



**TOWN OF WEDDINGTON  
REGULAR TOWN COUNCIL MEETING  
MONDAY, DECEMBER 12, 2022 – 7:00 P.M.  
WEDDINGTON TOWN HALL  
1924 WEDDINGTON ROAD WEDDINGTON, NC 28104  
AGENDA**

1. Call to Order
2. Pledge of Allegiance
3. Determination of Quorum
4. Additions, Deletions and/or Adoption of the Agenda
5. Conflict of Interest Statement: *In accordance with the state government ethics act, it is the duty of every Council member to avoid conflicts of interest. Does any Council member have any known conflict of interest with respect to any matters on the agenda? If so, please identify the conflict and refrain from any participation in the matter involved.*
6. Mayor/Councilmember Reports
7. Public Comments
8. Presentation from Union County Sherriff's Office Detective Bureau
9. Public Safety Report
10. Consent Agenda
  - A. Approval of October 12, 2022 Special Town Council Meeting Minutes
  - B. Approval of November 14, 2022 Regular Town Council Meeting Minutes
  - C. Approval of 2023 Town Hall Holiday Schedule
  - D. Approval of Budget Amendment for Fiscal Year 2022-2023 for Trash Service
11. Public Hearing
  - A. An Ordinance to amend Section 5-1 of the Charter of the Town of Weddington to change the form of government from Mayor-Council form of government to Council-Manager form of government
12. Old Business
  - A. Discussion and Possible Consideration of Rules for Public Comment and Public Hearings
13. New Business
  - A. Discussion and Possible Consideration of authorizing staff to enter into contract with S&ME for Land Use Plan Study
  - B. Discussion and Consideration of 2023 Regular Town Council Meeting Schedule
14. Updates from Town Planner and Town Administrator
15. Code Enforcement Report
16. Update from Finance Officer and Tax Collector
17. Transportation Report
18. Council Comments
19. Adjournment

## Weddington

# 11/2022

UCR Code	Description	Date of Report	Incident ID	
<b>13A</b>				
13A	ASSAULT INFLICTING SERIOUS BODILY INJURY	11/21/22	202208365	
			Total:	1
<b>13B</b>				
13B	SIMPLE AFFRAY	11/14/22	202208153	
			Total:	1
<b>13C</b>				
13C	COMMUNICATING THREATS	11/18/22	202208270	
			Total:	1
<b>200</b>				
200	ARSON - 2ND DEGREE	11/26/22	202208453	
			Total:	1
<b>220</b>				
220	BREAKING/ENTERING-FELONY	11/20/22	202208317	
			Total:	1
<b>23F</b>				
23F	BEL / THEFT FROM MOTOR VEHICLE	11/3/22	202207891	
23F	BEL / THEFT FROM MOTOR VEHICLE	11/3/22	202207895	
23F	BEL / THEFT FROM MOTOR VEHICLE	11/3/22	202207899	
23F	BEL / THEFT FROM MOTOR VEHICLE	11/12/22	202208125	
			Total:	4
<b>26A</b>				
26A	FRAUD-CREDIT CARD	11/3/22	202207899	
26A	FINANCIAL CARD FRAUD	11/10/22	202208089	
26A	OBTAINING PROPERTY BY FALSE PRETENSES	11/17/22	202208249	
26A	OBTAINING PROPERTY BY FALSE PRETENSES	11/24/22	202208424	
			Total:	4
<b>520</b>				
520	POSSESS WEAPON ON SCHOOL PROPERTY	11/13/22	202208141	
			Total:	1
<b>90I</b>				
90I	RUNAWAY	11/18/22	202208296	
			Total:	1
<b>90J</b>				
90J	TRESPASS - 2ND DEG	11/2/22	202207851	
			Total:	1

## Weddington

# 11/2022

UCR Code	Description	Date of Report	Incident ID	
<b>90Z</b>				
90Z	UNAUTHORIZED USE OF MOTOR VEHICLE	11/22/22	202208389	
			Total:	1
<b>999</b>				
999	ANIMAL CALL BITE	11/1/22	202207813	
999	ANIMAL CALL BITE	11/1/22	202207816	
999	ACCIDENT POSSIBLE INJURY	11/2/22	202207848	
999	ACCIDENT NO VISIBLE INJURY	11/9/22	202208043	
999	ACCIDENT POSSIBLE INJURY	11/9/22	202208045	
999	ANIMAL CALL	11/10/22	202208057	
999	ACCIDENT NO VISIBLE INJURY	11/11/22	202208097	
999	ACCIDENT POSSIBLE INJURY	11/12/22	202208115	
999	ACCIDENT NO VISIBLE INJURY	11/14/22	202208144	
999	ACCIDENT NO VISIBLE INJURY	11/14/22	202208149	
999	ACCIDENT NO VISIBLE INJURY	11/14/22	202208154	
999	ACCIDENT POSSIBLE INJURY	11/14/22	202208157	
999	CALL FOR SERVICE	11/14/22	202208168	
999	ANIMAL CALL	11/15/22	202208173	
999	ACCIDENT NO VISIBLE INJURY	11/15/22	202208184	
999	ACCIDENT NO VISIBLE INJURY	11/17/22	202208233	
999	INVESTIGATION	11/18/22	202208297	
999	ANIMAL CALL	11/19/22	202208310	
999	INVESTIGATION	11/21/22	202208337	
999	INVESTIGATION	11/21/22	202208339	
999	ANIMAL CALL	11/21/22	202208352	
999	CALL FOR SERVICE	11/23/22	202208408	
999	ACCIDENT NO VISIBLE INJURY	11/23/22	202208410	
999	ANIMAL CALL	11/25/22	202208435	
999	ACCIDENT POSSIBLE INJURY	11/28/22	202208477	
999	ACCIDENT NO VISIBLE INJURY	11/28/22	202208478	
999	ACCIDENT NO VISIBLE INJURY	11/29/22	202208510	
			Total:	27

Monthly Crime Total

44

**TOWN OF WEDDINGTON**  
**TOWN COUNCIL WORK SESSION-SPECIAL MEETING**  
**WEDNESDAY, OCTOBER 12, 2022-1:00 P.M.**  
**WEDDINGTON TOWN HALL**  
**MINUTES**  
**PAGE 1 OF 3**

**1. Call to order**

Mayor Horn called the meeting to order at 1:05 p.m.

**2. Determination of Quorum**

Quorum was determined with all Councilmembers present: Mayor Craig Horn, Mayor Pro Tem Janice Propst, Councilmembers Anne Pruitt, Jeff Perryman, and Brannon Howie

Staff present: Leslie Gaylord, Finance Officer; Robert Tefft, Town Planner; Karen Dewey, Town Administrator/Clerk; Karen Wolter, Town Attorney,

Leamon Brice, facilitator

Visitors: Harry Chilcot, Bill Deter, Amy Anthony, Joyce Plyler

**3. Adoption of agenda**

Councilmember Pruitt requested to move item D.2. WCWAA Funding Request/Partnership to the beginning of the agenda as a WCWAA representative (Amy Anthony) is in the audience. Council agreed.

***Motion:*** Mayor Pro Tem Propst made a motion to adopt the agenda as amended.

***Vote:*** The motion passed with a unanimous vote.

**4. Review expectations from Retreat**

Mr. Brice led a Council discussion of the review of expectations from the retreat. Council established areas of improvement opportunities to meet expectations:

- Establish control of meeting environment
- Manage public comments
- Create a statement of public address to the Council-including statement that every citizen has a right to courtesy from the public
- Handle responses to emails-copy all on responses to resident emails to all council members
- Any question about town should be answered by town staff

**5. Discussion of Development of Strategic Plans**

**\*\* A. WCWAA Funding Request/partnership**

Council discussed a partnership agreement with the WCWAA non-profit to assist in funding their lighting project of converting to LED bulbs. Options discussed would be to give an infusion of capital in return for resident use of facilities, possible use of facilities for town sponsored events.



Ms. Wolter suggested a management services agreement with itemization of services provided and paid in an annual amount.

If town is to offer grants, Ms. Wolter recommended doing so with an annual funding period with an application completed with the reason for the request and at the completion, show how the grant was used. This option puts the decision in the council hands on an annual basis. Staff will meet with WCWAA to determine actual amount requested and what benefits to residents can be included.

## **B. Parks and Facilities**

- 1. Pathway to Plaza**
- 2. Landscaping in Plaza**
- 3. Irrigation in Plaza**
- 4. Benches/picnic tables**
- 5. Town Hall improvements**

Council discussed projects for town hall improvement and repair. Staff will move forward with estimates for repairs on front porch, renovations to the garage and a path to the plaza area from Town Hall. Staff will research benches and picnic tables for the plaza area and continue to get estimates for landscaping, including lighting, irrigation, and plantings in Park Plaza area. Inside town hall, staff will upfit council room for streaming capabilities.

## **C. Transportation**

- 1. Local road maintenance**
- 2. Sidewalks**

NCDOT Division 10 has moved the Providence Road and Rea Road Extension projects up. Council discussed requirements for new subdivisions to include sidewalks. Council directed staff to add sidewalk/walkability questions to the LUP survey.

## **D. Administration**

- 1. Title change for tax/finance**
- 2. ~~WCWAA Funding Request/partnership~~**
- 3. Archivist for planning document organization**

Council discussed job title changes for tax collector and finance officer. No action was taken. Staff will move forward to find an archivist for planning document organization.

## **E. Governance**

- 1. Rules of Procedure**

Council discussed amending the Rules of Procedure to incorporate public comment guidelines and a conflict of interest statement. Staff will present a draft Rules of Procedure and public comment/public hearing guidelines to council at the November meeting.

- 2. Charter Change**

Council continued discussion of a charter amendment to change the town form of government from Mayor-Council to Council-Manager. Staff will prepare a resolution of intent for consideration at the November meeting.

### **3. Ordinance Amendments**

Council discussed a short-term rental ordinance. Ms. Wolter recommended creating a category use in the permitted use table in the UDO. Enforcement of a short-term rental ordinance has proven difficult for other municipalities across the state. Ms. Wolter recommended using the problems caused by short term rentals like noise and parking issues as enforcement tools.

#### **F. Services**

##### **1. Solid Waste Ordinance and Fee Ordinance**

Council reviewed the solid waste ordinance and the solid waste fee ordinance. Staff will present the ordinances at the November meeting for consideration.

##### **2. Level of Law Enforcement Support**

Council discussed coverage of law enforcement support. They discussed reviewing the contract with Union County Sherriff's Office and reviewing data on calls between 11:00 p.m. and 5:00 a.m.

#### **G. Events**

##### **1. 40<sup>th</sup> Anniversary Celebration May 2023**

Staff reviewed options for the 40<sup>th</sup> anniversary celebration. Council discussed including former Council, volunteers, and staff.

### **6. Adjournment**

**Motion:** Councilmember Pruitt made a motion to adjourn the October 12, 2022 Town Council Special Meeting work session at 5:20 p.m.

**Vote:** The motion passed with a unanimous vote.

Approved: \_\_\_\_\_

\_\_\_\_\_  
D. Craig Horn, Mayor

\_\_\_\_\_  
Karen Dewey, Town Administrator/Clerk



**TOWN OF WEDDINGTON  
REGULAR TOWN COUNCIL MEETING  
MONDAY, NOVEMBER 14, 2022 – 7:00 P.M.  
WEDDINGTON TOWN HALL  
MINUTES  
PAGE 1 OF 6**

**1. Call to Order**

Mayor Horn called the meeting to order at 7:00 p.m.

**2. Pledge of Allegiance**

Council led the pledge of allegiance

**3. Determination of Quorum**

Quorum was determined with all council present: Mayor Craig Horn, Mayor Pro Tem Janice Propst, Councilmembers Anne Pruitt, Jeff Perryman, and Brannon Howie

Staff present: Town Administrator/Clerk Karen Dewey, Town Planner Robert Tefft, Admin Assistant/Deputy Clerk Debbie Coram, Town Attorney Karen Wolter

Visitors: Gayle Butler, Jack Plyler, Bill Deter, Joyce Plyler, Harry Chilcot, Patricia Hines, Rusty Setzer, Tracy Stone

**4. Additions, Deletions and/or Adoption of the Agenda**

**Motion:** Councilmember Pruitt made a motion to approve the agenda as presented.

**Vote:** The motion passed with a unanimous vote.

**5. Conflict of Interest Statement:** *In accordance with the state government ethics act, it is the duty of every Council member to avoid conflicts of interest. Does any Council member have any known conflict of interest with respect to any matters on the agenda? If so, please identify the conflict and refrain from any participation in the matter involved.*

Mayor Horn read the conflict of interest statement.

No Councilmembers reported a conflict of interest.

**6. Mayor/Councilmember Reports**

Mayor Pro Tem Propst reported that Friday night is the annual tree lighting from 5:30-8:30. Mr. and Mrs. Claus will be there with food trucks, and a DJ.

Councilmember Perryman reported that the November WUMA meeting will be Thursday at 4 p.m. at Marvin Village Hall. The delegates are finalizing things with the extra territorial jurisdiction proposal to the county.

Mayor Horn stated his congratulations to Councilmember Perryman and all veterans. He reported that he was in Washington, D.C. with veterans from World War 2, Korea, Vietnam, and the Middle East conflicts. He will be attending the CRTPO meeting Wednesday and the big discussion topic is the I-77 proposed express/toll lanes. It will be a \$2 billion project from the South Carolina state line to uptown Charlotte. Mayor Horn will be meeting with NCDOT Division 10 Deputy Engineer Bret Canipe. After being asked about the road markings on Weddington Road, Mayor Horn discovered that NCDOT only puts dotted lines at intersections where public roads intersect with public roads. He reported meeting with the Wellington Woods HOA regarding the speeding through the neighborhood. The Charlotte Nativity Festival sponsored by the Church of Jesus Christ of Latter-Day Saints on Hemby Road will be held the first weekend in December.

## **7. Public Comments**

Bill Deter: 401 Havenchase Drive- Mr. Deter spoke on the proposed rules for public hearings and public comments and proposed rules of procedure. He expressed that there have been failed processes and blamed the interim town planner. He stated that more residents have gotten involved because of the failed process and it's time to start working together to build back trust. He discussed the proposed rules for public comments and believes they can be written better to restore faith in the process.

Jack Plyler: 1015 Estate Lane- Mr. Plyler commented on comments made by the previous mayor on the Land Use Plan and rezoning to the Board of County Commissioners. He stated that the Land Use Plan is more than a guide and it may not be an ordinance, but it is always referenced in rezoning for land use consistency.

Joyce Plyler: 1046 Bromley Drive- Ms. Plyler gave a shout out to veterans on Veterans Day and believes everything should be done to honor those who sacrificed to give the right to speak. She commented on the proposed rules of procedure and notices of hearings and meetings. She stated that more effort needs to be made to give residents meeting agendas and documents to better inform them. She would like to see the citations of the General Statutes in the rules of procedure. She stated her belief that polite applause should be allowed.

## **8. Public Safety Report**

Deputy Kropp gave the safety report: there has been an uptick across the county in car break ins. Some cars are unsecured, and some are secured. He reminded residents to lock their cars and not to leave firearms in vehicles. Homeowners can install lighting and cameras to help secure their property. Councilmember Perryman asked if Union County has a notification system for emergencies like an active shooter incident. Deputy Kropp stated that he would look into what the county has.

## **9. Consent Agenda**

### **A. Approval of October 10, 2022 Regular Town Council Meeting Minutes**

### **B. Approval of Proclamation 2022-05 for Small Business Saturday**

**Motion:** Councilmember Perryman made a motion to approve the consent agenda as presented/amended.

**Vote:** The motion passed with a unanimous vote.

## **10. Old Business**

### **A. Discussion and Possible Consideration of Town Council Rules of Procedure**

Councilmember Howie stated that she didn't feel moving from 3 to 4 minutes for hearing comments was necessary.

Ms. Wolter presented a draft rule of procedures that came from the updated 2017 UNC School of Government book that includes statutory changes and is current with new laws.

Councilmember Pruitt stated her agreement with Ms. Plyler to include notating the statutes in the rules.

Mayor Horn commented on Rule 13 that adding agenda items means the public hasn't been notified ahead of time. Ms. Wolter responded that it is within the authority of the council to add items to discuss, but she would advise against adding anything for consideration or approval.

Ms. Wolter recommended making a change to Rule 7. Special Meetings to match the ordinance. The mayor, mayor pro tem, or two councilmembers may call special meetings.

Council directed staff to make the recommended changes, including adding the statutory references to the rules.

### **B. Discussion and Possible Consideration of Rules for Public Hearings and Public Comments**

Councilmember Howie reiterated that she doesn't feel increasing the time for public hearing comments from 3 to 4 minutes to be necessary.

Councilmember Pruitt stated that if the time allotted remains at 3 minutes, more residents can speak in the hour given.

Councilmember Perryman would like to see public comments at 4 minute and limit the total time to an hour and at the discretion of the council, time may be extended.

Councilmember Howie agreed that the time can be extended given the circumstances, but the intent is to limit to an hour.

Mayor Horn agreed but emphasized that the council is elected to listen to the public but should be allowed to exercise judgement. He stressed caution when limiting the time of public hearings and stated that 3 minutes is too short for people to express views succinctly. Mayor Horn asked what the force is of adopting these rules. Ms. Wolter responded that the majority can change them. Adding verbiage to allow for council discretion means the rules can be waived anytime, by majority vote. Ms. Wolter recommended being

consistent with the time limits. Flexibility with the time limits can create a free speech issue. Ms. Plyler mentioned prohibiting applause can be a free speech issue, what is being prohibited here is a demonstrative show of disruption. Polite applause is different from what has been experienced at council meetings. Council agreed to limit public comments to 4 minutes and public hearing comments are limited to 3 minutes. Staff will draft a new rules of procedures with statutory references and include speaking time limits.

## **11. New Business**

### **A. Discussion and Possible Consideration of Chapter 24 - Solid Waste Ordinance**

Council discussed the Solid Waste Ordinance. Ms. Wolter explained that this is the next step in beginning solid waste collection and it is partnered with the Active Waste Contract.

**Motion:** Councilmember Perryman made a motion to approve Chapter 24 - Solid Waste Ordinance.

**Vote:** The motion passed with a unanimous vote.

### **B. Discussion and Possible Consideration of Residential Solid Waste Fee Ordinance**

Council discussed the solid waste fee ordinance. Ms. Wolter changed the date for the ordinance to be effective upon adoption. Ms. Gaylord asked to remove the solid waste fund language in Section 15.

**Motion:** Councilmember Pruitt made a motion to approve the Residential Solid Waste Fee Ordinance with suggested changes.

**Vote:** The motion passed with a unanimous vote.

### **C. Discussion and Possible Consideration of Residential Solid Waste Fee**

Ms. Gaylord presented that the fee was calculated to project out to avoid adjusting every year. Collection will be \$22 per household per month and will be reviewed annually with the budget. Bills for January 2023 through June 2023 will be sent in December and following that, bills will be annual and sent with the tax bill.

**Motion:** Councilmember Perryman made a motion to approve the Residential Solid Waste Fee.

**Vote:** The motion passed with a unanimous vote.

### **D. Discussion and Possible Consideration of Resolution of Intent to Consider an Ordinance Amending the Charter of the Town of Weddington to Change Form of Government to Council-Manager.**

Council agreed to move forward with a public hearing to hear public comment on a proposed amendment to the town charter.

**Motion:** Councilmember Pruitt made a motion to approve the Resolution of Intent to Consider an Ordinance Amending the Charter of the Town of Weddington to Change Form of Government to Council-Manager.

**Vote:** The motion passed with a unanimous vote.

### **E. Discussion of WCWAA Funding**

Council discussion WCWAA funding. The WCWAA is seeking funds to upgrade the lights at the park. The town can provide a grant opportunity with a capital improvement grant agreement. WCWAA is seeking funds for the lights, not operational dollars. If looking to set up park use and a park and rec department, the town would be providing annual operating dollars and they could enter into a management services agreement. Council discussed the town obligation, possible liability issues, and what the town and WCWAA would expect from an agreement. Council directed staff to meet with WCWAA representatives and get an idea of expectations and needs. Council agreed to discuss and the retreat next year.

### **F. Discussion of Extra-territorial Jurisdiction Map**

Councilmember Perryman explained that the Western Union Municipal Alliance (WUMA) is working on an extraterritorial jurisdiction (ETJ) request to the county. They need a form map to present with the request showing the specific unincorporated areas the town is asking for. Councilmember Perryman requested the Council to approve giving staff direction to create a map of the unincorporated properties for the ETJ request.

Council discussed voluntary annexation as an option to requesting ETJ. Mayor Pro Tem Propst expressed support for property owner rights. Councilmember Howie stated that people who chose to buy in the county did so because they didn't want to live in a municipality.

Councilmember Perryman asked for a consensus to give staff direction to create a map with proposed ETJ parcels. Council agreed.

## **12. Updates from Town Planner and Town Administrator**

Update from Planner: Staff has identified three qualified respondents from the solicitation to move forward to in-person interviews. We conducted two of those interviews last week and will conduct the final interview on this Wednesday afternoon. We anticipate having this matter back before the Council at the December meeting to select and award the contract to the number one ranked firm.

Update from Administrator: Tree Lighting will be this Friday from 5:30 to 8:30. The tree will be lit around 7:00. With the approval of the solid waste ordinance/fee ordinance/and fee, bills will be sent out as soon as possible. We will send out an announcement when they go out. Town Hall will be closed for Thanksgiving next Thursday and Friday (the 24<sup>th</sup> and 25<sup>th</sup>).

## **13. Code Enforcement Report**

Staff is working with Code Enforcement Officer on a few of the violations. Report is in the packet.

## **14. Update from Finance Officer and Tax Collector**

Tax bill have been mailed out and trash bills will be sent mid-December. Monthly statements are in the packet.

## 15. Transportation Report

Mayor Horn stated that he would like to see the dates for the Rea Road Extension and Providence Road widening get confirmed.

## 16. Council Comments

Councilmember Perryman: Thank you everybody for coming out and sharing your opinions. Appreciate your participation. Happy early Thanksgiving. Thanks to town staff for everything you do every day.

Councilmember Pruitt: Ditto. Thank you for coming out and thank you to staff.

Mayor Pro Tem Propst: Ditto again. Thank you to staff, we couldn't do what we do without you. Thank you to the residents for coming out and keeping us honest. Thank you Karen Wolter and Deputies Kropp, Wrenn, and Huffman.

Councilmember Howie: Thank you everybody. Thank you Janice for everything you did for the Friday night tree lighting.

Mayor Horn: I am on the NC League of Municipalities Municipal Committee and I will report on legislation before the General Assembly that may impact the town. The town tree lighting is Friday at 5:30 and the Menorah lighting will be at 5 p.m. on Thursday December 22<sup>nd</sup>. Congratulations to the Union County Sheriff's office on their new facility, it is quite impressive.

## 17. Adjournment

**Motion:** Mayor Pro Tem Propst made a motion to adjourn the November 14, 2022 Regular Town Council meeting at 8:55 p.m.

**Vote:** The motion passed with a unanimous vote.

Approved: \_\_\_\_\_

\_\_\_\_\_  
D. Craig Horn, Mayor

\_\_\_\_\_  
Karen Dewey, Town Administrator/Clerk





**Town of Weddington**  
**2023 Holiday Calendar**

New Year's Day	January 2	Monday
Martin Luther King, Jr. Day	January 16	Monday
Good Friday	April 7	Friday
Memorial Day	May 29	Monday
Independence Day	July 4	Tuesday
Labor Day	September 4	Monday
Veterans Day	November 10	Friday
Thanksgiving	November 23 & 24	Thursday & Friday
Christmas	December 25 & 26	Monday & Tuesday

TOWN OF WEDDINGTON  
SUMMARY AMENDED GENERAL FUND BUDGET  
FYE 6/30/2023

Tax Rate 4.8 cents	FY2022 AMENDED BUDGET	FY2023 PROPOSED BUDGET	FY2023 AMENDED BUDGET	
<b>Revenues</b>				
Ad Valorem Taxes	\$ 1,554,500	\$ 1,517,000	\$ 1,517,000	
Solid Waste Fees			\$ 560,000	{A}
State-Collected Revenues	940,000	1,042,500	1,042,500	
Transfers from ARPA Special Revenue Fund			316,000	{B}
Zoning and Subdivision Revenues	\$ 44,700	\$ 30,000	\$ 30,000	
Other Revenues	\$ 1,380	\$ 2,000	\$ 9,750	
<b>Total Revenues</b>	<b>\$ 2,540,580</b>	<b>\$ 2,591,500</b>	<b>\$ 3,475,250</b>	
<b>Expenditures</b>				
Administrative Expenditures	\$ 719,715	\$ 552,540	\$ 725,340	{B}
Planning and Zoning Expenditures	\$ 584,290	\$ 780,085	\$ 866,035	
General Government Expenditures	\$ 1,236,575	\$ 1,258,875	\$ 1,883,875	{A}{B}
<b>Total Expenditures</b>	<b>\$ 2,540,580</b>	<b>\$ 2,591,500</b>	<b>\$ 3,475,250</b>	
<b>Appropriation from Fund Balance</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 0</b>	

{A} Fees and corresponding expenditures for 6 months of solid waste service (January-June 2023)

{B} ARPA special revenue funds used as revenue replacement to fund UCSO deputy contract and salary expenses  
Additional contract labor for FY23 estimated portion of Comprehensive Plan/Downtown Master Plan contract



## MEMORANDUM

**TO:** Mayor and Town Council  
**FROM:** Karen Dewey, Town Administrator/Clerk  
**DATE:** December 12, 2022  
**SUBJECT:** Public Hearing on an Ordinance to amend section 5-1 of the Charter of the Town of Weddington to change the form of government from Mayor-Council to Council-Manager

Pursuant to NCGS 160A-102, proposed charter amendments must first be submitted to a public hearing. Council will be hearing public comments on a proposed amendment to the Charter of the Town of Weddington to change the form of government. Over the last 8 months, the Council has been reviewing and discussing the original Town Charter for the Town of Weddington for several months with the goal to make sure as the town continues to grow, that the charter, along with the form of government can continue to meet the needs of the community. Professionals from the UNC School of Government and from the NC League of Municipalities have made presentations in public meetings to share the differences and the pros and cons of both forms of government.

There is no consideration of the charter amendment this evening.



## TOWN OF WEDDINGTON

### Rules for Public Hearings and Public Comments

- *Please sign up to speak before the meeting on the sign-up sheet located near the entrance to the Council room.*
  - *The Council will allocate up to 1 hour during each meeting to hear general Public Comments.*
  - *The Council will allocate up to 1 hour for each public hearing on the Agenda.*
1. Provide your name and address before you begin your comments.
  2. Public Comments are limited to 4 minutes. Public Hearing comments are limited to 3 minutes.
  3. Comments are to be directed to the entire board and not to individuals nor to the public attending the meeting.
  4. A designated spokesperson for a group of three or more may be allocated 6 minutes to speak. At least three members of the group must be present and names and addresses of those members present must be submitted to the Town Clerk before the meeting begins. Other than pursuant to this rule, you may not give your time to another speaker to increase that speaker's allotted time.
  5. You must be civil in your language and presentation and act within reasonable standards of courtesy.
  6. Use of slander, name-calling, personal attacks or threatening speech or behavior is prohibited.
  7. The audience must maintain order and decorum in their conduct. Please refrain from disruptive applause, comments or disorderly speaking during the meeting. Demonstrative disturbances will be prohibited.
  8. The Mayor or a majority of the Board may suspend these rules at their discretion.
  9. Failure to abide by these rules after receiving notice by the Mayor may result in 1) termination of your comment period and/or 2) your removal from the meeting.



---

## MEMORANDUM

**TO:** Town Council  
**FROM:** Robert G. Tefft, Town Planner  
**DATE:** December 12, 2022  
**SUBJECT:** Award of Contract for Comprehensive Plan/Downtown Master Plan

---

### BACKGROUND:

On September 12, 2022, Town Council authorized staff to issue a Request for Proposals (RFP) to engage the services of a consultant for the preparation of a new Comprehensive Plan/Downtown Master Plan for the Town. The RFP was issued on September 19, 2022 with a deadline to respond of October 21, 2022. Four responses were received prior to this submittal deadline; however, one of those responses was determined non-responsive and excluded from further consideration.

The three remaining responses were reviewed by the technical evaluation committee with all three respondents being interviewed over November 9 and 16, 2022. Following the completion of the interview process, the technical evaluation committee scored the responses as follows:

- Benchmark Planners 73.5 points
  - Stewart / LandDesign 88.5 points
  - S&ME, Inc. 92 points
- 

### RECOMMENDATION:

Based upon the above, which is a summary of the attached Scoring Matrix, staff is recommending that the Town Council award the contract for the Comprehensive Plan /Downtown Master Plan to S&ME, Inc. and execute the same. A copy of the Contract for Services drafted by the Town Attorney and signed by a duly authorized representative of S&ME, Inc. is attached with this item.

---

#### Attachments:

- Notice of Intent to Select and Award / Scoring Matrix
- RFP Response from S&ME, Inc.
- Contract for Services

**Notice of Intent to Select and Award**  
**Town of Weddington, North Carolina**  
**Comprehensive Plan / Downtown Master Plan**

The technical evaluation committee has completed its review of the responses to the above referenced solicitation. A copy of the scoring matrix is provided below. The following firms were determined non-responsive:

I. CRIT Workshop

The Town Planner will present the ranking of qualified responses and a recommendation for award to the top ranked firm to the Weddington Town Council at its meeting scheduled for the date and time below:

Date: December 12, 2022  
Time: 7:00 p.m.  
Location: Weddington Town Hall, 1924 Weddington Road

Contact the Town Planner for additional information:

Name: Robert Tefft  
Phone: 704-846-2709  
Email: [rtefft@townofweddington.com](mailto:rtefft@townofweddington.com)

<p>Technical Evaluation Form</p> <p>for</p> <p>Comprehensive Plan and Downtown Master Plan</p> <p>Request for Proposal</p> <p>December 12, 2022</p> <p>Town of Weddington</p>	<b>Project Approach</b>	<b>Consultant' s Overall Experience and Qualifications</b>	<b>Project Manager' s Overall Experience and Qualifications</b>	<b>Interview</b>	<b>Cost Proposal</b>	<b>Total</b>	<b>PERCENTAGE OF PERFECT SCORE</b>
Maximum Score	30	25	20	15	10	100	
Becnchmark Planners	19	20	16	10	8.5	73.5	74%
Stewart	27	22	17	13	9.5	88.5	89%
S&ME	26	24	18	14	10	92	92%

<p>Technical Evaluation Form</p> <p>for</p> <p>Comprehensive Plan and Downtown Master Plan</p> <p>Request for Proposal</p> <p>December 12, 2022</p> <p>Town of Weddington</p>	<b>Project Approach</b>	<b>Consultant' s Overall Experience and Qualifications</b>	<b>Project Manager' s Overall Experience and Qualifications</b>	<b>Interview</b>	<b>Cost Proposal</b>	<b>Total</b>	<b>PERCENTAGE OF PERFECT SCORE</b>
Maximum Score	30	25	20	15	10	100	
Becnchmark Planners	19	20	16	10	8.5	73.5	74%
Stewart	27	22	17	13	9.5	88.5	89%
S&ME	26	24	18	14	10	92	92%





# *Town of* **WEDDINGTON**

**Comprehensive Plan/Downtown Master Plan**



## **Submitted by:**

**S&ME, Inc. | October 21, 2022**  
**3201 Spring Forest Road,**  
**Raleigh, NC 27616**  
**Sarah Sinatra Gould, AICP**  
**Project Manager**  
**[Sgould@smeinc.com](mailto:Sgould@smeinc.com)**



# Table of CONTENTS\*

01   Cover Letter.....	2
02  Qualifications for Consultant.....	3
• Firm Profile.....	3
• List of Recent Projects* .....	4
• Resumes* .....	5
03   Qualifications for Project Manager* .....	27
• Project Manager Description/Projects* .....	27
• Project Manager Resume* .....	28
04   Statement of Approach.....	30
05   Consultant’s Management Plan.....	36
• Management Plan.....	36
• Organization Chart.....	38
• Staff Availability.....	39
06   References.....	40
07   Cost Proposal.....	46
08   Firm Licenses & Insurance* .....	47
09   Conflict of Interest.....	49

\*Not included in page count





# 01

*Cover Letter*

October 21, 2022

Town of Weddington, NC  
Robert Tefft, Town Planner  
Karen Dewey, Town Administrator/Clerk  
1924 Weddington Road,  
Weddington, NC 28104

**Re: RFP Comprehensive Plan/Downtown Master Plan**

Dear Mr. Tefft and Ms. Dewey:

Weddington has experienced significant growth over the last 30 years. Once a rural area, today it is a suburban community of nearly 14,000 residents located just outside the 485 Beltway. Despite this growth, the Town still lacks a downtown or town center that provides residents with a common sense of place. A central civic gathering space along with a complementary plan for future growth are fundamental to long-term community prosperity.

S&ME is an interdisciplinary firm offering planning, urban design, transportation, landscape architecture, engineering, environmental, and construction services through a unique collaborative approach. Founded in North Carolina in 1973, S&ME has grown to an 1,100-person corporation operating from 33 offices across the United States.

We understand that the specifications in this request seek a Comprehensive Plan that coordinates infrastructure, focuses on quality of life and protection of natural resources, improves economic development opportunities, including fiscal impact analysis, clarifies the Town's policies, and provides efficiency. Our approach will engage residents to deliver a community-driven Plan for the Town.

Our Placemaking team specializes in both comprehensive plans and downtown master plans. Our practice was founded on the importance of fostering dynamic places and civic spaces through our plans and designs. We understand how to coordinate comprehensive and downtown planning efforts. We also have experience in the creation of new town/city centers, most recently with the City of Pinellas Park, Florida.

Thank you in advance for your consideration; we look forward to expanding our thoughts and ideas through the interview process.

Sincerely,  
**S&ME, Inc.**



Sarah Sinatra Gould, AICP  
Project Manager  
Sgould@smeinc.com



George Kramer, AICP, LEED AP (**Authorized Representative**)  
Vice President/Placemaking Area Manager  
Gkramer@smeinc.com





# 02

*Qualifications  
for Consultant*



## FIRM PROFILE

**S&ME** is unique. We offer a comprehensive suite of professional services, such as planning, urban design, landscape architecture, engineering, environmental, and construction services, delivered through a **collaborative** approach; this allows us to maximize creativity without undermining function. More than just another multidisciplinary firm, **S&ME is interdisciplinary.**

Founded in 1973, we have grown to an 1,100-person corporation operating from 34 offices across the United States. S&ME is owned by our employees who remain faithful to our core values of safety, quality, and client service. Our goal is to provide practical solutions to our clients' infrastructure, development, and environmental

challenges. We care about our clients and devote our abundant resources and technical expertise to helping them successfully achieve their objectives. The firm has enjoyed great success, receiving peer recognition and numerous professional awards for our projects.

**Placemaking** is a design perspective that recognizes the interconnected relationship between transportation systems, private development, and civic spaces. Our planners, urban designers, landscape architects, civil engineers, and multi-modal transportation professionals utilize S&ME's interdisciplinary approach to think beyond project site boundaries and design for the people and experiences of the larger place. We are passionate about building great places and improving our communities.

Our planning team has developed a specific practice area focused on traditional planning, including comprehensive planning, land development code updates, form-based codes, design guidelines, redevelopment, economic development, historic preservation, and small area studies. S&ME has assisted numerous cities and counties with the preparation of streamlined, user-friendly land use plans, comprehensive plans, land development regulations, form-based codes, design standards, and technical manuals. Our current and previous clients range from rural counties to fast-growing urban communities.

The S&ME planning team includes fourteen (14) planners (twelve (12) AICPs) with more than 150 years of collective experience. Our approach to planning is based on intense public participation and visioning coupled with analysis of the latest economic and demographic data. Our plans are user-friendly, with concise writing and clear graphics illustrating concepts that provide predictability for the local government, the development community, and the general public.

**We have prepared, amended, rewritten, and/or assessed comprehensive plans for 38 jurisdictions.** Our deep understanding of growth management will be an asset to the Town of Weddington, making sure the Plan updates meets the Town's vision as well as Chapter 160D of the State Statutes.



**S&ME DEFINES SUCCESS THROUGH QUALITY-BUILT PROJECTS. WE HAVE BUILT OUR COMPANY TO PARTNER WITH CLIENTS AND ADVANCE PROJECTS FROM PLANNING TO DESIGN AND THROUGH CONSTRUCTION.**





## LIST OF RECENT PROJECTS



**VISION PLAN** - Robertson County, TN

[Social Pinpoint Link](#)

**LAND USE PLAN UPDATE** - Effingham County, GA

[Social Pinpoint Link](#)

**MUNICIPAL ZONING & DEVELOPMENT ORDINANCE UPDATE** - Hardeeville, SC

[Social Pinpoint Link](#)

**COMPREHENSIVE PLAN** - Trinity, NC

[Social Pinpoint Link](#)

**DOWNTOWN MASTER PLAN** - Green Cove Springs, FL

[Social Pinpoint Link](#)

[Master Plan Link](#)

[Style Guide Link](#)

**CITY CENTER PLAN** - Pinellas Park, FL

[Social Pinpoint Link](#)

[Report](#)

[Style Guide](#)

[Video](#)

**CITYWIDE MOBILITY PLANNING** - St. Augustine, FL

[Video](#)

# GEORGE KRAMER

## AICP, LEED AP

### PRINCIPAL-IN-CHARGE



22 Years of Experience

AICP #020533

Orlando, FL



### PROFILE

Strategy and implementation are at the forefront of George's approach to planning. He possesses a keen understanding of technical, administrative, and political issues and specializes in the successful execution of complex projects. George is committed to an **interdisciplinary** approach to Placemaking that emphasizes collaboration across professional disciplines to deliver innovation and value to clients.

### EDUCATION

- Master of Urban & Regional Planning, University of Florida, Gainesville, FL, 2007
- Bachelor of Political Science, University of Florida, Gainesville, FL, 1999

### SKILLS

- Strategic Master Planning
- Comprehensive Planning
- Land Use Entitlements
- Redevelopment Planning
- Complete Streets/Multi-Modal Transportation

### EXPERIENCE

#### Community Redevelopment Plan Update (Channel District)

Principal-in-Charge | Tampa, FL

A redevelopment strategy that includes increased open space to advance the transition of this former industrial area into a livable 21st century urban neighborhood/mixed-use district.

- Facilitated community workshops
- Directed the redevelopment strategy

#### Community Redevelopment Plan Update

Principal-in-Charge | Pinellas Park, FL

An extension of the operational timeframe through coordination with a Charter County and developed a redevelopment strategy focused on the creation of a new City Center.

- Directed the redevelopment strategy
- Provided senior review of deliverables

#### Community Redevelopment Plan Update (St. Andrews)

Principal-in-Charge | Panama City, FL

A redevelopment strategy that included improved mobility and placemaking to enhance the district as a mixed-used waterfront destination.

- Directed the redevelopment strategy
- Provided senior review of deliverables

#### Complete King Street Master Plan

Principal-in-Charge/Project Lead | St. Augustine, FL

An integrated land use and transportation plan for this 1-mile corridor which serves as the primary gateway into the City.

- Facilitated multiple public workshops
- Led street section design efforts to advance a more walkable, "Best Mile Florida"



# GEORGE KRAMER

## AICP, LEED AP

### EXPERIENCE CONTINUED

#### **FDOT D1 SR 78/Pine Island Road Corridor Vision and Action Plan**

Principal-in-Charge | Cape Coral, FL

An integrated land use and transportation vision plan for a 9.2-mile segment of SR 78 passing through the City of Cape Coral.

- Senior reviewer of deliverables
- Coordinated public engagement efforts

#### **City Center Plan**

Principal-in-Charge/Project Lead | Pinellas Park, FL

A community vision, master plan and phased implementation strategy for the Park Station District; Centered on the creation of Davis Commons, a new signature public space. Developed a strategy to reposition City-owned parcels into a new City Center.

- Developed a strategy to reposition City-owned parcels into a new City Center
- Created a strategic implementation phasing plan

#### **Downtown Master Plan**

Principal-in-Charge/Project Lead | Green Cove Springs, FL

A community vision, master plan, and phased implementation strategy for revitalization that is centered on the development of a waterfront catalyst-site.

- Developed a visual plan tailored for the general public that included a compelling narrative and clear action items
- Identified a catalyst redevelopment site and provided a strategic phasing plan for capital projects

#### **Downtown Master Plan**

Principal-in-Charge/Project Lead | Fort Pierce, FL

A community vision, master plan, and phased implementation strategy for revitalization that is centered on a re-imagined waterfront.

- Developed redevelopment strategy to create a new waterfront district in Downtown
- Facilitated public workshops and meetings during a 4-day design charrette

#### **Princeton Master Plan (Packing District)**

Principal-in-Charge/Project Lead | Orlando, FL

Developed the original master plan for the 84-acre redevelopment area in Orlando now known as the Packing District.

- Created urban plan and corresponding development program
- Created a plan to revise the existing street network
- Developed strategy and advanced partnerships for implementation

# PATRICIA TYJESKI

## AICP

### SENIOR REVIEWER



34 Years of Experience

AICP #069120

Orlando, FL



### PROFILE

Pat has extensive experience with long range comprehensive planning, land development regulations, zoning, historic preservation and development review. Over the course of her career, Pat has worked with over 30 jurisdictions on numerous comprehensive planning projects.

### EDUCATION

- Master of Regional Planning, Cornell University, Ithaca, NY, 1988
- Bachelor of Architecture, Universidad Javeriana, Bogotá, Colombia, 1985

### SKILLS

- Comprehensive Planning
- Land Development Regulations
- Historic Preservation
- Development Review
- Public Engagement

### EXPERIENCE

#### Comprehensive Plan Update

Project Manager | Green Cove Springs, FL

Updated the City's Comprehensive Plan to address changes in local conditions, including the construction of the First Coast Expressway and substantial recent annexations.

- Managed the preparation of the future land use and transportation elements and coordinated the update of other elements with staff
- Developed policies to revitalize the downtown, protect historic sites, improve urban form along major transportation corridors, and apply complete streets principles
- Utilized Social Pinpoint, a web-based community engagement tool, to facilitate public input through a survey, an interactive map, and a virtual meeting portal

#### Comprehensive Plan Update

Project Manager | Wildwood, FL

Updated the City's Comprehensive Plan to address substantial recent growth and to establish a new vision for growth.

- Managed the update of eight elements, including Data & Analysis, Goals, Objectives, & Policies, and map series
- Utilized Social Pinpoint, a web-based community engagement tool, to facilitate public input through a survey, an idea wall, and a virtual meeting portal
- Facilitated public workshops and presented the update at adoption hearings

#### Comprehensive Plan and LDC Updates

Project Manager | Manatee County, FL

Assisted Manatee County in its efforts to ensure the Comprehensive Plan includes the long-range growth directives and the Land Development Code (LDC) implements those directives. When the Plan was developed in 1989, many specific provisions were included as placeholders, until more detailed regulations were adopted.

- Led the research of several topic areas including connectivity provisions, coastal management, street trees, and complete streets
- Prepared edits to the Comprehensive Plan and corresponding amendments to the Land Development Code. to ensure consistency

# PATRICIA TYJESKI

## AICP

### EXPERIENCE CONTINUED

#### **Curry Ford Road Corridor Vision Plan**

Project Manager | Orlando, Florida

Prepared a vision plan for the Curry Ford Road corridor and surrounding neighborhoods to ensure the foundation of this healthy, vibrant area remains strong and provides for long-term stability for residents, visitors, and businesses.

- Evaluated the growth potential and probability by land use type expected to strongly impact existing transportation facilities
- Proposed changes to roadway design
- Recommended policy and code changes to direct future redevelopment in the area

#### **FDOT District 1 US 27 Clewiston Corridor Vision Plan**

Project Manager | Clewiston, FL

Prepared an integrated land use and transportation vision plan for a 6.5-mile stretch of US 27/SR 80 extending from County Road 720 to the Hendry/ Palm Beach County line through the City of Clewiston.

- Managed the preparation of an existing conditions assessment (socio-demographics, land use, mobility, environment)
- Developed a vision and action plan for the US 27 corridor
- Facilitated an on-site walkabout and extensive public engagement activities

#### **Community Redevelopment Plan Update**

Principal-in-Charge | Palatka, FL

Participated in the update of the Community Redevelopment Plan for the City of Palatka.

- Oversaw the completion of the project within schedule and budget
- Provided Senior Review of deliverables

#### **Community Redevelopment Plan Update (Downtown)**

Principal-in-Charge | Kissimmee, FL

Participated in the update of the Downtown Community Redevelopment Plan and the extension of the operational timeframe of the CRA to 2052. The update consisted of a full rewrite of the plan with specific focus on urban design and improving the livability of the downtown.

- Oversaw the completion of the project within schedule and budget
- Provided Senior Review of deliverables
- Participated in community engagement opportunities

# CHRIS DOUGHERTY

## AICP

### SENIOR PLANNER/GIS SPECIALIST



17 Years of Experience

AICP #026356

Orlando, FL



### PROFILE

With experience in providing private and public sector planning services, Chris's career has been focused on helping clients create unique places. Chris has a passion for developing community-driven plans and excels at comprehensive planning, land development code writing, visioning/public engagement, parks and recreation planning, and entitlements. He also has a strong background in GIS and manages the GIS operations in the Orlando office.

### EDUCATION

- Master of Arts in Urban & Regional Planning, University of Florida, Gainesville, FL, 2006
- Bachelor of Arts in Criminology, University of Florida, Gainesville, FL, 2001

### SKILLS

- Comprehensive Planning
- Land Development Code Writing
- Development Review
- Redevelopment Planning
- GIS Analysis
- Parks and Recreation System Planning
- Public Engagement
- Visioning
- Land Use Entitlements
- Grant Writing

### EXPERIENCE

#### County Comprehensive Plan (Unincorporated)

Project Manager | Sumter County, FL

A 2045 planning horizon to document a new community vision that addresses the impacts from the rapid influx of retirees in one of the fastest-growing counties in the state.

- Managed the project delivery and schedule
- Reviewed and prepared data and analysis
- Facilitated three live and simulcasted in Zoom public workshops

#### Comprehensive Plan Update

Project Manager | Lake Wales, FL

A 2040 planning horizon to document a new community vision and address the impacts of a municipal population that had increased 50% since the last update in 2000.

- Managed the project delivery and schedule
- Prepared and/or reviewed each element's data and analysis and goals, objectives, & policies
- Facilitated three virtual public workshops in Zoom

#### Comprehensive Plan Update

Senior Planner | Wildwood, FL

A 2040 planning horizon to document a new community vision and address the impacts of rapid population growth and the expansion of The Villages®.

- Assisted with GIS analysis and future land use map series
- Assisted with the transportation analysis
- Advised the team on statute requirements

# CHRIS DOUGHERTY

## AICP

### EXPERIENCE CONTINUED

#### **Comprehensive Growth & Development Plan**

Project Planner | Hillsborough County, FL

Updated the County's Commercial Locational Criteria, which identifies the potential location and maximum size of neighborhood-serving commercial uses permitted within residential future land use categories.

- Assisted in the preparation of the interactive public engagement website
- Assisted with facilitating public workshops and stakeholder interviews
- Assisted with the literature review and summary memorandums

#### **Comprehensive Plan and Land Development Code Amendments (Downtown)**

Project Planner | Sanford, FL

Assisted the City by amending the comprehensive plan and land development code to ensure the desired development for Downtown Sanford was permissible.

- Assisted in the preparation of more flexible standards on the Comprehensive Plan and Land Development Code
- Researched other communities' plans and prepared data and analysis for the plan amendments

#### **Community Redevelopment Plan Update (Downtown)**

Senior Planner | Kissimmee, FL

A Downtown redevelopment strategy that identified "catalyst sites" and targeted improvements for mobility and placemaking.

- Assisted with identifying key redevelopment strategies and programming for the Plan update
- Other responsibilities included developing a housing strategy for the Plan, updating GIS data, and assisting with the facilitation of a virtual public engagement

#### **Community Redevelopment Plan Update**

Project Planner | Lake Wales, FL

A place-based redevelopment strategy that leverages the City's historic downtown, natural amenities, and extensive cultural resources.

- Assisted with identifying key redevelopment strategies for the Plan
- Other responsibilities included updating GIS data and assisted with public engagement preparation

# NICK HILL

## AICP

### PLANNER/MASTER PLAN SPECIALIST



5 Years of Experience

AICP #33455

Orlando, FL



### PROFILE

Nick is well-versed in the field of contemporary urban and regional planning. His professional experience has included updating comprehensive plans and community redevelopment plans, performing reviews of development applications for municipalities, and facilitating entitlement research, land use and rezoning amendments, special use permits, and variance requests. Nick is also a highly skilled Geographic Information System (GIS) technician.

### EDUCATION

- Master of Arts in Urban & Regional Planning, University of Florida, Gainesville, FL, 2019
- Bachelor of Science in Public Administration, University of Central Florida, Orlando, FL, 2015

### SKILLS

- Comprehensive Planning
- Redevelopment Planning
- Master Planning
- Land Use Entitlements
- Development Review
- Geographic Information Systems
- Public Engagement

### EXPERIENCE

#### Comprehensive Plan Update

Deputy Project Manager | Green Cove Springs, FL

A 2045 planning horizon to document a new community vision and address the impacts of the new First Coast Expressway and substantial recent annexations.

- Amended the Data & Analysis, as well as the Goals, Objectives, & Policies for the Future Land Use Element
- Drafted the Future Land Use Map Series and other maps relevant to the Plan Update
- Coordinated and participated in stakeholder meetings, commissioner briefings, and public workshops
- Developed and managed the project website using the Social Pinpoint public engagement platform

#### Comprehensive Plan Update

Deputy Project Manager | Lake Wales, FL

A 2040 planning horizon to document a new community vision and address the impacts of a municipal population that had increased 50% since the last update in 2000.

- Revised the Data & Analysis, as well as the Goals, Objectives, & Policies for the Future Land Use, Housing, Intergovernmental Coordination, and Economic Development Elements
- Led the GIS mapping/analysis efforts for multiple elements of the Comprehensive Plan
- Assisted with hosting various steering committee meetings and public workshops

#### Comprehensive Plan Update

Project Planner | Cocoa, FL

- Prepared a matrix identifying the Comprehensive Plan's inconsistencies with recent legislative changes
- Updated the Goals, Objectives, & Policies to be consistent with new and updated Florida Statutes
- Incorporated new strategies into the Coastal Management Element to improve the adaptive capacities of the City against sea level rise, storm surge, and flooding

## NICK HILL

### AICP

#### EXPERIENCE CONTINUED

##### **Comprehensive Plan Update**

Project Planner | Fort Pierce, FL

A 2030 planning horizon to address issues address statutory changes, such as Peril of Flood legislation, that were identified through an evaluation and appraisal of the plan.

- Drafted a matrix identifying how the Comprehensive Plan would need to be updated to be consistent with recent changes in state law
- Amended the Goals, Objectives, & Policies of various elements to ensure compliance with new Florida Statutes
- Led the GIS analysis, modeling, and mapping process to meet Peril of Flood requirements, per Sec. 163.3178(2)(f), F.S.

##### **Complete King Street Master Plan**

Project Planner | St. Augustine, FL

An integrated land use and transportation plan for this 1-mile corridor which serves as the primary gateway into the City.

- Assisted with drafting the existing conditions report by conducting an extensive desktop analysis of the study area using a suite of GIS software and a comprehensive review of the City's current planning documents
- Supported the project team's online and in-person engagement efforts by managing the project website and attending public workshops

# KATIE MARTIN

## AICP

### PLANNER/GIS SPECIALIST



3 Years of Experience

AICP #34287

Raleigh, NC



### PROFILE

Katie is passionate about sustainability, resiliency, walkability, and community development. She thrives working with data and much of her work revolves around geospatial analysis, report creation, writing, and editing. Her experience with crafting comprehensive plans, adaptation action plans, and sustainability plans demonstrates her focus on the environmental well-being of communities.

### EDUCATION

- Master of City & Regional Planning, Georgia Institute of Technology, Atlanta, GA, 2020
- Master of Science in Public Policy, Georgia Institute of Technology, Atlanta, GA 2020
- Bachelor of Science in Earth & Environmental Science, Mercer University, Macon, GA, 2012

### SKILLS

- Community Engagement
- Geographic Information Systems (GIS)
- Data & Analysis
- Redevelopment Planning
- Resiliency & Adaptation Planning
- Adobe Creative Suite (InDesign, Illustrator)
- Writing & Editing

### EXPERIENCE

#### Comprehensive Plan Update (Unincorporated)

Planner | Sumter County, FL

A 2045 planning horizon to document a new community vision that addresses the impacts from the rapid influx of retirees in one of the fastest-growing counties in the state.

- Created map series using ArcGIS Pro
- Prepared final report using Adobe InDesign

#### Unified Comprehensive Plan (Cities)

Planner | Sumter County, FL

A 2045 planning horizon for the Cities of Coleman, Webster, and Center Hill to document new community visions that address the impacts from the rapid influx of retirees in one of the fastest-growing counties in the state.

- Created map series using ArcGIS Pro
- Prepared comprehensive plan elements, including housing, intergovernmental coordination, and recreation and open space

#### Comprehensive Plan Update

Planner | Lake Wales, FL

A 2040 planning horizon to document a new community vision and address the impacts of a municipal population that had increased 50% since the last update in 2000.

- Prepared final report using Adobe InDesign

#### Comprehensive Plan Update

Planner | Wildwood, FL

A 2040 planning horizon to document a new community vision and address the impacts of rapid population growth and the expansion of The Villages®.

- Assisted with the development of the Comprehensive Plan Elements
- Performed data analysis, including geospatial analysis



## KATIE MARTIN

### AICP

#### EXPERIENCE CONTINUED

##### Land Use Plan Update

Planner | Effingham County, GA

A 2040 planning horizon to update the Land Use Plan to be in line with current conditions as well as develop character areas.

- Perform geospatial analysis using ArcGIS Pro to identify development areas
- Update the Future Land Use Map in conjunction with the County's zoning regulations

##### Vision Plan

Planner | Robertson County, TN

A community engagement effort to determine if changes were needed for the County's 2013 Growth Plan. This included significant public input to prepare a Vision Plan for the County.

- Engage with the community through the initial visioning process
- Prepare geospatial maps to assist in the community engagement process

##### Community Redevelopment Plan Update (Downtown)

Planner | St. Augustine, FL

Updating the Historic Area Community Redevelopment Plan and extending operational timeframe of the Agency. *(This project is current and not yet completed).*

- Performed geospatial analysis using ArcGIS Pro
- Assisted with socioeconomic analysis, land use analysis, and report development

##### Community Redevelopment Plan Update

Planner | Sebring, FL

An extension of the operational timeframe and developed a place-based redevelopment strategy that leverages the history, character, and authenticity of the City's downtown.

- Performed geospatial analysis and created a map series using ArcGIS Pro
- Assisted with report development, budgeting, and funding calculations

##### Community Redevelopment Plan Update (Channel District)

Planner | Tampa, FL

A redevelopment strategy that includes increased open space to advance the transition of this former industrial areas into a livable 21st century urban neighborhood/mixed-use district.

- Led community engagement throughout the project process
- Developed strategic plan, community redevelopment plan, and final reports

# LAURA CANARY

## CECD, FRA-RA

### REDEVELOPMENT PLANNER/MASTER PLAN SPECIALIST



20 Years of Experience

CECD #2828; FRA-RA

Tampa, FL



### PROFILE

Laura has extensive experience working in local government and has a profound understanding of the inner workings of public organizations. Much of her career has been dedicated to economic development and redevelopment. She has excellent communication and collaboration skills which enable her to effectively build consensus and effectuate change. Laura is committed to growing and enhancing vibrant, sustainable communities.

### EDUCATION

- Master of Public Administration, University of South Florida, Tampa, FL, 2015
- Bachelor of Arts, University of South Florida, Tampa, FL, 2003

### SKILLS

- Community Engagement
- Collecting, Synthesizing, and Presenting Public Information
- Economic Development/Redevelopment Planning

### EXPERIENCE

#### Community Redevelopment Plan Update (Downtown)

Project Manager | St. Augustine, FL

Updating the Historic Area Community Redevelopment Plan and extending operational timeframe of the Agency.

- Completed a Findings of Necessity (FON) and provide a Blight Matrix
- Updating the Historic Area CRA Plan
- Facilitating the extension of the CRA operational timeframe

#### Community Redevelopment Plan Update

Project Manager | Pinellas Park, FL

An extension of the operational timeframe through coordination with a Charter County and developed a redevelopment strategy focused on the creation of a new City Center. *(Work done while employee of City of Pinellas Park)*

- Coordinated with City to identify an appropriate expansion area of the CRA
- Oversaw the update to the Community Redevelopment Plan, expansion of the CRA boundary and extension of the operational time frame of the CRA

#### City Center Plan

Project Manager | Pinellas Park, FL

A community vision, master plan, and phased implementation strategy for the Park Station District; Centered on the creation of Davis Commons, a new signature public space. *(Work done while employee of City of Pinellas Park)*

- Directed development of the City Center Plan
- Worked with administration and elected officials and stakeholders to ensure the City Center Plan was a community driven plan

#### Economic Development Existing Conditions Analysis

Project Manager | Weston, FL

Conducting an Economic Development-Existing Conditions and Retail Market Analysis to inform the City's future economic development strategy.

- Managing development of the assessment and industry snapshot

# REGAN BUCHANAN

## PLANNER/OUTREACH SPECIALIST



1 Year of Experience

American Planning Association (APA)

Raleigh, NC



### PROFILE

Regan has experience in transportation planning, community engagement, travel behavior research, geospatial analysis, and statistical analysis. She has significant expertise in technical research and writing, which is reflected in her numerous awards and leadership roles. Regan is an effective and experienced public speaker and provides thoughtful guidance at community engagement events.

### EDUCATION

- Master of Urban & Regional Planning, Florida Atlantic University, Fort Lauderdale, FL, 2003
- Bachelor of Arts, Political Science, Florida Atlantic University, Boca Raton, FL, 2001

### SKILLS

- GIS
- Tableau
- Spanish
- Qualtrics
- Community Engagement
- Survey Design and Analysis
- Social Media Management
- Public Speaking

### EXPERIENCE

#### Vision Plan

Planner | Robertson County, TN

A community engagement effort to determine if changes were needed to the County's 2013 Growth Plan. This included significant public input to prepare a Vision Plan for the County.

- Assisted during four stakeholder meetings
- Prepared materials for two-day public open house
- Facilitated exercises at two-day public open house

#### Comprehensive Plan Update

Planner | Trinity, NC

An update to the Comprehensive Plan with a focus on public engagement.

- Prepared a survey/fact-finding information housed on a project website: [Click Here](#)
- Moderated a stakeholder's meeting for steering committee input on the vision
- Branded the project VisionTrinity
- Structured an open house for public input

#### Coweta County Comprehensive Transportation Plan Update

Transportation Planning Intern | Atlanta, GA

One sentence to describe the project at a high level and articulate any key details.

- Compiled/organized all existing/recommended infrastructure projects for the County
- Used GIS analysis/an evaluation matrix to prioritize proposed improvement projects

#### Milwaukee Complete Streets Project

Graduate Research Assistant | Atlanta, GA

The University of Minnesota partnered with Georgia Tech to compile best practices for complete streets design, specifically focusing on designs that promote safety.

- Compiled a literature review of best practices for safety designs
- Researched crime prevention through environmental design and prepared a report on its relevance to the project

# JALISA HARRIS

## AICP

### PLANNER/OUTREACH SPECIALIST



3 Years of Experience

AICP #34266

Orlando, FL



### PROFILE

Jalisa's background in meaningful community engagement has its early roots in providing services through a global civic organization and leading problem-resolution discourse. Bringing that experience into urban planning, Jalisa's public engagement approach centers on cultural relevance, self-empowerment, and interpersonal education to ascertain and reflect aspects of the community's collective identity through the planning process.

### EDUCATION

- Master of Urban & Regional Planning, University of Central Florida, Orlando, FL, 2021
- Master of Public Administration, University of Central Florida, Orlando, FL, 2019
- Bachelor of East Asian Languages & Culture – Chinese, University of Florida, Gainesville, FL, 2013

### SKILLS

- Development Review
- Comprehensive Planning
- Redevelopment Planning

### EXPERIENCE

#### Land Use Plan Update

Project Planner | Effingham County, GA

A 2040 planning horizon to update the Land Use Plan to be in line with current conditions as well as develop character areas.

- Facilitate public workshops to analyze citizen needs and desires in conjunction with County regulations to create a new Future Development Area map

#### Community Redevelopment Plan Update

Project Planner | Sebring, FL

An extension of the operational timeframe and developed a place-based redevelopment strategy that leverages the history, character, and authenticity of the City's downtown.

- Assisted the City in illustrating the accomplishments of the CRA, calculating tax increment projections, developing action strategies for the future of the CRA, as well as developing goals, objectives, & policies
- Managed and analyzed online public input data

#### Community Redevelopment Plan Update (Downtown North)

Project Planner | Panama City, FL

A Finding of Necessity Report to expand the CRA boundaries and updated plan to memorialize boundary changes.

- Analyzed areas near the pre-existing CRA to determine conditions for the expansion of the CRA district's border and produced the Finding of Necessity (FON) Report
- Assisted with illustrating the accomplishments of the CRA, calculating tax increment projections, developing action strategies for the future of the CRA, as well as developing goals, objectives, & policies

#### Community Redevelopment Plan Update (Channel District)

Project Planner | Tampa, FL

Updated the City's Comprehensive Plan to address changes in local conditions, including the construction of the First Coast Expressway and substantial recent annexations.

- Managed the virtual engagement portion of synchronous hybrid public workshops

# EM SCHAEFER

**SENIOR GRAPHIC  
DESIGNER\PUBLIC  
OUTREACH SPECIALIST**



11 Years of Experience

AIGA Board Member

Orlando, FL



## PROFILE

Em adds creative insight to projects through branding, visual communications, marketing, community engagement, wayfinding, and illustration. Her vast experience using various media to tell compelling brand stories elevates our client work across private and public sectors. She provides direction on the creative process of municipal branding and ensures we engage with the communities in which we serve through exciting and communicative ways.

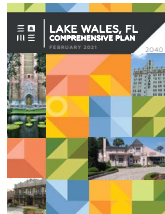
## EDUCATION

- Master of Science in Digital Marketing, University College Dublin Michael Smurfit Business School, Dublin, Ireland, 2019
- Bachelor of Arts in Visual Communications, Ball State University, Muncie, IN, 2012

## SKILLS

- Brand Positioning
- Community Engagement
- Website Design
- Logos/Branding
- Marketing Collateral
- Social Media Design & Strategy
- Infographics
- Video/Motion Graphics
- Adobe Create Suite (Illustrator, Photoshop, InDesign, After Effects, Premiere Pro)
- Signage/Wayfinding/Environmental Graphics
- Sketching & Illustrations

## EXPERIENCE



### Comprehensive Plan Update

Senior Graphic Designer | Green Cove Springs, FL

- Designed presentation templates for workshops
- Created interactive project website
- Full report: [Click Here](#)

### Comprehensive Plan Update

Senior Graphic Designer | Lake Wales, FL

- Created report featuring unique branding
- Converted data into visual infographics
- Full report: [Click Here](#)

### Comprehensive Plan Update

Senior Graphic Designer | Wildwood, FL

- Designed presentation templates for workshops and promotional marketing materials
- Created report featuring unique branding
- Converted data into visual infographics
- Full report: [Click Here](#)

### Comprehensive Plan Update

Senior Graphic Designer | Sumter County, FL

- Designed unique project branding and marketing collateral for presentations for three workshops
- Created interactive project website
- Designed report layout and supporting graphics

## EM SCHAEFER

### EXPERIENCE CONTINUED



#### Land Use Plan Update

Senior Graphic Designer | Effingham County, GA

- Designed presentation templates for workshops and promotional marketing materials
- Created project website featuring engagement tools



#### Vision Plan

Senior Graphic Designer | Robertson County, TN

- Designed unique project branding for presentations for workshops and marketing collateral
- Created interactive project website
- Designed report layout and supporting graphics

# KELLY FARABEE

## PE, PTOE, RSP1

### TRANSPORTATION/ COMPLETE STREETS ENGINEER



10 Years of Experience

FL PE #91816; PTOE #4287; RSP1 #719

Tampa, FL



### PROFILE

Kelly is a seasoned engineer with a history of developing solutions that balance both operational and safety needs for a variety of transportation uses. She has provided traffic analysis and conceptual design services for public and private clients across the Southeast. She is passionate about addressing the needs of vulnerable users and enhancing mobility and safety for all users within the public ROW.

### EDUCATION

- Master of Science Engineering, University of California - Berkeley, Berkeley, CA, 2009
- Bachelor of Science Civil Engineering, Clemson University, Clemson, SC, 2007
- Bachelor of Arts Architecture, Clemson University, Clemson, SC, 2007

### SKILLS

- Traffic Analysis
- Safety Analysis
- Operational Analysis
- Corridor Analysis
- Signal Warrant Analysis
- Intersection Control Evaluation (ICE)
- Speed Management

### EXPERIENCE

#### Waste Disposal and Recycling Center Traffic Study

Project Manager | Durham, NC

Traffic study to evaluate internal circulation challenges and both internal and external congestion at the City's WD&RC facility.

- Coordinated with City staff to gather input regarding facility operations
- Performed site visits to observe facility operations
- Coordinated with Environmental staff and subconsultants to evaluate facility operations

#### SR 78/Pine Island Road Corridor Vision and Action Plan

Complete Streets/Traffic Engineer | Cape Coral, FL

As part of the FDOT D1 Planning Studio Contract, we are preparing a Corridor Vision Plan for SR 78/Pine Island Road that serves Lee County and the City of Cape Coral. Project involves public engagement following PD&E guidelines.

- Performed site visit/review of existing conditions/developed public engagement plan

#### Greene Street Improvements

Traffic Specialist | Columbia, SC

Traffic study performed as part of a new master plan that included constructing a new grade-separated railroad crossing in downtown Columbia to enhance the connection between the University of South Carolina and a proposed river front park.

- Estimated future traffic, including changes in localized traffic patterns associated with the new railroad crossing location
- Evaluated traffic operations and performed mitigation analysis

#### Lavista Road at Fellowship Road and Chamblee Tucker Rd Improvements

Project Manager | Tucker, FL

Traffic study and conceptual design for a congested area near City of Tucker central business district.

- Coordinated with local stakeholders
- Collaborated with team to develop over 20 mitigation alternatives



# TERRY MCKLOSKI

## AICP

### SENIOR TRANSPORTATION/ COMPLETE STREETS PLANNER



30 Years of Experience

AICP #022275

Tampa, FL



### PROFILE

Terry has experience in transportation planning and urban design with extensive knowledge of land use planning, complete streets development, travel demand modeling, and traffic simulation. Terry's unique combination of planning knowledge and technical proficiencies make him an effective advocate for positive change and development of integrated land use and transportation systems.

### EDUCATION

- Master of Urban and Regional Planning, Florida State University, Tallahassee, Florida, 2006
- Bachelor of Urban and Regional Planning, Florida Atlantic University, Boca Raton, Florida, 2002

### SKILLS

- Transportation Planning
- Land Use Planning
- Complete Streets
- Development
- Travel Demand Modeling
- Traffic Simulation

### EXPERIENCE

#### Comprehensive Plan Update

Transportation Planner | Green Cove Springs, FL

A 2045 planning horizon to document a new community vision and address the impacts of the new First Coast Expressway and substantial recent annexations.

- Performed existing traffic and future traffic analysis, including capacity analysis and costing

#### Comprehensive Plan Update

Transportation Planner | Wildwood, FL

A 2040 planning horizon to document a new community vision and address the impacts of rapid population growth and the expansion of The Villages®.

- Performed existing traffic and future traffic analysis, including capacity analysis and costing
- Coordinated with MPO on transportation data, GIS, and traffic counts

#### Comprehensive Plan Visioning

Project Manager | Palm Bay, FL

Established Palm Bay Vision 2040 through a robust and inclusive public engagement process for the 16th largest city in Florida.

- Evaluated existing traffic conditions, level of service analysis, and traffic forecasting

#### SR 78/Pine Island Road Corridor Vision and Action Plan

Transportation Planner | Cape Coral, FL

As part of the FDOT D1 Planning Studio Contract, we are preparing a Corridor Vision Plan for SR 78/Pine Island Road that serves Lee County and the City of Cape Coral. Project involves public engagement following PD&E guidelines.

- Evaluated existing conditions, including socioeconomic, environmental justice, economic, land use, transportation, and environmental data
- Prepared Existing Conditions report to summarize data
- Prepared MetroQuest survey to be posted online for gathering public input



# TERRY MCKLOSKI

## AICP

### EXPERIENCE CONTINUED

#### **Complete King Street Master Plan**

Transportation Planner | St. Augustine, FL

An integrated land use and transportation plan for this 1-mile corridor which serves as the primary gateway into the City.

- Performed existing conditions analysis, forecast of future conditions, traffic analysis, and traffic simulation using VISSIM
- Developed concepts for the Bridge of Lions approach, street circulation and rerouting, and automated transit

#### **US 1 Conceptual Streetscape/Complete Streets**

Complete Streets/Traffic Engineer | Melbourne, FL

A conceptual plan to address access and speed management concerns along a 0.6-mile segment of US 1; included coordination with FDOT District 5.

- Prepared conceptual plan
- Created map of crash locations

# KRISTEN HILL

## PUBLIC FACILITIES ENGINEER



25 Years of Experience

NC PE #29147; NC PG #1791

Charlotte, NC



### PROFILE

Ms. Hill is a registered professional engineer and professional geologist who offers experience with conventional geotechnical projects; slope stability analysis; wall analysis/design; pavement design; bearing capacity/settlement analysis; multi-phase testing and inspection.

### EDUCATION

- Master of Science in Civil Engineering, Clemson University, Clemson, SC, 1997
- Bachelor of Science in Engineering Geology, Clemson University, Clemson, SC, 1997

### SKILLS

- PE, SC, 2003, #22379
- Designated Special Inspector in Mecklenburg County
- American Society of Civil Engineers

### EXPERIENCE

#### UNC Charlotte Campus Infrastructure Development Project

Geotechnical Engineer | Charlotte, NC

Geotechnical engineer for the campus infrastructure development project. Project is currently underway.

- Assisted with pavement rehabilitation, roadway widening, new roadway alignments, culvert extensions, new a multi-span bridge, and retaining wall design

#### Steele Creek Sewer Force Main and Pumping Station Replacement Project

Project Manager | Charlotte, NC

Project manager for geotechnical exploration for approximately 6.5 miles of the 36-inch main just west of Carowinds Boulevard to just west of Carolina Place Parkway and a new pump station of Choate Circle in Charlotte, North Carolina.

- Assisted with infiltration testing for multiple tunnel locations as well as geophysical testing
- Project required coordination for temporary right-of-way use with NCDOT, City of Charlotte, the City of Pineville and Norfolk Southern Railroad. Design and construction recommendations were provided for cut and cover operations as well as tunneling beneath major crossings

#### Romare Bearden Park

Senior Engineer | Charlotte, NC

Senior Engineer during the geotechnical exploration for the 5.2-acre urban site.

- Assisted with the redevelopment of the site as an urban park/garden
- Historic records for the site dated back to the 1800's and included several parcels with historical filling stations presenting environmental challenges during construction
- The new park includes a common areas, large water features, retaining walls and public facilities

# CARRIE READ

## PLA, ASLA, LEED AP

### SENIOR LANDSCAPE ARCHITECT



16 Years of Experience

FL PLA #6667316

Orlando, FL



### PROFILE

Carrie has over 15 years of experience in site design and landscape architecture throughout the Southeast. Areas of focus include streetscape design, green infrastructure and sustainable sites utilizing LEED principles, educational and institutional facilities, parks and recreation, and multi-modal transportation and bike/trail facilities. Carrie has extensive experience in managing interdisciplinary teams on a variety of projects from planning and design through construction.

### EDUCATION

- Master of Science, University of Wisconsin-Madison, Madison, WI 2008
- Bachelor of Science, University of Kentucky, Lexington, KY 2004

### SKILLS

- Urban Design
- Construction Documents
- Master Planning
- Conceptual Design
- Construction Administration
- Project Management

### EXPERIENCE

#### 1st Street Complete Street Design

Project Manager/Senior Landscape Architect | Lake Wales, FL

Master planning and construction documents for a complete street conversion in Downtown that was identified as an initial catalytic project for revitalization.

- Served as project manager for landscape architectural design and project coordination
- Developed construction documents

#### Park Avenue Streetscape

Project Manager/Senior Landscape Architect | Lake Wales, FL

Master planning and construction documents for a complete street conversion in Downtown that was identified as the second of two catalytic projects for revitalization.

- Served as project manager for landscape architectural design and project coordination
- Developed construction documents

#### Pilaklakaha (PK) Avenue Streetscape

Landscape Architect | Auburndale, FL

Design and construction documents for this road diet/complete street project that included a linear bioswale, multipurpose trail and on-street parking.

- Developed construction documents
- Review plant materials and finalized planting palette for bioswale features

#### Vine Street (US 192) Landscape Master Plan

Project Manager/Senior Landscape Architect | Kissimmee, FL

Design and 3D visualization for the proposed streetscape and intersection treatments as well as innovative strategies for green infrastructure (bioswales) along the corridor.

- Led workshops and public meetings
- Lead designer
- Developed final report and worked with staff to produce all content and deliverables

## CARRIE READ

PLA, ASLA, LEED AP

### EXPERIENCE CONTINUED

#### Walnut Street Conceptual Design

Project Manager/Senior Landscape Architect | Green Cove Springs, FL

Design and 3D visualization services for the City's downtown commercial corridor; a flexible, curbless festival street with expanded sidewalk areas and on-street parallel parking.

- Served as project manager for landscape architectural design and project coordination

#### Complete King Street Master Plan

Senior Landscape Architect | St. Augustine, FL

An integrated land use and transportation plan for this one-mile corridor which serves as the primary gateway into the City.

- Developed design concepts utilizing complete street principles
- Provided review and oversight for design visualizations and graphics

#### City Center Master Plan

Senior Landscape Architect | Pinellas Park, FL

S&ME developed the City of Pinellas Park CRA's master planning of a new 55-acre city center, renovation of its 29-acre community park and a complete street design for 78th Avenue which links the two projects.

- The community park features private sector investment opportunities along with a mix of active and passive recreational uses with an expansion of the City's performing arts center
- The master plan is intended to incentivize private sector investment around the area, consolidate facilities, create a walkable community and enhance the community's amenities for its residents

#### Waterfront Master Plan

Senior Landscape Architect | Niceville, FL

A 5-acre development master plan, Niceville Landings, in the historic waterfront downtown area of the City and part of the City's Community Redevelopment Area.

- Developed design concepts utilizing urban design principles
- Provided review and oversight for design visualizations and graphics
- Cost estimating

# GRACE ZHANG

## AICP

### URBAN DESIGNER



11 Years of Experience

AICP #32416

Orlando, FL



### PROFILE

Grace has over 10 years of experience in urban planning/design and landscape architecture. Areas of specialty include master planning and site design, corridor study and long-range planning, parks and recreation master planning and mixed-use development. She has worked with public and private clients across Florida and is very familiar with land development and entitlement.

### EDUCATION

- Master of Science in Community & Regional Planning, The University of Texas at Austin, Austin, Texas (2012)
- Bachelor of Landscape Architecture, Tongji University, Shanghai, China (2010)

### SKILLS

- Urban design
- Comprehensive, Master & Neighborhood Planning
- Landscape Architecture
- Land Development & Entitlement

### EXPERIENCE

#### Alligator Chain of Lakes Conceptual Master Plan

Planner | Osceola County, FL

Large-scale master planning effort for an 8,500-acre district within the Urban Growth Boundary expansion area; identified open space systems, street network and land uses and developed implementing comprehensive plan policies.

- Lead designer for the Conceptual Master Plan and associated exhibits
- Facilitate a series of design workshops with county staff
- Attend public meetings and hearings

#### Downtown Master Plan

Urban Designer | Fort Pierce, FL | On-going

A community vision, master plan, and phased implementation strategy for revitalization that is centered on a re-imagined waterfront.

- Lead designer for the Vision Plan and lead writer for the final Master Plan
- Facilitate a four-day design charrette

#### Downtown Master Plan

Urban Designer | Green Cove Springs, FL

A community vision, master plan, and phased implementation strategy for revitalization that is centered on the development of a waterfront catalyst-site.

- Facilitated a five-day design charrette
- Worked closely with city staff, stakeholders, and citizens to prepare the final Master Plan
- Prepared project cost estimates

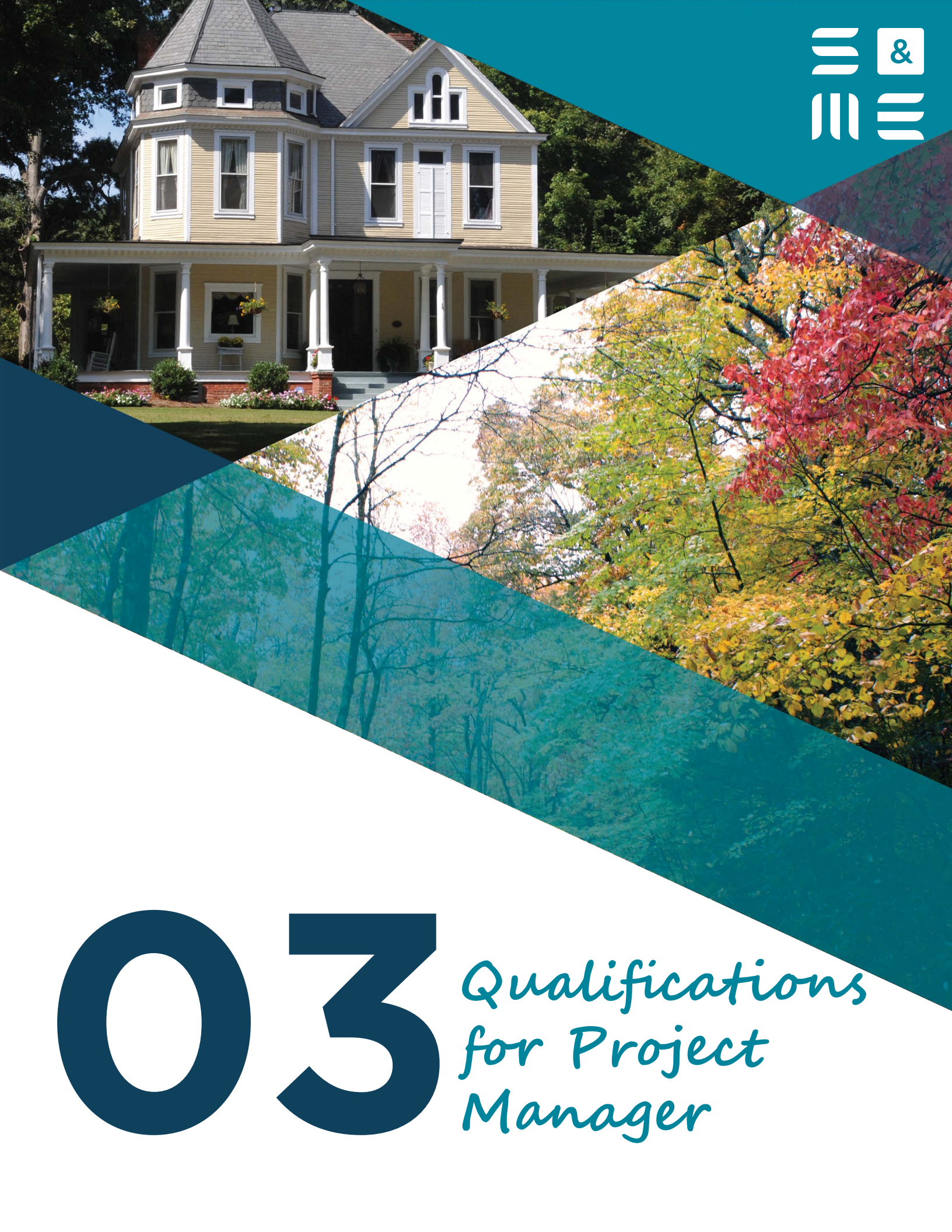
#### Waterfront Master Plan

Urban Designer | Niceville, FL

A 5-acre development master plan, Niceville Landings, in the historic waterfront downtown area of the City and part of the City's Community Redevelopment Area.

- Lead designer for preparing the Waterfront Master Plan
- Prepared project cost estimates





# 03

*Qualifications  
for Project  
Manager*



## PROJECT MANAGER DESCRIPTION/PROJECTS

We have selected Sarah Sinatra Gould as the Project Manager. Sarah has over 18 years of planning and has served as a planning director for numerous jurisdictions throughout her career. She has worked on many full comprehensive plan rewrites, an initial comprehensive plan for a newly incorporated municipality, as well numerous land use plan amendments. In her role, she has led public engagement sessions that strive for participation throughout all segments of a community. Sarah is currently working on the Comprehensive Plan update for the City of Trinity, NC and is wrapping up a land use plan update for Effingham County, GA. She worked with Wake Forest, NC to do an interpretation of NC GS 160-D and facilitated an internal department meeting for the Town. Previously, she prepared full Comprehensive Plan rewrites for the Town of Surfside as well as the City of Weston, in 2010 and in 2017, the links to these projects are provided.



**VISION PLAN - Robertson County, TN**

[Social Pinpoint Link](#)

**LAND USE PLAN UPDATE - Effingham County, GA**

[Social Pinpoint Link](#)

**MUNICIPAL ZONING & DEVELOPMENT ORDINANCE UPDATE -**

Hardeeville, SC

[Social Pinpoint Link](#)

**COMPREHENSIVE PLAN - Trinity, NC**

[Social Pinpoint Link](#)

**COMPREHENSIVE PLAN - City of Weston, FL**

[Plan Link](#)

**COMPREHENSIVE PLAN - Town of Surfside, FL**

[Plan Link](#)

# SARAH SINATRA GOULD

## AICP

### PROJECT MANAGER



18 Years of Experience

AICP #021553

Raleigh, NC



### PROFILE

Sarah has served as a planning director for numerous jurisdictions throughout her career. She understands the need to actively engage the public through a variety of platforms to truly gauge a community's needs. Sarah's work products include innovative plans that result from community feedback and collaboration.

### EDUCATION

- Master of Urban & Regional Planning, Florida Atlantic University, Fort Lauderdale, FL, 2003
- Bachelor of Arts, Political Science, Florida Atlantic University, Boca Raton, FL, 2001

### SKILLS

- Land Development Codes
- Comprehensive Planning
- Public Involvement
- Corridor Analyses
- Development Review
- Sign Codes
- Supplemental Planning Support

### EXPERIENCE

#### Land Use Update

Project Manager | Effingham County, GA

A 2040 planning horizon to update the Land Use Plan to be in line with current conditions as well as develop character areas.

- Facilitated public engagement sessions including stakeholder meetings and community workshops
- Coordinated update of character area descriptions & map

#### Comprehensive Plan Update

Project Manager | Trinity, NC

An update to the Comprehensive Plan with a focus on public engagement.

- Prepared a survey/fact-finding information housed on a project website: [Click Here](#)
- Moderated a stakeholder's meeting for steering committee input on the vision
- Branded the project VisionTrinity
- Structured an open house for public input

#### Vision Plan

Project Manager | Robertson County, TN

A community engagement effort to determine if changes were needed for the County's 2013 Growth Plan. This included significant public input to prepare a Vision Plan for the County.

- Moderated four stakeholder meetings
- Prepared a survey/fact-finding information housed on a project website: [Click Here](#)
- Structured a two-day open house for public input

#### Comprehensive Plan Update and Amendments

Project Manager | Weston, FL

Update of initial Comprehensive Plan followed up with a subsequent update to be consistent with local and state regulations.

- Identified items of concern and provided consistency with state statutes
- Prepared a matrix of changes needed under the statutes



# SARAH SINATRA GOULD

## AICP

### EXPERIENCE CONTINUED

#### Comprehensive Plan Update and Amendments

Project Manager | Surfside, FL

Update of the Comprehensive Plan with public engagement sessions.

- Identified items of concern
- Evaluated potential density changes and revised thresholds
- Provided an analysis on tourist/hotel uses
- Added resiliency and sea level rise initiatives

#### West Park Transit Oriented Corridor

Project Manager | West Park, FL

Amended the City and County Land Use Plans to create a Transit Oriented Corridor (TOC) for the City of West Park.

- The designation provided 575,000 square feet of office space, 500,000 square feet of commercial area, 200 hotel rooms and 1,500 new residential units to a depressed portion of US 441/SR7
- Prepared accompanying design guidelines to encourage development that is sensitive to the corridor and focused on multiple users
- Crafted land development code language to include pedestrian amenities and design components

#### NC Statute Interpretation Report

Project Manager | Town of Wake Forest, NC

Prepared analysis of NC General Statutes 160D relating to the building and zoning permitting process.

- Moderated a meeting of department heads
- Prepared an analysis relating to the certificate of use process and allowances under 160D

#### Form-Based Code

Project Manager | North Bay Village, FL

Integrated form-based principles, including requirements for design into a new zoning ordinance for the Village.

- Developed building height and density bonuses with associated graphics
- Incorporated complete streets and baywalk requirements to improve the landscape as properties redevelopment
- Presented the project to the Planning and Zoning Board and Village Commission with feedback from the public

#### Corridor Analysis

Project Manager | Surfside, FL

Prepared new zoning language and a comparison of existing conditions in an effort to stay ahead of the new construction.

- Prepared criteria to help guide future development into the desired development pattern
- Included an analysis of lot aggregation potential and ownership
- Facilitated multiple public engagement sessions



# 04

*Statement of Approach*





### APPROACH

The three phases outlined in the RFP can be achieved through the following themes: **Analyze the Data, Engage the Community, and Create a Plan.** We offer these themes as a high-level description of the S&ME approach to the Weddington Comprehensive Plan & Downtown Master Plan.

#### PHASE 1: ANALYZE THE DATA

The S&ME team, will facilitate a kickoff meeting with Town staff to review the project timeline, schedule meetings, and begin the process of data acquisition. We will review existing plans, maps, documents, data, and other materials relevant to the project. This review will include the 2012 Land Use Plan and its amendments and the 2015 Downtown Overlay District. S&ME will review public facilities and community assets (transportation, utilities, public parks, and open space) to understand their current state and any potential deficiencies. This analysis will document service providers and their future plans for improvements. This analysis will lead to an understanding of the design and function of the Town's transportation network, the effects of population fluctuation throughout the year on traffic patterns, the adequacy of various transportation modes (complete streets, pedestrian, bicycle, and public transportation), and the effect of traffic on neighborhoods and points of interest.

In an effort to clearly understand the existing conditions and factors that will impact the market analysis, our team will review economic and population statistics and identify the drivers that will likely affect future growth in the Town. Typical sources include the US Census Bureau and ESRI Business Analyst Online. S&ME utilizes a robust suite of ArcGIS mapping and spatial analytical tools to support our comprehensive planning activities, research, and deep-dive analysis activities. Our team members utilize GIS tools and extensions in their daily work products, which has equipped our professionals with a strong GIS knowledge base. We also maintain a significant repository of GIS datasets collected from reputable local, regional, state, and national sources. S&ME will coordinate with Town staff to identify the necessary GIS data needed for the Plan update.

In connection with the data collection for the Comprehensive Plan, S&ME will gather data to prepare a market analysis to guide potential recommendations for potential land use revisions to the Town of Weddington's Comprehensive Plan. The analysis will determine if an expansion to the District is needed to support a successful Downtown or if other types of land use changes are needed.

Additionally, Phase 1 will include stakeholder interviews. The S&ME team will conduct initial stakeholder interviews with key elected and appointed officials and staff members. The purpose of these meetings will be to familiarize stakeholders with the project and obtain early input from key members of the Town.

### PHASE 2: ENGAGE THE COMMUNITY

Community engagement is not simply a task, but a fundamental component of the S&ME team's planning process. Local knowledge and experience provide the community trust required for the completion of a successful project.

Our community engagement will run through most of the project timeframe, as detailed in the schedule at the end of this Approach section. Our in-person outreach efforts will be innovative, interactive, and fun.

The S&ME team will work with the Town to refine and finalize an extensive and innovative community engagement program that will provide input from community members of all ages and backgrounds. The following tasks offer an initial plan and starting point for discussion.



**Task 2.1: Project Website** - S&ME will utilize Social Pinpoint®, an online community engagement platform to provide a project website that will engage the community and stakeholders during the development of the Comprehensive Plan and the Downtown Master Plan. This website will provide two-way communication, with the ability to download information and documents as well as solicit and retain public input virtually through state-of-the-art interactive maps and exhibits. This website will be critical in the public engagement process. The site is completely customizable to the Town's needs and will be updated throughout the process to ensure the public is informed and has the opportunity to review and comment on concepts being discussed during the update process. Please find below links to three S&ME project websites.



**Trinity Comprehensive Plan:** [Click Here](#)



**Hardeeville MZDO:** [Click Here](#)



**Sumter County Comprehensive Plan Update:** [Click Here](#)

**Task 2.2: Social Media Campaign Template** - To assist the Town with increasing awareness about the project, the S&ME team can develop a social media campaign template designed to provide Town staff with all the tools, guidance, and expertise needed to develop and maintain a social media campaign for the project across each of the Town's preferred social media platforms. As part of this effort, S&ME would provide a recommended posting schedule, branded and formatted images designed for posting on social media (including five (5) header images, five (5) post images, and five (5) profile images), and assistance in drafting the messaging for each post.



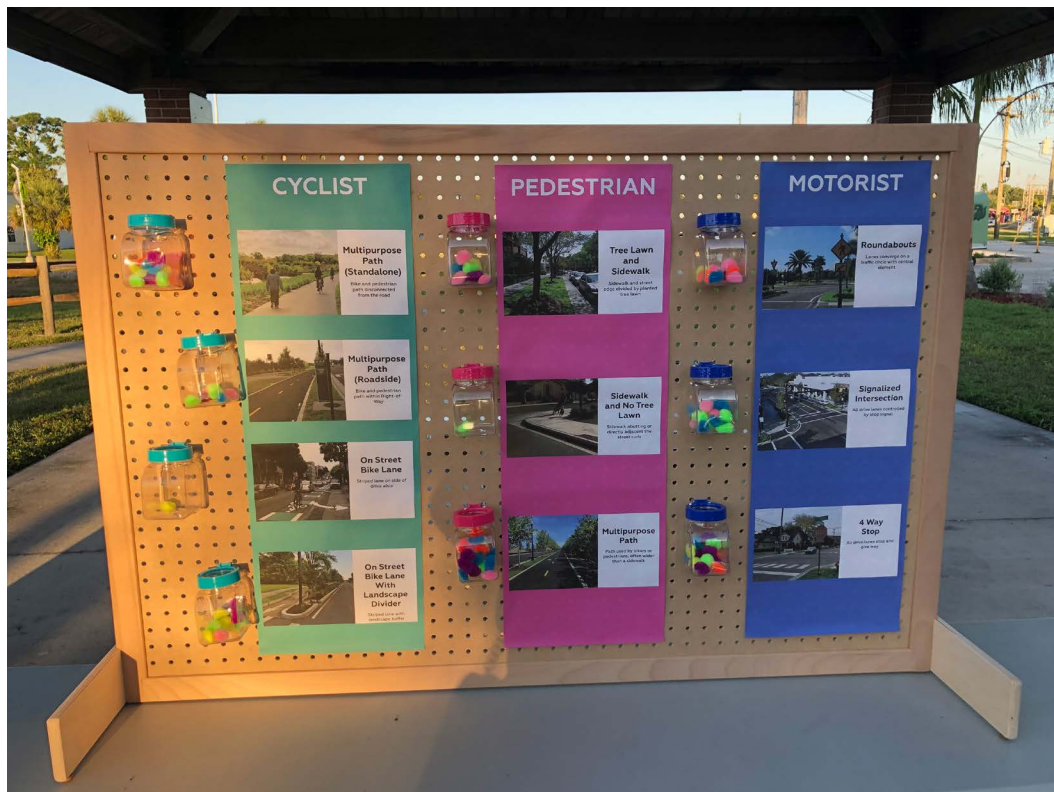


**Task 2.3: Advertising Materials** - the S&ME team will work with Town staff to develop a flyer to promote upcoming public input opportunities and business cards highlighting the project website. Up to one (1) round of revisions for these materials will be performed upon request by staff. To increase awareness of the project, staff should plan to disseminate these materials to elected officials, on reception desks at Town services buildings, at local events, and within popular local venues.

**Task 2.4: Stakeholder Meeting 1** - The S&ME team will facilitate a meeting with the Stakeholder Committee, intended to establish the goals and objectives for the process of drafting the Comprehensive Plan and to obtain input on issues facing the community.

**Task 2.5: Public Workshop** - The S&ME team will hold a public visioning workshop. At this workshop, S&ME will present an overview of the project scope and an overview of the data collected, followed by a forum that allows for input from attendees. At the workshop, S&ME will guide discussion on land use relating to the Comprehensive Plan

as well as focus a portion of the meeting on the vision for Downtown. The meeting will include a hands-on exercise where participants will be asked by facilitators to depict their ideas or vision for the Town on base maps. The information and knowledge collected at this meeting will inform preparation of the Comprehensive Plan and provide the S&ME team with knowledge of community priorities and issues.



**Task 2.6: Public Open House** - The public open house will occur over a two-day period and is intended to be focused on the vision for Weddington. Our team will have stations set up to engage the public through the following setup:



### STATION 1: GREETERS

This will include a sign-in sheet and someone to greet people and explain the organization of the room. Our team always includes an activity for children as we encourage all members of the community to attend and participate.

### STATION 2: TELL US WHERE YOU LIVE, WORK, SHOP, AND PLAY!

This will include a blank base map of the Town for attendees to indicate where they live, where they work, and where they do recreational activities with colored stickers.



### STATION 3: DEVELOPMENT MAP

In this activity, participants will be asked where and what kind of development they would like to see by placing colored stickers on the map.

### STATION 4: IMPROVEMENT PRIORITIES

This is designed to allow people to rank their preferences in particular categories. This could be relating to utilities, transportation, housing, or other categories tailored to the needs of Weddington. This would be guided by the discussions and feedback during the stakeholder meeting. Participants can vote for their favorite option in each category by placing a button in the jar next to their preference. The buttons would be tallied up at the end of each day to determine which option under each category had the most votes. This exercise can help identify the challenges and needed improvements as identified by the public.



### STATION 5: CHALLENGES AND OPPORTUNITIES

This would include questions specific to challenges and opportunities participants want to see in the Town, which would be determined after the stakeholder meeting.

### STATION 6: IDEA WALL

Finally, a prompt would be posted for participants to contribute to what they see as their vision for the next 20 years for Weddington.



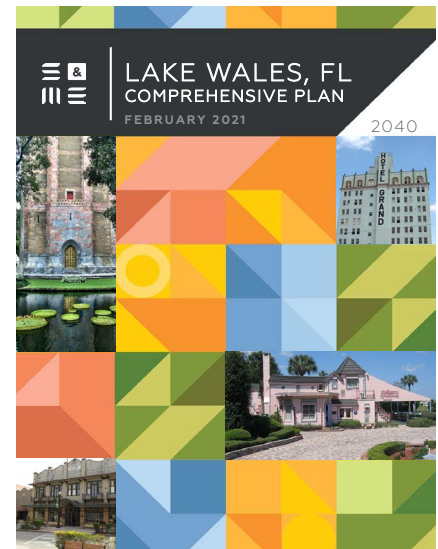
### STATION 7: EXIT SURVEY

Before leaving, participants will be asked to fill out an exit survey which asked how the activities went and for any further comments or suggestions.

### PHASE 3: CREATING A PLAN

S&ME will prepare a draft and then a final version of the Comprehensive Plan and Downtown Master Plan, after staff review and comments. To keep the project on schedule and to answer questions that may arise, our team finds it very useful to schedule 30-minute bi-weekly meetings and support the Town's initiative by including this in management goals for the project. This is very effective as it is an opportunity to touch base and allows both parties to provide feedback and direction. S&ME will rely on Town staff to address the following tasks:

- Assist in the identification of Project Stakeholders
- Reserve facilities for public meetings
- Facilitate the collection of data from various Town Departments
- Schedule and notice public hearings
- Review drafts within the time allotted



**Task 3.1: Prepare the Comprehensive Plan** - S&ME will leverage deep experience in traditional comprehensive planning to deliver a thoughtful and complete Plan with a clear strategy and roadmap for implementation. Through the effective use of maps, renderings, charts, 3D visualization, infographics, and straightforward text, the Comprehensive Plan will clearly demonstrate the history, existing conditions, and desired vision for the Town. The utilization of thoughtful goals will provide a clear and easy-to-understand roadmap for implementation and fulfillment of the vision. Implementation is at the forefront of our strategy development and plan organization. The final document will pair the components of a traditional comprehensive plan with the compelling narrative and format of a master plan. Action items and corresponding metrics will be clear to ensure accountability and plan success, which is fulfillment of the community vision.

**Task 3.2: Prepare the Downtown Master Plan** - S&ME will utilize information gathered in Phases 1 and 2 to develop Concept Plan drawings (hand drawn) showing streets, blocks, buildings, open space (location only), and parking for a new Downtown/Town Center. S&ME will review the initial concept with Town staff and complete up to two (2) rounds of plan revisions. The Final Concept Plan will include the following information: tabulations (square feet of each use, number of dwelling units by type, building heights, and parking), explanatory diagrams, and precedent images to describe key elements of the plan.

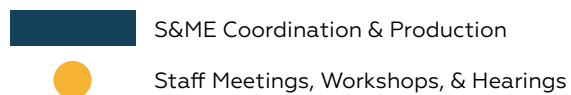
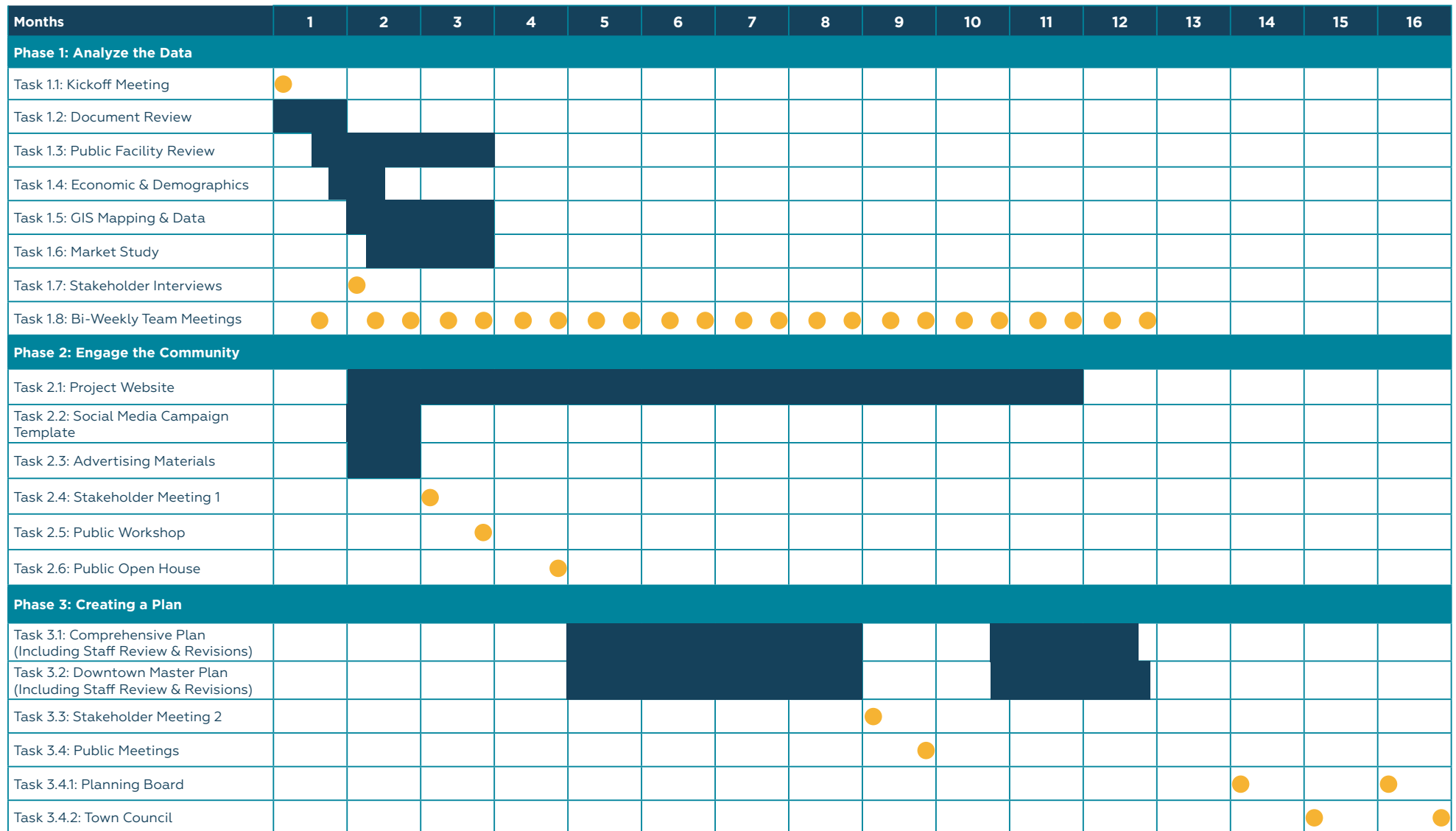
Upon completion of the Concept Plan, S&ME will coordinate with Town staff to develop an Implementation Strategy. This effort will include the identification of projects that have the highest potential to catalyze private sector investment for redevelopment and identify potential order of magnitude costs and potential funding sources.

Lastly, S&ME will combine the Concept Plan and Implementation Strategy into a draft master plan report. S&ME will facilitate one (1) virtual review meeting with Town staff to include a “page turn” of the document to obtain client feedback. S&ME will also provide copies of the document to Town staff for subsequent review and comment. Based upon the comments received, S&ME will complete one (1) round of revisions and deliver a final master plan report.

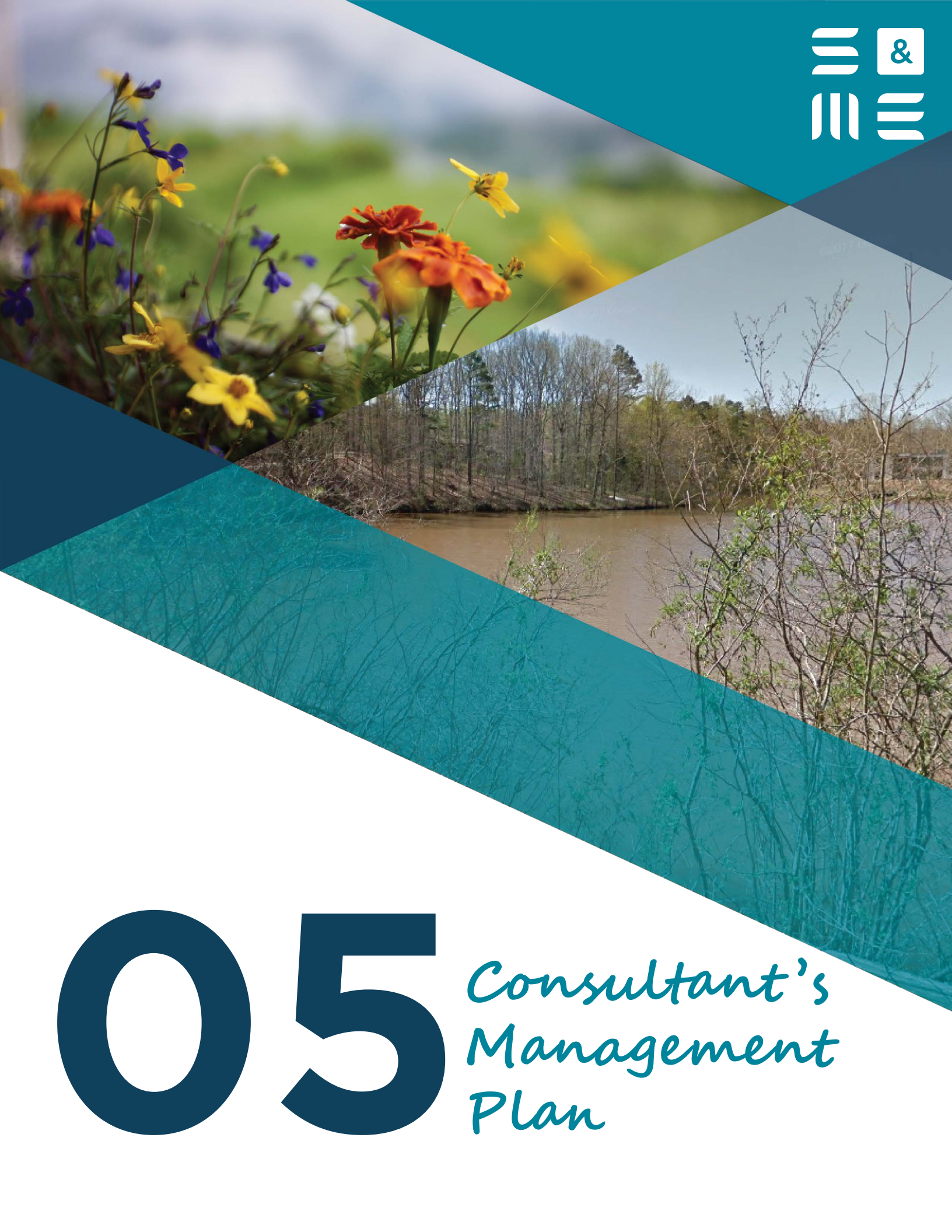
**Task 3.3: Stakeholder Meeting 2** - The S&ME team will facilitate a second meeting with the Stakeholder Committee to evaluate the public engagement feedback and discuss the final recommendations.

**Task 3.4: Public Meetings** - The S&ME team will present the draft Plans to the Planning Board and Town Council, and upon evaluation, present the Final Plans to both Boards again.

## 04 | STATEMENT OF APPROACH







# 05

*Consultant's  
Management  
Plan*

## MANAGEMENT PLAN

A detailed description of the proposed staff and roles/responsibilities are included on the organizational chart included in the Qualifications and Management Plan sections of this response.

S&ME will manage the overall project, the coordination of our team, and all project activities, including meetings, workshops, and public hearings. S&ME **Project Manager Sarah Sinatra Gould, AICP**, will serve as the primary point of contact for this effort and be in regular communication with the Town's designated Project Lead. Sarah will attend all client meetings as the Project Manager and ensure seamless integration between the projects, communication, and invoicing.

We understand that S&ME will be responsible for all of the items listed under the Project Management section of the RFP including GIS Mapping, electronic copies of event promotion materials, staffing and supplies for community engagement activities, creation and maintenance of online content (project website), bi-weekly meetings, and written status reports.

### Project Schedule

A strong project management system is a foundational element of S&ME's Placemaking practice. The project schedule included in our RFP response, will be reviewed at the kickoff meeting and updated as needed. The project schedule is an important project management tool that will be utilized at every project meeting, including the bi-weekly update meetings.

### Communication

Clear and consistent communication between our Project Manager and the Town's Project Lead is essential to a successful planning process and final Plans. Bi-weekly team meetings will ensure regularly scheduled opportunities for coordination through the length of the project. Sarah will also be available through email and her mobile phone as needed. Responsiveness and client service is a hallmark of S&ME.

### Availability of Staff Resources

S&ME is fortunate to have a deep and experienced Planning staff. However, proactive work planning is essential to our ability to deliver successful projects on-time and within budget. The entire S&ME Planning team meets every week to discuss project needs, deadlines, and individual workloads. As **Vice President of Placemaking** at S&ME and **Principal-in-Charge** for this effort, **George Kramer, AICP**, will ensure that appropriate labor resources are provided for the timely and successful completion of this project.

### Quality Assurance

Quality is one of S&ME's core values. The foundation of our Quality Assurance is our Senior Reviewer program. A Senior Reviewer is a senior member of the S&ME team that has been trained and internally certified to review technical deliverables and contracts.

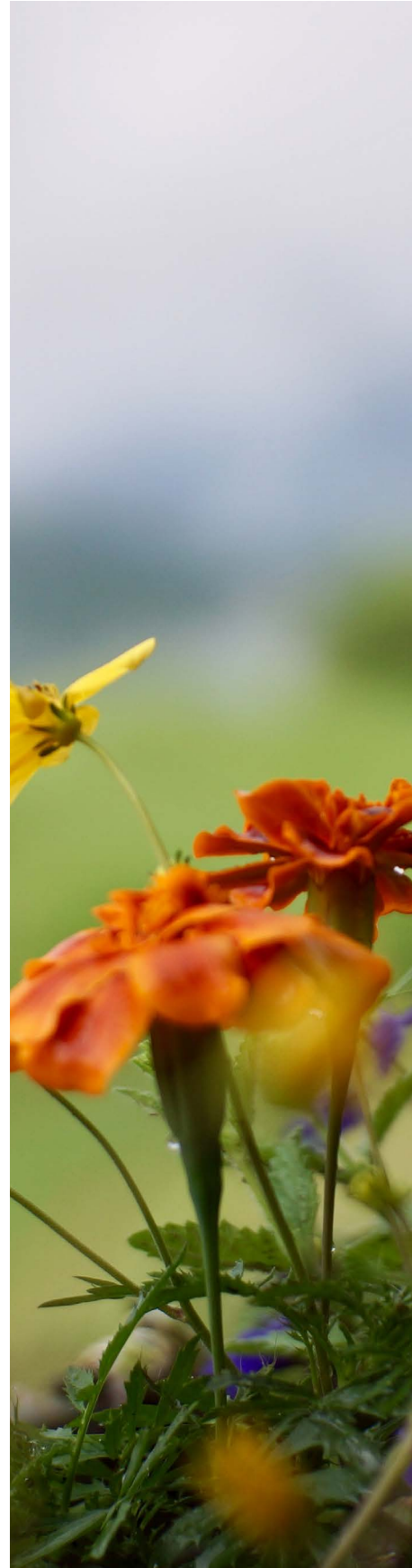


Since its inception, S&ME has worked to create a company culture of providing high-quality, technically sound, relevant solutions that deliver value to our clients. Quality is an attribute that consistently guides our actions and supports efforts to distinguish S&ME from our competitors. With S&ME, quality is not something added at the end of a project; rather, it is an integral part of our services, from start to finish. Recognizing that quality starts at the top, the S&ME Board of Directors acknowledges and confirms the company's commitment to and responsibility for our Quality Policy, and in turn charges all levels of leadership to support and implement the Quality Policy.

### Policy Statement

It is the policy of S&ME, Inc. (S&ME) that:

1. All written correspondence (proposals, reports, letters, SOQs, marketing documents, etc.) will be reviewed by a Senior Reviewer
2. All technical communications (including emails) which set forth professional recommendations, conclusions, opinions, plans, and specifications shall be authored and edited by at least two individuals of which at least one is a Senior Reviewer
3. Every project, regardless of size, fees, or services performed, will have a designated Project Senior Reviewer who will exercise technical authority over all aspects of the project
4. The Project Senior Reviewer will be selected based on their familiarity with the technical subject matter involved and other considerations
5. If the Project Senior Reviewer has to be replaced on a project, the replacement Project Senior Reviewer will be selected based on the same criteria as listed above. The replacement Project Senior Reviewer is responsible for becoming familiar with the project to be able to properly provide senior review
6. If portions of a project extend beyond the Project Senior Reviewer's area of technical expertise the Project Senior Reviewer is responsible for obtaining technical input of another Senior Reviewer(s) with the proper expertise. The Project Senior Reviewer retains the overall responsibility for all technical aspects of the project. The involvement and contribution of other Senior Reviewer(s) should be documented in the project file
7. When the company starts a new service line and no Senior Reviewers are yet available to provide technical review, or a specialized service is included in a project that is outside the technical expertise of any Senior Reviewers, the Project Manager will contact the Quality Improvement Director to identify a Senior Reviewer, Technical Principal, or external resource to provide technical direction/Senior Review
8. The Quality Improvement Director is responsible for administering this policy and the process for nominating and approving candidates



ORGANIZATION CHART



Sarah Sinatra Gould, AICP  
Project Manager



George Kramer, AICP, LEED AP  
Principal-in-Charge

PLANNING



Patricia Tyjeski, AICP  
Senior Reviewer



Chris Dougherty, AICP  
Senior Planner/GIS Specialist



Nick Hill, AICP  
Planner/Master Plan Specialist



Katie Martin, AICP  
Planner/GIS Specialist



Laura Canary, CEcD, FRA-RA  
Redevelopment Planner/Master Plan Specialist

LANDSCAPE ARCHITECTURE/URBAN DESIGN



Carrie Read, PLA, ASLA, LEED AP  
Senior Landscape Architect



Grace Zhang, AICP  
Urban Designer

PUBLIC OUTREACH/GRAPHIC DESIGN



Regan Buchanan  
Planner/Outreach Specialist



Jalisa Harris, AICP  
Planner/Outreach Specialist



Em Schaefer  
Senior Graphic Designer/Outreach Specialist

TRANSPORTATION/COMPLETE STREETS



Kelly Farabee, PE, PTOE, RSP1  
Transportation/Complete Streets Engineer



Terry McKloski, AICP  
Senior Transportation/Complete Streets Planner

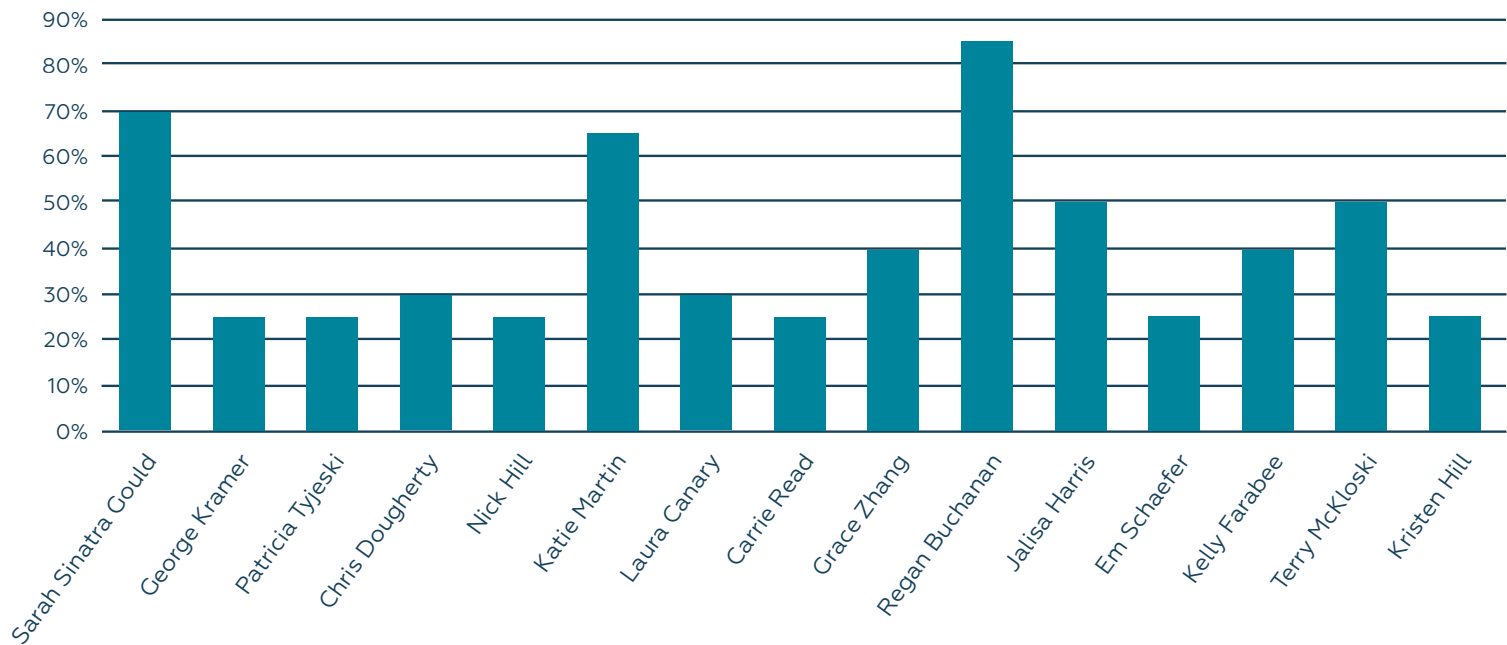
ENGINEERING



Kristin Hill, PE, PG  
Public Facilities Engineer

STAFF AVAILABILITY

Availability Table







# 06

*References*



# EFFINGHAM COUNTY PLANNING CONSULTANT FOR DEVELOPMENT SERVICES CODE REVISIONS

📍 EFFINGHAM COUNTY, GA



## DATES

2021 - Ongoing



## OWNER/CLIENT

Effingham County, GA,  
Tim Callanan, County  
Manager  
804 South Laurel Street,  
Springfield, GA 31329  
T: 912.754.2111  
E: Tcallanan@  
effinghamcounty.org



## KEY PERSONNEL

- Sarah Sinatra Gould
- Jalisa Harris
- Katie Martin
- Chris Dougherty
- Em Schaefer

S&ME is currently working on an update to Effingham County's Comprehensive Plan and an overhaul of its land development regulations. This update will be focused on streamlining requirements, while conducting substantial public engagement efforts, including facilitating stakeholder meetings made up of appointed officials, County Administration, staff of key County departments, members of relevant County boards and commissions, landowners, developers, realtors, design and construction professionals, neighborhood groups, business owners, and others.



## OVERVIEW

- Preserving the agricultural history of the community
- Crafting clear regulations to guide future development
- Reinstating character areas to define the look and feel of future development
- Identifying development nodes to determine areas of growth within the County
- **Social Pinpoint website:** [Click Here](#)



# COMPREHENSIVE PLAN/DOWNTOWN STREETScape

LAKE WALES, FL



## DATES

2020 - 2021 (CP & Streetscape Design) |  
2021 - 2022 (Streetscape Construction)



## OWNER/CLIENT

City of Lake Wales,  
FL, Autumn Cochella,  
Development Services  
Manager  
201 West Central Avenue,  
Lake Wales, FL 33853  
T: 863.678.4182 ext. 229  
E: Acochella@lakewalesfl.gov



## KEY PERSONNEL

- Chris Dougherty
- Katie Martin
- Em Schaefer



Since 2017, S&ME has partnered with the City of Lake Wales in the planning and design of this historic city. From the macro-level planning to the micro-level of downtown construction documents, this partnership has been focused on implementation and community revitalization.

S&ME updated the **Comprehensive Plan** to address the significant growth within the City. The Plan was guided by a steering committee made up of local business leaders, social activists, developers, and architects and a well-attended public involvement process incorporating Zoom virtual workshops and meetings to engage the community.

S&ME also developed **Streetscape Plans** for the transformation of **Downtown's** Park Avenue. The new design balances the auto-dominated street by converting the oversized one-way street with angled parking into a 2-way street with parallel parking. This gesture makes room for broad sidewalks and planters to accommodate street trees and colorful plantings in order to advance the Olmsted Brothers' vision of a "City within a Garden". The street has been designed as a curbless street allowing for barrier free pedestrian access and flexibility for outdoor dining and events.



## OVERVIEW

- High growth City with outdated Plan
- Architecturally significant community
- Focus on public engagement
- Landscape architecture
- Advanced the Olmsted Brothers's vision of a "City within a Garden"
- The design also includes removal of turn lanes at SR 17 (Scenic Highway) and at 1st Street
- **Video:** [Click Here](#)

# COMPREHENSIVE PLAN/DOWNTOWN MASTER PLAN

📍 GREEN COVE SPRINGS, FL



## DATES

2021 - 2022 (CP) | 2022 (DMP)



## OWNER/CLIENT

City of Green Cove Springs, FL, Michael P. Daniels, Green Cove Springs Planning & Zoning Director  
321 Walnut Street, Green Cove Springs, FL 32043  
T: 904.297.7500  
E: Mdaniels@greencovesprings.com



## KEY PERSONNEL

- Patricia Tyjeski
- Chris Dougherty
- Nick Hill
- Terry McKloski
- Em Schaefer
- George Kramer
- Laura Canary



S&ME was hired in 2021 to update the City's **Comprehensive Plan** to address the construction of the First Coast Expressway, annexations, efforts to revitalize the downtown, future actions to protect the City's historic sites, urban form along major transportation corridors, complete streets, and introduction of mobility strategies.

S&ME was hired in 2022 to develop a **Downtown Master Plan**. The planning process included an interactive project website and a week-long design charrette that included public workshops/presentations and targeted stakeholder engagement. The final deliverables included a new brand/logo and a Final Plan featuring 3D graphics that provide a clear and compelling visualization of a revitalized Downtown.



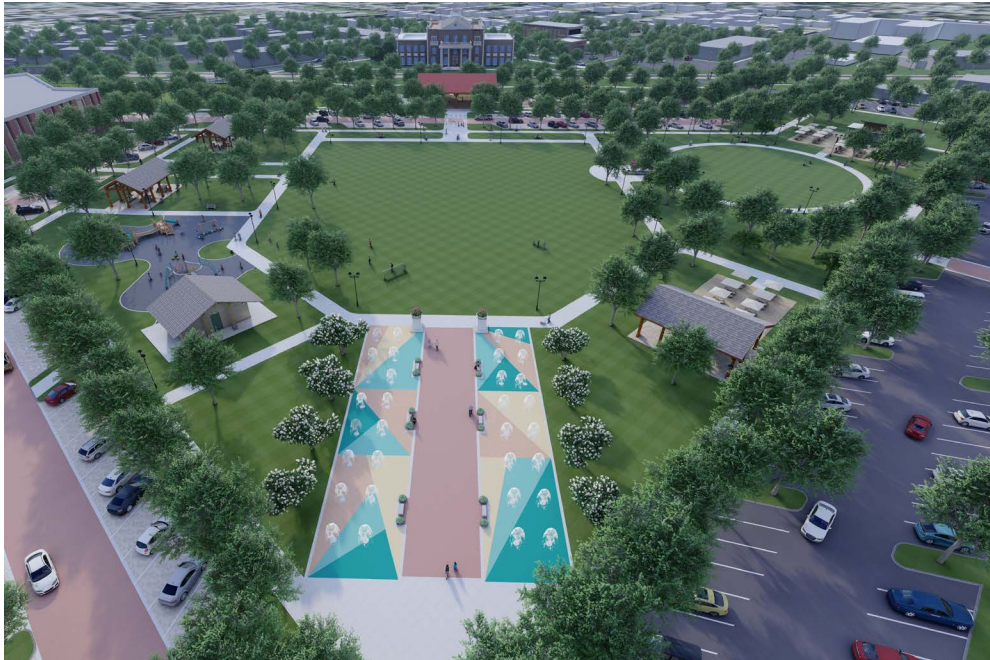
## OVERVIEW

- Prime Consultant
- Updated the Future Land Use and Transportation Elements of the City's Comprehensive Plan to address changes in local conditions since the last update
- Utilized Social Pinpoint to facilitate public input through a survey, an interactive map to gather location specific comment
- Real Estate Market Analysis
- Parks and Open Spaces Design
- **DMP Style Guide:** [Click Here](#)



# CITY CENTER PLAN

 PINELLAS PARK, FL



## DATES

2021



## OWNER/CLIENT

City of Pinellas Park,  
FL, Nick A. Colonna,  
Community Development  
Administrator  
5141 78th Avenue North,  
Pinellas Park, FL 33781  
T: 727.369.5680  
E: Ncolonna@pinellas-  
park.com



## KEY PERSONNEL

- George Kramer
- Em Schaefer
- Laura Canary
- Carrie Read



After experiencing rapid growth in recent years, the City of Pinellas Park, currently suburban in nature and lacking a traditional downtown, selected S&ME to develop a physical place reflective of the residents' deep sense of community. The project commenced with an interactive project website to garner public input and support as well as provide project updates. Additionally, S&ME hosted a week-long charrette including public workshops/presentations and targeted stakeholder engagement. The final deliverables included a Final Plan as well as 3D graphics and a fly-through video to provide the community with a clear and compelling visualization of the potential future. The Plan was developed with a focus on implementation and includes detailed project phasing and infrastructure cost estimates.



## OVERVIEW

- Urban Design & 3D Visualization
- Complete Streets
- Branding/Logo Development
- Real Estate Market Analysis
- Parks & Open Spaces Design
- **Plan Video:** [Click Here](#)
- **Full Report:** [Click Here](#)
- **Style Guide:** [Click Here](#)

# ROBERTSON COUNTY VISION PLAN

📍 ROBERTSON COUNTY, TN



## DATES

2022 - Ongoing



## OWNER/CLIENT

Robertson County, TN,  
Margot Fosnes, Chief  
Economic Development  
Officer  
405 West Court Square,  
Springfield, TN 37172  
T: 615.384.3800  
M: 615.308.3380  
E: Mfosnes@  
growinrobertson.com



## KEY PERSONNEL

- Sarah Sinatra Gould
- Regan Buchanan
- Chris Dougherty
- Katie Martin
- Patricia Tyjeski
- Em Schaefer



Robertson County adopted their Comprehensive Growth Plan in 2013. The Growth Plan and corollary Vision Plan Map are proving effective, but with recent growth and changes within the County, updating the current plan may help to meet the needs of County residents and businesses. The purpose of the Robertson County Vision Plan project is to engage with the community to understand their vision for the future of the County's growth and whether the Growth Plan should be updated. The project revolves around extensive public and stakeholder engagement.



## OVERVIEW

- Four stakeholder interview meetings with approximately 20 participants at each session
- Two-day open house for public input
- Vision Plan determining next steps
- **Social Pinpoint Website:** [Click Here](#)



# COMPREHENSIVE PLAN/DOWNTOWN MASTER PLAN

 FORT PIERCE, FL



## DATES

2019 (CP) | 2022 (DMP)



## OWNER/CLIENT

City of Fort Pierce,  
FL, Shyanne Harnage,  
Economic Development  
Director  
100 North U.S. 1 Fort  
Pierce, FL 34950  
T: 772.467.3034  
E: Sharnage@  
cityoffortpierce.com



## KEY PERSONNEL

- Chris Dougherty
- Patricia Tyjeski
- Nick Hill
- Terry McKloski
- George Kramer
- Jalisa Harris
- Carrie Read
- Grace Zhang

Fort Pierce has a rich history in agriculture and deep sea fishing. In sharp contrast to the rapid and dense population growth experienced in communities further south, the City has maintained its small-town character.

In 2019 S&ME commenced an update of the City's outdated **Comprehensive Plan**. S&ME updated the future land use map to be consistent with past amendments and sea level rise. S&ME amended the Coastal Management Element to reduce flood risks in coastal areas and to encourage the use of strategies that will result in the removal of coastal property from FEMA flood zone designations.

In 2022, S&ME was hired by the City to develop a **Downtown Master Plan**. The planning process included an interactive project website and a four-day design workshop. The plan is focused on implementation and seeks to leverage an abundance of City-owned waterfront property, to promote a vibrant and walkable mixed-use



## OVERVIEW

- Prime Consultant
- Coastal community with outdated Comprehensive Plan
- Focus on sea level rise and peril of flood additions
- Use of coastal mapping to reduce flooding risks
- Public Engagement
- Community Planning
- Urban Design & 3D Visualization
- Complete Streets
- Branding/Logo Development
- Parks & Open Spaces Design
- **Social Pinpoint Website:** [Click Here](#)





# 07

## *Cost Proposal*

TASKS	Vice President	Project Manager	LA Director	Senior Planner	Senior Transportation Planner	Senior Engineer	Planner	Senior Graphic Designer	
	\$250	\$220	\$245	\$150	\$185	\$185	\$115	\$130	
Task 1: Analyze the Data									
Sub-Total	\$500	\$5,280	\$1,960	\$900	\$0	\$0	\$5,635	\$2,600	\$16,875
Task 2: Engage the Community									
Sub-Total	\$500	\$9,240	\$9,800	\$3,000	\$0	\$0	\$9,200	\$2,600	\$34,340
Task 3: Creating a Plan									
Sub-Total	\$500	\$30,360	\$19,600	\$5,400	\$2,960	\$2,960	\$23,000	\$0	\$84,780
Total Hours Budgeted	6	204	128	62	16	16	329	40	\$135,995
TOTAL COSTS	\$1,500	\$44,880	\$31,360	\$9,300	\$2,960	\$2,960	\$37,835	\$5,200	\$135,995





# 08

*Firm Licenses  
& Insurance*

## NC LICENSE



# NORTH CAROLINA

## Department of the Secretary of State

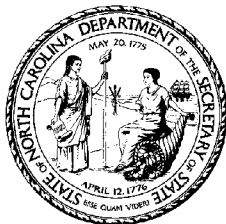
### CERTIFICATE OF EXISTENCE

I, ELAINE F. MARSHALL, Secretary of State of the State of North Carolina, do hereby certify that

**S&ME, INC.**

is a corporation duly incorporated under the laws of the State of North Carolina, having been incorporated on the 3rd day of June, 1963, with its period of duration being Perpetual.

I FURTHER certify that, as of the date set forth hereunder, the said corporation's articles of incorporation are not suspended for failure to comply with the Revenue Act of the State of North Carolina; that the said corporation is not administratively dissolved for failure to comply with the provisions of the North Carolina Business Corporation Act; that its most recent annual report required by N.C.G.S. 55-16-22 has been delivered to the Secretary of State; and that the said corporation has not filed articles of dissolution as of the date of this certificate.



Scan to verify online.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 4th day of May, 2022.


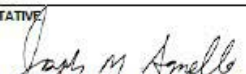
*Elaine F. Marshall*

Secretary of State

Certification# 113535766-1 Reference# 18742710- Page: 1 of 1  
Verify this certificate online at <https://www.sosnc.gov/verification>



## NC INSURANCE

		<b>CERTIFICATE OF LIABILITY INSURANCE</b>		7/1/2022		DATE (MMDDYYYY) 6/28/2021	
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.							
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).							
PRODUCER Lockton Companies 444 W. 47th Street, Suite 900 Kansas City MO 64112-1906 (816) 960-9000				CONTACT NAME: PHONE (A/C No. Ext): FAX (A/C No.): E-MAIL: ADDRESS:			
				INSURER(S) AFFORDING COVERAGE		NAIC #	
				INSURER A: Lexington Insurance Company		19437	
INSURED 1495229 S&ME INC. 3201 SPRING FOREST ROAD RALEIGH NC 27616				INSURER B:			
				INSURER C:			
				INSURER D:			
				INSURER E:			
				INSURER F:			
COVERAGES		CERTIFICATE NUMBER: 17670387		REVISION NUMBER: XXXXXXXX			
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.							
INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR YWV	POLICY NUMBER	POLICY EFF (MMDDYYYY)	POLICY EXP (MMDDYYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR			NOT APPLICABLE			EACH OCCURRENCE \$ XXXXXXXX DAMAGE TO RENTED PREMISES (Ea occurrence) \$ XXXXXXXX MED EXP (Any one person) \$ XXXXXXXX PERSONAL & ADV INJURY \$ XXXXXXXX GENERAL AGGREGATE \$ XXXXXXXX PRODUCTS - COMPIOP AGG \$ XXXXXXXX \$
	GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:						
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			NOT APPLICABLE			COMBINED SINGLE LIMIT (Ea accident) \$ XXXXXXXX BODILY INJURY (Per person) \$ XXXXXXXX BODILY INJURY (Per accident) \$ XXXXXXXX PROPERTY DAMAGE (Per accident) \$ XXXXXXXX \$ XXXXXXXX
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE			NOT APPLICABLE			EACH OCCURRENCE \$ XXXXXXXX AGGREGATE \$ XXXXXXXX \$ XXXXXXXX
	DED RETENTION \$						
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	NOT APPLICABLE			PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ XXXXXXXX E.L. DISEASE - EA EMPLOYEE \$ XXXXXXXX E.L. DISEASE - POLICY LIMIT \$ XXXXXXXX
A	PROFESSIONAL LIABILITY	N	N	031565551	7/1/2021	7/1/2022	\$5,000,000 PER CLAIM / \$5,000,000 AGGREGATE
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) RE: FOR INFORMATIONAL PURPOSES ONLY.							
CERTIFICATE HOLDER 17670387 S&ME INC. 3201 SPRING FOREST ROAD RALEIGH NC 27616				CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.			
				AUTHORIZED REPRESENTATIVE 			

© 1988-2015 ACORD CORPORATION. All rights reserved.

ACORD 25 (2016/03)

The ACORD name and logo are registered marks of ACORD





# 09

*Conflict of Interest*



S&ME, Inc. does not have any conflict of interest to the Town of Weddington, NC as part of this solicitation response.





## CONTRACT FOR SERVICES

This Contract for Services ("Contract") is made and entered into to be effective this \_\_\_\_ day of \_\_\_\_\_, 20\_\_ ("Effective Date") between **Town of Weddington ("the Town")** and **S&ME, Inc. ("the Service Provider" or "Designer")**. For and in consideration of the mutual promises set forth in this Contract, the parties do mutually agree as follows:

1. Obligations of the Service Provider - The Service Provider agrees to provide **land use planning** services ("Services") for the purpose of updating the Town of Weddington Land Use Plan (the "Project") as more particularly described in Scope of Services attached hereto and incorporated herein by reference as **Exhibit 1** (the "Scope of Services").

This Contract does not grant the Service Provider the right or the exclusive right to provide specified services to the Town. Similar services may be obtained from sources other than the Service Provider (or not at all) at the discretion of the Town.

The Service Provider shall begin work immediately upon issuance of a written notice to proceed. The Service Provider agrees to perform the Services in a timely, complete, and professional manner and in accordance with the terms and conditions of this Contract. Furthermore, the Service Provider represents and warrants that (i) it is duly qualified and, if required by law, licensed to provide the Services; (ii) it will provide the Services in a manner consistent with the level of care and skill ordinarily exercised by consultants providing similar Services under similar conditions; (iii) it possesses sufficient experience, personnel, and resources to provide the Services; (iv) it shall provide the Services in compliance with applicable laws, statutes, ordinances, codes, orders, rules and regulations; and (v) its reports, if any, shall be complete and accurate.

Service Provider shall furnish all necessary or required professional architectural, engineering, technical and/or administrative services, labor, materials and supplies to fully, timely, and properly complete the Project.

By execution of this Agreement, the Service Provider represents they have the management ability, experience and skill necessary to perform all the Services required of it under this Agreement in connection with the Project and to provide the Services in a timely, orderly, consistent and efficient manner.

Service Provider further represents and warrants it has the skills, capabilities and resources necessary to specifically provide the Services within the contract time as set forth herein.

2. Obligations of the Town. The Town hereby agrees to pay to the Service Provider for the faithful performance of this Contract an amount not to exceed \$135,995.00.

The Town further agrees to pay certain reimbursable expenses that may include but are not necessarily limited to the following: prints, filing fees, transportation, postage, special mailing and deliveries.

All other services not included under the Scope of Services shall be billed at the hourly rates per **Exhibit 2.**

3. The Town's Project Coordinator. **Robert Tefft**, Town Planner/Zoning Administrator, is designated as the Project Coordinator for the Town. The Project Coordinator shall be the Town's representative in connection with the Service Provider's performance under this Contract. The Town has complete discretion in replacing the Project Coordinator with another person of its choosing.
4. Project Manager and Primary Client Contact for the Service Provider. **Sarah Sinatra Gould**, Project Manager, is designated as the Primary Contact for the Service Provider. The Primary Contact is fully authorized to act on behalf of the Service Provider in connection with this Contract.

5. Terms and Methods of Payment. The Town will make payment after invoices are approved on a net 30-day basis. Applicable North Carolina sales tax shall be invoiced as a separate item. Invoices shall be sent to the Town's Chief Finance Officer with a copy to the Town's Project Coordinator. The Town will not pay in advance without the prior approval of the Town's Finance Officer.
6. Standard Terms and Conditions: The Service Provider agrees to the Standard Terms and Conditions set forth as **Attachment A** attached hereto and incorporated herein by reference.
7. Counterpart Execution. This Contract may be executed and recorded in two or more counterparts, each of which shall be deemed an original and all of which, when taken together, shall constitute one and the same instrument. Each party shall be entitled to rely upon executed copies of this Contract transmitted by facsimile or electronic "PDF" to the same and full extent as the originals.

[SIGNATURES ON FOLLOWING PAGE]

**IN WITNESS WHEREOF**, the Town and the Service Provider have executed this Contract on the day and year first written above.

**S&ME, Inc.**

\_\_\_\_\_  
the Service Provider Name



11/30/2022

\_\_\_\_\_  
Signature of Authorized Representative      Date

56-0791580

\_\_\_\_\_  
the Service Provider's Federal Identification #  
[if Contract is with Organization or Social Security Number if individual]

**Town of Weddington**

\_\_\_\_\_  
Town

\_\_\_\_\_  
Signature of Authorized Representative      Date

This instrument has been preaudited in the manner required by the Local Government Budget and Fiscal Control Act.

\_\_\_\_\_  
Signature of Authorized Finance Officer      Date

**Exhibit List:**

Exhibit 1: Scope of Services (RFP issued 09-19-2022, and response from S&ME, Inc. received 10-21-2022)

Exhibit 2: Hourly Rates

Attachment A: Town of Weddington Standard Terms and Conditions



**Attachment A**  
**Standard Terms and Conditions**  
**(Service Contracts)**

1. Contract Documents. The Service Provider's execution of this Contract constitutes an agreement to (i) all terms and conditions set forth or referenced herein, (ii) on any attachments hereto, (iii) any applicable solicitation documentation related to hereto (including without limitation any request for qualifications), and (iv) any other terms and conditions of a written agreement signed by the Service Provider and the Town that deals with the same subject matter (collectively, the "Contract Documents"). The terms and provisions set forth in the Contract Documents shall constitute the entire agreement between the Service Provider and the Town with respect to the purchase by the Town of the Services provided or work performed as described in the Contract Documents. The agreements set forth in the Contract Documents are sometimes referred to herein as the "Contract." In the event of any conflict between any terms and conditions of the Contract Documents, the terms and conditions most favorable to the Town shall control. No additional or supplemental provision or provisions in variance herewith that may appear in the Service Provider's quotation, acknowledgment, invoice, or in any other communication from the Service Provider to the Town shall be deemed accepted by or binding on the Town. The Town hereby expressly rejects all such provisions which supplement, modify or otherwise vary from the terms of the Contract Documents, and such provisions are superseded by the terms and conditions stated in the Contract Documents, unless and until the Town's authorized representatives expressly assent, in writing, to such provisions. Stenographic and clerical errors and omissions by the Town are subject to correction.
2. Nondiscrimination. During the performance of the Contract, the Service Provider shall not discriminate against or deny the Contract's benefits to any person on the basis of sexual orientation, national origin, race, ethnic background, color, religion, gender, age or disability.
3. Conflict of Interest. The Service Provider represents and warrants that no member of the Town or any of its employees or officers who may obtain a direct benefit, personal gain or advantage for themselves or a relative or associate as a result of the Contract, subcontract or other agreement related to the Contract is in a position to influence or has attempted to influence the making of the Contract, has been involved in making the Contract, or will be involved in administering the Contract. the Service Provider shall cause this paragraph to be included in all Contracts, subcontracts and other agreements related to the Contract.
4. Gratuities to the Town. The right of the Service Provider to proceed may be terminated by written notice if the Town determines that the Service Provider, its agent or another representative offered or gave a gratuity to an official or employee of the Town in violation of policies of the Town.
5. No Kickbacks to the Service Provider. The Service Provider shall not permit any kickbacks or gratuities to be provided, directly or indirectly, to itself, its employees, subcontractors or subcontractor employees for the purpose of improperly obtaining or rewarding favorable treatment in connection with a Town contract or in connection with a subcontract relating to a Town contract. When the Service Provider has grounds to believe that a violation of this clause may have occurred, the Service Provider shall promptly report to the Town in writing the possible violation.
6. E-Verification. The Service Provider shall comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes.
7. Indemnification. To the extent caused by Service Provider's negligence, The Service Provider shall indemnify and hold harmless the Town, its officers, agents, employees and assigns from and against all claims, losses, costs, damages, expenses, attorneys' fees and liability that any of them may sustain (a) arising directly or indirectly out of the Service Provider's breach of the terms and conditions of the Contract or (b) relating to (1) death or bodily injury or (2) loss of or damage to real property resulting of Service Provider.
8. Contract Funding. It is understood and agreed between the Service Provider and the Town that the Town's obligation under the Contract is contingent upon the availability of appropriated funds from which payment for Contract purposes can be made. No legal liability on the part of the Town for any payment may arise until funds are made available to the Town's Finance Officer and until the Service Provider receives notice of such availability. Should such funds not be appropriated or allocated, the Contract shall immediately be terminated. the Town shall not be liable to the Service Provider for damages of any kind (general, special, consequential or exemplary) as a result of such termination.

9. Insurance. Unless such insurance requirements are waived or modified by the Town, the Service Provider evidences that it currently has and agrees to maintain during its performance under the Contract the following insurance from one or more insurance companies reasonably acceptable to the Town and authorized to do business in the State of North Carolina: Automobile - the Service Provider shall maintain bodily injury and property damage liability insurance covering all owned, non-owned and hired automobiles. The policy limits of such insurance shall not be less than be \$1,000,000 combined single limit each accident. Commercial General Liability - the Service Provider shall maintain commercial general liability insurance that shall protect the Service Provider from claims of bodily injury or property damage to the extent caused from performance under the Contract. This insurance shall include coverage for contractual liability pursuant to ISO form CG 00 01 04/13. The policy limits of such insurance shall be \$1,000,000 combined single limit each occurrence/annual aggregate. Worker's Compensation and Employers' Liability Insurance - If applicable to the Service Provider, the Service Provider shall meet the statutory requirements of the State of North Carolina for worker's compensation coverage and employers' liability insurance. The Service Provider shall also provide any other insurance or bonding specifically reasonably recommended in writing by the Town or required by applicable law. Certificates of such insurance shall be furnished by the Service Provider to the Town and shall contain the provision that the Town be given 30 days' written notice of any intent to terminate by either the Service Provider or the insuring company. Failure to furnish insurance certificates or to maintain such insurance shall be a default under the Contract and shall be grounds for immediate termination of the Contract.
10. Termination for Convenience. In addition to all of the other rights which the Town may have to cancel this Contract, the Town shall have the further right, without assigning any reason therefore, to terminate the Contract, in whole or in part, at any time at its complete discretion by providing 10 days' notice in writing from the Town to the Service Provider. If the Contract is terminated by the Town in accordance with this paragraph, the Service Provider will be paid for services actually provided up to the date of termination.
11. Termination for Default. The Town may terminate the Contract, in whole or in part, immediately and without prior notice upon breach of the Contract by the Service Provider. In addition to any other remedies available to the Town law or equity, the Town may procure upon such terms as the Town shall deem appropriate, Services substantially similar to those so terminated, in which case the Service Provider shall be liable to the Town for any excess costs for such similar goods, supplies, or services and any expenses incurred in connection therewith.
12. Mediation. If a dispute arises out of or relates to the Contract, or the breach of the Contract, and if the dispute cannot be settled through negotiation, the parties agree to try in good faith to settle the dispute by mediation administered by the American Arbitration Association under its Commercial Mediation Rules before resorting to litigation. Improper Payments. The Service Provider shall assume all risks attendant to any improper expenditure of funds under the Contract. The Service Provider shall refund to the Town any payment made pursuant to the Contract if it is subsequently determined by audit that such payment was improper under any applicable law, regulation or procedure. The Service Provider shall make such refunds within 30 days after the Town notifies the Service Provider in writing that a payment has been determined to be improper.
13. Contract Transfer. The Service Provider shall not assign, subcontract or otherwise transfer any interest in the Contract without the prior written approval of the Town.
14. Contract Personnel. The Service Provider agrees that it has, or will secure at its own expense, all personnel required to provide the Services set forth in the Contract.
15. Contract Modifications. The Contract may be amended only by written amendment duly executed by both the Town and the Service Provider.
16. Relationship of Parties. The Service Provider is an independent contractor and not an employee of the Town. The conduct and control of the work will lie solely with the Service Provider. The Contract shall not be construed as establishing a joint venture, partnership or any principal-agent relationship for any purpose between the Service Provider and the Town. Employees of the Service Provider shall remain subject to the exclusive control and supervision of the Service Provider, which is solely responsible for their compensation.
17. No Pre-Judgment or Post-Judgment Interest. In the event of any action by the Service Provider for breach of contract in connection with the Contract, any amount awarded shall not bear interest either before or after any judgment, and the Service Provider specifically waives any claim for interest.
18. Background Checks. At the request of the Town's Project Coordinator, the Service Provider (if an individual) or any individual employees of the Service Provider shall submit to the Town criminal background check and drug testing procedures.

19. Confidential Information. Employee Personnel Information: If, during the Service Provider's performance of the Contract, Service Provider should obtain any information pertaining to employees of the Town's personnel records, Service Provider agrees to keep any such information confidential and to not disclose or permit it to be disclosed, directly or indirectly, to any person or entity. Other Confidential Information: (a) the Service Provider agrees that it will at all times hold in confidence for the Town all designs, know-how, techniques, devices, drawings, specifications, patterns, technical information, documents, business plans, item requirements, forecasts and similar data, oral, written or otherwise, conveyed by the Town to the Service Provider in connection herewith or procured, developed, produced, manufactured or fabricated by the Service Provider in connection herewith or procured, developed, produced, manufactured or fabricated by the Service Provider in connection with the Service Provider's performance hereunder (collectively, "Information"). The Service Provider shall exercise the same degree of care to prevent disclosure of any Information to others as it takes to preserve and safeguard its own proprietary information, but in any event, no less than a reasonable degree of care. Unless required by law, The Service Provider shall not, without the prior written consent of the Town, reproduce any Information; nor disclose Information to any party; nor use any Information for any purpose other than performance for the benefit of the Service Provider hereunder. Any technical knowledge or information of the Service Provider which the Service Provider shall have disclosed or may hereafter disclose to the Town in connection with the Services or other performance covered by the Contract shall not, unless otherwise specifically agreed upon in writing by the Town, be deemed to be confidential or proprietary information and shall be acquired by the Town free from any restrictions as part of the consideration of the Contract.
20. Intellectual Property. The Service Provider agrees, at its own expense, to indemnify, defend and save the Town harmless from all liability, loss or expense, including costs of settlement and attorney's fees, resulting from any claim that the Town's use, possession or sale of the Services or any goods infringes any copyright, patent or trademark or is a misappropriation of any trade secret.
21. No Third-Party Benefits. The Contract shall not be considered by the Service Provider to create any benefits on behalf of any third party. The Service Provider shall include in all contracts, subcontracts or other agreements relating to the Contract an acknowledgment by the contracting parties that the Contract creates no third-party benefits.
22. Force Majeure. If the Town is unable to perform its obligations or to accept the Services because of Force Majeure (as hereinafter defined), the time for such performance by the Town or acceptance of Services will be equitably adjusted by allowing additional time for performance or acceptance of Services equal to any periods of Force Majeure. "Force Majeure" shall mean any delays caused by acts of God, riot, war, terrorism, inclement weather, labor strikes, material shortages and other causes beyond the reasonable control of the Town.
23. General Provisions. The Town's remedies as set forth herein are not exclusive. Any delay or omission in exercising any right hereunder, or any waiver of any single breach or default hereunder, shall not be deemed to be a waiver of such right or of any other right, breach, or default. If action be instituted by the Service Provider hereunder, the Town shall be entitled to recover costs and reasonable attorney's fees. the Service Provider may not assign, pledge, or in any manner encumber the Service Provider's rights under this Contract, or delegate the performance of any of its obligations hereunder, without the Town's prior, express written consent.
24. Contract Situs. All matters, whether sounding in contract or tort relating to the validity, construction, interpretation and enforcement of the Contract, will be determined in Union County, North Carolina. North Carolina law will govern the interpretation and construction of the Contract.



## MEMORANDUM

**TO:** Mayor and Town Council  
**FROM:** Karen Dewey, Town Administrator/Clerk  
**DATE:** December 12, 2022  
**SUBJECT:** Consideration of 2023 Town Council Meeting Schedule

---

For discussion and consideration, staff has attached a proposed meeting schedule that includes council work sessions on the 3<sup>rd</sup> Monday of the even months, excluding December. Council may approve this, amend it to add or remove meetings, or keep the current schedule as meeting the 2<sup>nd</sup> Monday of every month with the option to call special meetings or amend the regular meeting schedule as needed.

*Attachments:*  
*Draft Regular Meeting Schedule*  
*Draft Work Session Schedule*



**TOWN OF WEDDINGTON**  
**2023 TOWN COUNCIL REGULAR MEETING SCHEDULE \***

**2<sup>ND</sup> MONDAY OF EVERY MONTH**

DATE	TIME	LOCATION
January 9, 2023	7:00 p.m.	Town Hall Council Chambers
RETREAT		To Be Determined
February 13, 2023	7:00 p.m.	Town Hall Council Chambers
March 13, 2023	7:00 p.m.	Town Hall Council Chambers
April 10, 2023	7:00 p.m.	Town Hall Council Chambers
May 8, 2023	7:00 p.m.	Town Hall Council Chambers
June 12, 2023	7:00 p.m.	Town Hall Council Chambers
July 10, 2023	7:00 p.m.	Town Hall Council Chambers
August 14, 2023	7:00 p.m.	Town Hall Council Chambers
September 11, 2023	7:00 p.m.	Town Hall Council Chambers
October 9, 2023	7:00 p.m.	Town Hall Council Chambers
November 13, 2023	7:00 p.m.	Town Hall Council Chambers
December 11, 2023	7:00 p.m.	Town Hall Council Chambers



Proposed Council Work Session Schedule  
 3<sup>rd</sup> Monday of every other month  
 February  
 April  
 June  
 August  
 October

DATE	TIME	LOCATION
January 9, 2023	7:00 p.m.	Town Hall Council Chambers
RETREAT		To Be Determined
February 13, 2023	7:00 p.m.	Town Hall Council Chambers
February 20, 2023		
March 13, 2023	7:00 p.m.	Town Hall Council Chambers
April 10, 2023	7:00 p.m.	Town Hall Council Chambers
April 17, 2023		
May 8, 2023	7:00 p.m.	Town Hall Council Chambers
June 12, 2023	7:00 p.m.	Town Hall Council Chambers
June 19, 2023		
July 10, 2023	7:00 p.m.	Town Hall Council Chambers
August 14, 2023	7:00 p.m.	Town Hall Council Chambers
August 21, 2023		
September 11, 2023	7:00 p.m.	Town Hall Council Chambers
October 9, 2023	7:00 p.m.	Town Hall Council Chambers
October 16, 2023		
November 13, 2023	7:00 p.m.	Town Hall Council Chambers
December 11, 2023	7:00 p.m.	Town Hall Council Chambers



## **MONTHLY CODE ENFORCEMENT REPORT**

### **Active and Closed Cases – November 2022**

1. **675 Weddington Road** - Construction activity and possible commercial construction activity  
Status: Closed
  - Complaint received related to construction activity coupled with possible commercial construction activity. Site was visited on 8/24/22, photos taken and site investigation conducted which confirmed lot was graded and utilized to store commercial construction activity. Courtesy letter issued on 8/24/22, check back date 9/8/22.
  - 9.23.22 - spoke with owner and informed Town will not permit the storage of commercial equipment in residential district. Provided until 10.21.22 to address issues.
  - 12.1.22 - property issues
2. **4909 Beulah Church Road** - Accumulation of debris and conducting business on residential property  
Status: Under Enforcement
  - Complaint received regarding an accumulation of debris in the yard and conducting business on residential property. Site visit on 8/16/22 confirmed presence of violations – site photographed and violations documented. Courtesy letter issued on 8/22/22 with a check back date of 9/6/22.
  - 9.6.22 - Follow-up visit conducted; violations still present. Will work with Town relative to appropriate next steps.
  - 11.30.22 - Site visit confirmed debris and potential business activity still exists. Letter to be issued related to next enforcement steps including fines.
3. **4915 Beulah Church Road** - Debris in the yard  
Status: Under Enforcement
  - Complaint received regarding an accumulation of debris in the yard. Site visit on 8/16/22 confirmed presence of violations – site photographed and violations documented. Courtesy letter issued on 8/22/22 with a check back date of 9/6/22.
  - 9.6.22 - Follow-up visit conducted; violations still present. Will work with Town relative to appropriate next steps.
  - 11.30.22 - Site visit confirmed debris still exists. Letter to be issued related to next enforcement steps including fines.



4. **4416 Glen Oaks Dr - Abandoned Vehicle (truck without a current tag)**  
Status: Under Enforcement
  - Complaint received regarding an abandoned vehicle parked on the street (truck doesn't have a license plate). Site visit on 9/14/22 confirmed presence of violation – site photographed and violations documented. Courtesy letter issued on 9/15/22 with a check back date of 9/30/22.
  - 9.30.22 - Violation still present, truck parked on street without a tag. Will work with Town on appropriate next steps.
  
5. **4208 Waxhaw-Indian Trail Rd - Too many accessory buildings, use of RV for residential purposes, junk vehicle, trash and debris**  
Status: Under Enforcement
  - Complaint regarding too many accessory buildings, use of RV for residential purposes, junk vehicle, trash and debris. Notice of Violation has been prepared and a compliance deadline of July 21, 2022 has been issued.
  - Follow-up site visit conducted on 9/28/22 - junk vehicle, trash and debris and two accessory structures still present. Violations still present, working with Town appropriate next steps.
  
6. **7239 Cobblecreek Dr - Unpermitted accessory structure**  
Status: Under Enforcement
  - Complaint regarding unpermitted “accessory structure”. Site visit was conducted and a meeting with the homeowner was held. Homeowner confirmed that he failed to obtain a permit but agreed to obtain the permit. The owner has submitted the permit and is working with the Zoning Administrator to submit final documentation.
  
7. **1408 Highland Ridge Ct - Accessory building constructed without permit**  
Status: Under Enforcement
  - Complaint regarding “Accessory Building” constructed without permit. Met owner on site on 2/3/22. Owner stated he wasn't aware a permit was required and agreed to obtain permit immediately. Courtesy Letter dated 2/4/22 was issued requesting owner obtain a permit and requesting meeting on site on 2/11/22. Met owner at site. Explained permit process. Conducted side-yard set-back measurements. Building appears to violate required setback requirement.
  - Site visit 4/11/22 building has not been relocated. Owner hiring surveyor to identify property lines to assist with relocation of building. Owner has agreed to relocate building to rear yard area and is obtaining a “new” permit for building relocation.



8. **233 Weddington Rd** - construction of accessory building without an approved permit  
Status: Under Enforcement
  - Complaint filed regarding construction of an “Accessory Building” without a permit. Conducted site visit. Met owner at property. Accessory building is an addition to an existing building. Owner says he was not aware he needed a permit. Says he’ll apply for permit immediately. Issued Courtesy Letter dated January 13, 2022.
  - Site visit 4/11/22 - Construction stopped. Building frame remains.
  
9. **8308 Potters Rd** - utility building in front yard without a permit  
Status: Under Enforcement
  - Utility building located in front yard area without a permit. Site visit was conducted and confirmed that construction is in progress. Issued a letter requesting the owner obtain a permit and take the appropriate actions to comply with setback requirements. Met owners and owners representatives on site. Owner informed me that the “storage” building was “existing” when he purchased the property and he decided to enclose the storage building and install HVAC unit. The owner said his contractor failed to obtain the permit. I informed him the structure was in violation of Town Zoning ordinances (accessory buildings not allowed in front yard areas).
  - 4/11/22 Site visit conducted. Structure still in violation.
  
10. **7200 Forest Ridge Rd** - non-residential activity (sawing) in residential district  
Status: Under Enforcement
  - Site visit conducted on 3/31/21, notice of Violation issued ordering all sawing and related activity to stop.
  - Zoning Administrator met with property owner on 4/30/21; timeline developed to bring property into compliance.



WEDDINGTON  
General Fund  
BALANCE SHEET  
AS OF: 11/30/22

2023

2022

Assets

10-1120-000	SOUTH STATE CHECKING ACCOUNT	499,071.86	2,079,665.04
10-1120-001	TRINITY MONEY MARKET	0.00	0.00
10-1120-002	CITIZENS SOUTH CD'S	0.00	0.00
10-1130-000	BB&T/TRUIST CHECKING	2,424,434.83	1,764,466.50
10-1130-001	BB&T/TRUIST MONEY MARKET	250,019.39	250,008.93
10-1140-000	WACHOVIA	0.00	0.00
10-1170-000	NC CASH MGMT TRUST	2,077,075.53	559,707.00
10-1205-000	A/R OTHER	0.00	0.00
10-1211-001	A/R PROPERTY TAX	471,105.70	19,874.01
10-1212-001	A/R PROPERTY TAX - 1ST YEAR PRIOR	8,433.20	1,431.14
10-1212-002	A/R PROPERTY TAX - NEXT 8 PRIOR YRS	4,812.87	3,666.54
10-1213-000	A/R PROPERTY TAX INTEREST RECEIVABL	2,071.87	2,542.81
10-1214-000	PREPAID ASSETS	0.00	15,825.90
10-1215-000	A/R INTERGOVT-LOCAL OPTION SALES TX	0.00	53,110.99
10-1216-000	A/R INTERGOVT - MOTOR VEHICLE TAXES	0.00	20,108.38
10-1217-000	A/R INTERGOVT	0.00	0.00
10-1232-000	SALES TAX RECEIVABLE	670.89	670.89
10-1240-000	INVESTMENT INCOME RECEIVABLE	0.00	0.00
10-1610-001	FIXED ASSETS - LAND & BUILDINGS	2,513,697.44	2,513,697.44
10-1610-002	FIXED ASSETS - FURNITURE & FIXTURES	9,651.96	9,651.96
10-1610-003	FIXED ASSETS - EQUIPMENT	17,747.14	17,747.14
10-1610-004	FIXED ASSETS - INFRASTRUCTURE	26,851.00	26,851.00
10-1610-005	FIXED ASSETS - COMPUTERS	10,155.51	10,155.51
10-1610-006	FIXED ASSETS - COMPUTER SOFTWARE	182,994.00	182,994.00
	Total Assets	<u>8,498,793.19</u>	<u>7,532,175.18</u>

Liabilities & Fund Balance

10-2110-000	ACCOUNTS PAYABLE	0.00	17,499.93
10-2115-000	ACCOUNTS PAYABLE ACCRUAL	0.00	0.00
10-2116-000	CUSTOMER REFUNDS	5,650.26	541.56
10-2120-000	BOND DEPOSIT PAYABLE	75,002.25	75,002.25
10-2151-000	FICA TAXES PAYABLE	0.00	0.00
10-2152-000	FEDERAL TAXES PAYABLE	0.00	0.00
10-2153-000	STATE W/H TAXES PAYABLE	0.00	0.00
10-2154-001	NC RETIREMENT PAYABLE	0.02	0.00
10-2155-000	HEALTH INSURANCE PAYABLE	4,293.00-	0.00
10-2156-000	LIFE INSURANCE PAYABLE	43.20-	0.00
10-2157-000	401K PAYABLE	0.00	0.00
10-2200-000	ENCUMBRANCES	0.00	0.00
10-2210-000	RESERVE FOR ENCUMBRANCES	0.00	0.00
10-2605-000	DEFERRED REVENUES- TAX INTEREST	2,071.87	2,537.74
10-2620-000	DEFERRED REVENUE - DELQ TAXES	8,433.20	1,431.14
10-2625-000	DEFERRED REVENUE - CURR YR TAX	471,105.70	19,874.01
10-2630-000	DEFERRED REVENUE-NEXT 8	4,812.87	3,666.54
	Total Liabilities	<u>562,739.97</u>	<u>120,553.17</u>
10-2640-001	FUND BALANCE - UNASSIGNED	3,131,556.46	3,131,556.46
10-2640-002	FUND BALANCE - RESERVE WATER/SEWER	0.00	0.00
10-2640-003	FUND BALANCE-ASSIGNED	820,000.00	820,000.00
10-2640-004	FUND BALANCE-INVEST IN FIXED ASSETS	2,761,097.05	2,761,097.05
10-2640-005	CURRENT YEAR EQUITY YTD	0.00	0.00
	Total	<u>6,712,653.51</u>	<u>6,712,653.51</u>
	Revenue	1,453,858.11	2,848,267.98
	Less Expenses	929,426.90	2,149,299.48

	2023	2022
Net	524,431.21	698,968.50
Total Fund Balance	7,237,084.72	7,411,622.01
Total Liabilities & Fund Balance	7,799,824.69	7,532,175.18

WEDDINGTON  
Statement of Revenue and Expenditures

Revenue Account Range: First to Last      Include Non-Anticipated: Yes      Year To Date As Of: 11/30/22  
Expend Account Range: First to Last      Include Non-Budget: No      Current Period: 11/01/22 to 11/30/22  
Print Zero YTD Activity: No      Prior Year: 11/01/21 to 11/30/21

Revenue Account	Description	Prior Yr Rev	Anticipated	Current Rev	YTD Revenue	Cancel	Excess/Deficit	% Real
10-3101-110	AD VALOREM TAX - CURRENT	673,222.09	1,400,000.00	970,375.97	1,014,344.58	0.00	385,655.42-	72
10-3102-110	AD VALOREM TAX - 1ST PRIOR YR	245.74	2,500.00	1,558.73	11,559.78	0.00	9,059.78	462
10-3103-110	AD VALOREM TAX - NEXT 8 YRS PRIOR	241.28	2,250.00	127.23	239.41	0.00	2,010.59-	11
10-3110-121	AD VALOREM TAX - MOTOR VEH CURRENT	0.00	110,000.00	11,951.86	48,028.75	0.00	61,971.25-	44
10-3115-180	TAX INTEREST	57.91	2,250.00	120.64	742.59	0.00	1,507.41-	33
10-3231-220	LOCAL OPTION SALES TAX REV - ART 39	45,984.22	540,000.00	59,723.57	234,115.37	0.00	305,884.63-	43
10-3322-220	BEER & WINE TAX	0.00	45,000.00	0.00	0.00	0.00	45,000.00-	0
10-3324-220	UTILITY FRANCHISE TAX	0.00	457,500.00	0.00	108,277.60	0.00	349,222.40-	24
10-3340-400	ZONING & PERMIT FEES	2,715.00	10,000.00	1,737.50	11,197.50	0.00	1,197.50	112
10-3350-400	SUBDIVISION FEES	200.00	10,000.00	247.50	3,847.50	0.00	6,152.50-	38
10-3360-400	STORMWATER EROSION CONTROL FEES	0.00	10,000.00	330.00	330.00	0.00	9,670.00-	3
10-3830-891	MISCELLANEOUS REVENUES	811.26	1,000.00	948.63-	3,740.80	0.00	2,740.80	374
10-3831-491	INVESTMENT INCOME	0.00	1,000.00	6,004.09	17,434.23	0.00	16,434.23	***
10 General Fund Revenue Total		723,477.50	2,591,500.00	1,051,228.46	1,453,858.11	0.00	1,137,641.89-	56
Expend Account	Description	Prior Yr Expd	Budgeted	Current Expd	YTD Expended	Cancel	Balance	% Expd
10-4110-000	GENERAL GOVERNMENT	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4110-120	FIRE	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4110-126	FIRE DEPT SUBSIDIES	66,785.42	817,675.00	68,121.08	339,269.74	0.00	478,405.26	41
10-4110-127	FIRE DEPARTMENT BLDG/MAINTENANCE	0.00	10,000.00	0.00	0.00	0.00	10,000.00	0
10-4110-150	POLICE	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4110-155	POLICE PROTECTION	0.00	334,775.00	0.00	167,922.46	0.00	166,852.54	50
10-4110-160	EVENT PUBLIC SAFETY	240.00	4,000.00	0.00	0.00	0.00	4,000.00	0
10-4110-180	GOVERNING BOARD	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4110-190	LEGAL	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4110-192	ATTORNEY FEES - GENERAL	5,000.00	67,500.00	5,562.50	26,687.50	0.00	40,812.50	40
10-4110-193	ATTORNEY FEES - LITIGATION	0.00	5,000.00	0.00	0.00	0.00	5,000.00	0
10-4110-320	OTHER GENERAL GOVERNMENT	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4110-330	ELECTION EXPENSE	0.00	3,000.00	0.00	0.00	0.00	3,000.00	0
10-4110-342	HOLIDAY/TREE LIGHTING	1,500.00	4,500.00	3,516.55	3,974.14	0.00	525.86	88
10-4110-343	SPRING EVENT	0.00	10,175.00	0.00	0.00	0.00	10,175.00	0
10-4110-344	OTHER COMMUNITY EVENTS	0.00	2,250.00	0.00	0.00	0.00	2,250.00	0
4110 GENERAL GOVERNMENT		73,525.42	1,258,875.00	77,200.13	537,853.84	0.00	721,021.16	43

WEDDINGTON  
Statement of Revenue and Expenditures

Expend Account	Description	Prior Yr Expd	Budgeted	Current Expd	YTD Expended	Cancel	Balance	% Expd
10-4120-000	ADMINISTRATIVE	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4120-120	SALARIES & EMPLOYEE BENEFITS	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4120-121	SALARIES - CLERK	4,619.86	54,000.00	5,399.58	22,435.84	0.00	31,564.16	42
10-4120-123	SALARIES - TAX COLLECTOR	5,032.71	53,000.00	5,454.27	22,183.49	0.00	30,816.51	42
10-4120-124	SALARIES - FINANCE OFFICER	2,453.88	14,175.00	2,269.59	6,542.07	0.00	7,632.93	46
10-4120-125	SALARIES - MAYOR & TOWN COUNCIL	2,100.00	25,200.00	2,100.00	10,500.00	0.00	14,700.00	42
10-4120-181	FICA EXPENSE	1,086.79	11,500.00	1,164.60	4,717.10	0.00	6,782.90	41
10-4120-182	EMPLOYEE RETIREMENT	1,878.40	21,750.00	2,192.49	9,013.12	0.00	12,736.88	41
10-4120-183	EMPLOYEE INSURANCE	1,160.00	14,590.00	1,215.00	6,075.00	0.00	8,515.00	42
10-4120-184	EMPLOYEE LIFE INSURANCE	15.68	200.00	16.64	83.20	0.00	116.80	42
10-4120-185	EMPLOYEE S-T DISABILITY	13.00	175.00	13.50	67.50	0.00	107.50	39
10-4120-190	PROFESSIONAL SERVICES	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4120-191	AUDIT FEES	0.00	8,750.00	0.00	0.00	0.00	8,750.00	0
10-4120-193	CONTRACT LABOR	0.00	51,500.00	0.00	8,692.98	0.00	42,807.02	17
10-4120-200	OTHER ADMINISTRATIVE	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4120-205	OFFICE SUPPLIES - ADMIN	163.19	9,000.00	433.54	1,368.85	0.00	7,631.15	15
10-4120-210	PLANNING CONFERENCE	0.00	750.00	0.00	2,100.00	0.00	1,350.00	280
10-4120-321	TELEPHONE - ADMIN	131.40	2,000.00	0.00	409.09	0.00	1,590.91	20
10-4120-325	POSTAGE - ADMIN	300.00	2,500.00	580.50	580.50	0.00	1,919.50	23
10-4120-331	UTILITIES - ADMIN	49.21	5,000.00	253.92	1,320.91	0.00	3,679.09	26
10-4120-351	REPAIRS & MAINTENANCE - BUILDING	0.00	7,500.00	0.00	0.00	0.00	7,500.00	0
10-4120-352	REPAIRS & MAINTENANCE - EQUIPMENT	689.68	72,450.00	7,630.67	36,435.08	0.00	36,014.92	50
10-4120-354	REPAIRS & MAINTENANCE - GROUNDS	3,750.00	102,500.00	4,150.00	24,768.00	0.00	77,732.00	24
10-4120-355	REPAIRS & MAINTENANCE - PEST CONTRL	0.00	1,500.00	0.00	473.36	0.00	1,026.64	32
10-4120-356	REPAIRS & MAINTENANCE - CUSTODIAL	400.00	6,000.00	500.00	2,015.17	0.00	3,984.83	34
10-4120-370	ADVERTISING - ADMIN	0.00	1,000.00	32.30	64.60	0.00	935.40	6
10-4120-397	TAX LISTING & TAX COLLECTION FEES	0.00	500.00	401.31	401.31	0.00	98.69	80
10-4120-400	ADMINISTRATIVE:TRAINING	270.00	4,500.00	160.88	5,104.88	0.00	604.88	113
10-4120-410	ADMINISTRATIVE:TRAVEL	0.00	4,000.00	128.56	1,508.66	0.00	2,491.34	38
10-4120-450	INSURANCE	83.06	16,500.00	0.00	16,436.45	0.00	63.55	100
10-4120-491	DUES & SUBSCRIPTIONS	465.92	25,000.00	247.04	15,218.04	0.00	9,781.96	61
10-4120-498	GIFTS & AWARDS	0.00	2,000.00	118.70	286.05	0.00	1,713.95	14
10-4120-499	MISCELLANEOUS	2,408.78	15,500.00	1,420.03	4,409.13	0.00	11,090.87	28
10-4120-500	CAPITAL EXPENDITURES	5,084.83	19,500.00	0.00	0.00	0.00	19,500.00	0
4120 ADMINISTRATIVE		31,990.27	552,540.00	35,883.12	203,210.38	0.00	349,329.62	37
10-4120-600	CONTINGENCY	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4130-000	ECONOMIC & PHYSICAL DEVELOPMENT	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4130-120	SALARIES & EMPLOYEE BENEFITS	0.00	0.00	0.00	0.00	0.00	0.00	0



WEDDINGTON  
Statement of Revenue and Expenditures

Expend Account	Description	Prior Yr Expd	Budgeted	Current Expd	YTD Expended	Cancel	Balance	% Expd
10-4130-121	SALARIES - ZONING ADMINISTRATOR	0.00	82,500.00	7,053.48	34,553.48	0.00	47,946.52	42
10-4130-123	SALARIES - ADMINISTRATIVE ASSISTANT	0.00	24,000.00	1,707.82	7,996.80	0.00	16,003.20	33
10-4130-124	SALARIES - PLANNING BOARD	325.00	5,150.00	250.00	1,050.00	0.00	4,100.00	20
10-4130-125	SALARIES - SIGN REMOVAL	222.74	7,500.00	252.00	1,386.00	0.00	6,114.00	18
10-4130-181	FICA EXPENSE - P&Z	41.92	9,000.00	554.05	2,668.26	0.00	6,331.74	30
10-4130-182	EMPLOYEE RETIREMENT - P&Z	0.00	17,000.00	1,072.13	5,252.13	0.00	11,747.87	31
10-4130-183	EMPLOYEE INSURANCE	0.00	14,635.00	1,017.00	5,085.00	0.00	9,550.00	35
10-4130-184	EMPLOYEE LIFE INSURANCE	0.00	375.00	26.56	132.80	0.00	242.20	35
10-4130-185	EMPLOYEE S-T DISABILITY	0.00	175.00	13.50	67.50	0.00	107.50	39
10-4130-190	CONTRACTED SERVICES	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4130-192	CONSULTING STORMWATER CONTROL	9,903.30	84,000.00	5,184.40	23,391.81	0.00	60,608.19	28
10-4130-193	CONSULTING	821.46	60,000.00	160.13	4,788.75	0.00	55,211.25	8
10-4130-194	CONSULTING - COG	0.00	10,000.00	1,848.00	1,848.00	0.00	8,152.00	18
10-4130-200	OTHER PLANNING	0.00	0.00	0.00	0.00	0.00	0.00	0
10-4130-201	OFFICE SUPPLIES - PLANNING & ZONING	143.78	7,500.00	1,788.43	2,434.40	0.00	5,065.60	32
10-4130-202	ZONING SPECIFIC OFFICE SUPPLIES	0.00	2,500.00	0.00	0.00	0.00	2,500.00	0
10-4130-215	HISTORIC PRESERVATION	0.00	250.00	0.00	0.00	0.00	250.00	0
10-4130-220	INFRASTRUCTURE	0.00	445,000.00	95,000.00	95,000.00	0.00	350,000.00	21
10-4130-321	TELEPHONE - PLANNING & ZONING	131.39	2,000.00	272.61	681.69	0.00	1,318.31	34
10-4130-325	POSTAGE - PLANNING & ZONING	300.00	2,500.00	580.51	580.51	0.00	1,919.49	23
10-4130-331	UTILITIES - PLANNING & ZONING	0.00	5,000.00	267.83	1,445.55	0.00	3,554.45	29
10-4130-370	ADVERTISING - PLANNING & ZONING	0.00	1,000.00	0.00	0.00	0.00	1,000.00	0
4130 ECONOMIC & PHYSICAL DEVELOPMENT		11,889.59	780,085.00	116,728.19	188,362.68	0.00	591,722.32	24
10 General Fund Expend Total		117,405.28	2,591,500.00	229,811.44	929,426.90	0.00	1,662,073.10	36

10 General Fund		Prior	Current	YTD
Revenues:		723,477.50	1,051,228.46	1,453,858.11
Expended:		117,405.28	229,811.44	929,426.90
Net Income:		606,072.22	821,417.02	524,431.21

Grand Totals		Prior	Current	YTD
Revenues:		723,477.50	1,051,228.46	1,453,858.11
Expended:		117,405.28	229,811.44	929,426.90
Net Income:		606,072.22	821,417.02	524,431.21

Expend Account	Description	Prior Yr Expd	Budgeted	Current Expd	YTD Expended	Cancel	Balance	% Expd
----------------	-------------	---------------	----------	--------------	--------------	--------	---------	--------

---

**TOWN OF  
W E D D I N G T O N  
MEMORANDUM**

**TO:** Mayor and Town Council

**FROM:** Kim Woods, Tax Collector

**DATE:** December 12, 2022

**SUBJECT:** Monthly Report–November2022

<b>Transactions:</b>	
Refunds	\$4010.57
Interest Charges	\$102.91
Balance Adjustments	\$197.40
Releases	\$(41.38)
<b>Taxes Collected:</b>	
2019	\$(98.95)
2021	\$(1707.65)
2022	\$(974377.09)
<b>As of November 30, 2022; the following taxes remain Outstanding:</b>	
2012	\$254.18
2013	\$273.97
2014	\$264.54
2015	\$620.43
2016	\$421.78
2017	\$804.01
2018	\$799.69
2019	\$1370.02
2020	\$1441.64
2021	\$9,077.13
2022	\$471,064.32
<b>Total Outstanding:</b>	\$486,391.71