



PROPOSED AGENDA
Bermuda Run Town Council Meeting
Tuesday, May 10, 2022
6:00PM

WinMock At Kinderton Loft

Mission: "The Town of Bermuda Run exists to provide core public services that enhance the quality of life for its residents and an environment for the business community to thrive".

1. Call to Order

2. Pledge of Allegiance

3. Moment of Silence

"It is the intent of the Town Council to solemnize the proceedings of this meeting and the business brought before the governing board, to offer the opportunity for a reflective moment of silence."

4. Adoption of the Agenda

Motion: _____ Second: _____ In Favor: _____ Opposed: _____

5. Approval of the April 12, 2022 Town Council Meeting Minutes

Motion: _____ Second: _____ In Favor: _____ Opposed: _____

6. Citizens' Comments

7. Proposed Action Item(s)

A. Proclamation – National Law Enforcement Week & National Peace Officers Memorial Day

All citizens of Bermuda Run should remember and recognize the men and women who serve and protect them, and keep in mind that there are law enforcement officers working in our town every day to ensure that they remain safe.

Motion: _____ Second: _____ In Favor: _____ Opposed: _____

B. Public Hearing – Zoning Map Amendment 2022-04

RLM Development, LLC (Home Urban) has applied to rezone a 22.5 acre portion of a tract of land totaling approximately 64.7 acres from Commercial Mixed (CM), WS-IV Yadkin River Watershed (WS-IV) to Village Mixed, WS-IV Yadkin River Watershed (VM, WS-IV). The subject Property is behind 196 and 190 NCHWY 801 N and is further described as a portion of parcel of Davie County Tax Map C800000001.

Mayor Cross Opens Public Hearing –

Mayor Cross Closes Public Hearing –

Following the public hearing, the Council is requested to take action to approve, to deny, or to defer. Please reference page 7 of 7 of the staff report when making a motion for consideration.

Motion: _____ Second: _____ In Favor: _____ Opposed: _____

C. Town Manager's 2022-2023 Proposed Budget

North Carolina General Statutes require adoption of a budget by June 30th of each year. The Town Manager presents a proposed budget based on feedback from the January Town Council Planning Sessions and subsequent follow-up communication. A public hearing must be held prior to the adoption of the budget. The Town Manager recommends the Town Council set a public hearing on the proposed 2022-2023 budget for Tuesday, June 14, 2022 at 6pm at Bermuda Run Town Hall.

Motion: _____ Second: _____ In Favor: _____ Opposed: _____

8. Town Manager Comments

9. Council/Mayor Comments

10. Adjourn

Motion: _____ Second: _____ In Favor: _____ Opposed: _____

Town of Bermuda Run

Town Council Meeting Minutes

April 12, 2022 – 6:00 PM

The Town Council of Bermuda Run held its scheduled meeting on Tuesday, April 12, 2022 at 6:00 PM. The meeting was held at the Bermuda Run Town Hall.

Council Members Present: Mayor Rick Cross, Mike Brannon, Curtis Capps, Mike Ernst, and Melinda Szeliga

Council Members Absent: Heather Coleman

Also Present: Lee Rollins, Town Manager; Cindy Poe, Town Clerk; Brian Williams, Town Attorney

Call to Order Mayor Rick Cross called the meeting to order.

Pledge of Allegiance

Moment of Silence

It is the intent of the Town Council to solemnize the proceedings of this meeting and the business brought before the governing board, to offer the opportunity for a reflective moment of silence.

Adoption of the Agenda

Council Member Curtis Capps made a motion to approve the agenda. Council Member Mike Ernst seconded the motion. The motion was approved by a vote of four (4) in favor and none opposed.

Approval of the March 8, 2022 Town Council Meeting Minutes

Council Member Melinda Szeliga made a motion to approve the March 8, 2022 meeting minutes. Council Member Mike Brannon seconded the motion. The motion was approved by a vote of four (4) in favor and none opposed.

Public Comments –

Glenda Smith, retired educator from Farmington, spoke regarding Davie County Mental Health Advocates and the issues regarding Mental Health in Davie County.

Tina Smith Goins of Kinderton Village shared concerns regarding proposed apartments behind Lowe's Foods and the false statements/rumors being circulated in the community.

Public Hearing – Zoning Map Amendment 2022-02

Fuller Land Company has applied to rezone four tracts of land totaling approximately 22 acres from General Business (GB), Gateway Corridor Overlay (GC-O) to Village Mixed (VM). The subject properties are located along Hillsdale West Drive.

Mayor Cross Opened the Public Hearing

Attorney Chad Bomar, representing Fuller Land Company, spoke regarding the need for this land development. He stressed that the Council should ask "Is it reasonable and in the public interest?" He quoted from the Town's Comprehensive Plan to make his case that it is in the best interest to add more rooftops.

Realtor Kim Strohacker spoke in favor of the zoning amendment, adding that people want to move here for a better quality of life.

Mayor Cross Closed the Public Hearing

Following the public hearing, Council Member Curtis Capps made a motion to approve the Zoning Map Amendment stating, "The Town Council finds that the proposed general use rezoning is consistent with the Town of Bermuda Run Comprehensive Plan policies, specifically the objective to encourage managed growth and development that is compatible with the Town's character, surrounding land uses and available infrastructure and to support residential growth to attract additional retail and service amenities desired by current residents.

Therefore, we find this zoning amendment is reasonable and in the public interest because it supports the Comprehensive Plan policies and maps above and because the site is located adjacent to other Village Mixed properties and its location off US HWY 158. Further, we propose an amendment to the Future Land Use Map to show the site as Village Residential. Council Member Mike Ernst Seconded the motion. The motion was approved by a vote of four (4) in favor and none opposed.

Resolution to Apply for State Wastewater Asset Inventory Grant

Adoption of a resolution is required to apply for the grant. The grant is for \$400,000.00 with no required match from the town. The application fee is \$6,000.00 which would be expended from the Utility Fund. Council Member Melinda Szeliga made a motion to approve the resolution as presented. Council Member Mike Ernst seconded the motion. The motion was approved by a vote of four (4) in favor and none opposed.

Amend 2022 Council Meeting Schedule

Due to the Davie County Board of Elections hosting early voting on May 10, 2022 the Town Council will need to hold its Council Meeting at the Winmock Barn Loft. The Town Council has also requested changing the start of its fourth Tuesday Agenda Meetings to begin at 8:30 am starting Tuesday, May 24, 2022.

Council Member Mike Brannon made a motion to amend the meeting schedule to reflect change in location of the May 10 Council Meeting, and to move the start time of Agenda Meetings from 9 am to 8:30 am beginning May 24. Council Member Curtis Capps seconded the motion. The motion was approved by a vote of four (4) in favor and none opposed.

Town Manager/Council/Mayor Comments

Lee Rollins – Reminder of Planning Board Meeting 4/20 at 6 pm. DOT Updates re: Baltimore Road/I-40 Interchange and Hwy 158/801 Intersection Improvements

Mike Ernst – Very effective meeting. Commended Town Staff on promoting the Comprehensive Plan Survey and encouraged all in attendance to complete it if not already done. Shared that the percentage of surveys done to date is outstanding. Feels approval of zoning amendment was positive as the Town needs more rooftops.

Mike Brannon – Council Members will agree and disagree at times, and he wanted to disagree. Read a letter stating his "anger and embarrassment" over the town not mailing hard copies of the survey to each resident, and the postcards not arriving at the homes in a timely manner.

Melinda Szeliga – Thanked Glenda Smith for sharing her personal story, adding that she too was an educator at one time. Thanked Tina Smith-Goins for speaking on behalf of Kinderton Village. Thanked Fuller Land for investing in our community. Shared her thoughts on the survey, adding that she reached out to those in her HOA that may not use the computer.

Curtis Capps – Disagreed with most everything that Mike Brannon stated, adding that he knows the importance of surveys (in regards to his primary job). He stated that the Town Staff has done an excellent job in communicating – says everywhere he turns, he sees reminders to take the survey (Facebook, Instagram, Website, cards, signs...) You can't make people complete a survey; it's hard to get people to even vote. He's happy with the path that Bermuda Run has been on.

Mike Ernst – *Added that Mike Brannon was not with the Town when surveys were mailed to residents in 2017. And we have received an even better response to date than in 2017. (Deadline is May 1.)*

Rick Cross – *Encouraged everyone to spread the word about the surveys and stressed that we will strive to do a better job. Thanked all speakers, adding that Glenda Smith did a great job articulating what is needed in our community regarding mental health. Gave update regarding the Blue Heron Trail. Covid boosters at Davie Co. Health Dept. Shredding Event this Saturday. Farmers Market returns on Friday, April 22. Thanked Community Officer Mike Foster for being in attendance. Stressed that all Council and Planning Board meetings are open to the public.*

Adjourn

With no further business to discuss, Council Member Melinda Szeliga made a motion to adjourn. Council Member Curtis Capps seconded the motion. The motion was approved by a vote of four (4) in favor and none opposed.

Approved

Respectfully Submitted

Rick Cross, Mayor

Cindy Poe, Town Clerk

(7.A.)



Proclamation

National Law Enforcement Week and National Peace Officers Memorial Day

WHEREAS, In 1962 President John F. Kennedy proclaimed May 15 as National Peace Officer's Memorial Day and the week in which it fell as National Law Enforcement Week to pay special attention to those law enforcement officers who have lost their lives in the line of duty for the safety and protection of others; and,

WHEREAS, There are approximately 900,000 law enforcement officers serving in communities across the United States, including the dedicated members of the Davie County Sheriff's Department; and,

WHEREAS, Since the first recorded death in 1791, more than 20,000 law enforcement officers in the United States have made the ultimate sacrifice and been killed in the line of duty; and,

WHEREAS, National Law Enforcement Week will be observed this year from May 11 through May 17; and,

WHEREAS, Law enforcement officers are charged with pursuing justice for all individuals and performing their duties with fidelity to the constitutional and civil rights of the individuals that the law enforcement officers serve; and,

WHEREAS, The resolve of law enforcement officers in the service of their communities is unyielding, despite inherent dangers in the performance of their duties; and,

WHEREAS, The vigilance, compassion, and decency of law enforcement officers are the best defense of society against individuals who seek to do harm; and,

WHEREAS, Peace Officers Memorial Day 2022 on May 15, 2022 honors the 609 law enforcement officers who died in the line of duty during 2021, with 24 of those being officers in North Carolina; and,

WHEREAS, During the first four months of 2022, 92 law enforcement officers across the United States have made the ultimate sacrifice, with four of those being officers in North Carolina; and,

WHEREAS, All citizens of Bermuda Run should remember and recognize the men and women who serve and protect them, and keep in mind that there are law enforcement officers working in our town every hour of every day to ensure that they remain safe.

THEREFORE, BE IT RESOLVED the Bermuda Run Town Council formally recognizes May 11, 2022, through May 17, 2022, as National Law Enforcement Week, and May 15, 2022, as Peace Officers Memorial Day in the Town of Bermuda Run, and publicly salutes the service of law enforcement officers in our community and in communities across the nation.

Adopted this the 10th day of May 2022

Rick Cross, Mayor
Town of Bermuda Run

ATTEST: Cindy G. Poe
Town Clerk



(7.B.)

**NOTICE OF PUBLIC HEARING
BERMUDA RUN TOWN COUNCIL**

NOTICE IS HEREBY GIVEN, pursuant to G.S. 160D-602, that the Town Council of Bermuda Run will meet at **6:00 P.M. on Tuesday, May 10, 2022** at the WinMock at Kinderton Loft located at 168 E Kinderton Way., Bermuda Run, NC 27006, to hold a public hearing and to receive public comment on the following items:

Zoning Map Amendment 2022-04. RLM Development, LLC (Home Urban) has applied to rezone a 22.5 acre portion of a tract of land totaling approximately 64.7 acres from Commercial Mixed (CM), WS-IV Yadkin River Watershed (WS-IV) to Village Mixed, WS-IV Yadkin River Watershed (VM, WS-IV). The subject property is behind 196 and 190 NC HWY 801 N and is further described as a portion of parcel of the Davie County Tax Map C800000001.

All interested parties are invited to attend the public hearing and present their comments to the Bermuda Run Town Council. Please call the Bermuda Run Town Hall at (336) 998-0906 if you have questions or if you need special accommodations for the meeting. Hearing impaired persons desiring additional information or having questions regarding this subject should call the North Carolina Relay Number for the Deaf at 1-800-735-8262 or 711 for mobile phones.

PUBLICATION DIRECTIONS

Publish in the Notices section of the Newspaper

Publish on the following Dates:

April 28, 2022

May 5, 2022

Send bill and affidavit of publication to:

Bermuda Run Town Clerk

Town of Bermuda Run

120 Kinderton Boulevard, Suite 100

Bermuda Run, NC 27006



TO: Town Council
FROM: Planning Staff
DATE: May 10, 2022
RE: ZMA 2022-04 RLM Development, LLC

I. REQUEST

To rezone a 22.5 acre portion of a tract of land totaling approximately 64.7 acres from Commercial Mixed (CM) and WS-IV Yadkin River Watershed to **Village Mixed (VM), WS-IV Yadkin River Watershed.**

II. PROJECT LOCATION

The property is located to the rear of 196 and 190 NC HWY 801 N, off the ring road in the Lowes Foods shopping center.

III. PROJECT PROFILE

DAVIE COUNTY PARCEL NUMBER: C800000001
ZONING DISTRICT: Commercial Mixed (CM)
REQUESTED DISTRICT: Village Mixed (VM)
LAND USE PLAN: Village Residential
WATERSHED: WS-IV watershed
CROSS REFERENCE FILES: N/A
APPLICANT: RLM Development, LLC (Homes Urban)
PROPERTY OWNER: Hillsdale Group, LLC
PROPERTY SIZE: 22.5 acre (portion) of 64.7 acres.
CURRENT LAND USE: Vacant.
PROPOSED LAND USE: Multi Family development

IV. PROJECT SETTING – SURROUNDING ZONING DISTRICTS AND LAND USES

DIRECTION	LAND USE	ZONING
North	Commercial, Residential—Kinderton Village	CM, RM
West	Residential—Pinewood Lane, I-40	CM, RM
South	Commercial, Lowes Foods Shopping Center	CM
East	Commercial—State Employees Credit Union & Residential-Kinderton Village	CM, RM

Rezoning Request

The applicant RLM Development, LLC requests a rezoning from CM Commercial Mixed and to VM Village Mixed in order to develop the property for multifamily. The site is 22.5 acres. Multi Family is a permitted use in both the CM and VM zoning districts.

Existing Zoning:

Commercial Mixed district (CM and CM-CD)

(1) Intent

The Commercial Mixed (CM) district is provided to allow for the location of retail, services, offices, and civic uses essential to the everyday needs of Town residents. Residential uses may be dispersed amongst these uses as part of mixed-use buildings or multi-family residential development.

Requested Zoning:

Village Mixed District (VM and VM-CD)

(1) Intent

The Village Mixed-Use (VM) district is provided to allow for the location of shops, services, small workplaces, civic and residential buildings central to a neighborhood or grouping of neighborhoods and within walking distance of dwellings. High density residential development is encouraged to support the commercial uses within the VM district.

For your reference, the Zoning Ordinance places a cap on the number of units located within the all zoning districts in Section 9.49. These are allocated on a first come, first served basis:

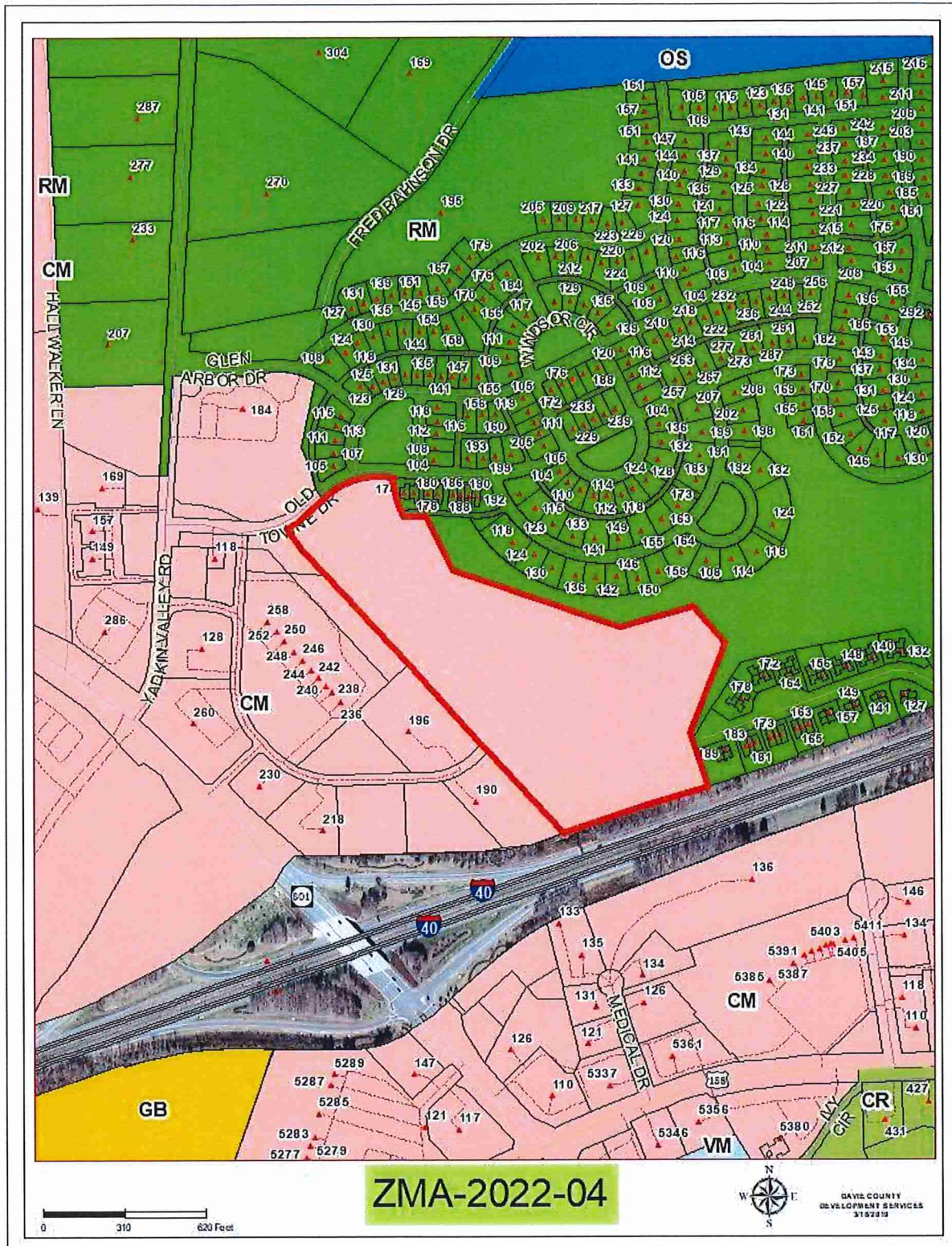
9.49 Residential, Multi-Family

- (A) The maximum number of multi-family residential units per zoning district shall not exceed the percentage shown in the table below of the maximum number of total units based on the allowable maximum dwelling units per acre. The following table shows the calculations based on the total acreage of each zoning district at the time of adoption of this subsection (November 10, 2015):

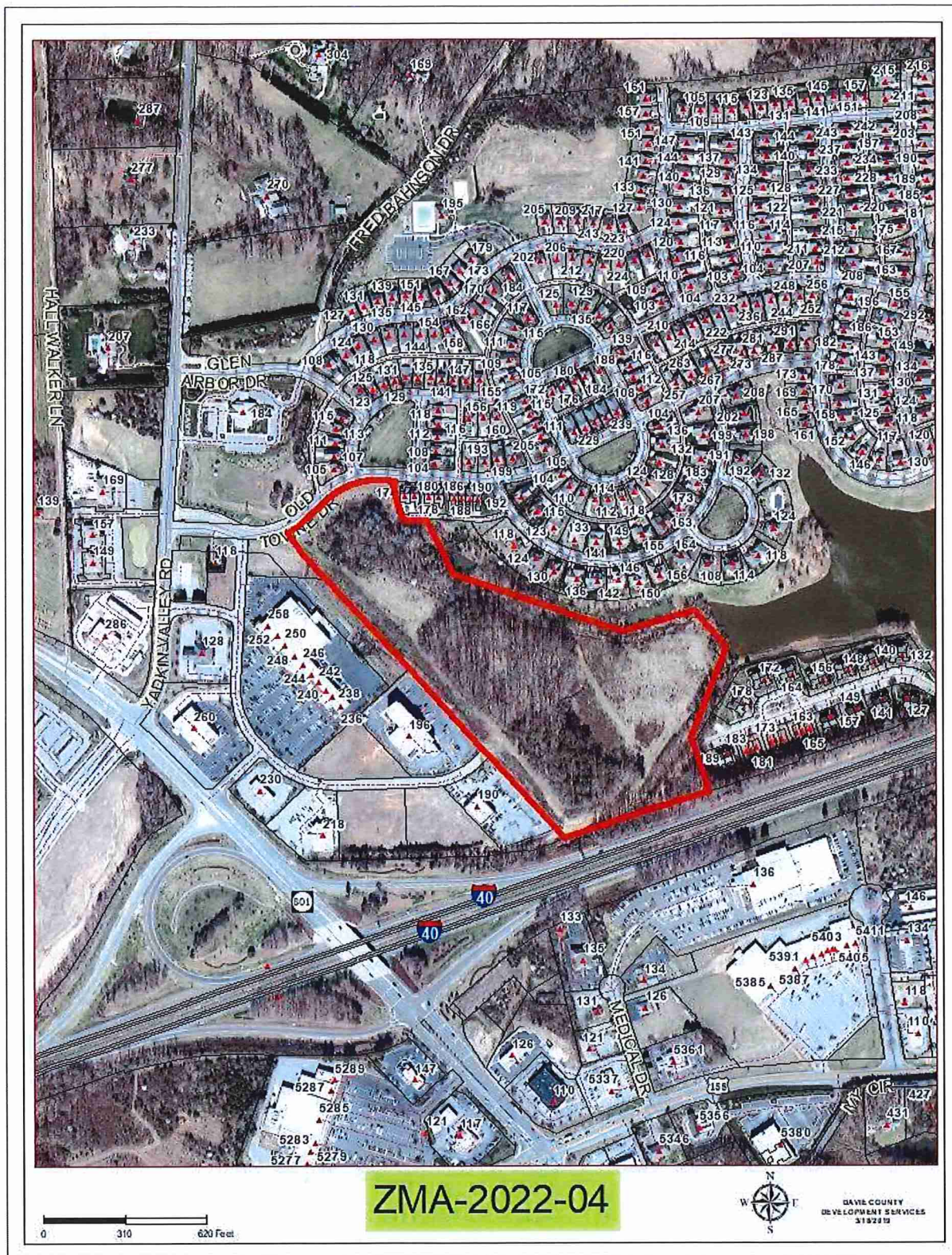
Zoning District	Total Acres	Maximum Dwelling Units per Acre (DUA)	Maximum Total Units	Maximum % of Multi-family dwelling units	Maximum Multi-family dwelling units
OS	468	3	1,404	10	140
CR	980	4	3,920	10	392
RM	415	8	3,320	20	664
CM	466	8	3,728	20	745
VM	260	15	3,900	20	780
GB	245	15	3,675	20	735
Total	2,834	n/a	19,982	n/a	3,456

Presently, 401 units have been approved for the VM zoning district and this table is scheduled to be updated in May.

V. ZONING MAP

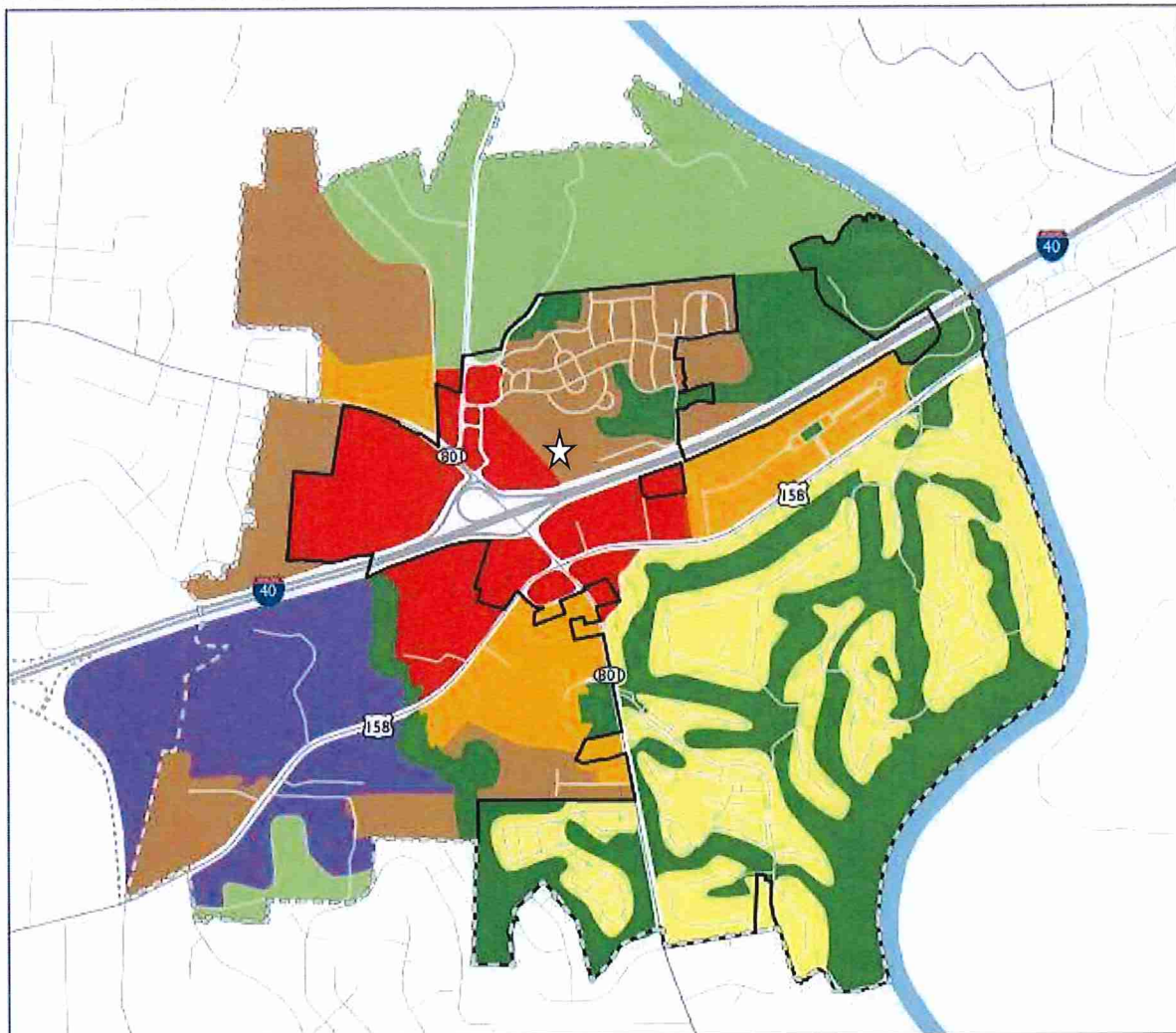


ZMA 2022-04
5/10/2022 TC Meeting Date

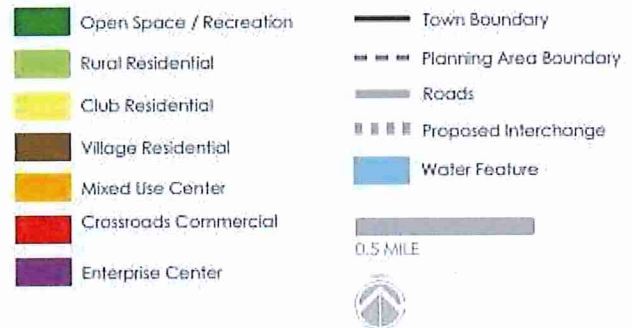


VI. FUTURE LAND USE MAP

The future land use map depicts the proposed configuration of the Town's development.



LAND USE CLASSIFICATION	ACRES	%
Open Space/Recreational	662.55	25.0%
Rural Residential	364.87	13.8%
Club Residential	492.85	18.6%
Village Residential	467.30	17.6%
Mixed Use Center	180.69	6.8%
Crossroads Commercial	256.54	9.7%
Enterprise Center	227.98	8.6%
TOTAL*	2,653	



VII. Town of Bermuda Run Comprehensive Plan

The subject property is designated as Village Residential on the Future Land Use Map in the Comprehensive Plan. The Plan states that this land use classification is *“This land use classification is primarily intended for mixed residential developments that include a variety of housing types and incorporate open space and recreational opportunities for use by the residents. Village Residential areas are located in close proximity to mixed use and commercial areas and are connected to these areas by pedestrian and/or bicycle facilities. Kinderton Village is an existing Village Residential development that is nearly built out.”*

Strategies within the Comprehensive Plan include:

Strategy 3.1 Utilize the Future Land Use Map to encourage managed growth and development that is compatible with the Town’s character, surrounding land uses and available infrastructure and services.

Strategy 3.2 Support residential growth to attract the additional retail and service amenities desired by current residents.

Strategy 4.2 Utilize building prototype designs to guide new infill and master planned development, helping to ensure architectural compatibility and cohesiveness.

Strategy 8.4 Work with property owners and developers to improve development access and connectivity with new driveways and street connections between compatible land uses, where feasible.

VIII. Issues to Consider

In considering any petition to reclassify property the Board in its recommendation and the Town Council in its decision shall consider all of the following:

- a) Whether the proposed reclassification is consistent with the purposes, goals, objectives, and policies of adopted plans for the area.
- b) Whether the proposed reclassification is consistent with the overall character of existing development in the immediate vicinity of the subject property.
- c) The adequacy of public facilities and services intended to serve the subject property, including but not limited to roadways, parks and recreational facilities, police and fire protection, hospitals and medical services, schools, stormwater drainage systems, water supplies, and wastewater and refuse disposal.
- d) Whether the proposed reclassification will adversely affect a known archaeological, environmental, historical, or cultural resource.
- e) **When considering a petition to reclassify property to a general-use district, the Planning Board and the Town Council shall not evaluate the petition based on any specific proposal for the use of the property or design of the site.**

X. Planning and Board Recommendation

The Planning Board heard the request at their April 20th meeting and voted to recommend denial of the request with a vote of four in favor and one opposed (4-1). Please see attached draft Planning Board meeting minutes.

XI. Board Action

Following the public hearing, the Council is requested to take action following a motion and a second for one of the items below:

- **Approval:** The Board finds that the proposed general use rezoning is consistent with the Town of Bermuda Run Comprehensive Plan policies, specifically the objective to encourage managed growth and development that is compatible with the Town's character, surrounding land uses and available infrastructure and to support residential growth to attract additional retail and service amenities desired by current residents.
Therefore, we find this zoning amendment is reasonable and in the public interest because it supports the Comprehensive Plan policies and maps above and because the site is designated on the Future Land Use Map Village Residential that is primarily intended for mixed residential developments that include a variety of housing types and the site is located between commercial and residential uses.
- **Denial:** The Board finds that the general use zoning map amendment is not consistent with the Town of Bermuda Run Comprehensive Plan because the site is not compatible with surrounding land uses. Therefore, we find this zoning map amendment is unreasonable and not in the public interest because it does not support the Comprehensive Plan policies above and due to...
- **Defer:** The amendment needs additional consideration.

Attachments:

- Application
- Labels & map of notified property owners
- Boundary survey



TOWN OF BERMUDA RUN

120 Kinderton Blvd., Suite 100 • Bermuda Run, NC 27006 • Phone 336-998-0906 • Fax 336-998-7209

Land Development Application-Please fill out completely, or application will not be processed.

(updated 1/10/13)

Case #:

1. Application Type

Subdivision: ☒ Fee _____
Major Subdivision
Sketch Plan ☐ _____
Preliminary Plat ☐ _____
Construction Plans ☐ _____
Final Plat ☐ _____
Minor Subdivision
Final Plat ☐ _____

Site Plans:
Level II Site Plan ☐ _____

Board Review Items:

Rezoning (Map Amendment) ☒ Fee **\$1,100**
Standard Rezoning ☐ _____
Conditional District Rezoning ☐ _____
Text Amendment ☐ _____
Special Use Permit ☐ _____
Design Waiver: ☐ _____
Other: _____ ☐ _____

Fee Total **\$1,100**

2. Project Information

Date of Application 3/21/2022 Name of Project Kinderton Multifamily Phase # _____
Location Bermuda Run Property Size (acres) 22.5 # of Units (residential) 270
Current Zoning Commercial Mixed (CM) Proposed Zoning Village Mixed Use (VM)
Current Land Use Vacant Land Proposed Land Use Multifamily Residential
Tax Parcel Number(s) A portion of Pin # 5872662604

3. Contact Information

RLM Development LLC (doing business as Homes Urban); Contact: Robert Morgan
Developer
988 Equestrian Drive, Mount Pleasant, SC 29464
Developer Address City, State Zip
843-860-5676 robert.morgan@homesurban.com
Telephone Fax
PL Robert Morgan 03/21/2022
Signature Print Name Date

Seamon Whiteside
Agent (Registered Engineer, Designer, Surveyor, etc.)
1111 Metropolitan Avenue, Suite 1050
Address
Charlotte, NC 28204
City, State Zip
980-312-5450
Telephone Fax

Signature Print Name Date

Hillsdale Group, LLC

Property Owner
600 Hwy 801S
Address
Advance, NC 27006
City, State Zip
336-413-9519
Telephone Fax

Signature Print Name Date

Kinderton Multifamily Rezoning Application

4(a) – Briefly explain the nature of this request:

RLM Development (doing business as Homes Urban) kindly asks the Town of Bermuda Run to consider rezoning a portion of PIN #5872662604 from Commercial Mixed (CM) to Village Mixed Use (VM). The site is currently vacant land located behind the Lowes Foods anchored retail center (Kinderton Place) on NC Highway 801. The site can be accessed via two locations: the Kinderton Place center and Old Towne Drive. The reason for this request is our interest in constructing a multifamily rental community on the site.

4(c) – For all rezonings and text amendment: Provide a statement regarding the consistency of this request with the Comprehensive Plan and the surrounding land uses.

The surrounding land uses to the site are Kinderton Place to the east, Interstate 40 to the south, and Kinderton Village to the north and east. Kinderton Place is a grocery store anchored retail center with outparcels that contain restaurants, a hotel, a fuel station, and other uses. Within Kinderton Place, the uses directly facing the proposed multifamily community are the rear of the grocery strip center, a Hampton Inn, and a La Carreta Restaurant. Uses abutting the proposed multifamily community in Kinderton Village include townhomes, single family homes, ponds, and 8-plex housing units. The multifamily community will be separated from Kinderton Place by an existing Duke power easement and separated from directly abutting most of Kinderton Village by a homeowner's association owned buffer.

The original Kinderton Village master plan shows the use of the proposed multifamily community as an office park. While this use could still be a viable development option, the proposed multifamily community will be a better land-use transition between the intensely trafficked retail center and the Kinderton Village residential neighborhood. Transitioning from the moderate density of an apartment community to the primarily single-family Kinderton Village neighborhood is a widely accepted land-use planning strategy. In addition, the original Kinderton Village land-use plan contained multifamily housing within its bounds. From an aesthetic standpoint, an impervious soil standpoint, and a traffic standpoint, the proposed multifamily housing use is a more appropriate adjacent use to Kinderton Village than office, medical office, or shopping center (which are all uses allowed under the current CM zoning).

With respect to the Bermuda Run Comprehensive Plan and Future Land Use Map that were adopted in 2017, this multifamily residential community will provide an additional type of housing that is in demand but not readily available. This, in turn, will provide more residents for Bermuda Run that will drive additional retail and service amenities. Since several retail and service amenities are walkable to the multifamily community, residents will be able to walk or bike to them and not have to use their automobiles. Filling in this missing gap in Kinderton Village with a Village Residential use per the Comprehensive

Plan will finalize the original intent of the masterplan to have a walkable community with diverse housing types accessible to retail and service amenities.

Specific policies and goals contained in the Comprehensive Plan that will be met once this site is zoned VM include:

- Strategy 1.1 – “Embrace the unique character of areas of the Town while tying them together with unifying architectural elements, signage, landscaping, pedestrian connections, vehicular connections, and geographic nomenclature.”
 - The multifamily community will provide an appropriate intermediate land-use between Kinderton Place and Kinderton Village that will fill this gap within this community using connectivity and contextual architecture. The land use from retail center, to multifamily housing, to single family housing will reinforce the planned village atmosphere, and “embrace small-town charm” as Objective 1 states.
- Strategy 3.1 – “Utilize the Future Land Use Map to encourage managed growth and development that is compatible with the Town's character, surrounding land uses, and available infrastructure and services.”
 - The Future Land Use Map calls for Village Residential for this site. Village Residential is “intended for mixed residential developments that include a variety of housing types and incorporate open space and recreational opportunities for use by the residents.” Village Mixed Use zoning for this site will accomplish several components of this strategy. It will allow multifamily residential development to occur where infrastructure and services are readily available. It will create another type of housing that is not available in the Kinderton Village community - rental multifamily housing. Finally, the site will be walkable to existing services and will contain an internal pedestrian network as well as multiple recreational activities for its residents.
- Strategy 3.2 – “Support residential growth to attract the additional retail and service amenities desired by current residents.”
 - The development of this site under Village Mixed Use will provide a population boost to the north side of Interstate 40 and will create support for existing retail and services, plus add demand for new retail and services. With infrastructure improvements in place along NC Highway 801, this is an appropriate area for both residential and retail growth to occur.
- Strategy 3.3 – “Continue to work with Davie County Economic Development Commission (EDC) to facilitate business retention and the development, redevelopment, or reuse of vacant properties, including participation in road infrastructure improvements.”
 - The intended housing type will diversify the Town's housing stock allowing more people to live close to where they work. It is critical as new businesses consider locating in Bermuda Run that a diverse slate of housing options are readily available.
- Strategy 4.2 – “Utilize building prototype designs to guide new infill and master-planned development, helping to ensure architectural compatibility and cohesiveness.”

- Great sensitivity will be provided to ensure that the site design and vertical architectural design are contextual and additive to Kinderton Village community and the Town of Bermuda Run. The designs will be consistent with the goals noted in the Comprehensive Plan.
- Objective 10 – “Become a recognized center of excellence for medical services, and attract business entrepreneurship.”
 - Similar to Strategy 3.3, with the desire to support Wake Forest Baptist Health and create an “innovative enterprise business zone,” convenient housing options will need to be available as these businesses expand. Furthermore, a walkable/bikeable housing option for Wake Forest Baptist Health employees will provide a healthy and alternative mode of transportation to their workplace.



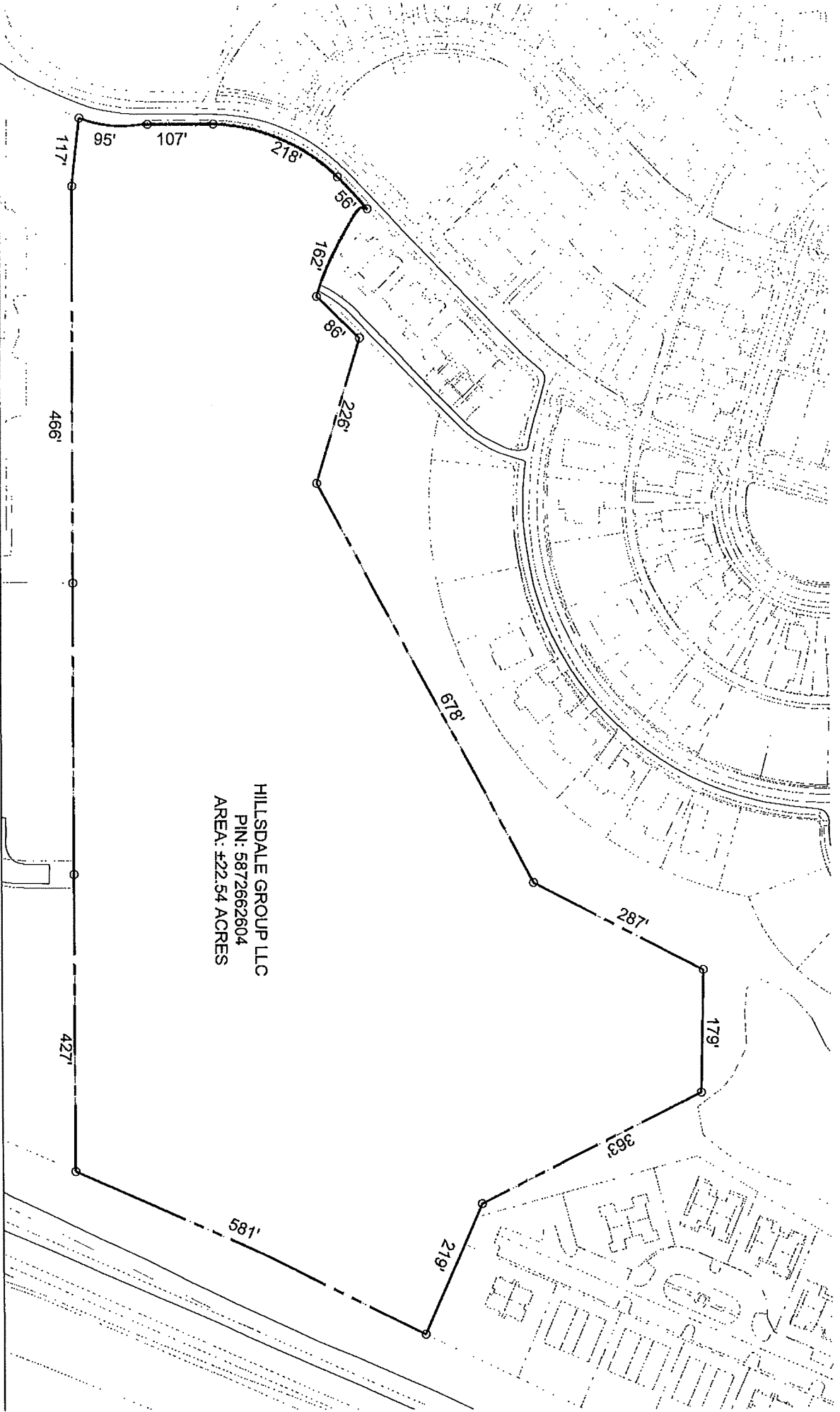
NOTE: THIS PLAN IS CONCEPTUAL, IN NATURE AND SUBJECT TO CHANGE.



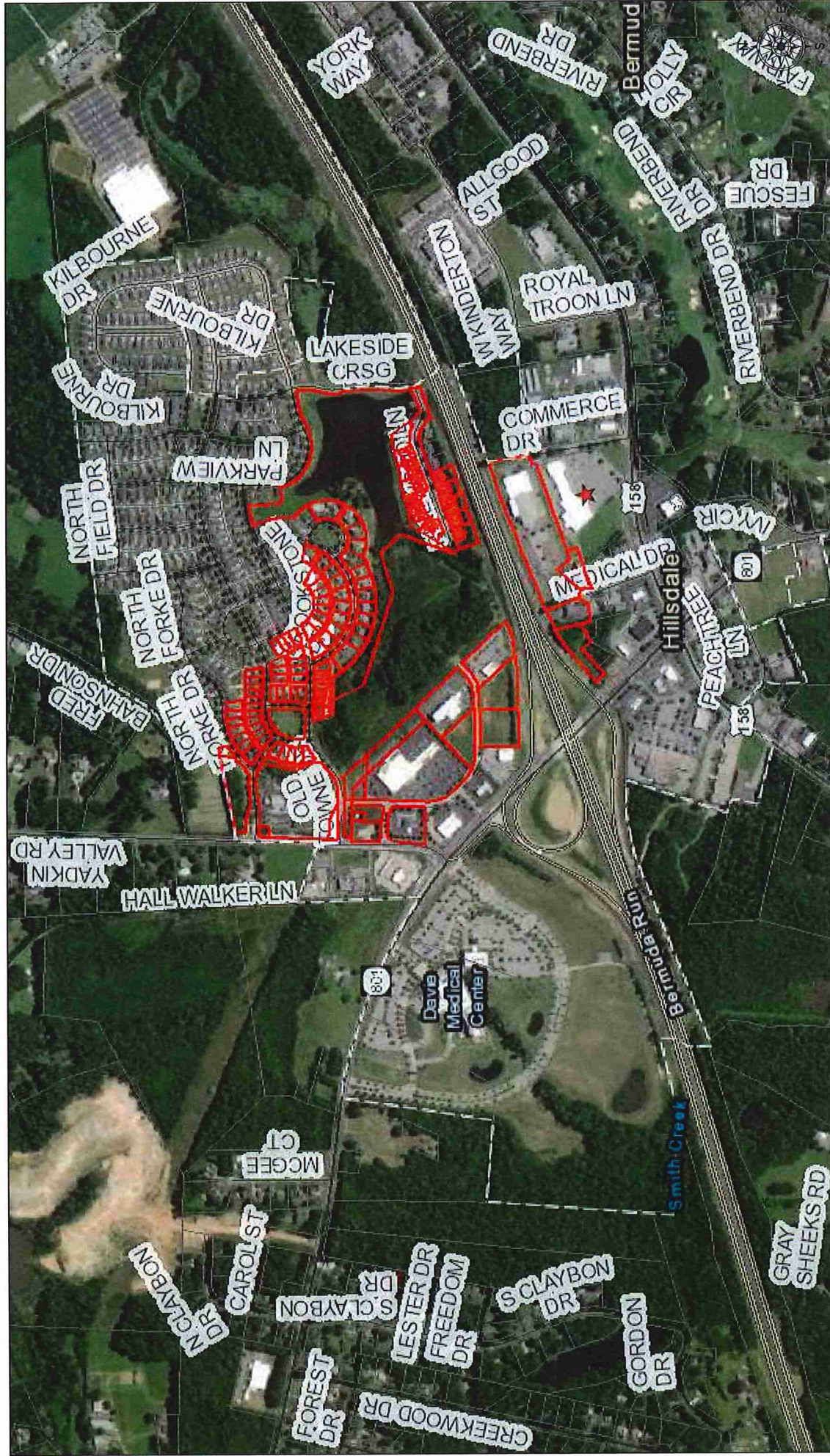
PRELIMINARY BOUNDARY MAP

HOMES URBAN
BERMUDA RUN, NC
PROJECT 12451 M&M 03/23/2022

HILLSDALE GROUP LLC
PIN: 5872662604
AREA: ±22.54 ACRES



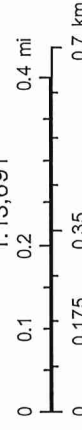
Mailing Letters Map



March 25, 2022

- Address
- Driveways
- Parcels
- Special Uses & Variances
- Watershed Structure

1:13,691



Source: Esri, Maxar, GeoEye, Earthstar Geographics, CNES/Airbus DS, USDA, USGS, AeroGRID, IGN, and the GIS User Community
Esri, HERE, Garmin, (c) OpenStreetMap contributors, and the GIS user community

YADKIN VALLEY TELEPHONE MEMB
PO BOX 368

YADKINVILLE, NC 27055-0000

BARABE DAVID J
247 GRIFFITH ROAD

ADVANCE, NC 27006-8731

FUQUA JENNIFER DOLAN
175 PINEWOOD LN # 6

BERMUDA RUN, NC 27006-8778

MECHAM BRENDA B
135 TOWNPARK DRIVE

BERMUDA RUN, NC 27006-0000

ROSEBORO LEISHA D
160 TOWNPARK DRIVE

BERMUDA RUN, NC 27006-0000

BURT ERIC H
113 TOWNPARK DRIVE

BERMUDA RUN, NC 27006-0000

WELCH DONALD B
199 OLD TOWNE DRIVE

BERMUDA RUN, NC 27006-8609

REAGAN SUSAN
108 GREENWAY STREET

BERMUDA RUN, NC 27006-0000

CONDOMINIUMS AT KINDERTON VILL
C/O DONALD M VONCANNON
118 Cherry St
KERNERSVILLE, NC 27284-0000

AARON ROGER
130 NORTH FORKE DRIVE

BERMUDA RUN, NC 27006-0000

JONES JOHN W
118 NORTH FORKE DRIVE

BERMUDA RUN, NC 27006-0000

KENNEDY JUSTIN G
105 TOWNPARK DRIVE

BERMUDA RUN, NC 27006-0000

BALLINGER CHRISTOPHER N
124 LAKEPOINT DRIVE

BERMUDA RUN, NC 27006-0000

SUN CHAO-HSIN
114 LAKE POINT DRIVE

BERMUDA RUN, NC 27006-0000

LAIL DONALD R
142 BROOKSTONE DRIVE

BERMUDA RUN, NC 27006-0000

SCHMIDT HERBERT L
136 BROOKSTONE DRIVE

BERMUDA RUN, NC 27006-0000

BUTLER ELEANOR B
111 AVALON STREET

BERMUDA RUN, NC 27006-0000

NOVANT HEALTH INC
2085 FRONTIS PLAZA BOULEVARD

WINSTON SALEM, NC 27103-0000

PRZYBYLOWICZ KATE LIN
183 PINEWOOD LN

BERMUDA RUN, NC 27006-8778

MYERS MICHAEL L
148 PINEWOOD LANE

BERMUDA RUN, NC 27006-0000

CREWS DAVID RAY
148 PINEWOOD LANE UNIT 104

BERMUDA RUN, NC 27006-8637

LITTLE REBECCA J
172 PINEWOOD LANE #101

BERMUDA RUN, NC 27006-0000

TOMALLO MELISSA DAWN
189 PINEWOOD LANE UNIT 104

BERMUDA RUN, NC 27006-0000

HOWARD CHRISTIN
157 PINEWOOD LANE #102

BERMUDA RUN, NC 27006-0000

LOWREY BRIAN PETER
181 PINEWOOD LN

BERMUDA RUN, NC 27006-8778

WHITE ANDREW T
174 OLD TOWNE DRIVE

BERMUDA RUN, NC 27006-0000

HEAD FRANCES L
180 OLD TOWNE DRIVE

BERMUDA RUN, NC 27006-8609

OWINGS JAMES R
3846 NC HIGHWAY 801 SOUTH

BERMUDA RUN, NC 27006-7115

CALVARY BAPTIST CHURCH OF W-S
5000 COUNTRY CLUB ROAD

WINSTON SALEM, NC 27104-0000

FRAZIER & BEESON INVESTMENTS
134 MEDICAL DRIVE

BERMUDA RUN, NC 27006-0000

THORNTON JENNIFER WARREN
141 BROOKSTONE DRIVE

BERMUDA RUN, NC 27006-0000

WARREN MICHELLE A
163 BROOKSTONE DRIVE

BERMUDA RUN, NC 27006-0000

KINDERTON VILLAGE TOWNHOMES
PO BOX 2325

ADVANCE, NC 27006-0000

DIRKS BETH M
253 HOLLY LANE

MOCKSVILLE, NC 27028

JESSEE REBECCA R
189 OLD TOWNE DRIVE

BERMUDA RUN, NC 27006-0000

HEWITT TREVOR WILSON
179 PINEWOOD LN

BERMUDA RUN, NC 27006-8778

SERENA COLLEEN A
171 PINEWOOD LN # 4

BERMUDA RUN, NC 27006-8778

HUDSON MATTHEW RYAN
124 BROOKSTONE DRIVE

ADVANCE, NC 27006

BLANTON SHEILA L
156 PINEWOOD LANE #104

BERMUDA RUN, NC 27006

HARRIS LARRY J
189 PINEWOOD LANE #101

ADVANCE, NC 27006

HINSHAW DIANNE G
107 BROOKSTONE DRIVE

BERMUDA RUN, NC 27006

PEREZ FRANCISCO
138 NORTH FORKE DRIVE

BERMUDA RUN, NC 27006-0000

CORBETT WILLIAM F
109 AVALON STREET

BERMUDA RUN, NC 27006

MOORE DAVID R & SANDRA L HARRIS LIV
TRST
173 BROOKSTONE DRIVE

BERMUDA RUN, NC 27006

HODGE CURTIS A
193 OLD TOWNE DRIVE

BERMUDA RUN, NC 27006

PIEDMONT FEDERAL SAVINGS BANK
201 SOUTH STRATFORD ROAD

WINSTON SALEM, NC 27103

REID STEPHEN
108 NORTH FORKE DRIVE

ADVANCE, NC 27006

PALMORE LEE ELAINE
125 TOWNPARK DRIVE

BERMUDA RUN, NC 27006-0000

BAHNSON MARY LOUISE
C/O BURT B BAHNSON
2078 Hwy 801 N
MOCKSVILLE, NC 27028

KINDERTON VILLAGE SINGLE FAM
1338 ASHLEY SQUARE

WINSTON SALEM, NC 27103-0000

HILLSDALE GROUP LLC
600 HWY 801 S

ADVANCE, NC 27006

SINK JEAN S
115 BROOKSTONE DRIVE

BERMUDA RUN, NC 27006

BURNS WADE S
434 PEOPLES CREEK RD

ADVANCE, NC 27006-0000

BRAVO FRANK JOSEPH II
112 SWEETWATER CIRCLE

BERMUDA RUN, NC 27006

COPE JUANITA M
131 TOWNPARK DRIVE

BERMUDA RUN, NC 27006

REID BEVERLY A
133 TOWNPARK DRIVE

ADVANCE, NC 27006

BRYDGES CHARLES H IRREV TRUST
176 OLD TOWNE DRIVE

BERMUDA RUN, NC 27006

HIX WILLIAM THOMAS
188 OLD TOWNE DRIVE

BERMUDA RUN, NC 27006

KAIMAN SANDRA
148 NORTH FORKE DRIVE

BERMUDA RUN, NC 27006-0000

CLEMENTS PATRICIA H
149 BROOKSTONE DR

BERMUDA RUN, NC 27006-8613

HORNE MICHAEL ALWYN
133 BROOKSTONE DR

BERMUDA RUN, NC 27006-8613

AKERS CHARLES C JR
112 GREENWAY STREET

BERMUDA RUN, NC 27006

BAITY BONNIE H
156 BROOKSTONE DR

BERMUDA RUN, NC 27006-8613

WARD RICHARD T
183 BROOKSTONE DRIVE

BERMUDA RUN, NC 27006

NESTOR ANGELA P
124 SYCAMORE PARK LANE

BERMUDA RUN, NC 27006

STANLEY JONATHAN M
145 TOWN PARK DRIVE

BERMUDA RUN, NC 27006

BRENNAN LISA F
178 OLD TOWNE DR

BERMUDA RUN, NC 27006-8609

MORRIS GREGORY KEVIN
141 TOWN PARK DR

BERMUDA RUN, NC 27006-8605

DESLOGES LANA M
114 SWEETWATER CIRCLE

BERMUDA RUN, NC 27006

BRENNER CAROL F
172 PINWOOD LN UNIT 104

ADVANCE, NC 27006-8643

THE CONDOMINIUMS AT KINDERTON
VILLAGE OWNERS ASSO
% PRIESTLY MANAGEMENT
PO Box 4408
GREENSBORO, NC 27404

BARR DEBORAH ANN
173 PINWOOD LN # 5

BERMUDA RUN, NC 27006-8778

MEACHUM AUTUMN LYNN
163 PINWOOD LN # 1

BERMUDA RUN, NC 27006-8778

STATE EMPLOYEE'S CREDIT UNION
PO BOX 26807

RALEIGH, NC 27611-6807

WILSON LAUREN ELIZABETH
178 PINWOOD LN UNIT 103

BERMUDA RUN, NC 27006-8645

BRIGGS KIMBERLY
165 PINWOOD LN

BERMUDA RUN, NC 27006

PARAJELES MONZERRAT MESALLES
167 PINWOOD LN

BERMUDA RUN, NC 27006

AMH NC PROPERTIES LP
23975 PARK SORRENTO STE 300

CALABASAS, CA 91302-4012

FORREST ALVIS E
131 CEDARPARK DR

ADVANCE, NC 27006-7363

MILLER KATINA
116 GREENWAY ST

BERMUDA RUN, NC 27006-8608

LIVENGOOD BETTY B
110 SWEETWATER CIR

ADVANCE, NC 27006-8612

TOMPKINS DOUGLAS S
157 PINWOOD LN #104

BERMUDA RUN, NC 27006-8789

BAILEY STEPHEN W
144 N FORKE DR

BERMUDA RUN, NC 27006-8602

HOWARD INARA M
108 LAKEPOINT DR

BERMUDA RUN, NC 27006-8615

DAUBENSCHMIDT KURT
124 N FORKE DR

Advance, NC 27006

WEATHERS GAIL D
PO BOX 545

STANLEY, NC 28164-0545

LWS HOLDINGS LLC
6570 SHALLOWFORD RD

LEWISVILLE, NC 27023

ESKEW ELIZABETH
118 SWEETWATER CIR

BERMUDA RUN, NC 27006-8612

LOFTON THOMAS O JR
130 BROOKSTONE DR

ADVANCE, NC 27006-8613

LOWERY SHARON H
230 REGAL RD

CLOVER, SC 29710-0000

BRALLEY AMANDA N
155 TOWN PARK DR

BERMUDA RUN, NC 27006-8605

STEFANICK RONALD STEVEN
111 TOWN PARK DR

BERMUDA RUN, NC 27006-8605

COOPER TROYE A
115 TOWN PARK DRIVE

BERMUDA RUN, NC 27006

MORRISON SHANDA M
147 TOWN PARK DR

BERMUDA RUN, NC 27006-8605

KMN LLC
234 SYCAMORE RIDGE DR

BERMUDA RUN, NC 27006-7477

BURNFAM LIMITED PARTNERSHIP
4007 COUNTRY CLUB RD STE A

WINSTON SALEM, NC 27104-3766

DILLING NATHAN
104 SWEETWATER CIR

BERMUDA RUN, NC 27006-8612

PFUNDSTEIN MARK G
155 BROOKSTONE DR

ADVANCE, NC 27006-8613

EASTWOOD CONSTRUCTION PARTNERS
LLC
3980 PREMIER DR STE 120

HIGH POINT, NC 27265-8410

EDGAR KRISTEN JOAN
172 PINWOOD LN UNIT 103

BERMUDA RUN, NC 27006-8643

GENAWAY STEPHEN
150 BROOKSTONE DR

BERMUDA RUN, NC 27006-8613

TURNER BARBARA N
192 OLD TOWNE DR

BERMUDA RUN, NC 27006-8609

KING TYLER
115 AVALON STREET

BERMUDA RUN, NC 27006

COWAN TIFFANY R
164 PINWOOD LN UNIT 103

Advance, NC 27006

CLODFELTER MACKENZIE K
104 GREENWAY ST

BERMUDA RUN, NC 27006-8608

CARTER JILL KRISTIN
137 TOWN PARK DR

BERMUDA RUN, NC 27006-8605

LUCAS MELISSA C
105 AVALON ST

BERMUDA RUN, NC 27006-8601

SPYCHALSKI CHESTER A
190 OLD TOWNE DR

BERMUDA RUN, NC 27006-8609

GAGLIAN JAMES A
148 PINWOOD LN UNIT 101

BERMUDA RUN, NC 27006-8637

LAPORTE KATHRYN ADAMS
120 SWEETWATER CIR

BERMUDA RUN, NC 27006-8612

FOSTER RONALD JR
156 PINWOOD LN UNIT 101

BERMUDA RUN, NC 27006-8639

JORDAN JAMES PHILIP
118 LAKEPOINT DR

BERMUDA RUN, NC 27006-8615

BARNETT MARY E
189 PINWOOD LANE UNIT #103

BERMUDA RUN, NC 27006

ADVANCE (KINDERTON) UY LLC
%WALGREEN CO
8816 Six Forks Rd STE 201
RALEIGH, NC 27615-2983

LANDRETH MICHAEL
205 OLD TOWNE DRIVE

BERMUDA RUN, NC 27006

HPA BORROWER 2018-1 MS LLC
120 S RIVERSIDE PLZ STE 2000

CHICAGO, IL 60601

COLLINS BILLIE W ETAL
186 OLD TOWNE DR

ADVANCE, NC 27006-8609

FKH SFR C2 LP
% FIRST KEY HOMES LLC
1850 Parkway Pl SE STE 900
MARIETTA, GA 30067-8261

HUNDLEY SHELLEY
146 BROOKSTONE DR

ADVANCE, NC 27006-8613

ALDEN DAWN MARIE
148 PINWOOD LN UNIT 103

BERMUDA RUN, NC 27006-8637

YOUNG STEVEN L
189 PINWOOD LN UNIT 102

BERMUDA RUN, NC 27006-8796

ALLEGACY FEDERAL CREDIT UNION
1691 WESTBROOK PLAZA DRIVE

WINSTON SALEM, NC 27103

GROCE LINDA WILLIAMS
156 TOWNPARK DRIVE

BERMUDA RUN, NC 27006

SHIN SEUNG AE
164 PINWOOD LANE #104

BERMUDA RUN, NC 27006-0000

SNYDER JOHN H JR
178 PINWOOD LANE UNIT 102

BERMUDA RUN, NC 27006-0000

HALL TAMMY S
178 PINWOOD LANE

BERMUDA RUN, NC 27006-0000

CLAPHAM BARBARA B
140 RIVER ROAD

ADVANCE, NC 27006-7640

KINDERTON INN LLC
1500 SYCAMORE ROAD

MONTOURSVILLE, PA 17754-0000

CARTER CRAIG A JR
123 BROOKSTONE DRIVE

BERMUDA RUN, NC 27006

LUFFMAN ROBERT
172 PINWOOD LN UNIT 102

ADVANCE, NC 27006

JORDAN LAURA R
156 PINWOOD LANE

ADVANCE, NC 27006

GEYER ROBERT ROY
118 BROOKSTONE DR

ADVANCE, NC 27006

ROBERTSON KIMBERLY N
156 PINWOOD LANE #103

BERMUDA RUN, NC 27006

ADVANCE GROUP LLC
2325 SOUTH STRATFORD RD

WINSTON SALEM, NC 27103

Bermuda Run Planning Board/Board of Adjustment
Regular Meeting
Minutes

Wednesday, April 20, 2022

3:00 PM

Bermuda Run Town Hall

I. Call to Order

Attendee Name	Title	Status
Tom Brady	Board Member	Present
Bryan Thompson	Alternate Member	Present
Lynn Senger	Vice Chairman	Present
Rod Guthrie	Chairman	Present
David Strand	Board Member	Absent
Erin Shea	Regular Member	Absent
Tony Krasienko	Alternate Member	Present

II. Recognition of Quorum

The Chairman recognized that a quorum was met with five members present.

III. Approval of Planning Board Amended Agenda

The Chairman proposed removing item 8a at the request of the applicant and moving the public comment period after the introduction of the zoning map amendment.

RESULT: **APPROVED [UNANIMOUS]**
MOVER: Lynn Senger
SECONDER: Tom Brady
AYES: Krasienko, Guthrie, Brady, Thompson, Senger
ABSENT: Strand, Shea

IV. Approval of Planning Board Minutes—March 16, 2022

RESULT: **APPROVED [UNANIMOUS]**
MOVER: Tony Krasienko
SECONDER: Lynn Sender
AYES: Krasienko, Guthrie, Brady, Thompson, Senger
ABSENT: Strand, Shea

V. Permit Reports & Zoning Administrator's Update

Permit reports & zoning update were included in the agenda packet for reference and discussion.

VI. Town Manager's Update

Lee Rollins updated the Board and audience of the next steps of the zoning process including the April 26th and May 10th Town Council meetings and informed the Board all emails received on behalf of ZMA 2022-04 have been forwarded to them.

VII. Planning Board Cases

Zoning Map Amendment 2022-04. RLM Development, LLC (Home Urban) applied to rezone a 22.5 acre portion of a tract of land totaling approximately 64.7 acres from Commercial Mixed (CM), WS-IV Yadkin River Watershed (WS-IV) to Village Mixed, WS-IV Yadkin River Watershed (VM, WS-IV). The subject property is behind 196 and 190 NC HWY 801 N and is further described as a portion of parcel of the Davie County Tax Map C800000001.

Chairman Guthrie opened the public comment period.

1. Robert Morgan, the applicant outlined the request, highlighting compliance with the Comprehensive Plan and Map including offering diverse housing choices and the village residential designation on the Future Land Use Map, the transition from commercial to residential uses on both sides of the subject property, and existing buffers.

The Board asked questions of the applicant including existing density and the use of multi family, other Village Mixed zoned properties within the town, required amount of parking for a multi family project, and access to the site.

2. Pat Russell, 117 Parkview Lane, spoke in opposition to the request due to traffic concerns, access to Kinderton Village amenities, home values, and the quality of life of residents within Kinderton Village.
3. Paul Dixon, 120 Kilbourne Drive, spoke of concerns of population increase, detrimental impacts to Kinderton Village, existing issues with water runoff and traffic and the current density requirement for the subject property.
4. Matt Hudson, 124 Brookstone Drive, spoke in opposition to the request due to the increase in density and protecting the town's uniqueness.
5. Patricia Williams, 124 Parkview Lane, spoke in opposition due to noise.
6. Melissa Tomallo, 189 Pinewood Lane Unit 104, spoke in opposition due to existing water runoff and flooding problems.
7. Tina Smith-Goins, 118 Pendleton Drive, spoke about existing water issues and the current zoning approved uses.
8. Matt Carr, 136 Sweetwater Circle, spoke about concerns of designs for multi family projects including garden, luxury and retail on bottom floor styles.
9. Diane Pfundstein, 155 Brookstone Drive, spoke in opposition and submitted a petition featuring 252 signatures of Kinderton Village residents citing concerns of increased density, water runoff, property values, traffic, access to Kinderton Village amenities, and impacts to schools.
10. Fred Delugas, 109 Sycamore Park Lane, asked questions outside the rezoning request regarding the Blue Heron Trail and the speed limit change on US HWY 158.
11. Sharon Anderson, 134 Millstone Lane, spoke in opposition to the request and provided the Board photos of Kinderton Village citing concerns for the existing neighborhood and natural buffers and against the increase in density.

12. Kim Schutz, 108 Kilbourne Drive, spoke in opposition and requested a traffic study.
13. Timothy Deegan, 353 Town Park Drive, spoke in opposition citing density, traffic, existing water runoff and flooding problems, and access onto US HWY 801 from the shopping center.
14. Angel Jackson, 119 Lakeside Crossing, spoke in opposition due to damage to the ponds, water issues, traffic and access to the Kinderton Village amenities.
15. Lennie Ring, 125 Kilbourne Drive, spoke in opposition citing stormwater issues, lack of compliance with policy 7.1 of the Comprehensive Plan and request for an environmental study.
16. Herb Schmidt, 136 Brookstone Drive, spoke in opposition due to drainage concerns, home values, existing noise from I-40, high density, and viewshed from Kinderton Village.
17. Mark Pfundstein, 155 Brookstone Drive, represented the master homeowners association for Kinderton Village and spoke in opposition citing home values, traffic, runoff, the submitted petition, and past flooding issues.

Robert Morgan, the applicant, spoke about the proposed project being similar in type to Comet Apartments, the scale of housing types existing within Kinderton Village including townhomes and condos and a desire to work with the community and residents.

Chairman Guthrie closed the public comment period and called for a motion.

Lynn Senger made a motion to deny with the following statement, the Planning Board finds that the general use zoning map amendment is not consistent with the Town of Bermuda Run Comprehensive Plan because the site is not compatible with surrounding land uses. Therefore, we find this zoning map amendment is unreasonable and not in the public interest because it does not support the Comprehensive Plan policies above and due to the thought and effort put into developing and updating the Town's Zoning Ordinance and the request would result in changes to the Town's dynamic and reasons why people move here.

RESULT:	DENIED [4-1]
MOVER:	Lynn Senger
SECONDER:	Bryan Thompson
AYES:	Krasienko, Senger, Thompson, Brady
NAYS:	Guthrie
ABSENT:	Strand, Shea

VIII. Other Business

There was none

IX. Board Member Comments

Bryan Thompson spoke of previous requests for zoning and text amendments the Planning Board has voted to recommend and encouraged the audience to attend the Town Council meetings.

Tony Krasienko spoke in support of the Comprehensive Plan and Ordinances and the need for residential projects and encouraged people to be aware of their surrounding properties.

X. Adjournment

RESULT:	ADJOURNMENT [UNANIMOUS]
MOVER:	Lynn Senger
SECONDER:	Tom Brady
AYES:	Krasienko, Guthrie, Brady, Thompson, Senger
ABSENT:	Strand, Shea



(7.C.)

**Budget Message
2022-2023 Fiscal Year**

May 10, 2022

The Honorable Rick Cross, Mayor
Members of the Town Council
Bermuda Run, North Carolina

Pursuant to Section 159-11 of the North Carolina General Statutes, I am pleased to present the recommended budget for the fiscal year beginning July 1, 2022 and ending June 30, 2023 for your review and consideration. A public hearing is required to allow town residents an opportunity to provide public comment on the proposed budget, before final adoption by the Town Council no later than June 30, 2021. I recommend a public hearing to consider the proposed budget be set for Tuesday, June 14, 2022 at 6:00PM at Town Hall.

The Town of Bermuda Run operates three funds: The General Fund, the Gate Operations Fund and the Utilities Fund.

The **General Fund**, which is the basic operating fund for Town services, is proposed to be balanced at **\$1,934,000**. The Town Charter has capped the maximum property tax rate allowed at fifteen cents per one-hundred dollars of valuation. I am proposing the tax rate to remain unchanged at the historic level of fifteen (0.1500) cents per one-hundred dollars of valuation. Any increase in the tax rate beyond fifteen cents would require a vote of the town residents through a referendum.

General Fund Revenue Highlights

Ad Valorem Taxes Collected History: (Percent collected average is 99%)

FY 2017-2018	FY 2018-2019	FY 2019-2020	FY 2020-2021
\$822,354	\$844,211	\$846,251	\$877,291

- **Ad Valorem Tax Revenues are budgeted at \$945,000.** This estimate is based on property tax revenues of \$870,000 and motor vehicle taxes of \$75,000.
- **Ad Valorem Tax Revenues represent 49% of total projected revenues.**

Sales & Use Tax Revenues History:

FY 2017-2018	FY 2018-2019	FY 2019-2020	FY 2020-2021
\$567,143	\$544,616	\$486,533	\$465,766

- **Sales and Use Tax Revenues are budgeted at \$400,000.** The five-year hold harmless agreement with Davie County that provided sales tax revenues via “per capita” reimbursement formula expired June 30, 2021. The current allocation formula Davie County uses to distribute sales tax allocation to town is the ad valorem distribution formula. The proposed sales tax budget will need to be evaluated more closely, due to reduced government stimulus monies to households and the potential for anticipated recession within the next two years.
- **Sales and Use Tax represents 21% of total projected revenues.**

Unrestricted Intergovernmental Revenue History:

FY 2017-2018	FY 2018-2019	FY 2019-2020	FY 2020-2021
\$228,940	\$241,109	\$221,371	\$209,732

- **Unrestricted Intergovernmental Revenues are budgeted at \$212,000.** This projection is consistent with the current year end estimate. These state allocated funds are distributed on a quarterly or annual basis.
- **Unrestricted Intergovernmental Revenues** consist of State allocated: Utilities Franchise Tax, Cable Franchise Tax, and Beer & Wine Tax. The General Assembly has looked at most the elimination of or the reduction of the Franchise Tax. This will need to be closely monitored in conjunction with membership in the North Carolina League of Municipalities.
- **Unrestricted Intergovernmental Revenue represents 11% of total projected revenues.**

General Fund Expenditure Highlights

- **Street Repairs and Maintenance:** \$520,000 has been designated for on-going street paving maintenance projects, street right-of-way maintenance and snow removal. This investment represents 58% of property tax revenues, which shows the Town Council’s commitment toward focused services.
- **Residential Trash & Recycle Pickup:** \$293,000 has been designated for trash and recycling pickup for Town residents. This represents a 3.5% increase from the current fiscal year.
- **Town Streetlights:** \$95,900 has been designated to pay for streetlights. This represents 11% of projected property tax revenues.
- **Community Officer:** \$96,000 has been designated for the fifth year of the Community Officer Program five-year agreement to reimburse Davie County Sheriff Department for services rendered. The current agreement ends in October, 2022.
- **Salaries and Employee Benefits:** \$284,140 has been designated for a total of three full-time employees at Town Hall. The Town Council concurred in budget discussions to appoint the accounting administrator as the Finance Director, with a revised pay grade and to provide a 10% cost of living increase to the Town Clerk. This expense represents 15% of the total budget. For many smaller municipalities, this area represents close to 50% of budgeted expenditures. The practice of contracting out town services has been fiscally helpful over the years.

The Gate Operations Fund:

The Town also administers a **Gate Operations Fund**, as approved by the North Carolina General Assembly. This fund receives revenues from “gate fees” assessed only to parcels of property that lie behind the gated portions of the Town. The Gate Operations Fund is proposed to balance at **\$674,600**. Due to current year capital project, such as the removal of Leyland Cypress Trees from the US 158 / Ivy Circle Fence line and inflationary pressures for paying contracted gate house operations, the proposed budget will need to increase the per parcel gate fee to \$551.34. The current per parcel gate fee is \$462.

Gate Operation Fund Revenue Highlights

- **Property Owner Gate Fees** are recommended at \$592,140. This represents an annual fee of \$551.34 per parcel.
- **BRCC Entrance Fee** is recommended at \$67,460. This represents approximately ten percent (10%) of the total estimated expenses, as agreed upon when the fence assets and operations were deeded over to the Town.

Gate Operation Fund Expenditure Highlights

- **Gate Attendant Services** are projected at \$465,000. This provides for three shifts at twenty-four hours a day, seven days a week. This represents 69% of budgeted expenditures.

The Utilities Fund:

The third fund the Town administers is the **Utilities Fund**. The Utilities Fund is proposed to balance at **\$530,850**. The fund operates and maintains a wastewater treatment plant and sewer collection lines. This system serves residents in the original section of the Bermuda Run Country Club area, as well as residential subdivisions along Bing Crosby Boulevard.

Utilities Fund Revenue Highlights

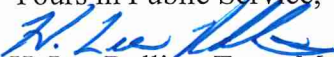
- **Sewer Service Revenues** are projected at \$530,850. This projection is based on mirroring the rates Davie County Public Utilities has set for East Davie sewer customers. Therefore, all Town residents pay the same rates for water and sewer.

Utilities Fund Expenditure Highlights

- **Renovation of the existing Juniper Pump Station and the decommissioning and removal of the wastewater treatment plant.** The Town Council in its wisdom has set aside funds over the past twelve years toward decommissioning the wastewater treatment plant and connecting sewer service to the new Eastern Davie Sewer District service. I am pleased to communicate enough cash reserves have been accumulated to fund this capital project, with no debt and no customer assessments. The Town has also applied for an Asset Inventory Assessment of the sewer line collection system to provide proactive management for on-going lines maintenance and the desire to eventually deed the system over to Davie County Public Utilities.

This is my thirteenth budget message to the Mayor and Town Council. It remains my honor and privilege to assist the Council in ongoing implementation of its plan for the Town’s future success.

Yours in Public Service,


H. Lee Rollins, Town Manager

Town of Bermuda Run, North Carolina

General Fund

REVENUES

PROPOSED 2022-2023 Budget	Quickbooks Account #	Account Title	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	2021-2022 Budget	2022-2023 Proposed Budget
Revenues:							
Current levies	1040012	Taxes	(772,024.26)	777,888.77	801,454.96	825,000.00	870,000.00
	1040027	Vehicle	(64,677.00)	65,977.98	73,737.46	65,000.00	75,000.00
Prior levies	1040015	Prior	(4,989.85)	993.28	1,974.71	1,000.00	1,000.00
Penalties and interest	1040011	Interest	(1,837.53)	1,195.73	57.50	800.00	800.00
	1040014	Interest	(682.11)	195.17	66.45	200.00	200.00
Local option sales tax	1040022	Sale/Use tax - hold harmless	(250,847.41)	185,538.95	118,137.74	0.00	0.00
	1040024	Sales tax	(293,768.57)	300,993.62	347,628.29	340,000.00	400,000.00
Utilities franchise tax	1040021	Franchise tax solid waste	(193,231.18) (1,877.33)	203,404.36	197,992.21	196,000.00	195,000.00
Cable franchise	1040050	Time Warner franchise	(7,334.11)	6,505.11	0.00	6,000.00	6,000.00
Beer and wine tax	1040019	Beer and wine tax	(11,666.22)	11,462.33	11,740.28	10,000.00	11,000.00
Powell Bill allocation	1040007	Powell Bill	(63,190.96)	61,896.21	61,968.66	61,000.00	61,000.00
ABC revenues	1040018	ABC revenue	(154,616.00)	166,000.00	193,790.00	165,000.00	165,000.00
Investment earnings	1040003	Interest income	(20,873.70)	33,392.11	8,560.45	20,000.00	8,000.00
Other income	1040005	Misc	(30,108.52)	35,105.08	25,203.37	10,000.00	10,000.00
	1040006	Zoning	(6,045.00)	195.00	50		
	1040101	Rent for elections	-	750.00			1000.00
	1040025	Fund Balance Appropriation	-				
Reimbursement for administrative charges	1040008	Overhead charges	(100,000.00)	100,000.00	100,000.00	100,000.00	130,000.00
			(1,977,769.75)	1,951,493.70	1,942,362.08	1,800,000.00	1,934,000.00

Town of Bermuda Run, North Carolina

General Fund

EXPENDITURES

PROPOSED 2022-2023 Budget

	Quickbooks Account #	Account Title	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	2021-2022 Budget	2022-2023 Proposed	2022-2023 Proposed
Expenditures:								
Governing Body	1050060		-					
	1050061	Council	9,000.00	8,850.00	8,850.00	9,000.00	9,000.00	11,400.00
	1050062	Mayor	2,400.00	2,000.00	2,400.00	2,400.00	2,400.00	
Salaries and Employee Benefits	1050034	Retirement	20,269.29	21,586.69	21,641.63	23,000.00	28,000.00	284,140.00
	add by auditor	401K	-					
	1050036	Payroll tax	14,428.84	14,866.07	14,100.09	16,000.00	20,140.00	
	1050037	FICA	-					
	1050038	Medicare	-					
	1050105	Payroll - staff	199,698.44	206,314.43	212,226.30	218,000.00	236,000.00	
Operating Expenses	1050001	General fund expense	-					
	1050005	Advertisement	2,191.07	2,772.61	2,235.77	2,000.00	2,000.00	129,357.00
	1050010	Dues and subs	5,422.20	5,832.75	5,868.87	6,000.00	6,000.00	
	1050013	Staff Insurance	43,776.45	55,377.29	46,883.42	60,000.00	60,000.00	
	1050014	Liability	7,407.53	7,704.94	8,129.05	9,000.00	9,000.00	
	1050015	Workers comp	623.47	600.00	600.00	800.00	800.00	
	1050017	Office supplies	2,411.05	2,768.39	2,114.72	2,500.00	2,500.00	
	1050018	Postage	1,665.82	2,190.85	1,584.77	5,000.00	5,000.00	
	1050021	Newsletters	8,695.00	4,593.05	20,150.00	10,000.00	18,000.00	
	1050022	Meeting expenses	154.06	3,901.13	348.14	3,000.00	3,000.00	
	1050026	Telephone	2,325.72	2,322.37	2,294.10	3,000.00	3,000.00	
	1050152	Maint and repairs	-					
	1050153	Computers	5,622.35	6,254.70	5,059.90	6,000.00	6,000.00	
	1050151	Lease	5,101.05	5,466.24	5,224.43	6,000.00	6,000.00	
	1050030	Payroll services	1,217.26	1,366.38	1,370.43	1,500.00	1,500.00	
	1050168	Payroll services	551.14	611.67	642.79	857.00	857.00	
	1050039	Travel	1,767.59	682.60	0.00	1,500.00	1,500.00	
	1050041	mileage	1,235.98	661.80	85.32	1,200.00	1,200.00	
	1050092	training	1,000.00	250.00	1,692.28	1,500.00	1,500.00	
	1050091	meetings	308.00	25.00	1,075.00	500.00	500.00	
	1050169	Payroll tax Council	872.07	872.07	1,090.98	1,000.00	1,000.00	
Professional Services	1050006	Audit	6,500.00	6,500.00	6,500.00	10,000.00	10,000.00	40,000.00
	1050128	Accounting software maint	8,674.63	9,108.37	9,609.32	10,000.00	10,000.00	
	1050029	Legal	11,840.00	16,236.00	23,300.00	20,000.00	20,000.00	
Tax collection fees	1050031	Davie Co tax collection	17,738.57	27,441.13	41,288.48	28,000.00	43,000.00	43,000.00
Town Hall expenses	1050124	Town Hall Utilities	5,341.74	6,101.64	4,658.92	5,500.00	5,500.00	27,500.00
	1050125	Town Hall Maint and repairs	1,278.98	2,727.04	1,037.50	5,000.00	5,000.00	
	1050126	condo dues	10,998.04	10,293.78	9,703.26	12,000.00	12,000.00	
	1050127	Town Hall cleaning	4,302.22	4,972.99	4,550.80	5,000.00	5,000.00	
Capital Outlay	1050003	Capital outlay	7,329.00					
Election costs	1050004	Election costs	-	4,171.00		4,500.00	4,500.00	4,500.00

PROPOSED 2022-2023 Budget			2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2022-2023
	Quickbooks Account #	Account Title	Actual	Actual	Actual	Budget	Proposed	Proposed
Planning and zoning	1050901	P & Z contracted	62,374.25	52,854.72	48,760.32	48,000.00	49,500.00	59,500.00
	1050047	Code Enforcement	-		125.00	10,000.00	10,000.00	
Ground / general maintenance	1050080	Kinderton Village Utility	3,646.00	3,617.54	4,051.31	4,000.00	4,000.00	79,000.00
	1050050	KV/BR Landscaping	45,747.78	42,465.58	42,548.12	45,000.00	45,000.00	
	1055501	Street ROW maint	30,657.25	17,850.48	29,116.42	30,000.00	30,000.00	
Leaf removal	1055505	annual leaf removal	24,750.00	35,325.00	43,335.00	50,000.00	50,000.00	50,000.00
Waste removal	1050082	Waste removal	190,895.04	200,924.34	207,396.48	279,543.00	293,000.00	293,000.00
Town projects	1050211	Website	3,428.20	3,363.79	771.76	5,000.00	5,000.00	114,772.00
	1050212	Fall spring clean-up	4,720.00	8,051.30	6,475.47	10,000.00	10,000.00	
	1050213	Other town projects	67,444.00	17,125.00	35,068.90	20,000.00	44,000.00	
		Economic Development			43,512.00	45,000.00	45,772.00	
		Ignite Davie Pledge					10,000.00	
Post office	1050051	Post office	1,068.78	706.94	5,378.87	2,000.00	2,000.00	2,000.00
Other	1050059	Community events	55,290.26	25,486.12	6,679.69	30,000.00	40,000.00	61,931.00
	1050053	Contract labor	12,041.92	11,489.30	15,594.27	15,000.00	15,000.00	
	1050054	Electricity	1,771.80	1,684.74	1,559.35	2,000.00	2,000.00	
	1050052	Cleaning	2,848.19	3,146.57	2,347.77	3,000.00	3,881.00	
	1050056	Repairs	2,262.90	1,258.83	0	800	1,050.00	
	1050055	Monitoring	-					
Safety - community police program	1050088	Community Police program	89,573.00	87,740.00	79,553.00	93,000.00	96,000.00	96,000.00
Engineering	1050067	Engineering	29,822.50	15,929.27	9,000.00	20,000.00	20,000.00	20,000.00
Repairs	1050068	Repairs	423,087.60	326,950.59	410,920.00	400,000.00	400,000.00	420,000.00
	1050069	Snow removal	14,950.00	0.00	0.00	15,000.00	15,000.00	
	1050175	Brine spray	5,600.00	0.00	0.00	5,000.00	5,000.00	
Other	1050087	Street signs	12,043.94	12,640.67	9,517.50	10,000.00	10,000.00	100,000.00
	1055502	Irrigation of town commons	13,876.71	11,164.52	10,885.22	15,000.00	15,000.00	
	1055504	Other ground maint	90,118.74	85,249.18	93,419.07	75,000.00	75,000.00	
Street lights	1050078	Highlands	362.22	277.53	311.61	400.00	400.00	97,900.00
	1050079	James Way	2,019.57	1,993.20	3,357.72	2,500.00	2,500.00	
	1050075	Consolidated street lights	71,099.41	78,300.60	92,672.40	75,000.00	95,000.00	
Other capital projects	1050066							
	1059100							
	1059200							
	1059220	sidewalks		205,903.05				
	1059230	Powell Bill Repairs&Maintenance		7,843.97				
	add by auditor	capital outlay streets	25,772.50					
	1050112	Blue Heron P/D	92,446.25	60,224.80	122,043.55			
			1,797,439.51	1,761,616.82	1,790,717.07	1,800,000.00	1,934,000.00	1,934,000.00

Town of Bermuda Run, North Carolina
Special Revenue Fund - Gated Security
PROPOSED 2022-2023 Budget

	Quickbooks Account #	Account Title	2018-2019 Actual Amount	2019-2020 Actual	2020-2021 Actual	2021-2022 Budget	2022-2023 Proposed
Operating revenues:							
Gate fees	2040005	RFID Sticker fees	(15,035.00)	11,775.00	20,105.00	15,000.00	15,000.00
	2040007	BRCC entrance	-	51,300	54,829.00	54,829.00	67,460.00
	2040008	Property owner fees	(505,046.91)	449,576.76	493,647.00	496,188.00	592,140.00
	2040011	Fund Balance Appropriation	-	15,567.58			\$551.34 gate fee
			<u>(520,081.91)</u>	<u>528,219.34</u>	<u>568,581.00</u>	<u>566,017.00</u>	<u>674,600.00</u>
Operating expenditures:							
Administrative	2050025	Overhead	50,000.00	50,000.00	50,000.00	50,000.00	65,000.00
Gate operations expense							
	2050002	RFID Stickers	12,412.99	12,534.98	12,534.98	12,500.00	12,500.00
	2050005	158 Gate repairs	330.12	776.00	13,864.80	1,000.00	1,000.00
	2050006	Cleaning	1,486.95	1,880.83	2,027.84	1,664.00	2,200.00
	2050007	Electricity	2,113.43	1,253.08	1,202.17	2,500.00	1,500.00
	2050008	Repairs	586.83	2,195.86	190.34	1,000.00	1,000.00
	2050009	Telephone	1,691.79	1,707.89	2,116.04	2,000.00	2,000.00
	2050011	801 Gate repairs	636.00	40.00	1,155.56	1000.00	1000.00
	2050012	Cleaning	1,486.94	1,880.83	2,027.82	1,664.00	2,200.00
	2050013	Electricity	1,499.37	1,364.87	1,657.28	2,000.00	1,800.00
	2050014	Repairs	839.25	2,591.04	516.00	1,000.00	1,000.00
	2050016	Telephone	1,673.21	1,680.98	1,801.09	2,000.00	2,000.00
	2050018	BR West Gate repairs	270.00	519.00	7,787.18	1000.00	1000.00
	2050019	Cleaning	1,486.94	1,850.83	2,027.78	1,664.00	2,200.00
	2050020	Electricity	2,464.60	2,432.43	1,946.30	2,800.00	2,200.00
	2050021	Repairs	821.95	4,415.85	273.00	1,000.00	1,000.00
	2050022	Telephone	1,836.73	1,813.67	1,876.92	2,000.00	2,000.00
	2050029	Ground maint	66,897.14	78,495.34	45,418.92	62,000.00	75,000.00
	2050032	Water/Sewer	365.70	373.86	1,165.31	500.00	1000.00
	2050027	Gate mgt system	8,511.25	10,705.17	9,285.00	12,000.00	12,000.00
	2050024	Guard services	353,511.03	349,356.83	391,869.67	387,000.00	465,000.00
	2050031	Contingency	3,642.07	350.00	8,295.00	17,725.00	20,000.00
			<u>514,564.29</u>	<u>528,219.34</u>	<u>559,039.00</u>	<u>566,017.00</u>	<u>674,600.00</u>

Town of Bermuda Run, North Carolina
Water and Sewer Fund
PROPOSED 2022-2023 Budget

	Quickbooks Account #	Account Title	2018-2019 Actual Amount	2019-2020 Actual	2020-2021 Actual	2021-2022 Budget	2022-2023 Proposed
Operating revenues:							
Sewer charges	3040003	Sewer service	(546,696.61)	527,122.00	525,341.00	530,000.00	530,000.00
Tap fees	3040010	sewer tap fees	(2,550.00)	850.00	850	850	850
			<u>(549,246.61)</u>	<u>527,972.00</u>	<u>526,191.00</u>	<u>530,850.00</u>	<u>530,850.00</u>
Operating expenditures:							
Licenses	3050003	Licenses	960.00	1,010.00	1,010.00	1,200.00	1,200.00
Charges from general fund	3050008	Admin charges OVERHEAD	50,000.00	50,000.00	50,000.00	50,000.00	65,000.00
Line repairs	3050022	Line repairs	19,123.00		30,000.00	30,000.00	30,000.00
Engineering	3050002	Engineering	-		0.00	60,000.00	60,000.00
Plant operations	3050001	Utility fund expense	-				
	3050012	Plant operations	20,336.37	20,000.04	20,000.04	25,000.00	25,000.00
	3050130	sampling	6,672.00	7,063.00	7,006.00	7,000.00	7,000.00
	3050010	Dumpster	2,497.35	2,743.10	2,901.19	3,000.00	3,000.00
	3050013	Sludge	16,652.00	17,150.00	20,200.00	20,000.00	20,000.00
	3051017	plant chemicals	2,174.09	2,895.94	2892.45	2500.00	2500.00
Maintenance	3050036	Maintenance	833.00	1,991.49		0	0
Repairs -plant	3050014	Repairs	13,523.60	7,954.56	31,121.28	10,000.00	10,000.00
	3050300	Emergency repairs	-				
Repairs - lines	3050017	Inspection	12,720.00	12,720.00	12,893.00	13,000.00	13,000.00
	3050018	Repairs	8,041.80	42,635.00	16,281.40	10,000.00	10,000.00
Utilities	3050006	Main station - Juniper Circle	18,663.67	22,894.90	19,142.88	20,000.00	20,000.00
	3050007	River Hill lift station	2,161.57	1,310.57	2,618.44	2,500.00	2,500.00
	3050032	Hollybrooke	577.16	490.77	519.59	3,000.00	3,000.00
	3050033	Bing Crosby	275.60				
	3050035	801 lift	22.10	278.00	308.56	400.00	400.00
	3050040	Ivy Circle	(1,287.46)	2,445.08	3,827.94	3,000.00	3,000.00
	3050042	Boxwood Circle station	2,417.20	3,239.88	2,449.65	3,000.00	3,000.00
	3050045	Utilities 801	514.16	490.77	519.59	600.00	600.00
	3050015	Water	365.70	420.95	3,450.77	500.0	500.0
Capital outlay	3050200	stormwater project	3,850.00		58,898.00	20,000.00	20,000.00
	3050300	wwtp project	-		0.00	229,550.00	214,550.00
Other	3050005	Fescue	-		0	0	0
	3050038	Weekly inspection	11,400.00	11,400.00	11,400.00	11,400.00	11,400.00
	3050021	Sewer billing	4,765.00	4,626.00	4,767.78	5,200.00	5,200.00
	3050103	Fees sewer debt collection	-				
			<u>197,257.91</u>	<u>213,760.05</u>	<u>302,208.56</u>	<u>530,850.00</u>	<u>530,850.00</u>