

Town of Wendell



Small Town. Big Charm.



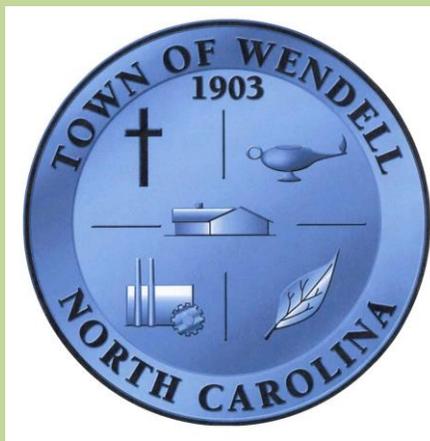
**TOWN OF WENDELL
FY 2019-2020 BUDGET
TABLE OF CONTENTS**

	Page
Introduction	
Town Officials.....	1
Organization Chart.....	2
Town Manager’s Budget Message.....	3
A Guide for Reviewing the Budget.....	8
Budget Process and Calendar	9
Basis of Budgeting.....	10
Financial Policies	10
Strategic Plan	14
Budget Summary.....	27
Adopted Budget Ordinance	28
Budget Overview – All Funds	30
Revenues by Type – Descriptions, Trends, and Assumptions.....	31
Expenditures by Function – Descriptions and Trends	38
Staffing Analysis and Authorized Positions.....	39
General Fund.....	41
Revenue and Expenditure Summary	42
Governing Body.....	48
Administration	49
Information Technology.....	51
Finance	52
Economic Development.....	54
Community Development / Planning	55
Public Buildings and Grounds	58
Police / Law Enforcement	59
Fire Services	61
Public Works	62
Powell Bill / Local Roads	65
Parks and Recreation	66
Non-Departmental.....	68
Special Appropriation	69
General Fund Balance	70
Water and Sewer Funds.....	71
Long Range Financial Planning.....	72
Capital Improvement and Debt Summary	73
Capital Improvement Program	74
Debt Management Program	96

Supplemental and Statistical Materials	97
History and Form of Government.....	97
Population, Demographics and Statistics	99
Comparative Rates and Fees Analysis.....	103
Town of Wendell Fee Schedule	107
Outside Agency Service Partners	117
Glossary.....	118

TOWN OF WENDELL NORTH CAROLINA

2019-2020 BUDGET
FOR THE YEAR ENDING JUNE 30, 2020



Town Officials

Mayor and Town Commission

Virginia R. Gray – Mayor
John Boyette – Commissioner
Jason Joyner – Commissioner

John Lutz – Mayor Pro Tempore
Ben Carroll – Commissioner
David Myrick – Commissioner

Officials

Marvin “Marc” Collins
Town Manager

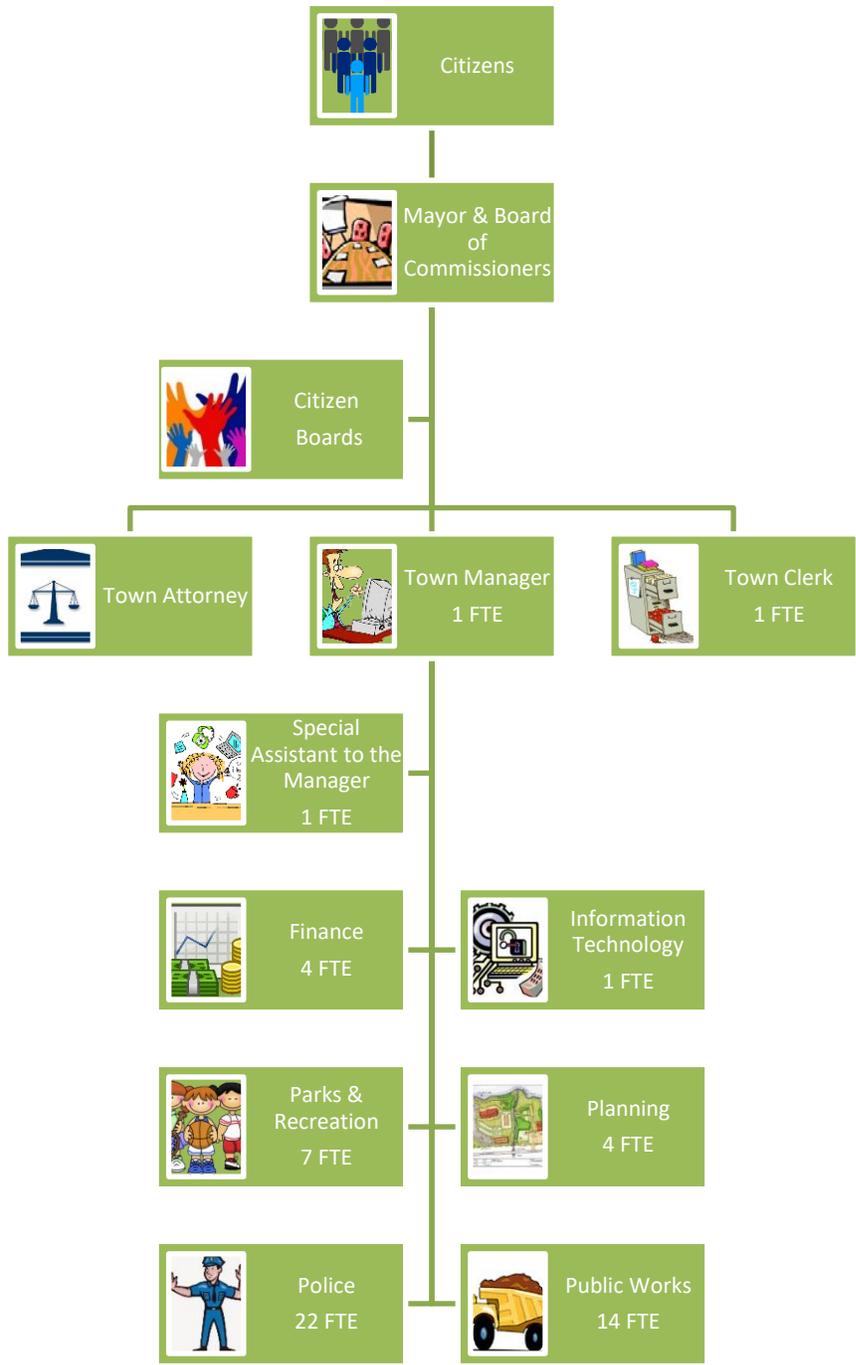
James P. Cauley, III
Town Attorney

Megan Howard
Town Clerk

Department Heads and Budget Staff

Brian Bray – Public Works Director
Bill Carter – Police Chief
Jeff Polaski – Parks & Recreation Director
Garrett Johnson – Accountant

David Bergmark – Planning Director
Butch Kay – Finance Director
Sherry Scoggins – Special Assistant
to the Manager



55 Full Time Equivalents (FTE)

CITIZEN BOARDS, ELECTED OFFICIALS, AND THE TOWN ATTORNEY ARE NOT EMPLOYEES OF THE TOWN OF WENDELL.



15 E Fourth St, Wendell NC 27591 919.365.4450
www.townofwendell.com

Honorable Mayor and Board of Commissioners:

Pursuant to Section 159-11 of the North Carolina General Statutes, I am honored to submit the Fiscal Year 2019-2020 (FY 2020) budget for your consideration. The submitted budget is balanced and in compliance with the Local Government Budget and Fiscal Control Act and the Financial Policies of the Town of Wendell. While the growth of the built environment and improvements in quality of life are highly visible to the community, the increased effort to link the strategic initiatives adopted by the Board of Commissioners to the resources appropriated by this document are major that often go unnoticed. The FY 2020 Budget document provides transparency and information to the public in a new format.

The FY 2020 budget totals \$8,027,766, an increase of 10.8% above the total budget for FY 2019, and recommends maintaining a flat property tax rate of 49.0 cents per \$100 of taxable valuation. This All Funds total increase includes capital expenses, debt service, and the Water and Sewer Funds in addition to the General Fund operating and personnel expenses. The Wake County Fire Tax will also maintain a flat rate of 9.6 cents per \$100 of taxable valuation. The rates for water and sewer usage and solid waste remain unchanged for FY 2020. The increased budget is a reflection on increased revenues resulting from growth and like increases in expenses to maintain services to a larger community.

The fee schedule remains largely unchanged except for new program fees (soccer, wiffleball, kickball, community garden, weight room, and general program classes) and minor market adjustments to existing programs including a \$5 per day increase for Track-out Camp and a \$50 per team increase for co-ed volleyball. The golf cart fee established in FY 2018 is added with an estimated revenue of \$3,500.

The budget maintains comparative tax rates and fees to other area communities given the valuation of assessed property and fiscally conservative policy approach to reduce the impact of taxation on residents. In addition to maintaining fiscal controls, the Town of Wendell is experiencing steady growth evidenced by approximately \$75 million in new development being assessed for FY 2020 and increasing residential and commercial development rates reflected in planning and permitting programs. The development of the budget in FY 2020 takes caution in the allocation of resources to best increase investments in services to meet the policy goals of a growing community.

Budget Priorities

Every effort is made in the proposed budget to maintain core levels of municipal services and to incorporate strategic initiatives from the 2019 Town of Wendell Strategic Plan adopted in February 2019. The inclusion of the following budget priorities establishes the budget as a means to allocate resources and provide direction to staff for the accomplishment of community goals.

The budget seeks to promote the goal of increasing economic vitality through the development of a vibrant Downtown, economic growth, and building upon a unique community character. Economic growth is anticipated to accelerate through increased private investments and development announcements in FY 2020. The role of the Town to encourage this activity in a manner consistent with preferred community character includes investment in public spaces and economic development programs. The FY 2020 budget promotes these efforts by providing for the development of an economic development program through contract services (\$30,000), façade grant program funding (\$10,000), participating in the Triangle J Council of Governments regional brownfield program (\$8,000), and increased Downtown maintenance funding for the Town Square stage, streetlights, and waste receptacles.

Providing for a safe and secure community that nurtures livable family-friendly neighborhoods starts with the investment in public safety and the professionalism of the department. Investments in public safety priorities include initiating the CALEA accreditation staffing and program as well as increasing training and education by \$14,920. Increases are provided for departmental supplies (\$9,250) and uniform (\$5,550) lines to purchase training ammunition and replace worn equipment.

The FY 2020 budget reflects an increased effort to maintain existing infrastructure and plan for the addition of new sidewalks and increased stormwater compliance. The regulatory requirements for the stormwater program are increasing and will include the addition of Wendell to be subject to the Neuse River Rules and a Stormwater Permit Audit by the State. The budget increases funding for stormwater maintenance (\$12,950) and provides resource to complete stormwater mapping (\$10,500). Significant efforts are made to implement the 2017 Pedestrian Plan including a Wendell Boulevard Sidewalk project that will connect Wendell Elementary School to the grocery store and improve pedestrian crossings.

The promotion of healthy lifestyles and cultural engagement is well underway in the development of a Parks and Recreation Master Plan anticipated to be completed in FY 2020. The Wendell Park Improvements will maintain existing facilities and add Wi-Fi service outside and future projects are planned for acquiring park land, construction of a new park, and initiating a multi-purpose trail to anticipate recommendations in the plan due to community needs from growth.

The budget document itself reflects the implementation of a significant policy initiative in FY 2019 and FY 2020 build a professional and inclusive Town organization that prides itself for being fiscally responsible, innovative, and initiates efforts to develop staff to meet the needs of the rapidly growing community. The budget provides for no tax increases or borrowing in FY 2020. Several of the new features in the budget include a five-year capital improvement program, results of the ten-year staffing needs analysis, and significant increases in comparative data and explanations of the budget environment including new sections for a budget summary, department budget details with goals and performance measures, capital project descriptions, and a wealth of additional information to

assist citizens to better understand the programs and funding of their Town. The organization-wide efforts of staff in preparing this document are deserving of praise.

General Fund

Revenues

Total revenues for FY 2020 are \$7,527,766 representing a 19.3% increase from revenues in FY 2019. Change in revenues include ad valorem (property) tax increasing \$475,183 (17.1%) from new development value, fund balance transfer increasing \$450,700 (183.4%) to cover capital expenses, and sales tax increasing \$110,395 (8.4%) due to population growth. Revenues tied to development and population growth reflected positive growth overall in developing the FY 2020 budget.

Property taxes remain the primary source of revenue (43%) followed by unrestricted intergovernmental (24%), sales and services (12%), fund balance (9%), licenses and permits (6%), restricted intergovernmental (3%), permits and fees (2%), interest income (1%), and other income (<1%).

Expenses

Total expenses for the FY 2020 budget are \$7,527,766 including a fund balance appropriation of \$696,500 for capital expenses. The \$1,218,196 increase in General Fund expenses is a 19.3% increase from FY 2019 to FY 2020. Debt service is reduced by 43.6%, but personnel, operating, and capital expenses all increase as indicated in the following table.

	FY2019	FY 2020	Difference	% Change
Personnel	\$ 3,474,300	\$ 3,735,387	\$ 261,087	7.5
Operating	\$ 2,153,970	\$ 2,818,379	\$ 664,409	30.8
Capital	\$ 224,800	\$ 716,500	\$ 491,700	218.7
Debt Service	\$ 456,500	\$ 257,500	\$ (199,000)	(43.6)
Total	\$ 6,309,570	\$ 7,527,766	\$ 1,218,196	19.3

Operating increases of 30.8 percent reflect the investment in supplies, training, and equipment needed to maintain existing services and infrastructure in a growing community. Further, the increases reflect the budget priorities established by the Commission and regulatory requirements related to stormwater and accessibility. Continued increases in future years are anticipated consistent with growing revenues to keep pace with demand for municipal services.

Personnel

The proposed budget increases the number of positions from 51 to 55 in FY 2020. The four new positions include a Parks Maintenance Technician, a Police Officer (starting January 1, 2020), a Records and Training Administrator (starting January 1, 2020), and a Public Works Specialist. The new staff reflects the necessary investment for a sufficient workforce to maintain service levels understanding that continued growth places additional strain on staff. In addition to Town staff, the budget provides for increased contract services for the attorney to attend two meetings per month, an economic development consultant, and a shared public information officer in partnership with the Town of Rolesville and East Wake Television.

In addition to positions, the budget provides for a 3% increase in salaries for staff (2% cost of living allowance and 1% merit increment to reduce compression). In addition to salary increases, part-time funding increases are provided in Parks and Recreation, Public Works, and Police. Overtime compensation lines are added to the budget for Public Works and Police. The budget includes funding to complete a compensation and classification study to recommend appropriate pay scales and ranges, assist in updating job descriptions, and recommending adjustments in existing positions.

Benefit costs are increasing in FY 2020 with an anticipated 22% increase in health care costs due to the organization having a high claims experience during the past year. Additional benefits provided include that establishment of an employee assistance program (EAP) for counselling services (\$9,000) and a wellness benefit for police officers for reimbursement of monthly gym costs (\$6,000).

Personnel costs (salary, FICA, and retirement) total \$3,735,387 and represent 50% of expenses in the FY 2020 budget.

Capital Expenditures

The capital budget for FY 2020 is \$716,500 which represents a 191.5% increase over FY 2019. Funding is provided from the fund balance (\$696,500) and Powell Bill revenue (\$20,000). Capital budget projects for FY 2020 include Wendell Boulevard Sidewalk Project Design (\$185,000), ADA Local Road Compliance (\$20,000), Leaf Collector Truck (\$195,000), Public Works Pickup Truck Replacement (\$28,000), two Mowers (\$17,000), two replacement and one new Police Vehicles (\$171,000), Technology Replacement Program (\$15,000), Wendell Park Improvements (\$25,500), and initiating the Comprehensive Land Use Plan Update (\$60,000). Capital improvements represent 10% of the FY 2020 budgeted expenses.

The five-year capital improvement program identifies both revenues and expenses for FY 2020 through FY 2024 for a total expenditure of \$12,213,743. The capital improvement program includes planning for revenue growth to offset the use of fund balance, needed road and sidewalk improvements, a new town hall, vehicle and equipment replacement, and new parks and community spaces. However, years two through five are for planning purposes only and will be evaluated regularly to reflect community growth, adopted plans, and economic conditions.

Debt Management

No new issuance of debt or lease is recommended in the FY 2020 budget and \$396,487 is allocated to retire principal and interest of past debt. The net debt of the Town is \$3,668,200 and the legal debt margin (amount legally available) is \$48,938,960. Debt service represents 3% of the FY 2020 budgeted expenses.

Fund Balance

The FY 2020 budget appropriates \$696,500 from the fund balance to fund capital expenditures. The remaining fund balance of 88.5% exceeds the suggested minimum of the Local Government Commission (8%) and the fiscal policy of the Town of Wendell (40%). The fund balance remains healthy and available if needed.

Water and Sewer Funds

The two enterprise funds of the Town of Wendell are the Water Fund and the Sewer Fund. Since the Merger Agreement with the City of Raleigh for the provision of water and sewer service in 2006, the Water and Sewer Funds are used to account for the retirement of past utility debt. Debt service payments are determined annually and paid by the Town. The City of Raleigh provides a like payment to the Town to offset the debt payment. For FY 2020, the Water Fund revenue and expense is \$50,000. The Sewer fund revenue and expense is \$450,000.

Budget Summary

The FY 2020 budget represents a significant advance in budget development for the organization thanks to the efforts of staff and policy direction from the Board. The document bridges the vision to keep Wendell's motto of "Small Town, Big Charm" alive as the town grows into the vibrant, welcoming community of tomorrow.

Given the attention to transparency and accountability, connection of resource allocation to the budget priorities of the Board of Commissioners, and flat property tax rate, I trust the budget document will provide the materials needed to work together toward adoption of our FY 2020 Budget.

Respectfully submitted,

Marc Collins

Marvin "Marc" Collins
Town Manager

A Guide for Reviewing the Budget

The following guide is provided to assist the reader understand and locate information within the budget document. It is the intent of the Town to provide the information that is clear, concise and organized in a manner that flows in a logical sequence. Above all else, it is the intent of this document to identify the services provided by the Town of Wendell and the connection of those services to funding. The Budget document is organized into the following sections:

Introduction and Overview – This section identifies the elected, appointed, and staff leadership of the Town as well as the organization chart for fiscal year 2020. The Manager’s Message provides an overview of the budget and identifies the issues addressed and opportunities achieved in the budget. The budget message is followed by this Guide for Reviewing the Budget, the budget process calendar, the basis of budgeting used to develop the budget, and the financial and budget policies.

Strategic Plan – The Town of Wendell Strategic Plan is incorporated into the Budget in this section. The Strategic Plan identifies five key policy goals and establishes prioritized initiatives for each goal. The goals provide policy direction for economic development, public safety, infrastructure and transportation, parks and recreation, and the communication and culture of the Town organization. An update on progress in achieving the initiatives through this budget is provided.

Budget Summary - The Budget Ordinance provides adopted totals in the form required by the North Carolina General Statutes. A summary of revenues and expenditures is provided for all funds by type, category, and function. The section also identifies descriptions, trends, projections, and assumptions for each revenue type and expense by function. An analysis of past and proposed staffing for FY 2020 and a ten-year staffing projection is provided.

General Fund – A line item summary of revenues and expenditures in the general fund is provided for past years, the previous budget, department requests, recommended amounts, and the adopted budget. Further detail and analysis for each department is provided including a general description of service, a discussion of revenues and expenditures, staffing, department goals, and performance measures.

Water and Sewer Fund – The water and sewer funds provide an update of the merger agreement with the City of Raleigh Utilities Department and any programmed capital or debt related to the utilities. The City of Raleigh is responsible for all revenues and expenses related to the operation, maintenance, and capital replacement of the systems.

Long-Range Financial Planning – This section incorporates the Five-Year Capital Improvement Plan into the budget document. Year one of the plan is the capital budget programmed for expenditure in FY 2020 and years two through five are for planning purposes. Capital projects are expenditures over \$10,000 and typically involves facilities, land, plans, vehicles, and equipment. A description of each expense is provided in the capital improvement program. The debt management program is provided in this section to identify current debt of the Town.

Supplemental and Statistical Materials – The section provides information that is applicable to the entire document including the history, form of government, population projections, community profile, demographics, and Town statistics. Next is a comparison of rates and values with communities in the area and the schedule of fees for FY 2020. Finally, a glossary of terms and common acronyms is provided.

**Town of Wendell
FY 2019-2020 Budget Calendar**

The following budget calendar was prepared in compliance with the Local Government Budget and Fiscal Control Act (LGBFCA) and local procedures as applicable. A date with an asterisk (*) indicates an opportunity for public input is provided.

DATE	ACTIVITY	NOTES
January 14, 2019*	Presentation of Financial Policy Amendments	Local procedure
January 15, 2019	Initial budget materials provided to Departments	Local procedure
January 28, 2019*	Presentation of Draft 2019 Strategic Plan	Local procedure
February 11, 2019*	Approval of 2019 Strategic Plan	Local procedure
February 23, 2019*	Board of Commission Budget Retreat	Local procedure
February 25, 2019*	City of Raleigh Utilities Merger Report	Local procedure
March 5, 2019	Final budget materials provided to Departments	Local procedure
March 19, 2019	Department Requests Submitted to Budget Officer (LGBFCA deadline is April 30)	NCGS 159.10
March 25, 2019	Approval of Financial Policy Amendments	Local procedure
April 29, 2019*	Detailed Budget Work Session Presentation of Draft Budget	Local procedure
May 6, 2019	Submission of Budget with Message to Commission (LGBFCA deadline is June 1)	NCGS 159.11
	Budget made available to the public and press	NCGS 159.12
	Publish budget statement and public hearing date	NCGS 159.12
1 st Week of May	Individual Meetings with Commissioners	Local procedure
May 13, 2019*	Budget Hearing	NCGS 159.12
May 28, 2019*	Adoption of Budget, Levy Tax Rate, and Fee Schedule Adoption (LGBFCA deadline is by July 1)	NCGS 159.13

Basis for Budgeting

The Town of Wendell uses the modified accrual method as the basis for budgeting and for accounting of all funds. This approach to accounting recognizes revenues when they become measurable and expenditures at the time the liability is incurred. All revenues and expenditures must be included in the annual budget ordinance. Any operational appropriations that are not expended or encumbered shall lapse. The North Carolina Local Government Budget and Fiscal Control ACT (LGBFCA) controls how municipalities budget and spend money. The major effects of the LGBFCA on the budgetary process are as follows:

- Budget Preparation Calendar
- Budget Forms and Procedures
- Departmental Requests
- Recommended Budget
- Board Review
- Adoption of the Budget Ordinance
- Budget Adoption and Amendment

The Town of Wendell budget process and documents are consistent with the requirements of the LGBFCA.

Financial Goals and Policies

The following *Town of Wendell Financial Goals & Policies* were adopted by the Board of Commissioners on March 25, 2019 as Town Policy 107.

General

The Town of Wendell has an important responsibility to its citizens to carefully account for public funds, to manage municipal finances wisely, and to plan the adequate funding of services desired by the public, including the provision and maintenance of public facilities. The desires of the public in the provision of public services are imperative, and it is the role of the Board of Commissioners to communicate the public's desires.

The town needs to ensure that it is capable of adequately funding and providing those government services desired by the community. To that end and while remaining in compliance with the Local Government Budget and Fiscal Control Act, the Town will follow the Generally Accepted Accounting Principles (GAAP) and budgetary guidance from the Government Finance Officers Association (GFOA).

The financial goals and policy statements set forth in this section are intended to establish guidelines for the continued financial strength and stability of the Town of Wendell and to maintain public trust and confidence by utilizing resources in the most efficient manner possible.

Financial Goals

Financial goals are broad, fairly timeless statements of the financial position the town seeks to attain. The financial goals for the Town of Wendell focus on the following areas: Accountability; Budget; Fund Balance and Reserves; Cash Management; Capital Improvement Plan; Tax Rate and Fees; Debt Management; and Asset Replacement Schedule.

1. Accountability - The town will insure the legal use of public assets through an effective system of internal controls.
 - The town will strive to establish the lowest reasonable tax rate for its citizens without compromising the quality of municipal services.
 - The town will maintain a budgetary control system to ensure compliance with the approved budget and will maintain adequate internal controls to safeguard public assets.
 - Expenditures will be monitored through the accounting system with monthly reports to assure budgetary compliance.
 - Reports demonstrating the status of financial activity and results (including an annual independent audit) will be prepared on a timely basis and in compliance with Generally Accepted Accounting Procedures (GAAP).
 - The Town will prepare and submit a Comprehensive Annual Financial Report (CAFR) to the Government Finance Officers Association (GFOA).
2. Budget - A comprehensive annual budget will be adopted after careful consideration of public needs, their input, and availability of funding.
 - During the budget development process, the town will strive to maintain the tax rate and fees at the lowest possible rate.
 - During the budget development process, the town staff will strive to show and explain where areas of increased needs exist.
 - After a thorough budget process, an annual comprehensive budget will be adopted by ordinance. A detailed budget document disclosing all anticipated revenues and authorized appropriations for operating and capital expenditures will be prepared and published. The budget will establish the level of services to be provided by each department with anticipated revenues and available resources.
 - Where possible, grants or contributions of capital will be identified for proposed town expenditures. When grants are undertaken, the town will strive to be mindful of the long-term requirements and commitments involved in acceptance of such grants.
 - If the presented balanced budget includes a tax rate increase, staff must also present a balanced budget showing a tax rate decrease in the same amount of the tax rate increase.
3. Fund Balance and Reserves - The Town will strive to maintain a General Fund fund balance of 40%.
 - The purpose of the fund balance will be to provide sufficient operating reserves (working capital) to manage monthly and daily cash flow variability, as well as adequate liquidity to provide for limited interruptions in revenues (natural disasters, unexpected loss of revenue source, etc.).
 - The budgetary fund balance reserve will be calculated using the percentage of the last audited fund balance and the proposed operations and maintenance budget. The fund balance represents

only the unassigned fund balance and not the full GAAP fund balance. The operations and maintenance budget does not include capital expenditures for the calculation.

- Contingency and reserve funds will be available for use in the event of emergency and/or unforeseen events.
 - Cash balances in excess of the amount required to maintain strategic reserves can be used, with approval from the Board of Commissioners, to fund one-time or non-recurring costs. Preference will be given to uses that reduce ongoing expenses (for example - early retirement of debt or the reduction of debt necessary to complete a significant capital project).
 - It is the intent of the Town to replenish fund balance reserves in an expedient manner if conditions necessitate expenditure below the 40% policy level. The Town will restore the balance using any combination of end of year balances, reduced capital expenditures, or direct appropriation of revenues. The restoration of the fund balance will be done in a manner that maintains the structural balance of the whole budget.
4. Cash Management - The town's cash management policy will promote responsible, efficient and legal use of public funds and will optimize the management and earnings on the public funds.
- Central Depository – The town will maintain an interest-bearing account as its official central depository, as approved by the Board of Commissioners. The town also shall maintain a checking account for disbursements. Other accounts can be maintained as is necessary, with board approval.
 - Banking Relations – To ensure the lowest fees, best services, and highest rates of interest, the town's banking services will be continuously monitored and reviewed. No more than every five years, the town will review banking services to get the most competitive services and rates available and a recommendation for services will be submitted to the Board of Commissioners for approval.
5. Capital Improvement Plan - The Capital Improvement Plan will be comprehensive and updated every year.
- The town will update a Capital Improvements Plan (CIP) every year and provide a copy to the Town Board. This plan will be a long-range plan that will forecast facility needs and requirements town-wide for each of the next five years.
 - In the CIP, staff will attempt to forecast projected revenues and resources required to finance the capital improvement plans to ensure that the plan represents projects that can be realistically funded by the Town.
 - The CIP will be established in collaboration with Town departments and provide for public input in the Budget process.
 - In addition to facilities, the plan will include projections for equipment requirements valued in excess of \$10,000.

- Long-term borrowing will be confined to significant capital improvements (or similar projects) that have an extended life and to instances when it is not practicable to provide financing from the current revenues. All other available and appropriate sources of financing will be exhausted before long term borrowing is pursued.
6. Tax Rate and Fees - The town will establish a responsible tax rate and schedule of fees and will strive for public transparency in the establishment of these taxes and fees.
- The town will strive to maintain the tax rate and fees at the lowest possible level to provide the level of services established by the Commission in the annual Budget.
 - The town will strive to educate the public concerning the fact that the Town of Wendell is the only town in Wake County that does not provide municipal fire service and for which fire service is provided through a county fire district and a county fire district tax.
 - Whenever possible, fees will be established at rates that allow those using / benefitting from public services to pay for those services.
 - The tax rates and fee schedule will be reviewed annually as part of the budget development process.
7. Debt Management - The Town will use a balanced approach to funding capital improvements, projects, and vehicle and/or equipment needs.
- The balanced approach will consist of various funding options to include utilizing debt financing, draws on fund balances in excess of policy targets, and current year (pay-as-you-go) appropriations.
 - The general fund debt as a percentage of total assessed value of taxable property should not exceed 2.5%.
 - The ratio of debt service expenditures as a percentage of total general fund expenditures should not exceed 15% with an aggregate ten-year principal payout ratio target of 55% or better.
8. Asset Replacement Schedule - The Town will set forth an outline/criteria for the replacement of Town owned vehicles and equipment in order to ensure that replacement is in the most efficient and cost effective manner.
- The criteria chart (see attached) takes into account age, mileage, condition, services, reliability, and maintenance costs to serves as the general indicator for initiating vehicles and equipment replacement.
 - Each vehicle and piece of equipment accumulates points using the criteria chart. Once all points have been totaled for each vehicle and piece of equipment, a replacement rating will be assigned (Good, Poor, and Priority). The criteria chart (see attached) will provide descriptions of the replacement rating.

The Town of Wendell, NC STRATEGIC PLAN



Vision

Goals

Initiatives

Adopted by the Board of Commissioners February 11, 2019



The Town of Wendell recognizes that the realization of a community vision is only achieved when the strategic goals of the community are in alignment with available and planned resources. As such, the purpose of the strategic plan is to provide for a process that aligns resources with commitment from Town organization leaders to bridge the gap between the assessed current conditions and envisioned community of the future.

SMART Goals

Specific

What **exactly** will you do?

Measurable

How will you know if you **meet** your goal?

Achievable

What **steps** are you going to take to reach your goal?

Relevant

What about your goal makes it **important** to you?

Timely

When do you want to complete your goal?

The *2019 Town of Wendell Strategic Plan* represents a compilation and prioritization of the annual strategic planning sessions for 2016 through 2018. The strategic planning sessions include input from the Board and staff to develop the Town Vision Statement and policy goals incorporated into this document.

The Town organization is committed to SMART goal principles to establish actionable outcomes that are linked to long-term financial planning. Through the strategic planning process, the Town Commission works with community stakeholders to provide policy direction for implementation by the Town Manager and staff in partnership with the citizens and organization that call Wendell home.

Initiatives are identified to be advanced within the annual planning period. While not all goals can be finished in one year, action items identify limitations and expectations of management-in-progress that are timely.

Wendell Board of Commissioners

(Left to Right)

Jason Joyner, Commissioner
 John Boyette, Commissioner
 David Myrick, Commissioner
 Virginia Gray, Mayor
 Dr. Jon Lutz, Mayor Pro-Tem
 Ben Carroll, Commissioner





Vision Statement for the Town of Wendell

“The Town of Wendell is clean, safe, vibrant, and full service with a diverse population. Our citizen friendly reputation is assured by the quality of our facilities and professional staff who work efficiently to provide great customer service. We have a knowledgeable Town Board who works efficiently to incorporate input from Citizen Advisory Boards and staff to be responsible stewards of our tax dollars, through leveraging, by watching return on investments and maintaining our fund balance.”

In working to achieve this vision for the Town of Wendell, the Board of Commissioners have committed to the following:

- **Strive for efficiency** in the way we handle business. We are hard-working and attend all meetings.
- Keep the **best interests of the Town** uppermost in our minds.
- Consider all aspects of a situation and make **thorough, deliberate, and well-reasoned decisions**.
- **Explore all viewpoints**. We are open to hearing from others, learning from them and compromising, when needed.
- **Stay cohesive, collaborative, collegial, and connected** to the manager and to each other.
- **Demonstrate respect for all opinions**, especially in public. And we support the decisions of the Board. Once decisions are made by the majority, we support that decision.
- Tackle **new and novel ideas** and processes.



POLICY GOALS

Policy goal areas are intentionally broad and are used to identify the most critical issues facing the community. Each policy goal has specific action initiatives that are prioritized annually to assist in the allocation of resources and staff time to ensure efficiency and effectiveness. The policy goal areas identified include the following:

- **GOAL 1: Downtown Vibrancy, Economic Growth, and Community Character**
Promote economic vitality through the development of a vibrant Downtown, economic growth, and unique community character.
- **GOAL 2: Public Safety and Neighborhood Improvement**
Provide for a safe and secure community that nurtures livable and well-maintained neighborhoods that are family friendly.
- **GOAL 3: Infrastructure, Transportation, and the Environment**
Develop and maintain infrastructure and policies to support new growth, improve the quality of life for residents, and provide for a clean and green environment.
- **GOAL 4: Parks, Recreation, Special Events, and Culture**
Establish facilities, events, and programs that connect the community, promote healthy lifestyle opportunities, and culturally engage citizens and visitors.
- **GOAL 5: Organization Culture and Communication**
Build a professional and inclusive Town organization that is fiscally responsible, seeks innovative practices, and values the development of staff.



GOAL 1: Downtown Vibrancy, Economic Growth, and Community Character

GOAL 1: Downtown Vibrancy, Economic Growth, and Community Character

Promote economic vitality through the development of a vibrant Downtown, economic growth, and unique community character.

Downtown vibrancy, economic growth, and community character goal attainment occurs when the following opportunities are realized or conditions exist.

A. Downtown contains a vibrant mix of businesses that are centered on food and beverage, retail, and neighborhood services that attract area residents in coordination with sufficient parking, attractive public spaces, and regular special events to foster the “Small Town, Big Charm” motto.

Management in Progress

1. Conduct a Downtown Engagement Session facilitated by the NC Department of Commerce to receive input from stakeholders and businesses
2. Administer the NC Department of Commerce grant for Downtown improvements related to building façades, utilities, and establishment of the Meet of Main organization.
3. Evaluate opportunities to acquire and/or enhance parking and public spaces Downtown.
4. Provide project updates on Raleigh Public Utilities capital project for water main improvements to enhance communication and reduce business impact.
5. Prepare for the NC Department of Transportation capital project to mill and resurface Third Street in 2019 to enhance communication and reduce business impact.
6. Seek enhancements through the Transportation Alternative Program to improve sidewalk crossing for accessibility and aesthetics.
7. Evaluate downtown streetlight options with Duke Energy to enhance efficiency, improve lighting, and aesthetics.

Strategic Initiatives

1. Seek to implement recommendations developed during the NC Department of Commerce engagement meeting with Downtown stakeholders and businesses.
2. Evaluate existing Downtown grant opportunities, like the façade grant program, and update to reflect goals related to desired uses.
3. Revise the zoning uses for the Downtown area in the Unified Development Ordinance to community and business preference and market needs.
4. Review current special events sponsored by the Town and work with community organizations to enhance existing events and develop a sustainable, year-round event schedule.
5. Establish a Special Event policy and process to guide the use of public space, facilities, and Town resources.
6. Identify opportunities for the mid and long-term use for the Wendell Elementary School property in coordination with Wake County Schools.
7. Identify opportunities for infill housing and commercial development in Downtown and establish a program to promote the potential development or redevelopment projects.



GOAL 1: Downtown Vibrancy, Economic Growth, and Community Character

B. The Town contains an appropriate mix of land uses including the development of commercial, office, and industrial uses to enhance property values, create jobs for residents, and make opportunities available for shopping, services, and products desired by the community and region.

Management in Progress

1. Work with the NC Department of Commerce to facilitate an economic development assessment to establish stakeholder opportunities, community vision, and identify market gaps.
2. Review established economic development plans, strategies, and programs to identify opportunities to attract commercial and industrial development.
3. Participate in the Triangle J Council of Governments Brownfields Coalition to submit a grant application to the EPA Brownfield Program to assess brownfield properties in the region.

Strategic Initiatives

1. Update the economic development strategic plan to reflect the NC Department of Commerce vision, stakeholder, and engagement sessions to include an action plan for implementation.
2. Evaluate the establishment of either an in-house, contract, or hybrid service delivery for economic development.
3. Develop marketing material and service level data to assist in economic recruitments and annexation.
4. Establish a Wendell Falls Corridor Action Plan to encourage appropriate development, connectivity, and infrastructure extension.
5. Establish a broadband policy and action plan.
6. Work with Newland Communities and area health systems to encourage the development of a hospital and medical park in the Wendell Falls commercial district or other suitable location.
7. Conduct a comparative growth analysis with area jurisdictions to determine best practices and avoidable issues related to growth to maintain a positive quality of life.
8. Establish growth boundaries with Archer Lodge and Rolesville.
9. Complete a small area plan with a focus on connecting Downtown to major interchanges to evaluate opportunities and impediments to development, annexation, public facilities, and preservation.
10. Initiate planning to update the Comprehensive Land Use Plan and update associated development and transportation plans to incorporate the update.



GOAL 2: Public Safety and Neighborhood Improvement

GOAL 2: Public Safety and Neighborhood Improvement

Provide for a safe and secure community that nurtures livable and well-maintained neighborhoods that are family friendly.

Public safety and neighborhood improvement goal attainment occurs when the following opportunities are realized or conditions exist.

A. Develop an environment for community engaged policing and code enforcement that emphasizes maintaining safe, family friendly neighborhoods, improving the public environment for accessibility, and encouraging community ownership in improving private property.

Management in Progress

1. Include police officer involvement in special events, school activities, and other civic engagements to encourage interaction and relationship building with citizens.
2. Conduct a comparative analysis of community improvement programs to seek a neighborhood driven solution for engagement, housing repair, and aesthetic improvement.
3. Review the temporary sign provisions and waiver to evaluate the benefit of business advertising versus sign clutter and aesthetic impact on neighborhoods.
4. Complete a comprehensive review of the use of force policies and update as needed.

Strategic Initiatives

1. Establish an action plan for the police department to achieve Commission on Accreditation for Law Enforcement Agencies (CALEA) accreditation and initiate policy review and development to implement.
2. Identify methods and seek department-wide training to proactively and consistently utilize community engaged policing methods.
3. Identify opportunities to improve officer health and safety through the promotion of physical fitness, use of employee assistance programs, ergonomic equipment, and like practices.
4. Seek opportunities and programs to improve traffic and pedestrian safety near school sites.
5. Evaluate the towing rotation policy and parking enforcement practices to incorporate Wendell Falls streets and Downtown event parking.
6. Expand officer participation in Crisis Intervention Training to expand existing capabilities beyond the supervisory level to properly assist persons in crisis receive appropriate agency referrals.
7. Partner with external stakeholders to address illegal drug (opioid) issues in the community to include enforcement and referral to treatment and support opportunities as the problems are identified.
8. Develop a pilot project for a "neighborhood clean-up day" to connect citizens in-need to resources for home and yard improvements, encourage voluntary efforts, and improve public spaces for a targeted geographic area.
9. Evaluate housing stock and identify opportunities to encourage a diversity of housing types, promote infill development, and provide for connectivity, beautification, and park improvements.



GOAL 3: Infrastructure, Transportation, and the Environment

GOAL 3: Infrastructure, Transportation, and the Environment

Develop and maintain infrastructure and policies to support new growth, improve the quality of life for residents, and provide for a clean and green environment.

Infrastructure, transportation, and the environment goal attainment occurs when the following opportunities are realized or conditions exist.

A. Public utilities, land, services, and open spaces are designed, maintained, and extended to provide for necessary water, sewer, stormwater, roads, sidewalks, bikeways, paths, intersections, facilities, and debris removal for the existing and planned community.

Management in Progress

1. Evaluate the water and sewer system merger and seek feasible options with CORPUD for an early merger opportunity to reduce utility rates while maintaining needed access to capacity.
2. Compare infrastructure rates with area municipalities for inclusion in the budget.
3. Identify stormwater program compliance requirements with costs for inclusion in the budget.
4. Implement a street repaving program to regularly resurface Town streets and pave unimproved roads.
5. Support the completion of the NCDOT Old Battle Bridge replacement bridge project in 2019.
6. Identify next steps for the U-5323 NCDOT intersection realignment project to determine continued liabilities and options to resolve.
7. Establish a sidewalk maintenance and extension program to implement the Pedestrian Plan.
8. Prepare for the design and funding submission for the Wendell Boulevard Sidewalk Project.

Strategic Initiatives

1. Establish an infrastructure plan for the connection and extension of water and sewer for inclusion in the capital improvement plan to promote development, annexation, and close service gaps.
2. Evaluate the water allocation policy for efficiencies in cost and providing necessary infrastructure to encourage appropriate growth.
3. Complete a review of comparative stormwater practices and programs and present a recommended program that includes a prioritization of needed projects and maintenance of existing infrastructure.
4. Seek opportunities to improve the Transportation Plan to balance necessary improvements to occur in a timely manner with economic development, including the Wendell Boulevard widening.
5. Prioritize and prepare intersection improvements for NCDOT and CAMPO funding processes.
6. Establish an eligible projects list for transportation, bike, and pedestrian improvements through CAMPO administered funding sources for inclusion in future capital improvement plans.
7. Establish a facility and lands prioritization list to identify future acquisition needs with funding strategies for inclusion in the capital improvement plan.
8. Submit the Wendell Boulevard Sidewalk Project to CAMPO in FY 2020 for construction in FY 2021.
9. Identify new bus stops and work with regional transit partners to develop implementation strategies.
10. Review solid waste service levels and contract for efficiencies and service improvement options.



GOAL 4: Parks, Recreation, Special Events, and Culture

GOAL 4: Parks, Recreation, Special Events, and Culture

Establish facilities, events, and programs that connect the community, promote healthy lifestyle opportunities, and culturally engage citizens and visitors.

Parks, recreation, special events, and culture goal attainment occurs when the following opportunities are realized or conditions exist.

A. Provide recreation amenities and services to residents and visitors through quality facilities, a diverse program offering, varied parks, and special events guided by a community-driven master plan that provides for accessibility, connectivity and healthy fun for all.

Management in Progress

1. Initiate a comprehensive parks and recreation master plan to guide future recreation services and facility needs.
2. Provide for the installation of shade structures at the Town park.
3. Establish a parks maintenance plan to include staff resources needed to sustain current programming.
4. Work with the Meet on Main group to coordinate a year-round special event schedule.
5. Prepare a lease for the 122 Second Street property for use as a historic museum.
6. Revise athletic program offerings to meet current seasonal demands to increase field use.

Strategic Initiatives

1. Complete the development and plan for implementation of a comprehensive parks and recreation master plan to guide future recreation services and facility needs.
2. Evaluate the fee-in-lieu policy for parks in the Unified Development Ordinance (UDO).
3. Identify and provide for the acquisition for the next active recreation site identified in the parks and recreation master plan.
4. Update the park plan for the Wendell Town Park to identify next steps for the use of the “new” areas.
5. Develop a plan to link Wendell Falls to Downtown and the Park by greenway that allows for multiple transportation alternatives.
6. Evaluate the transition of Main Street Extension to a greenway connector to Downtown rather than a street for vehicles.
7. Initiate planning for signature special events to ensure sustainability, maintain attendee interest, and provide for appropriate growth.
8. Coordinate the development of a new Wendell Branch Library with Wake County to include space for historic preservation and community group meetings.
9. Identify methods to incorporate sports tourism and visitor marketing for awareness of special events and recreation offerings.

GOAL 5: Organization Culture and Communication



GOAL 5: Organization Culture and Communication

Build a professional and inclusive Town organization that is fiscally responsible, seeks innovative practices, and values the development of staff.

Organization culture and communication goal attainment occurs when the following opportunities are realized or conditions exist.

A. Build an organization committed to improving daily towards a goal of excellence in service to its citizens, businesses, visitors, and employees through responsible fiscal management, inclusive communication, innovative technologies, and professional development.

Management in Progress

1. Maintain a fiscally conservative approach in the review of comparative tax and utility rates for inclusion in the budget.
2. Establish a capital improvement plan that incorporates a capital budget with a capital funding reserve that identifies revenues, preserves the fund balance policy, and incorporates debt service.
3. Enhance the budget document to provide greater detail and transparency on department expenses and how they connect to strategic initiatives.
4. Complete a comparative staffing needs analysis that is updated annually to assist in budget development and to guide organization growth over the next five to fifteen year period.
5. Identify existing work performance data collected by the departments, establish levels of service, and incorporate performance goals tying service levels to strategic goals in the budget process.
6. Complete the analysis of the IT program to consider both efficiencies and organization growth needs.
7. Evaluate current communications like the Snapshot and weekly update to ensure that information is tied to organization performance and strategic goals to be of value to the reader.

Strategic Initiatives

1. Maintain GFOA financial reporting recognition and seek recognition for the budget submission as well.
2. Establish a quarterly (at least) update of strategic initiatives that includes the responsible party and timelines.
3. Evaluate current department policies and practices to enhance efforts to improve customer service.
4. Establish an online agenda that includes background materials and the opportunity for public comment.
5. Develop a communication plan to market Wendell to external interests and increase communication for internal interests.
6. Establish biannual retreats for the Commission and a biennial strategic planning process that provides for community and stakeholder input.
7. Determine requirements for compliance with the Americans with Disabilities Act, as amended, and prepare a transition plan as necessary for facilities, infrastructure, programs, and communications.
8. Complete a review of the Charter and procedural rules of the Commission.
9. Evaluate human resource policies for overtime, insurance selection, employee evaluation, compensation, comparative benefits, and training programs.

Prioritization of Strategic Plan Initiatives

At the February 2019 Budget Retreat, the Board of Commissioners participated in a facilitated exercise to prioritize the strategic initiatives. Members selected a set number of initiatives that mattered most to them individually. The members shared their initiatives to develop Board priorities. Top Priority initiatives received five or six votes (consensus) and High Priority initiatives received three or four votes (voting majority). While all the initiatives are important, the prioritization allows staff to appropriately allocate resources and budget requests to maximize policy implementation.

The FY 2020 Budget is developed to maximize opportunities to achieve the strategic goals of the community through the allocation of available and planned resources. Details are provided to outline how the budget is designed to advance the adopted Strategic Plan.

The priorities and budget implementation for each goal are as follows:

GOAL 1: Downtown Vibrancy, Economic Growth, and Community Character

TOP PRIORITY INITIATIVES

1. Identify opportunities for infill housing and commercial development in Downtown and establish a program to promote the potential development or redevelopment projects.
2. Establish a Wendell Falls Corridor Action Plan to encourage appropriate development, connectivity, and infrastructure extension.

HIGH PRIORITY INITIATIVES

1. Review current special events sponsored by the Town and work with community organizations to enhance existing events and develop a sustainable, year-round event schedule.
2. Identify opportunities for the mid and long-term use for the Wendell Elementary School property in coordination with Wake County Schools.
3. Evaluate the establishment of either an in-house, contract, or hybrid service delivery for economic development.
4. Work with Newland Communities and area health systems to encourage the development of a hospital and medical park in the Wendell Falls commercial district or other suitable location.

IMPLEMENTING GOAL 1 IN THE BUDGET

- Downtown Parking (\$300,000) improvement in FY 2022.
- NCDOT sidewalk crossing improvements (\$40,000 total) in FY 2020 and FY 2021.
- Downtown streetlight maintenance and repair (\$3,500 increase) in FY 2020.
- Façade Grant program funding (\$10,000) in FY 2020.
- TJCOG Regional Brownfield Program (\$8,000) in FY 2020.
- Contract Economic Development Program (\$30,000) in FY 2020.
- Comprehensive Land Use Plan Update (\$120,000 total) in FY 2020 and FY 2021.

GOAL 2: Public Safety and Neighborhood Improvement

TOP PRIORITY INITIATIVES

1. Establish an action plan for the police department to achieve Commission on Accreditation for Law Enforcement Agencies (CALEA) accreditation and initiate policy review and development to implement.
2. Identify opportunities to improve officer health and safety through the promotion of physical fitness, use of employee assistance programs, ergonomic equipment, and like practices.

HIGH PRIORITY INITIATIVES

1. Seek opportunities and programs to improve traffic and pedestrian safety near school sites.
2. Expand officer participation in Crisis Intervention Training to expand existing capabilities beyond the supervisory level to properly assist persons in crisis receive appropriate agency referrals.

IMPLEMENTING GOAL 2 IN THE BUDGET

- Position for CALEA accreditation in salary line to start in January in FY 2020.
- Funding for CALEA training and program in FY 2020.
- Training and education (\$14,920 increase) in FY 2020.
- Health club membership reimbursement program (\$6,000) in FY 2020.
- Employee assistance program (EAP) for all employees (\$9,000) in FY 2020.
- Overtime line added (\$6,000) in FY 2020.
- Wendell Boulevard Sidewalk Project (\$1,485,000) in FY 2020 and FY 2021.

GOAL 3: Infrastructure, Transportation, and the Environment

TOP PRIORITY INITIATIVES

1. Establish an infrastructure plan for the connection and extension of water and sewer for inclusion in the capital improvement plan to promote development, annexation, and close service gaps.
2. Prioritize and prepare intersection improvements for NCDOT and CAMPO funding processes.

HIGH PRIORITY INITIATIVES

1. Evaluate the water allocation policy for efficiencies in cost and providing necessary infrastructure to encourage appropriate growth.
2. Seek opportunities to improve the Transportation Plan to balance necessary improvements to occur in a timely manner with economic development, including the Wendell Boulevard widening.
3. Establish a facility and lands prioritization list to identify future acquisition needs with funding strategies for inclusion in the capital improvement plan.

IMPLEMENTING GOAL 3 IN THE BUDGET

- Fee comparison added to Budget in FY 2020.
- Stormwater contract (\$9,000 increase) and drainage maintenance (\$3,950 increase) in FY 2020.
- Street repaving (\$539,243 total) in CIP.
- Sidewalk program (\$1,700,000 total) in CIP to implement part of 2017 Pedestrian Plan.
- Wendell Boulevard Sidewalk Project (\$1,485,000) in FY 2020 and FY 2021.
- Intersection improvements in the Wendell Boulevard Sidewalk and ADA compliance projects.

GOAL 4: Parks, Recreation, Special Events, and Culture

TOP PRIORITY INITIATIVES

1. Complete the development and plan for implementation of a comprehensive parks and recreation master plan to guide future recreation services and facility needs.
2. Identify and provide for the acquisition for the next active recreation site identified in the parks and recreation master plan.
3. Develop a plan to link Wendell Falls to Downtown and the Park by greenway that allows for multiple transportation alternatives.

HIGH PRIORITY INITIATIVES

1. Initiate planning for signature special events to ensure sustainability, maintain attendee interest, and provide for appropriate growth.

IMPLEMENTING GOAL 4 IN THE BUDGET

- Parks and Recreation Master Plan (in-process) to be completed in FY 2020.
- Parks Maintenance Technician position in Parks and Recreation salary line in FY 2020.

- Park land acquisition (\$400,000) in FY 2021.
- New park construction (\$500,000) in FY 2022.
- Wendell Park Improvement (\$25,500) in FY 2020.
- Multi-Purpose Trail (\$500,000) in FY 2022.

GOAL 5: Organization Culture and Communication

TOP PRIORITY INITIATIVES

1. Establish a quarterly (at least) update of strategic initiatives that includes the responsible party and timelines.
2. Complete a review of the Charter and procedural rules of the Commission.
3. Evaluate human resource policies for overtime, insurance selection, employee evaluation, compensation, comparative benefits, and training programs.

HIGH PRIORITY INITIATIVES

1. Evaluate current department policies and practices to enhance efforts to improve customer service.
2. Develop a communication plan to market Wendell to external interests and increase communication for internal interests.

IMPLEMENTING GOAL 5 IN THE BUDGET

- No tax increase or borrowing proposed in FY 2020.
- Capital improvement program with fund balance compliance in FY 2020 budget document.
- Additional transparency and detail connecting policy to expenses in FY 2020 budget document.
- Staffing needs analysis included in the FY 2020 budget document.
- Performance measurements and goals established in FY 2020 budget document.
- Communication plan with Contract Services and Administration staff (\$4,000) in FY 2020.
- ADA compliance for intersections and sidewalks (\$40,000 total) in FY 2020 and FY 2021.
- Overtime budgets added in Public Works (\$6,000) and Police (\$6,000) in FY 2020.
- Employee Assistance Program (EAP) for all employees (\$9,000).
- Compensation and Classification Study (\$8,250) in FY 2020.
- Organization training emphasized (\$32,145 total increase for all departments) in FY 2020.

Budget Summary

The Budget Summary provides the descriptive overview of the funds used by the Town through the preparation of the Budget Ordinance as required by the Local Government Budget and Fiscal Control Act (LGBFCA). Following the ordinance is the budget overview for all funds that shows the fund structure and the relationship of departments to the funds. The Revenues by Type section describes the major revenue sources and explains the assumptions and trends used to establish the revenue estimates. Likewise, expenditures are evaluated by functional area to show trends and statistics. As a provider of municipal public service, personnel costs related to the recruitment and retention of talent is a primary cost center. As such, the Budget Summary includes a staffing history, analysis, and positions authorized in the budget.



TOWN OF WENDELL
FISCAL YEAR 2019-2020 BUDGET ORDINANCE
O-07-2019

BUDGET ORDINANCE: BE IT ORDAINED BY THE BOARD OF COMMISSIONERS OF THE TOWN OF WENDELL, NORTH CAROLINA THAT:

Section 1: The following accounts are hereby appropriated to the fund set forth for the operation of the town government and its activities for the fiscal year beginning July 1, 2019, and ending June 30, 2020, in accordance with the chart of accounts heretofore established for this town:

CODE	GENERAL FUND	AMOUNT
10-410	Governing Body	\$ 100,200
10-420	Administration	\$ 380,900
10-430	Information Technology	\$ 160,760
10-440	Finance	\$ 333,100
10-450	Economic Development	\$ 48,600
10-490	Community Development/Planning	\$ 422,200
10-500	Public Buildings & Ground	\$ 350,840
10-510	Police - Law Enforcement	\$ 1,923,014
10-530	Fire Services	\$ 4,900
10-560	Public Works	\$ 1,906,710
10-570	Powell Bill	\$ 175,000
10-620	Parks and Recreation	\$ 795,377
10-660	Non-Departmental	\$ 923,665
10-690	Special Appropriations	\$ 2,500
<i>FUND SUBTOTAL</i>		<u>\$ 7,527,766</u>
 WATER and SEWER FUND		
30-660	Non-Departmental	\$ 50,000
32-660	Non-Departmental	\$ 450,000
<i>FUND SUBTOTAL</i>		<u>\$ 500,000</u>
 TOTAL FUND ALLOCATIONS		 <u><u>\$ 8,027,766</u></u>

Section 2: It is estimated, and therefore appropriated, that the following revenues will be made available to the respective funds for the fiscal year beginning July 1, 2019 and ending June 30, 2020, as follows:

CODE	FUND	AMOUNT
10	General Fund	\$ 7,527,766
30 & 32	Water and Sewer Fund	\$ 500,000
 TOTAL FUND ALLOCATIONS		 <u><u>\$ 8,027,766</u></u>

Section 3: That found included in Section 1 of this ordinance are appropriations in an amount of \$397,100 from the General Fund; \$50,000 from the Water Fund and \$450,000 from the Sewer Fund which are payments for the following long-term capital debt service payments during FY 2019-20:

ACCOUNT	DEBT SERVICE DESCRIPTION	AMOUNT
10-570-4400	Street and Drainage Improvement Projects	\$ 139,600
10-660-9100	Open Space, Equipment and Facility Improvements	\$ 257,500
30-660-9100	Water Bond and Clean Water Loan	\$ 50,000
32-660-9100	Sewer Bond and Buffalo Creek Loan	\$ 450,000
TOTAL \$		<u>897,100</u>

Section 4: There is hereby levied an Ad Valorem Tax of forty-nine cents (\$0.49) per one hundred dollar (\$100) valuation of taxable property for the purpose of raising a portion of the revenue listed in the General Fund appropriation in Section 2 of this Ordinance. This rate is based upon an estimated county assessed valuation of \$670,700,000 for the Town of Wendell and an estimated collection rate of 98.64%.

Section 5: Community Development/Planning fees are remitted to the Town at the time application is submitted for consideration.

Section 6: Parks and Recreation fees are to be remitted prior to participation in the program.

Section 7: Fees related to removal of solid waste will be charged on a monthly or case by case basis dependent upon the type of materials involved with payments remitted in accordance with the approved fee schedule.

Section 8: Copies of this Budget Ordinance and accompanying document shall be furnished to the Town Clerk, Budget Officer, and other Department Heads of the Town of Wendell to be kept on file by them for their direction in the disbursement of funds.

Upon introduction of this Ordinance by Commissioner _____ this ordinance is hereby adopted this 28th day of May, 2019.

Ayes:

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Nays:

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Absent:

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Virginia Gray - Mayor

Megan Howard - Town Clerk

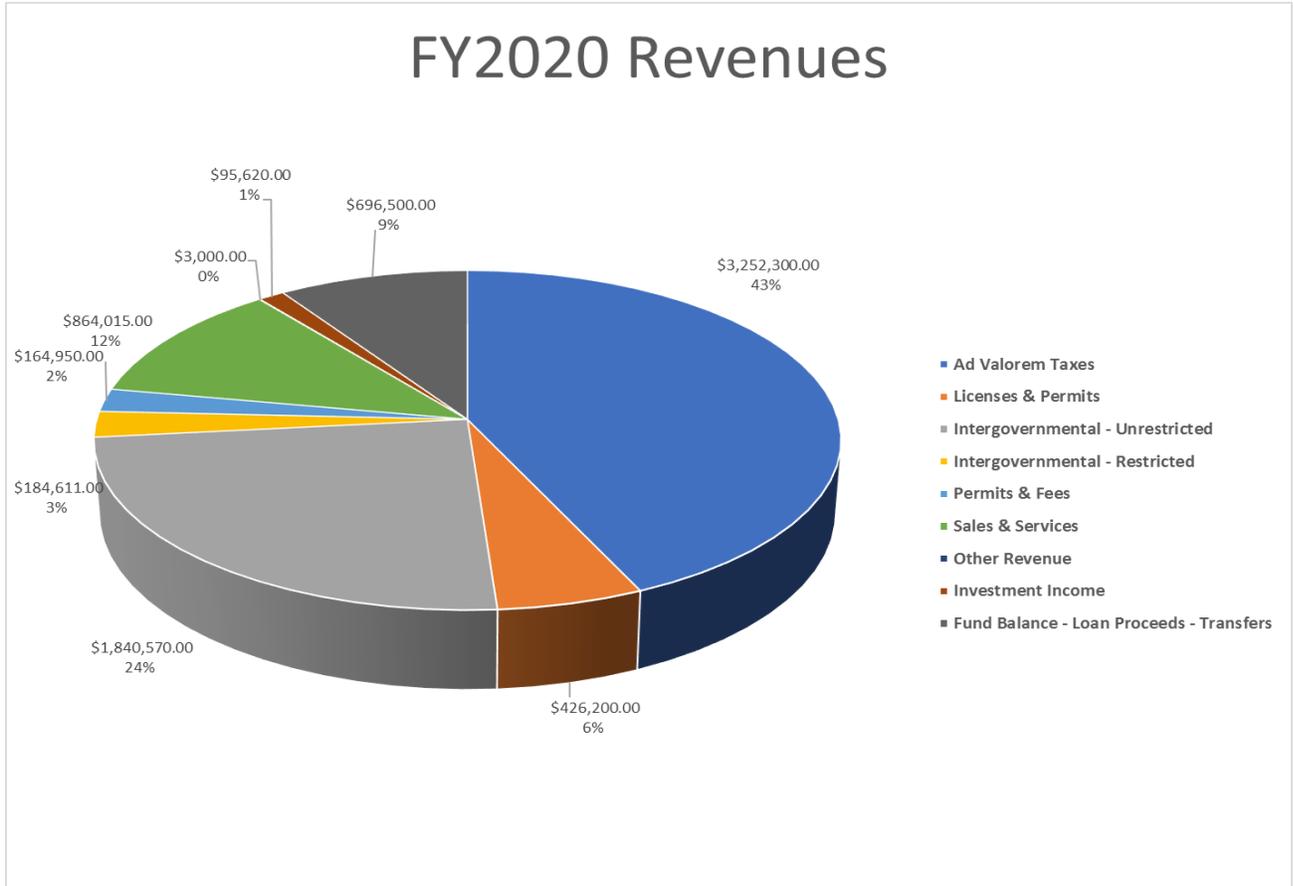
Budget Overview – All Funds

The Town of Wendell is served by three funds; the General Fund, the Water Fund, and the Sewer Fund. The General Fund provides the revenues and expenses for all operating departments and expenses of the Town other than the retirement of water and sewer debt. The Water Fund and Sewer Fund only provide debt service payments and do not provide or receive transfers from other funds.

Budget Overview - All Funds		
General Fund	Revenues:	
	Ad Valorem Taxes	3,252,300
	Licenses & Permits	426,200
	Intergovernmental - Unrestricted	1,840,570
	Intergovernmental - Restricted	184,611
	Permits & Fees	164,950
	Sales & Services	864,015
	Other Revenues	3,000
	Investment Income	95,620
	Fund Balance Transfer	696,500
	Total:	7,527,766
	Expenses:	
	Governing Body	100,200
	Administration	380,900
	Information Technology	160,760
	Finance	333,100
	Economic Development	48,600
	Planning	422,200
	Public Buildings & Grounds	350,840
	Police	1,923,014
	Fire Services	4,900
Public Works	1,906,710	
Powell Bill - Local Roads Program	175,000	
Parks & Recreation	795,377	
Non-Departmental	923,665	
Special Appropriations	2,500	
Total	7,527,766	
Water Fund	Revenues - City of Raleigh	50,000
	Expenses - Debt Service	50,000
Sewer Fund	Revenues - City of Raleigh	450000
	Expenses - Debt Service	450000
Total Funds	Revenues	8,027,766
	Expenses	8,027,766

Revenues by Type – Descriptions, Trends, and Assumptions

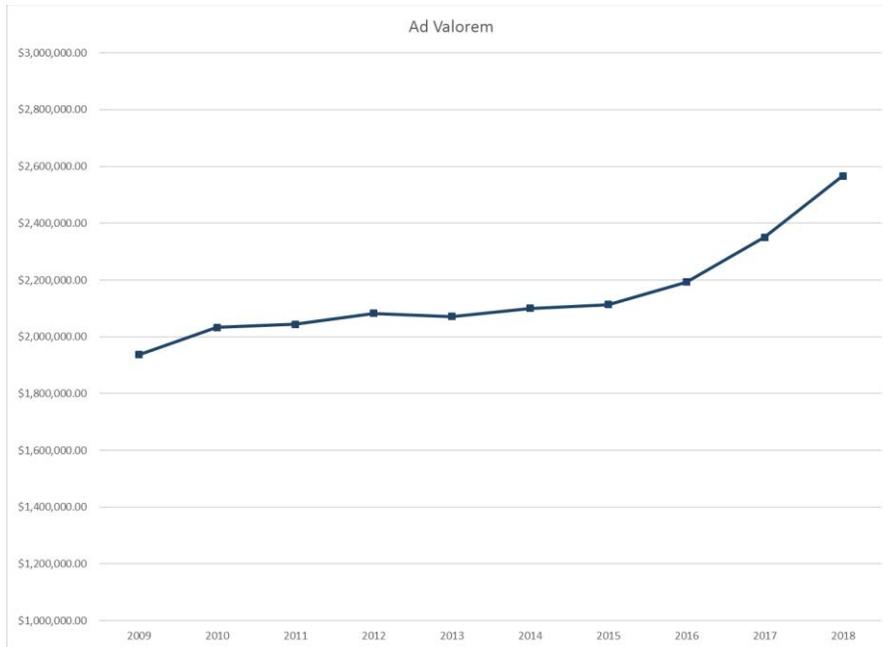
A summary of revenues by type for FY 2020 is provided followed by revenue descriptions, trends, and assumptions.



AD VALOREM TAXES

Taxes Ad Valorem

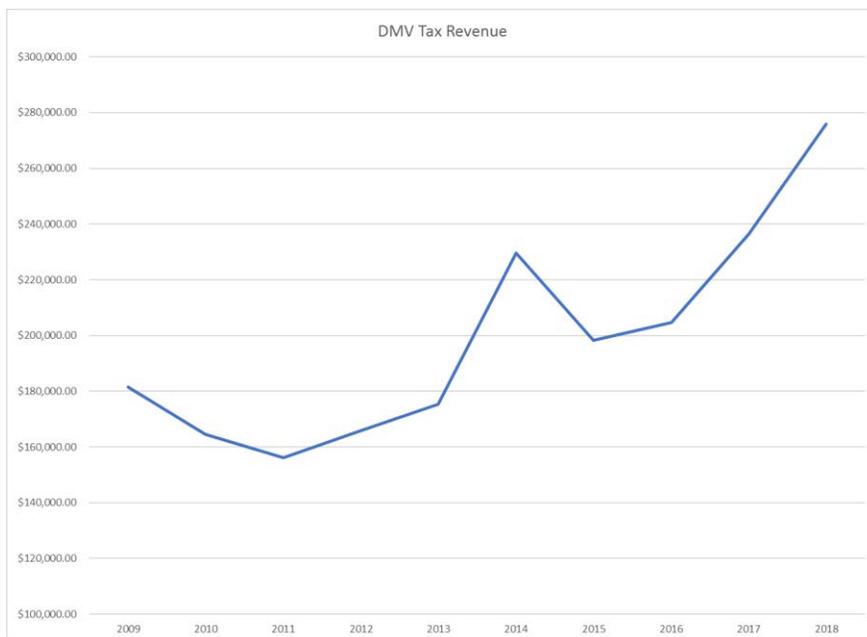
Ad valorem taxes are taxes paid on the real and personal property located within the Town’s corporate limits. Taxes for real and personal property are levied based upon the preceding January 1 valuations and the tax rate established by the Town; the adopted tax rate is applied per every \$100 in property valuation. The Town’s estimated budgetary collection rate percentage may not exceed the current year collection percentage. These taxes are billed and collected by Wake County on the Town of Wendell’s behalf and distributed on a weekly basis. Delinquent ad valorem taxes from previous fiscal years and late fee penalties are also distributed with current collections. By the beginning of FY2019-2020, Wendell’s assessed property value is projected to have increased by 17.05% (or \$97,700,00) to \$670,000,000. The Town of Wendell’s property tax rate will be \$0.49 per one hundred dollars (\$100) valuation of property. The Town utilizes an estimated 96.84% collection rate for ad valorem taxes. The total Taxes Ad Valorem is budgeted at \$3,429,700.



TAXES & LICENSES

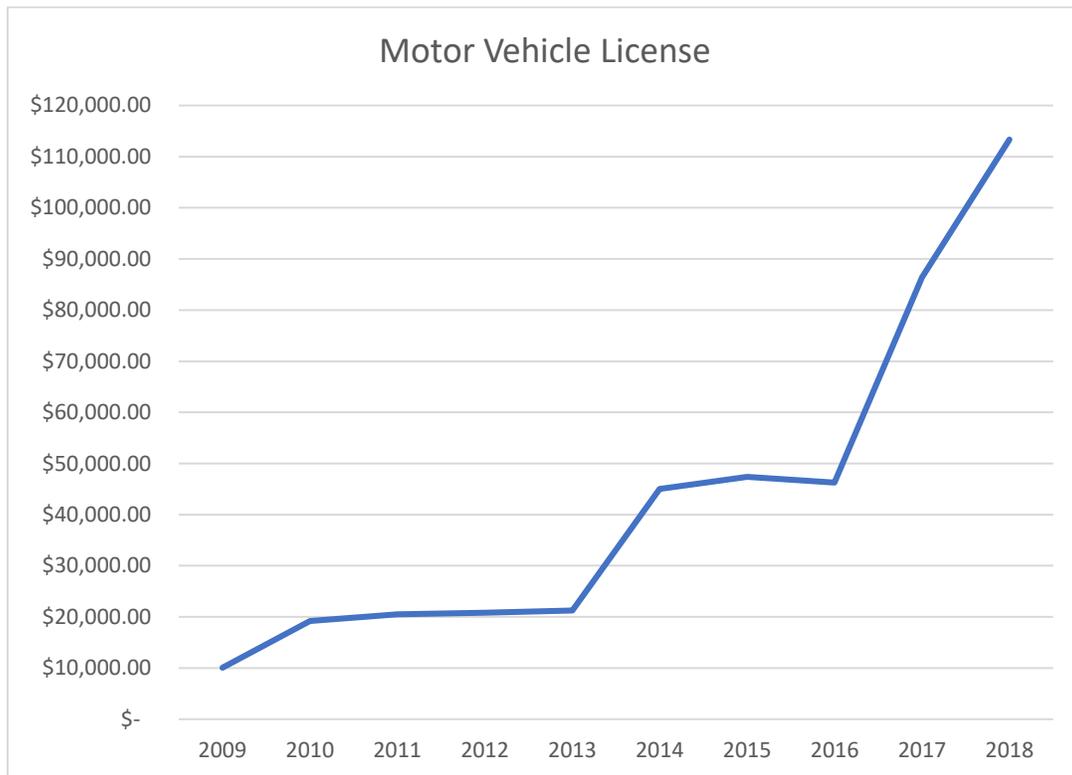
DMV Tax Revenue

Motor vehicle ad valorem taxes are paid on the motor vehicles located within the Town’s corporate limits. Vehicle taxes are billed and collected by the North Carolina Department of Motor Vehicles at the same time as the vehicle registration. Ad valorem taxes are based on growth projections from the Wake County Revenue Department. For FY2019-2020, the Town anticipates receiving \$305,000 in DMV Tax Revenue; this represents an increase of \$34,130 (or 12.6%) from FY2018-2019. A large majority of this can be attributed to the overall growth the Town of Wendell is experiencing. An improving economy is also suspected to play a role in this revenue increase; citizens of Wendell can replace their older vehicles with newer ones, increasing the overall DMV Tax Revenue pool.



Motor Vehicle License

By local act, the Town is authorized to levy a motor vehicle license tax of up to \$20 on any vehicle residing in the jurisdiction. This tax is billed and collected by the North Carolina Department of Motor Vehicles in conjunction with the annual property tax bill. Annual revenues are based on the growth projections from the Wake County Revenue Department. Of the \$20 tax levy, only \$5 may be used for any general purpose; the remaining portion must be used for maintaining, repairing, constructing, reconstructing, widening, or improving public streets that are not part of the State highway system. The Town is anticipating on receiving \$115,000 in Motor Vehicle License fees; this represents an increase of 13.36% or \$13,555. This increase is based on continued growth within the Town of Wendell. An additional factor that influences the increase in anticipated revenues is a more aggressive budgetary figure based on realized revenue increases after a fee increase four fiscal years ago.



Golf Cart Fees

The Town of Wendell Board of Commissioners ordained that Chapter 24 of the Wendell Code of Ordinances be amended to provide clear definition and guidance to ensure the safe operation of golf carts within the town. Low Speed Vehicles, as defined under North Carolina General Statute 20-4.01, and as equipped and regulated under North Carolina General Statute 20-121.1, are not subject to this ordinance; instead they are registered and licensed by the North Carolina Department of Motor Vehicles. Golf cart permit fees are collected at time of application; issuance of the permit is subject to the successful completion of an equipment inspection performed by a Town of Wendell police officer. Issued permits are valid for a period that reflects the Town's fiscal year calendar (July through June) and are subject to renewal annually. Registration fees shall be prorated monthly for first-time registrants. The Town of Wendell is anticipating \$3,000 in Golf Cart Fees. This level of revenues allows for 13 previously issued

permits to not be renewed for FY2020; additional first-time registrants will only further boost this source of revenue.

Beer & Wine License

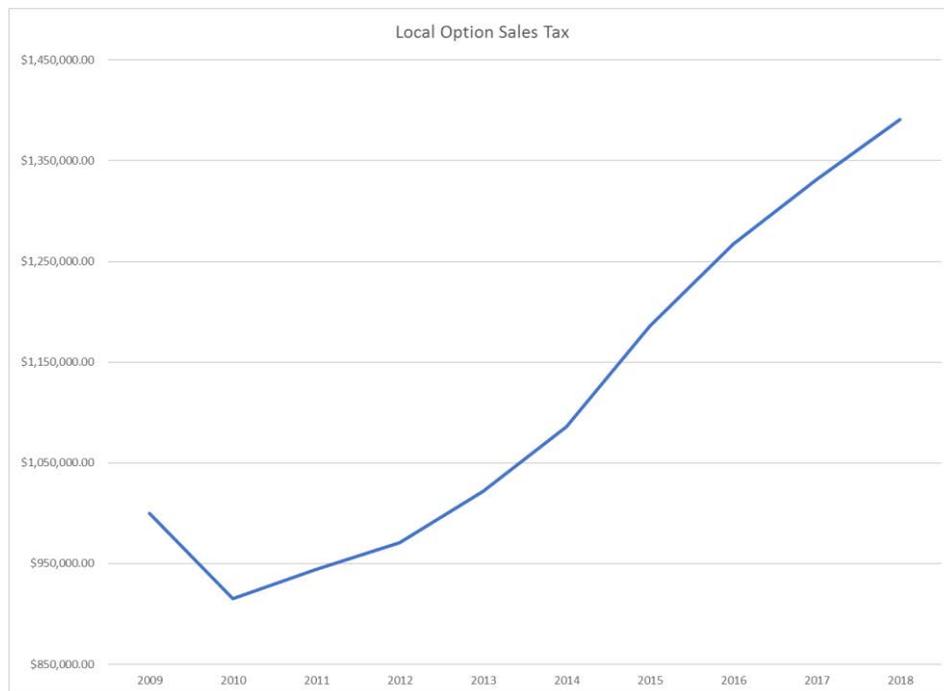
A person holding any of the following retail ABC permits for an establishment located in the Town of Wendell shall obtain from the Town a license for that activity. Licenses permitting the sale of malt beverages for on-premise consumption are levied at an annual tax of \$15; licenses permitting the sale of malt beverages for off-premise consumption are levied at an annual tax of \$5. Licenses permitting the sale of unfortified and/or fortified wine for on-premise consumption are levied at an annual tax of \$15; licenses permitting the sale of unfortified and/or fortified wine for off-premise consumption are levied at an annual tax of \$10. A small budgeting increase of \$75 in Town Beer & Wine Licenses is being implemented for FY2019-2020. This considers the addition of new businesses in Town that may sell beer and/or wine for on- or off-premise consumption.

INTERGOVERNMENTAL

Unrestricted

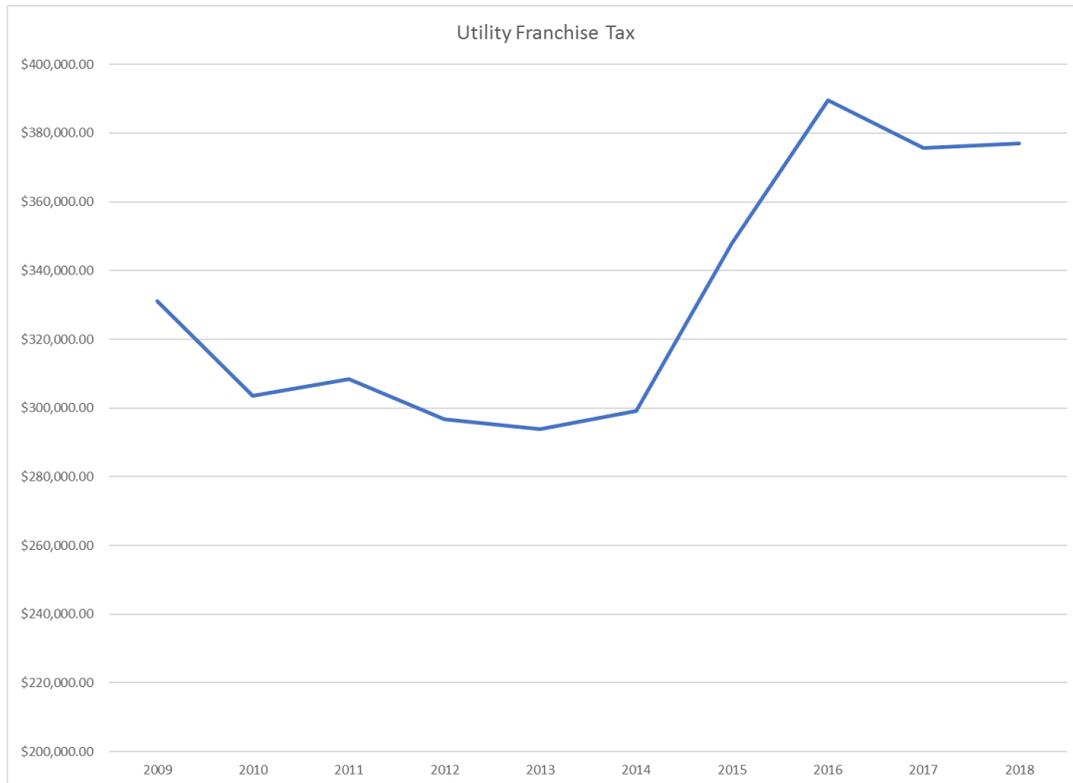
Local Option Sales Tax

The local sales and use taxes are levied by the Wake County Board of Commissioners and is collected by the State of North Carolina on behalf of the County. The local option sales tax rate of 2¢ consists of three separate taxes that are authorized by North Carolina General Statutes: Article 39 1¢ tax, Article 40 ½¢ tax, and Article 42 ½¢ tax. Distributions of these funds are made to the Town monthly on a per capita basis. The North Carolina League of Municipalities is projecting a statewide increase in Local Option Sales Tax of 4.5%. The Town feels that taxes collected in Wake County will exceed the statewide growth; Wendell is budgeting for a 6.62% increase over FY2019's budgeted amount for sales tax to \$1,400,000.



Utility Franchise Tax

The utility franchise tax is a combination of taxes on telecommunications sales, gross receipts of electric power sales, gross receipts of video programming sales, and an excise tax on piped natural gas. The taxes received from gross receipts of video programming sales helps fund the Town’s local PEG channel (local public, educational, or governmental access channel). The State of North Carolina distributes these funds to the Town on a quarterly basis. Utility franchise tax distributions are estimated to grow by 1.71% for FY2019-2020. This estimated growth is primarily driven by a projected increase in the electric power sales portion of the distribution.



ABC Net Revenues

The Wake County Board of Alcoholic Control distributes its net profits to the municipalities located within Wake County. These distributions are made on a quarterly basis in proportion to ad valorem taxes. ABC Net Revenues will be increased from \$17,000 to \$20,000 for FY2019-2020. This increase brings the budgeted revenue source more in line with actual revenues received over the past four fiscal years.

Solid Waste Disposal Tax

The State levies a \$2 per-ton “tipping tax” on municipal solid waste and construction and demolition debris that is deposited in a landfill in the state, or transferred at a transfer station for disposal outside the state. The North Carolina Department of Revenue distributes 18.75% of the taxes collected on a per capita basis. Solid waste disposal taxes are distributed on a quarterly basis. In FY2019-2020, the Town is expecting a slight increase (\$100) in Solid Waste Disposal Tax revenues. This represents a 2.56% increase over FY2018-2019; this is a result of the average growth in this revenue source over the past three fiscal years.

Beer & Wine Tax

The alcoholic beverages tax is an excise tax levied on the sales of malt beverages, unfortified wine, and fortified wine. Malt beverage sales carry an excise tax of 61.71¢ per gallon; unfortified wine sales carry an excise tax of 26.34¢ per liter; fortified wine sales carry an excise tax of 29.34¢ per liter. The excise tax is distributed to all counties and cities in which the retail sale of these beverages is authorized in the entire county or city within 60 days after March 31 of each year. Of the taxes levied, the North Carolina Department of Revenue distributes 20.47% for malt beverages, 49.44% for unfortified wine, and 18% for fortified wine on a per capita basis. Growth of 4.54% is anticipated for annual Beer & Wine Tax distributions. Recently implemented legislature allowing for more alcohol sales and an increase in the Town's population in addition to historic data are contributing factors in this budgetary decision.

Restricted

Powell Bill – Motor Fuels Tax

Powell Bill revenues are distributed to municipalities so long as funds are appropriated as part of the state budget by the North Carolina General Assembly. The Town's annual distributions are based on two factors; seventy five percent is allocated on a per capita basis while the remaining twenty five percent is allocated based on the number of street miles maintained within the Town's corporate limits. The State restricts the use of these funds to primarily the resurfacing of streets. Powell Bill funds are received in two installments per fiscal year. The North Carolina League of Municipalities is predicting a \$0.27 decrease in per capita allocation as well as a \$18.69 decrease in per street mile allocation. The Town of Wendell believes that the per capita growth within the town is enough to compensate for the decrease in allocation rates. The Town is taking a conservative approach to budgeting for Powell Bill revenues for FY2019-2020 by implementing a small increase of \$1,500 (or 0.86%) from \$173,500 to \$175,000.

Grants and/or Matching Funds

Occasionally, the Town of Wendell applies for and receives grant or matching funds from other government agencies. If awarded these funds, the expenditures are typically restricted to one or more specific uses. It is often required that the Town reports its expenditures back to the issuing agency to ensure that the funds are being used appropriately as they were intended. In FY2019-2020, the Town will be re-appropriating \$6,124 in grant funds from a Wake County Board of Alcoholic Control Grant that was received in a previous fiscal year.

PERMITS & FEES

Development/Planning Fees

This revenue is composed of development-related permits and fees charged to developers, builders, and homeowners for new construction and additions/alterations to property. Permit fees are collected upon issuance of the permit. Additionally, revenues are collected for rezoning, special use, and annexation applications; these fees are collected at time of application submittal. A 4.67% increase in Development/Planning Fees from \$114,650 to \$120,000 is anticipated for FY2019-2020. Approximately one-third of the total revenue source is tied to fees related to new single-family home construction. Continued building in existing developments as well as anticipated submittals for new developments and other zoning-related matters drive the increase for this source of revenue.

Sidewalk & Driveway Fees

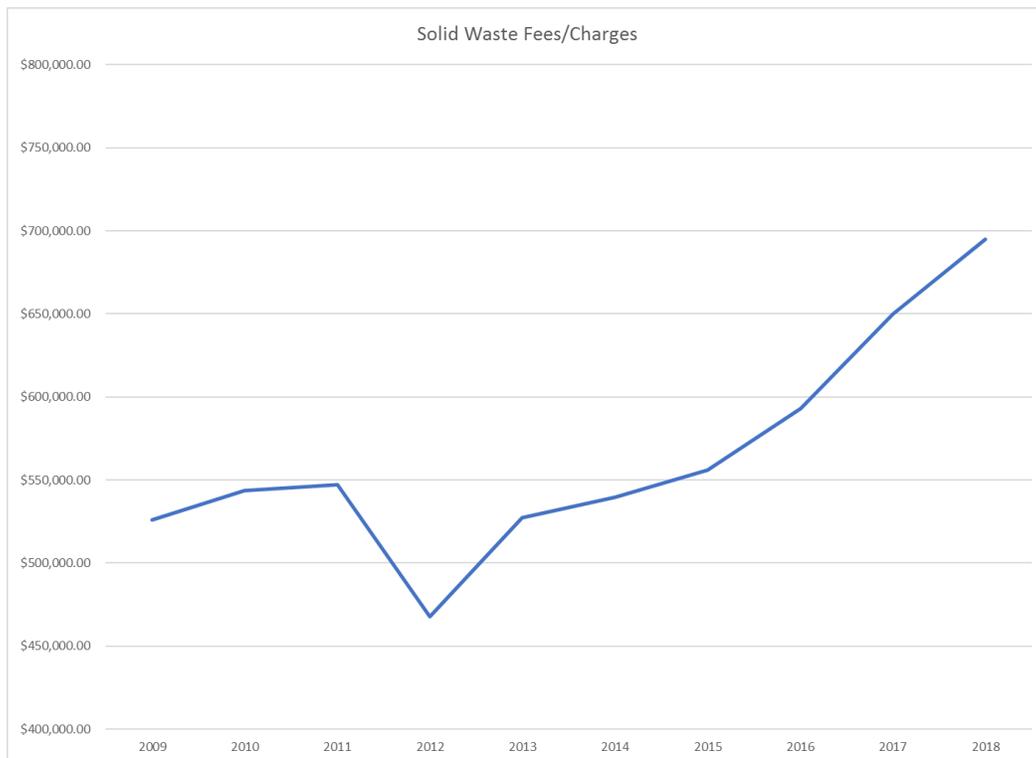
The Town charges a fee for the inspection of sidewalk and driveway installations for new single-family homes. The fee is collected upon the issuance of the building permit for the single-family home. The fee covers two inspection visits. An additional fee is charged for each additional inspection required after the initial two inspections. The Town is anticipating on receiving \$13,000 in Sidewalk & Driveway Fees. To

meet this budgetary goal, the Town will need to issue approximately 18 new single-family home permits per month; this required issuance rate is well within the Town’s current issuance rate.

SALES & SERVICES

Solid Waste Fees

Solid waste fees are billed to and collected from homeowners/residents by the City of Raleigh on a monthly basis as a component of water and sewer bills on behalf of the Town of Wendell. These fees represent the cost recovery of providing curbside garbage, recycling, and yard waste collection to Town residences. State statutes restrict the use of these funds to the provision of solid waste services. The Town anticipates a 1.74% (or \$11,450) increase in Solid Waste Fees for FY2019-2020. This takes into account the Town’s growth rate, which translates into new solid waste accounts, while anticipating reduced revenues due to the collection process in place through the City of Raleigh.



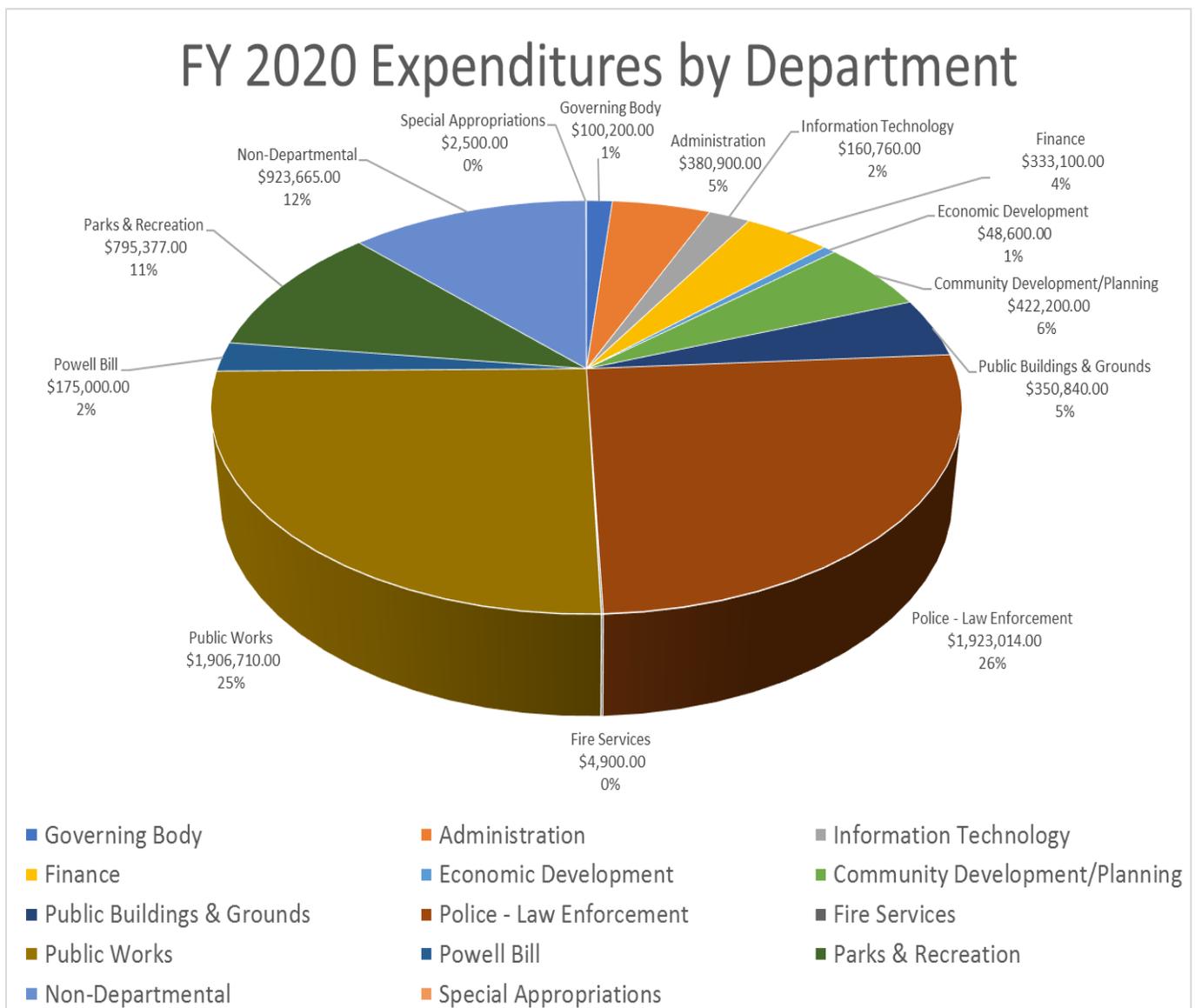
Recreation Fees

The Town of Wendell collects recreation user fees from athletic program registration, facility rentals, track out programming, and other special events to offset costs associated with providing these programs. These fees are collected at various times throughout the fiscal year when different program become available for participation. For FY2019-2020, the Town is anticipating on receiving a total of \$173,150 in recreation-type revenues; this represents a 0.84% increase over the FY2018-2019 budget. The majority of this increase is attributable to the creation of new recreation leagues and programs that were not previously offered by the Parks & Recreation Department; all other aspects of the Parks & Recreation Department are expected to remain at the same level for FY2019-2020.

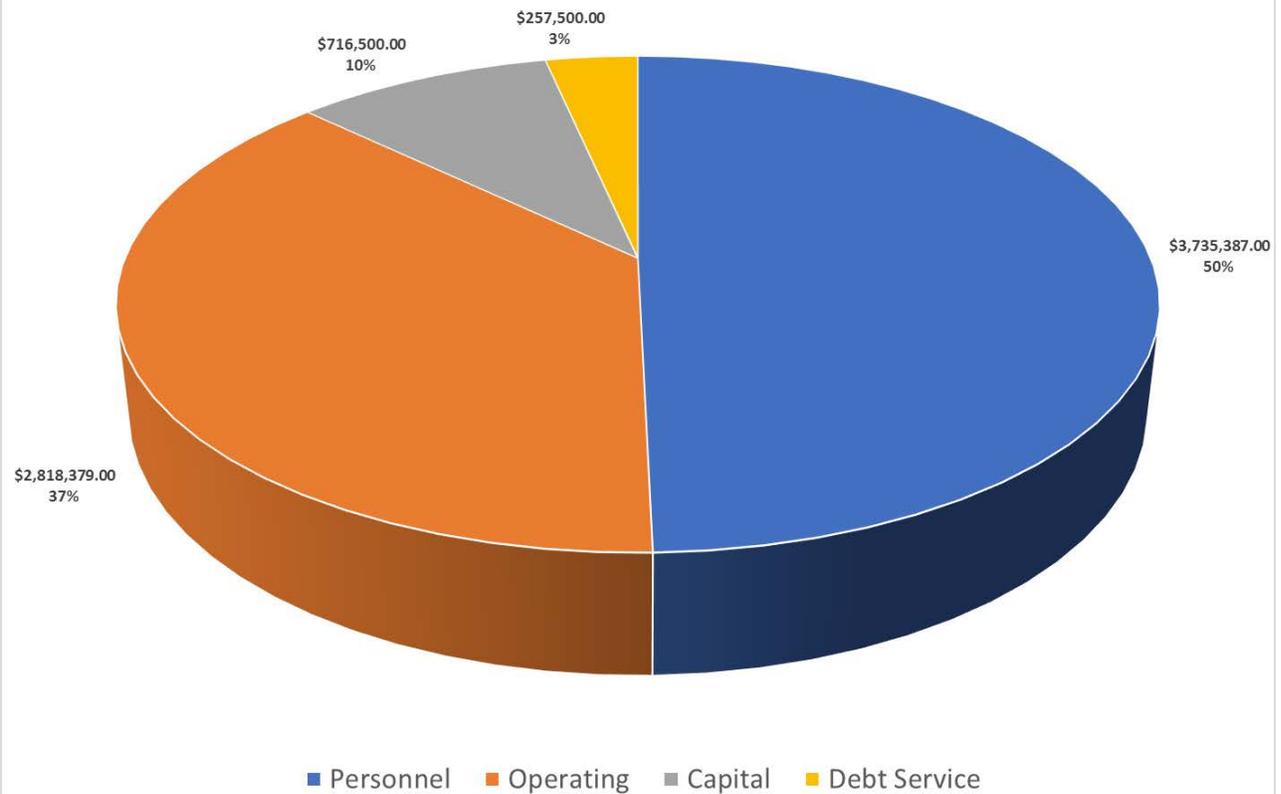
INTEREST ON INVESTMENTS

Municipalities are authorized to invest their idle cash. Funds for investment come from capital and operating revenues and fund balances. State law prescribes the authorized types of investments, and the law reflects the dual policy goals of minimizing the risk of investments and maximizing the liquidity of invested funds. The Town of Wendell heavily utilizes the North Carolina Capital Management trust, a mutual fund for local government investments. The interest earned on investments must be credited proportionately to the funds from which the moneys that were invested came. The amount of investment income the Town earns fluctuates from year to year because of changes in short-term interest rates. The Town expects a 144.37% (or \$56,125) increase in Interest on Investments for FY2019-2020. This large increase can be attributed to an economy that continues to flourish, restructured investment portfolio balances, as well as renegotiated interest rates on depository accounts.

Expenditures by Function (Department and Category)



FY 2020 Expenditures by Category



Staffing Analysis and Authorized Positions

The staff history and proposed positions for FY 2020 are provided in the following chart. The full-time equivalents (FTE) increase from 51 to 55 with additions of a Parks Maintenance Position in Parks and Recreation, and Public Works Specialist in Public Works, and a police officer and records and training administrator in the Police Department.

TOWN STAFF IN FULL TIME EQUIVALENTS*					
Fiscal Years					
Department	2017	2018	2019	2020	FY 2020 New Positions Recommended
Administration	2	2	3	3	No new position
Finance	4	4	4	4	No new position
Information Technology	1	1	1	1	No new position
Parks and Recreation	6	6	6	7	Parks Maintenance Technician
Planning	4	4	4	4	No new position
Police					
Sworn	17	18	19	20	Police Officer
Non-Sworn	1	1	1	2	Records and Training Administrator
Public Works	7	10	13	14	Public Works Specialist
Total Positions	42	46	51	55	

* Excludes temporary and seasonal part-time staff

Following a comparative analysis of communities and organizations like Wendell today and the Wendell of the projected future with growth, a 10-year staff of projection is provided as a planning document. The staffing project is subject to change based on fiscal constraints, differences in projected growth patterns, statutory and policy requirements, and revisions in municipal service provision. The staff project identifies 41 positions for an average of approximately four (4) per year. The plan will be evaluated annually as part of the budget development process based on department requests and an evaluation of the factors influencing staffing needs.

Town of Wendell 10-Year Staff Projection	
FY 2020	FY 2021
Records Manager (PD) Police Officer (PD) Public Works Specialist (PW) Parks Maintenance Technician (P&R)	Risk Manager (Admin) Stormwater Crew Leader (PW) Public Works Specialist (PW) Community Resource Officer (PD) Community Resource Officer (PD)
FY 2022	FY 2023
Fleet Maintenance Technician (PW) Economic Development Specialist (Admin) Purchasing Agent (FIN) Watch Commander (PD) Parks Supervisor (P&R)	Communications Specialist (Admin) Public Works Specialist (PW) Administrative Support Specialist (PLN) Specialty Unit Sergeant (PD)
FY 2024	FY 2025
Human Resource Administrator (Admin) Public Works Specialist (PW) Special Events Coordinator (P&R) Specialty Unit Officer (PD) Specialty Unit Officer (PD)	Assistant Town Manager (Admin) Public Works Specialist (PW) Police Officer (PD)
FY 2026	FY 2027
Streets Supervisor (PW) Administrative Support Specialist (FIN) Police Officer (PD) Public Works Specialist (PW)	Innovation & Technology Director (IT) Public Works Specialist (PW) Police Officer (PD) Parks Maintenance Technician (P&R)
FY 2028	FY 2029
Budget Analyst (FIN) Facilities Supervisor (PW) Police Officer (PD)	Town Engineer (Admin) Public Works Specialist (PW) Watch Commander (PD) Parks Maintenance Technician (P&R)

General Fund

The General Fund identifies and allocates sufficient revenues to cover the costs of the services provided by the departments. Expenses include personnel, operating, and capital expenses for each function of the Town government. The General Fund also provides for the allocation of funds to cover the debt service.

The General Fund includes revenues like property taxes, licenses and permits, intergovernmental, fees, service charges, and other revenues. Cost centers in this fund include the governing body, administration, finance, police, public works, planning, recreation, and other public services.

The first section of the General Fund provides the line item details for each of the revenues and expenses. Each line provides the previous two fiscal years of actual expenses, the current year budgeted amount, the department request, the Town Manager's proposed, and the amount adopted by the Board of Commissioners.

Details for each department follow the line item summary that include (1) a description of the service, (2) revenues attributed to the department (if any), (3) changes for personnel, operating, and capital expenditures, (4) a summary of department expenses, (5) department staffing, (6) prior year achievements, (7) next year's anticipated challenge, (8) and the goals, work units, and performance measures for the department. Performance measurement is new in FY 2020 and data will be collected and reported monthly by the departments. Moving forward, past performance will be measured and evaluated to assist in determining appropriate resources needed to achieve desired community service levels, maintain core services, and track progress towards strategic goals.

The last department report is the General Fund Balance that reports on maintaining savings at a level compliant with the Local Government Commission (8%) and Town policy (40%). These accumulating funds remaining at the end of the year are accounted for in the General Fund Balance reserve. The fund balance reserve policy is to retain a balance of at least 40% when taking the percentage of the non-capital expenses of the proposed budget and the last audited fund balance.

FISCAL YEAR 2020 GENERAL FUND BUDGET - REVENUE AND EXPENDITURE SUMMARY

Account	Account Description	FY 16/17 Actual	FY 17/18 Actual	FY 18/19 Budget	FY 19/20 Requested	FY 19/20 Proposed	FY 19/20 Adopted
REVENUES							
Ad Valorem Taxes							
10-301-0300	Ad Valorem Taxes - Prior Years	5,006	2,677	0	3,000	5,100	
10-301-0400	Ad Valorem Property Tax - Current	2,350,945	2,566,419	2,770,567	3,241,700	3,241,700	
10-301-0500	Tax Penalty & Interest	4,967	5,069	5,450	2,500	4,000	
10-301-0600	Payment in Lieu of Taxes	6,341	3,093	1,100	1,500	1,500	
Total Ad Valorem Taxes		2,367,259	2,577,258	2,777,117	3,248,700	3,252,300	0
Licenses and Permits							
10-301-0700	DMV Tax Revenue	236,377	276,016	270,870	305,000	307,200	
10-319-0000	Auto Decal Fee	86,408	113,343	101,445	115,000	115,300	
10-319-1000	Golf Cart Fees	0	1,324	0	3,000	3,500	
10-325-0000	Beer and Wine (Town)	250	200	125	200	200	
Total Licenses and Permits		323,035	390,883	372,440	423,200	426,200	0
Intergovernmental Revenues - Unrestricted							
10-337-0000	Utility Franchise	375,722	376,903	344,125	350,000	351,800	
10-341-0000	Beer & Wine Tax	28,682	28,296	25,350	26,500	27,350	
10-345-0000	Local Option Sales Tax	1,331,442	1,391,013	1,313,025	1,400,000	1,423,420	
10-347-0000	ABC Net Revenue	19,397	20,593	17,000	20,000	20,000	
10-352-0100	South Wake Landfill Revenue	14,164	14,019	0	14,000	14,000	
10-368-0000	Solid Waste Disposal Tax	4,239	4,429	3,900	4,000	4,000	
Total Intergovernmental Revenues - Unrestricted		1,773,646	1,835,253	1,703,400	1,814,500	1,840,570	0
Intergovernmental Revenues - Restricted							
10-343-0000	Powell Bill Funds	172,344	175,014	173,500	175,000	175,000	
10-380-0000	State Law Enforcement Forfeiture	558	1,328	0	0	0	
10-380-0600	Grant - CDBG Projects	0	36,052	0	0	0	
10-381-0100	Grant - NCLM	5,000	0	0	0	0	
10-381-0400	Grant - Wake ABC	21,000	0	9,082	6,124	6,124	
10-381-0500	Grant - Governor's Crime Commission	0	0	24,206	0	0	
10-381-0700	Grant - PARTF	6,365	192,519	0	0	0	
10-382-0200	NC Works - Career Development Services	0	9,993	0	0	0	
10-382-0300	NCDOT - Mowing	0	1,877	0	3,487	3,487	
10-399-0000	State/Federal Disaster Revenue	0	51,642	0	0	0	
Total Intergovernmental Revenues - Restricted		205,267	468,425	206,788	184,611	184,611	0
Permits & Fees							
10-333-0000	Street Closing Fees	0	0	0	0	0	
10-335-0300	Light Reimbursements	-4,460	0	0	0	0	
10-339-0000	Administrative Invoice Fees	2,352	1,858	1,000	1,000	1,000	
10-350-0000	Raleigh Transaction Fees	1,592	1,644	1,650	1,650	1,650	
10-351-0100	Court Revenue - Officer Fees	2,233	2,167	0	500	750	
10-356-0000	Development/Planning Fees	120,370	138,188	114,650	120,000	120,450	
10-356-0100	Sidewalk & Driveway Fees	0	0	0	12,000	13,000	
10-356-0200	Engineer Review Fees	0	0	0	25,000	26,000	
10-357-0000	Code Enforcement Fees	4,237	1,773	2,100	2,100	2,100	
Total Permit & Fees		126,324	145,630	119,400	162,250	164,950	0
Sales & Services							
10-359-0000	Solid Waste Services	649,905	694,920	658,550	660,000	670,000	
10-361-0000	Cemetery Revenue	1,200	7,200	2,500	2,500	2,500	
10-361-0100	Cemetery Monument Deposit	600	2,400	1,000	1,000	1,000	
10-365-0000	Recreation Revenue	91,765	90,423	78,750	80,000	89,565	
10-365-0100	Recreation Sponsorship	10,220	8,000	4,900	4,900	5,600	
10-365-0200	Recreation Rental Proceeds	40,148	32,110	36,800	37,000	37,600	
10-365-0500	Recreation Revenue - Trackout	60,795	63,089	51,250	51,250	51,250	
10-370-0000	Wake Transit Revenue	0	3,000	0	1,500	1,500	
10-383-0000	Sale of Fixed Assets	1,276	56,182	10,500	5,000	5,000	
Total Sales & Services		855,909	957,324	844,250	843,150	864,015	0

Other Revenues							
10-331-0000	Park Concession Revenue	50	1,260	0	1,200	1,200	
10-332-0000	Facility Rent	1,500	1,500	1,500	1,500	1,500	
10-335-0000	Miscellaneous Revenues	2,877	81	0	0	300	
10-367-0200	Gasoline Tax Refund	0	0	0	0	0	
10-393-0100	Cell Tower Proceeds	0	9,000	0	0	0	
10-399-0100	Insurance Revenue	0	0	0	0	0	
Total Other Revenues		4,427	11,841	1,500	2,700	3,000	0
Investment Income							
10-329-0000	Interest on Investments	32,227	67,884	38,875	95,000	95,620	
Total Investment Income		32,227	67,884	38,875	95,000	95,620	0
Transfers - Fund Balance - Loan Proceeds							
10-381-0100	Loan Proceeds - Equipment	0	0	0	0	0	
10-388-0000	Loan Proceeds - Facilities	2,185,851	507,000	0	0	0	
10-398-0000	Fund Balance Appropriation	18,000	176,970	245,800	694,000	696,500	
10-398-0100	Fund Balance - Powell Bill	0	0	0	0	0	
Total Transfers - Fund Balance - Loan Proceeds		2,203,851	683,970	245,800	694,000	696,500	0
TOTAL REVENUES		7,891,945	7,138,468	6,309,570	7,468,111	7,527,766	0
EXPENSES							
Governing Body							
10-410-0100	Salaries - Board Compensation	26,600	26,600	26,600	26,600	26,600	
10-410-0500	Professional Services - Legal	11,999	12,000	12,000	24,000	24,000	
10-410-0600	Professional Services - Audit	13,500	13,500	13,600	13,800	13,800	
10-410-1400	Training	755	420	2,500	2,500	2,500	
10-410-4600	Contract Services - Election	0	12,099	0	19,100	19,100	
10-410-4700	Codification - Town Ordinances	13,591	3,086	5,500	5,500	5,500	
10-410-4800	Contract Services			3,500	0	0	
10-410-5300	Dues & Subscriptions	2,999	3,143	4,200	4,200	4,200	
10-410-5700	Miscellaneous Expense	1,386	2,919	1,500	1,500	1,500	
10-410-5800	Board Retreat	1,628	-23	800	800	800	
10-410-5900	Contract Services - New Manager	0	22,280	0	0	0	
10-410-9500	FICA Expense	2,035	2,035	2,200	2,200	2,200	
Total Governing Body		74,493	98,059	72,400	100,200	100,200	0
Administration							
10-420-0100	Salaries - Regular	177,945	181,309	271,475	255,000	255,000	
10-420-0500	Professional Services - Legal	17,866	16,916	19,000	19,000	18,500	
10-420-1100	Postage	0	0	0	0	0	
10-420-1400	Travel, Training, & Schools	468	920	1,200	12,000	10,800	
10-420-1600	Maintenance & Repair Equipment	952	1,080	1,050	1,050	1,050	
10-420-2100	Facility & Equipment Rental	498	532	975	1,600	1,200	
10-420-2600	Advertising	0	3,450	0	0	0	
10-420-3300	Departmental Supplies	1,187	1,472	1,350	2,500	2,100	
10-420-3600	Uniforms	0	0	0	0	0	
10-420-4400	Contract Services - Communication	0	0	0	2,000	4,000	
10-420-4500	Contract Services - Bus Service	3,399	3,380	4,000	4,000	4,000	
10-420-4700	Contract Services - Personnel Study	0	0	0	10,000	8,250	
10-420-5300	Dues & Subscriptions	10,204	11,898	13,100	14,000	14,000	
10-420-5700	Miscellaneous - Staff Expense	2,870	3,003	3,500	4,000	3,500	
10-420-7400	Capital Outlay	0	0	0	0	0	
10-420-9500	FICA Expense	12,015	12,285	20,900	20,000	20,000	
10-420-9700	Retirement Expense	26,700	27,300	40,800	38,500	38,500	
Total Administration		254,105	263,544	377,350	383,650	380,900	0
Information Technology							
10-430-0100	Salaries - Regular	52,002	54,133	56,000	56,000	56,000	
10-430-1400	Travel, Training, & School	990	1,339	1,200	1,200	1,200	
10-430-1600	Maintenance & Repair - Equipment	2,346	1,173	1,000	1,000	1,000	
10-430-2100	Aircard/Data Expense	2,051	1,824	1,860	1,860	1,860	
10-430-3300	Departmental Supplies	470	278	500	500	500	
10-430-4100	Licenses & User Fees	15,031	17,864	20,300	20,300	20,300	

10-430-4600	Contract Services - Data Process	25,710	22,168	24,600	24,600	24,600
10-430-4700	Contract Services - Maintenance	2,888	4,189	5,000	5,000	5,000
10-430-4800	Contract Services - Support	0	0	59,500	59,500	22,500
10-430-7400	Capital Outlay - Equipment	-344	11,657	15,000	0	15,000
10-430-7600	Capital Outlay - Facilities	0	0	0	0	0
10-430-9500	FICA Expense	3,549	3,693	4,350	4,350	4,350
10-430-9700	Retirement Expense	6,346	6,622	8,450	8,450	8,450
Total Information Technology		111,039	124,940	197,760	182,760	160,760
Finance						
10-440-0100	Salaries - Regular	201,803	215,242	236,025	305,000	255,500
10-440-0200	Salaries - Part-Time	5,332	1,085	0	0	0
10-440-1100	Postage	1,400	1,400	1,800	2,100	2,100
10-440-1200	Printing	0	0	0	800	800
10-440-1400	Travel, Training & Schools	1,405	1,818	2,300	2,500	2,500
10-440-1600	Maintenance & Repair Equipment	952	1,080	1,050	1,700	1,700
10-440-2100	Facility & Equipment Rental	498	532	975	1,300	1,300
10-440-3300	Departmental Supplies	3,561	4,415	4,050	3,750	3,750
10-440-3600	Uniforms	0	0	0	0	0
10-440-4900	Contract Services - OPEB	3,357	3,975	0	5,000	5,000
10-440-5300	Dues & Subscriptions	1,134	590	700	1,200	1,200
10-440-5700	Miscellaneous - Staff Expense	0	0	0	250	250
10-440-7400	Capital Outlay - Equipment	0	0	0	0	0
10-440-9500	FICA Expense	16,567	16,903	18,100	23,500	20,000
10-440-9700	Retirement Expense	18,361	20,666	35,500	46,000	39,000
Total Finance		254,370	267,705	300,500	393,100	333,100
Economic Development						
10-450-4500	Façade Grants	1,000	4,000	0	10,000	10,000
10-450-4600	Contract Services - Economic Development	0	0	0	0	30,000
10-450-4700	TJCOG Regional Brownfields Consortium	0	0	0	0	8,000
10-450-8000	Downtown Programming	38	-54	300	300	300
10-450-9000	Appearance Committee	-159	-2,794	300	300	300
Total Economic Development		879	1,152	600	10,600	48,600
Planning						
10-490-0100	Salaries - Regular	205,267	216,214	193,000	221,000	221,000
10-490-0400	Professional Services - Engineer	10,373	2,163	1,800	31,200	31,200
10-490-0500	Professional Services - Legal	17,619	17,974	20,000	20,000	20,000
10-490-1200	Printing	188	0	400	400	400
10-490-1300	Streetlight Reimbursement - Developers	0	20,610	12,750	18,000	18,000
10-490-1400	Travel, Training, & Schools	1,422	2,071	2,400	3,750	3,750
10-490-1600	Maintenance & Repair - Equipment	3,117	2,887	2,500	2,000	2,000
10-490-1700	Maintenance & Repair - Vehicles	716	687	800	800	800
10-490-2100	Facility & Equipment Rental	1,519	2,278	2,200	1,600	1,600
10-490-2600	Advertising/Public Notices	2,951	3,059	5,200	5,200	5,200
10-490-3100	Fuel Expense	1,295	1,775	1,050	1,050	1,050
10-490-3300	Departmental Supplies	2,849	1,594	2,300	2,300	2,300
10-490-3600	Uniforms	553	836	0	0	0
10-490-4500	Minimum Housing Code Enforcement	0	0	400	0	0
10-490-4600	Contract Services	1,313	700	1,350	62,000	2,000
10-490-4700	Contract Services - Cell Tower	0	6,500	0	0	0
10-490-4800	Contract Services - Comp Plan	0	0	0	0	60,000
10-490-5300	Dues & Subscriptions	1,730	1,029	1,900	1,900	1,900
10-490-7400	Capital Outlay - Equipment	0	0	0	0	0
10-490-9200	Surveying and Recording of Maps	361	99	500	500	500
10-490-9500	FICA Expense	15,605	16,473	13,500	17,000	17,000
10-490-9700	Retirement Expense	25,006	26,786	26,000	33,500	33,500
Total Planning		291,884	323,735	288,050	422,200	422,200
Public Buildings and Ground						
10-500-1000	Utilities - Telephone	52,048	45,712	63,260	52,500	52,500
10-500-1100	Utilities - Water	4,596	1,726	2,870	2,870	2,870
10-500-1300	Utilities - Electric	12,187	8,180	9,245	10,200	10,200
10-500-1400	Utilities - Fuel	1,739	1,233	2,850	2,850	2,850

10-500-1500	Maintenance & Repair - Buildings/Ground	13,473	30,982	11,800	15,000	15,000	
10-500-1600	Maintenance & Repair - Equipment	129	266	2,500	2,500	2,500	
10-500-1700	Maintenance & Repair - Vehicle	0	0	300	0	0	
10-500-1800	Maintenance & Repair - Senior Center	2,441	10,352	5,500	14,700	9,200	
10-500-1900	Maintenance & Repair - Cemetery	0	0	0	1,750	1,750	
10-500-2100	Facility & Equipment Rental	26,541	8,744	6,500	6,800	6,800	
10-500-3100	Fuel Expense	0	0	250	0	0	
10-500-3300	Departmental Supplies	8	0	300	300	300	
10-500-4600	Contract Services - Janitor	13,700	14,000	14,300	14,300	14,300	
10-500-4700	Contract Services - Landscaping	31,560	36,540	42,500	42,500	30,000	
10-500-4800	Contract Services - Pest Control	1,780	2,410	3,120	3,120	3,120	
10-500-4900	Contract Services - HVAC	4,225	4,225	5,950	5,950	5,950	
10-500-7300	Non-Capital Expense Items	0	0	0	11,000	7,000	
10-500-7400	Capital Outlay - Equipment	0	0	0	0	0	
10-500-7600	Capital Outlay - Facilities	80,691	495,883	0	185,000	185,000	
10-500-9000	Cemetery Monument Refunds	1,450	675	1,500	1,500	1,500	
Total Public Buildings and Ground		246,568	660,928	172,745	372,840	350,840	0

Police

10-510-0100	Salaries - Regular	918,341	971,466	1,161,000	1,257,500	1,212,000	
10-510-0200	Salaries - Part-Time	0	0	0	0	7,500	
10-510-0300	Salaries - Overtime	0	0	0	7,800	6,000	
10-510-1000	Utilities - Fuel	0	1,154	2,750	2,200	2,200	
10-510-1100	Utilities - Water	0	1,375	2,420	1,850	1,850	
10-510-1300	Utilities - Electricity	0	3,930	4,750	4,800	4,800	
10-510-1400	Court Parking	2	2	100	100	100	
10-510-1500	Maintenance & Repair - Building & Grounds	0	7,052	2,500	0	0	
10-510-1600	Maintenance & Repair - Equipment	18,691	15,712	14,200	23,050	23,050	
10-510-1700	Maintenance & Repair - Vehicles	28,001	14,856	17,500	22,000	19,000	
10-510-1800	Training & Education Expense	3,268	3,772	3,500	18,420	18,420	
10-510-1900	Emergency Communications	63,019	65,950	77,202	82,110	79,110	
10-510-2100	Facility & Equipment Rental	11,586	11,546	14,100	16,300	16,300	
10-510-3100	Fuel Expense	30,172	35,960	38,500	45,800	40,250	
10-510-3300	Departmental Supplies	2,321	3,437	2,500	11,750	11,750	
10-510-3600	Uniforms	2,453	8,202	4,750	10,300	10,300	
10-510-5300	Dues & Subscriptions	2,978	2,202	3,100	6,260	6,260	
10-510-7300	Non-Capital Expense Items	0	0	0	4,000	4,000	
10-510-7400	Capital Outlay - Equipment	0	358,190	115,000	171,000	171,000	
10-510-7600	Capital Outlay - Facility	0	38,523	0	0	0	
10-510-9200	Employee Wellness Program Expense	0	0	0	0	6,000	
10-510-9000	Investigations & Drug Enforcement	585	1,200	1,500	500	500	
10-510-9204	Wake ABC Grant	3,095	15,260	9,082	6,124	6,124	
10-510-9205	Grant - Governor's Crime Commission	0	0	24,206	0	0	
10-510-9300	State Law Enforcement Forfeiture	0	0	0	0	0	
10-510-9400	Federal Law Enforcement Forfeiture	0	0	0	0	0	
10-510-9500	FICA Expense	69,689	74,051	90,850	96,500	93,500	
10-510-9700	Retirement Expense	114,602	122,657	177,700	189,000	183,000	
Total Police		1,268,803	1,756,497	1,767,210	1,977,364	1,923,014	0

Fire Services

10-530-9100	Wake County Hazardous Material	0	0	3,200	0	0	
10-530-9200	Wake County Fire Inspections - Town Facilities	366	202	650	650	650	
10-530-9300	Wake County Fire Inspections - Businesses	-2,334	489	4,250	4,250	4,250	
Total Fire Services		-1,968	691	8,100	4,900	4,900	0

Public Works

10-560-0100	Salaries - Regular	296,849	349,057	533,800	583,000	583,000
10-560-0200	Salaries - Part-Time	0	0	0	0	4,000
10-560-0300	Salaries - Overtime	0	0	0	10,000	6,000
10-560-1100	Utilities - Water	0	1,398	1,510	3,800	3,000
10-560-1200	Utilities - Heating Fuel	1,800	2,929	3,850	4,500	3,900
10-560-1300	Utilities - Streetlights	123,593	124,251	145,075	145,075	141,075
10-560-1400	Travel, Training, & Schools	3,146	1,291	2,300	7,175	7,175
10-560-1500	Maintenance & Repair - Buildings & Grounds	0	9,086	3,500	9,100	9,100
10-560-1600	Maintenance & Repair - Equipment	12,766	10,976	12,450	23,000	23,000

10-560-1700	Maintenance & Repair - Vehicles	23,937	37,211	19,000	27,400	27,400	
10-560-2100	Facility & Equipment Rental	4,012	4,951	4,500	6,200	6,200	
10-560-3100	Fuel Expense	14,827	17,763	20,800	25,000	22,000	
10-560-3300	Departmental Supplies	8,827	12,243	8,350	12,150	11,150	
10-560-3400	Street Signs & Fixtures	4,225	4,879	3,600	9,200	7,200	
10-560-3600	Uniforms	3,634	10,080	10,775	14,000	13,000	
10-560-4000	Contract Services - Stormwater	0	0	9,000	20,000	18,000	
10-560-4100	Downtown Lights - Maintenance & Repair	407	356	2,000	5,500	5,500	
10-560-4200	Contract Services - Tree Removal	0	0	0	3,500	2,000	
10-560-4300	Contract Services - Grade Streets	0	0	0	0	0	
10-560-4400	Contract Services - Snow Removal	1,329	4,394	4,000	6,500	4,500	
10-560-4500	Holiday Decorations	11,751	5,879	6,300	8,300	4,500	
10-560-4600	Maintenance & Repair - Streets	4,651	2,239	2,500	4,500	4,500	
10-560-4700	Maintenance & Repair - Drainage	2,033	928	2,450	6,400	6,400	
10-560-4800	Maintenance & Repair - Sidewalk	295	184	2,500	11,500	7,500	
10-560-5300	Dues & Subscriptions	0	270	0	2,610	2,610	
10-560-5500	Minimum Housing Enforcement	0	0	0	1,000	1,000	
10-560-7300	Non-Capital Expense Items	0	0	0	17,500	10,500	
10-560-7400	Capital Outlay - Equipment	1,000	313,172	51,000	260,000	240,000	
10-560-7500	Lease Expense	0	0	0	62,500	62,500	
10-560-7600	Capital Outlay - Facilities	231,843	36,980	0	0	0	
10-560-8100	Contract Services - Residential Collection	352,745	404,440	418,800	460,000	457,000	
10-560-8200	Contract Services - Commercial Collection	7,063	6,063	9,325	9,500	9,500	
10-560-8300	Contract Services - Leaf & Limb	23,417	17,753	25,500	76,500	60,000	
10-560-9205	Stormwater Maintenance - Phase II	9,315	35,946	21,000	0	10,500	
10-560-9500	FICA Expense	22,250	26,409	41,500	45,000	45,000	
10-560-9700	Retirement Expense	36,046	40,219	81,800	88,000	88,000	
Total Public Works		1,201,761	1,481,347	1,447,185	1,968,410	1,906,710	0

Powell Bill - Local Roads Program

10-570-0100	Salaries - Regular	0	0	0	0	0	
10-570-0200	Salaries - Part-Time	4,997	3,489	0	0	0	
10-570-0400	Professional Services - Engineer	260	1,403	2,500	2,500	2,500	
10-570-4200	ADA Compliance - Street Maintenance	0	0	0	0	20,000	
10-570-4300	Contract Services - Grade Streets	1,235,283	4,500	21,500	23,000	12,900	
10-570-4400	Debt Service - Powell Bill	137,035	145,979	149,500	149,500	139,600	
10-570-9500	FICA Expense	378	0	0	0	0	
10-570-9700	Retirement Expense	0	0	0	0	0	
Total Powell Bill - Local Roads Program		1,377,953	155,371	173,500	175,000	175,000	0

Parks and Recreation

10-620-0100	Salaries - Regular	308,054	316,586	329,900	380,000	380,500
10-620-0200	Salaries - Part-Time	39,052	26,900	26,050	45,000	41,487
10-620-0400	Umpires & Officials	32,670	33,945	33,400	34,300	34,300
10-620-1000	Utilities - Telephone	297	537	1,000	1,000	700
10-620-1200	Utilities - Fuel	2,731	3,098	3,860	3,860	3,860
10-620-1300	Utilities - Electric	27,736	29,876	30,950	30,950	30,950
10-620-1400	Travel, Training, & Schools	771	1,913	1,750	2,950	2,950
10-620-1500	Maintenance & Repair - Building & Grounds	23,768	26,248	20,750	40,100	40,100
10-620-1600	Maintenance & Repair - Equipment	3,896	3,447	4,125	9,950	9,350
10-620-1700	Maintenance & Repair - Vehicles	414	1,127	2,275	2,275	2,275
10-620-1800	Utilities - Water	5,899	9,289	8,850	10,850	10,350
10-620-2100	Facility & Equipment Rental	7,171	8,089	7,480	7,480	7,480
10-620-3100	Fuel Expense	2,451	2,672	3,150	3,150	3,150
10-620-3200	Online Processing Fees	0	0	0	5,500	5,500
10-620-3300	Departmental Supplies	17,431	21,117	17,050	15,300	15,300
10-620-3600	Uniforms	24,780	25,120	25,100	28,000	26,500
10-620-4600	Contract Service - Janitorial Services	-1,775	-875	0	0	0
10-620-5300	Dues & Subscriptions	800	445	1,475	1,475	1,475
10-620-5400	Participants Insurance	258	-276	500	1,550	1,550
10-620-5600	Team Registration Fee	780	540	2,200	2,200	2,200
10-620-5700	Special Programs and Grant Expense	14,642	136,470	16,700	17,100	17,100
10-620-5800	Trackout Program	10,870	10,017	17,150	20,000	20,000
10-620-5900	Scholarship Program	0	0	0	0	1,000
10-620-7300	Non-Capital Expense Items	0	0	0	23,300	13,800

10-620-7400	Capital Outlay - Equipment	5,495	4,147	13,800	0	0
10-620-7500	Lease Expense	0	0	0	6,000	6,000
10-620-7600	Capital Outlay - Facilities	147,626	702,547	30,000	18,000	25,500
10-620-9100	Tree City Program Expense	499	217	1,000	1,000	1,000
10-620-9200	Employee Wellness Program Expense	425	0	500	500	500
10-620-9500	FICA Expense	26,480	26,249	29,000	33,000	33,000
10-620-9700	Retirement Expense	36,964	38,582	49,800	57,000	57,500
Total Parks and Recreation		740,185	1,428,027	677,815	801,790	795,377
Non-Departmental						
10-660-0600	Group Insurance - Active	273,911	289,889	300,280	375,000	423,000
10-660-0800	Unemployment Insurance	798	0	14,875	17,000	17,000
10-660-0900	Group Insurance - Retirees	71,022	56,314	72,700	82,500	82,500
10-660-5400	Insurance and Bonds	106,211	109,101	122,600	125,000	127,500
10-660-8000	Safety Program Expenses	1,854	3,425	3,400	4,165	4,165
10-660-8500	Employee Education	0	1,065	3,000	3,000	3,000
10-660-9000	Employee Assistance Program (EAP)	0	0	0	0	9,000
10-660-9100	Debt Service - General Fund	152,581	296,314	307,000	320,000	257,500
10-660-9200	Bad Debt Expense	166	0	0	0	0
Total Non-Departmental		606,543	756,108	823,855	926,665	923,665
Special Appropriations						
10-690-9200	Wendell Historical Society	0	500	500	500	500
10-690-9500	Interact	0	1,000	1,000	1,000	1,000
10-690-9800	East Wake Education Foundation	1,000	1,000	1,000	1,000	1,000
Total Special Appropriations		1,000	2,500	2,500	2,500	2,500
Total Expenses		6,427,614	7,320,604	6,309,570	7,721,979	7,527,766
Difference		1,464,331	-182,137	0	-253,868	0

Governing Body

Description of Service: The Governing Body is the elected leadership of the Town organization responsible for setting the policy and making legislative decisions.

Revenues:

No revenues are directly attributed to the Governing Body

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	\$28,800	\$28,800	0
Operating	\$43,600	\$71,400	63.8
Capital	0	0	0
Total	\$72,400	\$100,200	38.4

Summary of Department Budget:

Contract services for legal expenses were increased \$12,000 for the Town Attorney to attend two meetings per month. Election expenses of \$19,100 included to cover the municipal election.

Staffing:

The Mayor and five Commissioners are not considered employees of the Town of Wendell.

In working to achieve the vision for the Town of Wendell, the Board of Commissioners have committed to the following:

- **Strive for efficiency** in the way we handle business. We are hard-working and attend all meetings.
- Keep the **best interests of the Town** uppermost in our minds.
- Consider all aspects of a situation and make **thorough, deliberate, and well-reasoned decisions**.
- **Explore all viewpoints**. We are open to hearing from others, learning from them and compromising, when needed.
- **Stay cohesive, collaborative, collegial, and connected** to the manager and to each other.
- **Demonstrate respect for all opinions**, especially in public. And we support the decisions of the Board. Once decisions are made by the majority, we support that decision.
- Tackle **new and novel ideas** and processes.

Administration

Description of Service:

Provides managerial, record keeping, human resources, and communication services for the organization.

Revenues:

No revenues are directly attributed to Administration.

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	\$333,175	\$313,500	-5.9
Operating	\$44,175	\$67,400	52.6
Capital	0	0	0
Total	\$377,350	\$380,900	0.9

Summary of Department Budget:

Salaries reduced \$16,475 to reflect full year costs for new clerk and manager. Training increased \$9,600 for new clerk training, HR training for special assistant and credentialed manager professional development. Departmental Supplies increased \$750 for equipment for new clerk. Contract Services includes \$4,000 for a shared PEG position to provide eight (8) hours per week of communication services and \$8,250 to complete a compensation and classification study.

Staffing:

	FY 2017	FY 2018	FY 2019	FY 2020
Positions Approved (FTE's)	2	2	3	3

The Town Clerk position was added in FY 2019. No new positions proposed in FY 2020.

FY 2019 Achievements:

1. Town Manager and Clerk recruitments.
2. Adoption of first Strategic Plan and developed a GFOA based budget document.
3. Developed a visit Raleigh visitor guide feature.

FY 2020 Challenge:

The Administration faces a training challenge with all three positions either new to the community or assuming a new role. Time allocation and prioritization will be necessary to meet the challenge.

Goals, Work Units, and Performance Measures:

1. Provide quality service in the execution, index and maintenance of records; develop agendas and draft minutes; and prepare and maintain appointment records for the Town Board of Commissioners.

Work Unit:

- Meetings attended
- Minutes drafted
- Agendas developed
- Number of citizen advisory boards
- Number of members serving on all citizen advisory boards
- Number of members with terms expiring

- Number of letters to members with terms expiring

Performance Measures:

- Percentage of agendas/packets distributed Wednesday prior to the meeting:
- Percentage of minutes adopted without correction
- Average work hours per set of minutes
- Percentage of minutes completed within four days following meeting
- Percentage of Board documents indexed and distributed within two days following Board action
- Percentage of nomination lists presented to the Board four weeks prior to expiration of term
- Continue professional education and development to achieve clerk certification

2. Seek to provide transparent governance and timely correspondence to the Commission and community using appropriate and innovative communication methods and media.

Work Units:

- Number of weekly correspondences
- Number of social media posts developed and shared
- Website and social media numbers
- Topic memos and correspondence to the Commission
- Speaking engagements and civic organization participation

Performance Measures:

- Develop a communication plan to market Wendell to external interests and increase communication for internal interests.
- Develop and/or share new social media content for each department at least every other two weeks at least 95% of the time.
- Provide a weekly correspondence from management to the Commission at least 92% of the time.

3. Build an inclusive and diverse Town organization that promotes employee development, effective public service, and innovative efficiencies.

Work Units:

- Number of employees
- Leave days taken
- Turnover rate

Performance Measures:

- Maintain a turnover rate of employees leaving the organization under 12%.
- Increase certificates and courses taken by staff by 10%.
- Review and update, as appropriate, at least 33% of the Town personnel policies.
- Complete a compensation and classification study and update all job descriptions.

Information Technology

Description of Service:

Provides technical assistance and advice to departments on the application of technology and innovative practices to improve efficiencies and effectiveness.

Revenues:

No revenues are directly attributed to Information Technology.

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	\$68,800	\$68,800	0
Operating	\$113,960	\$76,960	-32.5
Capital	\$15,000	\$15,000	0
Total	\$197,760	\$160,760	-18.7

Summary of Department Budget:

The budget retains the staff position and funding for replacement of technology. Contract services for support was reduced \$37,000 to reflect current needs and will be re-evaluated in FY 2020 upon the completion of the RFP for information technology services.

Staffing:

	FY 2017	FY 2018	FY 2019	FY 2020
Positions Approved (FTE's)	1	1	1	1

No new positions proposed in FY 2020.

FY 2019 Achievements:

1. Implementation of Office 365 for email and Microsoft Office products.
2. Evaluated services and issued a RFP for technology services.

FY 2020: Challenge:

Re-establish an information technology program following the completion of the RFP process.

Goals, Work Units, and Performance Measures:

To be determined in FY 2020 after completing the RFP for information technology services.

Finance

Description of Service:

The Finance Department is responsible for administering the Town's financial policies and procedures which include: accounts payable, accounts receivable, annual audit process, annual budget preparation, cash and investment management, financial reporting, and payroll. The department establishes and maintains an accounting and reporting system in accordance with state and federal laws and Generally Accepted Accounting Principles (GAAP).

Revenues:

No revenues are directly attributed to Finance.

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	\$289,625	\$314,500	8.6
Operating	\$10,875	\$18,600	71.0
Capital	0	0	0
Total	\$300,500	\$333,100	10.8

Summary of Department Budget:

Equipment maintenance and repair increased \$650 for copier expenses. Contract Services of \$5,000 for estimated post-employment benefit (OPEB) expenses. Dues and subscriptions increased \$500 for GFOA dues and award applications.

Staffing:

	FY 2017	FY 2018	FY 2019	FY 2020
Positions Approved (FTE's)	4	4	4	4

No new positions proposed in FY 2020.

FY 2019 Achievements:

1. GFOA Award received for the FY 2017 Comprehensive Annual Financial Report (CAFR).
2. Unqualified audit opinion for the FY 2018 audit.
3. Prepared and submitted the FY 2018 CAFR for review by the GFOA.

FY 2020: Challenge:

Ensure compliance for purchasing and contracts as organization grows and seek opportunities to achieve efficiencies through coordinated purchasing opportunities.

Goals, Work Units, and Performance Measures:

Ensure that organization procurement and purchasing practices are legally compliant. To accomplish this challenge, the department would need the resource of an additional staff member dedicated to assist all departments. A centralized purchasing system could result in cost saving measures and provide an efficient procurement process.

Department Goals, Work Units, and Performance Measures:

1. Provide transparent and accurate fiscal management, inclusive communication and financial information to comply with governmental and regulatory requirements.

Work Unit:

- Complete Audit, Comprehensive Annual Financial Report (CAFR), and Distinguished Budget Presentation Award applications.

Performance Measure:

- Submit to the required agencies by established deadlines and receive certificates from the Governmental Finance Officers Association (GFOA) of the achievement for excellence in financial reporting.

2. Maintain customer service for accounts payable by providing timely invoice processing to vendors for goods and services.

Work Unit:

- Process 1,260 checks on an annual basis

Performance Measure:

- Complete weekly accounts payable and submit payments to vendors by established due dates at least 90% of the time.

3. Maintain customer service to the organization by preparing accurate payroll to all employees including elected officials.

Work Unit:

- Prepare 26 payrolls on an annual basis.

Performance Measure:

- Complete bi-weekly payroll in a timely manner to meet direct deposit deadlines with at least 95% accuracy.

4. Ensure that organization procurement and contracting practices are legally compliant and transparent.

Work Unit:

- Evaluation of all acquisitions of goods and services over \$30,000 to include the number of acquisitions evaluated and process used.

Performance Measure:

- Achieve 100% legal compliance for purchasing and contracts.

Economic Development

Description of Service:

The Economic Development program provides services, administers grants, and engages the community to induce investment by new and existing businesses, encourages diversification of land use, and promotes a vibrant downtown economy.

Revenues:

No revenues are directly attributed to Economic Development.

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	0	0	0
Operating	\$600	\$48,600	8,000
Capital	0	0	0
Total	\$600	\$48,600	8,000

Summary of Department Budget:

Provides \$10,000 for the Downtown façade grant program, \$30,000 for contract services for economic development work and program development, and \$8,000 to participate in the TJCOG regional brownfield program. Maintains level funding for Downtown programming and the Appearance Commission.

Staffing:

No staff is accounted for in the Economic Development Department.

FY 2019 Achievements:

1. Completed an Economic Development Assessment with the NC Department of Commerce.
2. Received a \$40,000 grant from the NC Department of Commerce for a significant Downtown façade improvement and the establishment of a special event non-profit for Downtown.
3. Developed a scope of work for economic development contract services to provide a Wendell presence with economic partners and develop a sustainable program structure.

FY 2020: Challenge:

Establish an economic development program through contracted services.

Goals, Work Units, and Performance Measures:

To be developed in FY 2020 in coordination with contracted services.

Planning

Description of Service:

The Planning Department works with the community to create a vibrant town that meets the quality of life needs of all residents, revitalizes the downtown and local economy, supports preservation of history, and protects natural resources and community assets.

Revenues:

	FY 2019	FY 2020	% Change
Dev./ Plan. Fees	\$114,650	\$120,450	5.1
Engineer Review Fees	0	\$26,000	---
Total	\$114,650	\$146,450	27.7

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	\$232,500	\$271,500	16.8
Operating	\$44,175	\$67,400	63.3
Capital	0	\$60,000	---
Total	\$377,350	\$380,900	46.6

Summary of Department Budget:

Development and Planning fees continue are projected to increase with continued growth. Salary increases reflect the new Planner position for a full year. Engineer review fees are accounted for in both revenue and expense lines in FY 2020. A \$29,400 increase in professional services reflects the separation of actual expense in Planning with a new revenue line charged during development. Reimbursement for streetlight expenses increases \$5,250 due to growth. Training is increased by \$1,350 for new staff and AICP certifications. The Comprehensive Land Use Plan update starts with one-half the cost, \$60,000, budgeted in FY 2020.

Staffing:

	FY 2017	FY 2018	FY 2019	FY 2020
Positions Approved (FTE's)	4	4	4	4

The Code Enforcement position was transferred to Public Works and the Planner position was added in FY 2019. No new positions requested in FY 2020.

FY 2019 Achievements:

1. Installation of 16 wayfinding signs.
2. Issued 200 single-family home permits through January 2019 for FY 2019.
3. Commercial activity completed includes Wendell Blvd Emergency Management Services (EMS), AAA Louvers, Wendell ABC Store, and Cruizers Gas Station.

FY 2020: Challenge:

With 75% of staff being new to the organization and Wake County initiating a new digital permitting system in FY 2019, training of staff in a busy development environment is necessary.

Goals, Work Units, and Performance Measures:

1. Proactively support regulatory changes to advance downtown vibrancy, sustainable economic growth, and community character.
 - a. Facilitate an update to the Town's Comprehensive Plan to reflect changing demographics, growth patterns, and desired outcomes.
 - b. Perform annual updates to the Wendell Unified Development Ordinance.
 - c. Revise the zoning uses for the Downtown area in the UDO to promote downtown vibrancy and better reflect community and business preference and market needs.

Work Units:

- Adoption of an updated Comprehensive Plan
- Adoption of town-initiated text amendments
- Adoption of identified UDO amendments for the Downtown area

Performance Measures:

- Establish core elements to be included, identify and select preferred consultant to assist with update, engage community in series of visioning workshops, and adopt updated plan within 2 years.
- Establish an annual schedule for town-initiated text amendments and adopt a minimum of 5 identified amendments during the period identified in the schedule (unless less than 5 total amendments have been identified during the year).
- By the end of Q1 of FY20, adopt UDO amendments related to uses in the Downtown, identified through the NC Department of Commerce engagement meetings.

2. Support and enhance economic growth and development in a manner which maintains a positive quality of life and reflects Wendell's unique community character.
 - a. Facilitate permitting activity within the Town in a clear, consistent, and timely manner.
 - b. Engage with local and regional partners to maximize opportunities for collaboration and advance mutually beneficial outcomes.
 - c. Identify opportunities for infill housing and commercial development in Downtown and establish a program to promote the potential development or redevelopment projects.
 - d. Update the economic development strategic plan to reflect the NC Department of Commerce vision, stakeholder, and engagement sessions to include an action plan for implementation.
 - e. Pursue capital projects which improve access to recreational amenities, institutions, retail, jobs, and basic services.

Work Units:

- New home permit issuance
- Trade Permit issuance
- Attendance at regional meetings and workshops
- Support 2020 Census efforts
- Attendance at quarterly update meetings with Wendell Falls
- Creation of a vacant property inventory
- Adoption of an updated economic development strategic plan
- Development of Wendell Blvd Sidewalk Design Study

Performance Measures:

- Schedule building plan review and complete zoning review within 7 calendar days of submittal.
- Residential trade permits ready to issue within 48 hours of submittal. Commercial trade permits ready to issue within 7 calendar days of submittal.

- Have a planning department representative in attendance for at least 75 percent of all Technical Coordinating Committee, Wake County Economic Development Partner, and Community Development Block Grant meetings.
 - Have a planning department representative present at all Complete Count Committee meetings and provide financial support for marketing efforts.
 - Have a planning department representative present at all quarterly update meetings hosted by Newland Communities.
 - By the end of Q1 of FY20, establish a downtown vacant property index for inclusion on the Town website.
 - By the end of Q2 of FY20, adopt an updated economic development strategic plan.
 - Submit a request for proposals for an environmental and design study to be conducted for a proposed sidewalk project along Wendell Blvd between Wendell Elementary and the Food Lion Shopping Center. Select a consultant and complete the design study in FY19/20, in preparation of a LAPP project submittal (for ROW/Construction) to be submitted in FY20/21.
3. Pursue organizational improvements which enhance transparency, efficiency, and customer service.
- a. Evaluate Neighborhood meeting requirements employed by neighboring jurisdictions to promote transparency and public participation in development decisions.
 - b. Evaluate departmental policies and procedures to establish more efficient service deliveries.
 - c. Facilitate a better understanding of Wendell's key zoning and development requirements through the creation of a condensed Wendell Development Frequency Asked Questions (FAQ) document.
 - d. Pursue and support opportunities for professional development and training.

Work Units:

- Development of a comparison table identify the range of Neighborhood Meeting requirements employed by comparable communities.
- Development of a priority list of internal procedural changes to clarify and streamline zoning, development, and annexation application submittals.
- Completion of a Wendell Development FAQ document.
- Completion of training and certification courses.

Performance Measures:

- By the end of Q3 of FY20, bring a summarized report of Neighborhood Meeting requirement options for consideration and potential incorporation into Wendell's procedures.
- By the end of Q3 of FY20, develop a list of procedural improvements for consideration and potential incorporation into Wendell's procedures.
- By the end of Q2 of FY20, finalize a Wendell Development FAQ document for distribution.
- Planning Director to attend the NC APA conference in Wilmington October 8-11th.
- Planner I to complete the 'Foundations in Planning and Development Regulations' course offered by the School of Government in September of 2019.
- Planner I to complete the 'Zoning Practice' course offered by the School of Government in October of 2019.
- Attendance by 1 staff member at the 2020 Main Street Conference (Spring 2020).

Public Buildings and Grounds

Description of Service:

Public Buildings and Grounds is a budget cost-center used to track expenses for buildings and grounds used or owned by the Town of Wendell.

Revenues:

No revenues are directly attributed to Public Buildings and Grounds.

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	0	0	0
Operating	\$172,745	\$165,840	-4.0
Capital	0	\$185,000	---
Total	\$172,745	\$350,840	103.1

Summary of Department Budget:

Expense reductions include telephone, \$10,760, to reflect actual and landscaping contract services, \$12,500, to reduce areas contracted. Operations highlights include replacement of remaining HVAC system at the Senior Center (\$6,000), cemetery driveway maintenance (\$1,750), Town Square stage step repair (\$4,000), and retrofit covers for Downtown trashcans (\$3,000). The \$185,000 capital project is the design and environmental work for the Wendell Boulevard Sidewalk project.

Staffing:

No staff is accounted for in the Public Buildings and Grounds Department.

FY 2019 Achievements:

1. Senior Center repairs and maintenance to replace one portion of HVAC and side door.
2. Transfer limb debris storage from old dump site to current public works yard and arrange for disposal by the solid waste service provider.
3. Evaluate Town Hall in preparation for determining options for constructing a new structure or renovating and adding to the existing site.

FY 2020: Challenge:

Maintain aging facilities within constrained budgets until replacement facilities or renovation projects are planned and constructed.

Goals, Work Units, and Performance Measures:

To be developed in FY 2020 in coordination with the consolidation of Building and Grounds cost centers.

Police

Description of Service:

The Police Department delivers the highest quality law enforcement services by establishing and maintaining partnerships to ensure a high quality of life for all persons that are a part of the community.

Revenues:

	FY 2019	FY 2020	% Change
Golf Cart Fees	0	\$3,500	---
Court Revenue	0	\$750	---
Wake ABC Grant	\$9,082	\$6,124	-32.6
Total	\$9,082	\$10,374	14.2

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	\$1,429,550	\$1,502,000	5.1
Operating	\$222,660	\$250,014	12.3
Capital	\$115,000	\$171,000	48.7
Total	\$1,767,210	\$1,923,014	8.8

Summary of Department Budget:

The salary line includes two new positions starting in January 2020 to address manpower needs and to prepare for CALEA accreditation. An overtime line (\$6,000) provides officers an alternative to compensatory leave and a part-time line (\$7,500) covers an existing auxiliary officer. Equipment maintenance increased \$8,850 to cover new position equipment. Training and education increased \$14,920 to cover CALEA accreditation expenses and increased training needs. Department supplies increased by \$9,250 for training ammunition for the new handguns. Uniforms is increased \$5,550 to cover new employee expenses and to begin replacing worn-out. Dues and subscriptions increased \$3,160 to cover accreditation membership. A non-capital line (\$4,000) is added for radios for new positions. The capital outlay of \$171,000 replaces and equips two existing patrol vehicles and provides one new vehicle. A wellness program is established (\$6,000) to reimburse officers gym membership costs.

Staffing:

	FY 2017	FY 2018	FY 2019	FY 2020
Positions Approved (FTE's)	18	19	20	22

The Police Officer position was added in FY 2019. Two new positions requested in FY 2020 to start on or after January 1, 2020 are a Police Officer position and a Records and Training Administrator position. The Police Officer provides staffing to have four officers per squad. The Records and Training Administrator will handle CALEA accreditation, training records, and grant writing as responsibilities.

FY 2019 Achievements:

1. Five patrol vehicles equipped and deployed.
2. Implemented a Governor's Crime Commission grant to acquire new handguns and equipment.
3. Filled two vacant positions.

FY 2020: Challenge:

Manpower remains the greatest challenge including filling authorized positions to establish a staffing level of four officers per shift.

Goals, Work Units, and Performance Measures:

1. Provide high quality law enforcement services in order to promote a safe and secure community.
 - a. Continue to provide core police services of community patrol and response to emergency and non-emergency calls at current levels.
 - b. Review and enhance departmental policies, practices and training to achieve CALEA accreditation.
 - c. Expand use of electronic communications resources to provide public safety information and increase community partnerships.
 - d. Enhance Community partnerships through consistent use of community engaged policing methods.

Work Units:

- Call Volume (community patrol)
- Accreditation implementation plan (accreditation)
- Postings on approved social media/web sites (communications)
- Community engagement report

Performance Measures:

- Maintain an 90th percentile response time from time dispatched until on scene of 7 minutes.
- Establish a core team tasked to investigate CALEA accreditation and to guide the organization to meet that standard within 3 years of signing CALEA contract.
- Post at least one public awareness informational notice per week onto the approved social media/web sites.
- Participate in a minimum of 12 community events per year which are focused on education, understanding and partnering across the diverse greater Wendell Community.

2. Ensure staff development is focused on policy development, recruitment, retention and personal development so that staff is invested in the enhancement of livable family friendly neighborhoods.
 - a. Training Committee will complete a review of Career Development Program with a focus on community engagement, officer safety, and traditional law enforcement skill development.
 - b. Implement a Community Engagement Policing training program.
 - c. Enhance training of Managers and Supervisors.
 - d. Utilize best practices to actively recruit the most suitable applicants from the available work force that represents the community served.

Work Units:

- Published draft revised Career Development Program.
- Published Training Guideline including accomplishments.
- Training Records.
- Published Recruitment Plan.

Performance Measures:

- By March 2020, Committee will submit a completed review and include any proposed changes for consideration.
- By January 1, 2020, publish a Guiding Document that includes needs assessments, recommended training by position and methods to adjust as needed with a plan to implement by July, 2020.
- Each manager/supervisor should attend a minimum of one criminal justice leadership/supervisory based training program per year.

- A recruitment team will be established and tasked with development and implementation of a published recruitment plan, benchmarks and a reporting process to determine effectiveness by November 2019.
3. Respond to community members in need in a manner that promotes compassion, support and understanding in order to promote safe neighborhoods and businesses.
- a. Expand the number of officers trained to provide advanced crisis intervention support to community members.
 - b. Promote community-based resources available to persons in crisis or in need of assistance.
 - c. Expand enforcement of drug violations.

Work Units:

- Training Records
- Resource Directory for Crisis Intervention
- Cases opened

Performance Measures:

- Assign at least two officers per year to attend formal Crisis Intervention Training.
- By December 2019, identify and provide public access to a Wake County relevant published resource referral guide to ensure persons in crisis can be directed to appropriate agencies that can best address their needs.
- Increase agency-initiated drug investigations by 25%.

Fire Services

Description of Service:

The Fire Services program tracks expenses for fire inspections of Town properties and businesses. Fire protection is provided by the Wendell Fire Department, not a Town department, and funded through the Wake County Fire Tax. Ambulance service is provided by East Wake EMS through a contract with Wake County and is also not a Town Department. Hazardous Material response service is provided by the City of Raleigh by contract with the Town and funded by the Wake County Fire Tax.

Revenues:

No revenues are directly attributed to Fire Services.

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	0	0	0
Operating	\$8,100	\$4,900	-39.5
Capital	0	0	0
Total	\$8,100	\$4,900	-39.5

Summary of Department Budget:

A reduction of \$3,200 for Wake County Hazardous Material recognizes that the cost is provided for by the Wake County Fire Tax and not the Town.

Staffing:

No staff is accounted for in the Fire Services Budget.

Public Works

Description of Service:

Provides maintenance and replacement services for public infrastructure, buildings, and grounds in the areas of stormwater, code enforcement, streets, sidewalks, facilities, solid waste, landscaping, and maintenance.

Revenues:

	FY 2019	FY 2020	% Change
Sidewalk & Driveway	0	\$13,000	---
Code Enforcement	\$2,100	\$2,100	0
Solid Waste Fees	\$658,550	\$670,000	1.7
NCDOT Mowing	0	\$3,487	---
Total	\$660,650	\$688,587	4.2

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	\$657,100	\$726,000	10.5
Operating	\$739,085	\$878,210	18.8
Capital	\$51,000	\$302,500	493.1
Total	\$1,447,185	\$1,906,710	31.8

Summary of Department Budget:

New revenue lines added to reflect fees for sidewalk and driveway inspections and reimbursement from NCDOT for Town mowing of State roads. Salary lines increase to add one Public Works Specialist and an overtime salary line is added (\$6,000) to offer an alternative to compensatory leave. Training is increased (\$4,875) for supervisory and staff training requirements and dues and subscriptions (\$2,610) added for APWA membership. Maintenance and repair increases include facilities (\$5,600) for door replacements, equipment (\$10,550) for required maintenance, and vehicles (\$8,400) for streetsweeper maintenance, transmission service, and tires. Investments in public infrastructure repair include increases for street signs (\$3,600), streets (\$2,000), drainage (\$3,950), and sidewalks (\$5,000). Non-capital purchases include a salt spreader (\$7,000) and a chemical sprayer (\$3,500). Capital expenses include a primary leaf truck (\$195,000), a replacement truck (\$28,000), and two replacement mowers (\$17,000). Contract services for leaf and limb disposal increased \$34,500 for offsite disposal.

Staffing:

	FY 2017	FY 2018	FY 2019	FY 2020
Positions Approved (FTE's)	7	10	13	14

Three positions were added in FY 2019 and the department underwent a restructuring of existing positions that resulted in an administrative assistant, a superintendent, and an additional crew leader position. A Public Works Specialist position is proposed in FY 2020.

FY 2019 Achievements:

1. Overcoming the loss of the leaf truck and acquiring the alternative collection system.
2. Department restructure that incorporates Code Enforcement and inspections with additional staff assigned to maintain compliance from permit issuance to certificate of occupancy.

3. Staff obtained commercial drivers licenses (8 of 13 employees), as required by job descriptions.

FY 2020: Challenge:

Work to improve processes, maintenance practices, and partner coordination to improve public properties and infrastructure.

Goals, Work Units, and Performance Measures:

1. Provide municipal services and enforcement for the efficient and effective removal of leaf, limb, and debris; street clearing; timely code enforcement; solid waste contract management; and utility contract management.

Work Units:

- Total yards of debris collected from leaf, limb, & street clearing.
- Total lane miles (all of town) from leaf, limb, & street clearing.
- Number of code violations.
- Number of inspections for driveways, foundations, and final certificates of occupancy.

Performance Measures:

- Provide weekly leaf and limb removal to the town 90% of the time, with the goal of completing the weekly route 50% of the time.
- Provide a minimum of monthly street clearing service to all town-maintained roads at least 92% of the time.
- Provide street clearing in the downtown service area twice per month 100% of the time.
- Respond to all code enforcement service requests within 2 business days (or as scheduled) at least 90% of the time.

2. Ensure the maintenance, replacement, and extension of adequate sidewalk, street, stormwater, and street light infrastructure to maintain a high quality of life and clean environment for a growing community.

Work Units:

- Total miles of town sidewalk maintained.
- Total miles of town streets maintained.
- Total linear feet of known stormwater pipes (Public and Private).
- Total number of public streetlights.

Performance Measures:

- Inspect all town sidewalks for maintenance needs two times per year.
- Establish a sidewalk maintenance and replacement plan by the end of Q2 FY 2020.
- Complete a monthly street condition inspection and fill potholes within one week 92% of the time.
- Acquire engineering services to prepare a street resurfacing priority list by the end of Q1 FY 2020.
- Clean all stormwater catch basins annually 100% of the time.
- Complete monthly street light inspections and correct normal deficiencies within 3 weeks 92% of the time.

3. Maintain safe and efficient buildings, grounds, and streetscapes.

Work Units:

- Number and square feet of facilities maintained.
- Work hours needed to complete the landscaping route.
- Total facility work orders.
- Total grounds work orders.

Performance Measures:

- Complete monthly needs and safety inspections for all buildings and grounds 100% of the time.
- Complete all town construction projects on time and within budget 100% of the time.
- Conduct mowing, landscaping, and weekly maintenance during season 85% of the time.
- Conduct maintenance inspection for Town Square and streetscape two times per year and make needed repairs, as budget allows, within 30 days 92% of the time.

4. Develop operational practices to ensure proper maintenance of the town vehicle fleet and equipment, safety practices, and professional development.

Work Units

- Number of vehicles and equipment maintained.
- Total cost of vehicle maintenance.
- Number of wrecks and incidents.
- Total training certificates received or renewed by the department last year.

Performance Measures:

- Complete all vehicle and equipment service inspections weekly 98% of the time.
- Conduct a maintenance inspection within one week following use for heavy equipment 100% of the time.
- Maintain safety certifications for all employees, as applicable, 100% of the time.
- Provide training opportunities for all employees related to safety, equipment uses, and customer service at least 92% of the time.

Powell Bill – Local Roads Program

Description of Service:

The Local Roads program tracks the expenditure of Powell Bill Funds received from the State that are restricted to eligible road maintenance expenses.

Revenues:

	FY 2019	FY 2020	% Change
Powell Bill Funds	\$173,500	\$175,000	0.9
Total	\$173,500	\$175,000	0.9

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	0	0	0
Operating	\$173,500	\$175,000	0.9
Capital	0	0	0
Total	\$173,500	\$175,000	0.9

Summary of Department Budget:

Payment of debt for past road improvements account is \$139,600. An ADA Compliance program is established (\$20,000) to retrofit local road sidewalk crossings.

Staffing:

No staff is accounted for in the Powell Bill – Local Roads Program.

FY 2019 Achievements:

1. Payment of past project debt service (\$149,500 budgeted in FY 2019).
2. Established a local street resurfacing program in the five-year capital improvement program.
3. Initiated an updated of the local street condition and maintenance plan.

FY 2020: Challenge:

Initiating an ADA compliance program to ensure accessibility at all local street intersections and sidewalks.

Goals, Work Units, and Performance Measures:

Not applicable in FY 2020.

Parks and Recreation

Description of Service:

Offers high-quality recreational, cultural, and leisure opportunities for residents and visitors through facilities, programming, parks, and special events.

Revenues:

	FY 2019	FY 2020	% Change
Rec. Revenue	\$78,750	\$89,565	13.7
Rec. Sponsorship	\$4,900	\$5,600	14.3
Rec. Rental Proceeds	\$36,800	\$37,600	2.2
Rec. – Trackout	\$51,250	\$51,250	0
Park Concessions	0	\$1,200	---
Totals	\$171,700	\$185,215	7.9

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	\$434,750	\$512,487	17.9
Operating	\$229,265	\$251,390	9.7
Capital	\$13,800	\$31,500	128.3
Total	\$677,815	\$795,377	17.3

Summary of Department Budget:

Recreation revenues and sponsorships are anticipated to grow with program and community growth. Personnel lines increased for a new parks maintenance position and increased part-time funding (\$15,437) due to increased use and a market rate pay adjustment. Training is increased \$1,200 for two staff to become certified parks and recreation professionals (CPRP). Increases in maintenance budgets provide for field aeration (\$19,350), tractor maintenance (\$5,225), and water (\$1,500) due to use and the new field. Online processing fees (\$5,500) are accounted for outside of the revenue. Trackout program costs increase \$2,850. A new recreation scholarship program (\$1,000) is funded. Non-capital expense items include tables and chair replacement, a rototiller, a podium PA system, an ice machine, trashcans, and picnic tables. A lease payment (\$6,000) for the tractor acquired in FY 2019 is added. The capital project (\$25,500) provides improvements to Wendell Park and Community Center to replace gym stairs, WiFi, access to lower parking area, and gutter guards.

Staffing:

	FY 2017	FY 2018	FY 2019	FY 2020
Positions Approved (FTE's)	6	6	6	7

A Parks Maintenance position is proposed in FY 2020.

FY 2019 Achievements:

1. New program expansion to activate the improved and expanded facilities included the addition of the community garden, dedicated gym access for special populations, kickball, wiffleball, and tennis.
2. Community participation and awareness of special events continued.
3. Completion of the new park maintenance building behind the community center.

FY 2020: Challenge:

The expansion of the park, increased program demand, and popularity of special events necessitated increased time of existing staff away from maintenance. In order to protect the investment made and to continue the current level of service provided, a new parks maintenance position is critical to coordinate building, field, and park maintenance schedules and tasks are completed in a timely manner.

Goals, Work Units, and Performance Measures:

1. Evaluate existing recreation programs to increase participation levels to ensure a diverse offering that is relevant to the whole community.

Work Unit:

- Total program registrations
- Number of programs

Performance Measures:

- Increase participation in programs by 2%
- Demonstrate that program offerings are inclusive and diverse

2. Improve maintenance and operational efficiency throughout the park system to ensure quality facilities and varied park offerings.

Work Units:

- Daily, weekly, monthly, and annual inspection numbers for parks and recreation facilities and equipment.

Performance Measures:

- Complete checklists for facilities and equipment with appropriate actions taken at least 95% of the time.

3. Evaluate special events to increase participation and enhance the value to the community.

Work Units:

- Number of events managed
- Number of community/social media posts
- Rough attendance estimates for events

Performance Measures:

- Complete an evaluation of all special events to establish baseline Town resource requirements.
- Increase rough attendance estimates for special events by 3%.

4. Provide a high quality and diverse park system for all age, ability, and interest groups.

Work Units:

- Completed Comprehensive Parks and Recreation Master Plan
- Average budget investment per acre of park (National: \$6,589, Wendell FY 2019: \$5,539)
- Parks per capita (National: 1 park per 2,114 residents, Wendell: 1 park per 7,200 residents)
- Open space per capita (National: 10 acres per 1,000 residents, Wendell: 17.4 acres per 1,000 residents)
- Public playgrounds per capita (National: 1 playground per 3,600 residents, Wendell: 1 playground per 7,200 residents)

Performance Measures:

- Complete the Comprehensive Parks and Recreation Master Plan and identify initial implementation steps for inclusion in future budgets.

Non-Departmental

Description of Service:

The Non-Departmental section is comprised of organization-wide expenses such as debt service, life insurance, health insurance, retiree expenses, and other benefit related costs.

Revenues:

No revenues are directly attributed to Non-Departmental programs.

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	0	0	0
Operating	\$823,855	\$923,665	12.1
Capital	0	0	0
Total	\$823,855	\$923,665	12.1

Summary of Department Budget:

Health insurance estimates are increased \$122,720 to account for full-year employee coverage, new positions, and 22% premium increases due to claim history in FY 2019. Debt service payments are decreased by \$49,500 consistent with payment schedules after retiring a loan early in FY 2019. The employee education assistance program is continued (\$3,000) and a new employee assistance program (EAP) is established (\$9,000) to assist with employee counseling and crisis needs.

Staffing:

No staff is accounted in Non-Departmental programs.

FY 2019 Achievements:

1. Continued servicing of existing debt.
2. Maintaining insurance coverage for retirees.
3. No increase in life and property insurance rates.

FY 2020: Challenge:

Maintain competitive benefits to attract quality professionals to the organization in a manner that is cost-sustainable to the community.

Goals, Work Units, and Performance Measures:

Not applicable in FY 2020.

Special Appropriations

Description of Service:

Special appropriations provide annual funding support to agencies outside of the Town organization that support community and Town goals as determined by the Board of Commissioners.

Revenues:

No revenues are directly attributed to Special Appropriations.

Expenditures:

	FY 2019	FY 2020	% Change
Personnel	0	0	0
Operating	\$2,500	\$2,500	0
Capital	0	0	0
Total	\$2,500	\$2,500	0

Summary of Department Budget:

Outside agencies receiving funding are as follows:

- Wendell Historical Society \$500
- InterAct \$1,000
- East Wake Educational Foundation \$1,000

Staffing:

No staff is accounted for in Special Appropriations.

FY 2019 Achievements:

1. Maintained funding to outside agencies as determined by the Board of Commissioners.

FY 2020: Challenge:

Provide an equitable program to receive and consider outside agency funding requests that encourages fiscal sustainability and return on the community investment.

Goals, Work Units, and Performance Measures:

Not applicable in FY 2020.

General Fund Balance

The General Fund Balance is simply the accumulation of revenues minus expenditures over time. The purpose of this savings provides the Town with cash flow, emergency funds for unexpected expenses, and to facilitate saving money over time for anticipated capital projects. The Local Government Commission (LGC) set 8% as a minimum fund balance target for NC local governments. The Town of Wendell policy is to maintain a minimum unassigned fund balance of 40% of the operating (non-capital) budget. The current and fund balance history are provided in the following table.

	Fiscal Year							
	2011	2012	2013	2014	2015	2016	2017*	2018
Restricted	\$ 441,449	\$ 555,157	\$ 310,202	\$ 416,973	\$ 229,137	\$ 374,024	\$ 1,364,711	\$ 362,791
Committed	\$ 1,239,884	\$ 1,249,178	\$ 386,131	\$ 263,203	\$ -	\$ -	\$ -	\$ -
Assigned	\$ -	\$ -	\$ 222,869	\$ 125,000	\$ 891,450	\$ 18,000	\$ 176,970	\$ 245,800
Unassigned	\$ 2,755,351	\$ 2,833,622	\$ 3,400,310	\$ 3,952,032	\$ 3,862,538	\$ 5,052,270	\$ 5,328,810	\$ 6,030,012
Total	\$ 4,436,684	\$ 4,637,957	\$ 4,319,512	\$ 4,757,208	\$ 4,983,125	\$ 5,444,294	\$ 6,870,491	\$ 6,638,603
Change in Total Fund Balance	\$ 391,553	\$ 201,273	\$ (318,445)	\$ 437,696	\$ 225,917	\$ 461,169	\$ 1,426,197	\$ (231,888)
Change in Assigned/Unassigned Fund Balance	\$ 78,271	\$ 789,557	\$ 453,853	\$ 676,956	\$ 316,282	\$ 435,510	\$ 770,032	
Assigned Fund Balance is designated fund balance appropriation for succeeding budget year.								
* Reporting loan proceeds to spend in FY 2018								

Compliance with the Fund Balance policy for the FY 2020 budget is calculated as follows:

The FY 2020 Operating Budget is the calculated by subtracting capital expenses from the total expenses, or $\$7,527,766 - \$716,500 = \$6,811,266$.

2018 Unassigned Fund Balance / FY 2020 Operating Budget * 100% = FY 2020 Budgetary Fund Balance, or, $\$6,030,012 / \$6,811,266 * 100\% = 88.5\%$.

As such, the FY 2020 budgetary fund of 88.5% exceeds LGC and Town requirements and is compliant.

Water and Sewer Funds

Water and Sewer service is provided to the Town of Wendell by the City of Raleigh following a Merger Agreement in 2006. The Water and Sewer Funds are maintained as a pass-through fund to receive revenues from the City of Raleigh to pay past debt issued for capital improvements. The Funds may be used for Town participation in the extension of water or sewer lines as provided for in the Merger Agreement but have not been used in this manner to date. The Local Government Commission provides the debt payment amount annually for the Town to pay. The City of Raleigh reimburses the Town for the debt payment. The amount budgeted exceeds the amount anticipated by the auditor for the outstanding debt for both water and sewer loans. The loan for past water improvements is scheduled to retire following FY 2022. The sewer loan is scheduled to retire and the Town merge with the City of Raleigh system in FY 2023.

Account	Account Description	FY 18/19 Budget	FY 19/20 Proposed	FY 19/20 Adopted	FY 20/21 Estimate	FY 21/22 Estimate	FY 22/23 Estimate
REVENUES							
30-399-04	City of Raleigh - Debt Payment - Water	132,149	50,000		50,000	50,000	0
32-399-04	City of Raleigh - Debt Payment - Sewer	803,807	450,000		430,000	420,000	410,000
	TOTAL REVENUES	935,956	500,000	0	480,000	470,000	410,000
EXPENSES							
30-660-91	Non-Departmental - Debt Service - Water Fund	132,149	50,000		40,000	50,000	0
32-660-91	Non-Departmental - Debt Service - Sewer Fund	803,807	450,000		430,000	420,000	410,000
	TOTAL EXPENSES	935,956	500,000	0	470,000	470,000	410,000

Long-Range Financial Planning

The Town of Wendell uses long-range financial planning to establish a plan for capital projects that require more money to implement and capitalizing funds for capital projects through the issuance of debt and lease obligations. The capital expenditures detailed in this section only apply to General Fund Expenditures. Capital expenditures and debt related to utilities are detailed in the Water and Sewer Fund section. It is important to note that planning for capital expenses and the issuance of debt is just that... planning. The long-range financial planning does not obligate the Town to expend the funds as shown. The plans are evaluated and adjusted annually based on the capital needs, obligations, economic conditions, and fiscal policies of the time. Circumstances may arise that necessitates the addition or removal of capital improvements during the fiscal year.

Capital items are defined as expenses exceeding \$10,000 that include facilities, land, infrastructure, vehicles, equipment, technology, or plans. Capital expenses can also include projects that extend the life of existing capital items and projects. Long-term borrowing is confined to fund significant capital improvements that have an extended life when it is not practical to fund the project from existing revenues or fund balance reserves.

The Capital Improvement Program (CIP) identifies a five-year plan identifying the capital projects needed by the Town. Year one of the CIP is the capital budget that is included in the budget ordinance for funding approval in FY 2020. Years two through five are for planning purposes only and subject to review. Typically, capital items progress towards funding over time, but can be delayed during the annual evaluation. The Capital Budget for FY 2020 is \$716,500. Debt service and lease payments total for FY 2020 is \$527,880. The total capital improvement and debt budget for FY 2020 is \$1,244,380. The total cost for capital improvements for the five-year CIP for FY 2020 through FY 2024 is \$12,213,743.

Like the General Fund budget, the CIP is divided into revenues and expenses. The FY 2020 budget identifies the use Sales Tax revenues to cover the cost of existing principle and interest debt payments due during the coming fiscal year. During years two through five, the goal is to increase the use of Sales Tax revenues as a regular funding source for capital improvements. In each successive year, increments of \$200,000 from Sales Tax will be used to fund the CIP. The use of the Sales Tax will increase revenues available for capital purchases needed during this period of community and organization growth and reduce the use of fund balance and loans to fund minor capital needs, such as equipment and vehicles. The additional revenue will also provide funding for future borrowing needs for facility and land needs.

Capital expenses are divided into four broad categories of expenses as follows: (1) transportation and infrastructure; (2) vehicles, equipment, and technology; (3) buildings, grounds, and land; and (4) economic and community development. The CIP Summary lists all the capital improvements and payments for debt and leases for the five-year period. The CIP Summary also provides an estimate of fund balance policy compliance based on current year numbers that maintains a balance above 40%.

Project descriptions are provided for each capital improvement. Each project description includes a project scope, cost estimate, phasing if it extends beyond a single-year, funding sources, and connection to the strategic plan and other adopted plans.

The debt management plan follows the CIP and provides a list of current debt obligations and identifies new debt that may be needed soon to fund projects in the CIP.

Town of Wendell - Capital Improvement Program Summary for Fiscal Years 2020 through 2024

FIVE YEAR CAPITAL IMPROVEMENT PROGRAM

	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
<u>CAPITAL REVENUES</u>						
Sales Tax	325,398	600,000	800,000	1,000,000	1,200,000	3,925,398
Powell Bill (Road Funds)	159,589	255,000	175,000	175,000	175,000	939,589
Motor Vehicle License Fee (Auto Decal Fee 75%)		76,084	76,084	76,084	76,084	304,336
NCDOT Locally Admin. Projects Program (LAPP)		1,000,000			1,000,000	2,000,000
Town Hall Loan		5,000,000				5,000,000
Fund Balance Appropriation	696,500					696,500
Wake County Park Bond Funds		200,000	425,000			625,000
PARTF Grant			250,000			250,000
TOTAL CAPITAL REVENUES	1,181,487	7,131,084	1,051,084	1,251,084	2,451,084	12,865,823
<u>LONG-TERM EXPENSES (CAPITAL AND DEBT)</u>						
<u>Capital Expenses</u>						
<u>Transportation and Infrastructure</u>						
Repaving Program		174,894	118,184	121,474	124,691	539,243
Sidewalk Program			100,000	300,000	1,300,000	1,700,000
Wendell Boulevard Sidewalk Project	185,000	1,300,000				1,485,000
Multi-Purpose Trail Project			500,000			500,000
ADA Local Road Compliance	20,000	20,000				40,000
<u>Vehicles, Equipment, and Technology</u>						
Leaf Collector Truck	195,000					195,000
Pickup Truck Replacement (Public Works)	28,000	35,000		35,000		98,000
Mowers (2)	17,000					17,000
Jet Machine				65,000		65,000
Police Vehicle Replacement Program (3 per year)	171,000	171,000	171,000	171,000	171,000	855,000
GIS Plotter				14,000		14,000
Technology Replacement Program	15,000	15,000	15,000	15,000	15,000	75,000
Knuckleboom Truck Replacement			200,000			200,000
Ravo Street Sweeper (2nd Unit Lease)					60,000	60,000
<u>Buildings, Grounds, and Land</u>						
Wendell Park Improvements	25,500					25,500
Park Land Acquisition		400,000				400,000
New Parks Construction			500,000			500,000
Evidence Room Generator		25,000				25,000
Town Hall Project		500,000	4,500,000			5,000,000
<u>Economic and Community Development</u>						
Comprehensive Land Use Plan Update	60,000	60,000				120,000
Downtown Parking and Event Space Project			300,000			300,000
Total Capital Expenses	716,500	2,700,894	6,404,184	721,474	1,670,691	12,213,743
<u>Debt Service and Lease Payments</u>						
General Fund Debt - Principal	229,311	231,035	232,809	112,250	105,500	910,905
General Fund Debt - Interest	27,587	22,820	18,007	13,170	10,128	91,712
Powell Bill Debt - Principal	100,000	100,000	100,000	100,000	100,000	500,000
Powell Bill Debt - Interest	39,589	36,190	32,900	29,610	26,393	164,682
New Debt Issuance for Town Hall			385,000	385,000	385,000	1,155,000
Equipment Lease Payments	68,500	68,500	68,500	68,500	68,500	342,500
Subtotal Debt Service and Lease Payments	464,987	458,545	837,216	708,530	695,521	3,164,799
Total Capital and Debt	1,181,487	3,159,439	7,241,400	1,430,004	2,366,212	15,378,542
Difference (Revenues - Expenditures)	0	3,971,645	-6,190,316	-178,920	84,872	-2,512,719
Fund Balance Policy (over 40%)	88.5	136.6	45.7	43.1	44.3	

**FY 2020 through FY 2024 Capital Improvement Program
Project Descriptions**

A description is provided for each of the projects identified in the CIP. The item descriptions are subject to change due to changing project scope, cost fluctuations, and other factors. All projects are subject to compliance with purchasing and contracts provisions of the Local Government Fiscal Control Act and Town Codes and Policies prior to the expenditure of funds. The projects descriptions are provided in the order listed in the CIP Summary using the four broad categories of projects.

In addition to guidance from departments on core service needs and adopted plans, the Town of Wendell uses the following Asset Replacement Criteria Chart to evaluate vehicles for replacement. All replacement vehicles in the plan meet the criteria to warrant action or are anticipated to do so in the fiscal year the asset is scheduled for replacement in the CIP. Assets are evaluated annually.

**Town of Wendell
Asset Replacement
Criteria Chart**

Type	Points	Description
<i>Age</i>	1	One point assigned for each year of the chronological age, based on in-service date
<i>Mileage/Hours</i>	1	One point assigned for each 10,000 miles of operation or 250 hours
<i>Type of Service</i>	1	Standard sedans, SUVs, Light Trucks (includes admin police vehicles)
	2	Vehicle/equipment that pulls trailer, hauls heavy loads, or has continued off-road usage
	3	Police patrol vehicles
<i>Condition</i>	1	Good condition - minor imperfections in body and paint surface, interior fair (no rips, tear, burns), good drive train
	2	Poor condition - noticeable imperfections in body and paint surface, minor rust, bad interior (one or more rips, tears, burns), weak /noisy drive train
	3	Damaged/lemon condition - previous/current accident damage, poor body and paint surface, rust (holes), bad interior (rips, tears, burns), drive train components damaged or inoperable
<i>Maintenance Cost</i>	1	Low maintenance - costs are less than or equal to 30% of replacement cost
	2	Medium maintenance - costs are 31% to 70% of replacement cost
	3	High maintenance - costs are greater than 71% of replacement cost

Project Title: Repaving Program

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
0	\$174,894	\$118,184	\$121,474	\$124,691	\$539,243

Project Description: The Town of Wendell is responsible for maintaining 28.12 miles of public local roads. The average lifespan of an asphalt road surface is 15 to 20 years with proper maintenance. Average resurfacing costs vary between \$35 to \$42 per linear foot. The Town resurfacing schedule is currently on a 22 year cycle using a \$38 unit cost and total funds available annually from the Powell Bill and Auto Decal Fee (approximately \$250,000). The repaving program identifies funding available that is available beyond the debt service for past resurfacing projects. Unspent funds will be programmed into the available funds for the following year. It is typical for the Town to defer annual spending for several years to achieve a better project cost due to reduced mobilizations or to take advantage of material costs. The Town has the local roads evaluated regularly and ranked based on physical condition to establish the project list. Project cost and available funding are also used to prioritize the project list. The Town is obtaining engineering services to evaluate the roads in FY 2020.



Funding Sources: Powell Bill funds not allocated to debt service and 75% of Motor Vehicle License Fee (Auto Decal Fee).

Connection to Adopted Plan(s): Strategic Plan initiative to implement a street repaving program.

Project Title: Sidewalk Program

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
0	0	\$100,000	\$300,000	\$1,300,000	\$1,600,000

Project Description: Project implements a recurring sidewalk program to provide for the extension and replacement of sidewalks in the Town. The program will implement sidewalk projects identified in the 2017 Comprehensive Pedestrian Plan and will leverage local funds with state and federal programs. FY 2022 initiates minor replacements and repairs in coordination with the completion of the Wendell Boulevard Sidewalk project that is identified as a separate project. FY 2023 continues minor projects and completes the design for a larger project submission in FY 2024 that is yet to be determined. Specific streets and improvements will be identified in FY 2021.



Funding Sources: \$1,000,000 from the NCDOT Locally Administered Projects Program (LAPP) and \$600,000 from the General Fund.

Connection to Adopted Plan(s): Strategic plan initiatives to establish a sidewalk maintenance and extension program and identify projects for state and federal funding. Implements projects identified in the 2017 Comprehensive Pedestrian Plan.

Project Title: Wendell Boulevard Sidewalk Project

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
\$185,000	\$1,300,000	0	0	0	\$1,485,000

Project Description: This project involves completion of design, ROW acquisition, constructoin, and NEPA documentation for a planned sidewalk connection between Wendell Elementary and Hanor Lane, as well as closing Wall Street and signaling the intersection of Wendell Blvd and Wendell Falls Pkwy. The consultant would determine ROW acquisition needs, identify utility conflicts, and develop a plan to provide a 5 foot sidewalk along the north/east side of Wendell Boulevard to bridge the existing gap. In order to provide a safe connection to the school, this would also involve the realignment or crossing of Marshburn Road as it approaches Wendell Blvd.

The design would also account for how to move or adjust any utility or drainage conflicts, identify where easements may be required, identify areas where curbing may be needed, and provide for safe pedestrian crossings at driveways and intersections. All work would be performed in a manner which is compliant with LAPP projects. The completion of this project would then allow the Town to subsequently apply for a LAPP project to complete the ROW acquisition and construction of the project. The cost of the subsequent LAPP project is estimated at \$1.3 Million of which the Town would be responsible for at least 20% to 30%.



Funding Sources: FY 2020 funding is from the General Fund. FY 2021 funding is \$1,000,000 from the NCDOT Locally Administered Projects Program (LAPP) with a \$300,000 local match funded from the General Fund.

Connection to Adopted Plan(s): Strategic Plan initiative and 2017 Comprehensive Pedestrian Plan recommended project.

Project Title: Multi-Purpose Trail Project

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
0	0	\$500,000	0	0	\$500,000

Project Description: Project will identify potential shared use paths and prioritize projects for implementation. The project uses Town funds to leverage County and other funds available to construct approximately 1 to 2 miles of 10 foot wide asphalt trail. Conceptual projects include trails between Wendell Park and Downtown along Buffalo Creek or extending the existing Wendell Falls Parkway shared use path.



Funding Sources: \$300,000 from Wake County (or other trails grant) and \$200,000 from the General Fund.

Connection to Adopted Plan(s): Strategic Plan initiatives, 2017 Comprehensive Pedestrian Plan, and the Wake County Greenway Plan.

Project Title: ADA Local Road Compliance

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
\$20,000	\$20,000	0	0	0	\$40,000

Project Description: The NCDOT is partnering with the Town in FY 2020 to update intersection crossings to meet the requirements of the Americans with Disabilities Act (ADA). The project uses federal Transportation Alternatives Program (TAP) funds that have a 80:20 match ratio for federal to state or local funds. The NCDOT is planning to make improvements at 20 intersections of state maintained roads and will cover the match. One local road will also be addressed at that time that the Town will provide the local match. The project provides funding for local match improvements in FY 2020 and FY 2021 and additional funding for sidewalks and intersctions as needed to improve accessibility and ADA compliance.



Funding Sources: \$40,000 provided from Powell Bill. Project budget may expand to include Federal Transportation Alternatives Program (TAP) funds through NCDOT with a 80:20 Federal to Local funding ratio using the Powell Bill funds as the match if available.

Connection to Adopted Plan(s): Strategic Plan initiative and 2017 Comprehensive Pedestrian Plan recommendation.

Project Title: Leaf Collector Truck

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
\$195,000	0	0	0	0	\$195,000

Project Description: Replaces the leaf truck placed out of service in FY 2019. The vehicle serves as the primary and most efficient means of maintaining leaf and limb service for the Town. The vehicle will be used all year with the tow-behind unit also being used during peak leaf season. Public Works is evaluating different brands of vehicle and will initiate the procurement process upon adoption of the budget in an attempt to receive delivery during peak leaf season.



Funding Sources: \$195,000 funding from the General Fund.

Connection to Adopted Plan(s): No connection to plans. Restores existing level of service after wreck of leaf truck in FY 2019.

Project Title: Pickup Truck Replacement Schedule (Public Works)

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
\$28,000	\$35,000	0	\$35,000	0	\$98,000

Project Description: The project provides for the replacement of pick-up trucks used by Public Works consistent with the asset replacement schedule. The truck planned for FY 2020 is a 1/2 ton quad cab comparable to the Chevy 1500. The trucks scheduled for FY 2021 and FY 2023 are larger 3/4 to 1 ton quad cabs comparable to Chevy 2500 or 3500 vehicles. The Public Works Director will use the smaller vehicle purchased in FY 2020 and the larger vehicle assigned to the Director will be used by a public works crew. The truck currently used by the crew will be taken out of service and surplus as recommended by the asset replacement schedule.



Funding Sources: \$98,000 funding from the General Fund.

Connection to Adopted Plan(s): No connection to plans. Maintains existing level of service.

Project Title: Mower Replacement (2 existing in Public Works)

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
\$17,000	0	0	0	0	\$17,000

Project Description: Replacement of two (2) Hustler mowers purchased in 2011 that are having electrical issues and maintenance costs beyond justification of retaining the equipment. Both are recommended for replacement by the asset replacement schedule. With the growth of the Town jurisdiction, reliable and efficient equipment is necessary to maintain service levels of the Landscaping crew.



Funding Sources: \$17,000 funding from the General Fund.

Connection to Adopted Plan(s): No connection to plans. Maintains existing level of service.

Project Title: Jet Machine (Public Works - Stormwater)

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
0	0	0	\$65,000	0	\$65,000

Project Description: The jet machine is used by the Stormwater crew to maintain stormwater pipes and culverts as required by regulations. Currently, the Town does not own a jet machine and hires a contractor to perform the work. Public Works is evaluating existing stormwater infrastructure conditions and needs to improve the stormwater program to meet regulatory requirements. Until the program is updated and the jet machine is purchased, the Town will continue to use contract assistance in maintaining the system. The cost of the jet machine will be offset by the cost of paying an outside contractor over the life of the equipment.



Funding Sources: \$65,000 funding from the General Fund.

Connection to Adopted Plan(s): No connection to plans. Maintains existing level of service.

Project Title: Police Vehicle Replacement Program

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
\$171,000	\$171,000	\$171,000	\$171,000	\$171,000	\$855,000

Project Description: The asset replacement schedule necessitates the replacement of three (3) police vehicles per year based on the number of vehicles in the fleet and positions that require a vehicle. For FY 2020, two (2) replacement vehicles and one (1) new vehicle are recommended as a mid-year purchase of two (2) vehicles was approved in FY 2019 (one replacement and one new). The regular replacement schedule of three (3) vehicles per year is programmed for FY 2021 through FY 2024. The addition of new officers to the department during this period will also necessitate an additional vehicle being added to the purchase schedule.



Funding Sources: \$855,000 funding from the General Fund.

Connection to Adopted Plan(s): No connection to plans. Maintains existing level of service.

Project Title: GIS Plotter Replacement

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
0	0	0	\$14,000	0	\$14,000

Project Description: Replacement of the Town's Wide Format Plotter (to print large format maps). The Town's existing large format plotter is 12+ years old. It is still functioning, but is nearing the end of its useful life. While this is not something in immediate need of replacement, it will likely need replacement within the next few years . Actual cost can vary widely based the desired functionality. A Plotter which does not include scanning/copying functionality could be purchased for less than the estimated amount.



Funding Sources: \$14,000 funding from the General Fund.

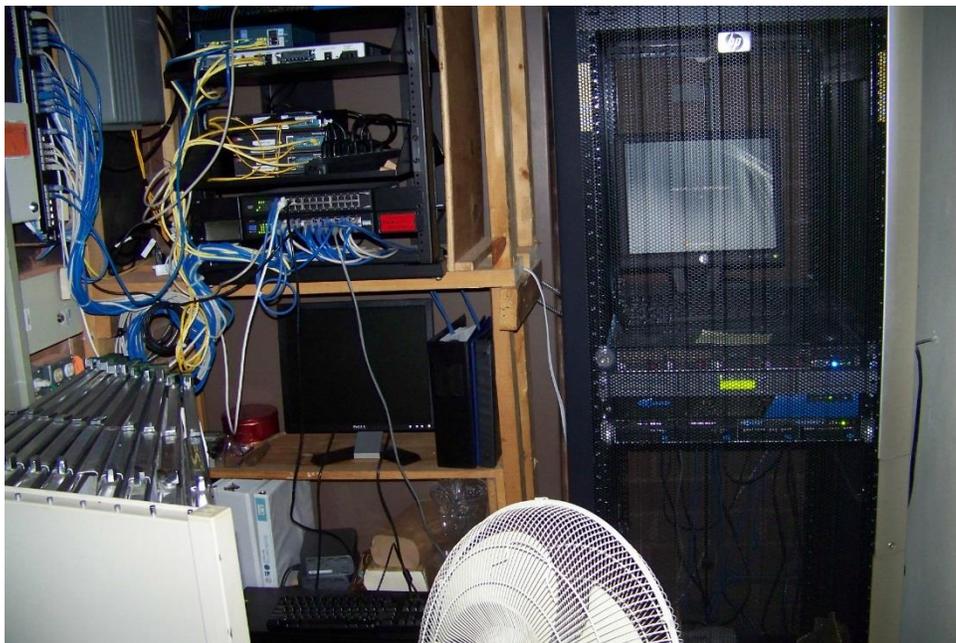
Connection to Adopted Plan(s): No connection to plans. Purchase maintains existing level of service.

Project Title: Technology Replacement Program

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
\$15,000	\$15,000	\$15,000	\$15,000	\$15,000	\$75,000

Project Description: The project provides for the regular replacement of technology for the organization including servers, work stations, monitors, and laptops. The information technology (IT) program will be evaluated and restructured in FY 2020 with the release of an RFP for IT services that includes the replacement of technology in the scope of services. As such, this capital improvement project will be amended next year to reflect the actual IT program in place. Until then, this project provides for the emergency replacement of technology.



Funding Sources: \$75,000 funding from the General Fund.

Connection to Adopted Plan(s): No connection to plans. Maintains existing level of service.

Project Title: Knuckleboom Truck Replacement

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
0	0	\$200,000	0	0	\$200,000

Project Description: Replacement of a 2012 knuckleboom loader in FY 2022 to provide for continued service. The vehicle is used for heavy debris and waste pickup weekly and is in full-service. With the purchase of a new knuckleboom truck in FY 2019, this vehicle will be used in an a reserve capacity during the 5-year lease period of the new vehicle. If the leased vehicle is purchased, the 2012 vehicle will be sold for surplus. The equipment will be evaluated annually to determine when replacement is necessary though the asset replacement schedule currently identifies it as eligible for replacement.



Funding Sources: \$200,000 funding from the General Fund.

Connection to Adopted Plan(s): No connection to plans. Maintains existing level of service.

Project Title: Ravo Street Sweeper

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
0	0	0	0	\$60,000	\$60,000

Project Description: The continued addition of development in Wendell Falls and other developments with cul-de-sacs and narrow streets will necessitate the addition of a second Ravo street sweeper to the vehicle fleet in FY 2024. The amount programmed is a lease payment consistent with the current vehicle that was acquired with a five-year lease.



Funding Sources: \$60,000 funding from the General Fund.

Connection to Adopted Plan(s): No connection to plans. Maintains existing level of service.

Project Title: Wendell Park Improvements

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
\$25,500	0	0	0	0	\$25,500

Project Description: The capital improvement extends the life of Wendell Park by providing WiFi service in the park (\$10,000) to enhance customer experience, gutter guards on the community center (\$8,000) for employee safety, replaces stairs in the gym (\$3,500) for maintenance and safety, and evaluates access from the community center to the lower parking area to potentially add stairs across the rock drainage area (\$4,000). Additional improvements and capital needs at the Wendell Park are deferred until the completion of the Parks and Recreation Master Plan in FY 2020.



Funding Sources: \$25,500 funding from the General Fund.

Connection to Adopted Plan(s): Consistent with Strategic Plan Goal 4 for Parks, Recreation, Special Events, and Culture and initiatives to update the Wendell Town Park. Project also maintains existing level of service.

Project Title: Park Land Acquisition

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
0	\$400,000	0	0	0	\$400,000

Project Description: This project provides for the purchase of 20 to 40 acres of land for a future park site as identified by the Parks and Recreation Master Plan. Depending on the findings and recommendations of the Plan, this project may expand, be deferred, and/or have alternative funding identified.



Funding Sources: \$200,000 Wake County Park funds (or similar funding source) and \$200,000 from the General Fund. Evaluation of this project will occur based on recommendations of the Parks and Recreation Master Plan and potential borrowing for the Town Hall Project.

Connection to Adopted Plan(s): consistent with Strategic Plan initiatives to implement the Parks and Recreation Master Plan and to identify the next active recreation park site.

Project Title: New Parks Construction

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
0	0	\$500,000	0	0	\$500,000

Project Description: This project provides for the construction of a future park site as identified by the Parks and Recreation Master Plan. Depending on the findings and recommendations of the Plan, this project may expand, be deferred, and/or have alternative funding identified. Staff will seek to leverage Town funds to receive county, state, and/or federal grant assistance.



Funding Sources: \$250,000 funding from the Parks and Recreation Trust Fund (PARTF), \$125,000 from the Wake County Parks fund, and \$125,000 from the General Fund. Evaluation of this project will occur based on recommendations of the Parks and Recreation Master Plan and potential borrowing for the Town Hall Project.

Connection to Adopted Plan(s): Strategic Plan initiative

Project Title: Evidence Room Generator

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
0	\$25,000	0	0	0	\$25,000

Project Description: The Police Department facility was purchased by the Town in FY 2018. The facility does not have a generator to provide either whole or partial building power service in the event of a loss of electrical service. A generator is necessary to provide for a continuation of service and preservation of evidence (when applicable) during such an outage. While other arrangements for using other facilities is currently made, it creates a hardship on the department during a time that the service of the department is needed most by the community. The project provides funding for the installation of a commercial generator in FY 2021. During FY 2020, the Public Works Department will work with the Police Department and an outside contractor to design and plan for the installation.



Funding Sources: \$25,000 funding from the General Fund. Staff will assess grant availability for the project in FY 2020.

Connection to Adopted Plan(s): No connection to plans. Purchase maintains existing level of service.

Project Title: Town Hall Project

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
0	\$500,000	\$4,500,000	0	0	\$5,000,000

Project Description: The current Town Hall was constructed in 1963 and served as the fire station, police station, magistrate court, and Town offices. While currently it is only used as a Town Hall, space is at a premium and viable office space remaining is limited and will require loss of other functional uses (i.e. conference room or permitting space). The Town has acquired the services of the Cumming Corporation to evaluate the current structure and estimate future needs. The consultant will consider both a renovation and addition at the current site and a new-build construction and report findings and recommendations to the Town in 2019. The Town Hall Project will take the findings of the evaluation to complete a design for the "new" Town Hall in FY 2021 followed by construction in FY 2022 for the accepted option.



Funding Sources: Loan proceeds will be used to fund \$500,000 of design in FY 2021 and \$4,500,000 of construction in FY 2022.

Connection to Adopted Plan(s): Strategic Plan initiative to prioritize facility and grounds needs for inclusion in the CIP.

Project Title: Comprehensive Land Use Plan Update

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
\$60,000	\$60,000	0	0	0	\$120,000

Project Description: Update of the Wendell Comprehensive Plan to reflect changing demographics, community preferences, growth patterns, and desired community outcomes. The project will start in FY 2020 and be finished in FY 2021. The current Comprehensive Plan was adopted 11 years ago and no longer effectively reflects the Town's predicted growth patterns or desired community vision. As a result, it's usefulness for guiding other adopted plans, planning initiatives, and capital expenditures is becoming increasingly limited.

Project Scope:

1. Review of Existing Background Data and Policy context
2. Conduct a Growth Capacity and Market Analysis
3. Perform initial collection of public input on desired future vision (Questionnaires/Surveys)
4. Develop Draft Goals and Objectives, with related policy recommendations
5. Develop Draft Land Use Plan
6. Community Review of Draft Products (Comprehensive Charrette process)
7. Based on community and Citizen Board review, finalize the final report
 - a. Final Report to include appropriate goals, objections, implementation strategies with timelines, maps, illustrations, and all necessary background information and appendices.
 - b. Final Report must also include action plans for integrating the implementation strategies into ongoing planning, evaluation and budgeting processes for both capital and operating budgets, including key performance measures.

Funding Sources: \$120,000 funding from the General Fund.

Connection to Adopted Plan(s): Strategic Plan initiative to update the Comprehensive Land Use Plan as part of Goal 1 for Downtown Vibrancy, Economic Growth, and Community Character. Capital improvement updates an adopted plan.

Project Title: Downtown Parking and Event Space

Estimated Project Budget:

FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	Total
0	0	\$300,000	0	0	\$300,000

Project Description: The project will provide improved parking areas designed as flexible areas for parking, events, and outdoor seating in the Campen Street area between Main Street and Pine Street. The project will also seek to improve pedestrian connectivity between the two streets. The timing of the project is variable depending on the timing and design needs of adjoining buildings and uses. The scope of the project is also contingent on the approval of a lease agreement with property adjoining the Campen Street right-of-way. The project includes both design and construction costs in the project budget. Initial steps will occur in FY 2019 to begin the lease agreement, replace utilities, pave the main drive, and place millings to smooth adjoining parking areas. The paving is being completed by the City of Raleigh in coordination with the utility replacement and the milling material and placement will be completed by Public Works at no additional cost to the Town.



Funding Sources: \$300,000 funding from the General Fund. Staff will also seek to leverage the funding with state and foundation grants.

Connection to Adopted Plan(s): Strategic Plan initiative.

Debt Management Program

The FY 2020 budget does not plan for a new debt issuance in this fiscal year. This section will provide graphics that identify the current long-term debt, a summary of the estimated changes in long-term debt for FY 2020, and the computation of the legal debt margin as required by the Local Government Fiscal Control Act (LGFCA). The debt margin represents the balance available that the Town could legally borrow.

The annual debt service requirements related to debt are:

Annual Debt Service Requirements					
Year Ending June 20	Governmental Activities		Business-type Activities		Total
	Principal	Interest	Principal	Interest	
2019	\$ 450,536	\$ 77,932	\$ 417,048	\$ 50,342	\$ 995,858
2020	329,311	67,176	417,048	39,957	853,492
2021	331,035	59,010	417,048	29,572	836,665
2022	332,808	50,906	417,048	19,187	819,950
2023	212,249	42,780	381,886	8,802	645,717
2024-2028	922,000	124,128	-	-	1,046,128
2029-2031	300,000	19,740	-	-	319,740
	\$2,877,939	\$ 441,672	\$ 2,050,078	\$ 147,860	\$ 5,517,549

A summary of estimated changes in long-term debt in FY 2020 is as follows:

FY 2020 Estimated Changes in Long-Term Debt				
	Estimated Balance June 30, 2019	Estimated Additions	Estimated Retirements	Estimated Balance June 30, 2020
General Fund Debt	\$ 2,791,143	\$ -	\$ 396,487	\$ 2,394,656
Water and Sewer Fund Debt	\$ 1,730,548	-	457,005	\$ 1,273,543
Total Debt	\$ 4,521,691	\$ -	\$ 853,492	\$ 3,668,200

The computation of the legal debt margin is as follows:

Computation of Legal Debt Margin	
Estimated Assessed Valuation - FY 2019	\$ 657,589,503
Debt Limit (at 8% of assessed valuation)	\$ 52,607,160
Net Debt	\$ 3,668,200
Legal Debt Margin	\$ 48,938,960

Supplemental and Statistical Materials

The supplemental and statistical section of the budget provides the context for understanding the decisions made in developing the budget. This is accomplished by providing the history and form of government, demographics and statistics, a comparison of rates and fees with other communities, the proposed FY 2020 fee schedule, a list of outside agency service partners, and a glossary of terms and acronyms commonly used in local government. The information provided is intended to reflect the environment in which the budget is developed by gaining understanding where the community came from, the political environment in which decisions are made, the people and economy that are served, and the language that is used in the budget.

History of Wendell – A Small Town with Big Charm

The Town of Wendell started in the 1850's when Tobacco Farmers in nearby Granville County were impacted by what came to be known as the Granville County Wilt. With the failure of the tobacco crop, the farmers moved into eastern Wake County looking for fertile soil to plant their crops. With the influx of farming families, Ambrose Rhodes donated land for a school to be built. The new school was called the Rhodes School and was located on the same site as the current Wendell Elementary School on Wendell Boulevard. The school grew with the community and the name was changed to the Wendell Academy in 1891.



The growth of the farming community induced the formation of a small village. The establishment of “community” led to the need for a name. The population asked the school teacher, M.A. Griffin, to come up with a name for this area. The teacher’s favorite poet, Oliver Wendell Holmes, inspired the new town to be named Wendell in honor of the poet. However, the arrival of the railroad changed the pronunciation of the name. The railroad porters calling out, “WEN-DELL”, emphasizing each syllable led the townspeople to use the oft repeated, new pronunciation that continues to this day by locals.

Continued growth encouraged a post office in 1891 which was restored by the Wendell Historical Society and remains on the corner of Fourth Street and Oakland Street. However, the oldest institution in the community was religion, with the establishment of Hephzibah Baptist Church in 1809. The incorporation of the Town in 1903 and election of its first Mayor led to establishment of Main Street and further growth of the community as a regional tobacco center and railroad stop. The first newspaper, the Wendell Clarion, was opened in 1911 and succeeded by the Gold Leaf Farmer. The County constructed a new brick school in 1911 and graduated its first class in 1915. The Town government accepted the Council-Manager form of government in 1934 and hired its first manager.



While railroad passenger service and tobacco farming are parts of the community's past, the Town of Wendell retains its historic Downtown and role as a regional hub in the greater Raleigh metro area. Although the railroad spur remains active, the population is served by convenient interstate access to Raleigh and benefits from the high quality of life of the Triangle Region of North Carolina. With demographics of the population constantly evolving, Wendell retains its "Small Town, Big Charm" motto. This character is attracting a new generation of migrants seeking "fertile soil" in a welcoming and affordable community to recreate, thrive, and live as part of an exceptional small town.

Form of Government

The Town of Wendell adopted the Council-Manager form of government in 1934 as is reflected in the Town Charter and Town Code of Ordinances. The Mayor and five Commissioners are elected at-large and serve staggered, four-year terms. A municipal election will be held in November 2019 to elect the Mayor and two Commissioners. In November 2021, a municipal election will be held to elect three Commissioners. The Board of Commissioners select one of its members to act as Mayor Pro Tempore to perform the duties of the Mayor in the Mayor's absence. For budgetary purposes, the Board of Commissioners vote on the adoption of the Budget Ordinance that sets the revenues and expenses for the next fiscal year in accordance with the North Carolina Local Government Fiscal Control Act (LGFC). The Mayor only votes in the event of a tie vote by the Board of Commissioners.

The Town Manager is appointed by the Board of Commissioners and is the head of the administrative branch of the city government and serves at the pleasure of the Board of Commissioners. The Town Manager is appointed as the Town budget officer as proscribed by the LGFC. The budget officer is responsible for the preparation of the annual budget for submission to the Board of Commissioners and to execute the annual budget ordinance and any project ordinances.

The Finance Director is appointed as the Finance Officer under the LGFC. In this capacity as the chief financial officer for the Town, the Finance Director is responsible for establishing and maintaining the accounting system, controlling expenditures and dispersing moneys, preparing and presenting financial reports, managing the receipt and deposit of moneys, managing the debt service obligations, and supervising investments.

Population, Demographics, and Statistics

The Town of Wendell is growing due to large-scale development like Wendell Falls and a growing number of small to mid-size residential developments. The last population estimate from the NC Office of State Budget and Management was 6,843 on July 1, 2017. The Wake County Planning Department estimated the population to be 7,566 as of July 1, 2018, a 10.6% increase from the prior year State estimate. A comparative 10% growth rate during FY 2019 would result in a projected population of 8,322 as of July 1, 2019. The following projection provides for a 4% growth rate over a 10-year period in addition to the Wendell Falls development.

Town of Wendell					
Population History and Projection					
Year	Estimated Population	4% Projection	Wendell Falls 3,606 Units	Wendell Falls Pop. Growth	Total Town Population
2007	5,742				5,742
2008	5,798				5,798
2009	6,001				6,001
2010	5,886				5,886
2011	6,001				6,001
2012	6,093				6,093
2013	6,149				6,149
2014	6,224				6,224
2015	6,337		104		6,337
2016	6,533		152		6,533
2017	6,843		200		6,843
2018	7,566		200		7,566
2019		7,869	300	633	8,501
2020		8,183	250	696	9,512
2021		8,511	250	633	10,471
2022		8,851	300	696	11,508
2023		9,205	250	696	12,557
2024		9,573	250	633	13,558
2025		9,956	300	696	14,637
2026		10,355	250	696	15,731
2027		10,769	250	633	16,778
2028		11,200	300	696	17,904
2029		11,648	250	696	19,048
2030		12,113		316	19,830



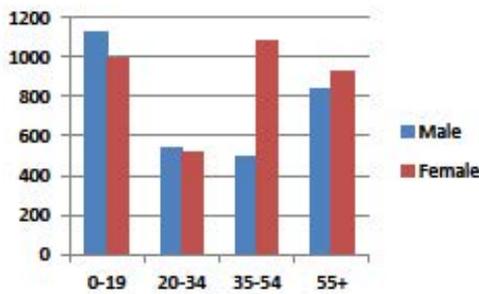
Wake County, North Carolina
Demographic and Housing Data Fact Sheet

Town of Wendell

Population

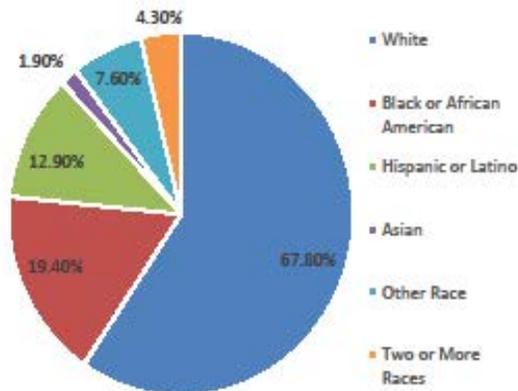
2017 Population Estimate:	7,261
Male:	3,340 (46%)
Female:	3,921 (54%)
2010 Population:	5,845

2017 Population by Age:	
0-19	32.7%
20-34	16.3%
35-54	24.2%
55+	27.1%



Median Age, Corporate Limits: 37

Race and Ethnicity

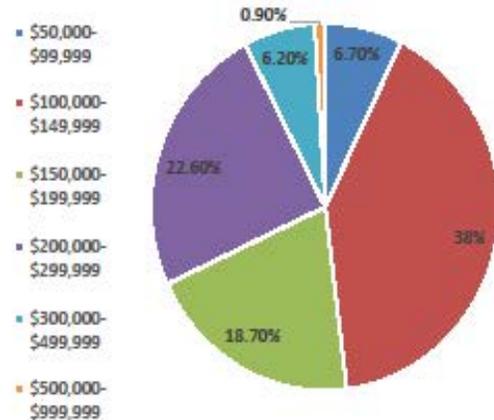


Housing

Average Family Size:	3
Total Housing Units, 2013-2017:	2,691
Occupied:	2,454 (91.2%)
Owner Occupied:	1,744
Renter Occupied:	710
Vacant:	237 (8.8%)



Housing Value:



Median Housing Value (2016): \$183,200
Source – Wake County Tax Assessor

Gross Rent, occupied units	
\$0 - \$499	15.3%
\$500 - \$999	38.1%
\$1000 - \$1499	37.7%
\$1,500 & above	9.0%
Median Rent	\$933

Source (all data unless otherwise noted): U.S. Census Bureau

Last Updated: February 28, 2019

Town of Wendell



Wake County, North Carolina

Quick Fact Data Sheet

Demographics

2010 Population: 5,845
2017 Estimated Population: 7,261

Source: U.S. Census Bureau

For zip code 27591, ETJ Limits:

Number of Employees: 2,710
Number of Businesses: 316
Annual Payroll in Millions of Dollars: \$111.4

Source: Census Zip Code Business Patterns, 2016

Median Age, Corporate Limits: 37
Housing Units, 2017: 2,691

Source: U.S. Census Bureau

Some College, Associate's Degree or higher: 63%
Median Family Income: \$53,730
Owner-Occupied Housing: 71.1%

Source: ACS 5-Year Estimates, 2013-2017

Welcome to WENDELL

*** Small Town, Big Charm ***

Location

Corporate Limits, 2/2019: 5.75 sq mi
Extraterritorial Jurisdiction (ETJ), 2/2019: 9.46 sq mi

Source: Town of Wendell Planning Department



Finances

Tax Base, 2018-2019: \$657,589,503
 79% Residential / 21% Commercial

Source: Wake County Revenue Department

General Fund Budget, 2018-2019: \$6,309,570

Source: Town of Wendell Finance Department

Top 5 Tax Revenue Generators in 2018:

- 1) NASH Wendell Falls, LLC
- 2) MLC Automotive, LLC
- 3) Daedong USA Inc
- 4) Measurements Group Inc
- 5) Tidewater Investors, LLC

Source: Wake County Revenue Department

Tax Rates 2018:

Town of Wendell \$0.490 per \$100 valuation
Wake County \$0.6544 per \$100 valuation

Source: Wake County Revenue Department

Number of Town Employees (Full-Time Only): 47

Source: Town of Wendell Finance Department

Recreation

Wendell Park and Community Center: 103 acres (est.)
 601 W. Third Street, Wendell-NC
 (919) 366-2266

Amenities: Wendell Community Center, Tennis Courts, Dog Park, Frisbee Golf, Doug Proctor Field, Wendell Park Large Field, Hugh T. Moody Nature Trail, Fitness Trails, Large Picnic Shelter, Small Picnic Shelter, Playgrounds

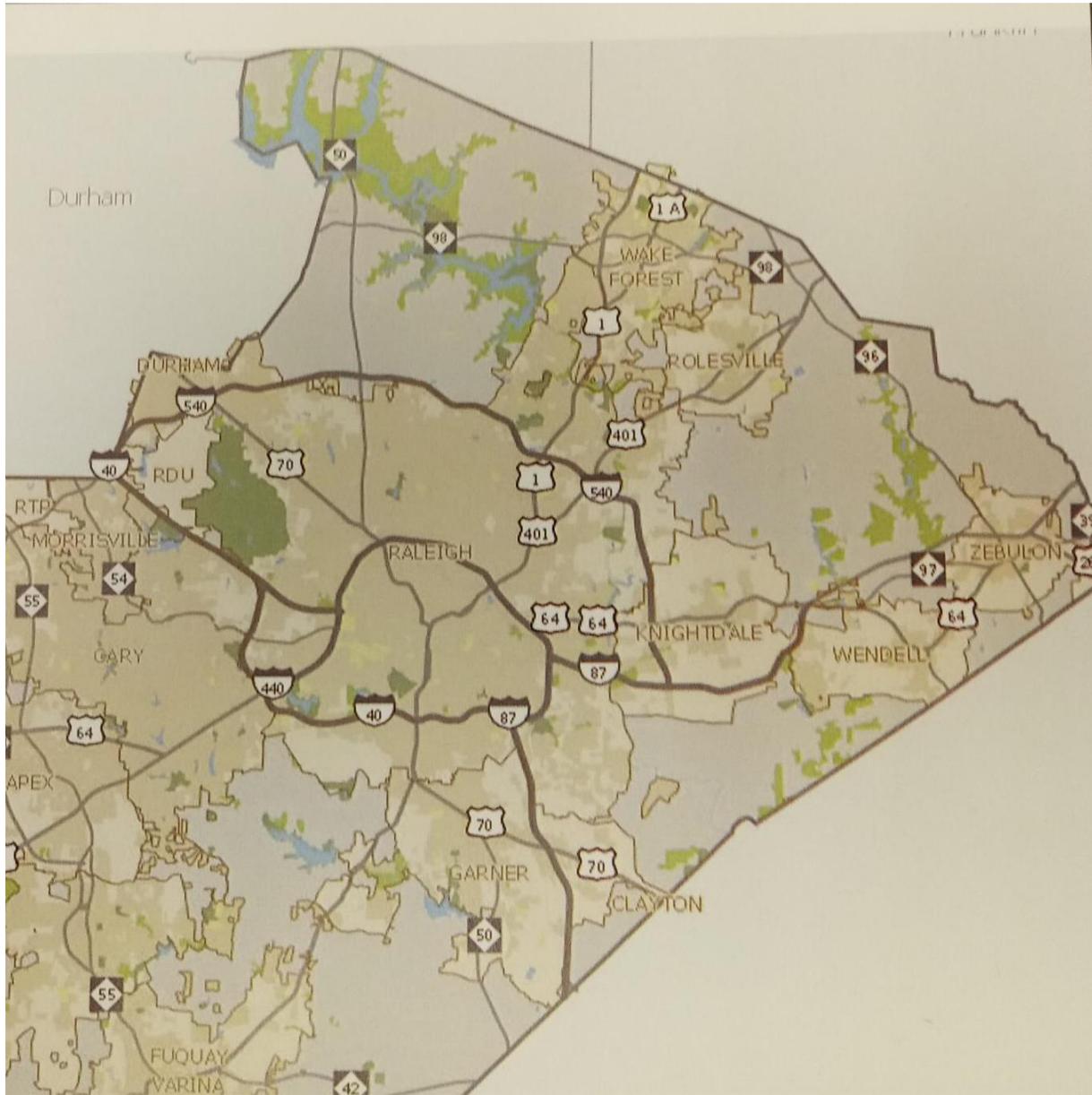
Additional: Lake Myra County Park * Lake Myra School Fields * East Wake Community Field * Wendell Middle School Gym and Fields * Carver Elementary Ball Fields * Thompson Field * Wendell Elementary School Gym * Town Square * Old Carver School Field * Buffalo Creek Cypress Swamp * Robertson's Mill Pond Preserve * Proctor Farm Preserve * Turnipseed Nature Preserve

Source: Town of Wendell Parks and Recreation Department



Last Updated: February 28, 2019

Area Map:



Comparative Rates and Fee Schedules

The evaluation of neighboring tax rates, assessed valuation, and fees assist in the development of the budget. While a fiscal goal is to maintain a competitive rate and fee structure, the individual economic, demographic, and political environments can lead to variation.

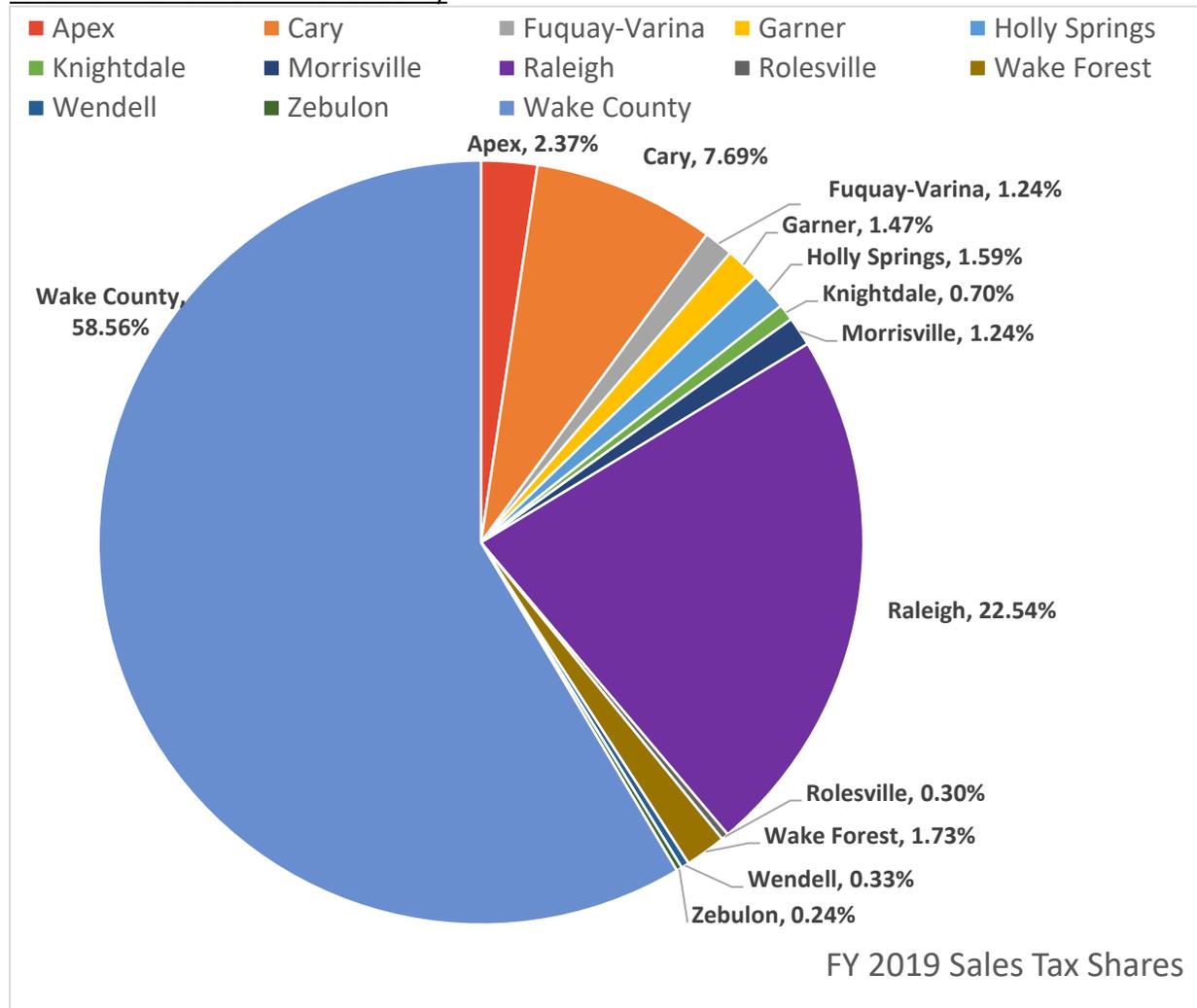
Property Tax, Assessed Value, and Median House:

The assessed value for the Town of Wendell is the lowest in Wake County due to the amount of residential property, limited commercial development, and a low median house value. The property tax rate (Town and Fire combined) is attributed to this statistic as the provision of core municipal services requires the higher rate to generate comparable revenues to pay for the services. This trend is changing with increased development (moderate value residential and commercial) and rate increases in adjoining communities.

Wake County Cities and Towns Tax Comparison										
FISCAL YEAR 2019										
CITY/TOWN	TOTAL VALUE		TAX RATE	ADD'T'L RATES	* PENNY VALUE	# SFD UNITS	FIRE TAX	MED. HOUSE	PROPERTY TAX	FIRE TAX
Commercial	\$1,481,202,443	21%								
Residential	\$5,544,798,575	79%								
Apex	\$7,026,001,318		0.415		\$688,548	15448		\$ 275,800	\$1,144.57	
Commercial	\$7,914,422,661	30%								
Residential	\$18,255,258,878	70%								
Cary	\$26,169,681,539		0.35		\$2,564,629	47191		\$ 307,260	\$1,075.41	
Commercial	\$849,785,715	25%								
Residential	\$2,491,156,114	75%								
Fuquay-Varina	\$3,340,941,829		0.4325		\$327,412	9682		\$ 214,785	\$ 928.95	
Commercial	\$1,617,114,945	47%								
Residential	\$1,859,442,440	53%								
Garner	\$3,476,557,385		0.5325		\$340,703	8716		\$ 157,015	\$ 836.10	
Commercial	\$787,068,642	17%								
Residential	\$3,835,737,392	83%								
Holly Springs	\$4,622,806,034		0.4325		\$453,035	11338		\$ 260,760	\$1,127.79	
Commercial	\$630,165,463	36%								
Residential	\$1,124,304,019	64%								
Knightdale	\$1,754,469,482		0.43		\$171,938	4923		\$ 182,735	\$ 785.76	
Commercial	\$2,502,707,827	53%								
Residential	\$2,215,080,010	47%								
Morrisville	\$4,717,787,837		0.39	0.10	\$462,343	6321		\$ 285,345	\$1,112.85	
Commercial	\$24,420,360,994	41%								
Residential	\$35,529,376,929	59%								
Raleigh	\$59,949,737,923		0.4382	0.2129	\$5,875,074	119200		\$ 195,600	\$ 857.12	
Commercial	\$104,040,892	11%								
Residential	\$854,016,831	89%								
Rolesville	\$958,057,723		0.48		\$93,890	2543		\$ 274,520	\$1,317.70	
Commercial	\$1,284,013,196	25%								
Residential	\$3,880,902,332	75%								
Wake Forest	\$5,164,915,528		0.52	0.14	\$506,162	12321		\$ 258,975	\$1,346.67	
Commercial	\$136,492,424	21%								
Residential	\$521,097,079	79%								
Wendell	\$657,589,503		0.49	0.096	\$64,444	2605	\$143.96	\$ 128,220	\$ 628.28	\$ 123.09
Commercial	\$809,118,236	73%								
Residential	\$300,921,965	27%								
Zebulon	\$1,110,040,201		0.592		\$108,784	1652		\$ 117,275	\$ 694.27	
Commercial	\$48,454,692,372	33%								
Residential	\$99,131,321,981	67%								
Wake County	\$147,586,014,353		0.6544	0.096	\$14,463,429	65067	\$270.74	\$ 236,330	\$1,546.54	\$ 226.88

* 98% collection rate

Sales Tax Distribution in Wake County:



Vehicle License Tax (Auto Decal Fee):

		Fiscal Year				
		2015	2016	2017	2018	2019
Municipality	<i>Apex</i>	\$ 5.00	\$ 5.00	\$ 10.00	\$ 15.00	\$ 20.00
	<i>Cary</i>	\$ 15.00	\$ 15.00	\$ 15.00	\$ 15.00	\$ 30.00
	<i>Fuquay-Varina</i>	\$ 5.00	\$ 5.00	\$ 5.00	\$ 15.00	\$ 20.00
	<i>Garner</i>	\$ 15.00	\$ 15.00	\$ 15.00	\$ 15.00	\$ 30.00
	<i>Holly Springs</i>	\$ 10.00	\$ 10.00	\$ 10.00	\$ 10.00	\$ 10.00
	<i>Knightsdale</i>	\$ 15.00	\$ 15.00	\$ 15.00	\$ 15.00	\$ 15.00
	<i>Morrisville</i>	\$ 15.00	\$ 15.00	\$ 15.00	\$ 15.00	\$ 30.00
	<i>Raleigh</i>	\$ 30.00	\$ 30.00	\$ 30.00	\$ 30.00	\$ 30.00
	<i>Rolesville</i>	\$ 10.00	\$ 10.00	\$ 10.00	\$ 10.00	\$ 10.00
	<i>Wake Forest</i>	\$ 15.00	\$ 15.00	\$ 15.00	\$ 15.00	\$ 25.00
	<i>Wendell</i>	\$ 10.00	\$ 10.00	\$ 20.00	\$ 20.00	\$ 20.00
<i>Zebulon</i>	\$ 10.00	\$ 10.00	\$ 10.00	\$ 10.00	\$ 10.00	

Solid Waste and Recycling Fees:

		Solid Waste					Recycling				
		Fiscal Year					Fiscal Year				
		2015	2016	2017	2018	2019	2015	2016	2017	2018	2019
Municipality	Apex	\$ 9.92	\$ 9.92	\$ 7.97	\$ 8.17	\$ 8.30	\$ 2.41	\$ 2.41	\$ 3.31	\$ 3.39	\$ 3.44
	Cary										
	Fuquay-Varina					\$ 14.25	\$ -	\$ -	\$ -	\$ -	
	Garner	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
	Holly Springs	\$ 9.50	\$ 9.50	\$ 9.69	\$ 9.69	\$ 9.69	\$ 4.25	\$ 4.25	\$ 4.34	\$ 4.34	\$ 4.34
	Knightdale			\$ 10.93	\$ 11.08	\$ 11.08			\$ 2.88	\$ 3.75	\$ 3.75
	Morrisville	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Raleigh	\$ 10.70	\$ 11.45	\$ 12.20	\$ 12.95	\$ 12.95	\$ 2.60	\$ 2.60	\$ 2.60	\$ 2.60	\$ 2.60
	Rolesville	\$ 19.58	\$ 19.58	\$ 19.58	\$ 19.58	\$ 19.58	\$ 7.38	\$ 7.38	\$ 7.38	\$ 7.38	\$ 7.38
	Wake Forest	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Wendell											
Zebulon			\$ 19.25	\$ 19.25	\$ 19.25			\$ 4.16	\$ 3.46	\$ 3.46	
		Yard Waste					Total				
		Fiscal Year					Fiscal Year				
		2015	2016	2017	2018	2019	2015	2016	2017	2018	2019
Municipality	Apex	\$ 4.00	\$ 4.00	\$ 6.85	\$ 6.86	\$ 7.83	\$ 16.33	\$ 16.33	\$ 18.13	\$ 18.42	\$ 19.57
	Cary						\$ 15.00	\$ 16.00	\$ 16.00	\$ 16.00	\$ 17.00
	Fuquay-Varina	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14.25
	Garner	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Holly Springs	\$ 2.00	\$ 2.00	\$ 2.00	\$ 3.00	\$ 3.00	\$ 15.75	\$ 15.75	\$ 16.03	\$ 17.03	\$ 17.03
	Knightdale	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 13.81	\$ 14.83	\$ 14.83
	Morrisville	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Raleigh	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 13.30	\$ 14.05	\$ 14.80	\$ 15.55	\$ 15.55
	Rolesville	\$ 17.04	\$ 17.04	\$ 17.04	\$ 17.04	\$ 17.04	\$ 44.00	\$ 44.00	\$ 44.00	\$ 44.00	\$ 44.00
	Wake Forest	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Wendell						\$ 22.00	\$ 22.00	\$ 22.00	\$ 22.00	\$ 22.00	
Zebulon	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 23.41	\$ 22.71	\$ 22.71	

General Fund Staffing Comparison:

Department	Wendell	Hillsborough	Pittsboro	Rolesville	Zebulon	Selma
Administration	2	7.98	2	2.5	3	4
Finance	4	6	4	3	3	6
Planning	3	4	5	3	5	3
Parks & Rec	6	1.9	0	4	5	8
Safety & RM	0	1	0	0	0	0
IT	1	1	0	0	0	0
Stormwater	0	3	0	0	2	0
Police	20	31.23	14	20	22	25.5
Fire Marshall & EM	0	1.58	0	0	0	0
Public Works	13	11.1	9	5	12	9.5
Econ. Dev.	0	1	0	0	0	0
Library	0	0	0	0	0	3
Cemetery	0	0	0	0	0	2
Fire	0	0	0	0	15	10
Total	49	69.79	34	37.5	67	71

Comparative Community Population, Growth Rate, and Land Area:

	2010 Population	2017 Population	Population Growth Rate	2010 Land Area (sq mi)	2017 Land Area (sq mi)	Land Area Growth Rate
Wendell	5,845	6,843	17%	5.204	5.301	2%
Nearby Comparisons:						
Hillsboro	6,087	7,364	21%	5.33	5.61	5%
Pittsboro	3,743	4,602	23%	4.14	4.40	6%
Rolesville	3,786	6,319	67%	3.93	4.70	19%
Selma	6,073	6,495	7%	4.85	4.93	2%
Zebulon	4,433	4,901	11%	4.14	4.55	10%
Current Comparisons:						
Aberdeen	6,350	7,678	21%	8.51	8.60	1%
Black Mountain	7,848	8,471	8%	6.70	6.73	0%
Fletcher	7,187	8,135	13%	6.41	6.41	0%
Gibsonville	6,410	7,128	11%	3.50	3.51	0%
Woodfin	6,123	6,640	8%	8.79	8.90	1%
5-7 Year Growth Comparisons:						
Archdale	11,415	12,104	6%	8.21	8.60	5%
Knightdale	11,401	14,417	26%	6.21	7.43	20%
Lewisville	12,639	13,231	5%	13.97	14.12	1%
Mebane	11,393	13,363	17%	8.36	9.21	10%
Waxhaw	9,859	13,645	38%	11.54	11.99	4%
10-15 Year Growth Comparisons:						
Clayton	16,116	20,112	25%	13.51	15.07	12%
Clemmons	18,627	19,903	7%	11.81	11.85	0%
Fuquay Varina	17,937	25,548	42%	12.09	14.22	18%
Leland	13,527	18,893	40%	19.78	19.78	0%
Harrisburg	11,526	16,877	46%	9.05	11.28	25%
Kernersville	23,123	25,164	9%	17.32	17.76	3%
Mint Hill	22,722	27,237	20%	23.92	24.17	1%

Parks and Recreation Program Fees:

(Resident / Non-Resident)								
	Baseball	T-Ball	Soccer	Volleyball	Mens' Softball	Mens' Basketball	Co-Ed Softball	Co-Ed Volleyball
Wendell	\$50/\$70	\$25/\$45	3-5yr \$60/\$80 6-9yr \$80/\$100	Spring \$25/\$45 Fall \$50/\$70	\$575/team	\$450/team	\$400/team	\$250/team
Clayton	\$35/\$70	\$25/\$60	\$25/\$60	\$25/\$70	\$500+\$25/non-res. Player	\$450+\$25/non-res. Player	N/A	N/A
Knightdale	\$45/\$60	\$25/\$35	\$88/\$128	\$25/\$60	\$40/pleayer	\$55/player	\$40/player	N/A
Zebulon	\$45/\$65	\$35/\$55	\$45/\$65	N/A	\$450/team	N/A	N/A	N/A
Rolesville	\$53/\$80	\$53/\$80	\$53/\$80	N/A	\$625/team	N/A	N/A	N/A
Wake Forest	\$60/\$100	\$60/\$100	N/A	\$40/\$80	\$550/team	N/A	N/A	N/A



Town of Wendell
Legislative & Administrative Fee Schedule: O-08-2019

Legislative

Filing Fee:

	Mayor	Commissioner
Filing fee for elected office for Town of Wendell Board of Commissioners*	\$25.00	\$25.00

Reference(s):

Town of Wendell Resolution – R-18-77 (6/30/1977); NC GS 163A-1620(e)

*Filing fee is collected by the Wake County Board of Elections when candidate files for placement on ballot as Mayor or Town Board of Commissioner.

Administrative

Check Return Fee:

	Cost
Check Return Fee	\$ 25

NC GS 25-3-506

Town Beer & Wine License:

	Cost
Beer on Premises [NC GS 105-113.77]	\$ 15
Beer off Premises [NC GS 105-113.77]	\$ 5
Wine on Premises [NC GS 105-113.77]	\$ 15
Wine off Premises [NC GS 105-113.77]	\$ 10
Wholesale Dealer – Beer Only [NC GS 105-113.79]	\$ 37.50
Wholesale Dealer – Wine Only [NC GS 105-113.79]	\$ 37.50
Wholesale – Beer and Wine Under Same License [NC GS 105-113.79]	\$ 62.50

Golf Cart Fees:

	Cost
Golf Cart Fees:	
Yearly registration fee	\$100
Transfer of registration to new golf cart replacing an older currently- registered golf cart held by the same owner.	\$ 20
Lost and/or stolen decal fee	\$ 20

Town of Wendell Code of Ordinances; Sec. 24-155

Vehicle License Tax:

	Cost
Vehicle License Tax	\$ 20

Town of Wendell Code of Ordinances; Sec 24-131

Street Closing Fee:

	Cost
Minor Street Closing Application* [Non-refundable and payable upon submission of application]	\$ 15
Cones and/or barricades per event**	\$ 25

Does not apply to Town sponsored or co-sponsored events.

*Does not apply to NCDOT maintained roads

**Must be paid prior to scheduling delivery

Reservation of Board Room:

	Cost
Reservation of Board Room [after 5 p.m.]	\$ 35 per hour

Town of Wendell Code of Ordinances; Sec 2-334; Policy 106



**Town of Wendell
Parks & Recreation Fee Schedule: O-08-2019**

Mission

The Wendell Parks and Recreation Department strives to be a leader in Eastern Wake County by offering high quality recreational, cultural and leisure opportunities that will promote positive development and growth for Wendell citizens and visitors alike. It is our mission to provide open space facilities that will meet the needs of parks and recreation, preserve our natural resources and protect the historical integrity of our community for generations to come.

Wendell Resident is defined as a person who lives within the Wendell Corporate Limits.

Visitor is defined as anyone who resides outside the Wendell Corporate Limits.

Open Space is defined as open land that is undeveloped (has no buildings or other built structures) and is accessible to the public.

Wendell Community Center, 601 West Third Street

Regular Business Hours
7 a.m. to 9 p.m. - Monday through Thursday
7 a.m. to 5 p.m. – Friday

Registration Fees:

Activity	Wendell Resident	Visitor
Youth T-ball/Girls Volleyball	\$25	\$45
Tiny Basketball	\$30	\$30
Youth Athletics	\$50	\$70
Track –Out Camp	\$25 per day \$30 per day	\$25 per day \$30 per day
Adult Church Softball	\$500 per team	\$500 per team
Adult Co-Ed Softball	\$400 per team	\$400 per team
Adult Basketball (25 and older)	\$450 per team	\$450 per team
Adult Co-Ed Volleyball	\$250 per team \$300 per team	\$250 per team \$300 per team
Adult Beach Volleyball	\$100 per team	\$100 per team
Adult Fast Pitch Softball	\$450 per team	\$450 per team
Soccer	\$60 – 3 to 6, \$80 – 7 to 10	\$60 – 3 to 6, \$80 – 7 to 10
Wiffleball	\$25 per person	\$25 per person
Kickball	\$25 per person	\$25 per person
Community Garden	\$15 per person	\$15 per person
Weight Room	\$10 per person	\$10 per person
CPR/First Aid/Babysitting Classes	\$25/\$25/\$35 or \$60 for all 3	\$25/\$25/\$35 or \$60 for all 3

Facility Rental Fees

Athletic Fields (Non-Tournament)

Activity	Cost
Deposit	\$30 and non-refundable
Field Use	\$30 per hour
Parks & Recreation Staff	\$35 per hour
Lining (baseball/softball)	\$50 per event
Lining (soccer)	\$75 per event
Lights (baseball/softball/multi-purpose field)	\$30 per hour
Mowing	\$30 per event
Cross Country / Open Space	\$30 per hour (2 hour minimum)

Athletic Fields (Tournament)

Activity	Cost
Deposit	\$50 and non-refundable
Field Use	\$200 per field per day (includes lights)
Field #3	\$100 per day (no lights)
Disc Golf Course Tournaments	\$100, Monday – Friday (no lights)
Staff	\$250 per day
Field Dry Mix	\$10 per bag

Outdoor Rental

Activity	Cost
Large Shelter - Deposit	\$20 and non-refundable
Large Shelter - Rental	\$20 per hour
Small Shelter - Deposit	\$15 and non-refundable
Small Shelter – Rental	\$15 per hour
Beach Volleyball – Rental	\$10 per hour

Community Center

Activity	Wendell Resident	Wendell Resident – After Hours	Visitor	Visitor – After Hours
Deposit	Equal to one hour Wendell Resident rate			
Conference Room				
Activity Room A	\$15 per hour	\$35 per hour	\$40 per hour	\$60 per hour
Activity Room B	\$25 per hour	\$45 per hour	\$50 per hour	\$70 per hour
Gym (and Stage)	\$65 per hour	\$85 per hour	\$80 per hour	\$100 per hour
Youth Birthday Party (12 years and younger)	\$120 (2 hours)	n/a	\$140 (2 hours)	n/a
Entire Facility – First four hours	\$125 per hour	n/a	\$150 per hour	n/a
Entire Facility – After initial four hours	\$175 per hour	n/a	\$200 per hour	n/a
+Entire Facility – First four hours HOLIDAY RATE	n/a	\$175 per hour	n/a	\$200 per hour
+Entire Facility – After initial four hours HOLIDAY RATE	n/a	\$225 per hour	n/a	\$250 per hour
Entire Facility and Serving Alcohol – 3 p.m. to 12 a.m.	\$2,500* Flat fee includes: parks and recreation staff, police officers, security, insurance, dumpster and clean-up fees.		\$3,000* Flat fee includes: parks and recreation staff, police officers, security, insurance, dumpster and clean-up fees.	
Set-up and/or break down	n/a	\$20 per hour	n/a	\$20 per hour
Dumpster Fee	\$125			
Insurance Fees	\$200; waived if certificate of liability is provided to Parks & Recreation staff.			
Port-o-John Rental	Event coordinator to contact rental facility. Event coordinator to provide information to Parks & Recreation staff.			

+Holidays are defined as those recognized by the Town of Wendell. No event shall be schedule during the recognized Town holidays of Thanksgiving and Christmas.

* Fee schedule is subject to change upon approval by the Wendell Town Board of Commissioners. Actual cost for the use of the entire facility will be based upon the date of the event. If the increased cost is more than the renter is willing to pay, a refund will be made and the reservation cancelled.

Facility Cleaning Rate (Gym and/or Entire Facility)

Number of Participants	Wendell Resident	Visitor
Up to 100 (no alcohol)	\$125	\$125
101 or more persons	\$250	\$250
Event serving alcohol	\$250	\$250

Facility Staffing

Expected Participants	Less than 250	250-500
No Alcohol	1 P&R supervisor	1 police officer & 2 P&R supervisors
~With Alcohol	1 police officer & 1 P&R supervisor	2 police officers & 2 P&R supervisors

~Code of Ordinance Section 14-21; Parks and Recreation Policies and Procedures

Downtown Wendell, Ashley Square, and/or Woman’s Club

Space for special event request is reserved upon receipt of non-refundable special event fee. The full balance must be paid and all permits turned in 30 days prior to the event.

Fee Description	Wendell Resident	Visitor
J. Ashley Wall Town Square – Deposit	\$75 and non-refundable	
J. Ashley Wall Town Square – Rental	\$75 (first 4 hours)	
J. Ashley Wall Town Square – After initial four hours	\$25 per hour for each hour after initial four hours	
J. Ashley Wall Town Square - Water Fee	\$20	
J. Ashley Wall Town Square – Electric Fee	\$20	
*Temporary sign permit fees for up to 6 signs	\$10; Issued by Wendell Planning Department	
*Wake County Building Permit	Determined by Wake County Inspections	
*Insurance Fees	Determined by Individual Carrier	
*Port-o-John Rental	Event coordinator to contact rental facility. Event coordinator to provide information to Parks & Recreation staff.	

*Event coordinator will need to contact the Town, County, or business that provides service.

Special Events Staffing

The Town of Wendell will determine the minimum staffing levels for each event.

Staffing Fees	
Parks & Recreation staff	\$35 per hour
Police officer / Security	\$35 per hour
Public Works staff	\$35 per hour



Town of Wendell
Planning / Development Fee Schedule: O-08-2019



Effective July 1, 2019: All fees are to be remitted prior to processing and/or action being taken by the Town on behalf of the applicant. Fee schedule is subject to change upon approval by the Wendell Town Board of Commissioners.

Building Permit and Inspections Fee Schedule is subject to change based on fees established by the Wake County Board of Commissioners.

Development Infrastructure Fee Schedule is subject to change based on fees set by the City of Raleigh and Duke Energy.

Development Infrastructure Submittal Fees

Duke Energy Underground Service Charge	
<i>See separate Duke Energy Fee Schedule available in the Wendell Planning Dept.</i>	

Wireless Communication Fees	
Collocations/Modifications	\$1,000 plus 3 rd party fee
New Structure	\$2,500 plus 3 rd party fee
Project Requiring Special Use (plus 3 rd party fee)	\$2,500 plus 3 rd party fee and Special Use fee

Residential Solid Waste and Recycling	
Solid Waste Fees* (<i>Chapter 18, Town Code of Ordinances</i>)	\$22 per month *Shown on Raleigh Utility Bill

City of Raleigh	
Residential: Water, Sewer and Other System Fees	
<i>See separate City of Raleigh Fee Schedule available in the Wendell Planning Dept.</i>	
Commercial:	
<i>See separate City of Raleigh Fee Schedule available in the Wendell Planning Dept.</i>	

Development Submittal Fees

Residential Building Permit Processing	
New Dwelling/Addition/Renovation	\$100
Detached Garage/Secondary Dwelling/Pool	\$100
Unheated Storage Building/Unenclosed Deck/Stairs/Ramp	\$0
Commercial Building Permit Processing:	
New Structure/Addition/Renovation	\$100
Administration - Other	
Demolition Permit Processing Fee	\$25
Trade Permit Processing Fee	\$20
Contractor Change Form Fee	\$60 or up to max of \$180 per occurrence
Zoning Compliance Permits	
Residential Compliance	\$25
Accessory Structure / Deck	\$25
Residential New Structure	\$100
Multi-Family New Structure	\$100
Commercial Zoning Compliance Only	\$50
Commercial Addition or Renovation	\$50
Commercial New Structure	\$250
Signage	
Window / Sign Face Replace	No Charge
Wall Awning Sign	\$ 30
Monument Sign	\$ 50
Two or more of any type	\$ 60
Temporary Signs (for profit only)	\$ 20
Zoning Related Hearing Items	
Annexation	\$350
Zoning Text Amendment	\$550
Special Use Request Application	\$550
Variance Application	\$550
Zoning Map Amendment / Conditional District Request	\$550
Rezoning Application	\$550
Appeal of Zoning Administrator or Board of Adjustment	\$300
Plan Review	
Sketch Plan	\$150
Preliminary Plat – Minor Subdivision / Recombination:	\$150
Preliminary Plat – Major Subdivision / Master Plan	\$400 (plus \$5/lot)
Commercial Site Plan / Preliminary Plat	\$400
Final Plat – Major Subdivision	\$200 (plus \$5/lot)
Re-submittal fees – (beginning with 3 rd submittal)	½ original submittal fee

Cemetery	
In-Town Applicant	\$1,200
Out-of-Town Applicant	\$2,400
Monument Deposit*	\$600 *refundable fee
Printed Maps / Document	
Comprehensive Master Plan – 8.5 x 11 size (B & W)	\$20 (bound)
Unified Development Ordinance – 8.5 x 11 size (B & W)	\$60 (bound)
Zoning Map or Future Development Map – 24 x 36 size (color)	\$25
Printed Customized Map – 24 x 36 size	\$25 (+ additional customization administrative fee)
Printed Customized Map/Document – 36 x 48 size or larger	\$30 (+ additional customization administrative fee)
Other Documents and Plans (3-ring)	\$ 40
Printing 8.5 x 11 (B & W)	\$0.20 per page (Min. 3 copies)
Printing 8.5 x 11 (color)	\$0.40 per page (Min. 3 copies)
Printing 11 x 17 (B & W)	\$0.50 per page (Min. 2 copies)
Printing 11 x 17 (color)	\$1 per page (Min. 2 copies)
Miscellaneous Fees	
Zoning Penalty/Working Without A Permit	\$100 per day
Engineering Fees (<i>Prepaid at time of application submittal</i>)	\$1,000
Development Agreement (new or amendment)	\$400
Water/Sewer Capacity Reservation Fee	Paid for when/if vested rights are extended
Solid Waste Fees*	\$22 per month *Shown on Raleigh Utility Bill
Sidewalk and/or Driveway Inspection <i>[A re-inspection fee is charged for each extra trip (beyond 2 total trips for sidewalks and/or Driveways combined) necessary to approve a required inspection. Must be paid prior to scheduling a re-inspection.]</i>	<ul style="list-style-type: none"> • Initial and first re-inspection – \$60 • Second and subsequent re-inspections - \$60 each
Storm Drainage Inspection – If performed by Town Charged to the developer <i>[A re-inspection fee is charged for each extra trip necessary to approve a required inspection. Must be paid prior to scheduling a re-inspection.]</i>	<ul style="list-style-type: none"> • \$1 per linear foot. • Re-inspections shall be charged \$1 per linear foot for the affected area.

Town of Wendell	
Fee in Lieu of Installation	
Sidewalk Fee in Lieu	\$25 per linear foot
Open Space Fee in Lieu for Multi-family (excluding Townhome)	\$2500 per unit
All other Fee in Lieu requests must submit cost estimates of required improvements for review.	

Duly adopted this _____ day of _____, while in regular session.

ATTEST:

Virginia R. Gray,
Mayor

Sherry L. Scoggins, MMC
Town Clerk

James P. Cauley III
Town Attorney

Outside Agency Service Partners

As a small town with big charm, the Town of Wendell seeks to provide a high quality of life for its residents and customers. As a growing community, new residents may be familiar with services being provided by the Town or other agencies. To assist direct residents to the appropriate agency responsible for a municipal service in Wendell, the following list of partner agencies and services is provided.

- Ambulance and Paramedic Services – Eastern Wake EMS, Inc. contracts with Wake County to provide paramedic level 911 service response for the Towns of Knightdale, Wendell, Rolesville, and Zebulon and surrounding areas.
- Animal Control – Wake County Animal control provides services for domestic animal issues.
- Building Code Inspections – Inspections and permitting for Building Code compliance is administered by Wake County Inspections.
- Elections – Wake County Board of Elections oversees the municipal and special elections in Wendell, as well as County, State, and Federal elections.
- Fire Inspections – Wake County Fire Inspections provide inspections, permitting, and enforcement for the North Carolina Fire Code.
- Fire Protection – The Wendell Fire Department is a non-profit that contracts with Wake County to provide fire service protection within the Town of Wendell and the surrounding Wendell-Holmes Fire District.
- Public Schools – Public education for grades K-12 is provided by the Wake County Public School System.
- Solid Waste – Residential waste disposal and recycling services are provided by Waste Industries through a contract with the Town and billed on the City of Raleigh Utility Bill.
- Stormwater Services – Wake County Environment Services provide stormwater program assistance with permitting and inspections.
- Tax Collection and Appraisal – Wake County Revenue provides tax appraisal and collection services for the Town of Wendell.
- Vital Records – Records for persons born, married, or died in Wendell or Wake County may be accessed at the Wake County Register of Deeds.
- Water and Sewer – The City of Raleigh Utilities Department provide water and sewer service to the Town, Extra Territorial Jurisdiction (ETJ), and Urban Services Area.

Glossary of Terms and Acronyms

The following glossary of terms and acronyms is provided to inform and assist the reader with the language used in the budget.

- ADA – Americans with Disabilities Act, as amended.
- AICP – American Institute of Certified Planners is the American Planning Association verification of qualification for planners.
- Allocate – To set apart portions of budgeted expenditures that are specifically designated for special activities or purposes.
- Appropriation – A legal authorization by the Board of Commissioners to incur obligations and make expenditures for specific purposes.
- APWA – American Public Works Association.
- Balanced Budget – Expenditures equal revenues. NC state statute requires local governments to adopt a balanced budget.
- Bond – A written promise to repay a specific amount of money with interest within a specific time period, usually long-term.
- Budget – A proposed plan for raising and spending money for specified programs, functions, activities or objectives during a fiscal year.
- Budget Ordinance – The ordinance that levies taxes and appropriates revenues for specific purposes, functions, activities or objectives during a fiscal year.
- Budget Year – The fiscal year for which a budget is proposed, or a budget ordinance is adopted extending from July 1 to June 30.
- Budgetary Control – The control or management of a governmental unit in accordance with an approved budget for the purpose of keeping expenditures within the limitations of available appropriations and available revenues.
- CAFR – Comprehensive Annual Financial Report is a set of governmental financial reports, including the annual audit reports, meeting the requirements of the Governmental Accounting Standards Board (GASB).
- CALEA – Commission on Accreditation for Law Enforcement Agencies is a credentialing authority for law enforcement agencies.
- Capital Improvement Program (CIP) – A strategic plan for capital expenditures to be incurred over a fixed period of five future years, summarizing estimated project costs and sources of financing.

- Capital Assets – Assets of long-term character which are intended to continue to be held or used by the Town, including land, buildings, machinery, furniture and other equipment.
- Capital Outlay – An expenditure for the acquisition of or addition to fixed assets tracked by departments with an expected useful life of more than one year.
- Capital Project – An undertaking involving construction, purchase, or major renovation of a building, utility system, or other structure and equipment having a useful life of at least 15 years and an estimated cost of at least \$10,000.
- Contingency – An appropriation controlled by the Board of Commissioners intended for emergencies and unforeseen circumstances not otherwise budgeted.
- Debt Service – The sum of money required to pay installments of principal and interest on bonds, notes, and other evidences of debt accruing within a fiscal year.
- Department – An organizational unit of the Town responsible for carrying out a major governmental function.
- Division – A sub-unit of a department that has responsibility for a specific function within the department.
- Enterprise Fund – A fund that accounts for governmental activities supported wholly or in part with user fees or charges and is operated using business principals. Examples include the Water and Sewer Funds.
- Expenditure – The spending of money by the Town for programs or projects included within the approved budget.
- FICA – Federal Insurance Contributions Act is a payroll contribution made by both employees and employers to fund the federal programs of Social Security and Medicare.
- Fiscal Year (FY) – A twelve-month period of time to which the annual operating budget applies and at the end of which the financial position and results of operation are determined (July 1 through June 30).
- FTE – Full time equivalent is used in staffing to indicate the number of permanent full-time and part-time positions in a department or organization.
- Fund – A fiscal and accounting entity with a self-balancing set of accounts recording cash and other resources, together with all liabilities or balances, for the purpose of carrying on specific activities or attaining certain objectives.
- Fund Balance – The difference between the assets and liabilities of a fund.
- Fund Balance Appropriated – A budgetary amount representing the fund's equity to be used to offset expenditures.

- Fund Balance Available – The amount of fund balance determined at the end of the preceding fiscal year that is available for appropriation and expenditure in the current year.
- GAAP – Generally Accepted Accounting Principles.
- GASB - Governmental Accounting Standards Board.
- General Fund – The General Fund accounts for the financial resources of the government. General Fund revenues include property taxes, licenses and permits, local taxes, and other types of revenue. The fund includes police protection, finance, administration, information technology, planning, parks and recreation, and public works.
- GFOA – Government Finance Officers Association.
- Grant – A contribution or gift in cash or other assets from another government or non-profit to be used for a specific purpose.
- ICMA – International City/County Manager’s Association
- Internal Service Funds – Funds used to account for the financing of goods or services by one Town department to other Town departments on a cost reimbursement basis.
- NCDOT – North Carolina Department of Transportation.
- OPEB – Other Post-Employment Benefits.
- PEG – A non-profit organization that provides video content to local government access channels including East Wake Television, Channel 22, that serves Wendell.
- Personnel Services – Expenditures related to the compensation of employees, including full-time and part-time salaried, overtime, FICA, and retirement benefits.
- Proprietary Funds – Funds used to separate, control, and track financial resources of business-type activities carried out by a government. The two proprietary fund types include enterprise funds and internal service funds.
- Recovered costs – Expenditures incurred by one Town department or division and recovered by way of charging them to the Town department or division causing the expenditures.
- RFP – Request for Proposals is a means to procure services from potential vendors.
- Revaluation – Assignment of value to properties, buildings, vehicles, and equipment used for business and residential purposes by the Wake County Revenue Office. State law requires all property to be revalued no less frequently that once every eight (8) years.
- Revenue – Income received or anticipated by a local government from either tax or non-tax sources.

- ROW – Right-of-way is the public easement area for the placement of a road.
- Special Revenue Fund – Fund used to account for the proceeds of special revenue sources (other than special assessments, expendable trusts, or major capital projects) that are legally restricted to expenditure for specified purposes.
- TJCOG – Triangle J Council of Governments is a regional government that provides services to a seven-county region, including Wake County.
- Transfer – An amount distributed from one fund to finance activities in another fund.
- UDO – Unified Development Ordinance guides development and land use.
- User Fees – Category of revenue that includes fees charged primarily for the delivery or use of a public service.