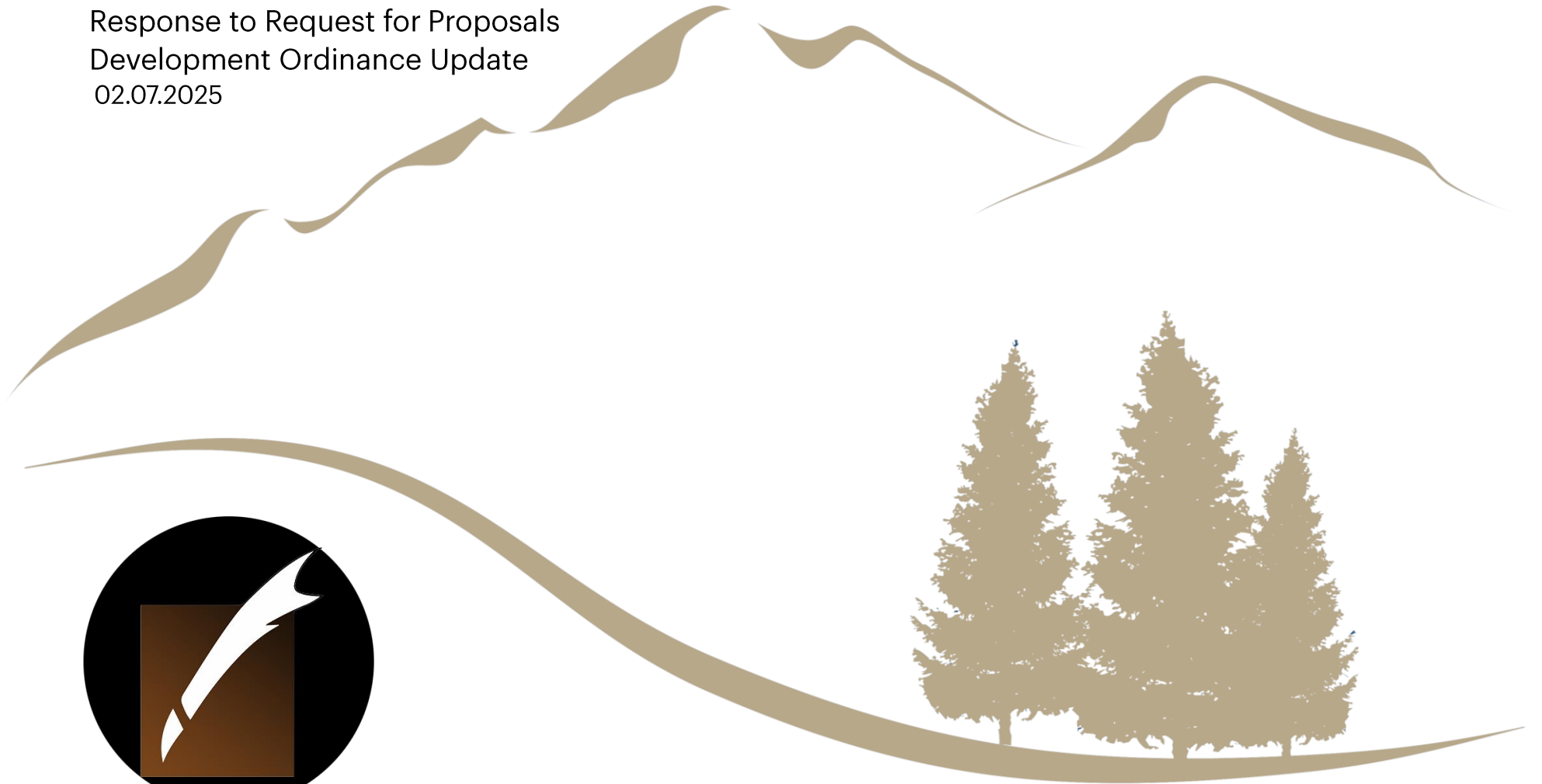


# Town of **Woodfin**

Response to Request for Proposals  
Development Ordinance Update  
02.07.2025



February 7, 2025

Ricky Hurley, Planning Director  
Town of Woodfin  
90 Elk Mountain Road  
Woodfin, NC 28804



(via email to: [rhurley@woodfin-nc.gov](mailto:rhurley@woodfin-nc.gov))

**RE: Planning Services for Development Ordinance Update Response to Request for Proposals**

Dear Mr. Hurley,

Thank you for the opportunity to submit a response to the Town's Request for Proposals for Planning Services. CodeWright Planners, LLC is a North Carolina planning consultancy specializing in drafting zoning, subdivision, and design regulations. We are passionate about planning, supporting our clients, and creating clear, graphically-driven, and effective development codes. Hallmarks of our work include predictable review procedures, a blend of mandatory and flexible standards, incentives for preferred forms of development, and heavy reliance on graphics and illustrations. Over the past 10 years, CodeWright has drafted land development regulations for more than 30 communities across the Carolinas.

We believe we are uniquely suited to assist the Town of Woodfin with this project because:

- We are **experts** in code drafting – it is our core practice, not a sideline or an add-on.
- We are well-versed in national **best practices** – and we incorporate these proven ideas into your regulations.
- We use multiple methods of **outreach** – engagement comes at the right times and with the appropriate level of detail.
- We employ numerous **illustrations and tables** – few firms can match our commitment to illustration and effective page layout.
- We prepare **legally defensible** regulations – we ensure your rules are consistent with federal, State, and local laws.
- We **test** our regulations before adoption – in order to find and solve potential problems before adoption.
- We are **committed to our clients** – we see our projects through adoption and beyond.

If selected, I will serve as the Project Manager and primary day-to-day contact. We have the capacity, commitment, and expertise to assist Woodfin with this project. On behalf of the CodeWright team, we would be honored for the opportunity to work with you.

Warmly,  


Chad Meadows, AICP Principal & Founder, CodeWright Planners



## TABLE OF CONTENTS

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Section 1 Executive Summary	<b>1</b>
Section 2 Statement of Qualifications	<b>4</b>
Section 3 Project Team and Project Management	<b>8</b>
Section 4 Approach	<b>13</b>
Section 5 Project Cost Estimates	<b>20</b>

This is a response to the Town of Woodfin’s request for proposals to assist with a comprehensive update and consolidation of the Town’s development-related ordinances. CodeWright Planners, of Durham, North Carolina, led by Founder and Principal Chad Meadows, AICP, submits this response on behalf of the CodeWright team, consisting of Karen Mallo, AICP, Andrew Ausel, CZO, Site Collaborative (testing), and Tidewater Associates (mapping). Together, members of this team have over 70 years of combined experience assisting local governments with planning, development code preparation, illustration, and mapping.

As described in the Project Summary portion of the response, the consulting team has carefully reviewed the Town’s adopted **Woodfin Together** and existing regulations and identifies the following five key areas of potential improvement:

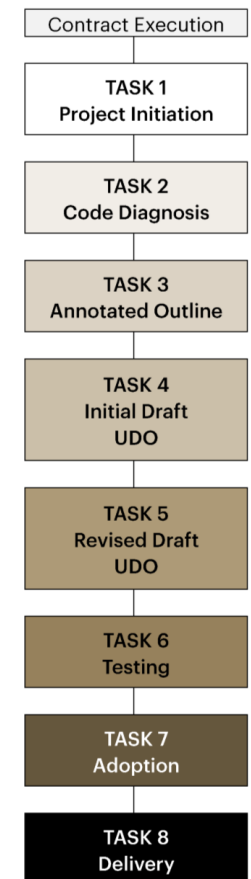
1. Making the UDO more User-Friendly (new structure, more graphics, clear terminology);
2. Promoting Infill and Multimodal Transportation (standards);
3. Modernizing the Districts and Uses (aligning districts with the FLUM, new use types);
4. Design Standards that promote community character, human scale, and open spaces; and
5. Protection of Vulnerable Populations (attainable housing, incentives, sustainability)

The proposed work program consists of eight basic tasks (see flow chart to the right). **The proposed work program anticipates a 16-month schedule starting in April of 2025, and has a base, not-to-exceed, expected cost of \$176,000.** The work program includes a consultant-managed project website, 5 consulting team visits to Woodfin (most in excess of 2 days each), staff and stakeholder interviews, 8 Steering Committee meetings, 5 public forums, 4 meetings with elected officials, and code maintenance training for City staff. CodeWright will also conduct monthly status meetings with Town staff throughout the project and provide 40 hours of pro bono continuing service assistance to the Town after adoption for further research, revision, or coordination assistance.

Chad Meadows of CodeWright will manage the project, serve as chief code drafter and illustrator with assistance from Karen Mallo, who will also coordinate public participation. Andrew Ausel will assist with drafting. Graham Smith of Site Collaborative will manage code testing. Kim Whaley of Tidewater Associates will prepare the draft zoning map.

There are four prior code project examples included in the response. Additional project examples, team details, and project contacts may be obtained at [www.codewrightplanners.com](http://www.codewrightplanners.com).

The CodeWright Team has no conflict of interest in regard to proposing for or completing the Development Ordinance Update.





## ABOUT CODEWRIGHT PLANNERS, LLC

Year Founded: 2014

Type of Business: LLC

Headquarters: 9 Blue Bottle Lane, Durham, North Carolina 27705

Webpage: [www.codewrightplanners.com](http://www.codewrightplanners.com)

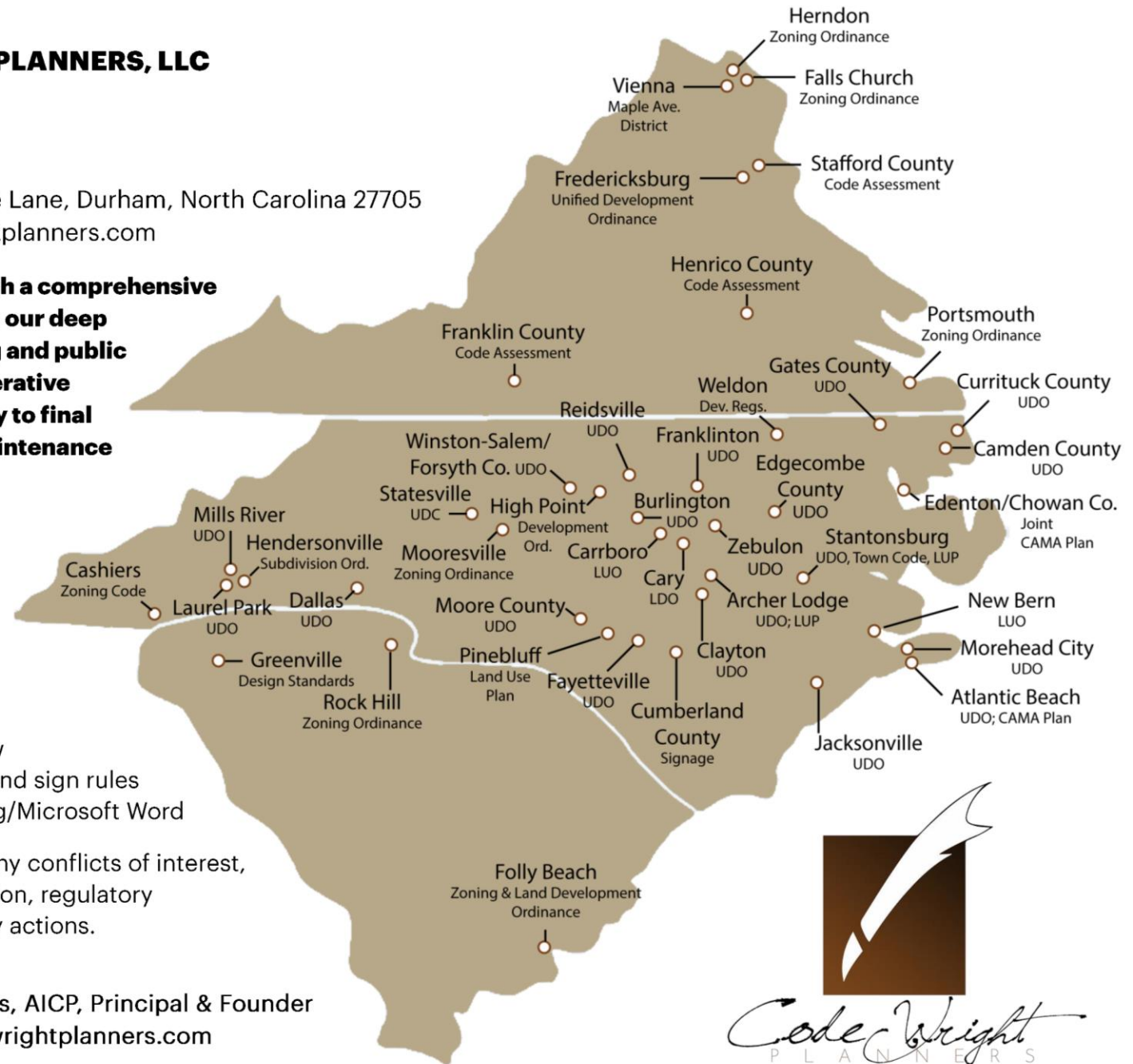
**We guide our clients through a comprehensive process developed through our deep experience – from branding and public engagement, through an iterative drafting process, all the way to final adoption and long-term maintenance**

We are experts in:

- Creating incentives for preferred development
- Balancing predictability and flexibility
- Reliance on measurable review criteria
- Procedural clarity
- Planning and land-use law
- Tree protection, design, and sign rules
- Graphics/Code formatting/Microsoft Word

CodeWright does not have any conflicts of interest, claims, investigations, litigation, regulatory proceedings, nor disciplinary actions.

**CONTACT:** Chad Meadows, AICP, Principal & Founder  
919.593.2868 [chad@codewrightplanners.com](mailto:chad@codewrightplanners.com)



**Celebrating 10 years of providing planning services to local governments throughout the Southeast**

## WHAT DOES CODEWRIGHT DO DIFFERENTLY?

### **We relentlessly pursue innovation.**

We are driven by the desire to continuously improve our work products and strategies.

### **We think about how a code will be provided before we start drafting.**

Each code is unique and we explore options for appearance, maintenance, and update before we start.

**We prepare detailed annotated outlines** of new codes to create more opportunities for discussion and exploration before drafting starts.

**We use incentives and flexibility** to create win/win outcomes for applicants and clients.

**We use a uniform procedural structure** to ensure predictability for applications.

**We track legislation** to find new ways to maintain legal sufficiency.

**We provide pro bono work and continuing services.** We stick around after adoption to learn what worked and to help our clients perfect their regulations.

## HOW DO WE APPROACH PUBLIC ENGAGEMENT?

### **Approach to engagement:**

Code projects are technical and require an approach targeted to the type of audience (developers, elected officials, the public). We are firm believers in multiple iterations of review and discussion of deliverables throughout the process. We understand how to “meet people where they are” in terms of their knowledge and understanding, and we put in extra effort to make sure everyone has a voice.

### **Audiences and methods of engagement:**

Differing audiences require different engagement methods. Examples include:

- **The public** - Public forums, webpages, zoning map workshops, ambassadors, site visits, short videos, and office hours.
- **Staff** – Document review and discussion, regular and ongoing status updates, and the Basecamp platform for internal project management.
- **Elected and appointed officials** – Assessments, presentations, and work sessions throughout the project.
- **Development community** – Testing, steering committee, and office hours.

### **Additional tools for engagement:**

We create unique branding for each project that is used for meeting announcements, documents, deliverables, and the website.

## WE ARE A SMALL FIRM BY DESIGN – HERE’S WHY:

**Value** - We are stewards of finite resources:

- Project budget goes to drafting, graphics, and outreach, not management or overhead.
- Project budget goes to paying for an expert, not training one.
- We focus on work product quality, not billable hours.
- Because we are small, we can focus on what it takes to get the work done instead of on contract amendments.

**Specialists** - Code drafting is our core practice:

- We focus on regulations instead of other disciplines.
- We understand how to navigate the legal landscape.
- We spend a lot of time thinking about how to write better codes.

**Personal attention** - More time with principals:

- Clients have direct access to seasoned professionals throughout the project.
- Regular access to experts means more time to discuss ideas and possibilities.



FIGURE 6.3.15: REZONING PROCEDURE

STEP	ACTION
1	<b>Pre-Application Conference</b> See Section 6.2.4: Pre-Application Conference
2	<b>Neighborhood Information Meeting</b> Required for applications seeking more intense zoning districts See Section 6.2.5: Neighborhood Information Meeting
3	<b>File Application</b> See Section 6.2.6: Application Filing and Acceptance
4	<b>Determination of Completeness</b> See Section 6.2.6F: Determination of Application Completeness
5	<b>Staff Review</b> See Section 6.2.8: Staff Review and Action
6	<b>Planning Board Review and Recommendation</b> See Section 6.2.10: Public Meetings and Hearings
7	<b>Public Hearing Scheduled</b>
8	<b>Public Notification</b> See Section 6.2.9: Public Notification
9	<b>Town Council Review and Decision</b> See Section 6.2.10: Public Meetings and Hearings
10	<b>Written Notification of Decision</b> See Section 6.2.12: Written Notice of Decision

## LAUREL PARK, NORTH CAROLINA

### Unified Development Ordinance

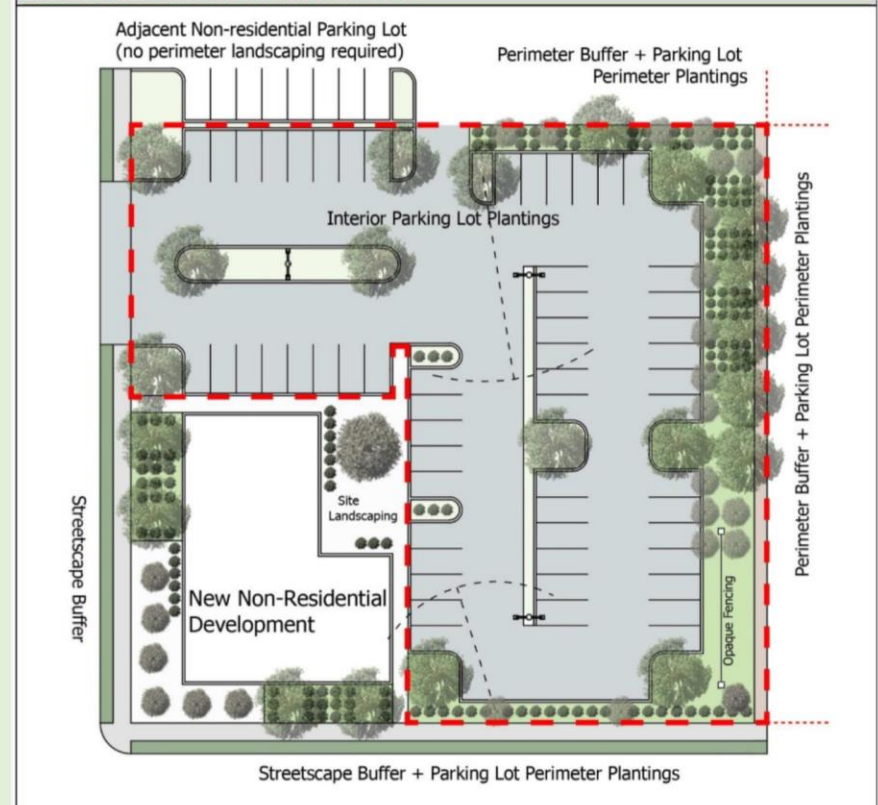
Laurel Park is a highly desirable mountain community at the eastern end of the Blue Ridge Mountains 26 miles south of Asheville. Laurel Park contracted with CodeWright Planners to prepare a new unified development ordinance. The project included:

- An innovative set of stormwater and tree protection provisions,
- Comprehensive design incentives for single-family residential development,
- A complete overhaul of the Town's subdivision provisions including new requirements for subdivision design and infrastructure development,
- New procedures to clarify and simplify the development application process, and
- Full compliance with a wide variety of State and federal laws (including 160D, the Reed decision, NC Court of Appeals rulings on administrative flexibility, and even the suite of applicable 2021 Session Law).

The UDO was adopted in March of 2021 and became effective in August. Since adoption, the Town has entered into a continuing services contract with CodeWright Planners, who have prepared a complete set of 19 new digital application forms for each procedure in the UDO as well as assistance with post-adoption codification of amendments in response to changing State legislation.



FIGURE 7.4.4: LANDSCAPE PLAN EXAMPLE





## JACKSON COUNTY, NORTH CAROLINA

### Village of Cashiers Zoning District

The village of Cashiers is an unincorporated crossroads on a mountain plateau in Jackson County, 40 miles southwest of Asheville. A community of 700 permanent residents, it has been a vacation home and summer resort destination for over a century. In addition to seasonal residents, Cashiers attracts thousands of summer visitors each year.

Growth pressures, traffic congestion, high land costs, and environmental protection issues led Jackson County to prepare a small area plan for Cashiers in 2019. This was followed by a community-sponsored ULI Advisory Services Panel Report which recommended managing growth and protecting the environment. In 2023, Jackson County hire CodeWright to assist with an overhaul of the Cashiers Commercial Area regulations.

The Recodify Cashiers project is a unique community character-based approach to zoning provisions. The project includes seven multi-day trips to Cashiers to discuss policy guidance, community goals, existing community character, and how modern development (like village-scale mixed-use, boutique lodging, and workforce housing) can best be accommodated.



#### RECODIFY CASHIERS Community Character Analysis 9-25-23



#### PLACES OF CONSISTENCY

##### 1. Bucks Coffee Cafe



- A Local Business
- B Gathering Area
- C Residential-Scale
- D Storefront Windows
- E Pitched Roof
- F Earth Tone Color
- G Clapboards
- H Vertical Stone Accent

##### 2. 107 South Corridor (Cornucopia, Fiddleheads, Vivace, & Highland Hiker)



- A Residential Scale
- B Pitched Roof
- C Earth Tone Colors
- D Wooden Siding
- E Gathering Spaces
- F Close to Street
- G 1-2 Story Height
- H Informal Parking
- I Storefront Windows
- J Sequential Additions

##### 3. Village Green



- A Institutional Use
- B Gathering Area
- C Residential Architecture
- D Sequential Additions
- E Pitched Roof
- F Earth Tone Colors
- G Shakes
- H Rafter Tails

#### PLACES OF INCONSISTENCY

##### 4. Spinx Stations (Highway 64 locations)



- A Canopy in Front
- B No Architectural Relationship between Canopy and Building
- C Scale of Canopy
- D Flat Roof
- E Limited Glazing (windows)
- F Service Areas not Screened



- A Canopy in Front
- B No Architectural Relationship between Canopy and Building
- C Scale of Canopy
- D Deep Front Setback
- E Corporate Signage

##### 5. Designer Cottages (display on Highway 64)



- A Modern Architecture
- B Monopitch Roof
- C Building Width
- D Scale
- E Foundation Obscured

#### Building Features Impacting/Comprising Community Character

The following pages are devoted to specific building features that comprise or impact community character (from the 10 most important features identified on Page 25 of this Analysis). Each feature has its own page(s), and some are divided into statements and images that identify consistent examples and inconsistent examples.

## KEY PROJECT FEATURES

- Environmentally-sensitive mountain resort destination
- Unincorporated village with its own zoning district
- Community character is codified in words and photos and used as review criteria
- Open space requirements for all use types





## BURLINGTON, NORTH CAROLINA

### Unified Development Ordinance

CodeWright Planners was retained to prepare a new unified development ordinance for this historic textile community of 50,000 in central North Carolina. The City adopted a new comprehensive plan that focuses on downtown revitalization, increased mobility options for residents, a wider array of housing choices, and infill development.

The first step in the process was conducting an ideas forum with the public to explore new concepts in coding. CodeWright also prepared a detailed code assessment to guide the project. The regulations were revised to implement the comprehensive plan with a focus on predictability, efficient review procedures, revitalization, and increased quality of development. Following the adoption of the UDO in July of 2019, CodeWright then prepared a detailed procedures manual with new digital application forms and submittal requirements.

CodeWright Planners is currently under retainer with the City to assist with ongoing document codification and text amendment preparation.

## DESIGN BURLINGTON UNIFIED DEVELOPMENT ORDINANCE



CHAPTER 5 DEVELOPMENT STANDARDS  
Section 5.6 Signage

TABLE 5.6.J: SIGN STANDARDS BY SIGN TYPE

1. Awning Sign

LEGEND:

- Max. Height: Roof or Top of Parapet Wall
- Max. Sign Face Area: 75% of Awning Area
- Max. Area of All Awning Signs: 5% of facade Facing Street

EXAMPLE:

Total Awning Area of Lower Awning = 90 sf  
Total Area of Facade Facing Street = 600 sf  
Max. Awning Sign Area on Lower Awning = 23% x 90 = 22.5 sf  
Max. Area of All Awning Signs: 5% x 600 = 30 sf

	RESIDENTIAL	MX & PD	CI & COI	NS	GB & CB	CBD & PDB	INDUSTRIAL & CI
a. Definition	No	Yes	No	Yes	Yes	Yes	Yes
b. Zoning Districts Where Permitted	No	Yes	No	Yes	Yes	Yes	Yes
c. Dimensional Standards	1 per every ten linear feet of building facade facing a street [1] Maximum Height: Under the roof or top of a parapet wall [2] Maximum Sign Face Area per Individual Awning Sign: 25 percent of the awning area upon which it is located, including the drip flap, if provided Maximum Sign Face Area of all Awning Signs per Lot: 5 percent of each facade facing a street [1]						
<b>NOTES:</b> [1] Signage on umbrellas or shade structures associated with an outdoor dining area are not counted as awning signs and are exempted from the awning sign number and face area standards. [2] Awning signs shall maintain a minimum height of at least eight feet above grade.							
d. Additional Standards	i. Signage may be located on the drip flap, subject to the maximum sign face area standards. ii. No awnings above the 3 <sup>rd</sup> building story may be internally illuminated. iii. Awning signs, when allowed within a street right-of-way, shall not project more than five feet into a right-of-way, nor closer than two feet from the curb line. iv. Signage may be subject to additional standards identified in Section 3.20.D, Gateway Corridor Overlay (GCO) District. v. An awning sign may only be established on a lot with a principal structure.						

### KEY PROJECT FEATURES

- Optional form-based code for downtown
- New sign standards consistent with the "Reed" decision
- Development standards tailored to different contexts
- Menu-based design standards
- Incentives for infill and redevelopment
- Digital application forms
- 4-year ongoing continuous services contract





## CLAYTON, NORTH CAROLINA

### Unified Development Ordinance

With pending completion of the final leg of Raleigh's Outer Loop (I-540), Clayton has become the fastest growing city in Johnston County (the fastest growing county in NC). Clayton has rapidly changed from a sleepy town of 7,000 in 2000 to a regional city of over 30,000 by 2023. In March 2022, Clayton hired CodeWright Planners to transform its development code into a modern, comprehensive unified development ordinance. The Town's goals for the Codify Clayton UDO project included:

- Implementation of its 2045 Comprehensive Growth Plan;
- More precise language and illustrations;
- A wider range of housing options; and
- Raising the bar for development quality.

The new UDO includes standards for 22 different zoning districts, 31 application procedures, 81 summary tables, and 287 illustrations. Public engagement on the project included a project web page, project brochure, 3 public forums, meetings with a development community focus group, 11 steering committee meetings over the course of the 21-month project. The new UDO was adopted in November 2023.

Clayton has engaged CodeWright in a continuing services contract to assist the town with perfecting its new UDO.



Learn more about the UDO and the Codify Clayton project at [www.codifyclayton.com](http://www.codifyclayton.com)



Clayton Planning Department  
Ben Howell, Director  
Clayton Town Hall  
111 East Second St.  
919.553.5002  
[planning@townofclaytonnc.org](mailto:planning@townofclaytonnc.org)



#### UDO features addressing Land Use & Housing goals

- Allow more mixed use development
- Add aesthetic and design standards for most uses
- Increase the range of housing types



#### UDO features addressing Downtown goals

- Make it easier and less expensive to develop in downtown
- Encourage redevelopment with infill incentives
- Foster live/work and upper story residential



#### UDO features addressing Transportation goals

- Provide more pedestrian infrastructure
- Add more bike lanes and facilities
- Establish street connectivity requirements
- Add new access management and driveway rules



#### UDO features addressing Economic Growth goals

- More predictable application procedures
- Foster mixed-use employment centers
- Add incentives for employment generating uses



#### UDO features addressing Parks & Natural Resources goals

- Increase open space requirements
- Add sustainable development incentives
- Increase tree protection rules
- Add a conservation subdivision option



#### UDO features addressing Public Services goals

- Enhance stormwater requirements
- Identify areas where public water & sewer will not be extended
- Increase densities in areas already served by infrastructure

### Chapter 6 Standards

#### Section 6.5 Infrastructure (Sections 6.5.1-6.5.12 Streets)

#### a. MINIMUM CONNECTIVITY INDEX SCORE REQUIRED

All development subject to this Ordinance shall achieve an internal street connectivity score in accordance with the following table:

TABLE 6.5.1 MINIMUM STREET CONNECTIVITY INDEX SCORE	
ZONING DISTRICT WHERE LOCATED [1]	MINIMUM REQUIRED INDEX SCORE
KUR, RLL, RLD	1.20
UD, HD, CZ1	1.25
RMD, RHD, CZR	1.30
NOM, PUB, CZC	1.40
DTM, MXD, CZM, CZD	1.50

#### NOTES:

[1] In cases where a single development is located within more than one zoning district, the connectivity index score shall be based on the zoning district with the highest minimum score requirements.

#### b. CONNECTIVITY INDEX SCORE CALCULATION

- The connectivity score for a development is calculated by dividing its links by its nodes.
- Figure 6.5.1 Street Connectivity Index Example provides an example of how to calculate the connectivity index. Nodes (dots) exist at street intersections and cul-de-sac heads within the development. Links (lines) are stretches of road that connect nodes. Street stub-outs are considered as links, but are not counted as nodes. One link beyond every node that exists in the development and provides access to the street system outside the development shall be included in the index calculation.
- In the diagram, there are 37 links (circles) and 22 nodes (dots); therefore, the connectivity index is 1.68 (37/22 = 1.68).

FIGURE 6.5.1 STREET CONNECTIVITY INDEX EXAMPLE



### KEY PROJECT FEATURES

- A novel approach to alphabetical chapter and section naming
- Unique three-tiered approach to conditional rezoning
- Innovative tree retention requirements
- Context-based open space standards
- Comprehensive infrastructure provisions
- Incentives for preferred development forms
- Project was completed on-time and under budget



## CODEWRIGHT CODE EXAMPLES

Laurel Park, NC UDO

<https://www.laurelpark.org/land-use>

Clayton, NC UDO

<https://www.townofclaytonnc.org/746/Unified-Development-Ordinance>

Burlington, NC UDO

<https://www.burlingtonnc.gov/2048/Development-Ordinance>

Recodify Cashiers Project Website

<https://www.recodifycashiers.com/>

CodeWright Project Descriptions

<https://www.codewrightplanners.com/projects>

The organizational chart below identifies the key team members. Chad Meadows serves as the Project Manager and Lead Drafter. He is supported by Karen Mallo, and Andrew Ausel. Graham Smith from Site Collaborative is responsible for code testing. Updates to the Zoning Map, if requested by the Town as part of the project, will be provided by Kimberly Whaley of Tidewater Associates. Resumes for each professional are included on the following pages.







**CHAD MEADOWS, AICP**  
Principal and Founder of CodeWright Planners

**Years of Experience: 32**

**Education:**

- Master of Urban and Regional Planning  
Portland State University, Portland, OR
- Bachelor of Arts, Geography  
University of North Carolina, Greensboro, NC

**Affiliations:**

- Chair, Board of Adjustment, Durham City/Co.
- Chair Emeritus, Legislative Committee, APA-NC
- Past Chair, Raleigh Appearance Commission

**Chad** has spent the last twenty years drafting and illustrating award-winning land use regulations, creating growth management plans, and providing planning support for a variety of municipalities across the United States. He takes a pragmatic and comprehensive approach to solving planning issues and has conducted complex projects as a public sector planner and as a private consultant. An expert in development regulations, Chad is passionate about producing the highest quality codes and plans for his clients and is driven by a desire to continuously improve, learn, and share his knowledge.

As a public sector planner, Chad worked in the Portland Bureau of Planning, served as Senior Comprehensive Planner in the Florida Keys, and oversaw the Land Development Ordinance Update in Cary, North Carolina. His breadth of experience includes working on growth management and adequate public facilities issues, long range planning, and entitlements.

Prior to founding CodeWright, he spent a decade drafting and illustrating codes for a national land use consulting firm, and co-authored *The Rules that Shape Urban Form*. Chad founded CodeWright Planners in 2014 to focus on providing code drafting services to towns, cities, and counties throughout the Southeast.

**Bold = CodeWright clients**

**SELECTED PROJECT EXPERIENCE**

Complete Development Codes

<b>Archer Lodge, NC</b>	Henderson, NV
<b>Atlantic Beach, NC</b>	Jacksonville, NC
<b>Burlington, NC</b>	<b>Laurel Park, NC</b>
<b>Camden County, NC</b>	<b>Leggett, NC</b>
<b>Carrboro, NC</b>	<b>Mills River, NC</b>
Cary, NC	<b>Morehead City, NC</b>
<b>Cashiers, NC</b>	Mooresville, NC
<b>Clayton, NC</b>	<b>Moore County, NC</b>
Currituck Co., NC	<b>New Bern, NC</b>
<b>Dallas, NC</b>	Portsmouth, VA
<b>Edgecombe Co., NC</b>	<b>Pulaski County, IN</b>
Falls Church, VA	<b>Red Oak, NC</b>
Fayetteville, NC	<b>Reidsville, NC</b>
Folly Beach, SC	Rock Hill, SC
Franklin, TN	<b>Stantonsburg, NC</b>
<b>Franklinton, NC</b>	<b>Statesville, NC</b>
Fredericksburg, VA	<b>Weldon, NC</b>
<b>Gates County, NC</b>	<b>Zebulon, NC</b>
<b>High Point, NC</b>	

Special Projects

<b>Atlantic Beach, NC – CAMA Plan</b>
<b>Conway, NC – Code Assessment</b>
<b>Cumberland County, NC – Sign Code</b>
<b>Edenton/Chowan Co., NC – Joint CAMA Plan</b>
Franklin County, VA – Code Assessment
Greenville, SC – Design Standards
<b>Hendersonville, NC – Subdivision Ordinance</b>
Henrico County, VA – Code Assessment
<b>Morehead City, NC – Targeted code revisions</b>
<b>Morrisville, NC – Targeted code revisions</b>
<b>Raleigh, NC – PDD Application Materials</b>
Stafford County, VA – Code Assessment
<b>Stantonsburg, NC – Town Code</b>
<b>Talbot County, MD – Working Waterfront</b>
Vienna, VA – Maple Avenue District
<b>Winston-Salem/Forsythe County, NC – UDO</b>
<b>Assessment &amp; Reformat</b>



**KAREN MALLO, AICP, PP**  
Code Drafter and Public Engagement Specialist

**Years of Experience: 25+**

**Education:**

- Master of City and Regional Planning, Clemson University, Clemson, SC
- Bachelor of Science, Environmental Planning & Design, Rutgers University, New Brunswick, NJ

**Affiliations:**

- Member, AICP; North Carolina APA
- Licensed Professional Planner, State of New Jersey

**Karen** has more than twenty-five years of experience in public, non-profit, and private sector planning in jurisdictions across the United States. Her expertise includes code writing, urban design, community engagement, and municipal plan review. She has significant experience preparing development ordinances, comprehensive plans, downtown plans, and small area studies.

Having managed numerous projects, Karen builds strong client relationships and is an effective problem-solver. Karen facilitates community engagement through public workshops, outreach, and education, including presentations to elected officials, advisory boards, stakeholders and the public. She also provides technical support such as zoning recommendations, text amendments, and plan review.

Karen holds professional planning licenses from the American Institute of Certified Planners and the State of New Jersey. She has been an active member of the North Carolina Chapter of the American Planning Association since 2015.

## SELECTED PROJECT EXPERIENCE

### Code Projects and Updates

**Carrboro, NC**  
**Dallas, NC**  
**Mills River, NC**  
Benson, NC\*  
Bessemer City, NC\*  
Bryson City, NC\*  
Canton, NC\*  
Cramerton, NC\*  
Elkin, NC\*  
Sylva, NC\*  
Surf City, NC\*  
Whiteville, NC\*

### Code Assessments

**Mills River, NC**  
Benson, NC\*  
Surf City, NC\*

**Bold = CodeWright clients**

### Code Amendments/Plan Review

Belville, NC\*  
Pembroke, NC\*  
Rolesville, NC\*

### Land Use and Comprehensive Planning

Canton, NC\*  
Hamlet, NC\*  
Indian Trail, NC\*  
Maggie Valley, NC\*

### Wake Forest, NC\*

Cemetery Preservation Ordinance  
Historic District Standards  
Landscape Ordinance  
Tree Preservation  
Downtown Parking

*\*Completed while employed with another firm. Wake Forest projects completed while employed in Public Sector.*



**ANDREW AUSEL, CZO**  
Drafting Assistant

**Years of Experience: 6**

**Education:**

- Master of Urban and Regional Planning Virginia Tech, Alexandria, VA
- Bachelor of Arts, Political Science Messiah College, Mechanicsburg, PA

**Andrew** has over six years of experience in planning, specifically in the areas of ordinance drafting, environmental planning, public engagement, and stakeholder facilitation.

His public sector work focused on drafting the environmental articles of the City of Charlotte's Unified Development Ordinance, including tree preservation, stormwater, floodplains, and soil erosion and sedimentation. In addition, Andrew managed rezoning mapping applications for over 1,800 parcels to Transit-Oriented Development (TOD) zoning districts. Andrew also managed the creation and maintenance of read.charlotteUDO.org which is a City-maintained website that hosts the City of Charlotte's Unified Development Ordinance.

As a planning and zoning consultant, Andrew has supported code drafting projects in over five municipalities. With extensive experience in leading and managing the presentation of several codes, Andrew's primary focus is on code preparation and leveraging innovative technology to host codes after adoption. In 2024, Andrew was selected as a speaker at the APA-NC Annual Conference to present on his work to build and maintain Charlotte's UDO website and the lessons learned.

## SELECTED PROJECT EXPERIENCE

### Code Projects

**Clayton, NC**  
Charlotte, NC  
**Dallas, NC**  
**Statesville, NC**  
**Morehead City, NC**

### Planning Projects

**Archer Lodge, NC**  
**Red Oak, NC**

**Bold=CodeWright clients**

### Special Projects\*

City of Charlotte, NC  
Tree Canopy Action Plan  
UDO Lead on Stormwater, Floodplains, Soil Erosion and Sedimentation, and Tree Protection  
Corridors of Opportunity Lead for Environmental and Sustainability Project Planning  
Public engagement for UDO and Rezoning

*\*Charlotte projects completed while employed in the public sector.*





**Graham H. Smith, PLA, ASLA, LEED AP, CLARB**  
**President + Landscape Architect**  
**SITE COLLABORATIVE**

**Education:**

- Bachelor of Landscape Architecture, Virginia Tech

**Affiliations:**

- Landscape Architect #1365 (NC)
- Council Of Landscape Registration Boards (#3930)

Graham has more than 29 years of professional experience working directly with institutions, municipalities, and design experts across the country on a multitude of projects.

As President and Founder of Site Collaborative in Raleigh, North Carolina, Graham is responsible for design, project management and professional oversight for public and private sector design and build projects throughout the region.

His career has been focused on the creation of spaces that intermingle aesthetics, constructability, ecological processes, and the unique human experience – specifically campuses, trails, public parks, open spaces, and suburban site retrofits.

## SELECTED PROJECT EXPERIENCE

- **Eno River State Park Visitor Center and Maintenance/Operations Center:**  
State of NC Div of Parks; Orange County, NC
- **Hillsborough EMS Station:**  
Orange County; Hillsborough, NC
- **Western Wake Campus Due Diligence and Rezoning:**  
Wake Technical Community College; Morrisville, NC
- **Capital Boulevard Corridor Study:**  
City of Raleigh Planning Department; Raleigh, NC
- **Riverwalk Trail Design Guidelines:**  
City of Danville Parks, Recreation, and Tourism Department; Danville, VA
- **Union Street Bridge Overlook Conceptual Study:**  
City of Danville Parks, Recreation, and Tourism Department, Danville, VA
- **Bragg Boulevard Corridor Revitalization Study:**  
City of Fayetteville Planning Department; Fayetteville, NC
- **Danville River District Green Space Plan:**  
City of Danville; Danville, VA
- **Danville Park Equity Plan:**  
City of Danville; Danville, VA
- **Danville Riverfront Park:**  
City of Danville Parks and Recreation Department; Danville, VA
- **Danville Dan River Whitewater Park Study:**  
City of Danville Parks and Recreation Department; Danville, VA
- **Martinsville Public Parks Improvement Plan:**  
City of Martinsville; Martinsville, VA
- **Williamsburg Parks & Recreation System Master Plan:**  
City of Williamsburg + Greenplay LLC; Williamsburg, VA
- **Tar River State Forest Vision Planning:**  
Tar River State Forest Foundation; Franklin County, NC



**KIMBERLY WHALEY**  
**Tidewater Associates**

**CADD Operator, Mapping Specialist**

**Years of Experience: 28**

**Education:**

- Associate in Architectural Drafting,  
Coastal Carolina Community College

Kimberly Whaley is an expert CADD operator and is the CADD Drafting Supervisor at Tidewater Associates. She is responsible for mapping, technical drawing, and managing CADD Department personnel.

Kim has over 28 years of experience in civil drafting, technical drawings, graphics production, and micro computer applications utilizing Advanced Computer Aided Drafting and Design software.

In addition to creating land use maps and zoning maps, Kim's graphic experience includes production of Street and Utility Construction Plans, Boundary and Topographic Survey Maps, and Engineering Plans for institutional, municipal, commercial, and residential developments.

## SELECTED PROJECT EXPERIENCE

### Land Use and Zoning Mapping Projects

**Archer Lodge, NC Plan Update**

Leggett, NC Land Use Plan

**Mills River, NC Zoning Map**

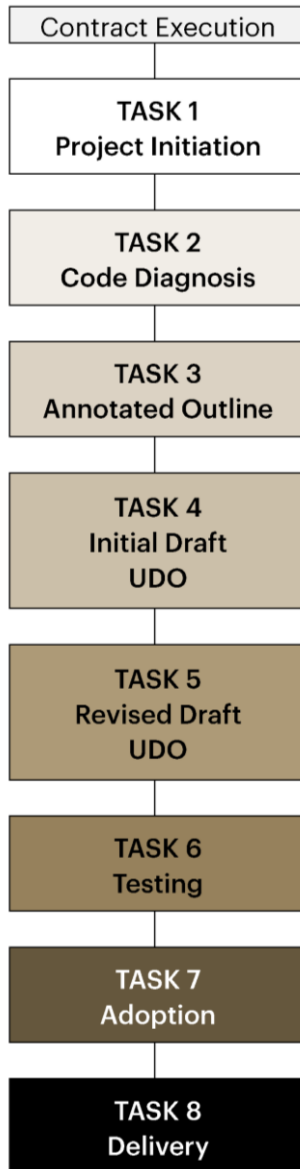
**Morehead City, NC Zoning Map**

**New Bern, NC Zoning Map**

**Stantonsburg, NC Land Use Plan**

**Bold=CodeWright clients**





Section 4 sets out our proposed scope of services for consolidating, updating, and writing Woodfin's UDO. It is based on our experience with similar UDO projects, but we view this as an initial draft that can be modified to meet the Town's needs. The work program consists of the eight basic tasks (see flow chart to the left) that result in one or more work products each.

The Tasks loosely corresponds to the Project Summary and Project Deliverables discussed on Pages 3 and 4 of the Town's RFP with some minor adjustments like integrating outreach efforts into each of the various tasks.

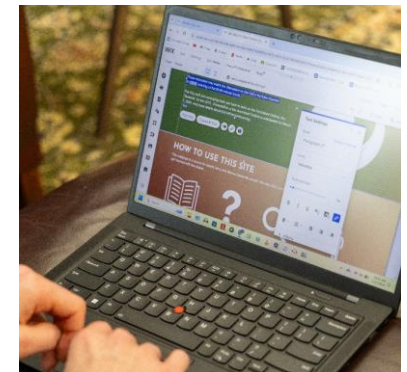
This scope anticipates that Town staff will conduct review of draft work products, provide comments, and participate in meetings. Town staff are also responsible for meeting coordination, scheduling, and

securing venues. We are happy to have Town staff take the lead on the preparation of certain sections, and can finalize those details during contract negotiation.

## TASK 1. PROJECT INITIATION

Project Initiation includes the consulting team's thorough review of all policy guidance (like Woodfin Together), as well as the existing development ordinances, text amendments, special legislation, and other regulatory information. This scope of services contemplates this review as part of the project approach as contemplated in the Town's RFP.

After reviewing these documents, the consulting team will travel to Woodfin for two days of meetings with the staff and community. Activities during this trip include project introductions to Town officials, discussion of project expectations, establishment of communication protocols, the initial meeting of the Steering Committee formed to oversee the project (which could also be the Planning Board, or a grouping of selected board members), finalizing the public engagement plan (including plan for stakeholders), project and deliverables schedule, creating project branding materials, a public forum to review land use and policy guidance, and stakeholder interviews. The task culminates with a presentation to the Town Council. Following completion of the trip, the team will prepare and launch the project webpage.



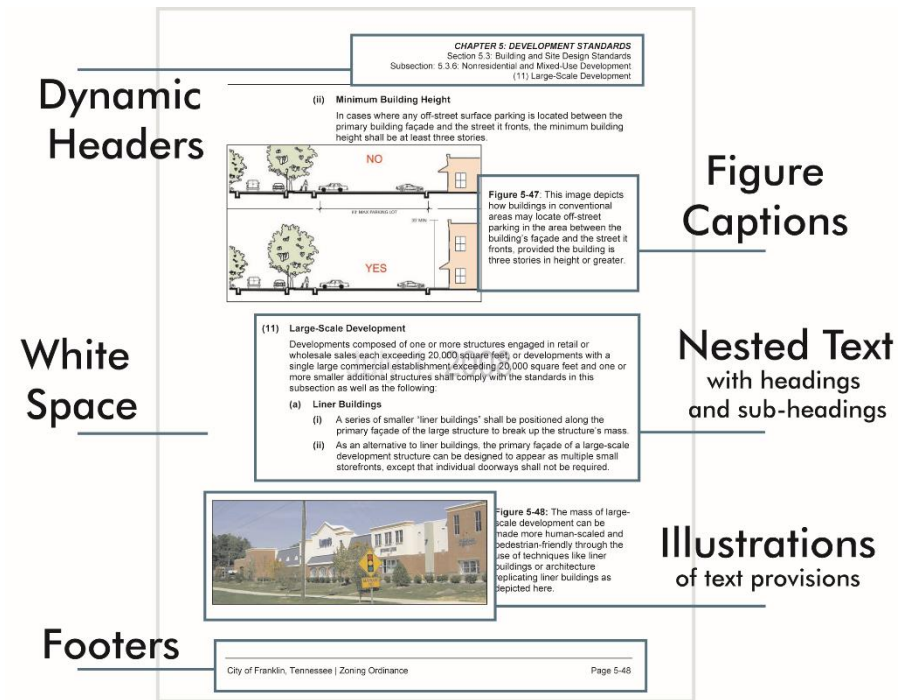
## TASK 2. CODE DIAGNOSIS

The Code Diagnosis is a “road map” for the new UDO. It is based on thorough reviews of adopted policy documents, existing regulations, and other feedback collected during Task 1. It includes detailed summary tables of all current land use policy guidance and development regulations supplemented with details on how policies could be implemented or how existing regulations might be revised.

The Code Diagnosis organizes its recommendations for UDO improvement into a series of key themes for improvement, such as how the document might be made more user-friendly or how greater procedural efficiency can be achieved. It will identify definitions or terms where diagrams are warranted or tables and charts that can be developed to more clearly outline a process. This review will also identify any changes needed to comply with State law, federal law, and relevant case law.

After posting the document on the project webpage, the task includes a two-day trip to Woodfin for consulting team members to discuss the report with the Steering Committee, the public, and the Town Council. The consulting team will also host its first set of office hours where anyone can schedule a meeting with the consulting team to pose questions or learn about the project.

The Town staff’s role in Task 2 is to review the initial version of the Code Diagnosis and provide comments to the consulting team who will then revise the document prior to publication.



The graphic above depicts the page layout from a modern development code. First and foremost, modern development codes are heavily reliant on graphics and illustrations to convey coding concepts. It is also important to provide captions that describe the images for readers. Document text is styled with varying typefaces, colors, and bolding schemes that help the reader better understand the relationships between the text elements. Each page includes a series of navigational aids like dynamic page headers and clear footers. Summary tables are also very important for providing significant amounts of information in easy-to-digest ways.

CHAPTER 2. APPLICATIONS

§201 Chapter Introduction  
201.1 Chapter Organization

§201 CHAPTER INTRODUCTION

This new section outlines how the Applications Chapter is organized into a summary table, a set of 34 different application types, and a set of basic or standardized review procedures the City will follow when processing applications. It also explains the uniform structure of each application section and provides a key to the symbols and colors in each application's procedural flow chart.

201.1 CHAPTER ORGANIZATION

Sets forth the organization of the chapter

§202 APPLICATION SUMMARY TABLE

202.1 DEVELOPMENT APPLICATIONS

The Application Summary Table identifies the type of development applications, review authorities for each application type, which addresses comments from the interviews held in February 2024, a cross-reference to the relevant Land Use Ordinance section, and whether a pre-application conference is required or optional. This table clarifies who hears appeals of certain decisions and indicates which decisions follow the legislative or evidentiary hearing process.

TABLE <>: APPLICATION SUMMARY TABLE

TYPE OF ACTION: C = COMMENT; R = RECOMMENDATION; D = DECISION; A = APPEAL; \* = NOT APPLICABLE  
PRE-APPLICATION CONFERENCE: M = MANDATORY; O = OPTIONAL; N/A = NOT APPLICABLE  
TYPE OF PUBLIC HEARING: ( ) = LEGISLATIVE; | | = EVIDENTIARY  
[#] = TABLE NOTES (INCLUDED AT BOTTOM OF TABLE)

APPLICATION TYPE	LUO SECTION	PRE-APP. CONFERENCE	REVIEW AUTHORITIES [1]										SUPERIOR COURT
			TECH. REVIEW COMMITTEE	CHIEF BUILDING INSPECTOR	STORMWATER SUPERINTENDENT	HPC ADMINISTRATOR	DIRECTOR OF PUBLIC WORKS	DIR. OF DEV. SERVICES	PLANNING BOARD	HISTORIC PRES. COMMISSION	BOARD OF ALDERMEN	BOARD OF ADJUSTMENT	
Administrative Adjustment	<>	O	*	D [2]	D [3]	*	D [4]	D [5]	*	*	*	A	*
Annexation <sup>13</sup>	<>	O	C	*	*	*	*	R	*	*	(D)	*	A
Appeal	<>	O	*	*	*	*	*	*	*	*	*	D	A
Building Permit	<>	O	*	D	*	C [6]	*	*	*	*	*	[7]	*
Certificate of Occupancy [8]	<>	O	*	D	*	*	*	*	*	*	*	[7]	*
Conditional Rezoning [9]	<>	M	R	*	*	*	*	*	R	*	(D)	*	A
Conservation Subdivision [10]	<>	M	C	*	*	*	*	D	*	*	*	A	*
Construction Drawings	<>	O	R	*	*	*	D	*	*	*	*	A	*
Conventional Rezoning	<>	O	*	*	*	*	*	C	R	*	(D)	*	A

<sup>13</sup> NOTE TO STAFF: Please advise if this application type will or will not be included in the table. See Steering Committee Meeting #2 meeting notes.

RE-NEW BERN

18 of 145

ANNOTATED OUTLINE

## TASK 3. ANNOTATED OUTLINE

The Annotated Outline is a “dress rehearsal” for the new UDO. It includes the full document structure, organization, page layout, numbering scheme, and a detailed description of each major section of the document.

The Annotated Outline includes footnotes clarifying how current sections are carried forward or revised as well as new sections added based on guidance in the Code Diagnosis (prepared in Task 2). The Annotated Outline will also include important summary tables such as the application procedures summary, the zoning district translation table, and the table of common principal uses (including a comparison to how the current UDO permits principal uses). It may also include a mockup of how the zoning district information will be organized, or how procedural text is configured. In the event SB382 is still State law, the Annotated Outline will set out the strategy for how to work around the potential for creating nonconformities on existing developed lots.

Following an initial staff review and revision, the Annotated Outline will be revised, placed on the project webpage, and the consulting team will then travel to Woodfin for two days of meetings with the Steering Committee, Planning Board, any Staff-identified focus groups, and will host the second set of office hours.

Town staff’s role in Task 3 is to review and comment on the draft Annotated Outline before it is posted. Town staff will also coordinate all of the proposed meetings and times for office hours.

## TASK 4. INITIAL DRAFT UDO

Task 4 includes the preparation and review of the initial draft of the new Unified Development Ordinance. The staff review version of the initial draft UDO will be prepared in three modules, or groups of related chapters, each forwarded to staff when complete.

Following discussion with Staff and document revision, the UDO in its entirety, will be forwarded to the Steering Committee for its review, then the consulting team will make three different trips to Woodfin for three rounds of half-day meetings to review the draft document. Decisions about how the new UDO material is presented can be discussed at a future point.

During each trip, the team will also conduct at least one outreach event or presentation in addition to the Steering Committee meeting. These events might include public forums, focus groups, or presentations to other Town boards and committees, at the Town's discretion.

Emphasis is placed on clarifying the key changes, improvements and anticipated outcomes from the new provisions. The task will culminate with a summary presentation to the Town Council. The project webpage will include opportunities for interested individuals to download the document, provide comments, and learn about opportunities for participation.

## TASK 5. REVISED DRAFT UDO

Task 5 includes the revisions to the initial draft version of the UDO based on the input received in Task 4. The consulting team will provide an overview of the comments with Town staff prior to preparing the revised draft versions.

Changes in the text will be tracked so that reviewers can see what portions of the document were revised.

Following time for review, the consulting team will organize a trip to Woodfin to present and discuss the revised UDO.

Ideally, the trip will coincide with a public Town event where the consulting team can establish a table or booth and be available to participants. The consulting team will also conduct a work session with the Steering Committee, and a public forum.

A work session with the Town Council will be scheduled to review in greater detail the recommended changes. This allows time for leadership to ask questions, suggest any changes, and build consensus.

Participants will have an opportunity to provide comments and feedback for further revisions.





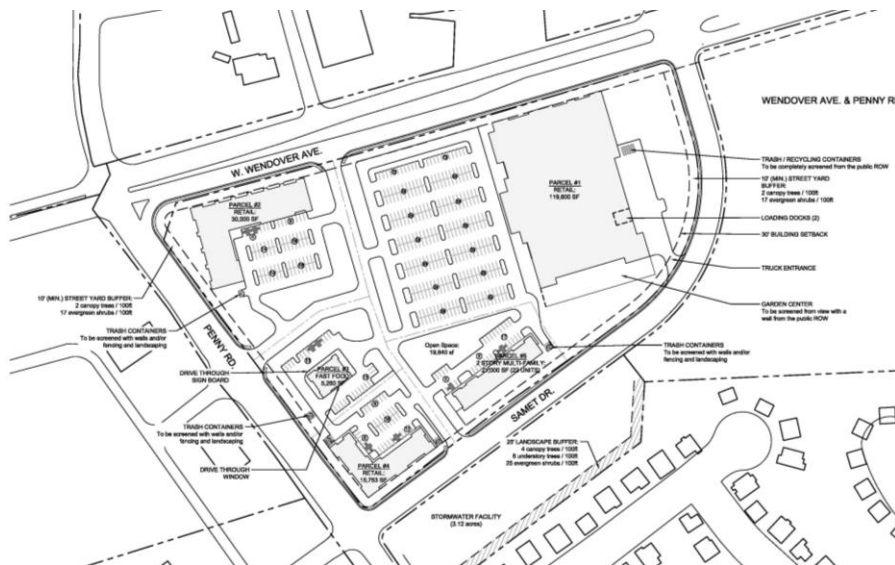
## TASK 6. TESTING

Following completion of the revised UDO draft in Task 5, the CodeWright team will commence with a testing exercise. Testing is performed to review the draft regulations for fatal flaws and unintended consequences that may result from the application of the standards. The testing task is also an excellent opportunity for members of the development community to engage with the draft UDO before it is adopted.

The testing process starts with Town staff identifying up to five recent development applications that have been approved. Typically, the identified sites include a residential subdivision, a stand-alone commercial site, a multi-family development, an industrial site (if possible), and a vacant site.

Town staff will provide digital copies of approved plans to the CodeWright team, who will prepare a new summary sheet or cover page plan showing how the site would be different under the new regulations. Once the initial sketches are prepared, they are reviewed with Town staff. Then, the consulting team conducts a two-hour focus group with the development community to discuss the hypothetical sites and explore potential revisions.

A follow-up meeting with the development community is conducted after further revisions to the hypothetical site plans are made based on initial discussions. The final deliverables of the task are a summary memorandum of findings based on the meetings with the development community and a short list of suggested revisions to the draft UDO language based on the outcome of the testing process.





## TASK 7. ADOPTION

As a part of Task 7, CodeWright will revise the draft UDO to address remaining comments, insert any remaining illustrations, prepare appendices, and ensure the document text is in adoption-ready form. The UDO materials will be delivered to the Town so the material may be advertised for the adoption process.

The adoption process involves two hearings – one with the Planning Board (conducted as a public meeting) and one with the Town Council. Consulting team members will make two one-day trips to Woodfin for these meetings. This scope of work anticipates the need for a third meeting or hearing, which has been included in the proposed cost.

## TASK 8. DELIVERY

Following adoption, CodeWright will deliver a digital version of the adopted UDO prepared in Microsoft Word 10, MS Office 365, or other current version. Three printed copies will be provided, as requested.

CodeWright will deliver a .pdf format version suitable for placement on the Town's webpage. Digital versions of all graphics and illustrations in the UDO are provided in .jpeg and native (Photoshop, Illustrator, Sketchup) formats.

This scope of services includes an on-site training session with Town staff regarding maintenance and revision of the ordinance text. We are happy to discuss options for continuing codification, text amendment, or testing services, as appropriate.



While not included in the scope of services, CodeWright provides 40 hours of post-adoption pro bono follow-up service to our clients. The manner and timing of the service is at the Town's discretion. Some communities use it for additional research and drafting. Others use it for training purposes. Some communities bank the time and then utilize it at a later date for assistance with subsequent amendments or codification. We are proud to provide this service as a demonstration of our commitment to long-term client relationships and our pursuit of innovation in code drafting services.

## PROJECT WEBPAGE

The CodeWright team develops a project webpage for use throughout the project as the primary source for project-related information and draft work products.

- Developed in Task 1
- Uses a unique project name/logo developed with the Town
- The page includes draft documents, FAQs, contact details, upcoming events, project status reports, etc.
- Site visitors may leave a comment or ask a question on the site
- The site is maintained by the consulting team throughout the project and then given to the Town



## STAKEHOLDER INTERVIEWS

Stakeholder interviews are an efficient way to identify issues of community concern with the code.



- The work program anticipates 8-10 one-on-one interviews in Task 1
- Stakeholders are persons involved with the development review process
- There are usually one or two stakeholders in each interview
- Interviews are conducted in-person or by video conference
- Work products include a summary report of stakeholder comments by topic
- A developers focus group may also be formed, at the Town's discretion

## STEERING COMMITTEE

Code projects often rely on technical experts to help review and revise draft work products.



- The Committee is formed in Task 1 and meets during Tasks 2 through 7
- The group can be comprised of Town board members or technical experts such as developers, architects, professional engineers, and lawyers (or a blend of the two)
- The Committee provides initial reactions to work products, but does not vote
- Work product reviews are conceptual, not line-by-line
- There are eight meetings anticipated

## **PUBLIC INVOLVEMENT**

Public outreach tactics must be engaging and attractive to ensure the community is present and able to provide feedback. The project team will employ several tactics to engage with the community on this project:

- Public forums
- Open house & drop-in meetings
- Project website
- Office hours



## **MEETINGS AND HEARINGS**

Planning Board and Town Council meetings are formal presentations and discussions held with Town officials throughout the project. These meetings serve as important check-ins and provide opportunities for feedback and decision-making. Each meeting will include a PowerPoint presentation or other relevant materials. The anticipated meetings are as follows:

- Task 1: Project Initiation
- Task 2: Code Diagnosis
- Task 3: Annotated Outline
- Task 4: Initial Draft UDO
- Task 5: Revised Draft UDO
- Task 7: Adoption (Planning Board & Town Council)

All meetings will be advertised by Town staff. The Planning Board meetings may need to be called as special meetings, or combined with Town Council meetings, depending on the schedule and topic.

## **OFFICE HOURS**

The CodeWright team anticipates multi-day trips to Woodfin during Tasks 3 through 7. During each trip, the team sets-aside at least one half-day to conduct up to four “office hours” meetings. These are meetings or presentations that are requested by Town residents or other organizations for the purpose of discussing the project or asking questions. Meetings are conducted by the consulting team with or without staff present while the consulting team is in Woodfin.

Town staff is responsible for scheduling office hours during the blocks of time allocated for these meetings, as well as for providing the necessary meeting space.





TASK	BUDGET
<b>Task 1 Project Initiation</b>	\$13,500
<b>Task 2 Code Diagnosis</b>	\$20,000
<b>Task 3 Annotated Outline</b>	\$16,000
<b>Task 4 Initial Draft UDO</b>	\$55,500
<b>Task 5 Revised Draft UDO</b>	\$25,000
<b>Task 6 Testing</b>	\$26,000
<b>Task 7 Adoption</b>	\$3,000
<b>Task 8 Delivery</b>	\$2,000
<b>Graphics</b>	\$10,000
<b>Webpage</b>	\$4,000
<b>Printing</b>	\$1,000
<b>TOTAL (not to exceed)</b>	<b>\$176,000</b>

This portion of the response outlines a proposed not-to-exceed project budget of **\$176,000** based on the proposed Scope of Work. We view this budget as a starting point for discussion and are willing to make modifications to better suit the Town's needs. Each task includes an individual task balance, and there are some aspects of the project that are billed as a flat fee. CodeWright does not charge for travel and tasks are only billed following completion. The 40 hours of post-adoption pro bono service from CodeWright is not billed. We encourage the Town to consider retaining a small contingency budget in case additional meetings become necessary. Hourly rates by team member are included in the table below.

Our hourly billing rates are as follows:

Chad Meadows, CodeWright	\$200
Karen Mallo, CodeWright	\$160
Andrew Ausel, CodeWright	\$100
Graham Smith, Site Collaborative	\$188



**THANK YOU FOR  
THE OPPORTUNITY TO SUBMIT A PROPOSAL!**