycle traffic;
- ii. Access for emergency service vehicles is not substantially impaired;
- iii. Adequate parking is provided for the uses proposed; and

## ARTICLE 3: DISTRICTS

- iv. Adequate space for public utilities is provided within the street right-of-way.

### 13. USES

The uses allowed in a PD district are identified in Table 4.2.3, Principal Use Table, as allowed subject to a master plan. Allowed uses shall be established in the master plan. Allowed uses shall be consistent with adopted policy guidance, the purpose of the particular PD district, and subject to any additional limitations or requirements set forth in Section 4.3, Use-Specific Standards, for the PD district. Nothing shall limit an applicant from seeking to modify an otherwise applicable use-specific standard in accordance with the standards in Section 3.5.5.B.2, Master Plan Required.

### C. PLANNED DEVELOPMENT TERMS AND CONDITIONS

The terms and conditions document shall incorporate by reference or include, but not be limited to:

1. Conditions related to approval of the application for the PD zoning district classification;
2. The master plan, including any density/intensity standards, dimensional standards, and development standards established in the master plan;
3. Conditions related to the approval of the master plan, including any conditions related to the form and design of development shown in the master plan;
4. Provisions addressing how transportation, potable water, wastewater, stormwater management, and other infrastructure will be provided to accommodate the proposed development;
5. Provisions related to environmental protection and monitoring; and
6. Any other provisions the Board of Commissioners determines are relevant and necessary to the development of the PD in accordance with applicable standards and regulations.

### D. AMENDMENTS TO APPROVED MASTER PLAN

Amendments or modifications to a master plan shall be considered in accordance with the standards in Section 2.2.13, Planned Development.

## General Residential

This designation covers areas of primarily single-family detached residential use where accommodation of the automobile is more visually dominant relative to more prominent green space in Suburban Residential character areas. This is typically due to relatively smaller and narrower lots, and often with limited open space set-asides or amenities for residents.

### Primary Land Use Types

- Detached residential dwellings.
- Other attached residential forms (e.g., duplexes and multiplexes, patio homes, townhomes, multi-family, etc.) as permitted by zoning.
- Planned developments, potentially with a mix of housing types and varying densities, subject to compatibility and open space standards.



Shepard's Point subdivision along Old Bunn Road, adjacent to the Hamilton Acres subdivision to the east.

### Where on the Map

In some central areas of Zebulon, such as west of N.C. 96 and north of West Gannon Avenue. Also provides a transition to Suburban Residential areas in other locations, such as north of U.S. 64/264 and southwest of town.

### Characteristics

- Residential neighborhoods with less openness and separation between dwellings compared to Suburban Residential areas.
- Auto Urban character, especially where driveways and front-loading garages dominate the front yards and front facades of homes. This can be offset by landscaping, "anti-monotony" architectural standards, and limitations on "cookie cutter" subdivision layouts characterized by straight streets and uniform lot sizes and arrangement.
- Neighborhood-oriented commercial uses may emerge over time and should be encouraged on corner sites or other locations at the edge of predominantly residential areas, at a scale and with a site design that is compatible with nearby residential uses.

# **Planned Development Rezoning**

## **901 Mack Todd Road**

**A Planned Development**  
**Zebulon, North Carolina**

**Date:** February 1, 2024  
**Revised:** April 12, 2024  
**Revised:** May 6, 2024

**Owner/Developer:**

**Capital Properties of North Carolina LLC**  
1540 Grand Willow Way  
Raleigh, NC 27614  
(919) 779-9664  
Contact: Michael Nedriga

**Consultants:**

**Landscape Architecture & Land Planning:**

**TMTLA Associates**  
5011 Southpark Drive, Suite 200  
Durham, NC 27713  
919-484-8880  
Contact: Pam Porter  
[pam@tmtla.com](mailto:pam@tmtla.com)

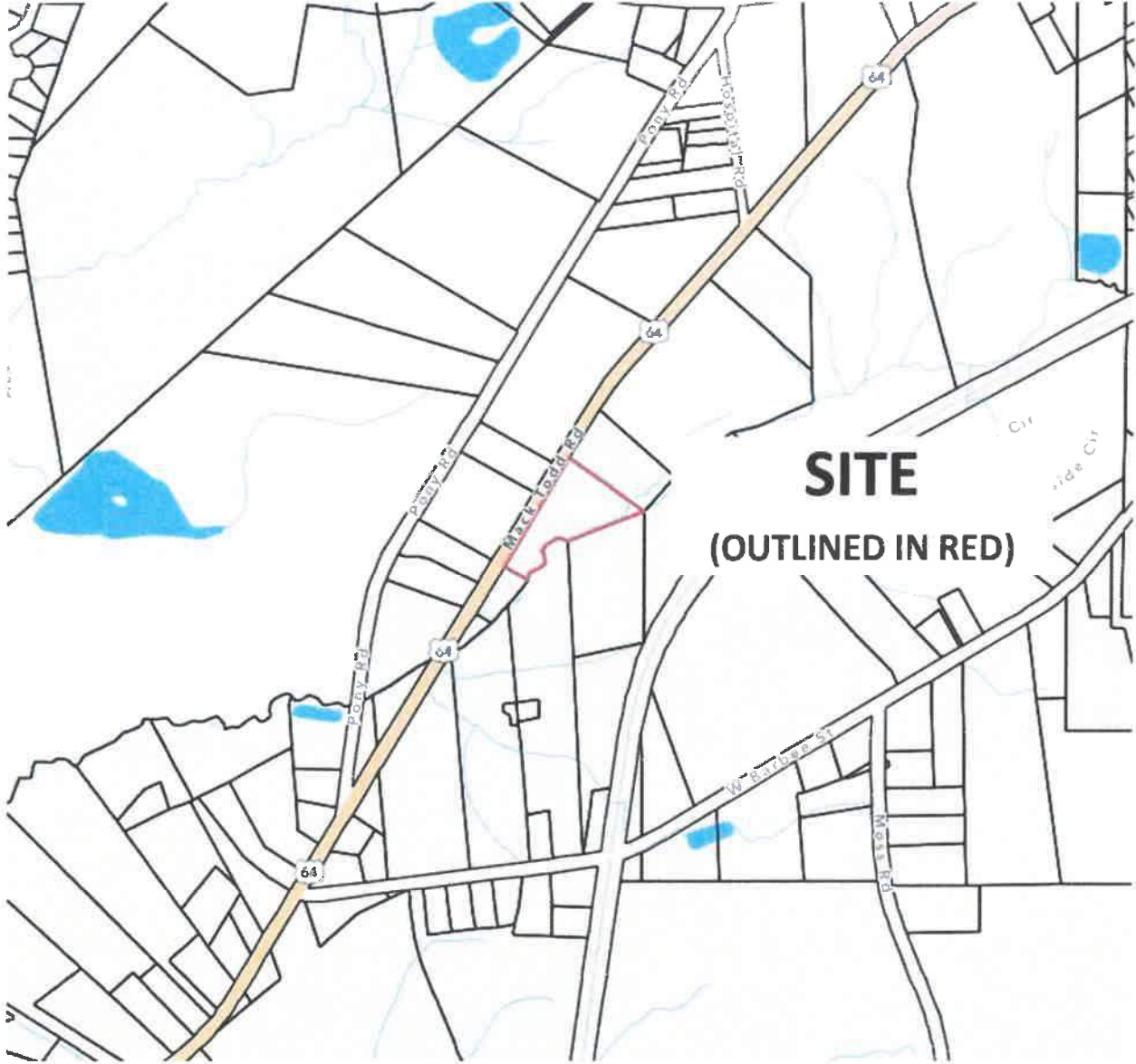


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# Section 2: Vicinity Map



## Section 3: Project Data

Name of the Project: 901 Mack Todd Road

Applicant/Prepared by:

Pamela Porter, PLA, LEED AP  
TMTLA Associates  
5011 Southpark Drive, Suite 200  
Durham, NC 27713  
Phone: 919-484-8880  
[pam@tmtla.com](mailto:pam@tmtla.com)

Current and Proposed Zoning:

Current: R-4  
Proposed: PD

Proposed Land Use:

Suburban Residential

Size of Project:

2.30 acres

## **Section 4: Purpose Statement**

901 Mack Todd Road is a small 2.30-acre parcel that sits about one mile west of Downtown Zebulon. The location and size of this lot position it perfectly for a small single family attached infill development.

This development is currently zoned R-4C. The Future Land Use Map designates this lot as IL. This lot, however, is not suited for industrial development given its size and the amount of environmentally sensitive areas located within it's boundary. We are proposing the Future Land Use Map be changed to Suburban Residential, which supports single family attached development, to accommodate this request.

The intent of this Planned Development is to provide high-quality single family attached housing tucked in around the environmentally sensitive areas within the boundaries of our development while also providing opportunities for gathering and recreation. The commitment to preservation of open space and providing a variety of amenities is to reconnect people within the community to nature as well as each other.

Bordered by a stream to the east, this development will protect the riparian buffer from development. A greenway, as shown on the Town's Greenway Plan, will be constructed as part of this development.

The residential development will fulfill the need for housing stock. The preservation of the environmentally sensitive areas and the greenway fulfill the Zebulon Town of Zebulon Comprehensive Plan and Land Use Map for Open Space.

Access to the site will be provided via a private alley. The units in this development will be rear-loaded and either front on Mack Todd Road or front on open space. No public street are proposed with this development.

The proposed Planned Development will meet all requirements of the Zebulon Transportation Plan. Open space shall exceed the Town of Zebulon minimum requirement of 10% as over 50% of the development will be open space.

The 901 Mack Todd Road Planned Development will be sensitive to and compatible with surrounding uses and proposed development character. The development will enhance the value of surrounding property values.

Phasing:

This development is proposed to be developed in no more than two phases.

**Section 5: Permitted Uses**

Table 1 below provides a listing of the proposed permitted uses for the 901 Mack Todd Road PD Development. This listing allows the development to fulfill the intent of the commitment to a mix of residential uses. Uses are subject to general and specific regulations of the Town of Zebulon UDO.

**Table 1**

PERMITTED USES TABLE	
	P = Permitted Use
USE TYPE	
Residential Uses	
Single Family Attached and permitted accessory uses	P

**Section 6: Design Controls**

**Residential – 2.30 acres**

**Density**

Density: 5.65 dwelling units per acre max (overall)

Units: 13 dwelling units max  
All units shall be Single Family Attached.

**Building Height**

Maximum Height / # of Stories: 35 ft. / 3 Stories

**Building Setbacks** (see below)

Front:	5 ft. min. for lots 10-13 7.5' min. for lots 1-9
Side:	5 ft. min.
Rear:	10 ft. min.

Note: All single family attached units shall be rear loaded.

**Buffers (Refer to PD Map)**

**Streetscape Buffers:**

Mack Todd Road

None proposed in front of units; foundation plants along the front façade of the units that front on Mack Todd Road in lieu of a streetscape buffer.

A modified 15' Type C buffer shall be provided along the frontage that does not contain residential units.

**Perimeter Buffers:**

Adjacent to the adjoining lots

Type A buffer along PIN 1795-82-9159 where single family attached units are located adjacent to the shared property line as shown on concept plan.

All streetscape and perimeter buffers shall be provided in accordance with the Town of Zebulon UDO

## Section 7: Architectural Standards

### Standard Rezoning Conditions

The style of buildings will be any variety of the following: Craftsman, Traditional, Colonial, Neoclassical. the intent is to foster multiple styles to create a community that is not monotonous.

All residential structures shall have three (3) or more of the following features:

- Front Porch
- Awnings
- Columns
- Balconies
- Broken Roof Lines
- Dormer
- Arched Architectural Features
- Chimney
- All Brick -or All Stone Façade
- Other architectural features approved by the Planning Director

All residential structures shall have at least four (4) of the following features:

- Decorative Shake
- Decorative Porch Railings/Posts
- Shutters
- Decorative/Functional Air Vents on Roof or Foundation
- Trimmed Windows or Recessed Windows
- Decorative/Period Windows
- Decorative Brick or Stone (10% min. required on the front elevation)
- Decorative Gables
- Decorative Cornices
- Tin/Metal Roof
- Other decorative features approved by the Planning Director.

Roofs:

Roof lines shall be varied to reduce the scale of the structure and add visual interest. Rood shapes (for example: flat, hip, mansard, gable, or shed) and material shall be architecturally compatible with façade elements and the rest of the structures. Shed roofs may be used on porches and dormers.

## Facades:

- The principal structure's front façade must incorporate recesses and projections along at least 50% of the length of the façade. Windows, awnings, and porch area shall total at least 50% of the façade length abutting a public street.
- Façades shall incorporate a repeating pattern of change in color, texture, and material modules.
- Façade renovations shall incorporate original building details to the maximum extent practicable.
- If roof cornices have been removed or damaged on an existing structure, renovations of that structure must include retaining, repairing, and replacing the roof cornices.

## Entryways:

- Doors shall have built-in windows; alternatively, a solid door is allowed provided side lights (side windows) are installed immediately adjacent to the solid door.
- Variations in color schemes and textures are encouraged in order to articulate entryways so as to give greater recognition to these features.

## Materials and Color Palette:

- Predominant exterior building materials shall be high quality materials, including brick, wood, stone, fiber cement, and/or wood composite. Vinyl siding is not permitted; however, vinyl windows, decorative elements and trim are permitted.
- Front and side porches with open foundations shall have brick or stone piers and openings shall be fully screened with evergreen plantings.
- A varied color palette shall be utilized on homes throughout the subdivision and shall include siding, trim, shutter, and accent colors complementing the siding colors.

## Single-family Attached (Townhomes) - Specific Requirements:

1. Each house will have a min. of 2 stories and a maximum of 3 stories.
2. Min. dwelling size shall be 1,200 s.f.
3. All townhomes may have a raised slab foundation or crawl space.
4. Garage doors must have windows, decorative details or carriage-style adornments.
5. The front elevation of each single family attached unit shall contain a min. of 10% masonry (brick or stone) and shall contain a min. of two siding materials (i.e. stone and hardiplank; brick and shake). No two



consecutive units within a single building shall contain the exact same front elevation with regard to materials or color palette.

6. All sides of a principal structure that face an abutting public street shall have architectural and decorative features as described above.
7. A mail kiosk shall be located internal to the development as shown on the conceptual plan. If a kiosk shelter is incorporated it shall be designed with similar architectural style, materials, and color palette as the homes in the neighborhood. The kiosk shelter may be partially enclosed or open on all 4 sides.

We commit to exceed the architectural requirements in Section 5.2.4 of the UDO.

## **Section 8: Parking and Loading**

All parking and loading areas shall comply with all applicable requirements of the Town of Zebulon UDO Section 5.8. Electric vehicle (EV) charging stations shall be provided for two of the parking spaces.

## **Section 9: Signs**

All signage shall comply with applicable standards and requirements of the Town of Zebulon UDO Section 5.11.

## **Section 10: Public Facilities**

### Water and Sanitary Sewer:

All lots shall be served by City of Raleigh water and sanitary sewer.

### Streets:

No streets being proposed internal to the development.

Mack Todd Road - dedicate 5' of right of way. Build  $\frac{1}{2}$  of the ultimate 70' Right-of-Way section less median. Provide a fee in lieu for  $\frac{1}{2}$  of the 12' wide median. Roadway section will include 5' wide sidewalk for the full length of property.

### Sidewalks:

A 5' wide sidewalk shall be provided along the frontage of 901 Mack Todd Road.

### Alleys:

All residential alleys shall be public and shall be a 26' asphalt pavement within a 30' wide Town of Zebulon Alley Right of Way. Alleys shall be maintained by the HOA.

### Greenway Trails:

Developer shall provide easement for and construct the section of the Corridor 8 greenway that runs along the east side of the development.

## **Section 11: Natural Resource and Environmental Data**

### Existing Vegetation:

This development site consists of wooded forests and scrubby undergrowth. Wooded areas differ from dense hardwood forested areas to softwood pine stands typical of the region and is mainly located within the extents of the stream buffer along the east side of the site. The area of scrubby undergrowth is situated where site development will take place.

Existing streams with designated and delineated buffers protected by and in accordance with the Town of Zebulon UDO and NCDWR Regulations. Any and all impacts requiring permits shall be obtained and permitted thru the Town of Zebulon, NCDWR. and the US Army Corps of Engineers where applicable.

This site is within the Neuse River Basin.

No portion of this site are located within Special Flood Hazard areas defined by FEMA FIRM Map 3720179500K dated July 19, 2022.

### Historic Structures and Significance:

This site does not contain any historic structures or contains any historical significance.

## **Section 12: Stormwater Management**

901 Mack Todd Road will meet all applicable requirements and standards as described in the Town of Zebulon Street and Storm Drainage Standard and Specifications Manual. This project will meet all stormwater reduction requirements including limiting the post-development stormwater flows to not exceed the pre-development stormwater runoff.

The 901 Mack Todd Road Development will use approved devices to control the stormwater and sediment runoff. These devices may include detention ponds, retention ponds, bio-retention areas or any other approved BMP stormwater control. Stormwater control devices shall be landscaped and constructed to be an amenity to the development and shall blend into the surroundings.

A fountain will be provided in the SCM.

## **Section 13: Parks and Recreation**

50% of our open space shall be urban open space per UDO Sec. 5.7.4.

The following list of amenities shall be included in the urban open space area as noted on the concept plan:

### Open Space #1:

- Pocket Park (5,000 s.f.)
- Outdoor Grill
- Two Picnic Tables
- Pollinator Garden (min. 225 s.f.)

### Open Space #2:

- Community Garden (with storage shed)

### Open Space #3:

- Dog Park: Min. 1,500 s.f. of fenced area; shall include a min. of one benches, one trash can, one dog waste station, and one drinking

fountain with dog fountain. Dog park fence shall be a min. of 4' tall chain link fence – either galvanized or vinyl-coated.

Design of these areas will be done at site plan.

In addition to the amenities in the open space area the following amenities shall be provided:

- A private connection to the Corridor 8 greenway trail shall be provided. Exact location to be determined at site plan.
- An artist designed bicycle rack shall be provided adjacent to the mail kiosk.
- Outdoor display of public art (TBD) to be located adjacent to guest parking.
- Pollinator Garden. Exact location to be determined at site plan.

Developer shall provide easement for and construct the section of the Corridor 8 greenway that runs along the east side of the development.

## **Section 14: Consistency with Comprehensive Plan and Land Use Map**

901 Mack Todd Road is consistent with the Town of Zebulon Comprehensive Plan and Land Use Map goals and objectives.

1. This development proposes single family attached residential development, which supports the desire for a variety of housing types and price points within the Town limits. This will help to draw new residents to the Town as well as keep existing residents within Town limits when looking to move.

2. This development proposes a higher density residential development that is nestled around the environmentally sensitive areas located on this site. This helps to buffer our development from adjacent development that is not as dense as our proposal.

3. This development will assist in the expansion of the sidewalk and greenway network in the Town.

In summary, this development proposal is consistent with the goals and objectives of the Town of Zebulon Comprehensive Plan.

While this development is not consistent with the Future Land Use Map, this parcel is not suited to light industrial development due to its size, shape, and the presence of environmentally sensitive areas. Given the proximity to Downtown Zebulon, this site is suited better towards a small residential infill development.

### **Section 15: Compliance with the UDO**

The Project will comply with all other relevant portions of the Town of Zebulon Unified Development Ordinance.

### **Section 16: Features of Development Included per the Utility Allocation Policy**

Points Required: 60

<u>Point Item</u>	<u>Point Value</u>	<u>Location (if known)</u>
Base Points	20	
EV Charging Station (two-port)	5	Guest Parking
Fountain/Stormwater Amenity in SCM	4	SCM
Compliance with UDO Sec. 5.2	10	Building Design
Outdoor Display of Public Art	4	TBD at Site Plan
Pollinator Garden (225 sf. Min)	3	Open Space #1
Enhanced Buffer Landscaping	2	Next to Lots 1 & 13
Installation of Native Shade Trees	1	In Type A Buffer
Outdoor Kitchen or Grill	2	Open Space #1
Pocket Park (5,000 sf. Min.)	3	Open Space #1
Community Garden (15' x 15' with water access & potting shed)	3	Open Space #2
Drinking Fountain with Pet Fountain	2	Open Space #3
Artist-Designed Bicycle Rack	1	Next to Mail Kiosk
<b>TOTAL</b>	<b>60</b>	

## Section 17: Zoning Conditions

The following zoning conditions are being offered for consideration:

- 1) Uses shall be limited to single family detached, single family attached, and permitted accessory uses.
- 2) Minimum single family attached unit shall be a minimum of 1,200 s.f..
- 3) Minimum driveway stem length shall be 20'.
- 4) Mack Todd Road - dedicate 5' of right of way. Build  $\frac{1}{2}$  of the ultimate 70' Right-of-Way section. Roadway section will include 5' wide sidewalk for the full length of property.
- 5) Provide a 10' wide Type A buffer along PIN 1795-82-9159 where single family attached units are located adjacent to the shared property line as shown on concept plan.
- 6) Provide foundation plants along the front façade of the units that front on Mack Todd Road in lieu of a streetscape buffer. A minimum of the following shall be planted: 3 evergreen shrubs (12" height @ installation) per unit and shall be a plant than can be maintained at 18" height where located in the sight triangle. Plant selection to be determined at site plan. See detail on L-2 for typical example of foundation landscaping.
- 7) Slab foundation shall be permitted.
- 8) Vinyl siding shall not be permitted but vinyl accents, such as windows, decorative trim, and other elements shall be permitted.
- 9) Developer shall provide easement for and construct the section of the Corridor 8 greenway that runs along the east side of the development.
- 10) Native trees shall be used for any street tree or buffer planting.
- 11) 50% of the required open space shall be dedicated to urban open space.

*Planned Development for 901 Mack Todd Road Zebulon, NC with Pin# 1795827060 is approved.*

*This the 5<sup>th</sup> day of August, 2024.*

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*Glenn L. York - Mayor*

**SEAL**

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*Lisa M. Markland, CMC - Town Clerk*

**Topic:** Gill St Park- DEQ Authorization  
**Speaker:** Sheila Long, Parks & Recreation Director  
Grady Shields, Attorney  
**From:** Sheila Long, Parks & Recreation Director  
Grady Shields, Attorney  
**Approved by:** Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

The Board of Commissioners will consider authorizing staff to engage the Department of Environmental Quality to enter the Pre-regulatory Landfill Program and execute any required agreements.

**Background:**

The Town has been considering the construction of various improvements at Gill Street Park. The NC Department of Environmental Quality ("DEQ") has classified the Park as a Pre-Regulatory Landfill site, subject to regulation under DEQ's Pre-Regulatory Landfill Program ("Program"). Given the Park's historic use as a landfill, Parks and Rec elected to have a subsurface soil assessment done in the areas most likely to be disturbed during construction.

Staff worked with Wyrick Robbins to contract with Mid-Atlantic Associates, Inc. ("Mid-Atlantic"), for Mid-Atlantic to conduct the needed subsurface soil sampling. Subsurface and surface samples showed lead contamination at levels in excess of the DEQ's standards. Interim measures have been taken by staff to limit access to areas with elevated lead levels. Mid-Atlantic summarized its subsurface and surface sampling results in a May 29, 2024 report. The Board of Commissioners was provided the report on May 30<sup>th</sup>, 2024. Mid-Atlantic's report was submitted to DEQ. DEQ responded offering to complete an additional, more thorough investigation at the Park. More detailed information regarding the Program, the Program's offer and the likely timelines associated with the Program's proposed work is attached for review.

**Discussion:**

The Board of Commissioners will consider authorizing staff to engage the Department of Environmental Quality to enter the Pre-regulatory Landfill Program and execute any required agreements.

**Fiscal Analysis:**

Additional investigation would be at the expense of DEQ and on their timeline. If the results of DEQ's investigation suggests that additional remediation is required, the program would re-prioritize the Park site based on the results of the investigation. Any remediation work would be at the Program's expense. The Town would have the option of completing the remediation itself if the Town decided that it could not wait for the Program to complete the remediation; in that case, the remediation would be at the Town's expense, unless the Program agreed that the work was needed to address an "imminent hazard."

**Attachments:**

1. Pre-Regulatory Landfill Program Invitation Attorney Report



## Mid-Atlantic Soil Test Results and Pre-Regulatory

### Landfill Program Invitation

June 19, 2024

Gill Street Park

#### Overall Summary

The Town, through its Parks and Recreation Department, has been considering the construction of various improvements at Gill Street Park ("Park"). The NC Department of Environmental Quality ("DEQ") has classified the Park as a Pre-Regulatory Landfill site, subject to regulation under DEQ's Pre-Regulatory Landfill Program ("Program"). Given the Park's historic use as a landfill, Parks and Rec elected to have a subsurface soil assessment done in the areas most likely to be disturbed during construction.

In February, 2024, Wyrick Robbins contracted with Mid-Atlantic Associates, Inc. ("Mid-Atlantic"), for Mid-Atlantic to conduct the needed subsurface soil sampling. Because certain of the subsurface samples showed lead contamination at levels in excess of the DEQ's standards, the Town then had Mid-Atlantic sample the surface soils at the Park. Certain of these surface samples also showed the presence of lead at levels in excess of the DEQ's standards. Mid-Atlantic summarized its subsurface and surface sampling results in a May 29, 2024 report, and more detailed information regarding the sampling results and the interim measures taken by Staff is provided below.

Mid-Atlantic's report was submitted to the Program on May 31, 2024. By an email dated June 3, 2024, the Program responded to Staff offering to complete an additional, more thorough investigation at the Park. More detailed information regarding the Program, the Program's offer and the likely timelines associated with the Program's proposed work is provided below. Staff is recommending that the Board accept the Program's offer to conduct a more thorough investigation, which investigation would be done at the Program's expense.

#### Soil Sample Results

On March 1, 2024, Mid-Atlantic sampled thirty-five (35) borings from seven (7) quadrants at a level of one foot (1') below the surface within the Park. One (1) subsurface sample was taken from outside the Park boundary to define background conditions. Mid-Atlantic reported to Wyrick Robbins the results of its tests for (i) RCRA metals, (ii) volatile organic compounds ("VOCs"), and (iii) semi-VOCs ("SVOCs"). Three (3) test samples detected levels of lead higher than DEQ's Preliminary Soil Remediation Goals ("PSRGs") established for residential use, which are typically applied to public parks. Other metals and one SVOC were detected at levels higher than the residential PSRGs, but not at concentrations that resulted in an "unacceptable risk" of exposure. No volatile organic compounds were detected higher than their Residential PSRGs.

On April 15, 2024 Mid-Atlantic followed its initial subsurface sampling with surficial screening using an X-Ray Fluorescence ("XRF") analyzer paired with laboratory analysis of soil from selected locations to verify the screening results. Eighteen (18) of the sixty-seven (67) field screening locations exhibited lead at concentrations above its Residential PSRGs. Mid-Atlantic then took soil samples from these eighteen (18) locations, and from an additional seven (7) locations that were close to the Residential PSRGs, for laboratory confirmation analysis for lead from the upper inch of the soil profile. Of the twenty-five (25) soil samples taken, fourteen (14) showed lead levels above the 200mg/kg Residential PSRG for

lead. Additional detail on Mid-Atlantic's sampling methodologies and results is provided in Mid-Atlantic's May 29, 2024 report.

#### Interim Mitigation Measures

Immediately upon learning of the results of Mid-Atlantic's surface soil sampling, Staff took action to mitigate public exposure to the contamination by restricting access to the areas of the Park where the lead impacts to the soil had been identified, and added additional layers of mulch to limit the potential for public contact with the soils. Staff is currently continuing to maintain the barriers preventing access to certain areas within the Park, at Mid-Atlantic's recommendation. Subject to the Board's decision with respect to the Program's offer to complete an additional, more thorough investigation, Staff intends to continue coordinating with Mid-Atlantic as the Town proceeds with construction in the Park, to address any issues that may arise with respect to the excavation, removal or disposal of the impacted soils and to provide for appropriate, more permanent mitigation measures.

#### Pre-regulatory Landfill Program and the Program's Offer

DEQ manages the Pre-regulatory Landfill Program ("Program") to address landfills that received municipal solid waste prior to January 1, 1983, but not thereafter. The Program identifies pre-regulatory landfills, assesses the risk of contamination, prescribes assessment and remedial action and funds the cost of any assessment and remediation. The Program, at its cost, may initiate remedial action independently of the Town if action is justified by the DEQ's Risk Score for the site.

A town may delegate assessment and remediation obligations to the Program. If the Program assumes responsibility for assessment and remediation, it does so based on a risk assessment that prioritizes work based on the severity of the risk posed to the public. Mid-Atlantic had previously contacted DEQ and determined that the risk score was low compared to other sites, and that the Program was unlikely to take action to remediate the Park.

As noted above, after receiving Mid-Atlantic's May 29, 2024 report, the Program contacted Staff offering to undertake an additional environmental investigation at the Park. At Staff's request, Mid-Atlantic contacted the Program seeking additional information regarding the Program's offer. Mid-Atlantic's understanding is that the Program would prefer to do a more thorough investigation of the park site than Mid-Atlantic's more limited soil investigation. The Program would, then, re-prioritize the site based on the results of that more thorough investigation. The Program's more thorough investigation would likely include an assessment of the soil cover, gauging the potential impacts to sensitive receptors off-site, like wells and surface water features, and a more thorough delineation of the extent of the contamination, both horizontally and vertically. Mid-Atlantic's experience in Durham was that it took about four (4) months for the Program to get started on its investigation, after the submission of Mid-Atlantic's reports. Once the Program began its investigation, Mid-Atlantic's experience in Durham was that it took the Program four (4) or five (5) months to complete its investigation. The investigation would be at the Program's expense, and the Town would only need to agree to provide the Program and its contractors with access to the Park. The field work associated with the Program's investigation would take only a few days at a time and involve the use of hand augers and geophysical equipment, instead of the use of heavy equipment or drilling rigs. Accordingly, Mid-Atlantic does not anticipate that the public access to the Park would be significantly impacted by the Program's investigation, beyond the impact caused by the existing barriers.

If the results of the investigation suggested that additional remediation was required, the program would re-prioritize the Park site based on the results of the investigation. Here, Mid-Atlantic's estimate is that the Town would be looking at "months to years" for the Program to work its way down

its priority list and get to the Park, then design the work, get contractors to bid on the work, and then compare the bids. Any remediation work would be at the Program's expense. The Town would have the option of completing the remediation itself if the Town decided that it could not wait for the Program to complete the remediation; in that case, the remediation would be at the Town's expense, unless the Program agreed that the work was needed to address an "imminent hazard." Mid-Atlantic's experience has been that it would likely take the Program about another year to complete the actual remediation, once the Program and its contractors got started on the work.

#### Staff Recommendation

Given that the Program's proposed additional investigation would be more thorough than Mid-Atlantic's investigation and would be at the Program's expense, and given that the Program's additional investigation should only result in minimal additional impacts to the public's access to the Park, Staff is recommending that the Board authorize the acceptance of the Program's offer. Once the Program has completed its investigation, the Town will be able to make a more informed decision with respect to whether to have the Program complete additional remediation at the Park, given the likely timeframes involved and the Town's plans for improvements to the Park.

**Topic:** Interim Town Manager Reimbursement  
**Speaker:** Bobby Fitts, Finance Director  
**From:** Bobby Fitts, Finance Director  
**Prepared by:** Bobby Fitts, Finance Director  
**Approved by:** Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

Consideration of approval of reimbursement of lodging expenses for Interim Town Manager.

**Background:**

Interim Town Manager Taiwo Jaiyeoba entered into a contract with the Town of Zebulon to be Interim Town Manager on June 4, 2024. In this contract, it stated rate of pay, reimbursement of expenses such as mileage, meals and lodging. For the lodging, it was stated that the amount was to be a reasonable amount.

**Discussion:**

Staff is seeking clarification on what is reasonable and approval on the initial reimbursement of the Interim Town Manager's lodging expenses incurred from June 10 – July 9.

**Fiscal Analysis:**

Board approval of lodging reimbursement is necessary to complete reimbursement to interim manager.

**Policy Analysis:**

N/A

**Staff Recommendation:**

Staff recommends clarification of reasonable lodging expenses and approval of lodging reimbursement.

**Attachments:**

1. None

**Topic: FY 2024 Monthly Financial Statement Update**

Speaker: Bobby Fitts, Finance Director (if pulled from Consent)  
Prepared by: Bobby Fitts, Finance Director  
Approved by: Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

A monthly report summarizing the status of the Town's revenues and expenditures.

**Background:**

The attached financials are a summary of revenues and expenditures to date and an observation of trends throughout the year. The enclosed statements are through July 19, 2024, and reflect Fiscal Year 2024 (sharing Fiscal Year '25 reports will begin with September's Regular Meeting).

**Information:**

FY '24 Expenditures

The Town has spent approximately 63% (~ \$18,784,000) of its General Fund budget of \$29,852,743. Departments with lower percentage expenditures reflect expensive capital projects in process (unspent funds supporting these projects are rolled forward to FY '25).

FY '24 Revenues

- Property Tax (the Town's largest revenue stream)
  - + FY 2024 collections: \$10,294,355 collected to date (~ 96% of budget).
  - + Observations:
    - # 1.85% more than collected last fiscal year (\$187,766).
    - # All twelve months of vehicle tax have been collected for FY 2024.
- Sales Tax (second largest revenue stream)
  - + March & April's sales (reports lag 3-months):
    - # \$32,746 (8.4%) more collected than last March & April for all sales tax.
    - # \$16,213 (9.5%) more collected than last March & April for "local" sales tax.
    - # "Local" sales tax (Article 39) is generated within, and returns to, Wake County.
    - # For every \$100,000 in local sales, \$3.68 comes back to the Town of Zebulon.
  - + Year-to-Date comparisons (sales through the first ten months of the fiscal year)
    - # \$148,952 (+7.7%) more collected than at this time last year for all sales tax
    - # Collections represent 83% of budgeted revenues at 83% of the fiscal year.
- Utilities Sales Tax: (5% of revenue stream) Third quarter distribution
  - + \$52,152 (27.5%) collected over FY 2023 actual for same quarter
  - + Reflects natural gas and electricity sales and heavily weather dependent
- Permits & Zoning (Development growth indicator)
  - + \$304,293 collected total (121% of budgeted revenues (\$250,000))
  - + 15% more than what was collected this time last fiscal year (\$265,048).

- Parks & Recreation (Service and programming growth indicator)
  - + \$197,549 collected total (162% of budgeted revenues (\$122,000))
  - + 12.1% more than what was collected last fiscal year (\$176,270).
  
- Transportation Impact Fees (Development growth indicator)
  - + \$494,806 collected to date.
  - + 34.0% less than what was collected last fiscal year.
  - + Revenue placed in reserve for transportation projects to be spent within 10 years
  
- Recreation Impact Fees (Development growth indicator)
  - + \$1,254,000 collected in FY 2024.
  - + 47.5% less than what was collected in FY 2023 (\$2,388,000).
  - + Collections since inception of fee (January 2022) ~ \$4,985,000
  - + Revenue is reserved for growth-related projects (e.g. new parks or expansions)

**Policy Analysis: N/A**

**Financial Analysis:** Budgeted revenue in FY 2024 was \$29,852,743 while year to date revenue collected was \$22,360,462 (75% of budgeted). Budgeted revenue includes \$8.8M Fund Balance. Excluding Fund Balance, revenue collections will exceed budgeted revenues.

**Staff Recommendation:**

No staff recommendation or Board action is necessary. These are informational only.

**Attachments:**

1. General Fund Fiscal Year 2024 Expenditure Statement and Revenue Statement (as of July 19, 2024)
2. Sales Tax – FY 2024

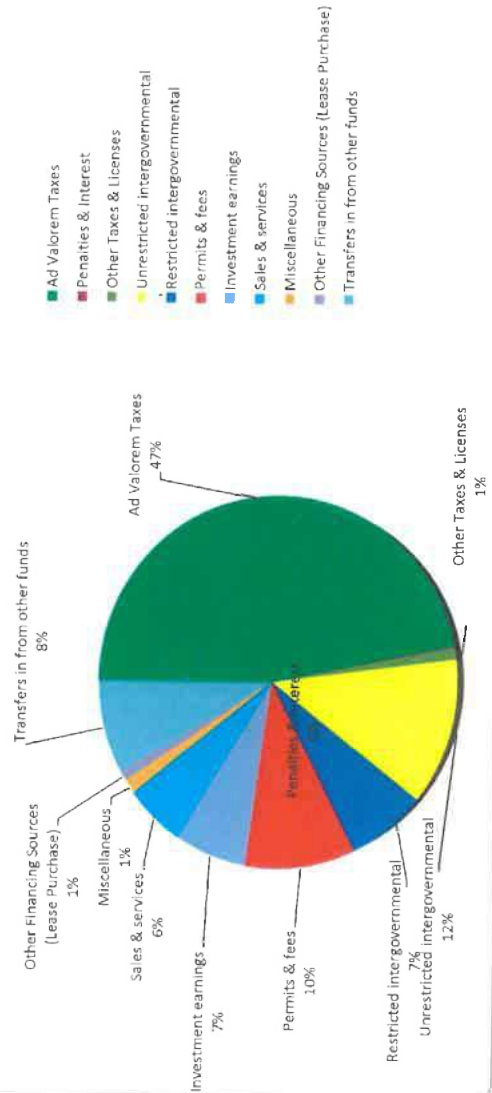


TOWN OF ZEBULON  
 Revenue Statement: 2023 - 2024  
 for Accounting Period 6/30/2024  
 GENERAL FUND

As of 7/19/2024

Revenue Categories	Estimated Revenue	Revenue YTD	% Collected	% of Total Revenue YTD
Ad Valorem Taxes	\$10,722,500	\$10,468,660	97.6%	46.8%
Penalties & Interest	\$15,000	\$30,615	204.1%	0.1%
Other Taxes & Licenses	\$185,500	\$219,819	118.5%	1.0%
Unrestricted intergovernmental	\$3,233,000	\$2,782,656	86.1%	12.4%
Restricted intergovernmental	\$2,512,000	\$1,544,055	61.5%	6.9%
Permits & fees	\$797,750	\$2,207,539	276.7%	9.9%
Investment earnings	\$300,000	\$1,468,029	489.3%	6.6%
Sales & services	\$1,027,175	\$1,257,574	122.4%	5.6%
Miscellaneous	\$100,089	\$280,783	280.5%	1.3%
Other Financing Sources (Lease Purchase)	\$232,000	\$215,000	92.7%	1.0%
Transfers in from other funds	\$1,885,733	\$1,885,733	100.0%	8.4%
Fund Balance Appropriated	\$8,841,996	\$0	0.0%	0.0%
<b>Total Revenues</b>	<b>\$29,852,743</b>	<b>\$22,360,462</b>	<b>74.9%</b>	<b>100%</b>

Town of Zebulon General Fund % of Total Revenue To Date - FY 2024



# ZEBULON

NORTH CAROLINA

## TOWN OF ZEBULON

Expenditure Statement: 2023 - 2024  
for Accounting Period 6/30/2024

As of 7/19/2024

### GENERAL FUND

<u>Dept #</u>	<u>Department</u>	<u>Approp Amount</u>	<u>Expenditure YTD</u>	<u>% Exp.</u>
410	GOVERNING BODY	\$776,116	\$526,925	67.9%
420	FINANCE	\$517,155	\$517,008	100.0%
430	ADMINISTRATION	\$1,600,725	\$1,139,983	71.2%
490	PLANNING AND ZONING	\$825,330	\$694,332	84.1%
500	PUBLIC WORKS-PROPERTY & PROJECT MGMT	\$2,881,930	\$1,804,653	62.6%
510	POLICE	\$3,989,940	\$3,690,273	92.5%
520	PUBLIC WORKS-OPERATIONS	\$11,225,660	\$4,756,945	42.4%
530	FIRE	\$3,956,504	\$3,148,053	79.6%
570	POWELL BILL	\$232,686	\$207,623	89.2%
590	ENGINEERING	\$165,000	\$64,695	39.2%
620	PARKS & RECREATION	\$2,064,097	\$1,625,627	78.8%
690	COMMUNITY & ECONOMIC DEVELOPMENT	\$1,617,600	\$607,472	37.6%
<b>Total Expenditures</b>		<b>\$29,852,743</b>	<b>\$18,783,589</b>	<b>62.9%</b>



**Sales Tax**

**FY 2024**

Month	Article 39 (1) *	Article 40 (1/2)	Article 42 (1/2)	Article 44 (1/2)	City Hold Harmless	FY 24 Totals	Prior Year (FY 2023)	% Inc (Dec) from Prior Yr
July	\$ 89,122	\$ 38,656	\$ 44,762	(0)	\$ 32,237	\$ 204,776	\$ 187,311	9.3%
August	93,423	40,589	46,952	0	34,081	215,045	203,381	5.7%
September	89,799	37,462	45,030	0	29,862	202,153	202,821	-0.3%
October	92,175	37,812	46,268	(3)	30,232	206,484	197,664	4.5%
November	99,162	39,407	49,722	2	30,628	218,921	188,169	16.3%
December	105,355	44,069	52,957	(1)	35,438	237,799	225,394	5.5%
January	81,953	34,721	41,092	(2)	28,462	186,226	187,935	-0.9%
February	80,960	33,635	40,575	(1)	26,918	182,092	144,614	25.9%
March	100,097	41,113	50,238	0	32,572	223,970	217,514	5.4%
April	86,723	37,296	43,546	(6)	30,856	198,414	177,123	12.0%
May							207,702	-100.0%
June							216,208	-100.0%
<b>Total</b>	\$ 918,748	\$ 384,760	\$ 461,145	(10)	\$ 311,236	\$ 2,075,878	\$ 1,926,926	7.7%

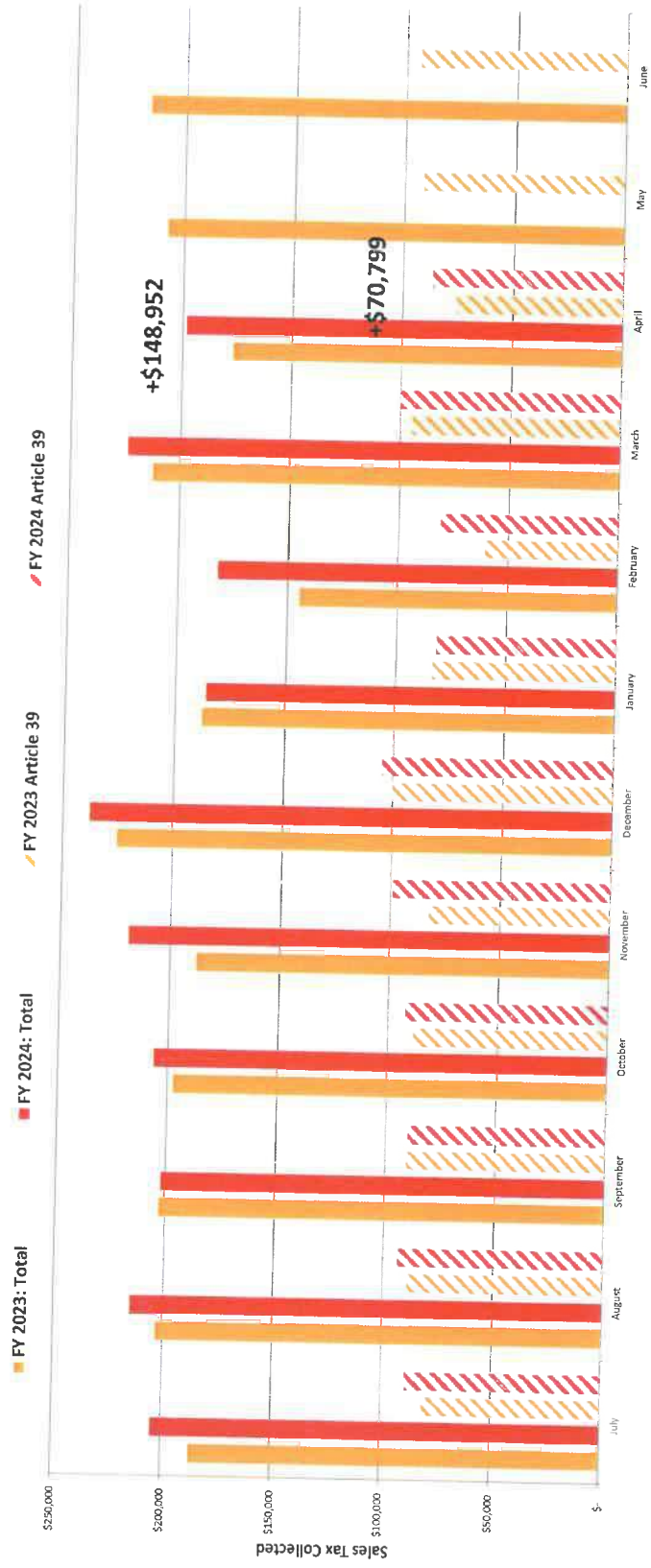
**Sales Tax**

**FY 2023**

Month	Article 39 (1) *	Article 40 (1/2)	Article 42 (1/2)	Article 44 (1/2)	City Hold Harmless	FY 23 Totals	Prior Year (FY 2022)	% Inc (Dec) from Prior Yr
July	\$ 81,324	\$ 35,456	\$ 40,808	(1)	\$ 29,723	\$ 187,311	\$ 125,560	49.2%
August	89,152	37,948	44,690	1	31,591	203,381	162,100	25.5%
September	90,401	37,188	45,331	(9)	29,910	202,821	167,034	21.4%
October	88,724	35,842	44,468	(2)	28,631	197,664	167,586	17.9%
November	82,782	35,160	41,563	1	28,664	188,169	169,657	10.9%
December	100,596	41,335	50,512	0	32,950	225,394	201,425	11.9%
January	83,332	34,713	41,782	0	28,106	187,935	140,273	34.0%
February	61,030	28,403	30,601	(6)	24,586	144,614	148,707	-2.8%
March	94,803	38,927	47,461	9	31,315	212,514	181,841	16.9%
April	75,803	34,729	38,068	(10)	29,033	177,123	186,154	-4.9%
May	91,708	38,501	45,971	0	31,521	207,702	180,133	15.3%
June	93,849	40,893	47,128	10	34,329	216,208	195,892	10.4%
<b>Total</b>	\$ 1,033,506	\$ 438,596	\$ 518,383	(6)	\$ 360,358	\$ 2,350,837	\$ 2,026,362	16.0%

\* Net proceeds of the Article 39 tax are returned to the county of origin.

# Monthly Summary of Sales Tax Collected



MANAGER'S REPORT  
AUGUST 5, 2024

**Topic: Interim Manager's Report**

Speaker: Taiwo Jaiyeoba, Interim Town Manager  
From: Taiwo Jaiyeoba, Interim Town Manager  
Prepared by: Taiwo Jaiyeoba, Interim Town Manager

**Executive Summary:**

Update the Board on key items.

**Background:**

The Board of Commissioners have expressed a desire to be updated on the following:

- Town Manager Recruitment (Polihire)
- End of Year Parade (Chris Ray)
- Bond Referendum (Chris Ray)
- ACFR Award Received (Tai Jaiyeoba)
- HR Update (Lisa Markland)
  - o IT Director Recruitment
  - o Assistant Town Manager
  - o Planning Director Recruitment

**Discussion:**

Staff/Consultant will present updates to the Board on these various items.

**Policy Analysis:**

None.

**Fiscal Analysis:**

None.

**Staff Recommendation:**

None.

**Attachments:**

1. Polihire Memo



**RECRUITMENT UPDATE**  
**July 30, 2024**

***Town Manager - Zebulon, NC***

**Candidate Identification:** We have received a total of eight applications from potential candidates. We are working with several organizations to help us identify more potential candidates. While we are not placing advertisements with each of these organizations, our strategy is to network with each of their membership. Some of the organizations we are working with include:

- International City Manager Association (ICMA)
- National Association of Counties (NACO)
- National League of Cities (NLC)
- North Carolina League of Municipalities (NCLM)
- National Forum for Black Public Administrators (NFBPA)
- Local Government Hispanic Association (LGHA)
- Asian American Government Executive Network (AAGEN)
- POLIHIRE Website
- LinkedIn Promoted Posting

**Proposal and Contract:** In mid-June 2024, PoliHire submitted a proposal to the Town of Zebulon to lead the search for the next Town Manager. The contract was awarded at the end of June.

**Kickoff Meeting:** Following the contract execution, PoliHire participated in a kickoff meeting with the Interim Town Manager and the Human Resources Director.

**Stakeholder Engagement:** PoliHire conducted individual meetings with key community members to gather insights into the needs of the Town and the desired qualifications of the next Town Manager. PoliHire met with the Mayor, five Commissioners, and nine Department Directors. The Directors were from the following departments: Communications, Community and Economic Development, Finance, Fire, Human Resources, Parks and Recreation, Planning, Police, and Public Works.

**Development of Recruitment Materials:** PoliHire created a four-page recruitment brochure that serves as the position profile and marketing document. The brochure was approved for posting on July 11, 2024.

**Next Steps:**

- PoliHire is scheduled to meet with the Wake County Manager.

- Kenyatta Uzzell, Founder and CEO of PoliHire will attend the next Commissioner meeting, scheduled for August 5, 2024.
- PoliHire will provide the next recruitment update on August 13, 2024.
- PoliHire plans to present candidates by the end of August 2024.