



## **Town Council Retreat Day Two**

**February 13, 2025 | 8:30 AM – 5:00 PM**  
**Apex Town Hall | 73 Hunter Street, Apex, NC**  
**3<sup>rd</sup> Floor Training Rooms A and B**

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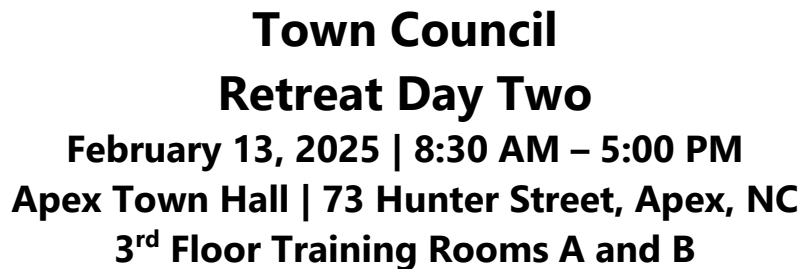
- |  |                 |
|--|-----------------|
| <b>I. Breakfast / Agenda Review</b><br><i>Open Discussion / Mayor Jacques K. Gilbert</i>   | <b>8:30 AM</b>  |
| <b>II. Financial Condition Review</b><br><i>Antwan Morrison, Director<br/>Finance Department</i>   | <b>8:30 AM</b>  |
| <b>III. Financial Advisor Update, including Debt<br/>Modeling and Policy Recommendations</b><br><i>Andrew Carter and Douglas Carter<br/>DEC Associates, Inc.</i> | <b>9:00 AM</b>  |
| <b>IV. Break – 15 minutes</b>  | <b>10:30 AM</b> |
| <b>V. Town Facilities Study and Recommendations</b><br><i>Daniel Edwards, Senior Capital Projects Manager<br/>Town Manager's Office</i>                          | <b>10:45 AM</b> |
| <b>VI. Lunch – 45 minutes</b>  | <b>11:45 AM</b> |
| <b>VII. Public Engagement – Budget Prioritization<br/>Survey Results</b><br><i>Amanda Grogan, Director</i>   | <b>12:30 PM</b> |

### **ANNOUNCEMENTS**

Members of the public can access and view the meeting on the Town's YouTube Channel <https://www.youtube.com/c/TownofApexGov> or attend in-person.

**Accommodation Statement:** Anyone needing special accommodations to attend this meeting and/or if this information is needed in an alternative format, please contact the Town Clerk's Office. The Town Clerk is located at 73 Hunter Street in Apex Town Hall on the 2nd Floor, (email) [allen.coleman@apexnc.org](mailto:allen.coleman@apexnc.org) or (phone) 919-249-1260.





<b>VIII. Capital Projects Prioritization Results</b>	<b>1:15 PM</b>
<i>Amanda Grogan, Director</i> <i>Budget and Performance Management Department</i> <i>Other staff as applicable</i>	
<b>IX. Break – 10 Minutes</b>	<b>2:30 PM</b>
<b>X. Parks Capital Project Prioritization Discussion</b>	<b>2:40 pm</b>
<i>Angela Reincke, Parks Project Manager</i> <i>Parks, Recreation, and Cultural Resources Department</i>	
<b>XI. Team Building – Check-in</b>	<b>3:45 pm</b>
<i>Dr. Ruth Steidinger, Founder and</i> <i>Chief Executive Officer of Steidinger Consulting</i>	
<b>XII. Future Work Session Topics</b>	<b>4:30 pm</b>
<i>Randy Vosburg, Town Manager, and</i> <i>Allen Coleman, Town Clerk</i>	
<b>XIII. Wrap-up and Adjournment</b>	<b>4:35 pm</b>
<i>Mayor Jacques K. Gilbert</i>	

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February 13, 2025

## Mid-Year Financial Review

Antwan Morrison | Finance Director






## **Purpose:**

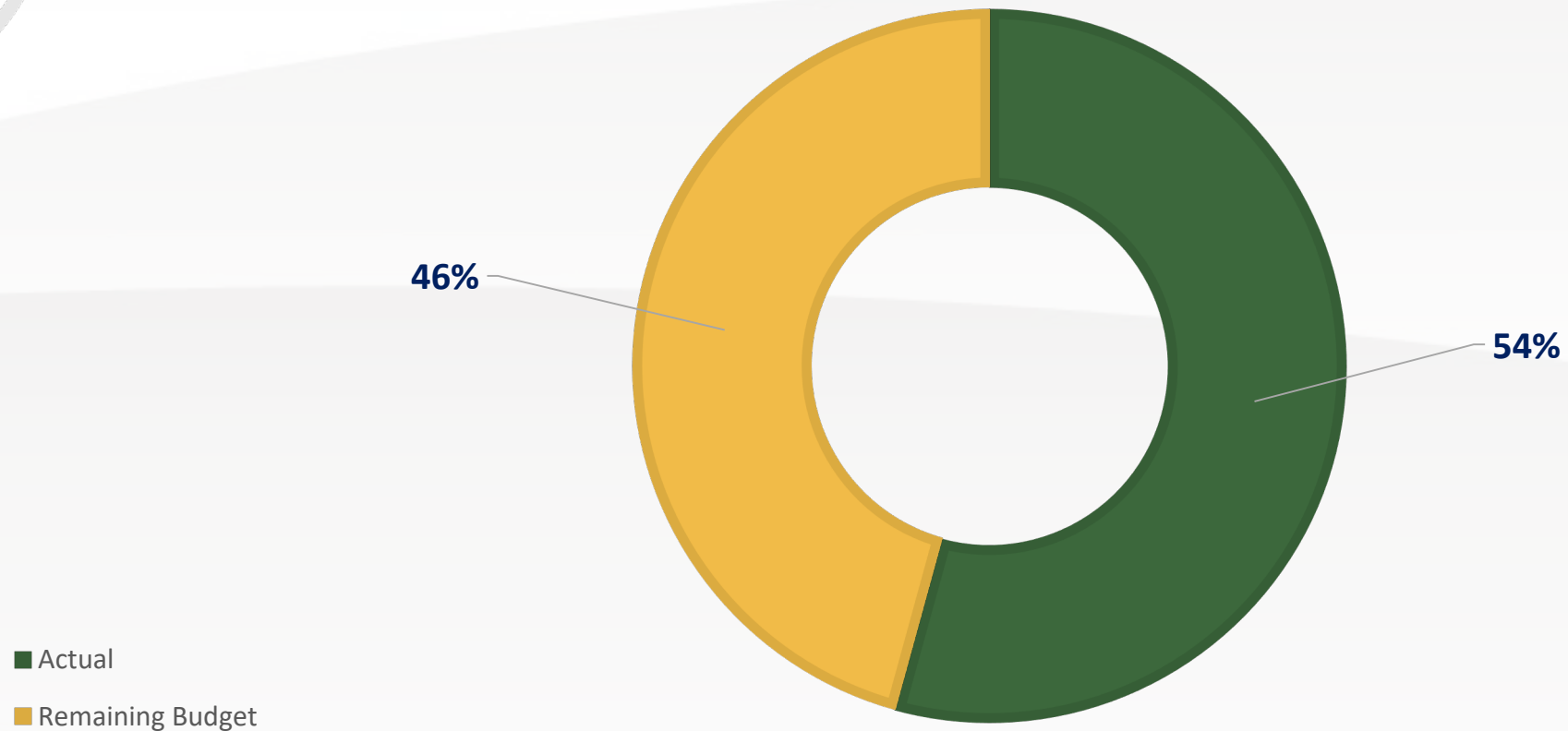
- Provide a financial overview for the first six months of the new fiscal year (July 2024 through June 2025).
- Reporting date is December 31, 2024

## **Requested Action:**

- No action needed
  - Informational only
- 



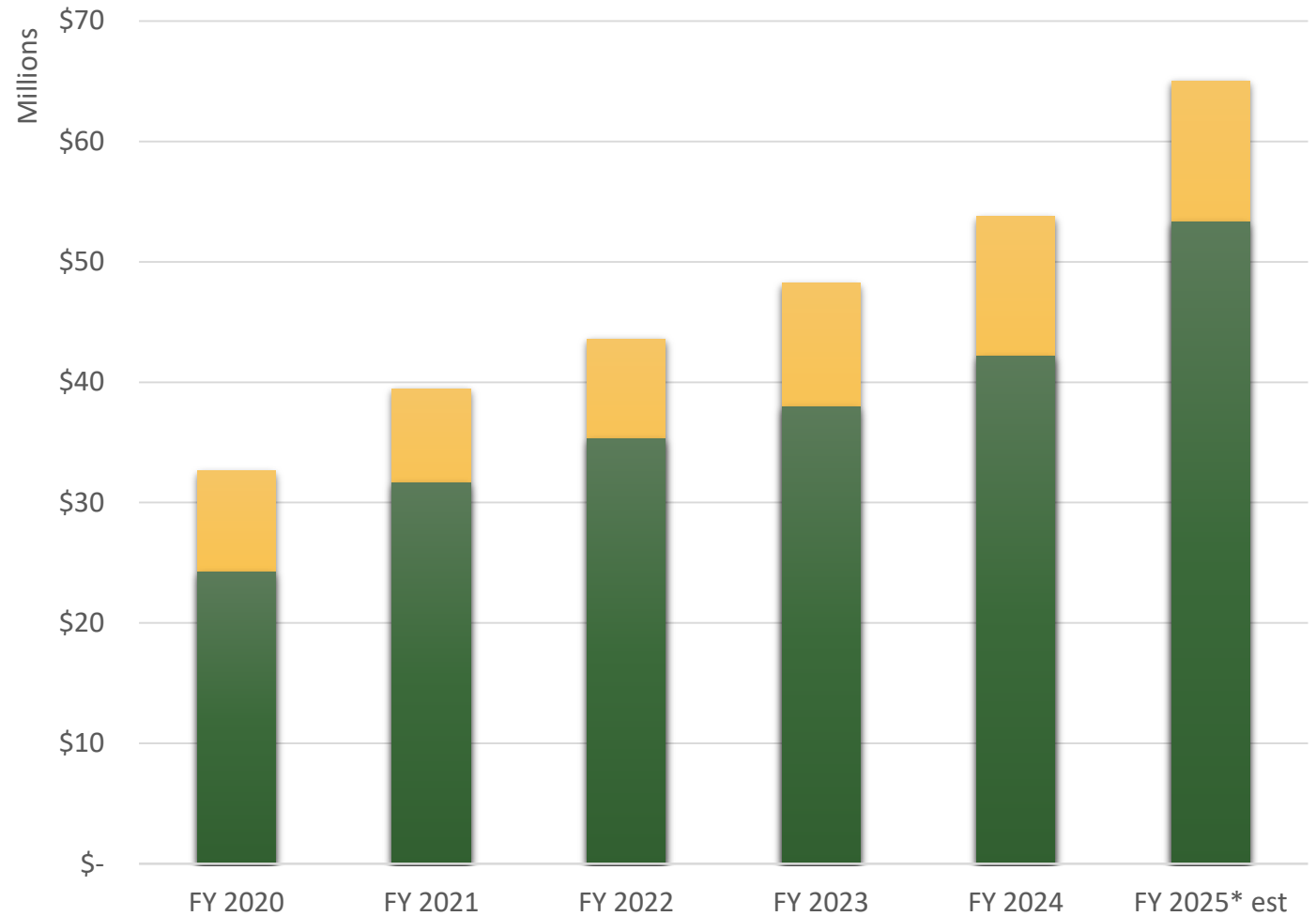
# GENERAL GOVERNMENT REVENUES



NOTE: Consolidated General Fund, Affordable Housing Fund and Debt Service Fund for reporting purposes



# AD VALOREM TAXES

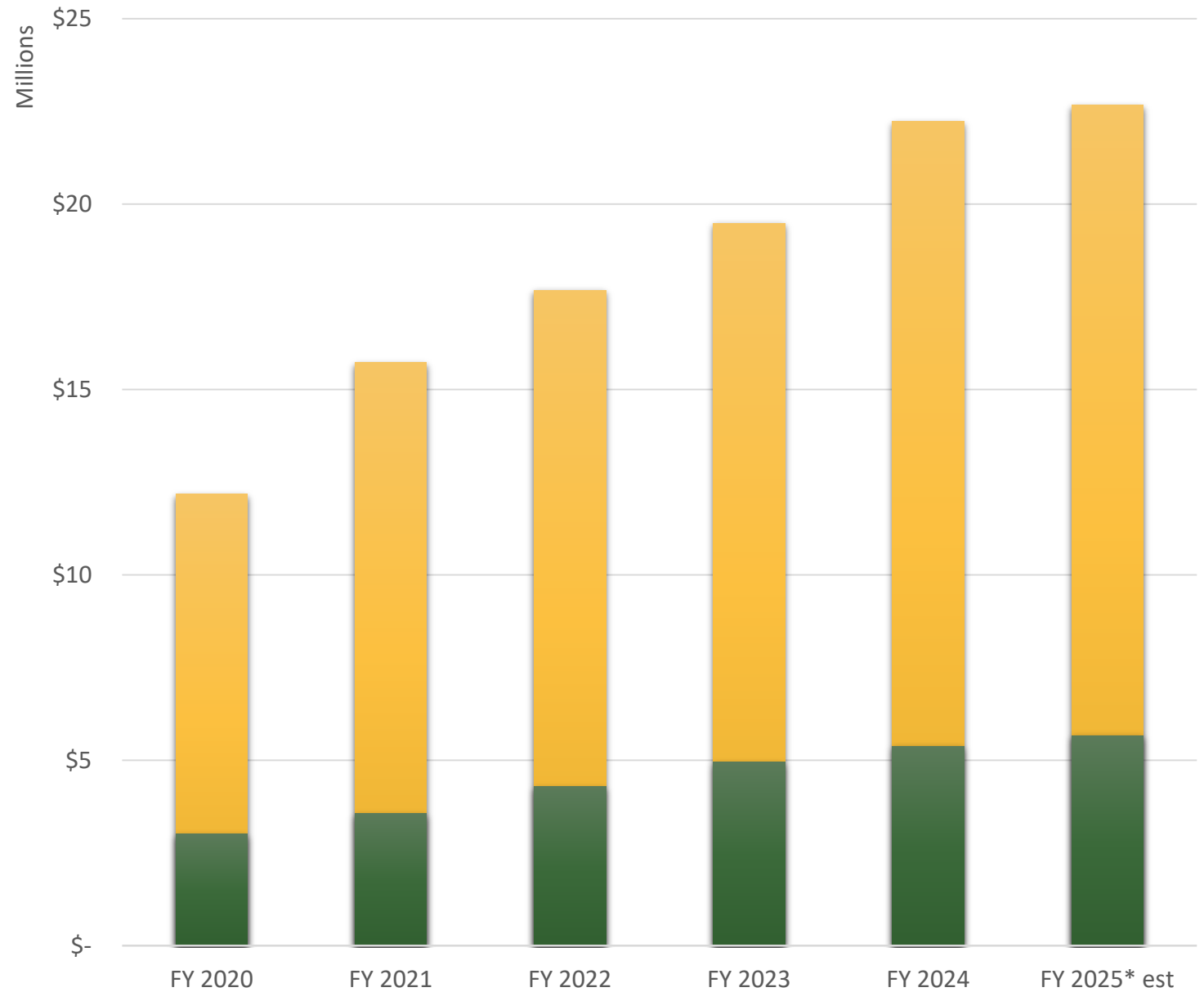


□ \*Last revaluation

□ Note: FY 2023 included \$.015 transportation bond

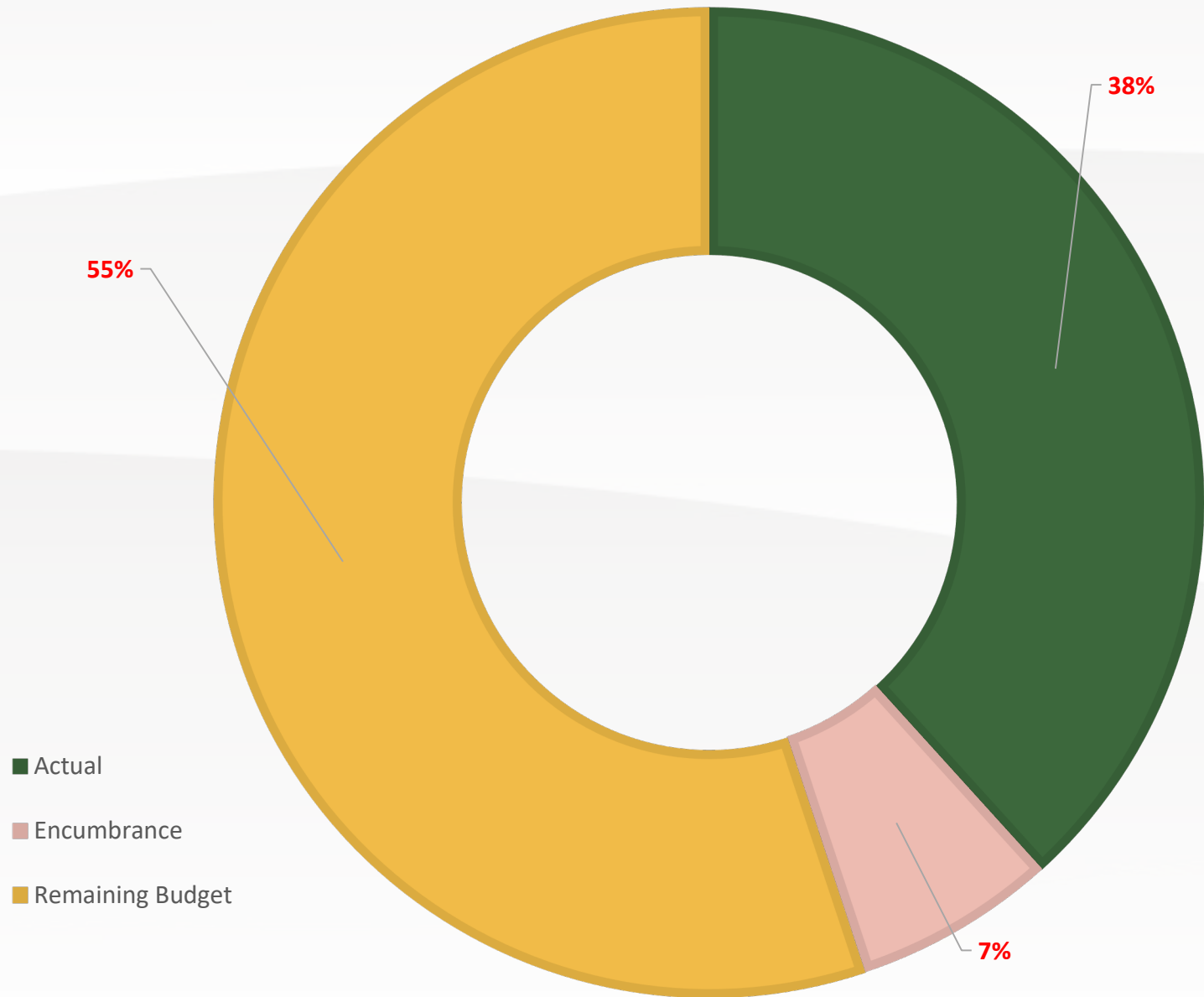


# SALES TAXES





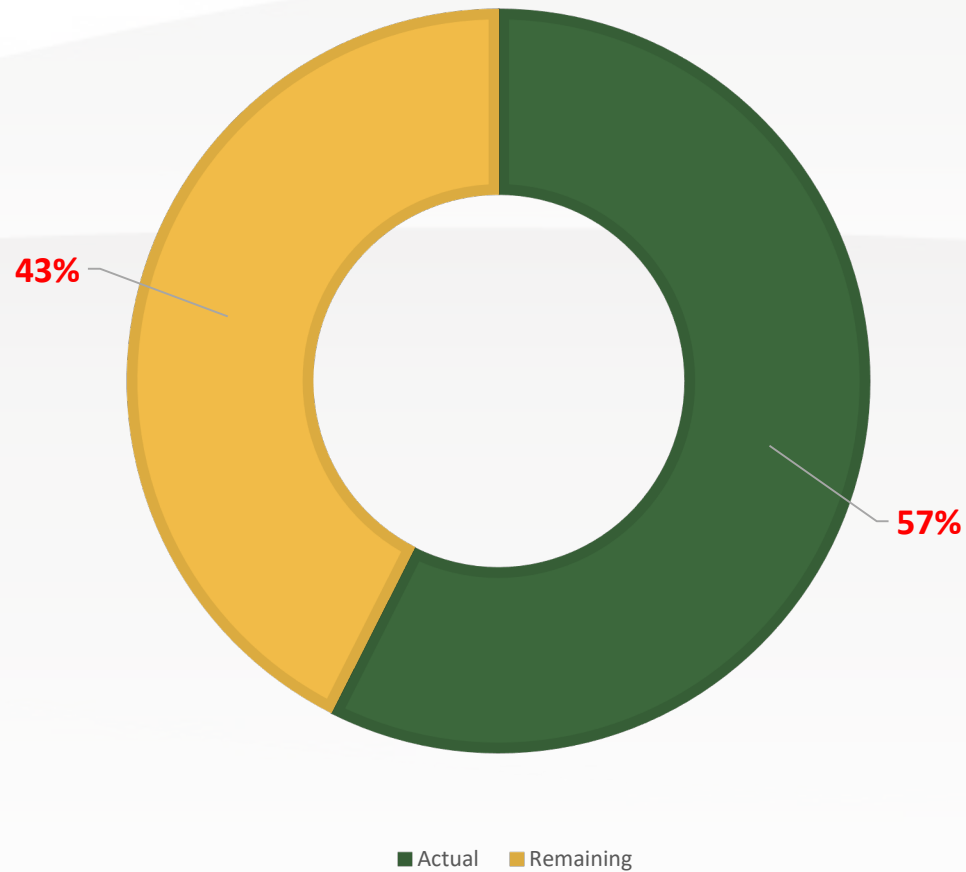
# GENERAL GOVERNMENT EXPENDITURES



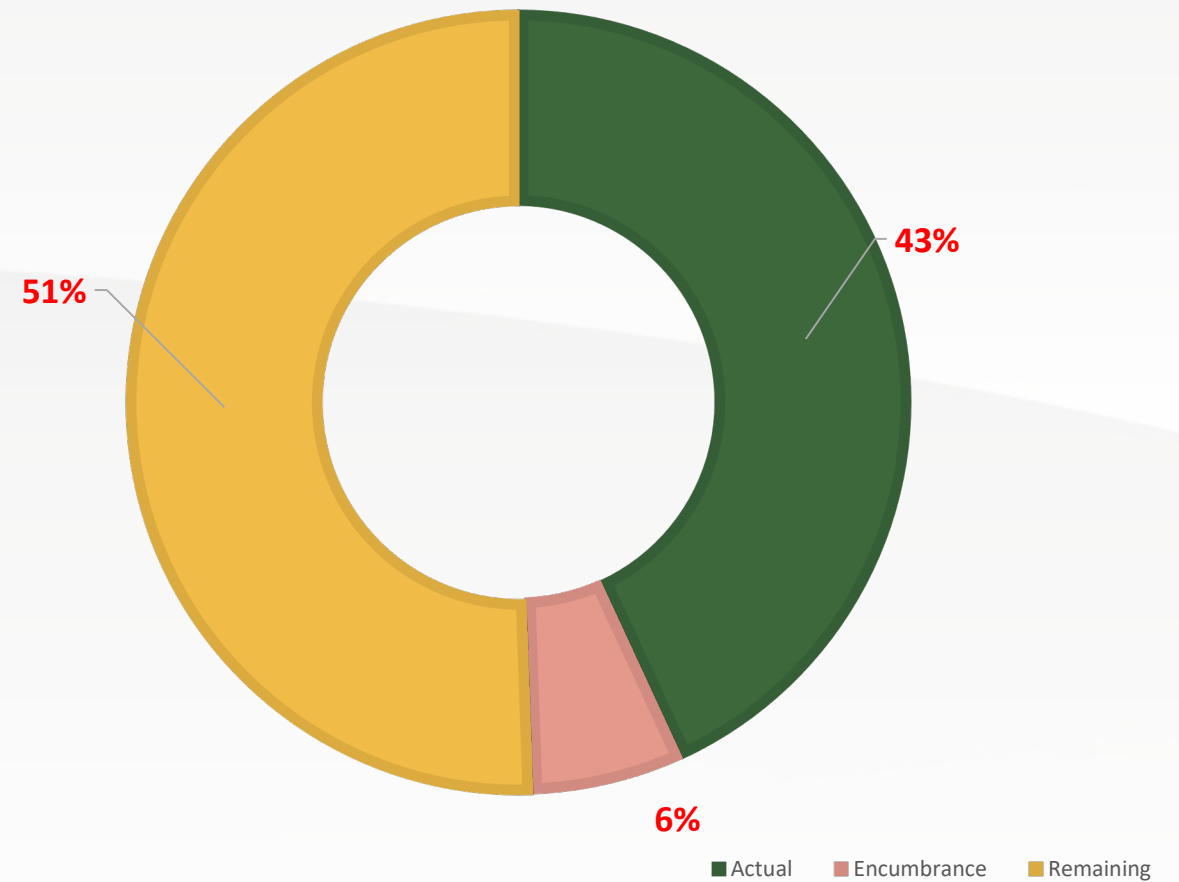


# WATER AND WASTEWATER FUND

REVENUES



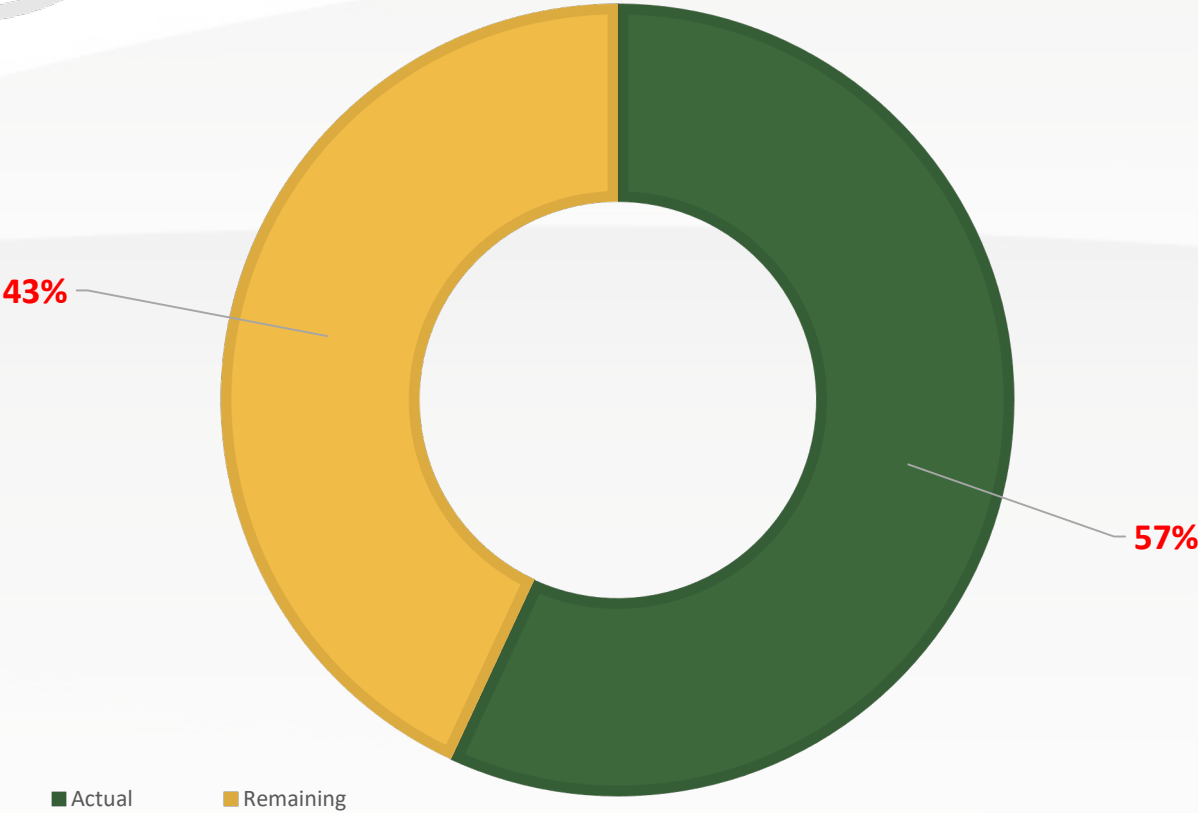
EXPENSES



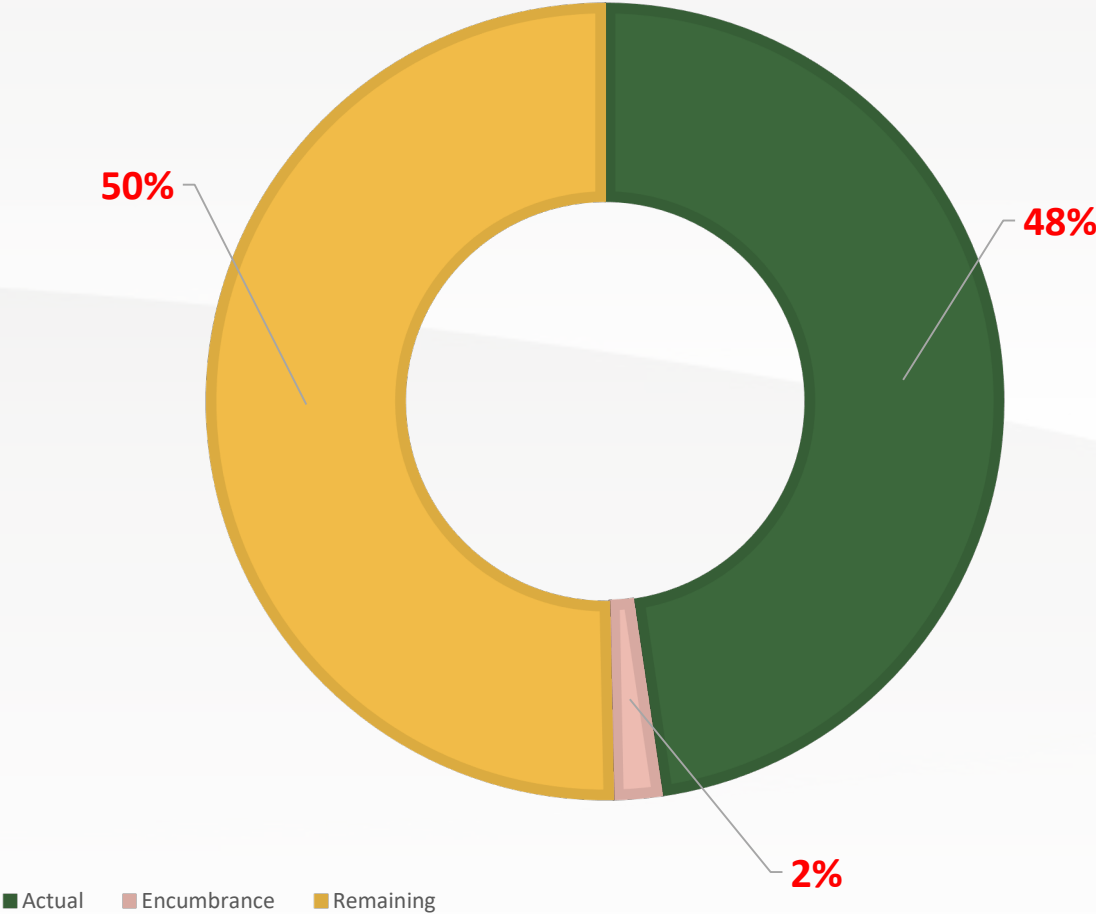


# ELECTRIC FUND

REVENUES



EXPENSES



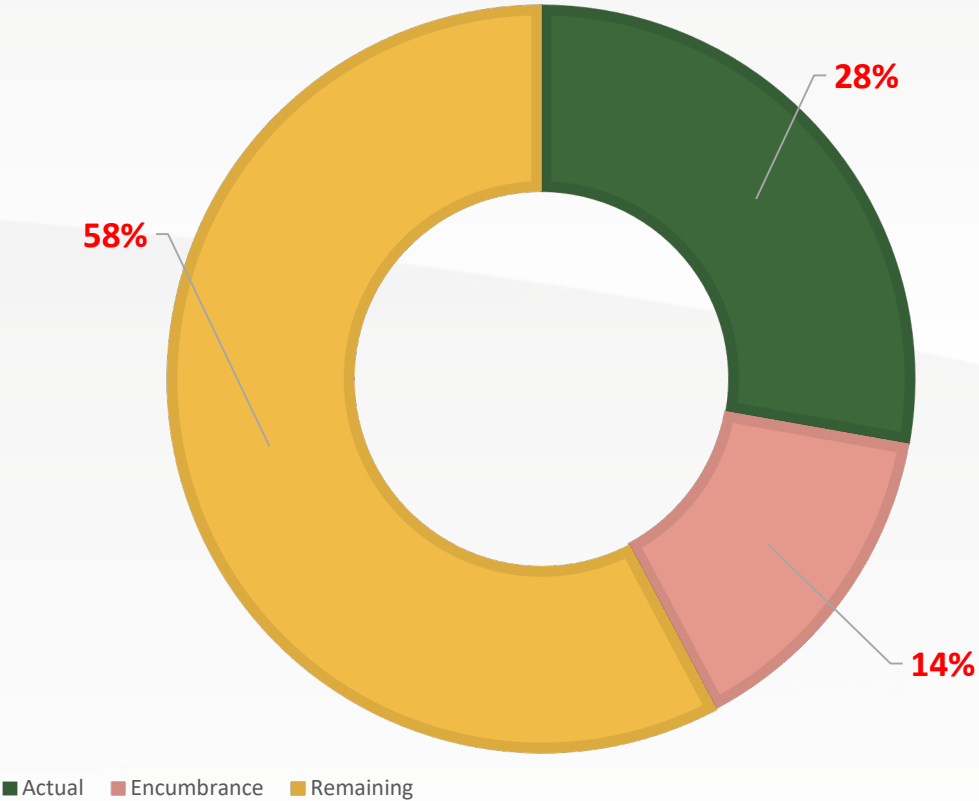
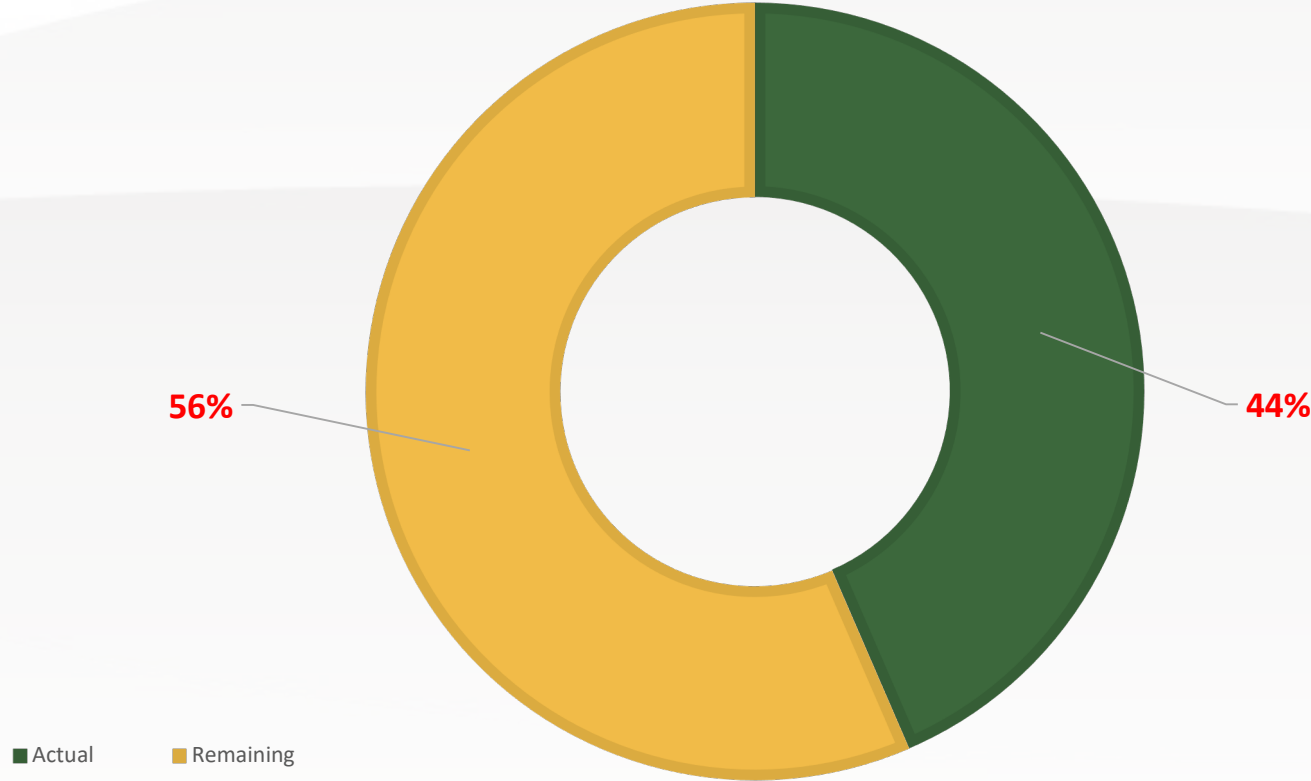




# STORMWATER FUND

REVENUES

EXPENSES





## Fund Balance / Fund Equity - Snapshot

Fund	Revenues over Expenses	Fund Balance/Equity Balance	Cash Balances	Days Cash On Hand	Estimated Excess Available Cash On Hand
General Fund*	\$ 21,040,229	\$ 81,793,178	\$ 80,265,389	N/A	N/A
Water and Wastewater Fund	1,055,162	315,569,584	47,828,694	642	\$ 32,929,192
Electric Fund	5,633,060	73,808,589	8,482,883	58	(4,689,405)
Stormwater Fund	534,659	2,995,609	5,292,694	929	4,677,514
Affordable Housing Fund	1,177,260	6,588,723	4,924,923	N/A	N/A

\*General Fund and Debt Service Fund – consolidated for reporting





## Capital Reserves at December 31, 2024

Fund	Amount
Cemetery Fund	\$ 54,827
Recreation Capital Reserve Fund	6,170,523
System Development Fee Fund	23,456,565
Transportation Capital Reserve Fund	3,318,614





# Debt Update

- Total Debt Budget: \$15.3 million
  - General Government - \$10.8 million
  - Enterprise Funds - \$4.5 million
- Expended To Date: \$3.3 million
  - General Governmental: \$2.5 million
  - Enterprise Fund: \$789 thousand
- Planned Issuances:
  - Limited Obligation Bonds (LOBs) - \$25 to \$30M – Summer 2025
  - General Obligation Bonds (GOs) - \$24.5M – Summer/Fall 2026
  - Revenue Bonds:
    - Electric - TBD – approved bond resolution for up to \$15M
    - Water and Wastewater - TBD – approved bond resolution for up to \$50M



# General Obligation Bond Authorization - 2021

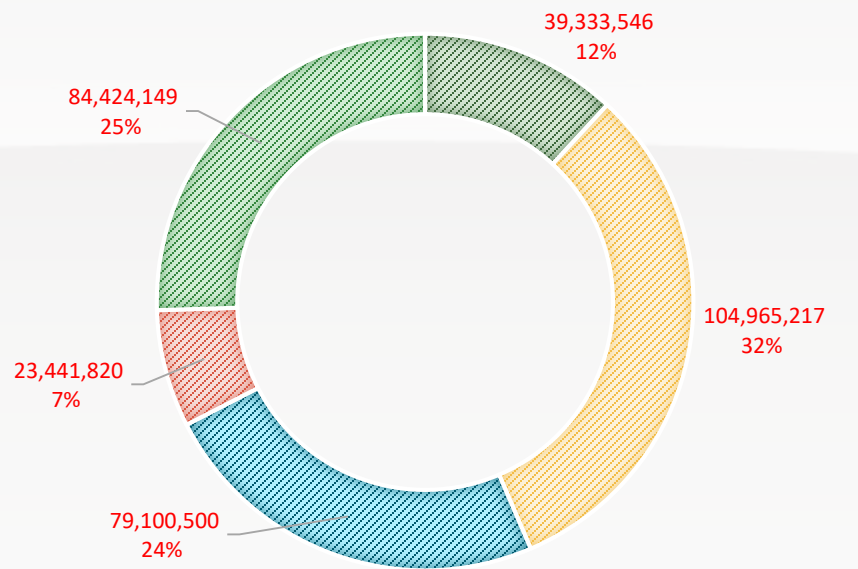
## Transportation

	Authorized	Issued	Authorized but Not Issued	Bond Premium	Interest Earned
Pavement Improvements	\$ 5,000,000	\$ 1,000,000	\$ 4,000,000	\$ 55,592	\$ 65,643
Peakway SW Connector	14,650,000	15,500,000	(850,000)	1,250,813	1,383,056
Apex Peakway N Widening	5,400,000	-	5,400,000	-	-
Center Street RR Crossing & Sidewalk	800,000	-	800,000	-	-
Chatham Street RR Crossing & Sidewalk	1,300,000	-	1,300,000	-	-
West Williams Street Sidewalk	850,000	-	850,000	-	-
Jessie Drive	8,000,000	-	8,000,000	-	-
Safe Routes to Schools	6,000,000	1,000,000	5,000,000	55,592	46,884
	<u>\$ 42,000,000</u>	<u>\$ 17,500,000</u>	<u>\$ 24,500,000</u>	<u>\$ 1,361,997</u>	<u>\$ 1,495,583</u>

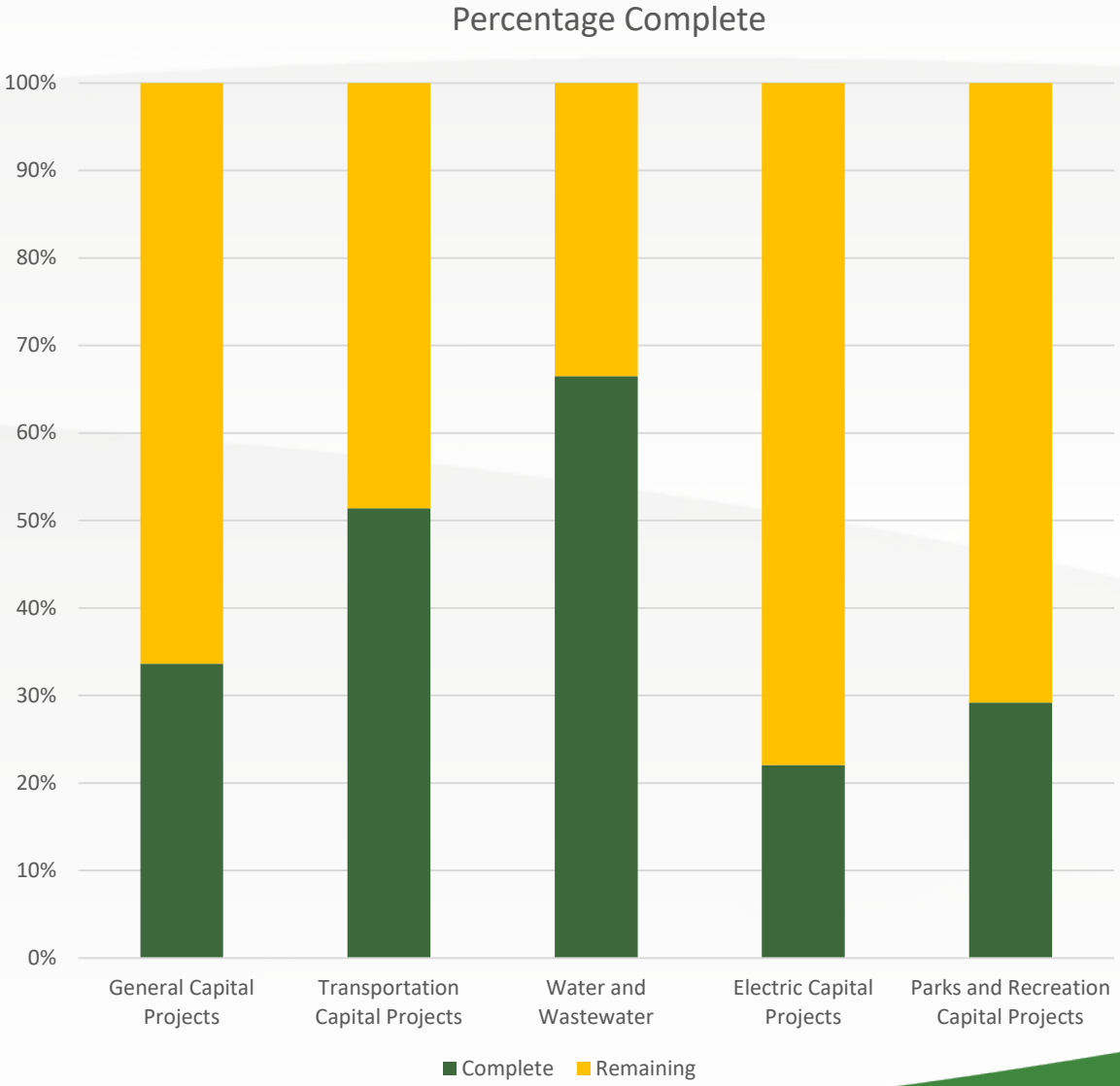


# Active Capital Projects

TOTAL CAPITAL PROJECTS BUDGET -  
\$331.3M



- General Capital Projects
- Transportation Capital Projects
- Water and Wastewater
- Electric Capital Projects
- Parks and Recreation Capital Projects











# Financial Policies & Debt Model Update

February 13, 2025



# General Government Capital Model Update

- ▶ Apex has sound finances and financial planning - moving to a “Next Level” of planning
- ▶ DEC updated Council on October 25, 2024 - describing a multi-phase approach to the plan & need to start recommending updates to policies
- ▶ DEC updated Finance Committee on January 17, 2025 to discuss policy updates and provide guidance on revenue assumptions
- ▶ Elements to be updated in plan
  - ▶ Debt and other financial policies
  - ▶ Expansion of the General Government Debt Affordability Model to include Pay-go
  - ▶ Creating a “Steady State” debt creation approach
  - ▶ Other elements
- ▶ Today we are giving an update to policies with emphasis on General Government Plans



# Current Policies

- ▶ Current financial and debt policies
  - ▶ General Fund
    - ▶ Debt policies
      - ▶ Net Debt as a percentage of total assessed value should not exceed 2.5%
      - ▶ Debt Service as a percentage of total governmental fund expenditures should not exceed 12%
      - ▶ 10-yr principal payout ratio target of 55% or better
    - ▶ Reserve policies
      - ▶ “Available” fund balance at least 25% of annual operating budget
        - ▶ If drops below this level, Town has 36 months to restore



# Policy Considerations – Finance Committee

- ▶ Recommended updates or additions
  - ▶ General Fund (and CIF fund)
    - ▶ Debt policy
      - ▶ Add end of fiscal year CIF fund fund balance coverage ratio policy – 50% or better
        - ▶ Defined as CIF fund fund balance divided by debt service - risk tolerance level
    - ▶ Reserve policy
      - ▶ Adjust percentage of “available” fund balance to a range – 20 to 25%
        - ▶ Add policy on excess funds in “available” fund balance over 30% is to be transferred into the CIF Fund after completion of annual ACFR (audited annual financial report)
  - ▶ CIF funding recommendation – dedicated tax rate funding
    - ▶ 5.54¢ of tax rate annually
    - ▶ As valuation grows, so does revenue to CIF fund – allows additional capacity



# Current Issuance Plan

► Planned new General Government investments:

2025 Limited Obligation Bonds

Pleasant Park	\$ 14,000,000
Tunstall House	2,500,000
Town Hall upfits	3,000,000
Land Acquisition	<u>9,000,000</u>
	\$ 28,500,000

2025 Installment Financing

Equipment & Rolling Stock	\$ 1,890,000 (issued – November 2024)
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2027 General Obligation Bonds

Remaining Transportation	\$ 24,500,000
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Total: \$ **54,890,000**



# General Government Capital Model Update

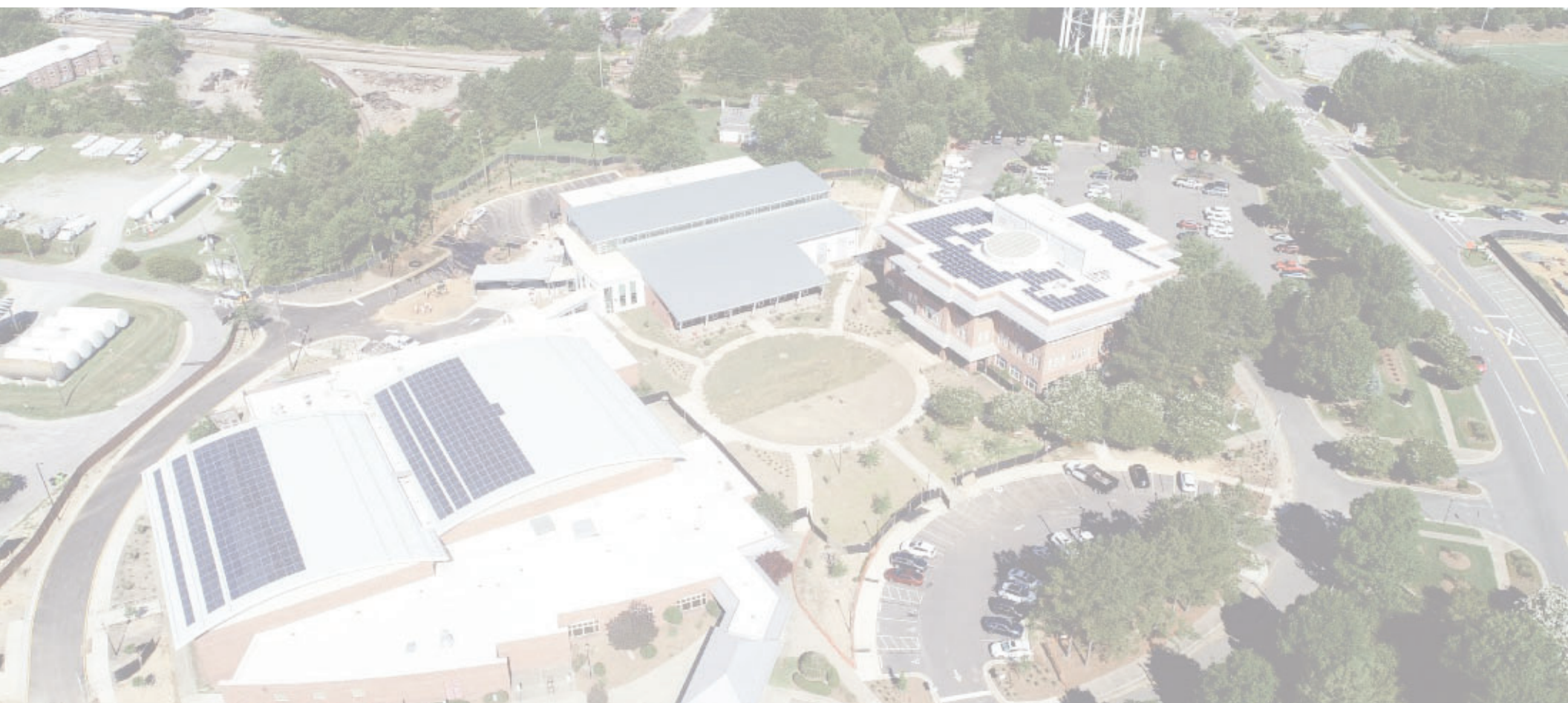
## ► “Steady State”

- Projection of steady/consistent debt affordability for future, unnamed projects
- Capacity in addition to the \$54,890,000 planned issuances
- Two scenarios for illustration purposes
  - Revenue raised in FY25-26 of 1.50¢
  - Revenue raised in 3 consecutive fiscal years of 0.50¢ each

1.50¢ in FY26      \$92,000,000 in additional capacity (\$146,000,000 total)  
( \$23,000,000 every two years starting in 2030)

0.50¢ in FY26  
0.50¢ in FY27  
0.50¢ in FY28      \$84,000,000 in additional capacity (\$138,000,000 total)  
( \$21,000,000 every two years starting in 2030)





# TOWN OF APEX COMPREHENSIVE FACILITIES STUDY

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FEBRUARY 13, 2025

CREECH & ASSOCIATES





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## EXECUTIVE SUMMARY

In the summer of 2023, Creech & Associates began a comprehensive facilities study for staff and programs for various departments/divisions within the Town of Apex government across **37 Buildings/Structures/Properties**. The purpose of this analysis will be to create a Facilities Master Plan to best allocate capital funds and plan for the 20-year horizon.

The study has **four main components**:

**1. Space Needs Assessment**

A complete study of all current and future space requirements for town staff over a 20 year horizon.

**2. Facility Condition Assessment (FCA)**

A detailed evaluation of all building components within the town inventory.

**3. Location Analysis**

GIS data driven study to identify best strategies to improve response times.

**4. Facility Master Planning**

An overlay of the combined 4 components to inform capital improvement planning of the next 20 years.

There were **five locations identified** for a more **detailed master plan study** that examined two options combined into the recommended approach:

**1. Town Hall: Interior Reorganization**

73 Hunter Street

**2. Public Safety Campus: Site Master Plan**

736 Hunter Street

**3. Police Department: Site Master Plan**

205 Saunders Street

**4. Perry Road Site | Proposed Water Resources Campus: Site Master Plan**

1231 Perry Road

**5. Public Works Campus (105A, 105B, 105C): Site Master Plan**

105 Upchurch Street





## **STUDY INTRODUCTION**



## SPACE NEEDS ASSESSMENT

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The scope of this analysis covers the spaces for **29 departments/divisions** that reside within **9 town facilities**. This study represents over **251,117 gross square feet of conditioned space** that houses a large portion of Town of Apex services. Town staff was engaged through surveys and interviews to provide opportunities and constraints in the spaces where they work. Each department's needs are presented in 3 categories:

- Existing Area: Current footprint extracted from digital reproductions of existing drawings
- Current Area: Additional space required to serve the current needs
- Future Area: Additional space required to serve the future needs spanning 20 year

A system of growth metrics based on census and town data is utilized for projecting the rate of growth. Historic data from the previous 10 years is analyzed to forecast the needs for the next 20 years. Drafts of the report were vetted with the town project leadership team to verify the data capture and validity of each assessment. In comparison to the existing area of 162,756 gross square feet currently occupied (across the 9 buildings assessed), the current estimated needs are 210,818 gross square feet if all staff are fully back in the office (30% increase) and the 20- year assessed needs total an estimated 237,567 gross square feet (46% increase).



**31%**  
SPACE NEEDS  
INCREASE  
OVER 20 YEARS  
(CONDITIONED GSF)



**29**  
DEPARTMENTS/  
DIVISIONS  
ASSESSED



**9**  
BUILDINGS  
ASSESSED



## DEPARTMENT LIST

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The 29 departments/divisions included in the Space Needs Assessment scope of work:

- Town Hall Administration
- Budget & Performance Management
- Communications
- Community Development & Neighborhood Connections
- Diversity, Equity, Inclusion (DEI)
- Finance/Accounting
- Human Resources
- Information Technology (IT)
- Legal
- Town Clerk
- Fire Department
- Police Department Office of the Chief
- Police Department Administrative Division
- Police Department Criminal Investigations Division
- Police Department Special Operations Division
- Police Department Patrol Division
- Public Works Administration
- Public Works Facilities & Grounds
- Public Works Solid Waste
- Public Works Streets
- Public Works Water Resources Operations
- Public Works Fleet
- Transportation & Infrastructure Development
- Water Resources Administration & Engineering
- Parks & Recreation Administration
- Economic Development
- Inspections & Permits
- Planning
- Electric Utilities



# FACILITY LIST

## SPACE NEEDS ASSESSED

Facilities included in the Space Needs Assessment scope of work (conditioned space only)\*

▪ Town Hall	45,518 GSF
▪ Fire Administration	2,500 GSF
▪ Current Fire Station 3-Bay Prototype	15,000 GSF
▪ Police Department	27,710 GSF
▪ Public Works Campus	
▪ Public Works Operations Building 105A	27,710 GSF
▪ Water Resources Administration Building 105B	10,529 GSF
▪ Parks & Recreation Administration	
▪ Community Center	44,147 GSF
▪ Halle Cultural Arts Center	10,354 GSF
▪ Senior Center	29,475 GSF
▪ Depot	2,486 GSF
▪ Mason Street Municipal Building	14,688 GSF
▪ Electric Operations Center	21,000 GSF

\*Existing GSF derived from floor plans received from the town. These numbers do not include exterior support spaces (sally ports, storage sheds, etc.)

\*\*Does not represent the entire inventory of town facilities.





## DEFINITION OF TERMS

This page contains terms needed to understand the assessment and program spaces in the buildings. They serve as the basis for determining what spaces need to be addressed moving forward.

### Net Assignable Area (NASF):

- Space required for each individual room
- This is the usable space for each item shown in the space tables. This number serves as the basis for pure program space.

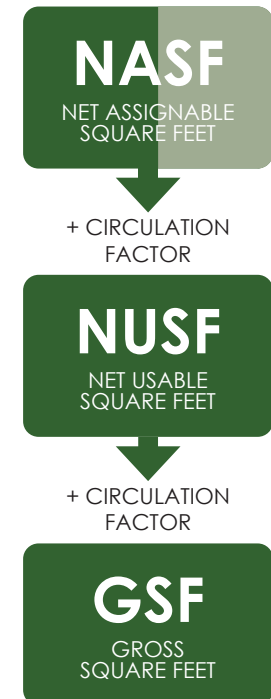
### Net Usable Area (NUSF):

- Space required for each individual department suite
- This is the total usable area with a grossing factor that accounts for local circulation within the suite not listed in the space tables. This metric converts the Net Assignable Area into the total space required to connect spaces into a suite. This factor accounts for circulation space within the department suite.

### Gross Square Feet (GSF):

- Space required for each individual building
- This is the total usable area with a grossing factor that accounts for all other building requirements not listed in the space tables. This metric scales the Net Usable Area into the total space required to connect department suites into a functional building. This factor is divided into three main categories:
  - Building service
  - Horizontal and vertical circulation
  - Mechanical and electrical space

Planning with these metrics define the efficiency of space utilization. These numbers are based off of industry standards for new construction. If the project is a renovation we strive to keep the spaces as close to the standards as feasible within the existing built context.





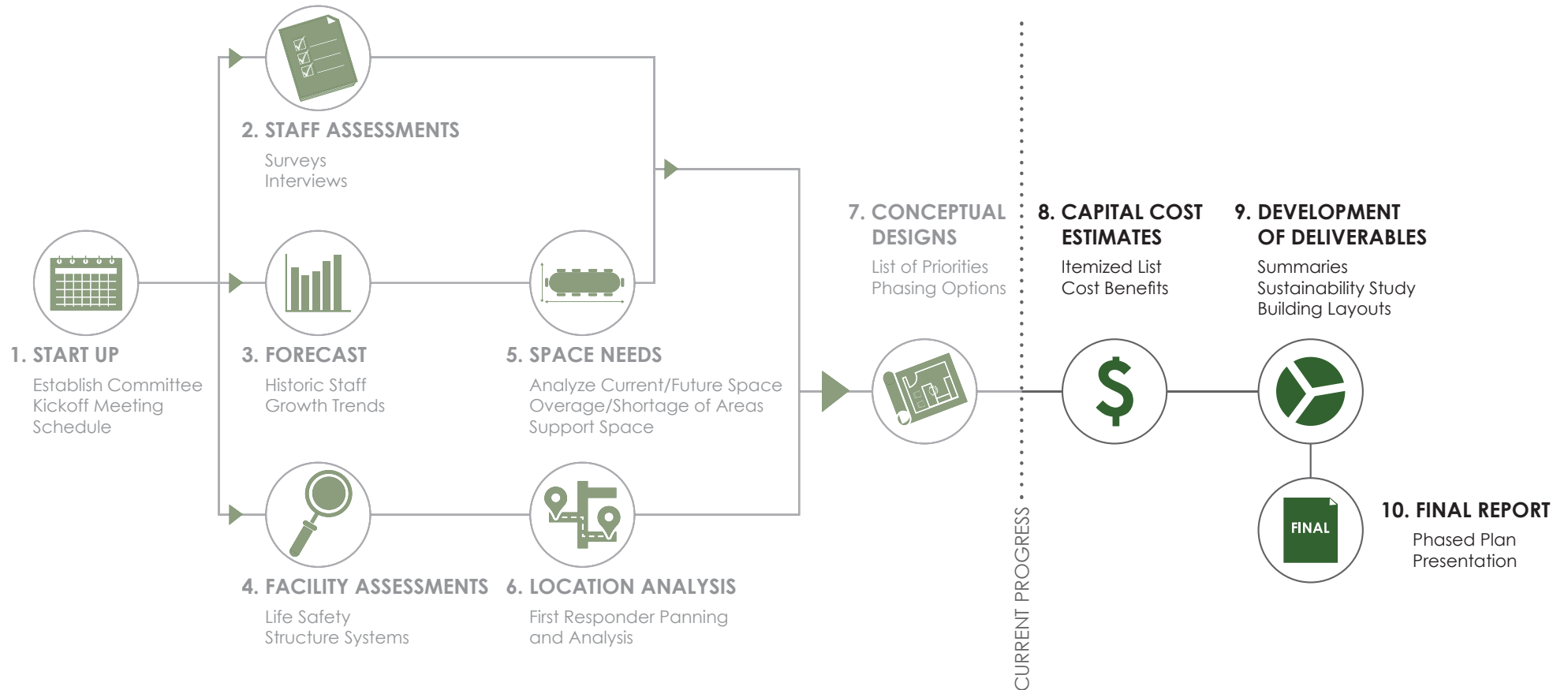


*Our outline for successful facility master planning is an 11-step process with a layered approach to deliverables. Staff interview and space needs assessments are underway while other tasks to identify conditions, locations, or sustainability are also being completed. These tasks occurring in parallel allows for consolidating the timeline and providing all relevant data to inform the master planning strategies. The first 7 tasks are layered to discern the most efficient methodology to addressing space deficits that best utilizes the legacy town building inventory that will remain in service for this study horizon.*

## **THE PROCESS**



# PROJECT ROADMAP







*The initial step in gathering a detailed understanding of how each user groups functions is to spend time in the space where they work. During this time together we review survey responses and tour the facility for perspective on workflow challenges and successes in their daily walk. We also discuss the vision of future growth from the user group leadership, who often has the best set of lenses to predict what is feasible. This valuable information is then compared to our forecast model which is driven by a series of growth metrics that utilize data from the previous 10+ years to create measurable trajectories that parallel population and development projections.*

## **STAFF INTERVIEWS & FORECASTING**



## STAFF INTERVIEW SURVEY

Spending time with town staff in their work environment is a proven method for analyzing spatial and operations deficiencies encountered on a daily basis. While the business conducted in towns across the state are very similar, each municipality has developed their own unique roles over time that cross over and create new demands for space. This process gives each department head the opportunity to express his or her opinion on how spaces are utilized and how conditions could be improved. This information is ultimately vetted by staff and forms the basis for the programs of spaces.

- Surveys were completed by department/divisions heads to capture each department's/division's perspective on how they utilize space
- Staff interviews were conducted with **29** department/divisions heads, encompassing **30+** hours.
- Friendly and professional working environments were found at all locations.
- Every department/division was prepared and open for discussion.
- Staff were relatively conservative in requests for space.
- Over the years staff has become accustomed to doing their best in the space they have been provided.

Most of the **29** departments/divisions had space deficiencies and workflow inefficiencies due to layout

The image shows three overlapping survey forms titled "TOWN OF APEX SPACE NEEDS ANALYSIS OCCUPANT SURVEY". The forms are from Creech & Associates. The top form is partially obscured by the middle one, which is partially obscured by the bottom one. The bottom form is the most visible and contains the following sections:

- STORAGE**: A section with a small diagram of a storage unit and a list of items to be stored.
- WHAT DO YOU DO?**: A section with a list of tasks and a large text area for description.
- 4. Values**: A section with fields for "Average per day (H)", "Average per week (H)", "Peak values of service (H)", and "When/why does parking occur?".
- 5. Which type of spaces do you use to interact with the public?**: A section with checkboxes for "Meet in the Lobby", "Reception or Counter", "Conference Room", "Waiting Room", "Public Area", and "Additional".



## WHAT IS FORECASTING?

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- Mathematical model for estimating future growth of staff
- Based on the notion that staff will grow at similar rates to the population
- Utilizing data from the past 11 years to analyze and forecast the trends for the next 20 years
- Data sources are “growth indicators”
- Model contains 7 different metrics with data from the following sources:
  - U.S. Census American Community Survey (2 different data sets)
  - OSBM (2 different data sets, 5 yr. set not included in summary average)
  - Town of Apex, Residential Building Permits across 10 years
  - Town of Apex, Commercial Building Permits across 10 years (not included in summary average)
  - Town of Apex Planning Department Population Estimates
- Summary provides an average of 5 growth rate metrics



**2022 U.S. Census estimate of  
the Town of Apex  
population =  
71,064**



# POPULATION PROJECTIONS

- Largest growth rate is shown in the Residential Permits over a 10 year span.
- Smallest growth rate is shown in the Town of Apex Population Projection.
- Indicators yielded a town growth rate of about 2.6% - 7.6%.
- **Creech & Associates used the average growth rate of 6.0% to forecast growth moving forward.**

## TOWN POPULATION ESTIMATES

\*Based on an average of all annual growth rate factors

2040	138,913
2035	119,559
2030	100,711
2025	83,126
<b>2022</b>	<b>71,064</b>
2017	50,465
2012	37,589

TOWN OF APEX POPULATION PROJECTIONS							
Metric	2017	2022	ANNUAL FACTOR	2028	2033	2038	2043
U.S. Census American Community Survey Population 5 yr. number increase	50,465	71,064	4.120	95,783	116,382	136,981	157,580
U.S. Census American Community Survey Population 5 yr. percentage increase	50,465	71,064	7.1%	107,162	150,904	212,500	299,240
Metric	2012	2022	ANNUAL FACTOR	2028	2033	2038	2043
U.S. Census American Community Survey Population 10 yr. number increase	37,589	71,064	3.348	91,149	107,887	124,624	141,362
U.S. Census American Community Survey Population 10 yr. percentage increase	37,589	71,064	6.6%	104,136	143,185	196,876	270,699
Metric***	2017	2022	ANNUAL FACTOR	2028	2033	2038	2043
OSBM Population 5 yr. number increase	42,391	69,535	5.429	102,108	129,252	156,396	183,540
OSBM Population 5 yr. percentage increase	42,391	69,535	10.4%	125,927	206,561	338,828	555,787
Metric	2012	2022	ANNUAL FACTOR	2028	2033	2038	2043
OSBM Population 10 yr. number increase	38,809	69,535	3.073	87,971	103,334	118,697	134,060
OSBM Population 10 yr. percentage increase	38,809	69,535	6.0%	98,666	132,069	176,782	236,632
Metric	2013	2023	ANNUAL FACTOR	2028	2033	2038	2043
Residential Permits 10 yr. number increase	2,028	36,089	9.605	232,280	280,306	328,332	376,358
Converted to Population*	88,202	184,254					
Residential Permits 10 yr. percentage increase	88,202	184,254	7.6%	266,309	384,907	556,320	804,070
Metric***	2013	2023	ANNUAL FACTOR	2028	2033	2038	2043
Commercial Permits 10 yr. number increase	288	5,519	23.424	439,568	556,690	673,812	790,935
Converted to Population**	88,202	322,446					
Commercial Permits 10 yr. percentage increase	88,202	322,446	13.8%	616,519	1,178,789	2,253,852	4,309,381
Metric		2025	ANNUAL FACTOR	2028	2033	2038	2043
Town of Apex Planning Dept. Population Projections number increase		83,126	3.504	93,062	111,628	131,070	150,523
Town of Apex Planning Dept. Population Projections percentage increase			2.6%	92,199	104,946	119,455	135,969
POPULATION PROJECTION SUMMARY							
Metric			ANNUAL FACTOR	2028	2033	2038	2043
Average of 5 annual percentage increases (population based on U.S. Census American Community Survey 2022 population estimate)			6.0%	100,732	134,720	180,176	240,970

\*Average Town of Apex household = 2.82 people

\*\*Average Town of Apex population/# employer establishments = 44.78 people

\*\*\*data creates a projection that is above 10% annual growth and is excluded from the average

RECOMMENDED TOWN OF APEX POPULATION PROJECTION SUMMARY							
	2025	2030	2035	2040	2045	2050	2055
Population Projections number increase	83,126	100,711	119,559	138,913	157,919	175,773	191,850
Population Projections Annual Factor number increase	3.312	3.639	3.837	3.870	3.733	3.445	3.052



# STAFF PROJECTIONS

## HOW DOES THIS TRANSLATE?

- Forecast metrics and historic staff growth rate can be compared to department projections
- Projections historically offer a realistic perspective on growth by department
- Utilize the department projection where feasible
- Historic staff growth rate gives annual change metrics and is identified by green/gold circles
- Historic staff growth rate included in metric on line 8 and is included in the average on line 10
- Forecast models that are highlighted in light gray are not factored into the average projection
- The recommended forecast model for the department is highlighted in dark green**

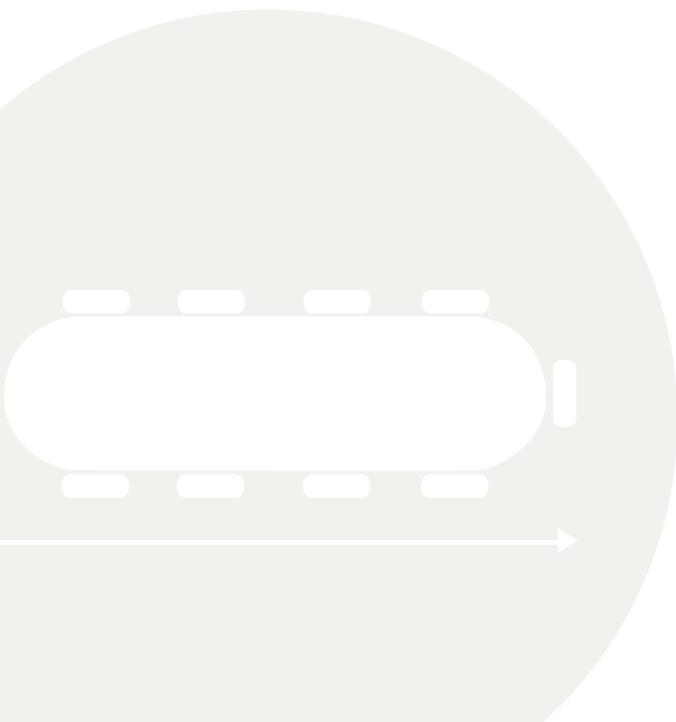


Administration Annual Staff Numbers					
Historic Forecast Data 2014-2023		2014	2023	Annual Change	
				Number	%
Department Historic Staff		6.0	7.0	0.1	1.7%
Forecast Model	Value	2028	2033	2038	2043
1. U.S. Census American Community Survey Population 5 yr. percentage increase	7.1%	10	14	20	28
2. U.S. Census American Community Survey Population 10 yr. percentage increase	6.6%	10	13	18	25
3. OSBM Population 5 yr. percentage increase*	10.4%	11	19	31	51
4. OSBM Population 10 yr. percentage increase	6.0%	9	13	17	22
5. Residential Permits 10 yr. percentage increase*	7.6%	10	15	21	31
6. Commercial Permits 10 yr. percentage increase*	13.8%	13	26	49	94
7. Town of Apex Planning Dept. Population 5 yr. percentage increase	6.5%	10	13	18	25
8. Historic Staff	1.7%	8	8	9	10
9: Department Projection		8	9	9	10
10: Average (items 1,2,4,7-9)	-	9	12	15	20
Recommended Model: Department Projection		8	9	9	10

\*data creates a projection that is 4x larger than the current department staff and is excluded from the average

Historic staff growth rate is calculated and used as another factor to look at department growth for the future. Historic staff compares staff numbers from 10 years ago to staff numbers today. This number reflects staffing numbers from after the recession, and may therefore be lower than the department would typically see. In some cases, departments/divisions are still catching back up to staffing levels seen before the recession.





*Every organization utilizes some type of hierarchy to define leadership structure and supervisory responsibilities of each position. Most often that approach is illustrated through an organization chart with a vertical orientation that delineates layers of roles across the staff profile. Office sizes and amenities can be assigned based on this hierarchy that parallels levels of leadership assigned to each position. This approach of employing industry standards for spaces creates equity across divisions and a guide for division expansion beyond this study horizon. The goal is to create a lean model that advocates open office strategies for appropriate functions while providing privacy for workflow or supervisory requirements, all while “right-sizing” each space to align with the standard.*

## **SPACE STANDARDS**



# SPACE STANDARDS

- Modular plans based on typical space sizes
- Beyond office sizes
- Test-fit models of atypical spaces to derive sizes
- Used as building blocks to generate space programs
- Space needed for functions/job with standards based on function/job requirements

*\*All images shown are of typical space standard examples and are used for space comparison purposes only. They do not necessarily depict exact furniture or layout of room for spaces within the Town of Apex facilities.*



## CONFERENCE

- Multiple requests for dedicated conference rooms within suites
- Assess total requests for meeting space and balance across each facility
- Avoid dedicated conference rooms where possible
- Designing large open spaces to be flexible can help manage number of conference rooms (ex: executive conference room)



## ATYPICAL

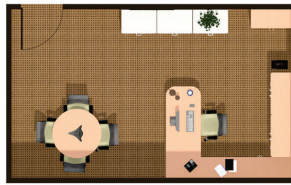
- Spaces that are atypical that require additional expertise to program
- Modules created based on designs of actual similar spaces
- Planning metric vary per the type of space
- Typical amenities and support provided with each space
- Spaces plan for flexible use





## SPACE STANDARDS | OFFICE EXAMPLES

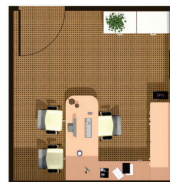
**A** Private Office Module  
12' x 20' @ 240 SF



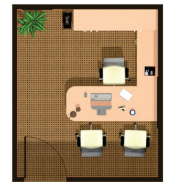
**B** Private Office Module  
12' x 15' @ 180 SF



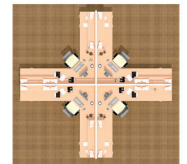
**C** Private Office Module  
12' x 12'-6" @ 150 SF



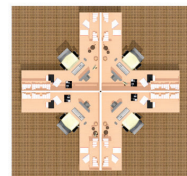
**D** Private Office Module  
10' x 12' @ 120 SF



**E** Open Office Module  
10' x 10'  
100 SF each module  
(4 shown)



**F** Open Office Module  
8' x 8'  
64 SF each module  
(4 shown)







*The following pages contain a high-level summary of the existing, current, and future space needs based on a 20-year study horizon. Each summary contains five columns provided for comparison:*

- *Current Existing Area is the user group footprint occupied at the time of the study.*
- *Current Proposed Area is the footprint our model identifies the user group should occupy.*
- *Future Proposed Area is the footprint our model identifies will serve the user group for 20 years.*

*The flexible work arrangement employed by each user group was also captured for comparison. This strategy does not apply to public safety or service functions based on their operations.*

## **OVERALL PROGRAM SUMMARIES**



## EXISTING & PROPOSED BUILDING SUMMARY

The chart below illustrates the aggregate needs of each facility in comparison to the available area and the priority of need.

Facility	Current Existing Area (GSF)	Current Proposed Area (GSF)	Future Proposed Area (GSF)	Future Growth Percentage
Town Hall	45,518	52,516	59,632	31%
Depot	2,486	2,486	2,516	1%
Electric Operations Center	79,620	82,972	99,672	25%
• Electric Operations Center	21,000	24,352	25,392	21%
• Electric Operations Center Additional Exterior Support Spaces	58,620	58,620	74,280	27%
Fire Administration	2,500	8,188	10,375	315%
Fire Station 3-Bay Prototype	15,000	18,676	18,676	25%
Mason Street Municipal Building	15,457	14,519	16,219	5%
• Mason Street Municipal Building	14,688	13,719	15,419	5%
• Mason Street Municipal Building Additional Exterior Support Spaces	769	800	800	4%
Parks & Recreation Administration	83,976	84,658	85,515	2%
• Community Center	44,147	44,879	45,191	2%
• Halle Cultural Arts Center	10,354	10,275	10,531	2%
• Senior Center	29,475	29,504	29,793	1%
Police Department	36,383	58,701	64,760	78%
• Police Department Building	34,645	49,069	55,128	59%
• Police Department Additional Exterior Support Spaces	1,738	9,632	9,632	454%
Public Works Campus	258,147	445,026	484,100	88%
• Public Works Operations Building 105A	27,710	46,169	48,238	74%
• Public Works Operations Additional Exterior Support Spaces	203,708	372,036	393,648	93%
• Water Resources Administration Building 105B	10,529	10,621	15,646	49%
• Water Resources Administration Additional Exterior Support Spaces	16,200	16,200	26,568	64%
<b>TOTAL CONDITIONED GSF*</b>	<b>258,052</b>	<b>310,455</b>	<b>336,538</b>	<b>30%</b>

\*does not include exterior support spaces (sally ports, storage sheds, etc.)

- Significant additional space needed in building for its proposed use
- Building is approximately right sized for its proposed use
- Excess space will be available in building after departments/divisions in this study move to their proposed location
- Future facility needs identified in this study







*The following pages contain a high-level summary of the existing, current, and future space needs based on a 20-year study horizon. Each summary contains five columns provided for comparison:*

- *Current Existing Area is the user group footprint occupied at the time of the study.*
- *Current Proposed Area is the footprint our model identifies the user group should occupy.*
- *Future Proposed Area is the footprint our model identifies will serve the user group for 20 years.*

*The flexible work arrangement employed by each user group was also captured for comparison. This strategy does not apply to public safety or service functions based on their operations.*

## **BUILDING PROGRAM SUMMARIES**



# BUILDING PROGRAM SUMMARIES | TOWN HALL

The summary below indicates the ability for the existing facility to serve the program of spaces.

► CURRENT EXISTING AREA

26,286 NUSF

Represents the **space available** within the facility

► CURRENT PROPOSED AREA

33,284 NUSF

Represents the **space needed by current** by divisions

► FUTURE PROPOSED AREA

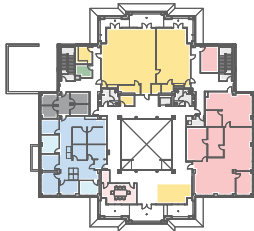
40,401 NUSF

Represents the **20 year projected** space needs for these divisions

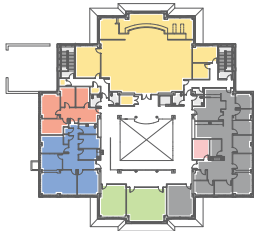
► SPACE DEFICIT

(14,114) NUSF

Represents the **deficit** between the space available and the *future proposed area*



3RD FLOOR



2ND FLOOR



1ST FLOOR



## BUILDING PROGRAM SUMMARIES

THE DEPOT	► CURRENT EXISTING AREA 2,176 NUSF	► FUTURE PROPOSED AREA 2,206 NUSF	► SPACE DEFICIT <b>(30) NUSF</b>
ELECTRIC OPERATIONS CENTER	► CURRENT EXISTING AREA 20,178 NUSF	► FUTURE PROPOSED AREA 24,570 NUSF	► SPACE DEFICIT <b>(4,392) NUSF</b>
FIRE ADMINISTRATION	► CURRENT EXISTING AREA 2,500 NUSF	► FUTURE PROPOSED AREA 7,981 NUSF	► SPACE DEFICIT <b>(5,481) NUSF</b>
MASON STREET MUNICIPAL BUILDING	► CURRENT EXISTING AREA 11,263 NUSF	► FUTURE PROPOSED AREA 11,995 NUSF	► SPACE DEFICIT <b>(731) NUSF</b>
POLICE DEPARTMENT	► CURRENT EXISTING AREA 19,785 NUSF	► FUTURE PROPOSED AREA 40,268 NUSF	► SPACE DEFICIT <b>(20,483) NUSF</b>





## **FACILITY CONDITION ASSESSMENT**



# FACILITY CONDITION ASSESSMENT

Summary of Axias' Facility Condition Index Analysis and Overall Expenditure Analysis

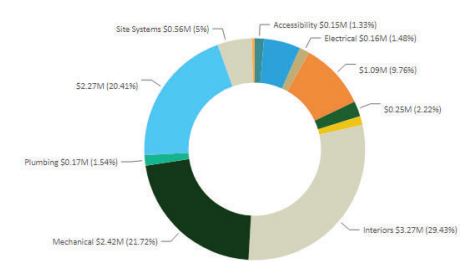
## CONDITION INDEX SUMMARY

Building	FCI	FCNI	FCI	FCNI
Water Reclamation Facility	0.01	0.06	Excellent	Fair
Chamber of Commerce - Depot	0.02	0.07	Good	Fair
Seymour Athletic Fields	0.03	0.07	Good	Fair
Town Hall	0.01	0.07	Excellent	Fair
ACP Classroom	0.03	0.23	Good	Poor
ACP Parks / Rec Maintenance Building	0.04	0.07	Good	Fair
Town of Apex Police Station	0.02	0.07	Good	Fair
Town of Apex Community Center	0.01	0.12	Excellent	Below Average
Electric Utilities Office	0.00	0.01	Excellent	Excellent
Fire Station #1	0.08	0.16	Fair	Below Average
Fire Station #2	0.03	0.15	Good	Below Average
Fire Station #3	0.02	0.20	Good	Poor
Fire Station #4	0.01	0.06	Excellent	Fair
Halle Cultural Arts Center	0.01	0.13	Excellent	Below Average
Public Works Administration	0.01	0.04	Excellent	Good
Public Works Operations	0.01	0.03	Excellent	Good
Purchasing and Inventory Covered Storage	0.00	0.00	Excellent	Excellent
Purchasing and Inventory	0.00	0.03	Excellent	Good
Town of Apex Senior Center	0.00	0.02	Excellent	Excellent
Electric Utility Covered Storage	0.00	0.00	Excellent	Excellent
Electric Utility Vehicle Storage and Maintenance	0.00	0.01	Excellent	Excellent

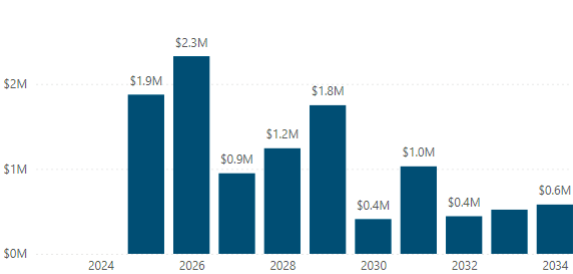
## CONDITION INDEX RANGES

Individual Building FCNI Range	Condition Description
0.00 - 0.02	Excellent condition, typically new construction
0.02 - 0.05	Good condition, renovations occur on schedule
0.05 - 0.10	Fair condition, in need of normal renovation
0.10 - 0.20	Below average condition, major renovation required
0.2 - 0.5	Poor Condition, total renovation indicated
0.5 and above	Renew, Complete facility replacement or renewal indicated

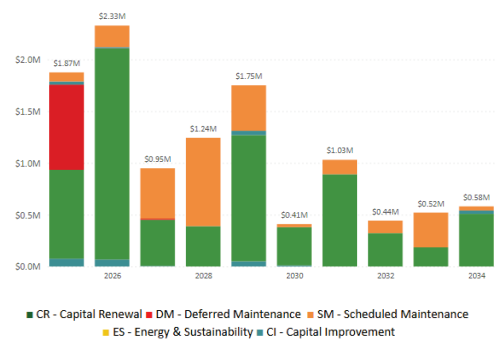
## EXPENDITURE BY SYSTEM



## EXPENDITURE BY YEAR



## EXPENDITURE BY CATEGORY



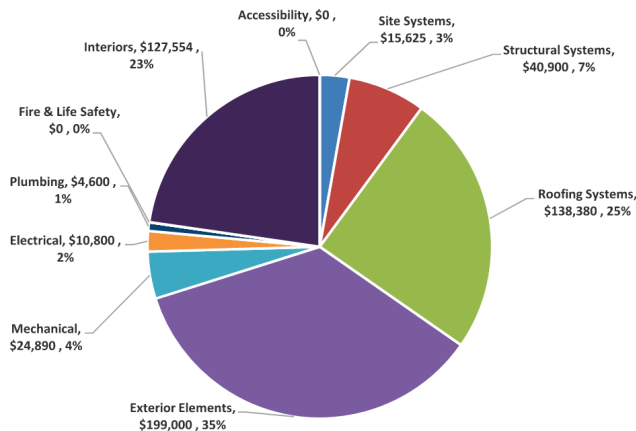


# FACILITY CONDITION ASSESSMENT EXAMPLES

Summary of Axias' capital expenditures for the building systems of FS#1 and FS#3 over the next 10 years found in their "Report of Facility Condition Assessment" Documents

## FIRE STATION #1

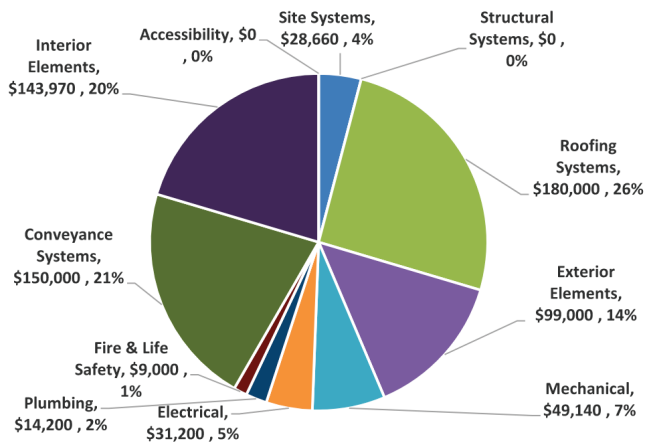
Exterior projects make up the majority of recommendations for the property, while Roofing Systems is the second greatest expenditure category due to the replacement of the roof.



CATEGORY	EXPENDITURES
Deferred Maintenance	\$37,275
Scheduled Maintenance	\$203,440
Capital Renewal	\$306,534
Capital Improvement	\$10,000
Energy & Sustainability	\$4,500
TOTAL	\$561,749

## FIRE STATION #3

Expenditures related to renewal of roofing systems account for around **26%** and conveyance systems account for **21%** of the **total expenditures** recommended. Expenditures related to interior and exterior elements collectively represent the next greatest need and are typically related to life cycle renewal and / or refurbishment of these systems.



CATEGORY	EXPENDITURES
Deferred Maintenance	\$18,200
Scheduled Maintenance	\$63,830
Capital Renewal	\$584,140
Capital Improvement	\$9,000
Energy & Sustainability	\$30,000
TOTAL	\$705,170





*Response GIS completed a location analysis for the Fire department. The intent is to provide a data-driven analysis of the current location of service points based on a number of industry specific performance criteria. The analysis also identifies strategic locations for future service facilities that improve metrics and quality of life for citizens.*

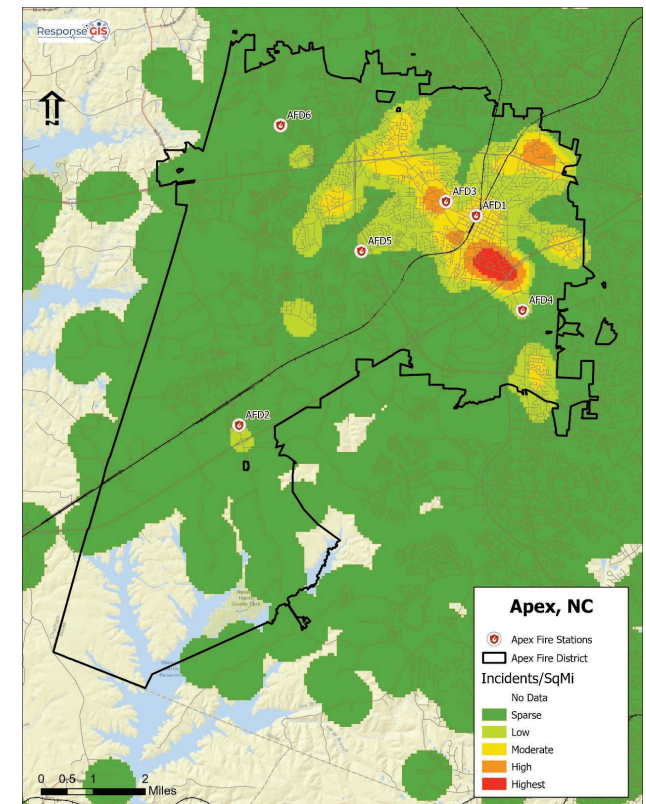
## **LOCATION ANALYSIS**



## LOCATION ANALYSIS

Summary of Response GIS's recommendations found in their "Fire Department Facilities Location Study" Document

- **Supports the moving of Engine 31 into Station 3 after renovation and expansion** as there is a very minor loss in first due response coverage and none in first alarm assembly coverage.
- **Does not support forgoing the Engine in Station 3** for a Station in the potential future **station 7 location** as it is needed for the downtown area first due coverage and first alarm coverage as well.
- Consider **increasing the minimum staffing on Engines throughout CAM** to be able to reduce the apparatus needs for first alarm assignments and increase geographic coverage.
- Consider **additional staff and apparatus in Station 6** as this improves the first alarm coverage geographically currently.
- The additional station scenarios **support an additional station on the westside** of the fire district due to development, anticipated population, demand for services, and increased structural risk to the community. **Stations should be at least 3 bays** with an eye toward future expansion if found necessary in subsequent studies.



Map shows geographically all incident types concentration with location of fire stations.





*The master planning phase represents the informed synthesis of all previous tasks into a series of design vignettes that solve for the key space deficits previously identified.*

*Master plan solutions are proposed at either the site plan or building plan scale to address renovations to existing inventory and new development. Each solution will be accompanied with development phases and associated project costs that are integrated into a 20-year capital improvement plan. The capital improvement plan is intended to serve as a living vehicle that establishes planning milestones and can be adjusted over time to align with available funding.*

## **MASTER PLANNING**



## MASTER PLANNING STUDY AREAS

There were five subjects identified for a more detailed master plan study that examined two options combined into the recommended approach. Three of these study areas would be accomplished through interior renovations of existing buildings, and two as site master plans to guide new construction. The following pages describe the initial options and proposed solutions that were vetted with staff in their respective departments or divisions.

1

**TOWN HALL: INTERIOR REORGANIZATION**  
73 HUNTER STREET

2

**PUBLIC SAFETY CAMPUS: SITE MASTER PLAN**  
736 HUNTER STREET

3

**POLICE DEPARTMENT: SITE MASTER PLAN**  
205 SAUNDERS STREET

4

**PERRY ROAD SITE  
PROPOSED WATER RESOURCES CAMPUS: SITE MASTER PLAN**  
1231 PERRY ROAD

5

**PUBLIC WORKS CAMPUS (105A, 105B, 105C): SITE MASTER PLAN**  
105 UPCHURCH STREET







## **TOWN HALL** INTERIOR REORGANIZATION



## TOWN HALL VARIATIONS SUMMARY

As the current footprint cannot accommodate every department's growth both options propose the relocation of departments. Both consider Administration, Communications, Finance/Accounting, Budget & Performance Management, Legal and Town Clerk as essential to the Town Hall location.

### 10 YEAR OPTION

By prioritizing current organizational needs and planning for potential expansion over the next 20 years, this option addresses both by relocating Community Development & Neighborhood Connections and utilizing Human Resources' 10-year space needs.

- Finance's current expansion is accommodated.
- Human Resources and Communications swap suites.
- The Administration suite expands to support future growth.
- The Town Clerk expands into the vacant room on the east side of the plan.
- Legal moves into vacant offices on the 2nd floor.
- IT is consolidated to server and workroom space only.
- The Tunstall house serves as a shared support and touchdown space for relocated departments.

### 20 YEAR OPTION

Building on the 10-year option, the 20-year plan includes upfitting some spaces to allow Human Resources to expand, with Community Development & Neighborhood Connections, along with DEI, relocating to another site.

- Human Resources expands into shared support space on the 3rd floor to meet the department's 20-year space needs.
- Budget & Performance Management expands to occupy the entire suite, while DEI moves to another location.
- The Tunstall house provides sufficient space for DEI.



# PROPOSED TOWN HALL PROGRAM | 73 HUNTER ST

## 10 YEAR OPTION | OVERVIEW



LEGEND		
DEPARTMENTS	PROPOSED AREA	SHOWN AREA
ADMINISTRATION	3,093 NUSF	2,527 NUSF
BUDGET & PERFORMANCE MANAGEMENT	1,945 NUSF	1,219 NUSF
COMMUNICATIONS	2,681 NUSF	2,689 NUSF
COMMUNITY DEV.& NEIGHBORHOOD CONN.	3,042 NUSF	0 NUSF
DIVERSITY, EQUITY, INCLUSION	835 NUSF	670 NUSF
FINANCE/ACCOUNTING	4,315 NUSF	4,139 NUSF
HUMAN RESOURCES	* 4,501 NUSF	4,357 NUSF
INFORMATION TECHNOLOGY	5,205 NUSF	853 NUSF
LEGAL	2,327 NUSF	2,288 NUSF
TOWN CLERK	1,998 NUSF	1,300 NUSF
PLANNING	93 NUSF	65 NUSF
SHARED SUPPORT	9,050 NUSF	8,006 NUSF
VACANT AREA	0 NUSF	0 NUSF
BUILDING CORE		

- \* Proposed area reflects the 10 year space needs.
- Community Dev. & Neighborhood Connections move to another location.



# PROPOSED TOWN HALL PROGRAM | 73 HUNTER ST

## 20 YEAR OPTION | OVERVIEW



LEGEND		
DEPARTMENTS	PROPOSED AREA	SHOWN AREA
ADMINISTRATION	3,093 NUSF	2,527 NUSF
BUDGET & PERFORMANCE MANAGEMENT	1,945 NUSF	1,898 NUSF
COMMUNICATIONS	2,681 NUSF	2,689 NUSF
COMMUNITY DEV.& NEIGHBORHOOD CONN.	3,042 NUSF	0 NUSF
DIVERSITY, EQUITY, INCLUSION	835 NUSF	0 NUSF
FINANCE/ACCOUNTING	4,315 NUSF	4,139 NUSF
HUMAN RESOURCES	5,790 NUSF	5,799 NUSF
INFORMATION TECHNOLOGY	5,205 NUSF	853 NUSF
LEGAL	2,327 NUSF	2,288 NUSF
TOWN CLERK	1,998 NUSF	1,300 NUSF
PLANNING	93 NUSF	65 NUSF
SHARED SUPPORT	9,050 NUSF	7,207 NUSF
VACANT AREA	0 NUSF	0 NUSF
BUILDING CORE		

- Plan to fulfill the 20 year space needs of Town Hall Departs.
- Community Dev. & Neighborhood Connections move to another location and Diversity, Equity, Inclusion to move to Tunstall house.





**PUBLIC SAFETY CAMPUS**  
SITE MASTER PLAN



# EXISTING PUBLIC SAFETY CAMPUS | 736 HUNTER ST



## ZONING ANALYSIS

■ Zoning Jurisdiction	Town of Apex
■ Zoning District	Office and Institutional (O&I)
■ Front Setback	20'
■ Side Setback	15'
■ Rear Setback	25'
■ Corner Side Setback	15'
■ Max Building Height	48'
■ Max Built-Up Area	70%

## SUMMARY

The site, located at 736 Hunter Street, is home to Apex Fire Station #3. The project includes renovating the station and expanding it with new apparatus bays, support areas, and a rear addition to accommodate both Fire Stations #3 and #1.

The campus will also feature a new two-story fire administration and police substation building, along with a one-story warehouse/storage building positioned for optimal site circulation.

Phase 1 includes the new apparatus bays, support addition, and a detention pond. Future phases will introduce the administration and police substation building, the warehouse/storage facility, and additional parking, with space reserved for potential vertical expansion.



# PROPOSED PUBLIC SAFETY CAMPUS | 736 HUNTER ST



LEGEND		
SITE	PROPOSED AREA	SHOWN AREA
FIRE STATION (FS1 + FS3) RENOVATION & ADDITION		
RENOVATE EXISTING FS3	9,243 GSF	9,243 GSF
NEW APPARATUS BAYS AND SUPPORT 1-STORY ADDITION	12,513 GSF	12,513 GSF
NEW 3-STORY BUILDING		
FIRE ADMINISTRATION	10,375 GSF	10,375 GSF
POLICE SUBSTATION	1,800 GSF	1,800 GSF
ADDITIONAL FLOOR	0 GSF	6,000 GSF
NEW 1-STORY WAREHOUSE/STORAGE	3,600 GSF	3,600 GSF





**POLICE DEPARTMENT**  
SITE MASTER PLAN



# EXISTING POLICE DEPARTMENT \* | 205 SAUNDERS ST



## ZONING ANALYSIS

■ Zoning Jurisdiction	Town of Apex
■ Zoning District	Downtown Business (B2)
■ Front Setback	10'
■ Side Setback	10'
■ Rear Setback	10'
■ Corner Side Setback	10'
■ Max Building Height	70'
■ Max Built-Upon Area	70%

## SUMMARY

The site, located at 205 Saunders Street, is home to the Apex Police Department. The project includes renovating the existing building and adding a new three-story office space to accommodate the department's growing needs. A one-story addition will also house new sally ports.

In addition to the building improvements, the site's parking has been redesigned to meet both current and future requirements, while maintaining secure entry and a protected perimeter.



# PROPOSED POLICE DEPARTMENT | 205 SAUNDERS ST



LEGEND		
SITE	PROPOSED AREA	SHOWN AREA
PD RENOVATION & ADDITION		
RENOVATE EXISTING PD	34,645 GSF	34,645 GSF
NEW 3-STORY OFFICE SPACE ADDITION	20,649 GSF	7,285 GSF
NEW 1-STORY 6-BAY SALLY PORT ADDITION	3,726 GSF	3,780 GSF
EXTERIOR SUPPORT AREA	960 GSF	0 GSF
COVERED SUPPORT AREA	2,378 GSF	0 GSF
ENCLOSED SUPPORT AREA	14,817 GSF	0 GSF

\*This design includes a new driveway within a regulated riparian buffer and is contingent upon approval through the Town of Apex's "No Practical Alternatives" determination process. While classified as "Allowable with Mitigation" per UDO Table 6.1.11.G.1, the project has not yet received formal approval. If approved, mitigation measures per Sec. 6.1.15 will be required to minimize environmental impact and preserve water quality, aquatic habitat, and buffer integrity.





**PERRY ROAD SITE**  
**PROPOSED WATER RESOURCES CAMPUS**  
SITE MASTER PLAN



# EXISTING PERRY ROAD SITE | 1231 PERRY RD



## ZONING ANALYSIS

■ Zoning Jurisdiction	Town of Apex
■ Zoning District	Residential Agricultural (RA) & Light Industrial (LI)
■ Front Setback	20' RA, 20' LI
■ Side Setback	15' RA, 20' LI
■ Rear Setback	25' RA, 20' LI
■ Corner Side Setback	15' RA, 20' LI
■ Max Building Height	36' RA, 48' LI
■ Max Built-Up Area	60% RA, 70' LI

## SUMMARY

The site, located at 1231 Perry Road, will be the new Water Resources Campus for the Town of Apex. The project involves relocating all water resources functions from the current Public Works Campus, located at 105 Upchurch Street to this new site, creating a dedicated campus designed to meet both current and future needs of the department.

In addition to the water resources operations facilities, the campus will feature a new one-story Public Waste Convenience Center for the town's citizens, a new transfer yard, and a new electric substation located along US 1.

The campus design focuses on creating a secure perimeter and positioning the new buildings in a way that shields the rest of the site from street view.



PROPOSED PERRY ROAD SITE | PROPOSED WATER RESOURCES CAMPUS | 1231 PERRY RD



LEGEND		
SITE	PROPOSED AREA	SHOWN AREA
NEW 1-STORY BUILDING		
WR OPERATIONS	15,168 GSF	15,168 GSF
WR ADMINISTRATION & ENGINEERING	9,832 GSF	9,832 GSF
NEW 1-STORY PUBLIC WASTE CONVENIENCE CENTER		
	5,000 GSF	5,000 GSF
ELECTRIC SUBSTATION BLDG/AREA		
	87,120 GSF	87,120 GSF
EXTERIOR PUBLIC WASTE YARD		
	87,120 GSF	118,00 GSF
EXTERIOR TRANSFER YARD		
	87,120 GSF	118,00 GSF
COVERED SUPPORT AREA		
	6,010 GSF	7,000 GSF
NEW 1-STORY WAREHOUSE ENCLOSED STORAGE		
WR OPERATIONS	12,798 GSF	13,000 GSF





**PUBLIC WORKS CAMPUS (105A, 105B, 105C)**  
SITE MASTER PLAN



# EXISTING PUBLIC WORKS CAMPUS | 105A, 105B, 105C UPCHURCH ST



## ZONING ANALYSIS

■ Zoning Jurisdiction	Town of Apex
■ Zoning District	Office and Institutional (O&I)
■ Front Setback	20'
■ Side Setback	15'
■ Rear Setback	25'
■ Corner Side Setback	15'
■ Max Building Height	48'
■ Max Built-Upon Area	70%

## SUMMARY

The site, located at 105 Upchurch Street, is home to the Town of Apex Public Works Campus, consisting of Buildings 105A, 105B, and 105C. This project follows the relocation of Water Resources to the proposed Perry Road site, allowing Public Works to expand into the vacated space to meet its 20-year space needs.

Two site planning options are being considered. Option 1 focuses on utilizing existing facilities without new construction. Option 2 optimizes the campus with targeted expansions, including three new covered support areas, an expanded vehicular storage building and additional Fleet service bays in Building 105A.



## PROPOSED PUBLIC WORKS CAMPUS SITE VARIATIONS SUMMARY

As the current footprint cannot accommodate every division's current and future space needs, both options that explore the reorganization of exterior support on the Public Works campus remain at a deficit.

### OPTION 1

29% CAMPUS DEFICIT

This option shows the future proposed program that fits within existing parameters with **no new construction**.

- Meets 71% of campus space needs, including conditioned personnel spaces and exterior, covered, and enclosed support areas.
- Fulfills 91% of exterior support area requirements.
- Covered support areas remain unchanged, meeting 21% of current needs.
- Enclosed support areas within the purchasing warehouse remain unchanged.
- After Water Resources relocates to Perry Road, their current storage in the vehicular storage building will be used by Fleet (storage, HD bays, wash bay), meeting 62% of enclosed support area needs.
- All Water Resources departmental functions move to the proposed Perry Road site, except those in the purchasing warehouse (existing functions remain, future needs accommodated at Perry Road).

### OPTION 2

17% CAMPUS DEFICIT

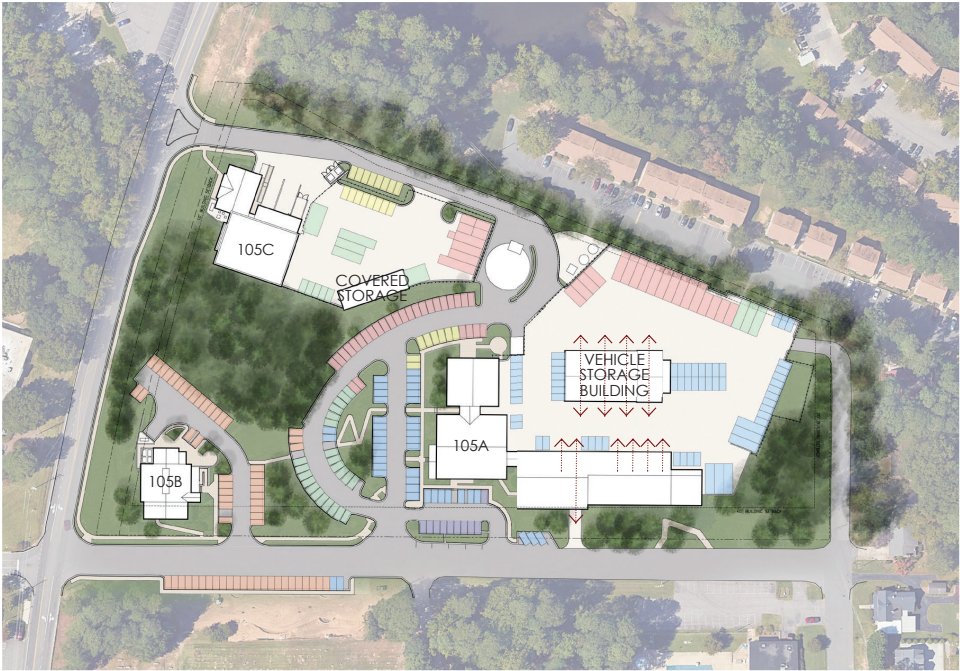
This option shows the future program that can fit on the existing site with **new construction**.

- Meets 83% of campus space needs, including conditioned personnel spaces and exterior support areas.
- Fulfills 78% of exterior support area requirements.
- Three new covered support areas proposed for Solid Waste, Fleet, and Street, meeting 70% of covered support area needs.
- Enclosed support areas within the purchasing warehouse remain unchanged.
- After Water Resources relocates to Perry Road, their current storage in the vehicular storage building will be used by Fleet (storage, HD bays, wash bay).
- Expansion proposed for the existing vehicular storage building (adjacent to the mechanical room) to support Fleet, Facilities & Grounds, and Solid Waste.
- Additional expansion proposed for Building 105A, adding four 6-ton service bays, meeting 82% of enclosed support area needs.
- All Water Resources departmental functions move to the proposed Perry Road site, except those in the purchasing warehouse (existing functions remain, future needs accommodated at Perry Road).

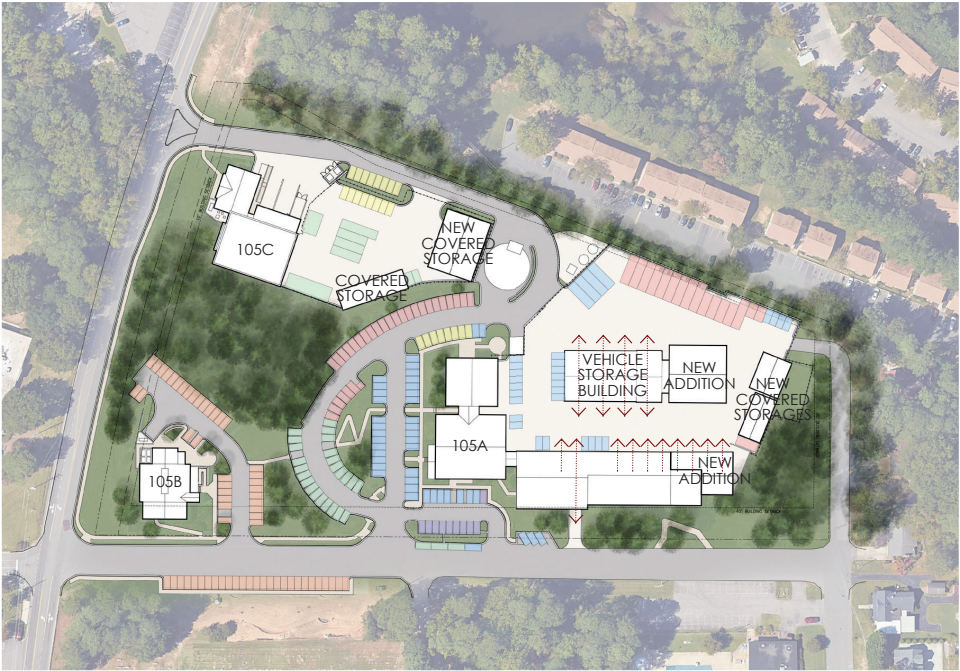


# PROPOSED PUBLIC WORKS CAMPUS | 105A, 105B, 105C UPCHURCH ST

**OPTION 1** 29% CAMPUS DEFICIT



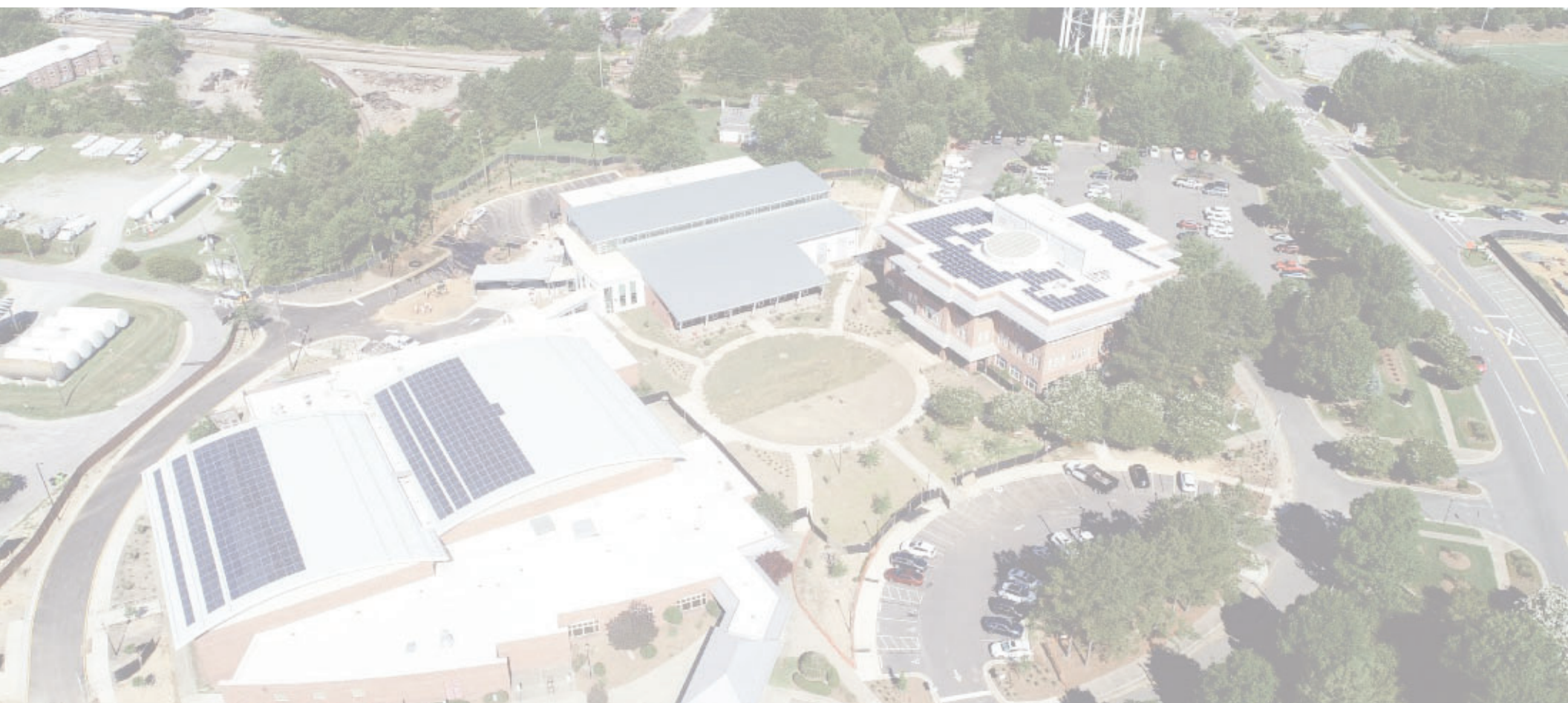
**OPTION 2** 17% CAMPUS DEFICIT



LEGEND

ADMINISTRATION	FACILITIES AND GROUNDS	SOLID WASTE	STREETS	FLEET	TRANSPORTATION AND INFRASTRUCTURE DEVELOPMENT
----------------	------------------------	-------------	---------	-------	---





# TOWN OF APEX COMPREHENSIVE FACILITIES STUDY

---

FEBRUARY 2025

CREECH & ASSOCIATES





# Public Engagement Budget Priorities Survey



**APEX**  
NORTH CAROLINA





# Budget Priorities Survey Communication

Social Media  
Campaigns  
(FB/IG/ND)

Sidewalk Stickers  
on Greenways &  
at Town  
Locations

Go Apex Channel  
Cards

Suburban Living  
Magazine Article

Town Homepage  
& Budget  
Website

Digital Signage &  
Print Flyers at  
Town Locations

All in Apex  
eNewsletter (3x)

CommUniverity  
& Beautification  
Grant Info  
Sessions

Ebill (1/1 & 1/15)  
to over 13k  
Customers





# Budget Priorities Survey Reach

↑30%

825  
Respondents

↑149%

30,644  
Social Media  
Accounts  
Reached

↑14%

11,590  
Instagram  
This or That  
Story Views



# BUDGET PRIORITIES SURVEY

## Fiscal Year 2025-2026

 Translate



### FY26 Budget Priorities Survey

The Town of Apex wants to know your preferences and expectations for how your tax dollars should be spent.

Your input will play a vital role in setting the Town's budget priorities and ensuring we continue to provide the services and projects that matter most to you.

Intro

Required Questions

Strategic Goals

Focus Areas

Comments

Demographics

The Town of Apex creates its **annual budget** during a year-long process involving Town Council, Town staff, and YOU.

We value your input in shaping the financial priorities of our community, and we want to hear from YOU.






Please complete this 10-minute survey by **Monday, February 3, 2025**.

Thank you for participating and helping us build a better future for our community!

*\*For questions or technical difficulties, please contact [annual.budget@apexnc.org](mailto:annual.budget@apexnc.org)*

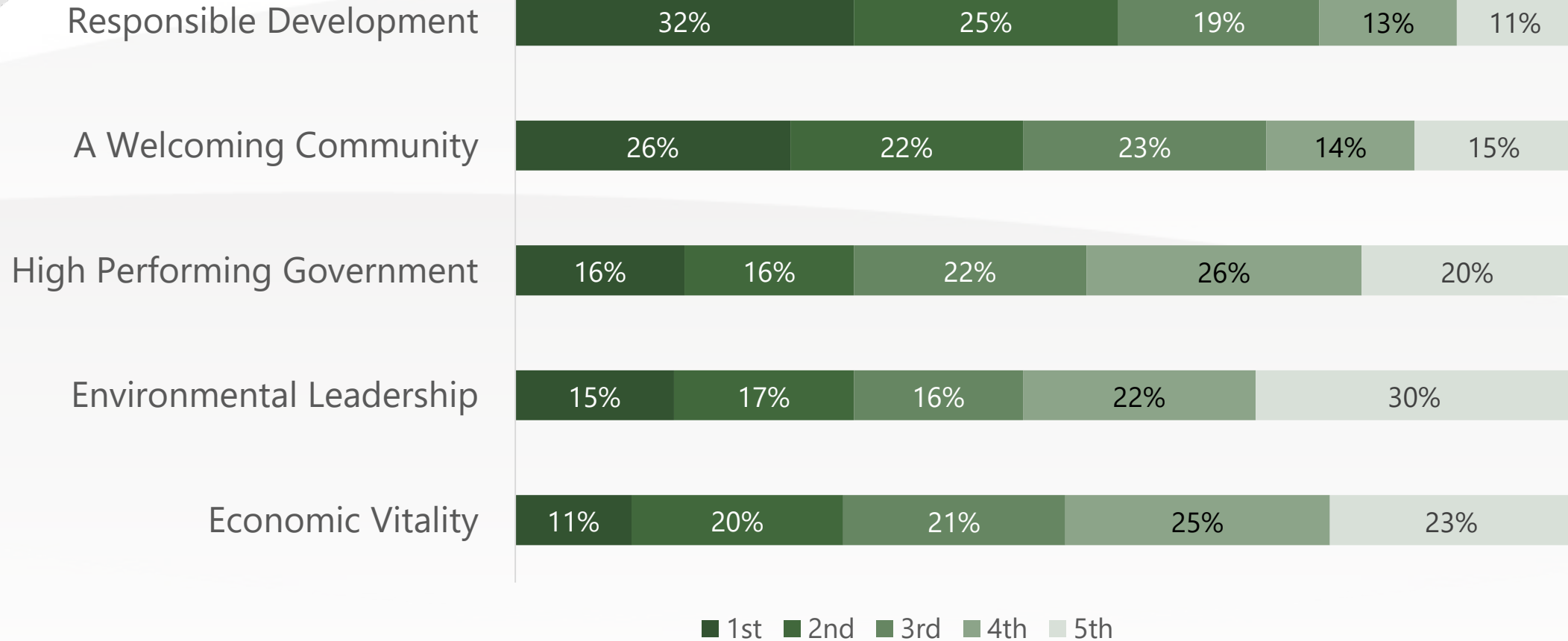


# Step 1 –Rank Strategic Goals

A Welcoming Community	High Performing Government	Environmental Leadership	Responsible Development	Economic Vitality
				
Create a safe and welcoming environment fostering community connections and high-quality recreational and cultural experiences supporting a sense of belonging.	Deliver exceptional service valuing an engaged workforce with an emphasis on efficiency, collaboration, innovation, and inclusion.	Commit to sustaining natural resources and environmental well-being.	Encourage equitable and sustainable development that provides accessibility and connectivity throughout the community.	Improve and sustain an environment that invites and retains a diversity of residents, employment opportunities, and businesses.



# Strategic Goal Ranking





## Step 2 – Rank Focus Area

**\* A Welcoming Community:** Create a safe and welcoming environment fostering community connections and high-quality recreational and cultural experiences supporting a sense of belonging.

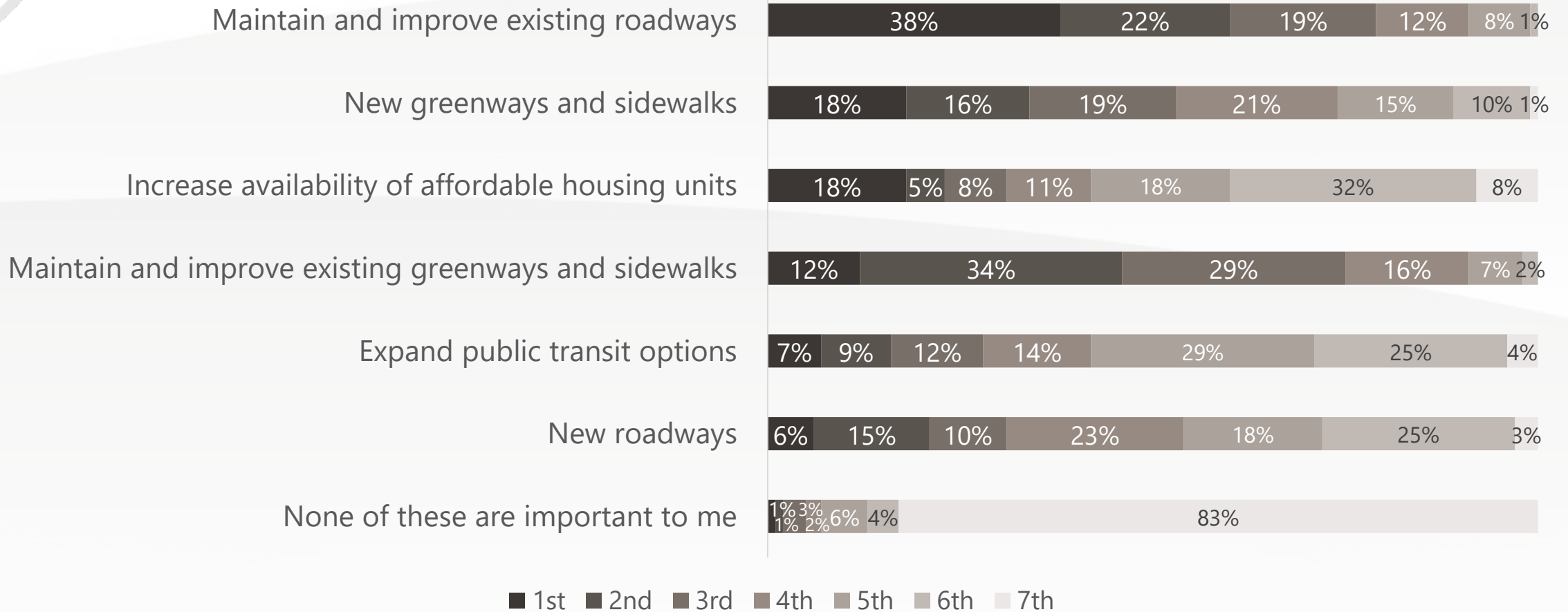


NEXT PRIORITY

- Additional athletic programming
- Enhance cultural and arts programming
- Improve existing parks and recreation facilities
- New parks and recreation facilities
- Vibrant and accessible downtown community spaces
- None of these are important to me



# Responsible Development









# A Welcoming Community

Vibrant and accessible downtown community spaces

37% 23% 19% 11% 8% 2%

Improve existing parks and recreation facilities

27% 33% 24% 12% 4%

New parks and recreation facilities

14% 20% 18% 24% 21% 3%

Enhance cultural and arts programming

9% 16% 21% 25% 26% 3%

Additional athletic programming

8% 8% 16% 26% 40% 2%

None of these are important to me

3% 2% 2% 89% 1% 3%

1st 2nd 3rd 4th 5th 6th



# What Does the Town Do Best?





# High Performing Government

Exceptional customer service for community members

40%

35%

15%

10%

Active community engagement and communication

39%

28%

16%

15%

2%

Competitive employee pay and benefits

14%

20%

35%

26%

5%

None of these are important to me

5%

2%

3%

1%

89%

Professional employee development and training

3%

15%

30%

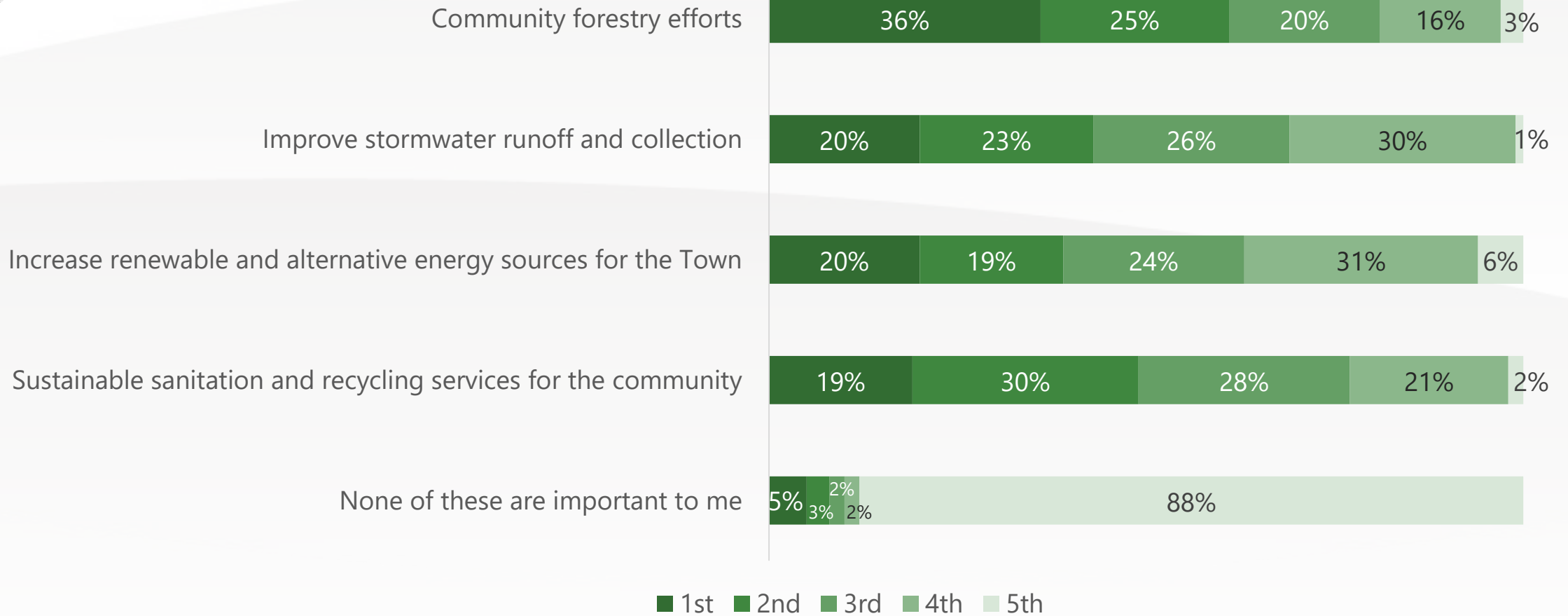
49%

3%

1st 2nd 3rd 4th 5th



# Environmental Leadership





# Economic Vitality

Expand infrastructure to support new and growing businesses



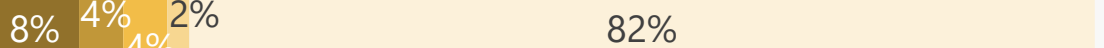
Promotional initiatives for downtown businesses



New business sites identification and development



None of these are important to me



Marketing campaigns to attract new businesses



1st 2nd 3rd 4th 5th



# Budget Priorities Survey Dashboard

## FY26 Budget Priorities Survey Results

### *About This Dashboard*

The Town of Apex takes a collaborative approach to creating its annual budget through a year-long process that involves Town Council, Town staff, and most importantly, residents. Resident input is essential in shaping financial priorities that reflect the needs and aspirations of our community.

This dashboard is designed to provide an accessible, transparent view of the results from the **FY26 Budget Priorities Survey**. Here, you'll find a breakdown of resident feedback, highlighting the priorities that matter most to our community. By presenting the data in a clear and digestible format, we aim to empower you to stay informed and engaged throughout the budgeting process.



**Strategic Goals**

**Focus Area**

**Demographics**





# Capital Projects Prioritization Results & Discussion




**APEX**  
NORTH CAROLINA





# Capital Improvement Plan (CIP) Overview

- Planning mechanism by which the Town Council allocates limited financial resources to implement long-term goals
  - Utilizes adopted plans and factors to shape projects and needs
    - Plan examples – Downtown Master Plan, Transportation Plan, Parks and Recreation Master Plan
    - Factor examples – development reports, debt capacity, potential funding sources
  - The Capital Improvement Plan is simply that – a *plan*
  - 1<sup>st</sup> year of the CIP is adopted with funding at start of fiscal year
    - All future years are simply a plan
    - Subject to change based on future priorities and financial constraints
- 



# Major Objectives of the CIP

## Purpose



- Forecast and match projected revenues and major capital needs over a 5-year period
- Link community infrastructure needs and the financial capacity of the Town
- Capture major capital expenses
  - Asset value > \$100,000
  - Useful life > 3 years

## Eligible Projects

- Acquisition of land
- Construction or significant renovation of public facilities (i.e. buildings/parks)
- Construction of new transportation infrastructure (i.e. roads, sidewalks, multi-use paths)
- Expansion or significant renovation of water, wastewater, electric, or stormwater infrastructure
- Capital equipment to support operations






# General Fund CIP Project Summary

Element	Submittals	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30	Future
 Transportation	32	15,694,548	34,558,250	23,798,375	17,852,742	10,889,903	44,507,367
 Parks, Recreation & Cultural Resources	18	4,775,000	15,139,500	18,172,000	13,825,000	112,350,000	160,435,000
 Public Facilities	15	11,224,000	10,640,000	3,470,000	10,956,600	2,820,000	31,566,200
 Public Safety	10	2,509,050	5,049,050	1,925,000	1,308,000	-	1,546,720
 Public Works	9	1,206,000	804,000	-	225,000	-	685,000
<b>Total All General Fund</b>	<b>84</b>	<b>\$35,408,598</b>	<b>\$66,190,800</b>	<b>\$47,365,375</b>	<b>\$44,176,342</b>	<b>\$126,059,903</b>	<b>\$284,102,112</b>



## Utility Fund CIP Project Summary

Element	Submittals	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30	Future
 Water Sewer Utility	30	7,989,300	15,055,750	6,340,500	44,849,000	3,251,500	40,296,825
 Stormwater Utility	5	-	520,000	2,475,000	292,000	-	-
 Electric Utility	10	11,800,700	11,941,000	7,503,080	10,376,272	5,065,000	5,065,000



## How are Project Selected to Rank?

- Each year the CIP is re-prioritized to align with initiatives and financial conditions as such it is possible that projects will be ranked during multiple years
- Projects excluded from ranking:

Ongoing

Fall outside the 5-year  
funding purview

Required for operations  
(i.e. facility maintenance,  
equipment replacement)

- Projects within the CIP, outside of the above categories are selected for ranking



# Scoring Criteria – Staff

## • 8 Categories

### Public Health & Public Safety - Select ONE Response \*

- ☐ Prevents or corrects an imminent and significant health or safety hazard
- ☐ Prevents or corrects a significant potential health or safety hazard
- ☐ Project improves the feeling of safety
- ☐ Not Applicable

### Deferred Maintenance or Existing Infrastructure/Facilities - Select ONE Response \*

- ☐ Major infrastructure repair and major financial, physical, or personnel consequences will result if not done
- ☐ Major infrastructure repair, but minor financial, physical, or personnel consequence will result if not done
- ☐ Not Applicable

### Legal Mandate - Select ALL that apply \*

- ☐ Project mandated by State and/or Federal Law
- ☐ Project mandated by Town Council
- ☐ Project mandated by legal settlement, contractual obligation or regulation
- ☐ Project corrects a violation of Town or State code that would result in fines
- ☐ Not Applicable

### Business Plan/Existing Project - Select ALL that apply \*

- ☐ Project is prioritized in existing Business Plan
- ☐ Project is required to complete an existing project
- ☐ Not Applicable

### Funding/Budget Impact - Select ONE Response \*

- ☐ Project produces an immediate significant reduction in operating costs
- ☐ Project costs are 50% to 100% covered by non-Town funding sources
- ☐ Project costs are up to 50% covered by non-Town funding sources OR will generate significant revenue to offset operating costs
- ☐ Project has dedicated funding sources other than General Fund (i.e. User Fees)
- ☐ Not Applicable

### Extent of Primary Service Area - Select ONE Response \*

- ☐ Project serves the entire Town
- ☐ Project primarily of interest to a specific population

### Economic Development - Select ALL that apply \*

- ☐ Project directly and substantially increases Town revenues
- ☐ Project increases community wealth (jobs, cultural attractions, business retention, etc)
- ☐ Expand infrastructure to accommodate planned increase in capacity
- ☐ Not Applicable

### Governmental Services - Select ALL that apply \*

- ☐ Project is essential to maintaining the Town's current level of service for a core function to the public
- ☐ Project will improve the Town's systems or facilities to enhance service delivery, increase productivity or improve access to information for the public
- ☐ Project uses best practices to improve business processes
- ☐ Not Applicable



# Scoring Criteria – Town Council

Step 1

Step 2

Step 3

Step 4

\* Please drag and drop **ALL** projects into the empty slot at the top of the page. Move projects into your preferred order with your **highest priority at the top** of the list and **lowest at the bottom**.

*Click "Confirm Priorities" to finalize your ranking, and then click "Continue".*

NEXT PRIORITY

☐ Salem Street Downtown Streetscape, Gathering Space, & Alleys (pg. 2)

☐ Jessie Drive Phase 2 (pg. 2)

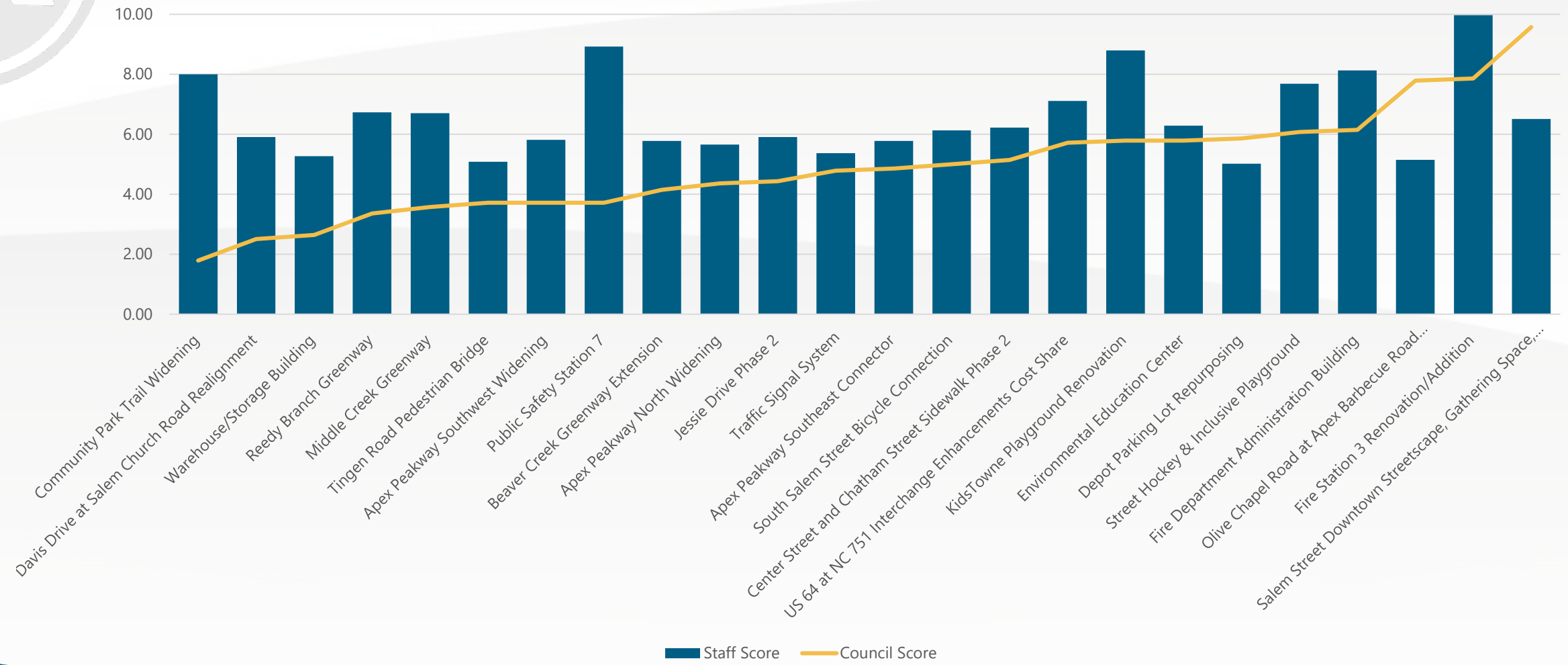
☐ Tingen Road Pedestrian Bridge (pg. 2)

☐ Davis Drive at Salem Church Road Realignment (pg. 2)

☐ Apex Peakway North Widening (pg. 2)



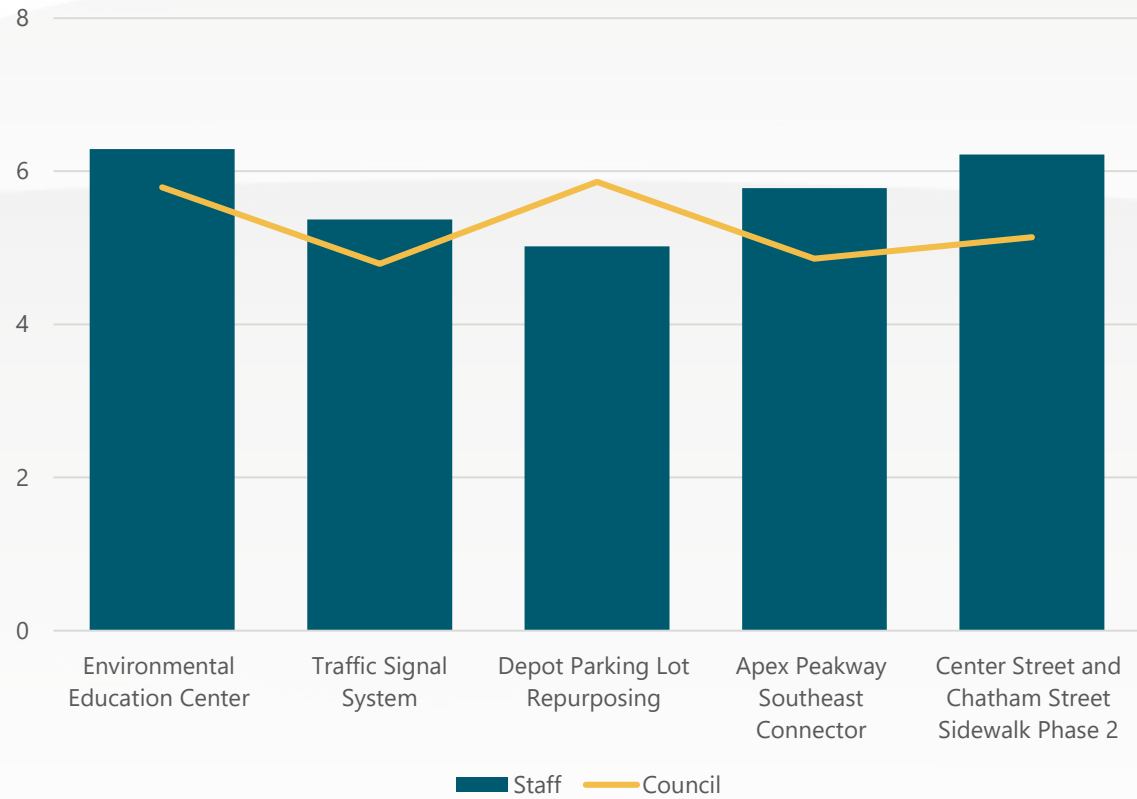
# Staff-Council Agreement



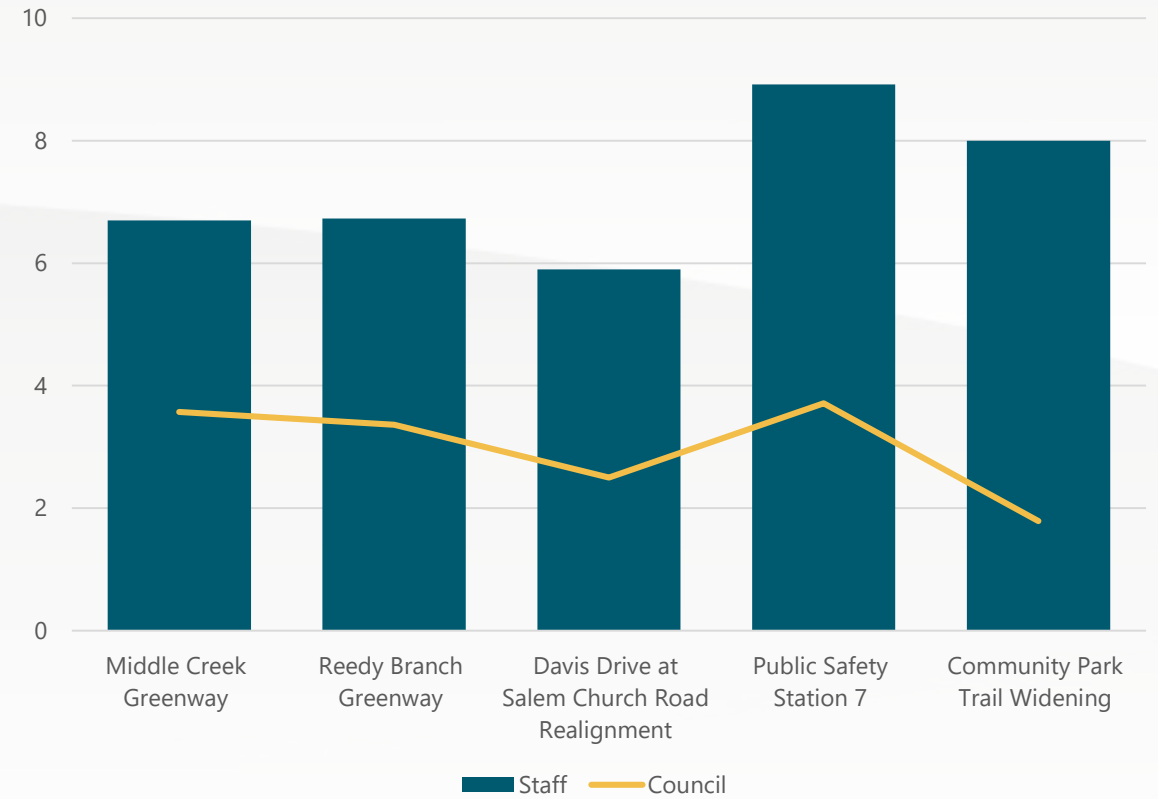


# Staff-Council Agreement

## Council-Staff Highest Agreement

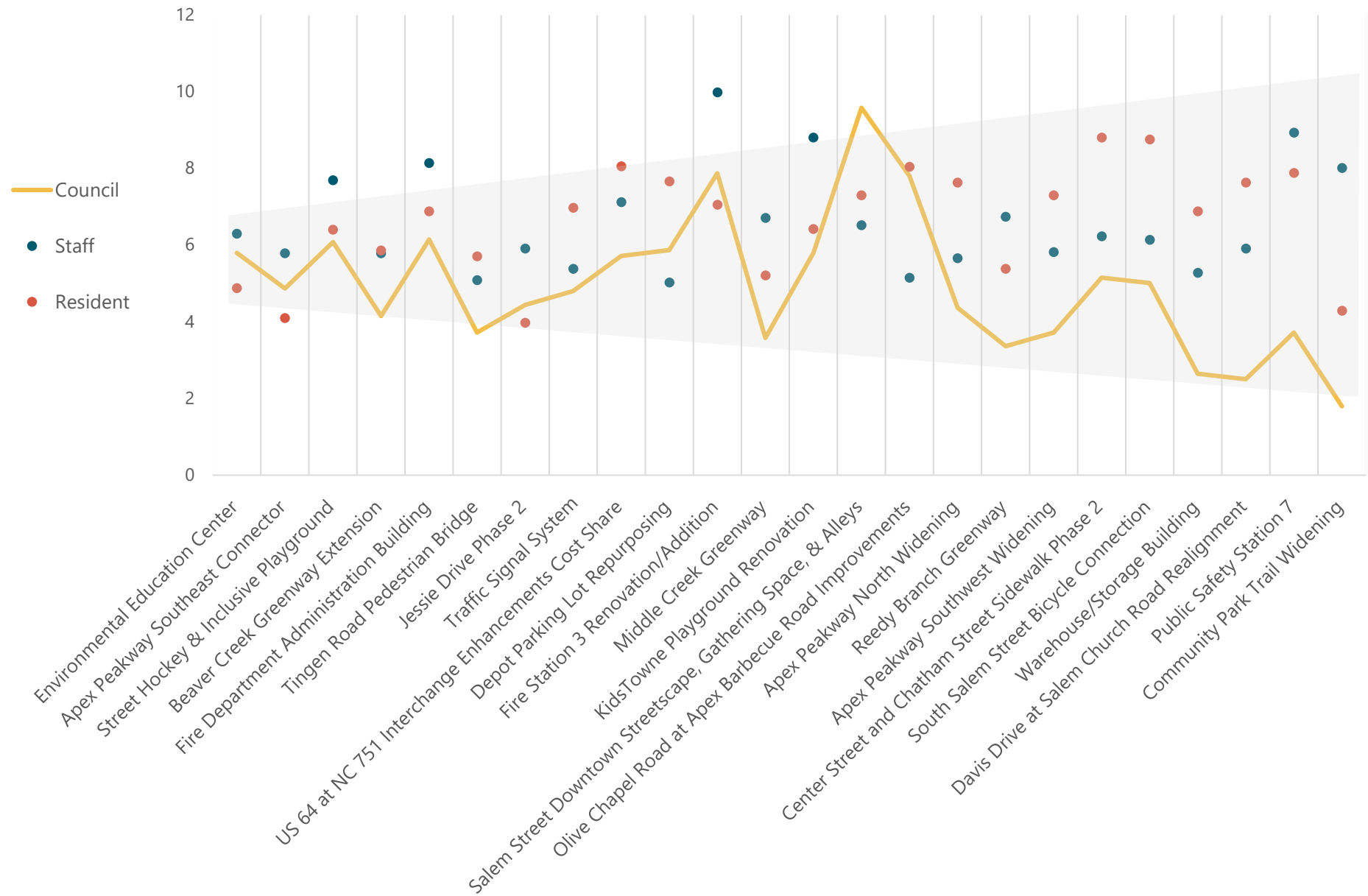


## Council-Staff Lowest Agreement





# Council-Staff-Resident Agreement



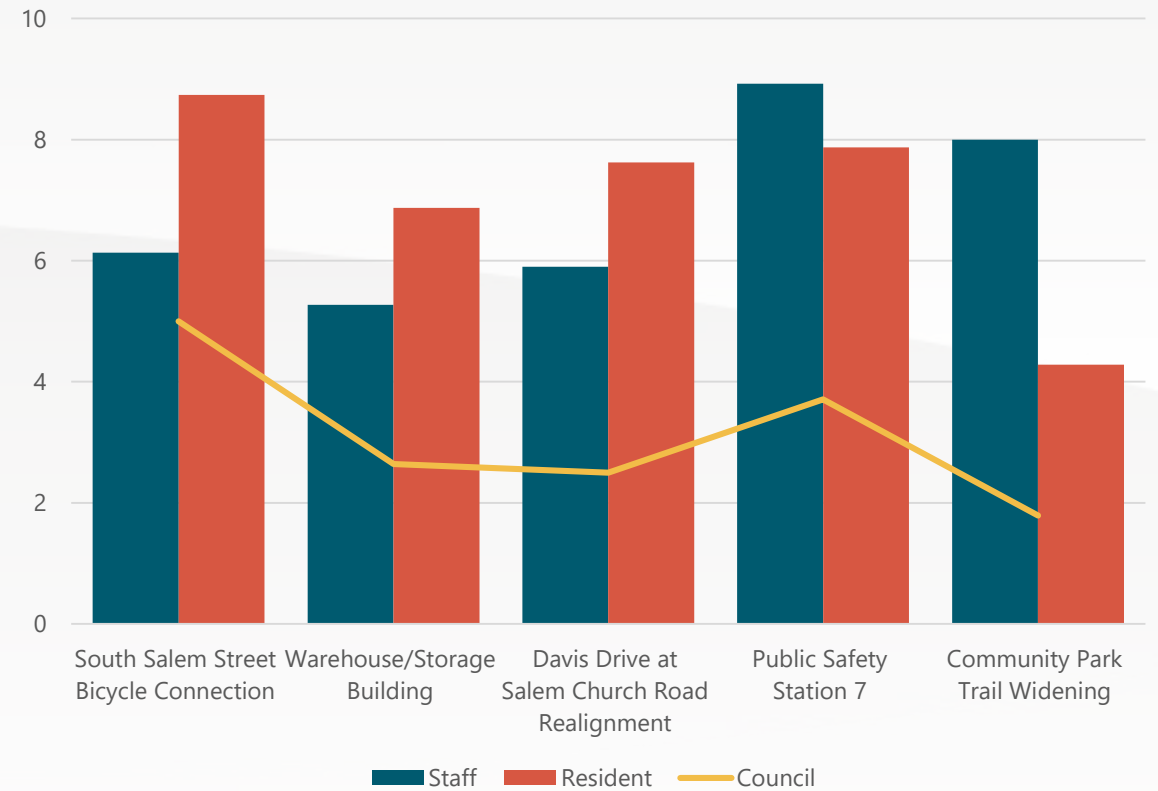


# Council-Staff-Resident Agreement

## Council-Staff-Resident Highest Agreement

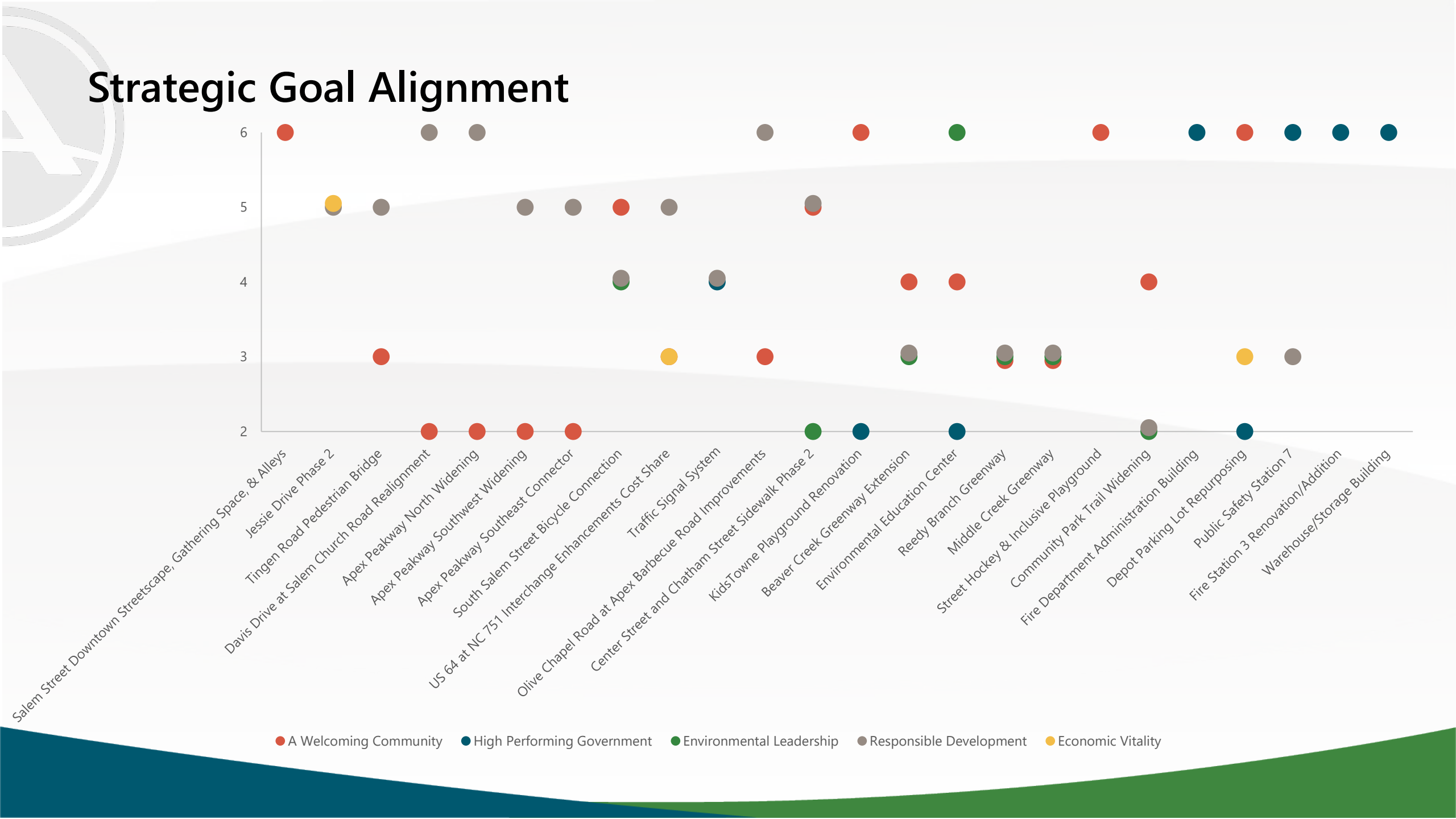


## Council-Staff-Resident Lowest Agreement



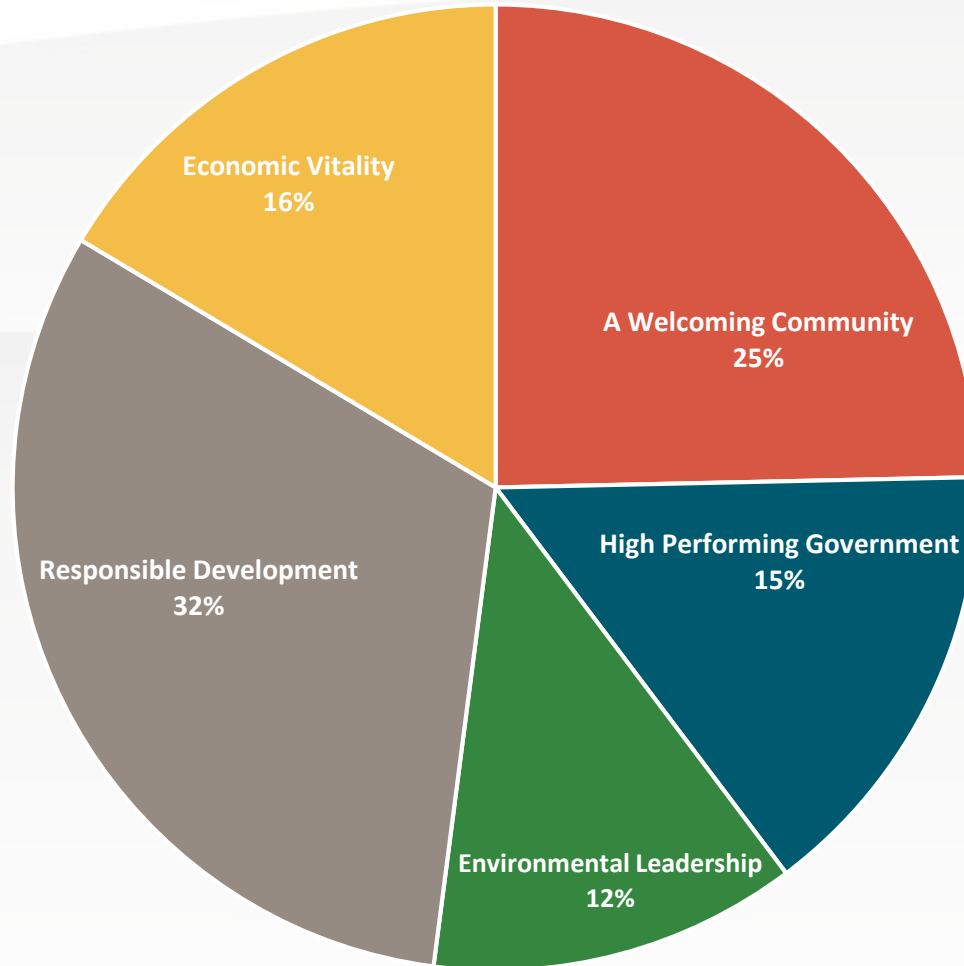


# Strategic Goal Alignment





# Strategic Goal Alignment





# Capital Project Prioritization Results & Discussion


1. Above Average Score, Above Average Agreement	2: Above Average Score, Below Average Agreement
Salem Street Downtown Streetscape, Gathering Space, & Alleys Olive Chapel Road at Apex Barbecue Road Improvements Center Street and Chatham Street Sidewalk Phase 2 Fire Department Administration Building Depot Parking Lot Repurposing Fire Station 3 Renovation/Addition	South Salem Street Bicycle Connection US 64 at NC 751 Interchange Enhancements Cost Share KidsTowne Playground Renovation Environmental Education Center Street Hockey & Inclusive Playground
3: Below Average Score, Below Average Agreement	4: Below Average Score, Above Average Agreement
Jessie Drive Phase 2 Tingen Road Pedestrian Bridge Apex Peakway North Widening Apex Peakway Southwest Widening Apex Peakway Southeast Connector Beaver Creek Greenway Extension Reedy Branch Greenway Middle Creek Greenway	Davis Drive at Salem Church Road Realignment Traffic Signal System Community Park Trail Widening Public Safety Station 7 Warehouse/Storage Building





# Capital Project Prioritization Results & Discussion

## What priority changes would Council like to make?

- These priorities may change depending on the availability of federal grant funding.
  - "Time on backlog" is important to me as well - things that have lingered for years either need to be done, or cut
  - 1st priority is to finish what we started. 2nd priority are projects that have been deferred several times but need to be done. We shouldn't be resetting priorities after projects start and leave a backlog of partially completed projects. It's difficult for staff to manage all the WIP and difficult to assess actual available funding to allocate to new projects.
- 



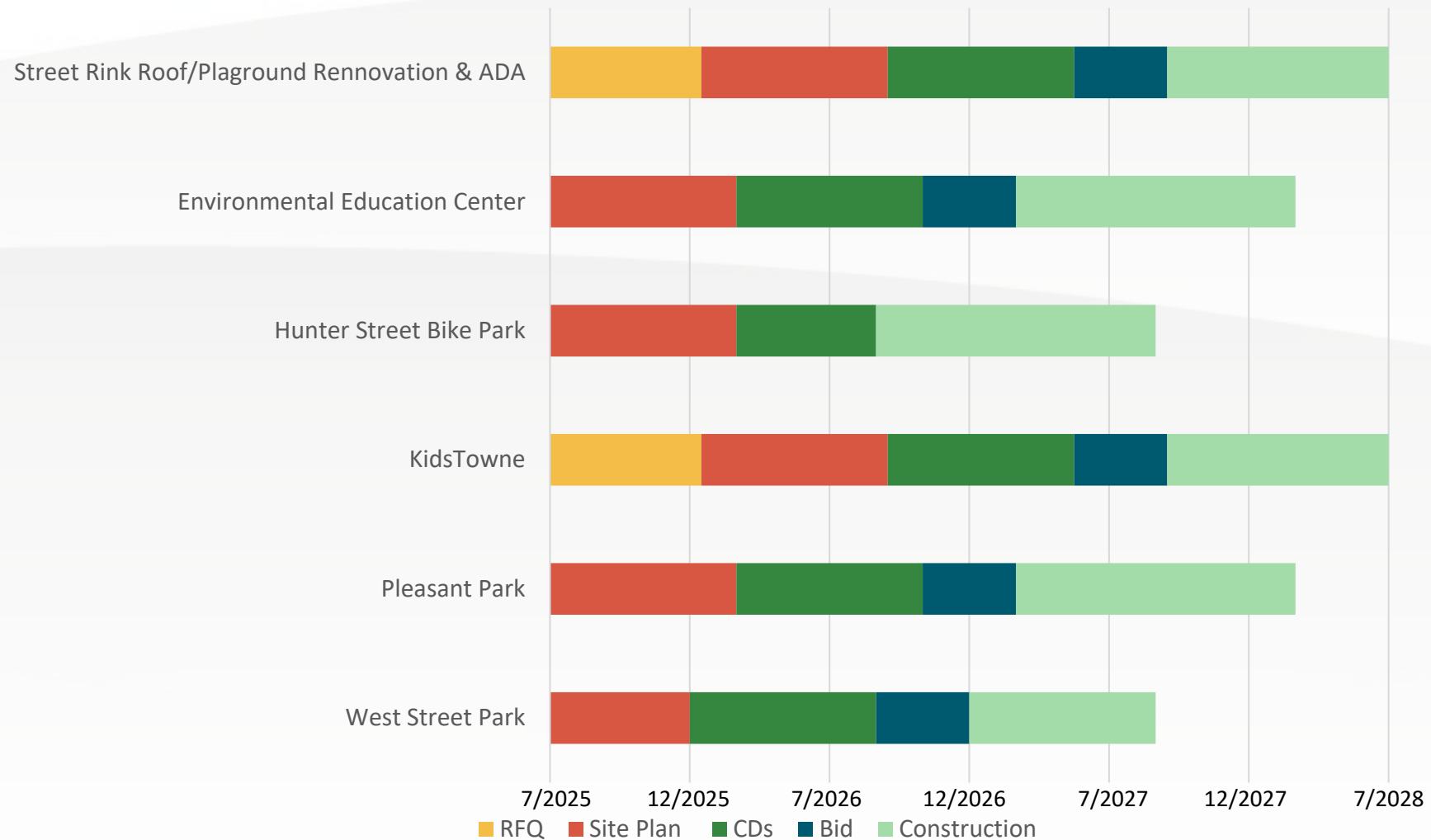


February 13th, 2025  
**Parks Capital Project Prioritization**  
Park Planning



# Timeline: Park Planning Projects

CIP Project Scope





# Wimberly Road Parkland

- Master Plan Priorities
  - Implementation + Action Plan
    - Expand 1.2 Recreation Offerings
    - Experience 2.2 Sense of Community
- Estimated Cost
  - Design: \$2M
  - Construction \$95.2M
- Estimated Recurring Operating Costs
  - Staff & Equipment \$1.9M



A Welcoming  
Community



High Performing  
Government



Environmental  
Leadership



Responsible  
Development



Economic  
Vitality





# Veridea Parkland Development

- Master Plan Priorities
  - Implementation + Action Plan
    - Expand 1.2 Recreation Offerings
    - Experience 2.2 Sense of Community
- Estimated Capital Cost
  - Design \$2M
  - Construction \$87.5M
- Estimated Recurring Operating Costs
  - Staff & Equipment \$1.9M



A Welcoming  
Community



High Performing  
Government



Environmental  
Leadership



Responsible  
Development



Economic  
Vitality



# Beaver Creek Greenway

- Master Plan Priorities
  - Implementation + Action Plan
    - Expand 1.1 Connectivity: Prioritize interconnected public realm through greenways, bikeways and transportation
- Estimated Capital Cost
  - Feasibility study completed
  - Design \$1.4M
  - Construction \$8.7M
  - Land/ROW Acquisition (Easements) \$260K



A Welcoming  
Community



High Performing  
Government



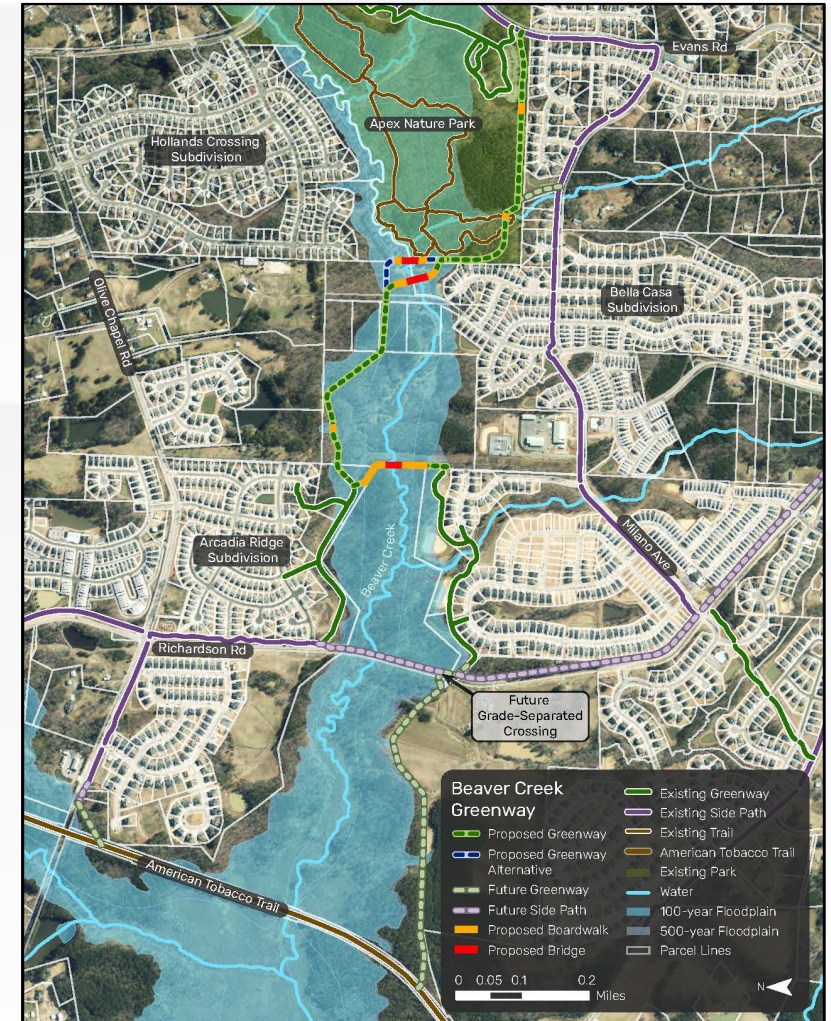
Environmental  
Leadership



Responsible  
Development



Economic  
Vitality





# Middle Creek Greenway

- Master Plan Priorities
  - Implementation + Action Plan
    - Expand 1.1 Connectivity: Prioritize interconnected public realm through greenways, bikeways and transportation
- Estimated Capital Cost  
(Jessie Drive to Ten Ten Rd)
  - Design: \$550K
  - Construction: \$4M
  - Land/ROW Acquisition: \$250K



A Welcoming  
Community



High Performing  
Government



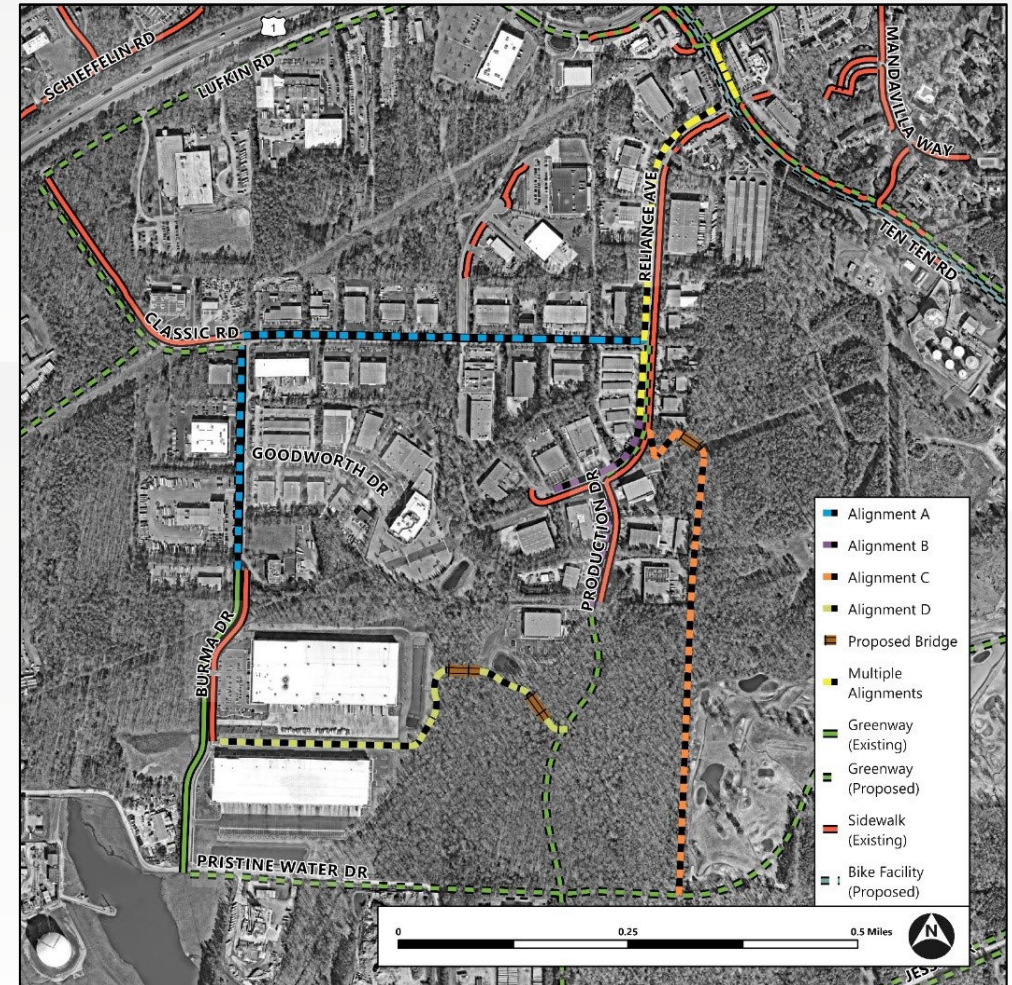
Environmental  
Leadership



Responsible  
Development



Economic  
Vitality





# Reedy Branch Greenway

- Master Plan Priorities
  - Implementation + Action Plan
    - Expand 1.1 Connectivity: Prioritize interconnected public realm through greenways, bikeways and transportation
- Estimated Capital Cost
  - Design: \$450K
  - Construction: \$6.48M
  - Land/ROW Aquisition \$350K



A Welcoming  
Community



High Performing  
Government



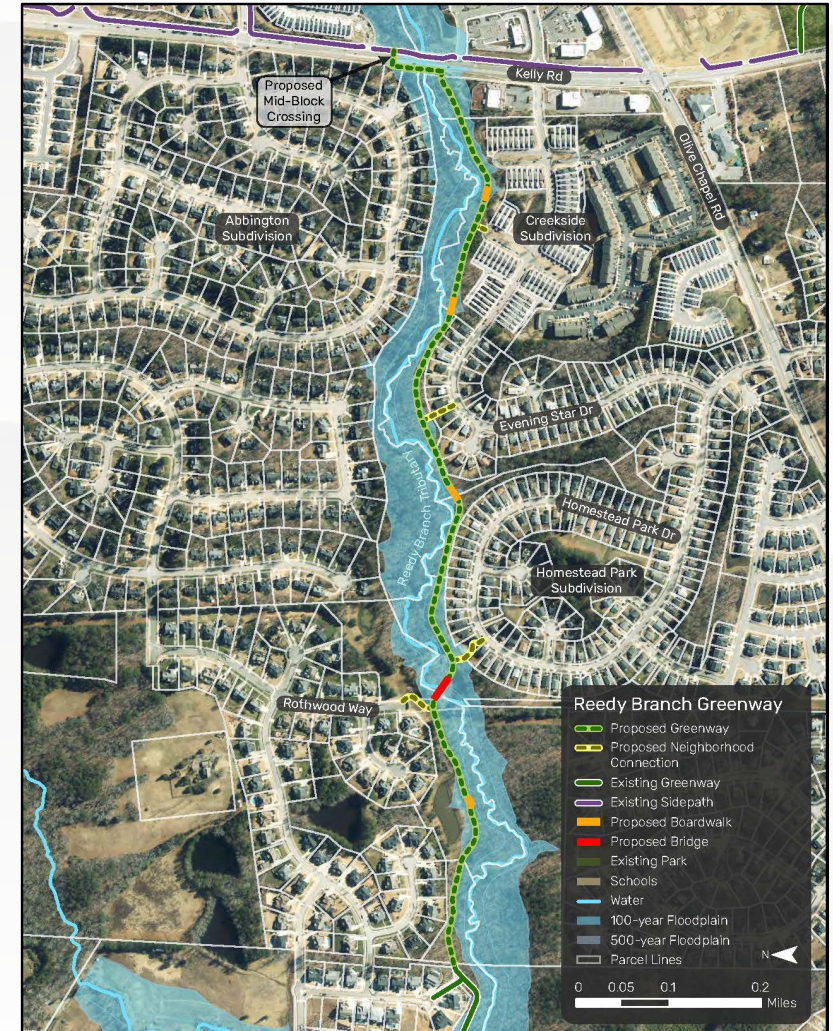
Environmental  
Leadership



Responsible  
Development

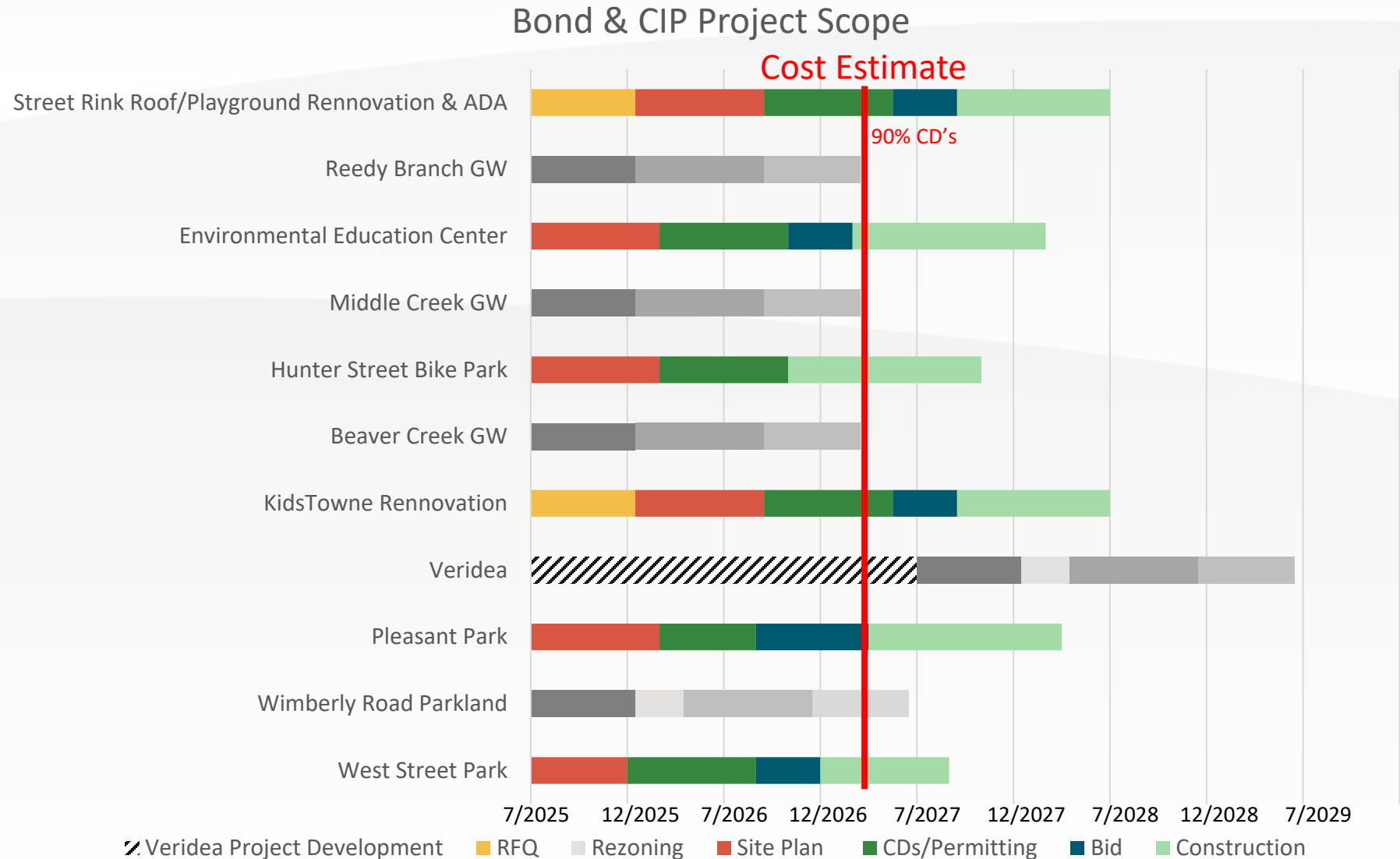


Economic  
Vitality





# Timeline: CIP Funded Projects & PRCR Prioritized Potential Bond Projects







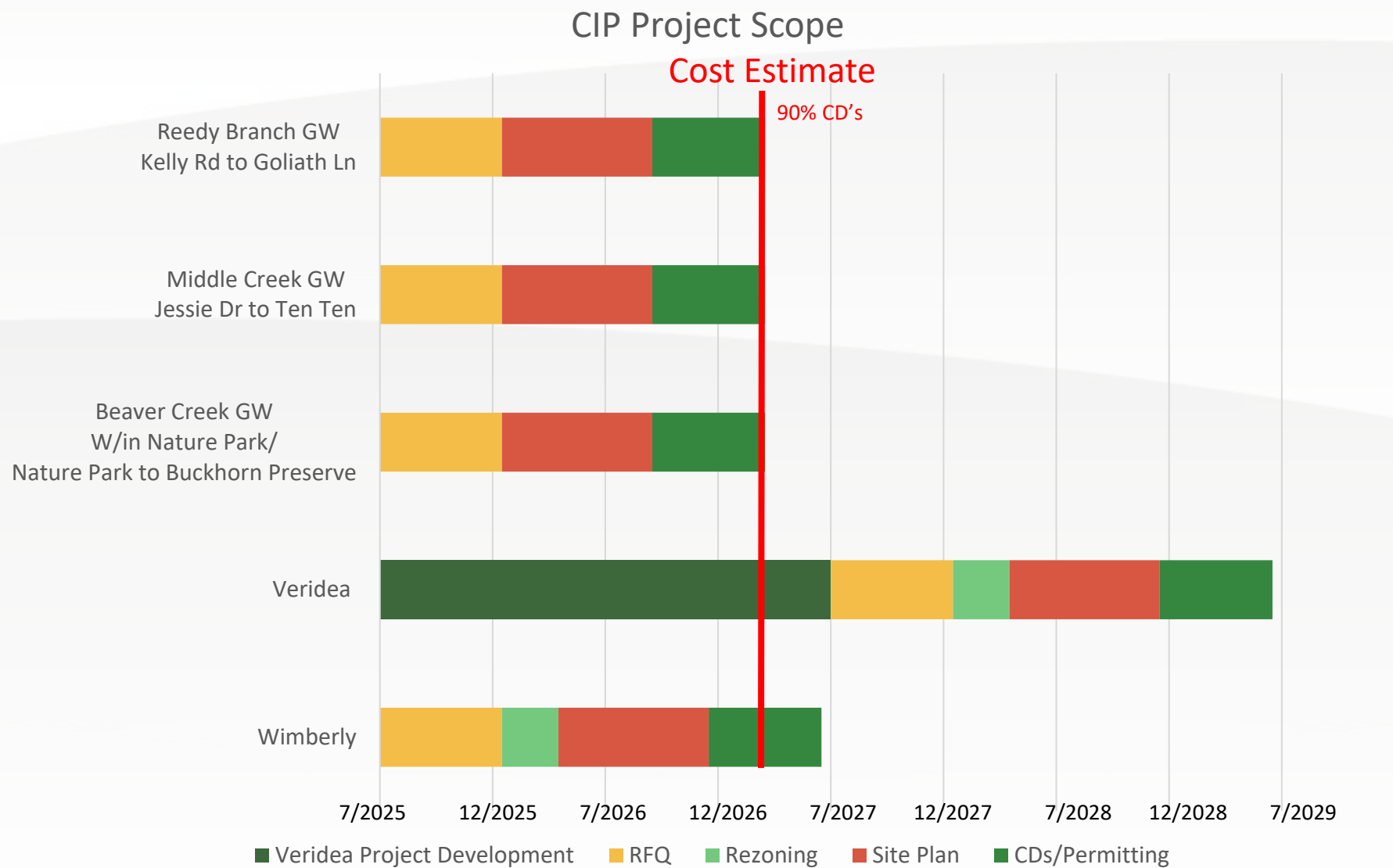
# Combined Costs: Potential PRCR Prioritized Bond Projects

## \$206,030,000 Capital Investment

- Wimberly Rd Parkland (\$97.1M)
  - Construction \$95.2M - Staff & Equipment \$1.9M
- Veridea Parkland (\$88.9M)
  - Construction \$87.5M - Staff & Equipment \$1.9M
- Beaver Creek Greenway (\$8.96M)
  - Construction \$8.7M - Land/ROW Acquisition (Easements) \$260K
- Middle Creek Greenway (\$4.24M)
  - Construction: \$4M - Land/ROW Acquisition (Easements) \$250K
- Reedy Branch Greenway (\$6.83M)
  - Construction: \$6.48M - Land/ROW Acquisition (Easements) \$350K



# Timeline: PRCR Prioritized Potential Bond Projects







# Parks Planning Team Staff Workload

- **\$10 Million** Active Grant Awards
- **523** TRC Project Reviews  
(6-Month Period Starting July 1, 2024)
- **370** TRC Plat Reviews  
(6-Month Period Starting July 1, 2024)
- GIS/ Mapping & Benchmarking
- **189 hours** Contract Management
- Fee Study (Land Dedication)
- Standard Specifications & Details
- Public Engagement
- **\$1,947,870.10** Invoiced to Date FY 24-25 (July 1, 2024, to Jan 31, 2025)
- **362 hours** Construction Field Supervision
- Agendas/ Presentations/ Community Groups/ Publications/ Notices
- Resident Requests/ Project Updates
- Committees – Transit/ Special Project Teams/ TRC/ Advisory Commission
- Regional/ State Trails Planning
- Fee Study (Rental & Recreation Program)





# Questions



# Park Project: Apex Community Park Roof + Playground

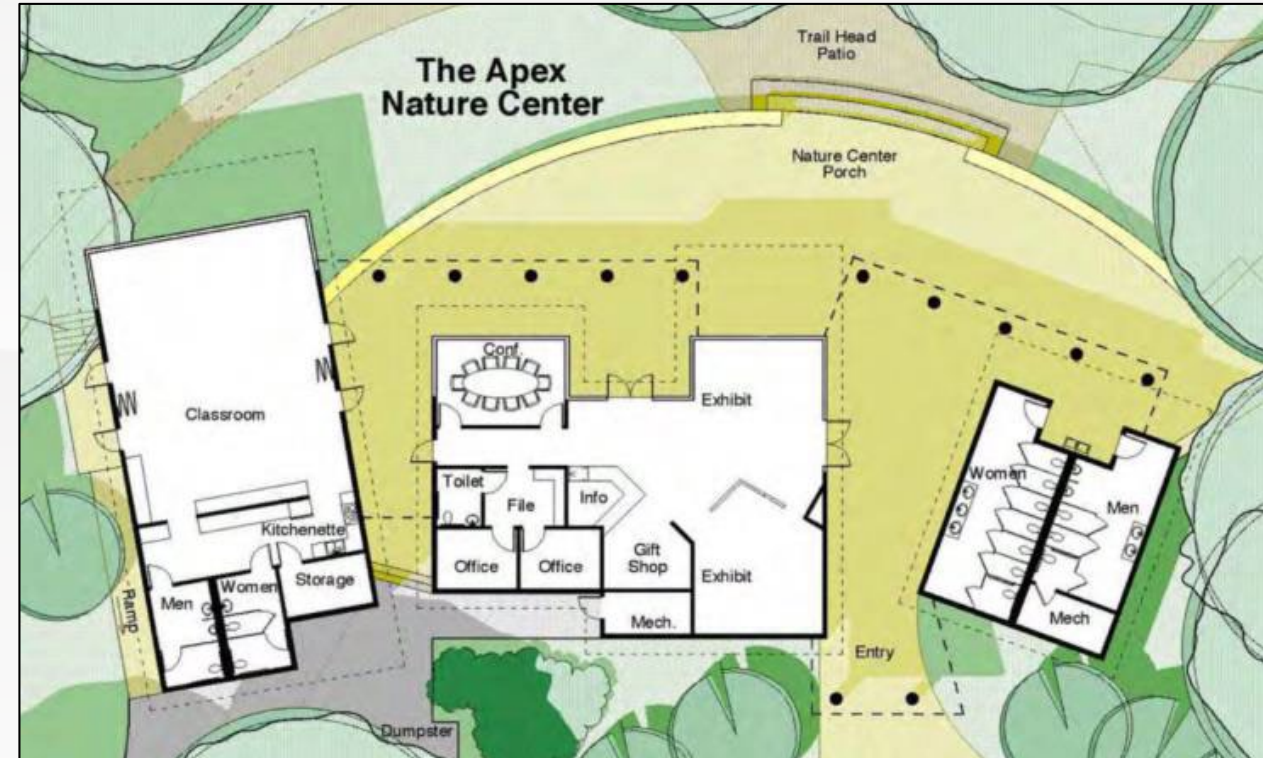
- Master Plan Priorities
  - Implementation + Action Plan
    - Expand 1.2.4 Invest in existing Parks and facilities
- Estimated Capital Cost
  - Design \$150K
  - Construction \$1.8M
- Estimated Recurring Operating Costs
  - Staff & Equipment \$30K





# Park Project: Environmental Education Center

- Master Plan Priorities
  - Implementation + Action Plan
    - Expand 1.2 Recreation Offerings
    - Experience 2.2 Sense of Community
    - Expand 1.2.4 Invest in existing Parks and facilities
- Estimated Capital Cost
  - Public Engagement underway
  - Construction \$8.5M
- Estimated Recurring Operating Costs
  - Staff, Maintenance & Equipment \$1M





# Park Project: Hunter Street Bike Park

- Master Plan Priorities
  - Implementation + Action Plan
    - Expand 1.2 Recreation Offerings
    - Experience 2.2 Sense of Community
    - Expand 1.2.4 Invest in existing Parks and facilities
- Estimated Capital Cost
  - Construction \$300K
- Estimated Recurring Operational Costs
  - Staff, Maintenance & Equipment \$2K





# Park Project: KidsTowne

- Master Plan Priorities
  - Implementation + Action Plan
    - Expand 1.2.4 Invest in existing Parks and facilities
- Estimated Capital Cost
  - Funded Design \$250K (RFQ 2025)
  - Construction \$3.4M





# Park Project: Hunter Street Park Renovation

- Master Plan Priorities
  - Implementation + Action Plan
    - Expand 1.2.4 Invest in existing Parks and facilities
- Estimated Cost
  - Design \$225K
  - Construction \$1.1M





# Park Project: Pleasant Park

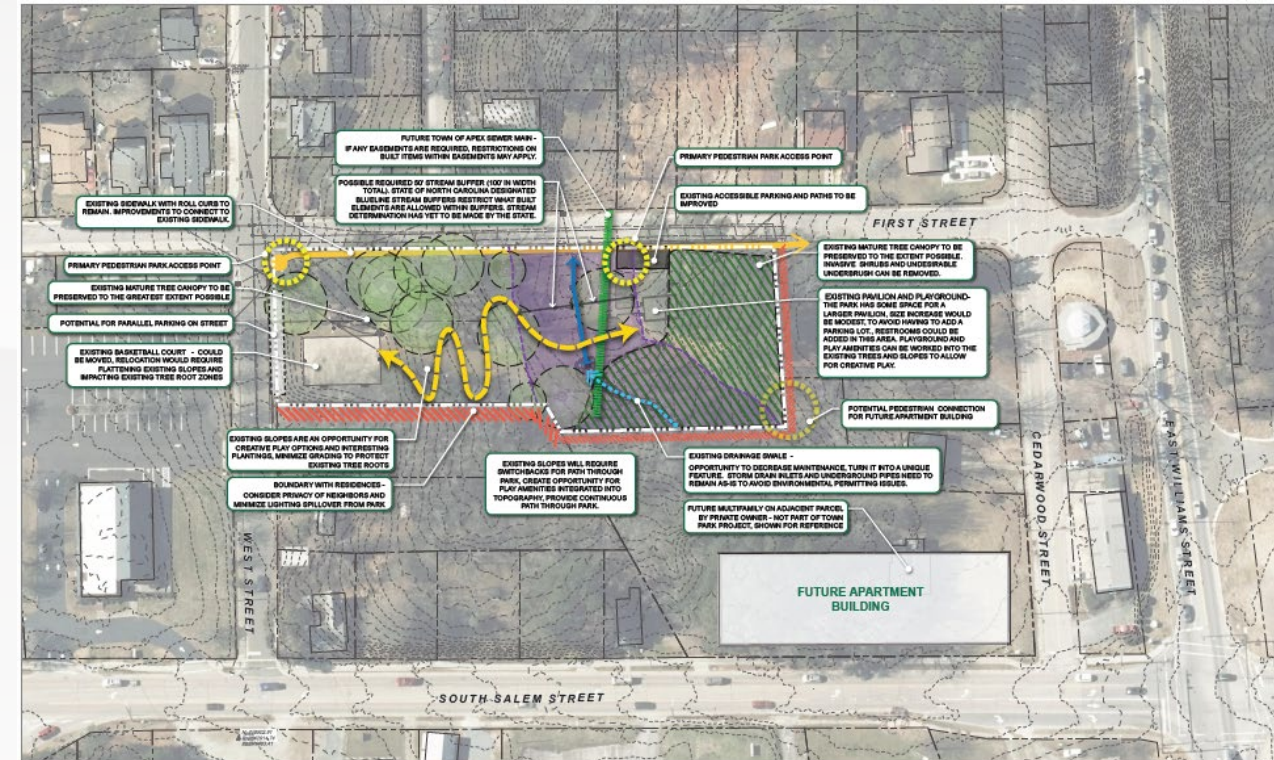
- Master Plan Priorities
  - Implementation + Action Plan
    - Expand 1.2 Recreation Offerings
    - Experience 2.2 Sense of Community
- Estimated Capital Cost
  - Funded
- Estimated Recurring Operating Costs
  - Staff, Maintenance & Equipment \$500K





# Park Project: West Street Park

- Master Plan Priorities
  - Implementation + Action Plan
    - Expand 1.2 Recreation Offerings
    - Experience 2.2 Sense of Community
- Estimated Capital Cost
  - Funded
- Estimated Recurring Operating Costs
  - Staff, Maintenance & Equipment \$6K



## WEST STREET PARK

APEX, NORTH CAROLINA | OPPORTUNITIES & CONSTRAINTS MAP | NOVEMBER 2024