



Town Council Retreat Day One

February 15, 2024 | 8:30 AM – 5:00 PM
Apex Town Hall | 73 Hunter Street, Apex, NC
3rd Floor Training Rooms A and B

- | | |
|--|-----------------|
| I. Breakfast / Agenda Review | 8:30 AM |
| <i>Open Discussion / Mayor Jacques K. Gilbert</i> | |
| II. Motivation Coach* | 8:40 AM |
| <i>Glenis Redmond, City of Greenville S.C. Poet Laureate</i> | |
| III. Team Building Activity – Council* | 9:00 AM |
| <i>Steven Maye, Sr. Consultant, Maxwell Leadership</i> | |
| IV. Break – 10 Minutes | 10:50 AM |
| V. Parks, Recreation, and Cultural Resources
Projects and Programming Updates | 11:00 AM |
| <i>Angela Reincke, Parks Planning Project Manager</i>
<i>Patrick Fitzsimons, Pleasant Park Manager</i>
<i>Elizabeth Shoaf, Recreation Program Supervisor</i> | |
| VI. Lunch | 12:00 PM |
| VII. Workplace Check-Up High-Level Overview | 1:00 PM |
| <i>Leisha Dehart-Davis, Professor of Public Administration</i>
<i>University of North Carolina at Chapel Hill</i> | |

Please refer to photo and biography page



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- | | |
|---|----------------|
| VIII. Break – 15 Minutes | 1:45 PM |
| IX. Diversity, Equity, and Inclusion (DEI) Training
<i>Celeste Sherer, DEI Coordinator</i>
<i>Linda Graham Jones, DEI Director</i> | 2:00 PM |
| X. Language Access Plan Update
<i>Linda Graham Jones, DEI Director</i>
<i>Celeste Sherer, DEI Coordinator</i> | 3:30 PM |
| XI. Affordable Housing Report
<i>Michael Linsenmeyer, Senior Housing Specialist</i> | 3:45 pm |
| XII. Review Day 2 Agenda
<i>Shawn Purvis, Interim Town Manager</i> | 4:30 PM |
| XIII. Wrap-up and Adjournment
<i>Mayor Jacques K. Gilbert</i> | 4:40 pm |

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 or (phone) 919-249-1260.

Please refer to photo and biography page

TOWN OF APEX

The Peak of Good Living

PO Box 250 Apex, NC 27502 | (919) 249-3400 | www.apexnc.org

PHOTOS and BIOGRAPHIES

Apex Town Council | Retreat



Glenis Redmond is the First Poet Laureate of Greenville, South Carolina. She is a 2023 Poet Laureate Fellow selected by the American Academy of Poets. Glenis has published six books of poetry. Her latest books are *The Listening Skin* (Four Way Books), *Praise Songs for Dave the Potter*, *Art by Jonathan Green*, and *Poetry by Glenis Redmond* (University of Georgia Press). Glenis received the highest arts award in South Carolina, the Governor's Award, and was inducted into the South Carolina Academy of Authors in 2022. *The Listening Skin* was shortlisted for the Open Pen America and Julie Suk awards. Glenis has performed nationally and internationally from Hawaii to Haiti. She has toured in England: London, Liverpool and Luton. She speaks for the U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA) US. She has presented in Muscat, Oman in 2016 and for students in Guatemala and El Salvador virtually for Juneteenth in 2023. Glenis is a mother of twin daughters, Amber and Celeste. She is a Grandmother (Gaga) to Julian, Paisley, and Quinn. Glenis believes poetry is the mouth that speaks when all other mouths are silent

PHOTOS and BIOGRAPHIES

Apex Town Council | Retreat



Steven Maye is a person who works to solve problems, add value and serve well. Over the years, I've served in hospitality, service, and sales. The time spent in those industries helped me hone my leadership, communication, and interpersonal skills.

In 2019, I had the opportunity to join Maxwell Leadership which is an organization that focuses on values-based leadership. Over the last 5 years, my focus has been on helping organizations and individuals realize and achieve their full potential. This has become my calling as well as my passion.

I'm a product of the Apex school system, attending Apex elementary, middle and high school. It was at Apex High School that I met my Wife Tiffany and we have been married for 18 years. I'm blessed with two Children Zoe and Steven Jr.

PHOTOS and BIOGRAPHIES

Apex Town Council | Retreat



Leisha DeHart-Davis is a professor of public administration and government at the School of Government. Her applied research focuses on workplace climate in local government organizations. DeHart-Davis's academic research addresses public sector organizational behavior, most recently, employee voice, organizational structure, and citizen and workplace incivility.

She is a faculty member in the School's Master of Public Administration program and directs the Local Government Workplaces Initiative, a research program that conducts workplace climate and employee engagement research to help local governments create great workplaces.

DeHart-Davis is a National Academy of Public Administration Fellow and recipient of the 2019 Gary Cornia Distinguished Lecturer given by the Romney Institute of Brigham Young University. She has published two books, the award-winning *Creating Effective Rules in Public Sector Organizations* and *Understanding Gender Imbalance in Public Sector Leadership*. Her research has also been published in the *Journal of Public Administration Research and Theory*, *Public Administration Review*, *International Public Management Journal*, *Administration and Society*, and *Review of Public Personnel Administration*.

DeHart-Davis is past-president of the Public Management Research Association and a UNC Thorp Faculty Engaged Scholar. She holds a Ph.D. in public policy from the Georgia Institute of Technology.

Project Updates Feb 2024

Parks, Recreation, and Cultural Resources

February 9, 2024



In The Works

Beaver Creek Greenway



Standard boardwalk design - 80% of corridor



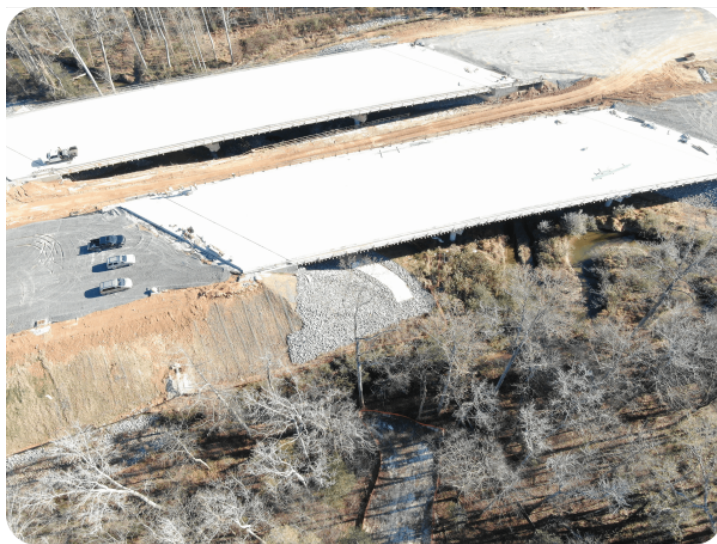
View of corridor east towards Kelly Road bridge



View of completed crossing under Apex BBQ bridge



Middle Creek Greenway



Looking north to NC-540 greenway



ground view north to NC-540 bridge and unsuitable soils



Esri, NASA, NGA, USGS, FEMA | Esri Community Maps Contributors, Tow...

200 ft

Powered by Esri

Apex West Greenway



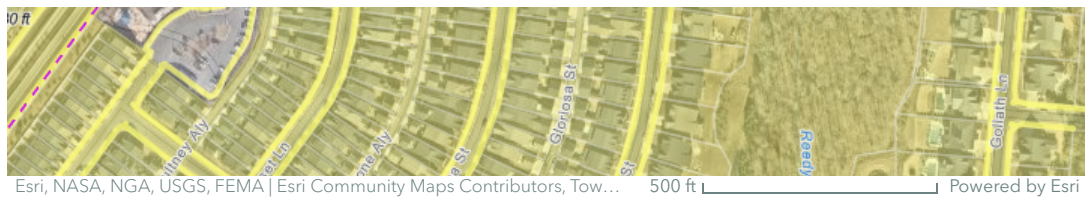
Corridor clearing towards ATT connection



Connectivity to existing side path along south side of Olive Chapel Road



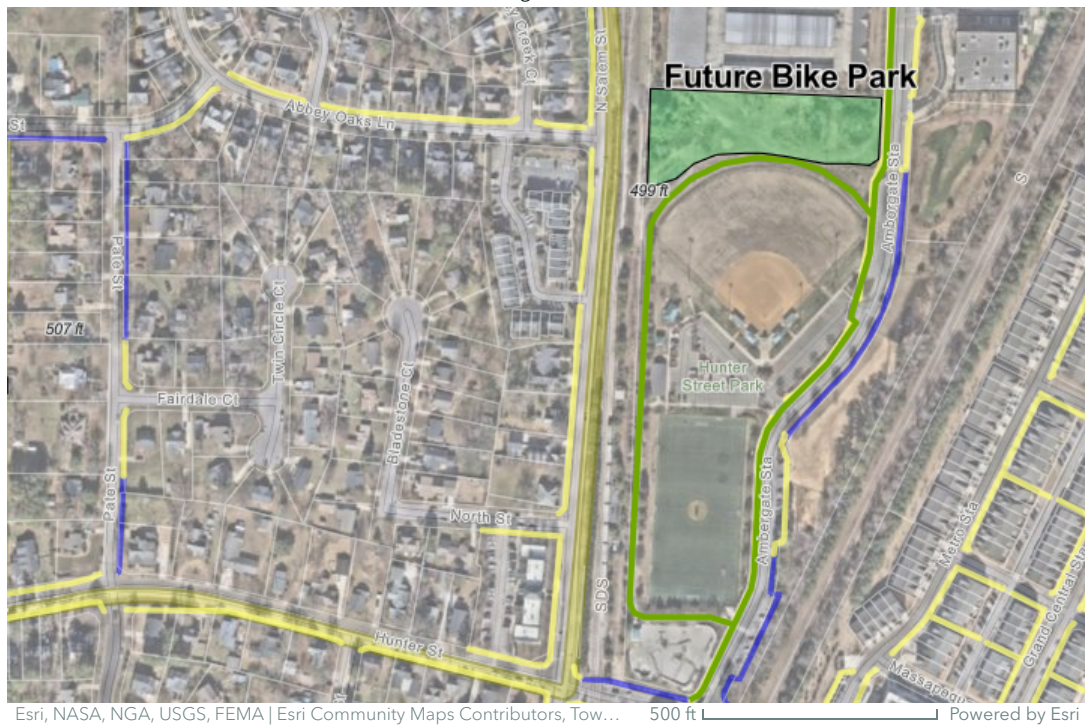
Upcoming Projects



Reedy Branch Greenway



Boardwalk crossing of creek to be installed



Hunter Street Bike Park



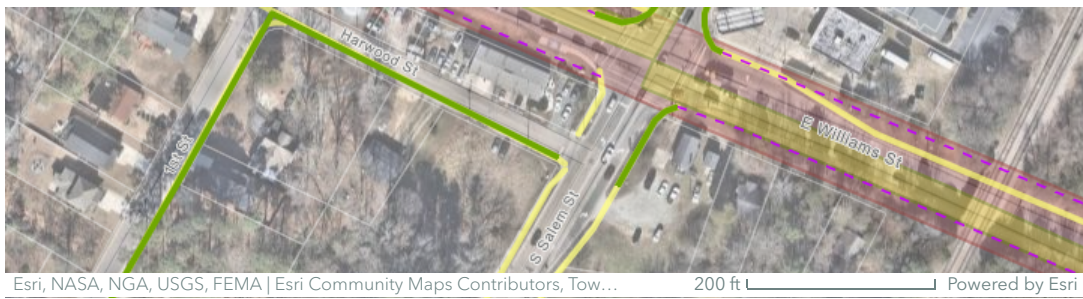
Existing Conditions



Concepts



Components and Materials



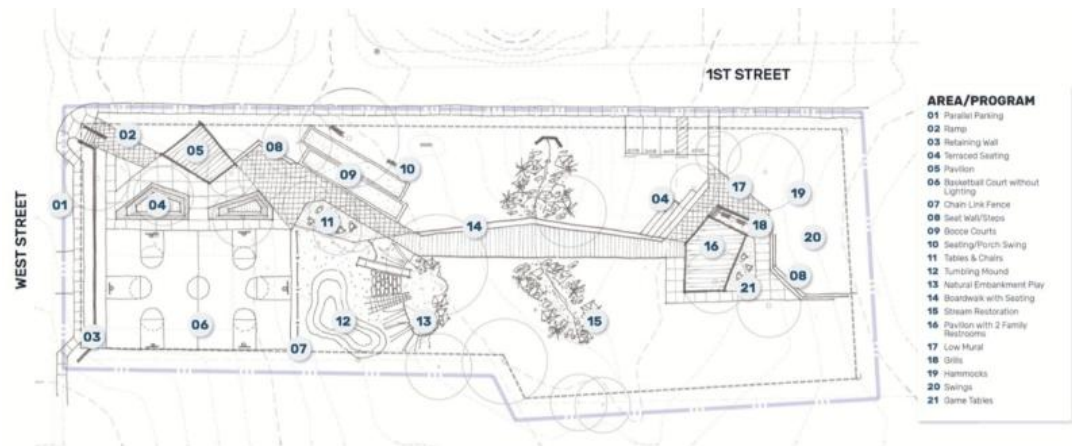
West Street Park



Current Site Conditions



Current Site Conditions - Basketball Court



West Street Park concepts could include basketball, swing sets, game tables, and other mixtures of passive and active space.



Projects Opened

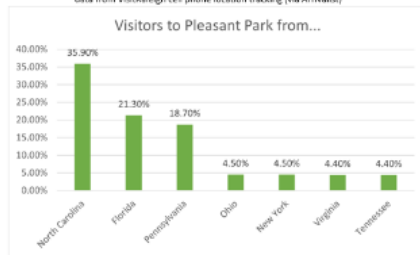
PLEASANT PARK VISITORS

- **Vehicle Counts**
 - November: 64,917
 - December: 38,089
 - January: 36,118
- On pace for over **2 million visitors** in the first year of operation



PLEASANT PARK EVENTS

- **5 Tournaments**
 - \$43,300 in rental revenue
 - \$3,000 in concession stand revenue
- **Visitor Origin Estimates**
 - 70% Local (within 50 miles)
 - 30% Travelers (50+ miles)
- **Economic Impact**
 - 74.9% of visitors spent at least one night in the area
 - Average stay was 3.2 nights



PLEASANT PARK^{NEW} PROGRAMMING

- Additional teams for youth soccer leagues
- New youth flag football
- Summer and track out camps



PLEASANT PARK^{FIELD} RENTALS

- In the first 6 months of operation, more than 2,500 total hours of field space will be rented, resulting in more than \$200,000 in revenue
- Sports include:
 - Soccer
 - Lacrosse (Boys & Girls)
 - Ultimate Frisbee
 - Gaelic Sports
 - Flag Football
 - Cricket
 - Rugby
 - Kickball





Happening Now

Day Camps

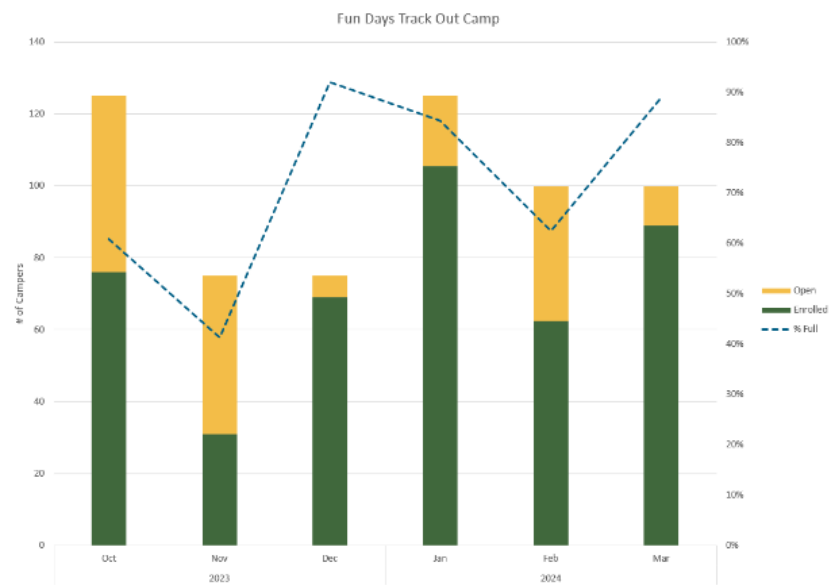
TRACK OUT WHAT'S NEW

- 25 campers weekly
- 10.5 hours daily (7:30am – 6pm)
- Full-Time dedicated team
- Field trips on buses & on foot
- Standardized curriculums



PRCRBUSES

- Track Out, Summer Camp, Senior & Special Recreation Programs
 - Camp Trips:
 - Bowling
 - Treasure Quest
 - NC eSports Academy
 - NC Arboretum
 - Durham Scrap Exchange
 - Apex Parks & more!
- Christmas Parade + Carpool Karaoke
- Specialized Recreation



ENROLLMENT BY THE NUMBERS

- Late to advertise in 2023 due to budget approval process
 - Wake County Community Fliers
 - APRCR Facebook
 - Yard Signs at Parks
 - Fliers
 - Mass Emails
- Steadily and consistently increasing in registrations
 - 5 weeks in Spring on waitlists
- Tracks 1, 3 and 4 are largest Tracks
 - November and February largely Track 2 = decrease in enrollments



APEX YOUTH COUNCIL



2021-2022 School Year

88 Members

Total Hours Served: 379

2022-2023 School Year

- 136 Applications
- 120 Paid Members

All Members = 25 Hour Goal

- 14 High Schools
- 10 Middle Schools

Total Hours Served: 2,413.75

2023-2024 Current School Year

- 283 Applications
- *No Membership Fee Required*
- 140 Members - Lottery System
- High School: 20 Hour Requirement
- Middle School: 15 Hour Requirement
- 13 High Schools & 11 Middle Schools

Total Hours Served(to date): 1,206



APEX
PARKS, RECREATION &
CULTURAL RESOURCES



Local Government
Workplaces Initiative



UNC

SCHOOL OF
GOVERNMENT

Town of Apex 2023 Workplace Climate Survey Preliminary Results



Overview

- Survey Process Refresh
- Highlights, Growth Areas, Mixed Results
- Broad Qualitative Themes



Survey Process Refresh

Survey Process Refresh

- Survey ran from three weeks, 10/30 to 11/17
- Eight* meetings with employees, including police, electric, online and in-person
- 150 randomly selected survey participants received \$50 gift card
- 70% response rate



2023 Town of Apex Workplace Checkup	Response Rate
Administration	96%
Electric	73%
Finance	86%
Fire & Rescue	51%
Inspections	89%
Internal Services (HR, IT)	81%
Parks, Recreation, & Cultural Resources	78%
Planning	100%
Police	76%
Public Works	49%
Transportation & Infrastructure	70%
Water Resources	53%
Grand Total	70%



Highlights, Growth Areas, Mixed Results

Highlights, Growth Areas and Mixed Results

- Apply to categories of survey questions
- **Highlights** are when all survey items are **good or excellent**
- **Growth areas** are when all survey items have **room for improvement**
- **Mixed results:** when **some** survey items in a category are **good/excellent** and **some** are **room for improvement**





How do we figure out excellent/good or room for improvement?

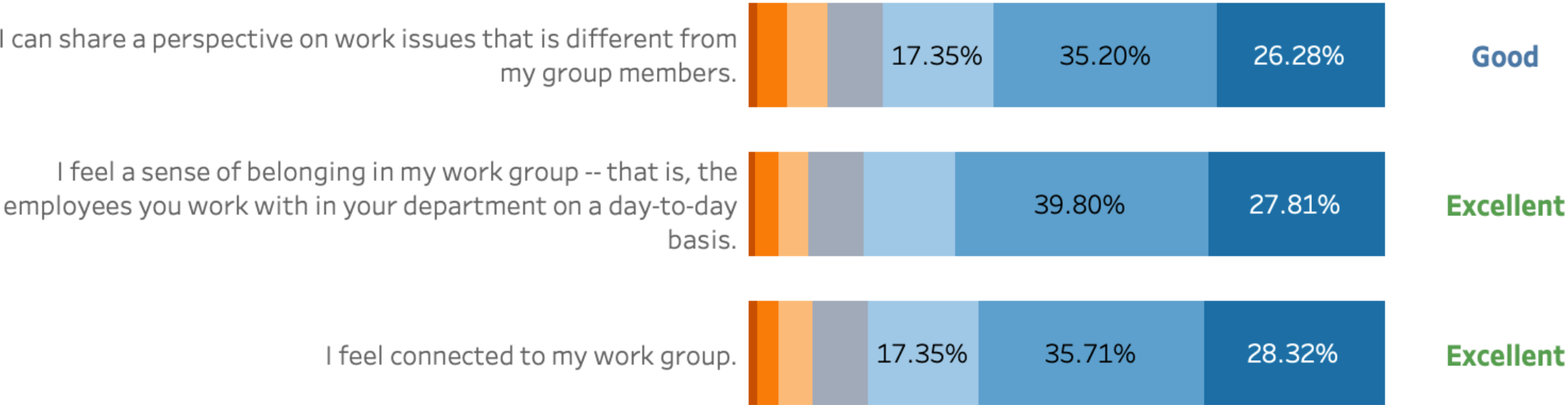
- Excellent/good: high percentage of positive responses and/or low percentage of negative responses
- Room for improvement: Lower percentage of positive responses and higher percentage of negative responses
- High percentage: 80%
- Low percentage: 20%
- Note: Room for improvement just means we didn't see as many positive responses or saw more negative responses than we would like

2023 Town of Apex Workplace Climate Survey Results

Highlights	Growth Areas	Mixed Results (# Positive Items/All Items)
Attitudes Towards Apex Diversity Climate Inclusion Self-Efficacy Supervision	Citizen Incivility Exhaustion Silence Top-Down Decision Making Voice Workplace Incivility	Autonomy (2/4) Commitment (1/3) Communications (2/5) Psychological Safety (1/3) Resources (2/4) Rules (5/6) Satisfaction with Job Rewards (5/6) Social Support (2/3) Teamwork (7/9) Autonomy (2/4) Training (1/3) Work-Life Balance (2/3)

Inclusion

How much do you agree to disagree with the following statements about your workplace?



Responses

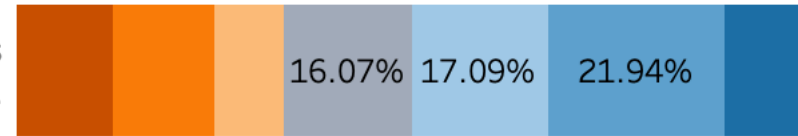


Voice

How much do you agree or disagree with the following statements about employee feedback?

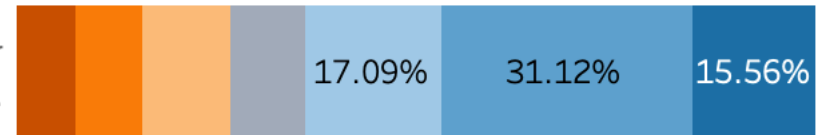
Data Visualization

I am given the chance to contribute to important decisions made about my workplace.



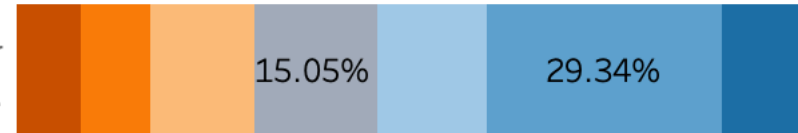
Room For Improvement

I have opportunities to provide my opinion to upper management on workplace issues.



Room For Improvement

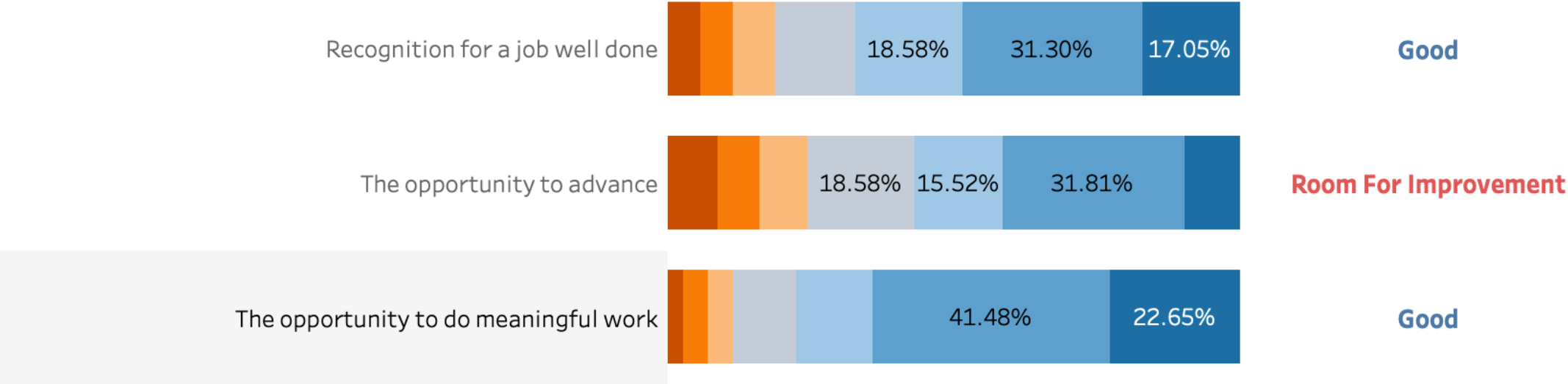
When I provide my opinion on workplace issues, upper management provides a response.



Room For Improvement

Satisfaction 2

How satisfied or dissatisfied are you with the following parts of your job?



Responses



First Reactions

- Five highlights, all good to have
- Eight growth areas: voice & decision making, incivility & exhaustion
- Thirteen mixed results





Broad Qualitative Patterns



Broad Qualitative Patterns

- Remote work & training
- Teamwork needs improvement
- Top-down communications need improvement
- Citizen incivility
- Mix of supervisory experiences, from positive to negative

Broad Qualitative Patterns

- Morale could benefit from better work-life balance, adequate staffing, and clear communication and leadership from management
- Mixed reviews for job rewards, both positive & negative
- Overall positive reviews of Apex, with concerns about town manager search and growth without additional resources





Next Steps

- Analyze departmental results
- Apex Staff
 - Individual meetings with department heads
 - Department meetings with employees



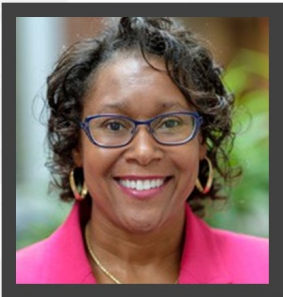
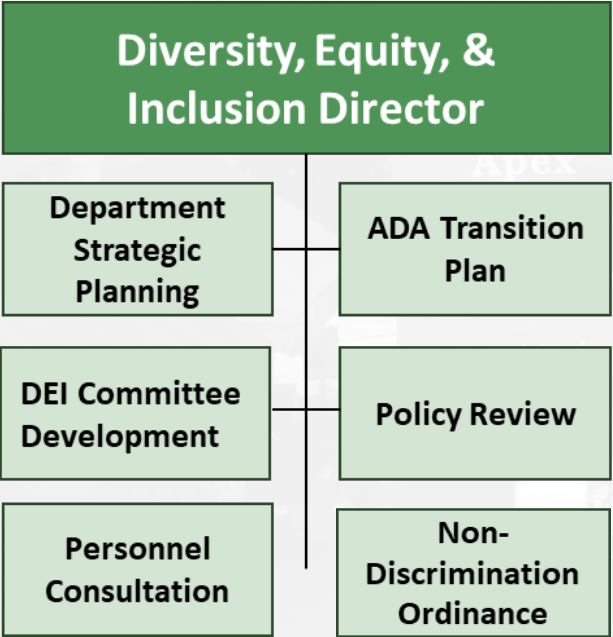
February 15, 2024

Inclusive Leadership

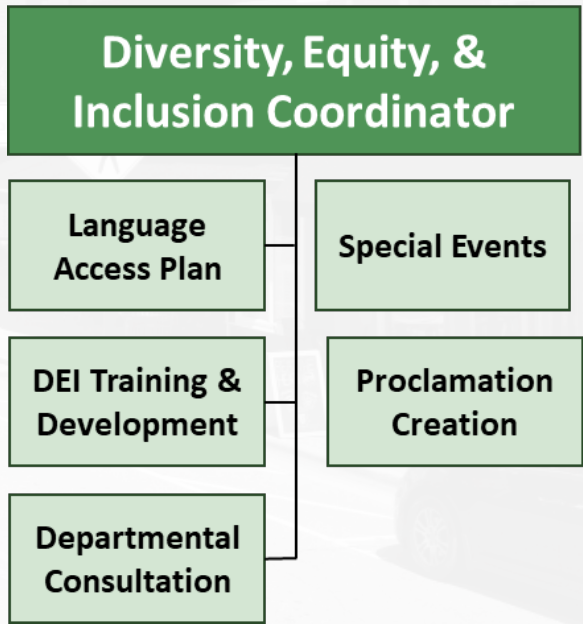
Diversity, Equity, & Inclusion

Purpose Statement: The Diversity, Equity, & Inclusion Department provides consultation and education to ensure a community of belonging, diverse representation among employees, and that residents have equitable access to services.

Linda Graham Jones



Celeste Sherer



What Does Belonging Feel Like?





Diversity Paradox

- **Labels**
 - Divisive or Creating a Shared Language?
- **Inclusive vs. Intrusive**
 - Inviting someone into to the conversation or is it intrusive curiosity?
- **Calling Out vs. Cancelling Out**
 - Accountability or Humiliation?
 - Psychological Safety
- **Representation or Quotas?**
 - Performative or Transformative
- **Curiosity and Boundary Setting**
 - What are the resources?

Origin Story

1. Welcomed vs. Belonging
2. Acknowledging and Recognizing Difference
 - Experiencing the world differently- Identity and Lived experiences
3. My Continued Why



Approach

Strategy: People Centric and Empathy Anchored

Method:

Empowerment Model:

- Centers individuals as the primary drivers of their own process
- Focused on working "with" people
- Places importance on people's preexisting: values, motivations, social connections, and their lived experiences
- Enhancing people's existing knowledge and experiences

Deficit Model : DEI Information deficit

- Place of lack and or corrective action
- Alludes that something is "wrong" with the participant
- Accusatory Language: blame and guilt



DIVERSITY, EQUITY, AND INCLUSION CONCEPTS: Training



Diversity Concept:

Quantifiable representation of difference

- ***Dimensions of diversity*** : there are over 26 characteristics



Equity Concept:

Resources provided so that everyone is successful

- *Equity vs. Equality*



Inclusion Concept:

Qualitative experience of difference



Everyday acts of Equity

Workplace:

- What do employees need to do their best work of their careers?
- Are we proactively looking for burn out and stress?

Community:

- How to make the Town of Apex work for **everyone?**
- What do residents need for Apex to be and remain the "Peak of Good Living"?

“Every day acts of equity, they are not soft skills they are leadership skills!”

-Minda Harts






Practical Strategies to Cultivate an Inclusive Culture

1. Confront Individual Bias

- Self Awareness is needed:
- You have to understand yourself before you can coach and lead others

2. Authenticity

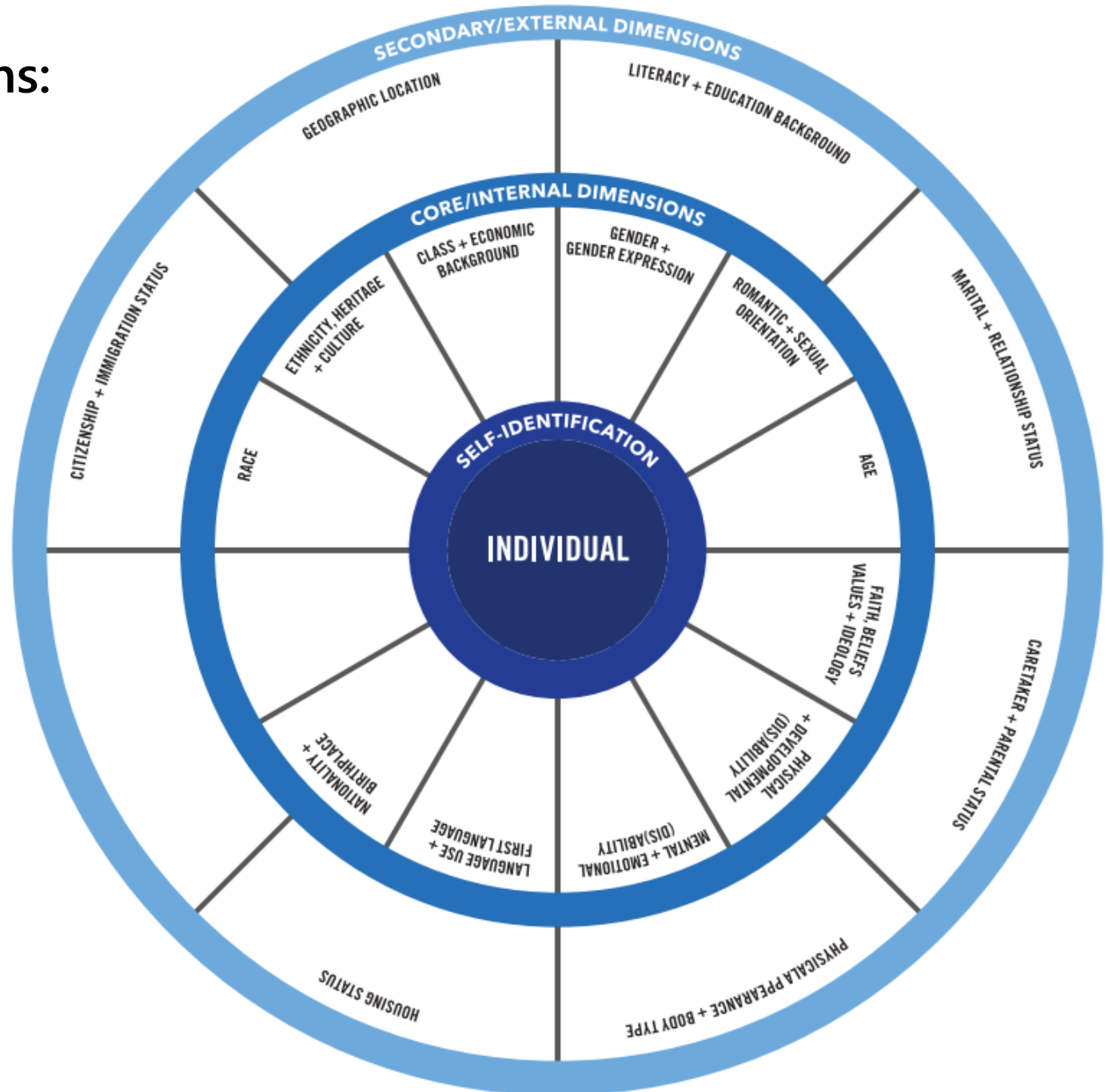
- Modeling the Behavior
- 

Defining Your Lens

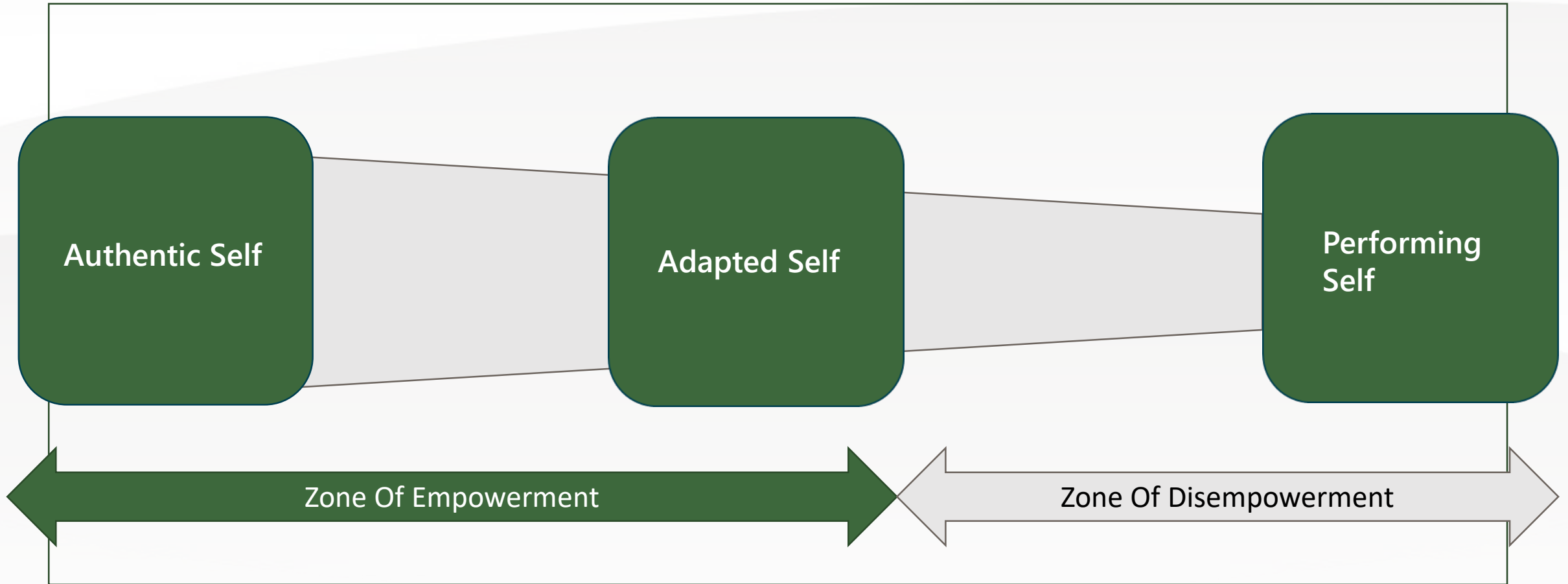


Consider the Following Questions:

1. Which identities do you think about most often?
2. Which identities have the strongest effect on how you perceive yourself?
3. Which identities have the greatest effect on how others perceive you?




The Three Selves Continuum





Three Selves Concept

- 1. Your Authentic Self:** Who you would choose to be if there were no consequences for your actions. This self reflects:
 - Core Values
 - Needs
 - Thoughts Emotions
 - 2. Your Adapted Self:** Who are you when you willingly choose to alter your behavior from how your Authentic Self would act.
 - Exercising choice to adapt your behavior in order to serve your own needs and the needs of others
 - 3. Your Performing Self:** Who you show up as when you feel like you can't be yourself and don't have a choice but to conform or mask.
 - This is the curated life that you project
 - Constructed Persona
 - Aware or unaware masking/conforming in order to protect what you perceive would be the negative consequences of being yourself.
- 

When Do Unconscious Biases Occur?

"If you have a brain, you have a bias!"

At any given moment, our brains process a staggering 11,000,000 bits of information, yet our conscious mind can only handle 50 bits per second. The gap between these two figures is the realm where unconscious bias resides.

Our brains utilize bias as a protective mechanism, serving to keep us safe from physical harm and manage the overwhelming influx of information processed at any given moment. But, what if the very mechanism that safeguards us also has the potential to foster social stereotypes, laying the groundwork for detrimental institutional culture and decisions?





How Bias Can Show up

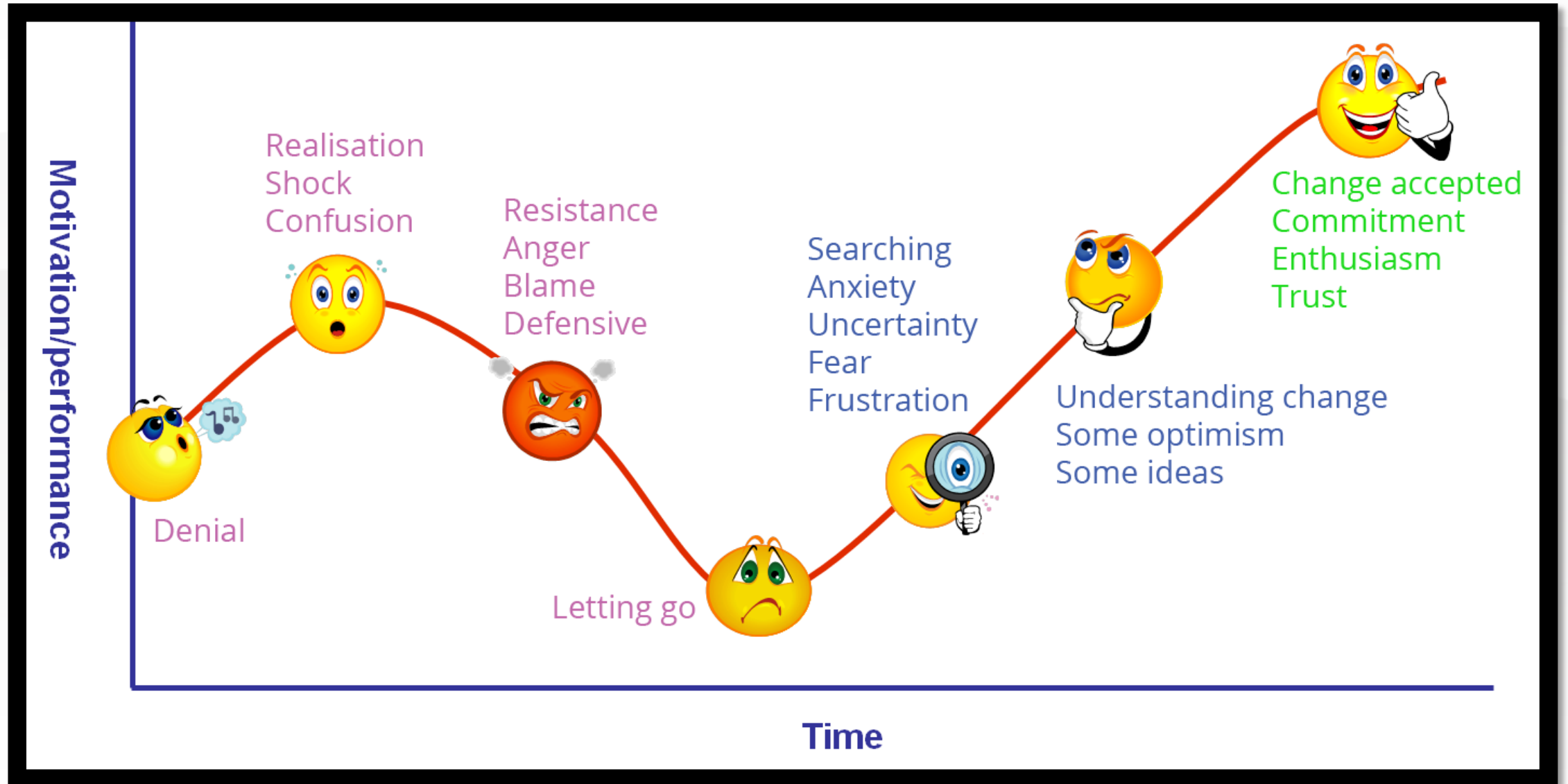
Explicit Bias: attitudes and beliefs we have about a person on a conscious level

Unconscious/ Implicit Bias: unintended, subtle and subconscious thoughts that happen to all of us, all of the time.

Unconscious Bias: happens automatically and are triggered by our brain making quick judgments and opinions of people and or situations . They occur when your preferences towards or against something impacts your actions.

1. Similarity: The tendency to view people who look or think like us more favorably than people who are different
2. Expedience: The tendency to rush to conclusions in an effort to minimize cognitive effort. The need for speed
3. Experience: The tendency to believe that how we see the world is inherently truer than someone else's perspective
4. Distance: The tendency to assign greater value to those things that we perceive to be closer to us, rather than further away
5. Safety: The tendency to over-account for negative outcomes instead of positive ones

Grant Yourself Grace





Reducing Bias in the Workplace

STEPS FOR REDUCING BIAS IN The Workplace

PREPARING FOR THE HIRING PROCESS

1. Create a job description and review it for biased language*

2. ADOPTING INCLUSIVE SCREENING AND INTERVIEW PRACTICES

3. DEBRIEFING AND HIRING THE **BEST CANDIDATE**

Utilizing Score Cards

References

Brown, Jennifer. How to Be an Inclusive Leader: Your Role in Creating Cultures of Belonging Where Everyone Can Thrive. Read How You Want, 2022.

Clark, Timothy R. The 4 Stages of Psychological Safety: Defining the Path to Inclusion and Innovation. Berrett-Koehler Publishers, Inc, 2021.

Flynn, Diane, and Alexandria White.

Fuller, Pamela, et al. The Leader's Guide to Unconscious Bias: How to Reframe Bias, Cultivate Connection, and Create High-Performing Teams. Simon & Schuster Paperbacks, 2023.

Radecki, Dan, and Leonie Hull. Psychological Safety: The Key to Happy, High-Performing People and Teams. Academy of Brain-Based Leadership, 2018.

Sinek, Simon. Leaders Eat Last: Why Some Teams Pull Together and Others Don't. Penguin Business, 2019.

Swart, Tara, et al. Neuroscience for Leadership Harnessing the Brain Gain Advantage. Palgrave Macmillan, 2015.

TULSHYAN, RUCHIKA. Inclusion on Purpose: An Intersectional Approach to Creating a Culture of Belonging at Work. MIT PRESS, 2024.

Bhasin, Ritu. The Authenticity Principle



February 15, 2024

Language Access Collaborative

Town of Apex

Agenda

Town of Apex Language Access Collaborative

- Overview
- Our Team
- Language Access and Legal Requirements
- Timeline & Progress to Date
- Next Steps



Mission

"The Town of Apex is committed to its mission of delivering exceptional public service that fosters opportunities for individuals and the community to live, thrive, and reach their full potential."

To accomplish this mission and achieve the Town's goals of fostering a:



**A Welcoming
Community**



**High
Performing
Government**



**Environmental
Leadership**



**Responsible
Development**



**Economic
Vitality**

Language Access Collaborative Overview:

UNC-Chapel Hill's Institute for the Study of the Americas & the Building Integrated Communities initiative brought together teams of NC local governments & community-based organizations to form the Language Access Collaborative & build bridges of communication.

Collaborative Teams:

- Discuss inclusive practices & policies
- Learn from immigrant leaders & language access practitioners
- Collect community data & conduct agency assessments
- Create language access plans



Inaugural Class of Language Access Collaborative 2023-2024:

Nine local governments partnered with community-based organizations to form teams of Collaborative participants in:

- Apex
- Buncombe
- Concord
- High Point
- Morrisville
- New Hanover
- Raleigh
- Wilmington
- Winston-Salem



Language Access Collaborative Teams

Buncombe County and PODEREmma
City of Concord and El Puente Hispano
City of Raleigh and U.S. Committee for Refugees and Immigrants
City of Wilmington and Coastal Horizons Clínica Latina
New Hanover County and Cape Fear Latinos
Town of Morrisville and Hindi Vikas Mandal
Town of Apex and Fiesta Cristiana Centro de Recursos Familiar
City of High Point and YWCA of High Point
City of Winston-Salem and World Relief of the Triad





Language Access Team

Order from left to right, (Town of Apex, Fiesta Christiana)

Stacie Galloway: *Communications Director, **Susan Clifford, Steffee Bowden:** Administration, **Linda Jones:** Diversity, Equity, & Inclusion Director, **Allen Coleman:** Town Clerk, **Jeannette Casellas:** Family Support Manager, **Celeste Sherer:** Diversity, Equity & Inclusion Coordinator, **Claudia Tsiaousopoulos:** Director of Congregational life*



Más Que Una Iglesia Una Familia



Fiesta Cristiana: Community Partner

Claudia Oviedo

Director of Congregational and Community Life

In 2008, the beginning of one of the most challenging economic times in America, Apex United Methodist Church took a leap of faith, hired Pastor José Luis Villaseñor, and began a Hispanic/Latino ministry. Two years later there was enough support to have weekly Sunday services in Spanish. As the congregation grew, so did the needs of those who were part of the church and community, both physically and spiritually. Informally, Fiesta Cristiana began providing support to the needs of members and neighbors, and within a short time, Fiesta Cristiana established, as part of its key focus areas, the Family Resource Center (known as Family Support Services), which provides food, financial assistance and referral services to families, among others.

What Is Language Access?

- Providing individuals with Limited English Proficiency (LEP)* **reasonable and meaningful access** to the same services as individuals who speak English.
- Refers to the **laws and policies** that guarantee people access to written, verbal, or visual materials or services in their **preferred language**.

Simultaneous Interpreting



Consecutive Interpreting



Written Translations

***Limited English Proficient (LEP)** = speaks English less than “very well.” Instead of **LEP**, we prefer “people who prefer a language other than English (**LOTE**).”

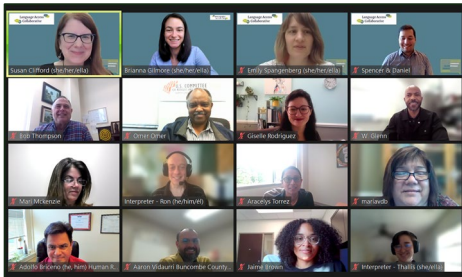
Legal Requirements:

Federal Requirement	Summary of Language Access-related Requirements
Title VI of Civil Rights Act of 1964 and Executive Order 13166 (2000)	Recipients of federal funding: Failure to provide meaningful access to LEP persons can constitute national origin discrimination.
Affordable Care Act (2010) Section 1557	Covered health entities: Must post taglines informing LEP public of availability of free language services in top 15 languages spoken by LEP individuals in the state.
Stafford Act	Emergency management: Administrator of FEMA required to lead efforts to prevent discrimination against LEP individuals in emergency management and assistance.
Americans with Disabilities Act	All federal, state, and local government programs: Requires reasonable steps be taken to offer comparable access for members of public with disabilities to a public entity's services, programs, and activities.
Section 504 of Rehabilitation Act of 1973	Recipients of federal funding: Requires those programs to provide accommodations to people with disabilities when necessary to ensure effective communication.

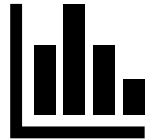
Collaborative Timeline:



Jan- Nov 2023



- Monthly virtual workshops
- Peer exchanges
- Best practice guidance



Spring 2023



- Data collection on languages spoken
- Agency survey
- Community stakeholder input



Summer/Fall 2023



- Analysis & prioritization
- Draft language access policies, procedures, plan, & budget



Jan 2024 – May 2025



- Presentation for approval from leadership
- Implementation of Language Access Plan



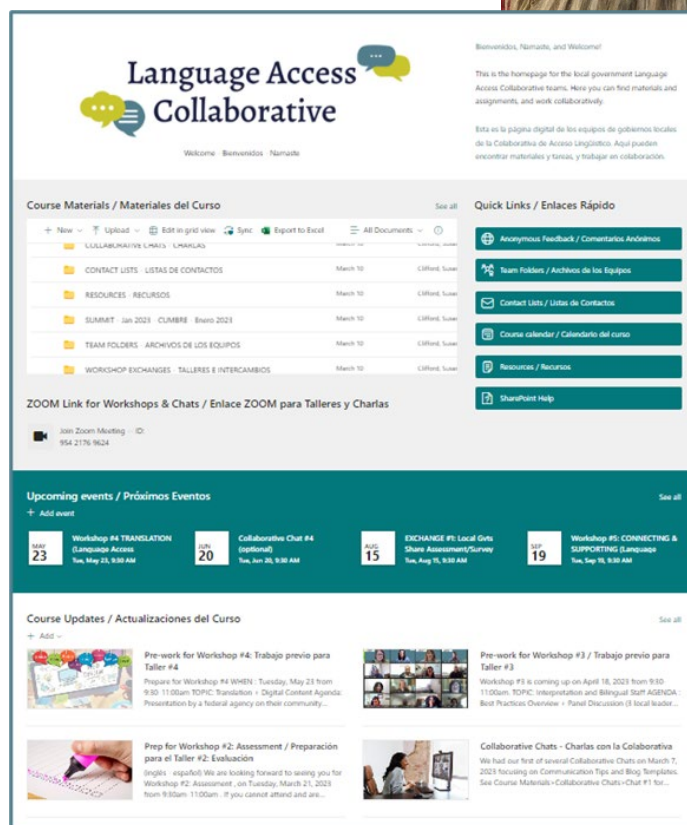
Workshops – COMPLETED:

Presentation Topics:

- ✓ Core concepts & planning resources
- ✓ Title VI & legal requirements
- ✓ Community leader perspectives
- ✓ Data collection & assessment
- ✓ Bilingual staff & interpretation
- ✓ Translation & digital content
- ✓ Relationships
- ✓ Accountability & Sustainability

Supplementary Materials:

- ✓ Tip sheets on language access planning & best practices
- ✓ Survey, interview, & plan templates
- ✓ Analysis & prioritization tools



Special Presentation:
***Michael Mulé, Attorney
with the Dept of Justice,
Civil Rights Division,
Federal Coordination and
Compliance Section***

Apex Progress To Date:

Actions:	Status:
Internal Language Capacity Assessment Survey for All Departments	Developed: April 17, 2023 Deployed: April 18, 2023
First Report and Survey Results Due to BIC	May 16, 2023
Team Meetings with Community Partner	Occurred Monthly
Collaborative Meetings with BIC	Occurred Monthly
Webpage Launched	May 2023
Second Progress Report Due to BIC	August 15, 2023
BIC Visit with Town of Apex and Fiesta Cristiana	October 18, 2023
Draft Plan and Budget Due to BIC	November 17, 2023
Municipal Language Access Network (MLAN) Facilitated from Governor Cooper's Office	Occurs Monthly

Next Steps: Approval and Implementation:

- Language Access Summit – January 19, 2024
- Town Council Meeting – April 23, 2024 (formal presentation and request for approval)
- Implementation Plan – Begin July 2024
- Additional Support:
 - Municipal Language Access Network (MLAN)
 - Welcoming America – Labs, Workshops, Conferences
- Additional Resources:
 - Applying to The Lead for NC Fellow Program thru UNC School of Government
 - Department of Justice (www.usdoj.org)





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Town of Apex Annual Housing Report

Fiscal Year 2022 – 2023
July 1, 2022 – June 30, 2023



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Introduction

The Town of Apex Community Development & Neighborhood Connections Department (CDNC) is pleased to issue the Fiscal Year 2022-23 (July 1, 2022 – June 30, 2023) Annual Housing Report (AHR). The Annual Housing Report provides a community profile that includes key housing affordability data collected from the American Community Survey (ACS), followed by the Town's progress report toward accomplishing the recommendations outlined in the 2021 adopted Apex Affordable Housing Plan (AHP).

The Affordable Housing Plan includes a total of 14 recommendations, one of which is establishing the Housing Advisory Board (HAB). The HAB was established on September 14, 2021, and one of its duties is to assist in the creation of the AHR. The AHR is designed to provide important information and data to Town Council, Town Boards and Committees, Town staff, outside organizations and interested members of the public.

It is in partnership with the HAB and the Apex Planning Department that this FY22-23 Annual Housing Report is submitted to the Town Council by CDNC staff.

Sincerely,

Marla Y. Newman, Director
Community Development & Neighborhood Connections



Introduction

I would like to thank the Housing Advisory Board (HAB) members for the time and effort they volunteered this year to help implement the recommendations of Apex's Affordable Housing Plan. The HAB received strong support in this work from Apex's new Assistant Town Manager Demetria John, the new Community Development and Neighborhood Connections Director Marla Newman, the new Senior Housing Specialist Michael Linsenmeyer and Apex's excellent Planning Department staff under Planning Director Dianne Khin.

Despite the turnover in Town staff, the HAB was able to advance affordable housing initiatives, including the creation of a reasonable starting point for the new Affordable Housing Incentive Zoning Policy. The Town Council unanimously passed the policy on June 27, 2023. I look forward to receiving regular updates on the staff's experience with implementing this policy and related procedures.

Apex has an increasing need for more housing choices, especially for our low-to-moderate income residents and workers. I sincerely appreciate the acute awareness of this need which is shared by Apex's Mayor and Council Members. Their leadership will be critical to acting in creative ways to address this crisis. Action is needed now to truly be The Peak of Good Living for every one of our neighbors and Apex's essential workers who deliver necessary services and would love the opportunity to live closer to their work.

In Service,

Phil Welch, Chair
Apex Housing Advisory Board



Community Profile

Community Profile | Overview

According to the U.S. Census American Community Survey (ACS) 5-Year Estimates for 2017-2021, which was published in December 2022, the population of Apex was 58,066. These 58,066 people are spread amongst 20,434 households, with an average household size of 2.83. Of these households, 74% are homeowners, while 26% are renters. **For current Town population estimates, please refer to the [Town of Apex Development Report](#) (updated monthly).**

Per the ACS, the median income for Town residents is \$121,313. Over 70% of households in the Town make more than \$75,000. Of the households making less than \$75,000:

- 2,423 households (12%) make between \$50K and \$75K
- 1,211 households (6%) make between \$35K and \$50K
- 1,988 households (10%) make under \$35K.

\$121,313

Median Household Income (ACS, 2021)

72%

Percent of Households making over \$75,000
(ACS, 2021)

58,066

Total Population (ACS, 2021)

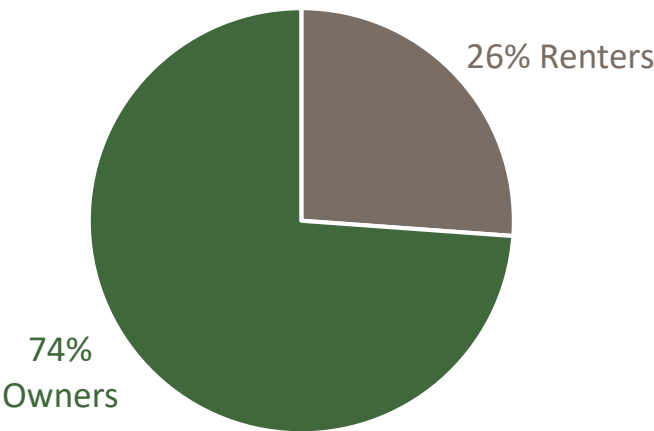
2.83

Average Household Size (ACS, 2021)

20,434

Households (ACS, 2021)

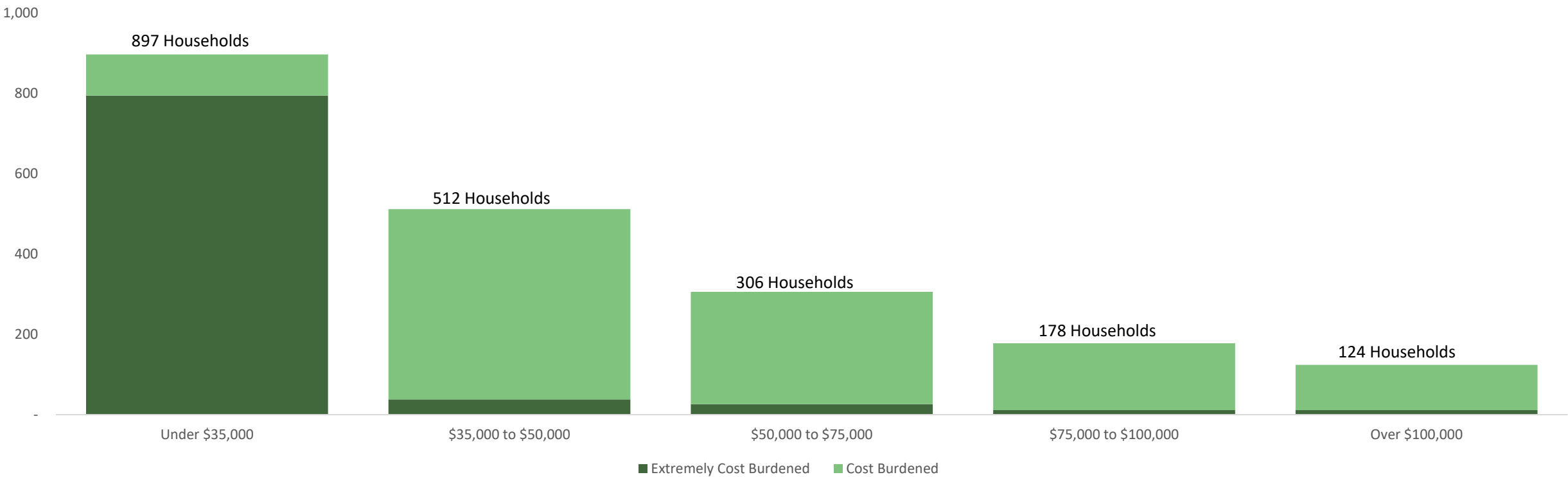
Households by Tenure, 2021



Community Profile | Renter Housing Cost Burden

The Town is experiencing a growing housing crisis as residents are increasingly unable to afford living within the Town. Of the **5,343** renter households in Town, over **881** are extremely cost burdened, meaning they spend more than 50% of their household income on housing costs. **1,136** renter households are cost burdened, meaning they spend more than 30% but less than 50% of their household income on housing costs. **Together there are more than 2,000 renter households (38% of renter households) in the Town that are cost burdened.**

Cost Burdened and Extremely Cost Burdened Renter Households by Income, 2021



Source: ACS 5 Year Estimates (2017-2021), Published December 8, 2022

Community Profile | Housing Affordability

“Affordable Housing” means housing in which the occupant pays no more than 30% of their gross monthly household income for housing costs (i.e. rent, mortgage), including utilities.* In May 2023, the U.S. Department of Housing and Urban Development (HUD) released the FY23 Income Limits Summary. **Per HUD, the 2023 Area Median Income (AMI) for a 3-person household (average size) in the Raleigh MSA—which includes Apex—is \$105,000.** For the month of June 2023, the Median Home Sales Price in Apex was \$585,000 (Redfin), compared to a February 2023 dip (\$505,000) and an April 2023 spike (\$630,000) in the sales market.

\$585,000

Median Market-Rate Home Sales Price
(Redfin, for June 2023)

\$1,695

Median Market-Rate Rent for all 2-BR Units
(Zillow Rent Index, for June 2023)

\$1,412

FY 2023 HUD Fair Market Rent for a 2-BR Unit,
Raleigh, MSA

A 3-person household earning 100% AMI can reasonably afford a 3-bedroom house priced at \$311,900 (30-yr fixed, +/-8.318% interest, 5% down), based on Town Staff estimates. This is significantly lower than the typical median market-rate home sales price in the Town, which was \$585,000 for June 2023. **A 3-person household earning 80% AMI reasonably can afford a 3-bedroom house priced at \$241,600** (30-yr fixed, +/-8.405% interest, 5% down). The median market-priced house costs approximately \$343,400 more than a household making 80% AMI could reasonably afford.

Per the Zillow Rent Index, the typical rent rate for 2-bedroom units in Apex is \$1,250 to \$2,335, and the Median Market-Rate Rent was \$1,695 in June 2023, not including utilities. The 2023 North Carolina Housing Finance Agency (NCHFA) Multifamily Tax Subsidy Program Rent Limits for a 2-bedroom unit in the Wake Metro are \$1,530/month (60% AMI), and \$2,040/month (80% AMI). Zillow reports Rent in Apex, NC is 16% lower than the national median.

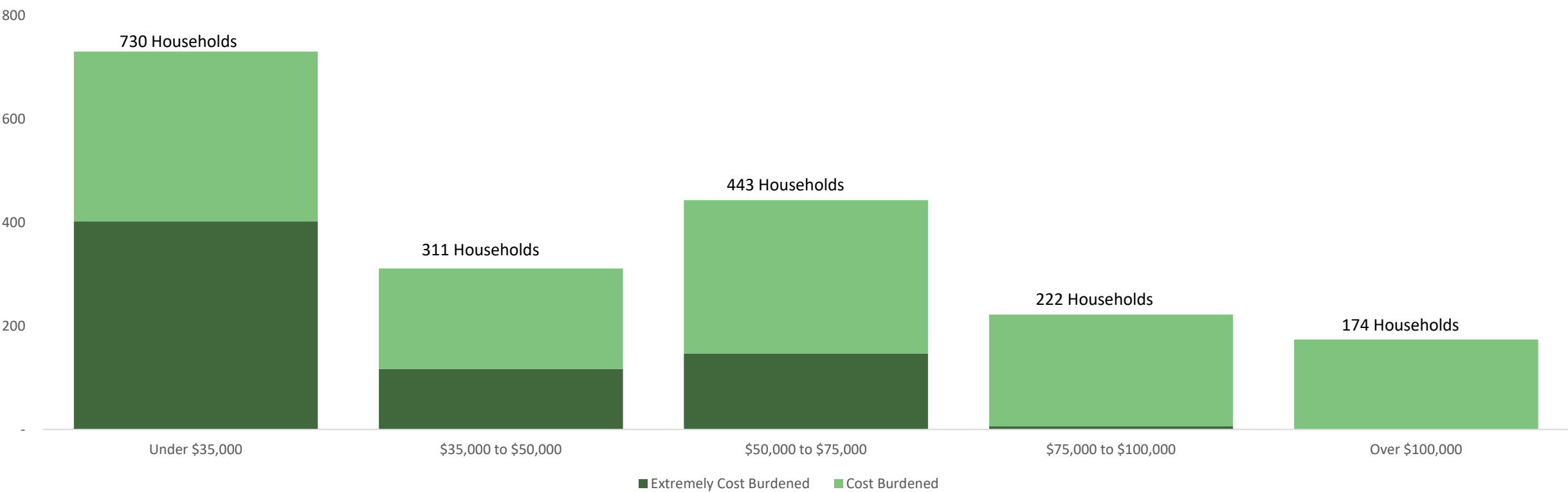
Fair Market Rents, regularly published by the U.S. Department of Housing and Urban Development (HUD), represent the cost to rent a moderately-priced dwelling unit in the local housing market. The above FMR is for a 2-bedroom unit.

**A full list of costs included in “housing costs” can be found in the Appendix
Source: Redfin sales data, Zillow rent index, HUD AMI Estimates, NC Housing Coalition, Town Staff*

Community Profile | Owner Housing Cost Burden

Of the 15,091 owner households in the Town, over **672** are extremely cost burdened, meaning they spend more than 50% of their household income on housing costs. An additional **1,208** owner households are cost burdened, meaning they spend more than 30% but less than 50% of their household income on housing costs. Together there are more than **1,880** owner households (12%) in Town that are cost burdened.

Cost Burdened and Extremely Cost Burdened Owner Households by Income, 2021



Source: ACS 5 Year Estimates (2017-2021), Published December 8, 2022

Action Plan Progress

Affordable Housing Fund

Beginning in FY21, the Town Council approved a special revenue fund called the Affordable Housing Fund (AHF) to assist with the creation and preservation of affordable housing within the Town.

The table below summarizes the Town’s funding expenditures in FY23 that were dispersed from the AHF. There were no additional commitments for other projects made in FY23.

Affordable Housing Fund FY 2022-23 Expenditures				
Activity Name	Activity Type	Activity Goal	Commitment Type	Dollar Amount
Apex Cares Housing Rehabilitation Program	Owner-Occupied Rehabilitation	15 Households Served	Grant	\$200,000.00
Stone Glen Apartments	New Construction Affordable Rental Development	164 New Rental Units	Loan	\$1,665,000.00
Total Funds Expended in FY23				\$1,865,000.00
Total Funds Expended To-Date				\$2,246,963.03

Affordable Housing Plan | Overview

In 2020, the Town initiated a 9-month long planning effort to address the community's affordable housing needs. That effort resulted in the [Town's Affordable Housing Plan \(AHP\)](#), which was adopted by Town Council on February 1, 2021.

The AHP outlined actions the Town should take to achieve the plan's stated vision of:

"Apex welcomes people of diverse backgrounds, and supports opportunities for affordable, safe, sanitary, and quality housing that meets the needs of people of all incomes, ages, and abilities"

The following 14 recommendations were adopted to help the Town achieve this vision.

Near-Term Recommendations (<2 Years)

1. Build Town Staff Capacity
2. Develop the Housing Advisory Board
3. Implement an Affordable Housing Incentive Zoning Policy
4. Create an Owner-Occupied Rehabilitation Assistance Program
5. Increase Low-Income Housing Tax Credit (LIHTC) Gap Financing

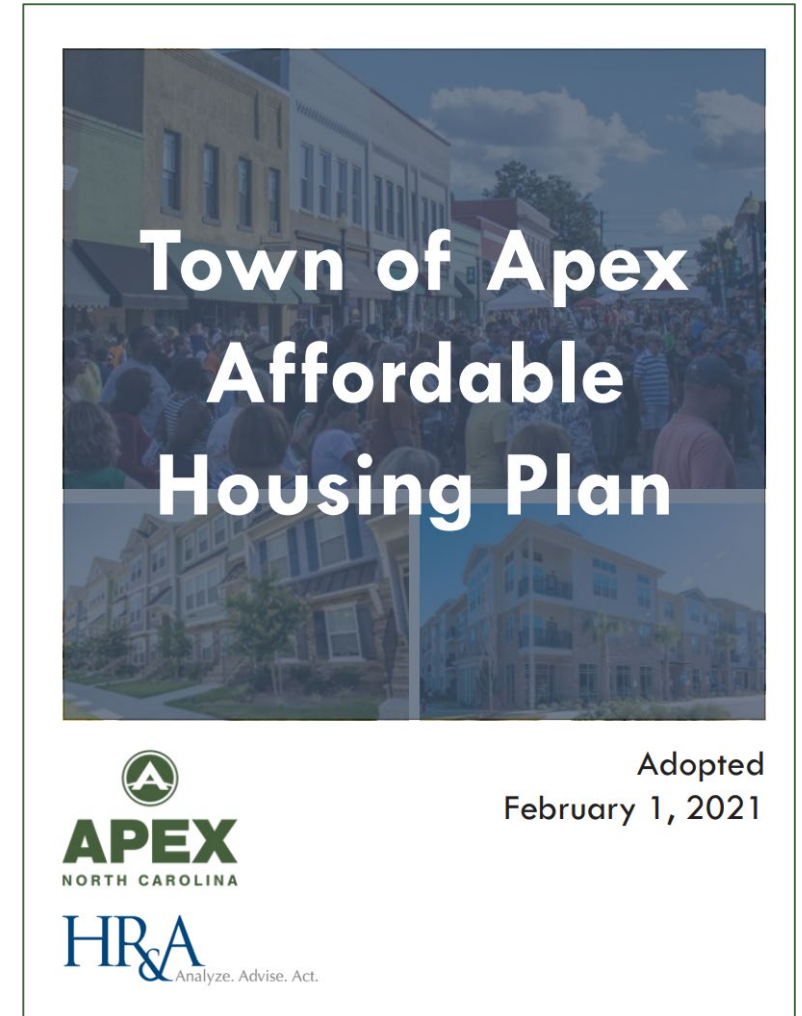
Mid-Term Recommendations (2 - 5 Years)

6. Publish an Annual Housing Report & Online Dashboard
7. Implement Diversity & Racial Equity Initiatives
8. Develop Affordable Housing Advocacy Partners
9. Increase Support for Homeownership
10. Implement Public Land Acquisition and Sale
11. Develop Transit-Oriented Development Density Practices

Long-Term Recommendations (5 - 10 Years)

12. Develop Emergency Rental Assistance and Support Services
13. Increase Accessory Apartments*
14. Develop "Soft Density" By-Right Policies*

*Activities that are not represented in this report.



Near-Term Recommendations (<2 Years)



Near-Term | Build the Town's Staff Capacity

The Town will increase the capacity of staff to support the successful implementation of the Affordable Housing Plan.

Actions Taken



Demetria John

Assistant Town Manager

In January 2023, the Town hired Assistant Town Manager Demetria John. The Community Development & Neighborhood Connections (CDNC) Department falls within her leadership portfolio. Demetria managed the recruitment of the CDNC Director, as well as providing leadership and oversight to department staff until the position was filled.



Marla Newman

Community Development & Neighborhood Connections Director

In Spring/Summer 2023, the Town conducted a nationwide recruitment for its first-ever CDNC Director position. The newly created department will include Affordable Housing Programs, the 311 Community Connections Center, a Community Engagement division, and a Neighborhood Improvement division. Looking ahead to FY 23-24, Marla Newman was hired as the Town's first-ever CDNC Director to lead the new department.



Michael Linsenmeyer

Senior Housing Specialist

In October 2022, the Town hired Michael Linsenmeyer as its first-ever Senior Housing Specialist. Michael works alongside the Planning Department by participating on the Technical Review Committee (TRC) to implement the Affordable Housing Incentive Zoning Policy, provides staff support to the Housing Advisory Board (HAB), and provides program administration related to the various housing programs and outreach initiatives.

Near-Term | Housing Advisory Board

The Town will create a Housing Advisory Board (HAB) to provide input on the use of the Town’s affordable housing funding and policy, as well as to be responsible for championing education and outreach around affordable housing.

Actions Taken

[HAB Unified Development Ordinance \(UDO\) Amendment](#)

On September 14, 2021, the Town Council adopted an amendment to the UDO to add Section 2.1.10 to include provisions for the new HAB. The HAB has the following powers and duties under the provisions of the UDO:

1. Recommend to the Mayor and Town Council, policies and funding recommendations related to affordable housing;
2. Advise the Mayor, Town Council, and Planning Board on housing advocacy efforts related to affordable housing; and
3. Assist in the creation of the annual housing report.

HAB Appointments

In FY23, the HAB nominated Chair Welch and Vice-Chair Fussell serve again in their respective roles as Chair and Vice-Chair. Mayor Jacques Gilbert recommended both for reappointment consideration and each were confirmed at the March 14, 2023, Town Council Meeting. Listed below are the HAB members that served during the reporting year.

1 Year Term (Oct 2022-2023)	
1.	Audra Killingsworth, <i>Non-Voting Member</i>
2.	Tina Sherman, <i>Non-Voting Member</i>

2 Year Term (Oct 2021-2023)	
1.	Paul Kane, <i>Board Member</i>
2.	Seth Friedman, <i>Board Member</i>
3.	Jacob Rogers, <i>Board Member</i>

3 Year Term (Oct 2021-2024)	
1.	Philip J. Welch, <i>Chair</i>
2.	Rhett Fussell, <i>Vice-Chair</i>
3.	Valeria Cesanelli, <i>Board Member</i>
4.	Martha L. Rodgers, <i>Board Member</i>

Near-Term | Affordable Housing Incentive Zoning

Develop a menu of incentive options for developers to choose from in exchange for providing affordable housing units or lots within a development as part of the Rezoning and Planned Unit Development (PUD) approval processes.

Actions Taken

[2023 Adopted Affordable Housing Incentive Zoning Policy](#)

Town Council authorized direction through the adopted AHP to establish an Affordable Housing Incentive Zoning Policy that would set forth clear minimum recommendation criteria, applicability standards, and a variety of incentive options for applicants to consider in exchange for providing residential affordable housing units or lots within a development as part of the rezoning and PUD approval process. The policy encourages applicants to provide residential affordable housing units or lots as part of a proposed development in exchange for incentives.

The summary below describes the actions that were accomplished in FY22-23 regarding the Policy.

FY23 Summary

- In December 2022, Aaron Sorrell of Community Planning Insights, LLC was contracted to facilitate policy development and provide technical support in completing the policy draft.
- In the Spring of 2023, staff worked with Sorrell to reframe the draft to incorporate the ongoing changes that resulted from HAB deliberations.
- At their June 16, 2023, Regular Meeting, the HAB voted to recommend policy adoption after nearly a year-and-a-half of HAB review.
- At the June 27, 2023, Town Council meeting, the Council voted unanimously to adopt the Affordable Housing Incentive Zoning Policy.

Near-Term | Affordable Housing Incentive Zoning

Develop a menu of incentive options for developers to choose from in exchange for providing affordable housing units or lots within a development as part of the rezoning and Planned Unit Development (PUD) approval processes.

Approved Market-Rate Developments With Affordable Units

In FY23, Town Council approved **(10)** market-rate developments that included affordable housing units through the Rezoning and Planned Unit Development (PUD) process. A total of **(66)** affordable housing units were committed through zoning conditions in these developments, which included **(31)** affordable housing *ownership* units and **(35)** affordable housing *rental* units. The total on-site affordable housing unit percentage was **6.29%** for ownership developments, and **4.32%** for rental developments. **These metrics are displayed below, and the following slide provides detailed information regarding each project.**

Affordable Housing Committed through Rezoning/PUD, All Units			
Number of Developments	Total Units	Total Affordable Units	Total Affordable Unit Percentage
10	1,304	66	5.06

Affordable Housing Committed through Rezoning/PUD, Ownership Units		
Total Ownership Units	Affordable Ownership Units	Affordable Ownership Unit Percentage
493	31	6.29

Affordable Housing Committed through Rezoning/PUD, Rental Units		
Total Rental Units	Affordable Rental Units	Affordable Rental Unit Percentage
811	35	4.32

Near-Term | Affordable Housing Incentive Zoning

Develop a menu of incentive options for developers to choose from in exchange for providing affordable housing units or lots within a development as part of the rezoning and Planned Unit Development (PUD) approval processes.

FY 22-23 (July 1, 2022 - June 30, 2023) Incentive Zoning Projects									
Project Name	Approval Date	Housing Type	Tenure	Total # of Units	Total # of Affordable Units	Total % of Affordable Units	AMI Breakdown of Units	Affordability Period	Incentive Received
Morris Tract PUD	8/9/2022	Townhomes / Single Family	Ownership	110	2	1.82%	100% AMI	10 Years	
Yellowbridge PUD (Ennis Branch)	9/27/2022	Townhomes / Single Family	Ownership	156	2	1.28%	100% AMI	15 Years	
Chapel Ridge North PUD	10/25/2022	Multifamily	Rental	370	13	3.51%	60% AMI	10 Years	Parking Reduction
Utley Farms PUD	11/8/2022	Single Family	Ownership	95	2	2.10%	100% AMI	20 Years	Parking Reduction
The Townes at the Station PUD	1/10/2023	Townhomes	Ownership	72	4 (lots)	5.55%	100% AMI	20 Years	
Tingen Road Residential (Townes on Tingen-MSP)	1/10/2023	Townhomes	Ownership	16	16	100%	100% AMI	10 Years	
2021 N Salem Street PUD - aka Parc at Bradley Farm	1/24/2023	Townhomes	Ownership	40	1	2.50%	100% AMI	10 Years	
406 S. Salem Street PUD "The Heights PUD"	2/28/2023	Multifamily	Rental	49	2	4%	80% AMI	20 Years	
Elevate 64 West PUD	3/28/2023	Multifamily	Rental	392	20	5%	80% AMI	10 years	
940 Tingen Road (Townes on Tingen MSP)	6/27/2023	Townhomes	Ownership	4	4	100%	100% AMI	10 years	
10 Total Approved Rezoning				1,304	66	5.06	Median = 92% AMI	Median = 13.5 Years	

Near-Term | Owner-Occupied Rehabilitation Assistance

Partner with a non-profit organization to support low-income homeowners in making needed repairs to preserve safe and healthy housing, correct hazardous structural conditions, help residents age in place, and improve accessibility for persons with disabilities.

Actions Taken

[Apex Cares Housing Rehabilitation Program](#)

Apex Cares Housing Rehabilitation Program (Apex Cares) is a housing preservation program in partnership with the non-profit [Rebuilding Together of the Triangle \(RTT\)](#). Apex Cares assists eligible low-income (up to 65% AMI) homeowners of single-family detached dwellings, condominiums, and townhomes within the Town's corporate limits. Apex Cares provides needed repairs to preserve safe and healthy housing, correct hazardous structural conditions, help residents age in place, and improve accessibility for persons with disabilities.

Apex Cares has expended \$500,000 in funding to date - \$200,000 of which was used in FY23. In January 2023, the Service Agreement with RTT was renewed until January 2024.

\$500,000

Total Funding Expended To-Date

25

Rehabs Completed All-Time

\$200,000

Funding Expended in FY 2022-23

15

Rehabs Completed in FY 22-23



Example of home improvements made possible by Apex Cares funding

Near-Term | Owner-Occupied Rehabilitation Assistance

Partner with a non-profit organization to support low-income homeowners in making needed repairs to preserve safe and healthy housing, correct hazardous structural conditions, help residents age in place, and improve accessibility for persons with disabilities.

Actions Taken

Home Repair Fair

In May 2023, in a community outreach initiative to connect income-qualified Apex homeowners to organizations and programs that provide owner-occupied home rehabilitation programs, the Community Development & Neighborhood Connections Department co-sponsored the inaugural Home Repair Fair alongside the Housing Advisory Board (HAB). HAB Chair Phil Welch assembled several more co-sponsors such as: Habitat Wake, Resources for Seniors, Shield NC, Western Region Affordable Housing Action Group, Western Wake Crisis Ministry, White Oak Foundation, and various Faith-based Leaders in Apex.

Staff from the following local agencies and organizations participated to provide program materials and information to interested residents: Town of Apex (Apex Cares), Town of Apex Building Inspections and Permits, Rebuilding Together of the Triangle (RTT), Apex United Methodist Church, NC Housing Finance Agency, Wake County Rehab Grant Program, Habitat Wake, Resources for Seniors, and Fiesta Cristiana Mission Congregation.

Mayor Jacques Gilbert, Mayor Pro Tem Audra Killingsworth, Council Members Brett Gantt, Ed Gray and Arno Zegerman, along with Wake County Commissioner Cheryl Stallings attended the fair.

Based on Chair Welch's survey analysis, there were nearly 70 attendees. Survey data from 18 respondents reported the following:

- 14 respondents lived in single-family homes; 2 in townhomes; 1 in a mobile home and 1 in an apartment.
- 8 respondents found a service which could help with their repair needs; 5 found they did not qualify for services, but still needed repairs; 4 replied that they didn't need assistance; and 1 was on a waiting list for repairs.
- At least 11 respondents said they paid more than 30% or more of their income for housing and utilities which is the definition of being "housing cost burdened."
- At least 10 respondents replied that their homes needed major repairs that they couldn't afford.
- A wide variety of major repairs needed were cited, including floors (4); roofing (3); and HVAC (2).

Near-Term | Low-Income Housing Tax Credit Gap Financing

Provide gap financing to increase the production of Low-Income Housing Tax Credit (LIHTC) housing and to reduce the cost of local fees for affordable housing developments. **Town Council approved funding commitments for two LIHTC projects in prior years; below is a summary of each project and a FY23 update.**

Actions Taken

Town Council Approved Funding Commitments for Two LIHTC Projects

Project #1: [Stone Glen Apartments](#) (DHIC, Inc.) – 4% LIHTC Project

Stone Glen will include a total of 164 rental housing units, affordable to households earning up to 70% AMI, adjusted for family size, as published by HUD. The development will also include 36 permanent supportive housing units and will be the largest 100% affordable rental development in Town history. **In FY23, the Town Council approved a Development Agreement to help DHIC address a funding gap and allow DHIC to shift some units back to the 70% AMI range. The new proposed weighted average affordability is 60% AMI. The project completed development review in the fiscal year and is currently under construction. DHIC expects to complete construction in Summer 2024 and is accepting names to the project [interest list](#).**



Rendering of Stone Glen

Project #2: Abbey Spring (Evergreen Construction Company) – 9% LIHTC Project

Abbey Spring will include a total of 84 rental housing units for seniors*. 10% of the units within the development will be set-aside for targeted populations such as the disabled and the unhoused. An additional 10% of the units will be set-aside for Wake County Rental Assistance Housing Program (RAHP) voucher holders. The units will be offered to households earning up to 60% AMI, adjusted for family size, as published by HUD. Abbey Spring is poised to be the largest 100% affordable *senior* rental development in Town history. **In FY23, Abbey Spring received Site Plan approval.**

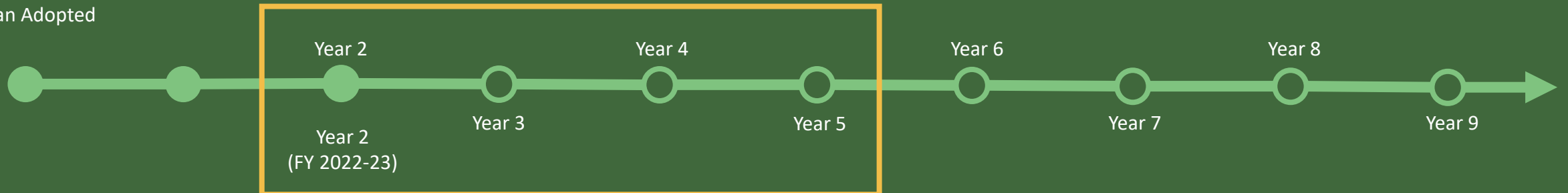


Rendering of Abbey Spring

**Individuals that are 55 years of age or older*

Mid-Term Recommendations (2 - 5 Years)

Affordable Housing
Plan Adopted



Mid-Term | Annual Housing Report & Dashboard

Provide the public with transparency on data, progress, and performance on the Affordable Housing Plan recommendations. Provide an Online Housing Dashboard to track efforts and convey important data.

Actions Taken

Annual Housing Report

This version of the Annual Housing Report is the second edition and covers the program's accomplishments during FY23. The Annual Housing Report is built using a similar framework as the Affordable Housing Plan, to allow Town Council, HAB members, community members, and staff to track the ongoing progress of the Town each fiscal year with respect to each of the 14 recommendations identified in the Affordable Housing Plan.

The inaugural Annual Housing Report was issued for [FY2021-22](#) and presented to the HAB on July 7, 2022.

Online Housing Dashboard

Town staff is in the process of designing an Online Housing Dashboard (OHD) to provide data that informs the community of affordable housing progress and accomplishments. In FY23 internal work on the report was conducted between the GIS team in the Town's Planning Department and Housing Program staff. The Dashboard will include key metrics and performance indicators to help track and report on housing development activities. The OHD is anticipated to be made available to the public in FY24.

Mid-Term | Diversity & Racial Equity Initiatives

Ensure the Town's commitment to being a welcoming community of all backgrounds is met. Apply a racial equity lens to understand housing policies, programs, and investments.

Actions Taken



Linda Jones

Town Diversity, Equity, and Inclusion (DEI) Office

In 2022, the Town hired Linda Jones as [Diversity, Equity, and Inclusion](#) Director for Town-wide diversity and racial equity initiatives. This position allows for the Town to understand the potential barriers of entry for a diverse population and the ability to analyze housing policies and programs in relation to diversity and racial equity.

DEI updates for FY23 include:

- DEI Coordinator, Celeste Sherer was hired in March 2023.
- In June 2023, the [Western Regional Community Advocacy Committee](#) (WRCAC) invited the Town of Apex and the Town of Morrisville to present their [Language Access Plan](#) efforts.



Celeste Sherer

Looking ahead to FY24:

- As each new department continues to grow, programs and policies will become more integrated particularly as it relates to Community Engagement initiatives.
- A designee from the Community Development & Neighborhood Connections will replace Director Jones as the Town Liaison to the WRCAC. The mission of the WRCAC is to ensure residents of Western Wake County have equal access to Health and Human Services and to engage the community, so it is evident to everyone that addressing the basic human needs of the Western region will improve the quality of life for everyone, not just the recipients of the services.

Mid-Term | Diversity & Racial Equity Initiatives

Ensure the Town's commitment to being a welcoming community of all backgrounds is met. Apply a racial equity lens to understand housing policies, programs, and investments.

Actions Taken

Accessible Marketing Strategy

Town staff ensured that housing information was easily accessible to all members of the public. Town staff employed a variety of methods to spread awareness of housing initiatives; including but not limited to the following:

FY23 Summary

- Created a dedicated webpage for the [Community Development & Neighborhood Connections Department](#), which includes subpages for all [affordable housing](#) programs and policies;
- Created multilingual marketing materials for the 2023 Home Repair Fair and Apex Cares Housing Rehabilitation Program;
- Engaged with the public at the Home Repair Fair in May 2023;
- Engaged with the public at [PeakFest](#) in May 2023;
- Attended Western Regional Affordable Housing Action Group (WRAHAG) meetings and provided Housing Program updates to the group's organizers;
- Engaged with Planning Department staff to make progress towards implementing the Housing Dashboard.

Mid-Term | Affordable Housing Advocacy Partners

The Town has a need for additional education and communication about the need for affordable housing. Partnering with organizations and groups can help the Town work to address affordable housing needs.

Actions Taken

Developing Affordable Housing Advocacy Partnerships

The Town participates and partners with the organizations below. These partnerships are spread across more than one year and are considered on-going:

- Western Wake Crisis Ministry (WWCM) – The Town set-aside \$509,000 to start a Utility Customer Assistance Program (UCAP), which provides financial assistance to qualified applicants that are delinquent on their utility bills. The Town partners with the non-profit WWCM to help administer the UCAP.
- Rebuilding Together of the Triangle (RTT) – The Town partners with the non-profit RTT to help administer the Apex Cares Housing Rehabilitation Program.
- Western Regional Affordable Housing Action Group (WRAHAG) – HAB Chair Phil Welch attends monthly, and staff attend periodically, the WRAHAG meetings which include participation from other municipalities such as Wake County, Town of Cary, Town of Morrisville and other community stakeholders and advocates to share progress on affordable housing initiatives and goals.
- Habitat for Humanity of Wake County – Habitat for Humanity developed 9 new affordable single-family detached homes for first-time homebuyers on Kissena Lane; the Town partnered with Habitat to provide funding.
- Wake County – The Town is in a Cooperation Agreement until the end of FY24 with Wake County, who administers HUD entitlement funding for the Community Development Block Grant (CDBG) Program, Home Investment Partnerships Program (HOME), Emergency Solutions Grants (ESG) Program and Housing Opportunities for Persons with Aids (HOPWA) programs. No funds were distributed to the Town in FY23.

Mid-Term | Support for Homeownership

The Town of Apex desires to increase homeownership for first-time homebuyers by providing financial assistance and counseling services through partnerships with area nonprofits.

Actions Taken

Habitat For Humanity of Wake County - Kissena Lane Project

In a prior year, the Town provided financial assistance from the AHF to Habitat for Humanity of Wake County for the affordable home ownership project known as Kissena Lane. Assistance came in the form of fee reimbursements for the water capital fee, sewer capital fee, and parks and recreation fee-in-lieu of dedication. Habitat for Humanity has now completed construction on 9 new affordable single-family detached homes on Kissena Lane for first-time homebuyers. Habitat for Humanity homeowners receive financial education, pay an affordable mortgage, and work alongside volunteers and other Habitat for Humanity homeowners by investing hours of labor, called “sweat equity” to help build their homes. The project began construction in August 2021, and **in FY23, the final 3 homes were completed and sold between \$360K and \$390K to first-time homebuyers earning no more than 70% of the Area Median Income.**

Homeownership Programs and Education

Town staff collaborated with multiple local lenders to establish relationships to be better prepared to expand homeownership programs and educational opportunities in the future, when the Town is prepared to expand programming. As part of these collaborations, Town staff asked mortgage professionals to review the Town's Deed Restrictions templates for any compatibility issues with their respective first-time homebuyer initiatives, etc. The lending institutions include:

- *North State Bank*
- *Coastal Federal Credit Union*
- *Intercoastal Mortgage*
- *Pinnacle Financial Partners*
- *Towne Bank*
- *State Employees Credit Union*

Mid-Term | Public Land Acquisition & Sale

Adopt a Town-wide policy to evaluate publicly-owned land prior to development or disposition and evaluate any new potential purchases of property for affordable housing opportunities.

Actions Taken

American Rescue Plan Act (ARPA)

The Town was awarded one-time American Rescue Plan Act (ARPA) funding. A total of \$3,000,000 of ARPA funding has been set aside to acquire land for either affordable housing ownership or rental development. The site acquisition funding includes pre-development and post purchase costs for future affordable housing development. An additional \$1,000,000 of ARPA funding has also been set aside for other housing assistance activities. Planning activities regarding this funding are ongoing.

Affordable Housing Inventory and Site Analysis

In FY23, the Town engaged in discussions with the UNC School of Government's Development Finance Initiative (DFI) to provide pre-development activities to support the Town in identifying and prioritizing sites for affordable housing development.

Mid-Term | Transit-Oriented Development Density

Amend the Future Land Use Map to show higher density multifamily development in areas adjacent to key transit infrastructure.

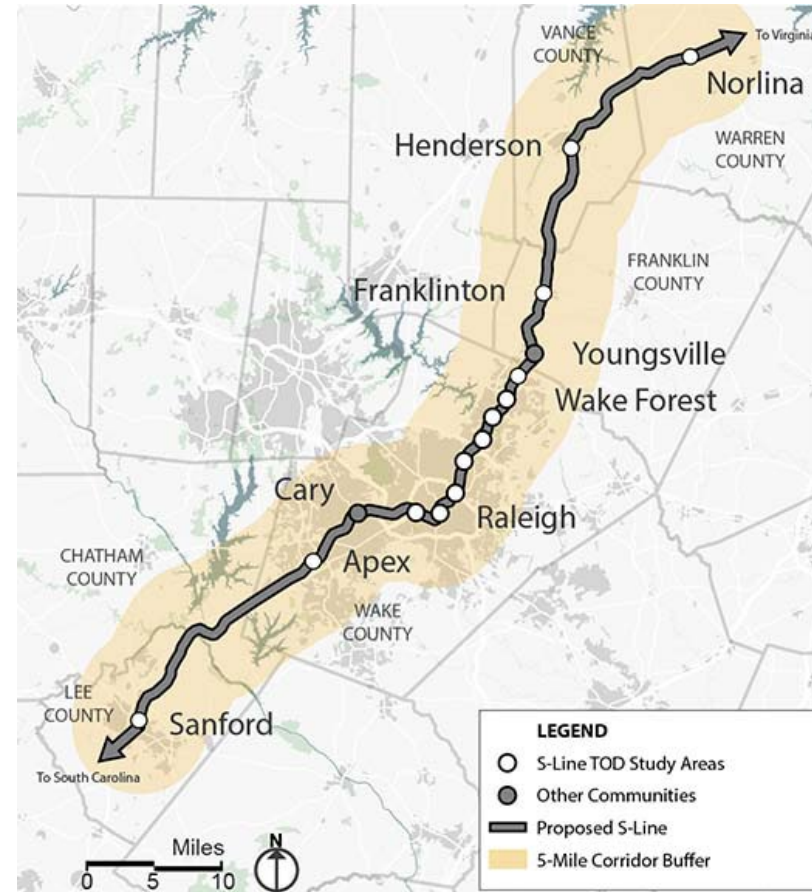
Actions Taken

The Town of Apex, along with seven other communities along the 95-mile CSX "S-Line" rail corridor, participated in a transit-oriented development (TOD) study led by the North Carolina Department of Transportation (NCDOT). The study is intended to help Apex prepare for the future of passenger rail along the S-Line and includes land use and transportation recommendations in areas adjacent to possible future mobility hub locations.

The two areas of focus are multiple blocks in the downtown core between Center Street and Hunter Street, and along the NC 55 corridor east and west of Salem Street. TOD recommendations include increased residential densities, new mixed-use areas along NC 55, additional pockets of urban open space, and new multi-modal connections between Town Campus and Salem Street and between Williams Street and the historic center of Salem Street.

In the next fiscal year, the Town will be working with NCDOT on a feasibility study for the future mobility hub.

The report is available at: <https://www.ncdot.gov/divisions/integrated-mobility/innovation/s-line-study>.



Source: <https://www.ncdot.gov/divisions/integrated-mobility/innovation/s-line-study/Pages/default.aspx>

Long-Term Recommendations (5-10 Years)

Affordable Housing
Plan Adopted



Long-Term | Emergency Rental Assistance and Supportive Services

Assist residents who are at risk of homelessness or housing instability with emergency rental assistance and other related services.

Actions Taken

Due to the economic hardships of the COVID-19 pandemic, Town Council approved the creation of the Town's Utility Customer Assistance Program (UCAP) to assist utility customers that were delinquent on their utility bills. The Town appropriated \$509,000 in FY2021-22 to start the UCAP, allowing qualified applicants to receive up to \$636 in financial assistance.

The Town has partnered with Western Wake Crisis Ministry (WWCM) to administer the UCAP. Since the establishment of the UCAP, there have been 488 approved applications totaling \$162,018.99 in assistance provided to residents in Town to-date. **The metrics below summarize the number of households served and the funds dispersed during FY23.**

\$509,000

Total Funding

219

Households Served in FY23

\$43,297.99

Funds Dispersed in FY23

Appendix

Appendix | Affordable Housing Costs

Renter Household Housing Costs	Ownership Household Housing Costs
<ul style="list-style-type: none">• Rent• Utilities• Renters Insurance - <i>if applicable</i>	<ul style="list-style-type: none">• Mortgage Payment (Principal + Interest)• Utilities• Property Taxes• Homeowners Insurance• Mortgage Insurance – <i>if applicable</i>• Homeowners Association (HOA) Dues – <i>if applicable</i>• Other Property Assessments – <i>if applicable</i>

Appendix | 2023 Area Median Income Limits

Affordable AMI % & Income Category	Family Size 1 Person	Family Size 2 Person	Family Size 3 Person	Family Size 4 Person	Family Size 5 Person
30% AMI Extremely Low-Income	\$23,800	\$27,200	\$30,600	\$34,000	\$36,750
50% AMI Very Low-Income	\$39,700	\$45,350	\$51,000	\$56,650	\$61,200
65% AMI Low-Income (Apex Cares Program Income Limit)	\$53,235	\$60,840	\$68,445	\$76,050	\$82,134
80% AMI Low-Income	\$63,500	\$72,550	\$81,600	\$90,650	\$97,950
100% AMI Median-Income	\$81,900	\$93,600	\$105,300	\$117,000	\$126,360

Appendix | Sales Price Data

Market-Rate Median Home Sales Price	Est. 3 Bedroom Maximum Affordable Initial Sales Price*	Market-Rate to Affordable Sales Price Dollar Difference
\$585,000** (June 2023)	\$256,200 80% AMI (Low-Income)	\$328,800
	\$334,200 100% AMI (Median-Income)	\$250,800
Affordable initial sales price assumptions include: 5.00% down payment, 95.00% Loan-To-Value (LTV), 30 yr. fully amortized fixed rate principal and interest loan. **The Redfin Median Home Sales Price for June 2023 represents a temporary dip in Median Sale Prices compared to other months during the fiscal year.		

Appendix | Rent Data

Bedroom Size	Average Monthly Market-Rate Rents (Apartments)	Affordable Monthly Maximum Rent Limits @ 60% AMI (Including Utilities)	Monthly Market-Rate to Affordable Rent Dollar Difference
1 Bedroom	\$1,466	\$1,275	+\$191
2 Bedroom	\$1,695	\$1,530	+\$165
3 Bedroom	\$1,900	\$1,767	+\$133