

- 9:00 a.m. **Equitable Engagement Framework**
Alexander Cahill, Affordable Housing and Equity Director
The Town of Davidson is committed to preserving its unique character and charm while also promoting diverse representation, inclusive and welcoming environments, transparency, and accountability. One way that we ensure that these values are being upheld is through community engagement efforts. In order to serve the community equitably, an equitable framework around engagement is being proposed to guide future endeavors. This framework is meant to codify best practices in the engagement field into the work of Town operations.
- Town staff are seeking input on the framework, leading into how the framework ties into the Strategic Plan Goal around defining restorative justice. This item is an opportunity to discuss and flesh out the restorative justice, equitable engagement, and equity department portfolio of work.
- 10:00 a.m. **Break**
- 10:15 a.m. **Financial Planning**
Piet Swart, Finance Director
Staff will present on the Town's Long Term Financial Plan with an emphasis on the current financial landscape, issuance of the 2017 G.O. Bond Orders, Fire Station #1 construction financing, and the FY26 Budget.
- 11:15 a.m. **Red Line Commuter Rail - Station Area Planning**
Jason Burdette, Planning Director
Kim Fleming, Economic Development Director
The Town of Davidson has planned for transit for decades as captured in multiple Comprehensive Plans and the Mobility Plan. After many years of delay, the City of Charlotte purchased Norfolk Southern's O-Line in Mecklenburg County and engaged a consultant to provide a Red Line Design Update. Additionally, the Board of Commissioners passed a resolution in 2024 in support of potential General Assembly legislation to authorize Mecklenburg County to include a one-cent sales tax on the November 2025 ballot as a referendum to support regional mobility efforts (roadways and transit). As the Red Line Design moves forward, the Town is evaluating current station location options and developing strategies for additional public engagement.
- 12:45 p.m. **Lunch**

1:15 p.m. **Strategic Plan Look Ahead to 2025**

Austin Nantz, Assistant Town Manager

In February of 2024 the Board of Commissioners and the Management Team participated in a strategic retreat to develop the board's two-year strategic plan. The planning process included completing a SWOT Plus (strengths, weaknesses, opportunities, threats) analysis, a review of the descriptions of the 2022-2023 Strategic Plan Goals and identifying new plan goals and strategies for the 2024-2025 plan.

The result of this work was a strategic plan with seven goals, updated goal descriptions, and priority strategies. The discussion will focus on action items for 2025.

2:15 p.m. **Break**

2:30 pm. **Open time for Board Discussion**

3:30 p.m. **Adjourn**



AGENDA MEMO

To: Davidson Board of Commissioners

From: Alexander Cahill, Affordable Housing & Equity Director

Date: January 8, 2025

Re: Equitable Engagement Framework

ITEM SUMMARY/OVERVIEW

The Town of Davidson is committed to preserving its unique character and charm while also promoting diverse representation, inclusive and welcoming environments, transparency, and accountability. One way that we ensure that these values are being upheld is through community engagement efforts. In order to serve the community equitably, an equitable framework around engagement is being proposed to guide future endeavors. This framework is meant to codify best practices in the engagement field into the work of Town operations.

Town staff are seeking input on the framework, leading into how the framework ties into the Strategic Plan Goal around defining restorative justice. This item is an opportunity to discuss and flesh out the restorative justice, equitable engagement, and equity department portfolio of work.

ACTION/PROPOSED MOTION

This item is for discussion only.

RELATED TOWN GOALS

Strategic Plan Alignment

Affordable Living, Equity & Inclusion - Work together to foster a culture of equity, belonging, inclusion, and advance the Town's Affordable Housing program. Provide, create, and support opportunities for all. Treat everyone with respect, dignity, and recognize every voice.

Core Values

Davidson's historic mix of people in all income levels and ages is fundamental to our community, so town government will encourage opportunities, services, and infrastructure that allow people of all means to live and work here.

Open communication is essential to an engaged citizenry, so town government will seek and provide accurate, timely information and promote public discussion of important issues.

NEXT STEPS



Framework for
Equitable,
Inclusive, Valued,
and Empowered
Engagement

Introduction

The Town of Davidson is committed to preserving its unique character and charm while also promoting diverse representation, inclusive and welcoming environments, transparency, and accountability. One way that we ensure that these values are being upheld is through community engagement efforts.

This Engagement Framework is designed to align with the values of the Town of Davidson while ensuring that our engagement approach is equitable, accessible, inclusive, and empowering. It aims to ensure that community voices, especially those from historically marginalized and underserved populations, are heard and, where possible, represented in the Town of Davidson's decision-making process, minimize adverse effects, and maximize benefits for low-income and priority groups.





Background

The Town of Davidson has a long-standing commitment to community engagement and recognizes a need for a standardized, intentional, and equitable approach. Davidson's position within the growing Charlotte-Mecklenburg Metropolitan region adds urgency to the need for community engagement. As development pressures and the demand for more housing, specifically affordable housing increase, the Town of Davidson will work to ensure that residents are not only informed, but also actively engaged. Inspired by other North Carolina jurisdictions, this framework aims to address the systemic barriers that prevent participation from all members of our community in Town's decision-making.

The Town of Davidson seeks to build on other North Carolina models, adapting it to the Town's unique values of community character, sustainability, and inclusion, as outlined in the Davidson Comprehensive Plan and Climate Action Plan. Through this framework, Davidson aims to shift the focus from simply gathering feedback to fostering long-term relationships with its population, ensuring that the Town's future reflects the needs and aspirations of its current and future residents.



What is Equitable Engagement?

Equitable, inclusive, valued, and empowered engagement is a process that goes beyond traditional community engagement by emphasizing the participation of those who are most affected by governmental decisions yet often least represented. Equitable engagement seeks to ensure that a representative cross-section of a community is actively involved in the decision-making processes.

The goal of cultivating equitable engagement is to center voices that have historically been marginalized or underserved because these are the community members who are most likely to experience the greatest impact from public policies and Town projects.

Collecting lived experience and community voice information from the entire community is a key value of this. This type of engagement requires identifying and addressing systemic barriers that limit access; such as language differences, financial constraints, or lack of access to information; and providing resources like stipends, transportation, childcare, and translation services to remove those barriers. Equitable engagement emphasizes transparency, power-sharing, and accountability, ensuring that contributions from all participants are respected and integrated into decision-making. This approach fosters trust, builds long-term relationships, and ensures that communities are not just informed, but empowered to take action to help shape the outcomes that impact their lives.

Guiding Principles

The following principles will shape Davidson's engagement strategy:

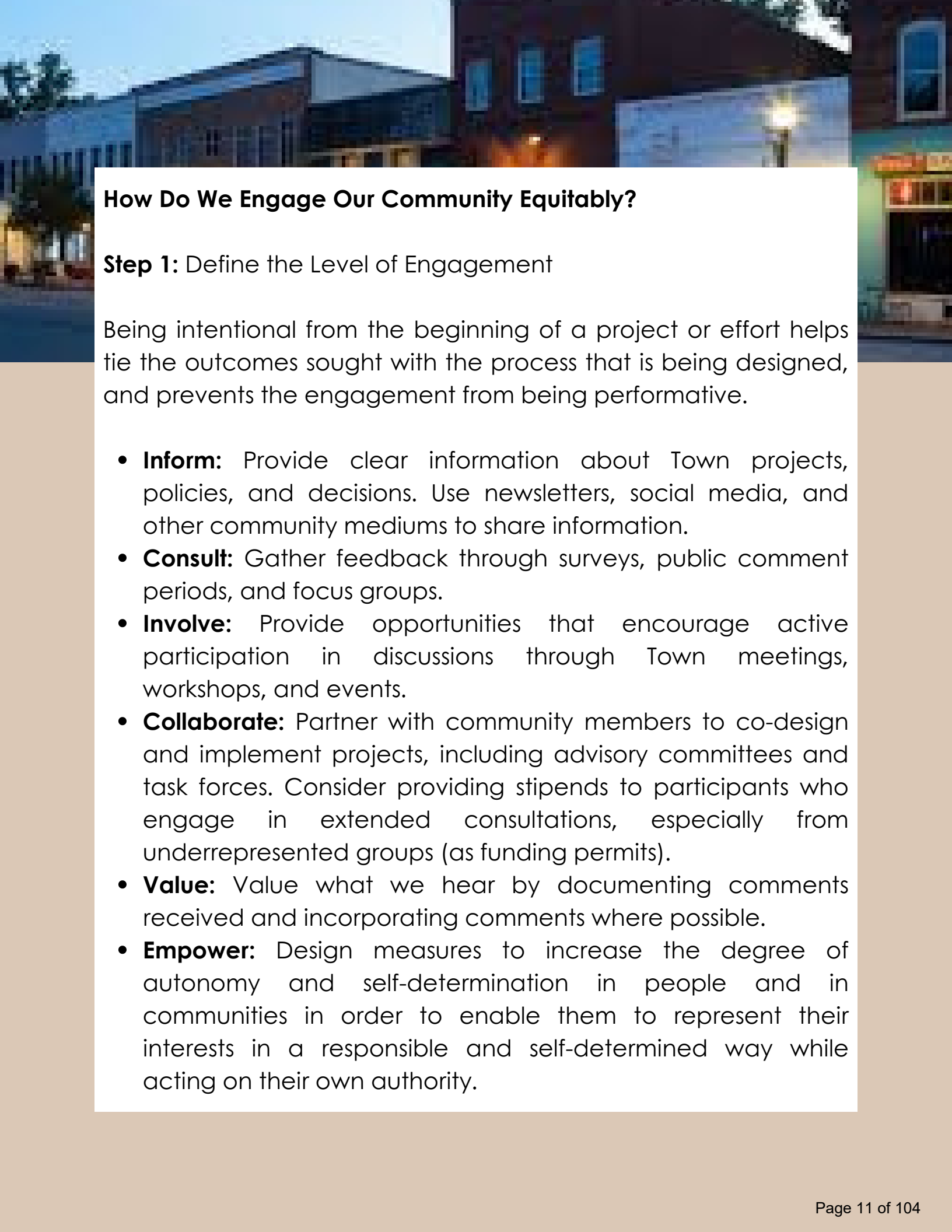
- **Inclusivity:** Ensure that outreach includes people from representative demographics, including race, ethnicity, age, gender, and socio-economic backgrounds, with a particular focus on those most impacted by decisions.
- **Accessibility:** Reduce barriers to participation by providing stipends, childcare, accessible meeting spaces, and translation services (as funding allows).
- **Transparency:** Communicate openly with residents about decision-making processes, including what is being decided and how their input will be used.
- **Collaboration:** Work with community partners, organizations, and local media to extend outreach and build trust.
- **Long-term Relationships:** Develop ongoing relationships with community members, prioritizing sustained engagement beyond one-time events.
- **Acknowledgment:** Acknowledge Davidson's past and present inequities. Acknowledge those working to advance the public good.



Goals

The primary goals of this framework are to:

1. **Ensure Representation:** Engage a cross-section of Davidson's population that reflects its diversity, focusing on key geographic and demographic factors.
2. **Apply an Equity Lens:** While engaging all, emphasize communities most affected by Town decisions and those who have been historically marginalized or excluded. For community efforts with a goal of equitable opportunity and outcomes to reach that goal, equity must be embedded all throughout. Equity must be part at the center of the “doing,” not seen as an add-on or distraction.
3. **Build Trust:** Establish long-term relationships with community members through transparent and responsive engagement.
4. **Compensate Participation:** Provide stipends (when funds are available) to reduce barriers to participation and compensate community members for their time and contributions.
5. **Sustain Participation:** Foster ongoing engagement by providing multiple opportunities for community input at various stages of projects.
6. **Avoid Extraction:** In the extraction model of engagement, communities are not involved in developing the scope, process, or the validity of the findings. This can lead to outsiders obtaining information rather than local people gaining and using it. It can also lead to burnout and engagement fatigue.
7. **Validate Qualitative and Quantitative Methods of Data Collection in Engagement:** Create and perpetuate a system where qualitative comments and stories from community engagement are used to complement and support quantitative data.



How Do We Engage Our Community Equitably?

Step 1: Define the Level of Engagement

Being intentional from the beginning of a project or effort helps tie the outcomes sought with the process that is being designed, and prevents the engagement from being performative.

- **Inform:** Provide clear information about Town projects, policies, and decisions. Use newsletters, social media, and other community mediums to share information.
- **Consult:** Gather feedback through surveys, public comment periods, and focus groups.
- **Involve:** Provide opportunities that encourage active participation in discussions through Town meetings, workshops, and events.
- **Collaborate:** Partner with community members to co-design and implement projects, including advisory committees and task forces. Consider providing stipends to participants who engage in extended consultations, especially from underrepresented groups (as funding permits).
- **Value:** Value what we hear by documenting comments received and incorporating comments where possible.
- **Empower:** Design measures to increase the degree of autonomy and self-determination in people and in communities in order to enable them to represent their interests in a responsible and self-determined way while acting on their own authority.

How Do We Engage Our Residents Equitably?

Step 2: Identify Who to Engage

- While engaging all, emphasize engagement with historically underrepresented groups and/or those most impacted by a decision, project, or program.
- Gather baseline demographic data to ensure representative participation, focusing on the Davidson community's socio-cultural and geographic diversity.
- Establish partnerships with local organizations, places of worship, schools, and other community centers to broaden outreach.
- Identify who would be most impacted by the project, process, or decision.



How Do We Engage Our Residents Equitably?

Step 3: Overcome Barriers to Participation

- **Provide Stipends:** Offer financial compensation for participation to community members who engage in consultations, serve on advisory boards, or contribute substantial time to engagement activities (as funding allows).
- **Childcare:** Offer childcare services during in-person engagement sessions to remove barriers for families or provide childcare reimbursement.
- **Accessibility:** Ensure meeting spaces are ADA-compliant. Offer virtual options to accommodate various schedules when possible.
- **Language Services:** Provide translated materials and interpretation services to accommodate non-English speakers. Ensure translators are compensated for their work. Provide information in both English and Spanish and monitor trends in other non-English language prevalence.
- **Transportation:** Provide transportation services, transit passes, or reimbursement to ensure residents can attend events, including through Charlotte-Area STS, Microtransit, or Rideshare reimbursement.
- **Timing:** Recognize non-traditional work and those who have to work multiple shifts to make ends meet. Schedule with these time barriers in mind.

How Do We Engage Our Residents Equitably?

Step 4: Measure Success

- Use quantitative and qualitative metrics to track the representation and level of participation. Ensure demographic and geographic data collection is part of every engagement effort.
- Assess whether engagement efforts successfully reached underrepresented groups and adjust strategies accordingly. Success should not only be based on numbers but also on the quality of engagement.
- Monitor and track where and how inputs/feedback from community was or wasn't used in decision-making or in the final product.

Step 5: Build Long-Term Relationships

- Foster ongoing relationships by keeping the community informed about the impact of their comments.
- Maintain open communication channels for future engagement opportunities, ensuring continuous participation from diverse groups.

Step 6: Circle Back & Close the Loop

- The most powerful step in equitable engagement is closing the loop and circling back. Sharing back with the community and asking “did we hear you correctly” is powerful in two ways. First, it shows that we are actively listening and not holding sessions just to hold them. More importantly it allows us to hear where we are wrong. We all come with a lens/bias/experience that shapes how we hear and receive things. Going back to community and asking if we heard them correctly allows us to be wrong, and then to get it right before deciding to use or not use feedback collected.

Stipends and Incentives for Participation

In an effort to encourage participation and remove barriers for community members, particularly those from low-income or historically excluded groups, the Town of Davidson will (when funding is available):

- Provide stipends to residents who dedicate time to advisory boards, task forces, or extensive engagement activities
- Compensate community members who assist with outreach efforts for and with the Town
- Compensate community member who co-lead or co-design engagement and/or outreach efforts for and with the Town

Town staff should refer to the Stipend Policy, Policy XX-XXX, when determining if a stipend should be provided.



 *The Town of*
Davidson

Did you know...

- There are 8 advisory boards and commissions you can apply to.
- Most advisory boards and commissions meet once a month.
- Each advisory board or commission has it's own webpage on the Town of Davidson website to learn more about each one in depth.

Affordable Housing & Equity Board (AHEB)

Design Review Board (DRB)

Historic Preservation Commission (HPC)

Livability Board

Planning Board

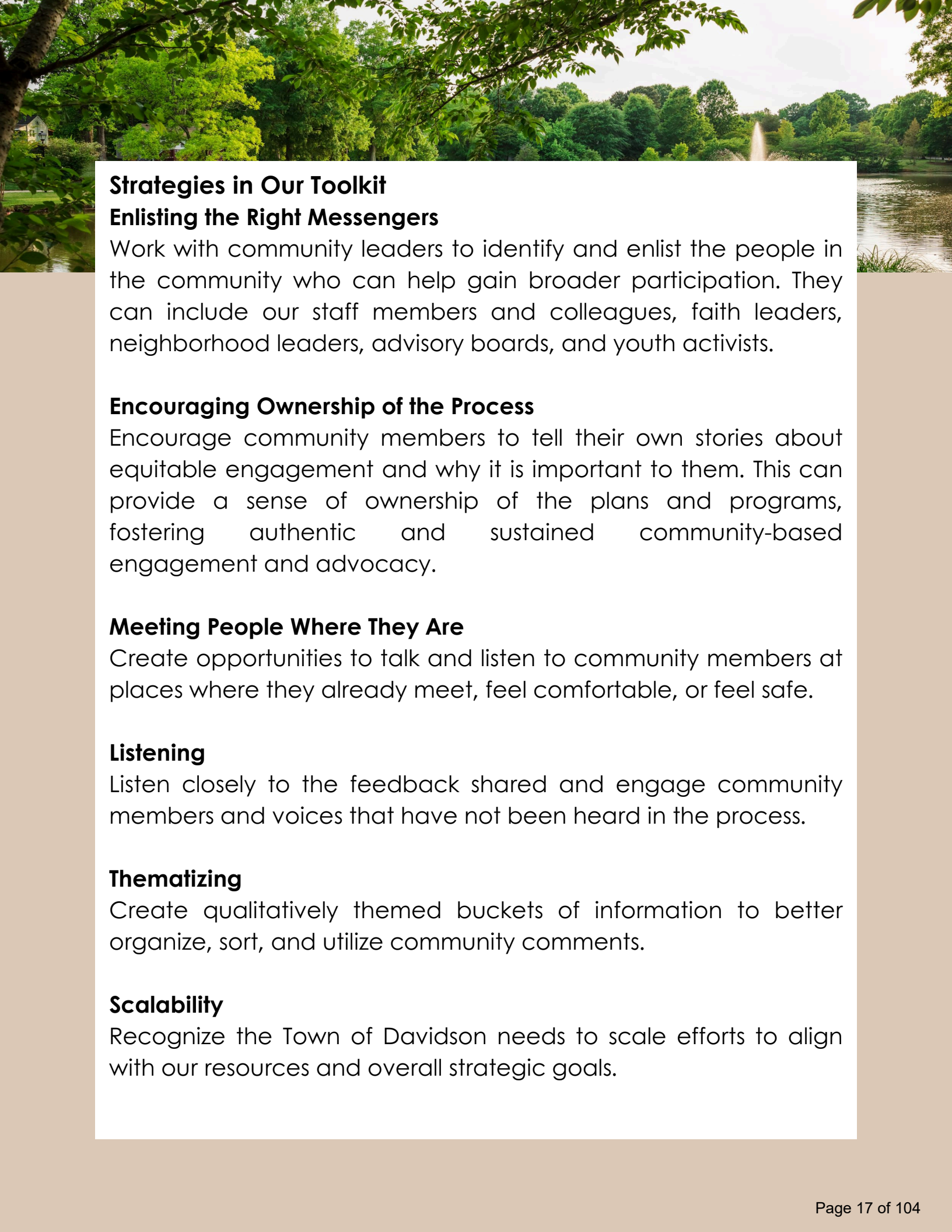
Public Art Commissions (DPAC)

Sustainability Board

Board of Adjustment

Implementation and Accountability

- **Community Engagement Team:** Establish a dedicated team responsible for planning and executing engagement efforts. The team will include representation from representative community groups and Town staff.
- **Accountability Mechanisms:** Regularly review the demographic and geographic data collected during engagement efforts to ensure goals of representation are being met.
- **Decision Rationale:** When outcomes differ from popular opinion, the majority, or the loudest voices – this will be mitigated through gaining buy-in on trade-offs early in the process and setting a clear scope or what is being collected.
- **Flexibility:** The engagement process will remain flexible to adapt to changing community needs and to continuously improve based on participant and non-participant feedback.
- **Transparency:** The comments collected will be posted on the Town's website or designated engagement platform and made available within 2 weeks of an engagement event or session, in their raw form. Thematized data will be provided when possible.
- **Attribution:** When commentary or feedback is used, it will be attributed to the source (the event it was collected at). Comments that are not used to inform decisions will be clearly denoted as such.



Strategies in Our Toolkit

Enlisting the Right Messengers

Work with community leaders to identify and enlist the people in the community who can help gain broader participation. They can include our staff members and colleagues, faith leaders, neighborhood leaders, advisory boards, and youth activists.

Encouraging Ownership of the Process

Encourage community members to tell their own stories about equitable engagement and why it is important to them. This can provide a sense of ownership of the plans and programs, fostering authentic and sustained community-based engagement and advocacy.

Meeting People Where They Are

Create opportunities to talk and listen to community members at places where they already meet, feel comfortable, or feel safe.

Listening

Listen closely to the feedback shared and engage community members and voices that have not been heard in the process.

Thematizing

Create qualitatively themed buckets of information to better organize, sort, and utilize community comments.

Scalability

Recognize the Town of Davidson needs to scale efforts to align with our resources and overall strategic goals.

Strategies in Our Toolkit

Monitoring

Monitor participation throughout the process and refer back to this guide to refine your methods of keeping the community involved as needed.

Demonstrate

Demonstrate to the community how their comments are helping to inform the process.

Metrics

Use community-informed metrics or equity indicators to assess how effective and equitable the engagement process is and how it can be improved for future events. Check in on how folks felt the engagement went and adapt accordingly.

Panning

In social justice discourse, "panning" refers to the practice of actively and intentionally observing and noticing patterns of behavior, comments, feelings, and power dynamics within a situation, often using the acronym "PAN" which stands for "Pay Attention Now," similar to how a camera pans across a scene to capture the whole picture; it encourages looking at a situation without assumptions or judgments to better understand underlying social justice issues.



What this framework is not?

This framework cannot plan for every event that may arise in engagement efforts. While it is a robust and comprehensive framework, it is meant to work to support other Town initiatives and plans. This framework does not apply to public comments made at public hearings or in front of Boards or Commissions (those comments are regulated by statutes and bylaws).

How to use this framework?

This framework is guidance that should be used when planning engagement processes. Any project that would benefit from an engagement effort should use this guide. Remind ourselves that engagement is an ongoing process. For those of us who like to close something out and move on, this is a paradigm shift and will require a shift in our work.



CONTÁCTENOS

Apartado Postal 579
Calle Sur 251
Davidson, Carolina del Norte 28036

Teléfono: 704-892-7591
Teléfono: 704-892-3971

Envíe un correo electrónico a los comisionados
Más información de contacto

ENLACES RÁPIDOS

Oportunidades de Carrera
Vías verdes
Proyectos de la ciudad
Tránsito
Aparcamiento

ENLACES DEL SITIO

Hogar
Mapa del sitio
Contáctenos
Accesibilidad
Avisos de derechos de autor
política de privacidad



BOARD OF COMMISSIONERS 2025 STRATEGIC PLAN MID-YEAR RETREAT

EQUITY & EQUITABLE ENGAGEMENT TERMINOLOGY PACKET

The following is a list of terms and definitions that you may hear in this presentation and ensuing discussion. Please feel free to reach out to Alexander at any time to discuss these or to learn more.

Anti-Racism: The *process* of taking stock of and eradicating policies that are racist, or that have racist outcomes.

Community Engagement: When community input helps shape outcomes. A collaborative *process* where people, organizations, and governments work together to address issues that affect their community.

Diversity: In its most basic form, diversity is the number of individuals in a group needed to ensure a demographic feels safe, secure, and empowered to fully participate. Research generally shows that the “magical third” is the correct number to ensure full participation by a demographic. For example, a Board with 9 members should have at least 3 individuals who identify as female for the “diversity” to be meaningful. The same “magical third” applies to any demographic group.

Environmental Justice: The idea that all people should be treated fairly and have a meaningful role in the development, implementation, and enforcement of environmental laws, regulations, and policies. It's about ensuring that everyone has equal access to the decision-making process and the same level of protection from environmental and health hazards.

Equitable Engagement: When community input helps shape outcomes. Equitable engagement seeks to reverse historical trends by leveraging a more equitable, efficient, and effective community outreach and engagement *process* that removes barriers for marginalized and/or underrepresented residents, business owners, and leaders to understand, value, and take part in the planning process.

Equality: Each individual or group of people has the same resources or opportunities.

Equity: The *process* of eliminating disparities and improving outcomes for everyone. It is the intentional and continual practice of changing policies, practices, systems, and structures by emphasizing measurable change in the lives of people of color, indigenous people, women (cis & trans women), renters, people of low-wealth, disabled people, the LGBTQIA+ community, those with limited English proficiency, veterans, immigrants, religious and non-religious minorities, and other historically marginalized and disinvested in groups.

Equity Indicator: Equity Indicators specifically compare outcomes for two or more groups and measure the disparity. For example, an equity indicator might compare unemployment rates for people with and without disabilities.

Inclusion: relates to the quality of the human experience. Having a diverse workplace means differences exist, and inclusion takes it forward to ask how everyone, from team members to end-users, can feel valued.

Intersectionality: The interconnected nature of social categorizations such as race, class, and gender, regarded as creating overlapping and interdependent systems of discrimination or disadvantage.

Latin/Latina/Latino/Latinx/Latine/Hispanic: Hispanic refers more to language, while Latino/Latina refers more to culture. LATINX is a gender-neutral term to refer to a Latino/Latina person. The “x” replaces the male and female endings “o” and “a” that are part of Spanish grammar conventions (however “x” is not used in this way in the Spanish language). Only 4% of Hispanics/Latinos in the U.S. use the term Latinx. Latine is a gender-neutral term used to describe people of Latin American descent. It's an alternative to terms like Latino, Latina, or Latinx, and is becoming more popular in museums, universities, and among researchers and media.

Language Access: Language access is the ability to obtain information and services in a language that a person understands. It's important for ensuring that people with Limited English Proficiency (LEP) or who speak other languages can: communicate effectively, receive important information, participate in processes that impact their lives, and have their civil rights and liberties protected. Language access can be achieved through: interpreters, translated materials, and culturally competent services.

Language Justice: Language justice is the idea that everyone should have the right to communicate in their preferred language, and to be understood by others in that language. The American Bar Association defines language justice as the right to communicate in a language that a person feels most articulate and powerful in. The goal of language justice is to create equal power dynamics so that everyone's voice is heard. Language justice is essential to human rights. Everyone has a right to dignity, respect, and equitable treatment regardless of whether they speak, read, write, or understand English.

Lived experience: Lived experience is the knowledge and understanding that comes from personally experiencing something, including the emotions, perceptions, and preferences that shape a person's

inner world. It can also refer to how people respond to those experiences. The term originated in qualitative research methods, where researchers engage with people's accounts of their experiences.

Marginalization: The treatment of a person, group, or concept as insignificant or peripheral; a complex *process* of relegating specific groups of people to the lower or outer edge of society, or “de-centering” them. It effectively pushes these groups of people to the margin of society economically, politically, culturally and socially following the policy of exclusion.

Participatory Budgeting (PB): A democratic *process* in which community members decide how to spend part of a public budget. It gives people real power over real money. PB started in Porto Alegre, Brazil, in 1989, as an anti-poverty measure that helped reduce child mortality by nearly 20%. Since then PB has spread to over 7,000 cities around the world, and has been used to decide budgets from states, counties, cities, housing authorities, schools, and other institutions.

Panning: In social justice discourse, "panning" refers to the practice of actively and intentionally observing and noticing patterns of behavior, comments, feelings, and power dynamics within a situation, often using the acronym "PAN" which stands for "Pay Attention Now," similar to how a camera pans across a scene to capture the whole picture; it encourages looking at a situation without assumptions or judgments to better understand underlying social justice issues.

Race: A social construct used to divide people into groups on the basis of physical characteristics.

Racism: When a person or group is treated worse, excluded, disadvantaged, harassed, bullied, humiliated or degraded because of their race or ethnicity.

Racial Equity: The *process* of eliminating racial disproportionalities so that race can no longer be used to predict success and therefore increase the success of all communities.

Redlining: Redlining is a discriminatory practice that involves denying services to people based on their race or ethnicity. The term originated in the 1930s when the US government created color-coded maps to indicate which neighborhoods were safe for mortgages. Red was the lowest rating, given to areas that were considered too risky for loans. Redlining was a form of structural racism that prevented Black households and other communities of color from accessing home mortgages and homeownership. The practice had a number of consequences, including: racialized poverty, lack of equity, segregation, and environmental racism.

Safety: An individual's trauma history can directly impact their feelings of safety with others and within their environment. Safety is an important part of trauma-informed initiatives, which is a way of approaching trauma that acknowledges its effects and aims to reduce the likelihood of re-traumatization. Safety is emotional, physical, ecumenical, social, etc.

Trauma-Informed Practices (TIPs): Ways to support people who have experienced trauma or toxic stress. They are based on the idea that trauma can impact a person's health, behaviors, and relationships. TIPs can be used in many different settings, including schools, workplaces, and healthcare organizations.



Equitable Engagement Framework 2024-25 Strategic Plan Mid-Year Retreat

Alexander D. Cahill
Affordable Housing & Equity Director
January 8, 2025

www.townofdavidson.org

Where does this tie into other plans?

Strategic Plan



Work together to foster a culture of equity, belonging, inclusion, and advance the Town's Affordable Housing program. Provide, create, and support opportunities for all. Treat everyone with respect, dignity, and recognize every voice.

PRIORITY STRATEGIES:

1. Continue to advance the priorities identified in the Affordable Housing Needs Assessment Implementation Strategy.
2. Pursue ways to expand equity and inclusivity in Town operations and programming.
3. Engage the community in a process to explore and define what restorative justice means.
4. Research workforce housing options and opportunities.

The following Strategic Plan priority strategies provide support for this work:

"Pursue ways to expand equity and inclusivity in Town operations and programming."

"Engage the community in a process to explore and define what restorative justice means."

"Apply a Strategic Plan lens to all Town operations through policies and practices."

Climate Action Plan

Our newest plan is intentional in supporting interdepartmental collaboration and equitable engagement through its implementation framework.

Climate Action Plan

5 IMPLEMENTATION

IMPLEMENTATION FRAMEWORK

Implementation of Climate Action Plans require an integrated multidisciplinary approach, which unifies actions across Town departments and the broader community, while leveraging the embedded expertise of specific departments, Staff and Community resources appropriately. The Town's leadership, elected officials, and staff members will all be responsible for and contribute to the success of this effort. To support this process, Town department(s) have been identified as lead implementers for each foundational strategy. The Lead Department will serve as the primary responsible party for implementation of actions and in support of higher-level goals. Overall implementation will be overseen by Davidson's Sustainability Manager within the Parks & Recreation Department, while individual strategy or action responsibilities may vary across Town departments. The Sustainability Manager will coordinate across all departments and lead staff positions to ensure continuity across all efforts as well as uniform and centralized monitoring, progress, and reporting related to each action, strategy, goal, and target. Additionally, implementation may rely on contributions by Town leadership, various staff across departments, as well as participation by non-governmental organizations, businesses, residents, and other members of the public. Regular coordination with the Town's Sustainability Committee will also help guide progress toward objectives.



Let's start by setting the foundation
for equity work....



What is equity?

Equity is the process of eliminating disparities and improving outcomes for everyone. It is the intentional and continual practice of changing policies, practices, systems, and structures by emphasizing measurable change in the lives of people of color, indigenous people, women (cis and trans), people of low-wealth, disabled people, renters, the LGBTQIA+ community, those with limited English proficiency, veterans, immigrants, religious and non-religious minorities, and other historically marginalized and disinvested in groups.

What do we know about equity?

Studies on effectiveness of DEI programs show that organizations face four common challenges in furthering progress:

- **Not enough focus on equitable outcomes.**
- **More focus on solving for the individual than on solving for the system.**
- **Over-aggregated data to report progress or results.**
- **A disconnect between DEI objectives and other Town business objectives.**

We also know, from peer-reviewed studies and longitudinal research, that the number one way to mitigate or address inequities is by building wealth.

Let's build on equity and define
and connect to engagement....



What is equitable engagement?

Equitable, inclusive, valued, and empowered engagement is a process that goes beyond traditional community engagement by emphasizing the participation of those who are most affected by governmental decisions yet often least represented.

The goal of cultivating equitable engagement is to center voices that have historically been marginalized or underserved because these are the community members who are most likely to experience the greatest impact from public policies and Town projects.

This does not mean at the exclusion of everyone else!

What are the guiding principles?



- **Inclusivity:** Ensure that outreach includes people from representative demographics and backgrounds, with a particular focus on those most impacted by decisions.
- **Accessibility:** Reduce barriers to participation by providing stipends, childcare, accessible meeting spaces, transportation, food, and interpretation and translation services (as funding allows).
- **Transparency:** Communicate openly with community members about decision-making processes, including what is being decided and how their input will (or will not) be used.
- **Collaboration:** Work with community members to actively create a system, process, project, or program together.
- **Long-term Relationships:** Develop ongoing relationships with community members, prioritizing sustained engagement beyond one-time events.
- **Acknowledgment:** Acknowledge the Town of Davidson's past and present inequities. Acknowledge those working to advance the public good.

What are the goals of equitable engagement?

- **Ensure Representation:** Engage a cross-section of Davidson's population that reflects its diversity, focusing on key geographic and demographic factors.
- **Emphasize Marginalized Group Participation:** While engaging all, emphasize communities most affected by Town decisions and those who have been historically marginalized or excluded. Community efforts with a goal of equitable opportunity and outcomes to reach that goal.
- **Build Trust:** Establish long-term relationships with community members through transparent and responsive engagement.



What are the goals of equitable engagement? (Continued)

- Compensate Participation:** Provide stipends (when funds are available) to reduce barriers to participation and compensate community members for their time and contributions.
- Sustain Participation:** Foster ongoing engagement by providing multiple opportunities for community input at various stages of projects.
- Avoid Extraction:** In the extraction model of engagement, communities are not involved in developing the scope, process, or the validity of the findings. This can lead to outsiders obtaining information rather than local people gaining and using it. It can also lead to burnout and engagement fatigue.
- Validate Qualitative and Quantitative Methods of Data Collection in Engagement:** Create and perpetuate a system where qualitative comments and stories from community engagement are used to complement and support quantitative data. Recognize the benefits and value of oral narratives in conjunction with the written word.

LANGUAGE THE POWER OF WORDS

RAPPING	STORYTELLING
PREACHING	SIGNIFYING
TESTIFYING	PLAYING THE DOZENS

At its heart, African American culture is an oral culture. Enslaved blacks combined English with African vocabularies and ways of talking. They created a language that built communities and kept them going. Talking and telling connect people. New terms and expressions are born, picked up, and spread with each generation. Some master two languages or dialects—one they speak in their community and mainstream American English. How African Americans speak depends on whom they're speaking to.

Stipends & Reimbursements

There are several key best practices in equitable engagement that remove barriers to participation, the most impactful being stipends and reimbursements.

Stipend: An engagement stipend is a financial investment given to someone for their work on a community engagement project. It is the act of financially compensating individuals from a community for their time and expertise when they participate in initiatives like advisory boards, focus groups, or other engagement activities aimed at gathering input and perspectives to inform decision-making within an organization, particularly in areas like policy development; essentially, it's paying people for their valuable contributions to community engagement efforts, ensuring their voices are heard and valued. The amount of the stipend may vary depending on the project's scope, the number of hours volunteered, and the level of experience required. These can be provided through VISA gift cards and cannot exceed \$600 per individual in a calendar or fiscal year.

Reimbursements: Reimbursements can be provided to cover childcare costs and transportation to the event and help reduce a barrier to participation and would be income-based (we could also provide these services instead of reimbursing them)

What are the differing levels of engagement?

- **Inform:** Provide clear information about Town projects, policies, and decisions. Use newsletters, social media, and other community mediums to share information.
- **Consult:** Gather feedback through surveys, public comment periods, and focus groups.
- **Involve:** Provide opportunities that encourage active participation in discussions through Town meetings, workshops, and events.
- **Collaborate:** Partner with community members to co-design and implement projects, including advisory committees and task forces. Consider providing stipends to participants who engage in extended consultations, especially from underrepresented groups (as funding permits).
- **Empower:** Design measures to increase the degree of autonomy and self-determination in people and in communities to enable them to represent their interests in a responsible and self-determined way while acting on their own authority.

What are the differing levels of engagement?



How does this build on what we already do?



STANDARDIZES
ENGAGEMENT ACROSS
DEPARTMENTS



ACKNOWLEDGES THE SKILL
SETS NECESSARY AND
ASSOCIATED TRAINING
REQUIRED



ACKNOWLEDGES THE
RESOURCES REQUIRED



CREATES ADDITIONAL
OPERATIONAL STEPS,
INCLUDING CIRCLING BACK
AND ASKING "DID WE
HEAR YOU CORRECTLY"



INCREASES
TRANSPARENCY IN WHEN
AND HOW WE USE THE
INPUTS COLLECTED



HIGHLIGHTS THE
IMPORTANCE OF
QUALITATIVE AND ORAL
DATA



"People resist
by telling
their story."

- Bell Hooks



Stay with me as we thread the
needle with restorative justice....



Let's talk about the term restorative justice...



We have learned that what has been most commonly associated with reparations and/or the criminal justice system. There is no one clear definition of what it is or how it should be defined.

So far we have said we would work with the community to define AND we have the existing working definition that was presented to the Town Board in February of 2023:

Restorative Justice Working Definition: an approach to justice that seeks to repair harm by providing an opportunity for those harmed and those who take responsibility for the harm to communicate about and address their needs in aftermath of injustice.

Reframing the conversation on restorative justice...

Relationship: The principle here is that, if ever there is a need for Restorative Justice, it's because a relationship has been harmed in some way. The aim is to help repair this harm, providing a safe space to undertake responsibility and to make amends.

Respect: This principle refers to how respect allows for a safe experience for everyone involved in the Restorative Justice process. In this case, respect involves listening to the other person's perspective, whether we agree with it or not, and interacting in a way that allows for the healing process to play out safely for everyone.

Responsibility: The Responsibility principle refers to how each side must take responsibility for their part in the harm if there is any. Each party must be honest with themselves and reflect sincerely to determine if they did have a part in the incident, even if they are the harmed person.

Repair: The Repair principle refers to the accountability and responsibility that the party who had a role in the harm should undertake to repair as much harm as they can, whilst still acknowledging that they may not be able to repair all harm inflicted.

It comes down to acknowledging harm, repairing relationships, and building and re-building relationships through mutual trust!

Town Programs with a Rebuilding & Repairing Element

Current Programs/Processes With a Rebuilding & Repairing Element:

1. Historic Storytelling
2. Equitable Engagement (in draft form)
3. Equity Action Plan (in drafting process)
4. Language Access Education & Policy (in drafting process)
5. Equity Indicators (in research process)
6. Commitment to housing low-income households
7. Affordable Living Initiatives: Examples include Community Kitchen & DTAP

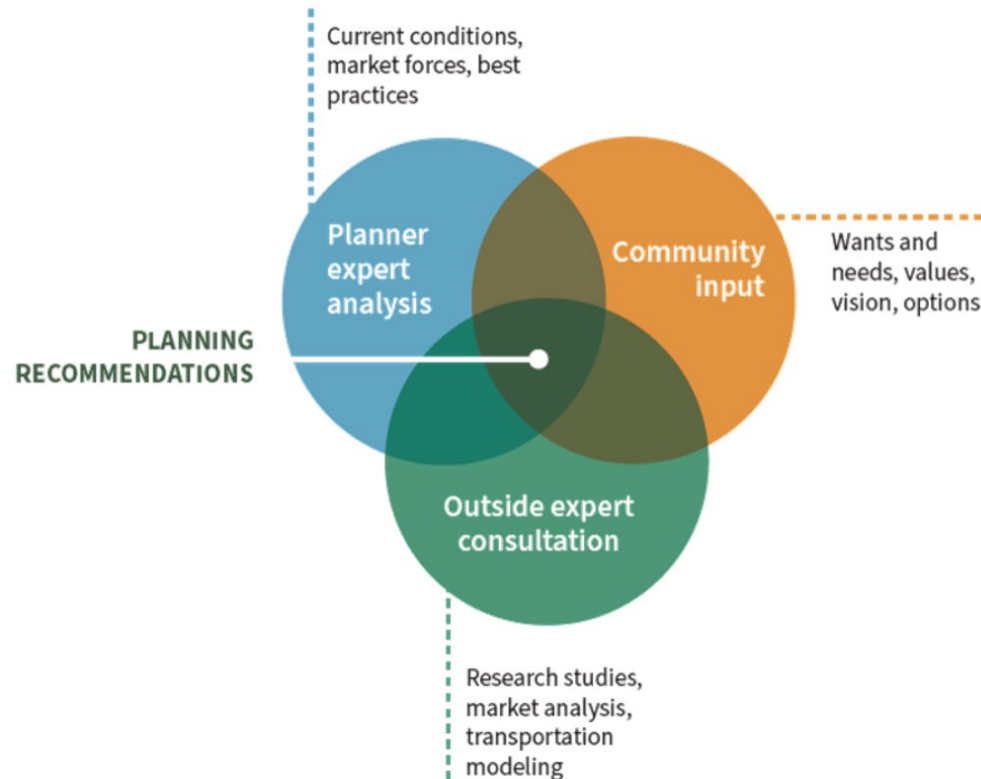
Potential Future Programs/Processes With a Potential Rebuilding & Repairing Element:

1. Intentionality around budgeting & CIP process
2. Expanding the equity focus of the AHEB
3. Affordable Housing on Town-Owned Land

What are we proposing?

1. Launch the Equitable Engagement Framework.
2. Agree to a different approach on Priority Strategy 3: "Engage the community in a process to explore and define what restorative justice means" under the Affordable Living, Equity, & Inclusion Strategy.
3. Develop a series of relationship building, repair-focused sessions, held quarterly, with communities identified as an emphasis in the equity definition and facilitated by a trauma-informed community expert. Center these sessions around a shared meal.
4. Develop Town staff skills around engagement and relationship-building.
5. Focus on rebuilding and repairing relationships both with the Town, **AND** amongst community members
6. Model the behaviors we expect to see from engagement efforts across the Town, both led by the Town, and events held within the Town.

What equitable outcomes do we expect from this?



Positive Movement on Addressing Disparities: Davidson, like many cities and towns, faces disparities in access to resources, opportunities, and decision-making power. By measuring existing conditions, we will be able to measure the change in these disparities over time.

Authentic Use of Community Feedback: Each program, policy, or major capital project balances staff expertise with outside expertise and community input (when applicable).

Key Takeaways

1. Be more intentional about the level of engagement sought from the beginning
2. Make a foundational shift in expectations around engagement for Town staff and departments
3. "Circle back" and "Close the loop" each time we engage
4. Agree to using the framework as a Town
5. Focus on the rebuilding and repairing relationships aspect of restorative justice

QUESTIONS TO GUIDE DISCUSSION:

1. What is the Board's comfort with engagement stipends? What is the Board's comfort with exploring reimbursements, including for childcare, transportation, etc.?
2. What is the Board's comfort with funding interpretation and translation services for events (as needed or proactively)?
3. What community inputs/feedback are helpful in informing Town Board decisions?
4. What suggestions/thoughts do you have on engaging? Is there anything we aren't doing that you would like to see us do?

DISCUSSION





Financial Planning

Piet Swart
Finance Director
January 8, 2025

www.townofdavidson.org

Topics

1. Financial Landscape
2. Long Term Financial Plan
Updated with FY24 Audited Financials
3. Issuance of Remaining 2017 G.O. Bonds
4. Fire Station #1 Construction Financing Options
5. Long Term Financial Plan - Modeling
6. Challenges for the FY2026 Budget
7. FY26 Budget Calendar

Economic Review

Interest Rates: Earnings with the NCCMT have dipped below 5% for the first time since May 2023 Federal Reserve Rate is Current Projection is for 2 quarter point drops in 2025.

Inflation Rates: Major inflation metrics have year-over-year inflation between 2.2% and 3.2 %. Market projections do not indicate the Feds desired rate of less than 2% in the near future.

Unemployment Rates: North Carolina 3.7%

Mecklenburg County 3.3%

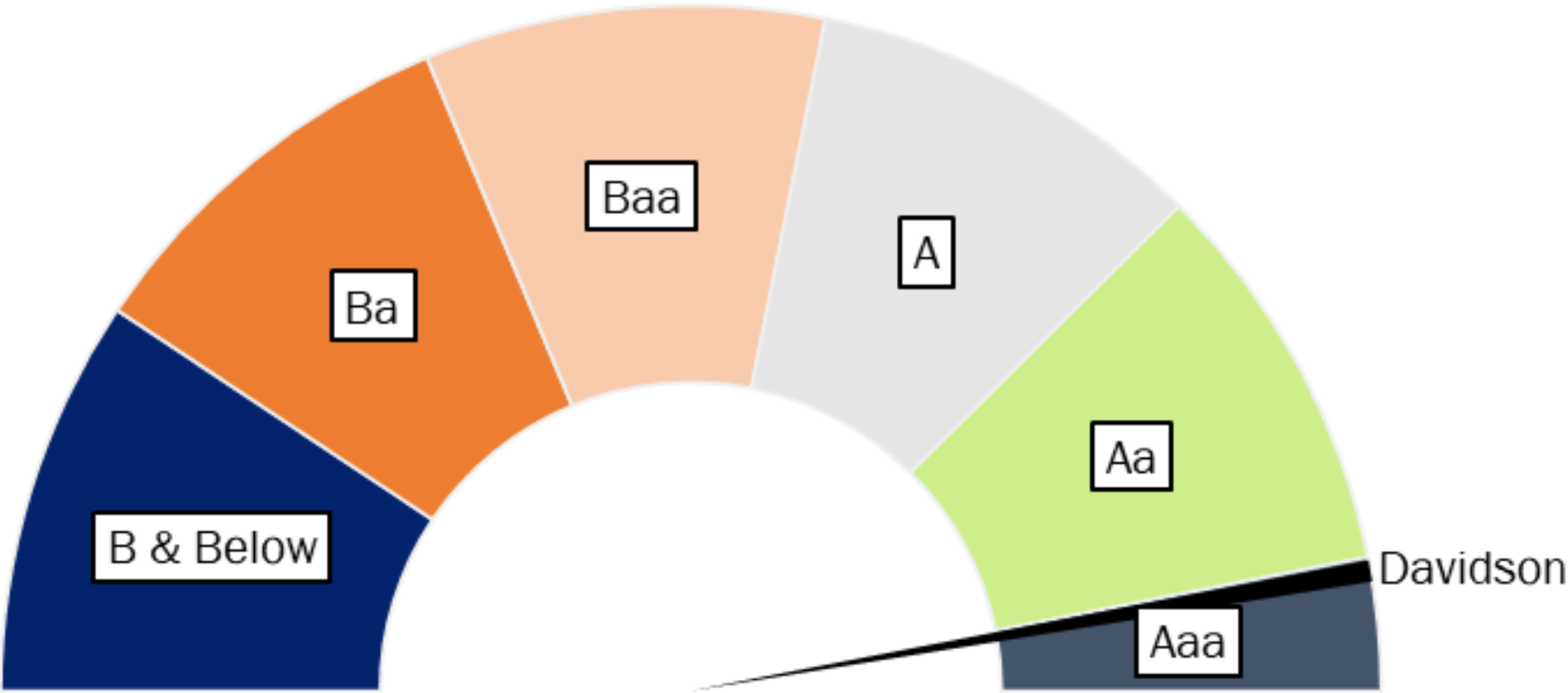
US Business cycle considered to be on the cusp between mid and late cycle.

Risk remains that a major precipitating event drives recession

Long Term Financial Plan – FY24 Audited Financials

Aaa Bond Rating Maintained

Projected Moody's Rating (General Fund)



Issuance of Remaining 2017 G.O. Bonds

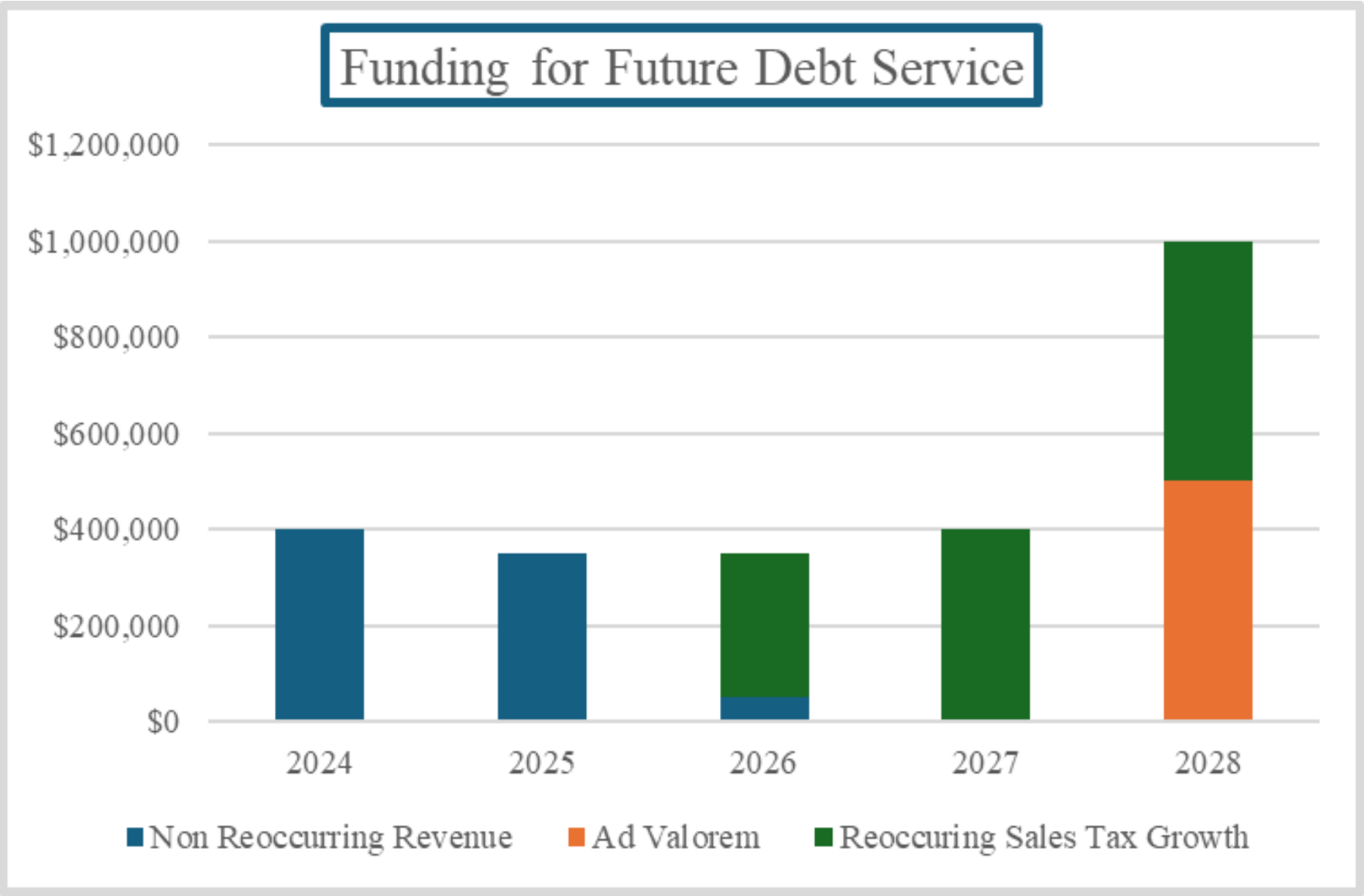
- \$7 Million in remaining bond orders which will expire in October 2027. Staff previously presented an October 2025 issuance
- Several potential positive cash flow items that may reduce or eliminate the need to issue debt:
 - ❖ Transit/Transportation Sales and Use Tax for mobility projects.
 - ❖ Sale of Town-owned land:
 - Sloan House
 - Griffith property for Red Line Station
 - Armour Street Theater
- Based on these possible items staff recommends delaying the issuance of G.O. Debt until the “snow globe” settles on these items.

Fire Station #1 Construction – Financing Options

- March 2024 discussed funding for construction of Fire Station #1 and purchase of a replacement pumper apparatus.
- Plan was to set aside \$2.5M for future debt service by FY29 and increase the ad valorem tax rate by 1-cent in FY28 (revaluation year).
- Opportunity to utilize a USDA loan which allows for a maximum 40-year loan duration – significantly reducing annual debt service and eliminating the need for a tax increase to fund debt service.

Fire Station #1 Construction – Financing Options

Setting Aside
for Future
Debt Service
Plan (*March
2024*)



Fire Station #1 Construction – Financing Options

Marketplace	Limited Obligation Bonds (Public Sale)	Installment Financing (Bank Placed)	USDA
Cost of Issuance	High	Medium	Low
Staff Time Commitment	High	Medium	Medium
Maximum Fixed Term Likely	20 Years ¹	15-20 Years ¹	30-40 Years
Flexibility to Customize Repayment	High	Medium	Low
Covenants	Medium	Medium	Low
Credit Rating / Public Disclosure	High	Low	Low
Rate Lock Lead Time	Long	Medium	Short
LGC Approval	Yes	Yes	Yes ²
Estimated Interest Rates ³	3.75%	4.35%	4.00% - 4.125%
Procurement Requirements	Medium	Medium	High
Prepayment Flexibility	Low	Medium	High

¹ Per LGC guidelines (some flexibility)

² LGC approval required for construction loan but not for long-term USDA take-out

³ Estimated as of 12/19/24, preliminary and subject to change

Fire Station #1 Construction – Financing Options

Total Construction Cost		\$18.8 Million	
Financing Method	Interest Rate/ TIC	Total Debt Service	Highest Annual Debt Service
20-Year Installment Loan	4.50%	\$ 27,683,000	\$ 1,786,000
20-Year LOBs	3.75%	\$ 25,996,500	\$ 1,707,750
40-Year USDA Loan	4.00%	\$ 37,993,664	\$ 949,842

Long Term Financial Plan Modeling

Models run included combinations of:

- Issuing remaining G.O. Bonds
- Fire Department Pumper funded with installment financing
- Fire Station #1 financed with:
 - 20-year installment financing
 - 20-year LOBs
 - 30/35/40 Year USDA Loans

Fire Station #1 Construction Schedule

Tentative Schedule:

- Design-Build Contract signed
 - Spring/Summer 2025
- Board of Commissioners asked to approve USDA Loan
 - Winter 2026
- Construction Complete
 - Summer 2027

FY26 Budget Challenges

- Salary Increase Pool
- Pay Study Implementation
- Phase in of costs on existing positions:
 - Co-Responder
 - GHSG – Traffic Position
- New Position Requests
- Set-aside Funds for Future Debt Service

FY26 Budget Calendar

BUDGET AND MEETING SCHEDULE

FY 2025/26 BUDGET

Day	Date	Action
Friday	May 9	Send proposed budget and CIP to Mayor and Board
Tuesday	May 13	Mayor and Board review proposed budget and CIP
Tuesday	May 27	Budget Public Hearing
Tuesday	June 10	Discuss Budget during Board Meeting (if needed); adopt budget

Discussion



Town of Davidson, NC
Estimated Debt Service - Fire Station #1
Traditional Installment Financing vs. USDA

20-Year Installment Financing at 4.50%				20-Year LOBs at 3.75% (Estimated TIC)				30-Year USDA Financing at 4.00%				35-Year USDA Financing at 4.00%				40-Year USDA Financing at 4.00%			
Fiscal Year	Principal	Interest	Total	Fiscal Year	Principal	Interest	Total	Fiscal Year	Principal	Interest	Total	Fiscal Year	Principal	Interest	Total	Fiscal Year	Principal	Interest	Total
2029	940,000	846,000	1,786,000	2029	855,000	852,750	1,707,750	2029	335,206	752,000	1,087,206	2029	255,254	752,000	1,007,254	2029	197,842	752,000	949,842
2030	940,000	803,700	1,743,700	2030	855,000	810,000	1,665,000	2030	348,614	738,592	1,087,206	2030	265,464	741,790	1,007,254	2030	205,755	744,086	949,842
2031	940,000	761,400	1,701,400	2031	855,000	767,250	1,622,250	2031	362,559	724,647	1,087,206	2031	276,082	731,171	1,007,254	2031	213,985	735,856	949,842
2032	940,000	719,100	1,659,100	2032	855,000	724,500	1,579,500	2032	377,061	710,145	1,087,206	2032	287,126	720,128	1,007,254	2032	222,545	727,297	949,842
2033	940,000	676,800	1,616,800	2033	855,000	681,750	1,536,750	2033	392,143	695,062	1,087,206	2033	298,611	708,643	1,007,254	2033	231,447	718,395	949,842
2034	940,000	634,500	1,574,500	2034	855,000	639,000	1,494,000	2034	407,829	679,377	1,087,206	2034	310,555	696,699	1,007,254	2034	240,705	709,137	949,842
2035	940,000	592,200	1,532,200	2035	855,000	596,250	1,451,250	2035	424,142	663,064	1,087,206	2035	322,977	684,276	1,007,254	2035	250,333	699,509	949,842
2036	940,000	549,900	1,489,900	2036	855,000	553,500	1,408,500	2036	441,108	646,098	1,087,206	2036	335,896	671,357	1,007,254	2036	260,346	689,496	949,842
2037	940,000	507,600	1,447,600	2037	855,000	510,750	1,365,750	2037	458,752	628,453	1,087,206	2037	349,332	657,921	1,007,254	2037	270,760	679,082	949,842
2038	940,000	465,300	1,405,300	2038	855,000	468,000	1,323,000	2038	477,102	610,103	1,087,206	2038	363,306	643,948	1,007,254	2038	281,590	668,251	949,842
2039	940,000	423,000	1,363,000	2039	855,000	425,250	1,280,250	2039	496,187	591,019	1,087,206	2039	377,838	629,416	1,007,254	2039	292,854	656,988	949,842
2040	940,000	380,700	1,320,700	2040	850,000	382,500	1,232,500	2040	516,034	571,172	1,087,206	2040	392,951	614,302	1,007,254	2040	304,568	645,274	949,842
2041	940,000	338,400	1,278,400	2041	850,000	340,000	1,190,000	2041	536,675	550,530	1,087,206	2041	408,669	598,584	1,007,254	2041	316,751	633,091	949,842
2042	940,000	296,100	1,236,100	2042	850,000	297,500	1,147,500	2042	558,142	529,063	1,087,206	2042	425,016	582,238	1,007,254	2042	329,421	620,421	949,842
2043	940,000	253,800	1,193,800	2043	850,000	255,000	1,105,000	2043	580,468	506,738	1,087,206	2043	442,017	565,237	1,007,254	2043	342,598	607,244	949,842
2044	940,000	211,500	1,151,500	2044	850,000	212,500	1,062,500	2044	603,687	483,519	1,087,206	2044	459,697	547,556	1,007,254	2044	356,302	593,540	949,842
2045	940,000	169,200	1,109,200	2045	850,000	170,000	1,020,000	2045	627,834	459,372	1,087,206	2045	478,085	529,168	1,007,254	2045	370,554	579,288	949,842
2046	940,000	126,900	1,066,900	2046	850,000	127,500	977,500	2046	652,948	434,258	1,087,206	2046	497,209	510,045	1,007,254	2046	385,376	564,466	949,842
2047	940,000	84,600	1,024,600	2047	850,000	85,000	935,000	2047	679,066	408,140	1,087,206	2047	517,097	490,157	1,007,254	2047	400,791	549,051	949,842
2048	940,000	42,300	982,300	2048	850,000	42,500	892,500	2048	706,228	380,978	1,087,206	2048	537,781	469,473	1,007,254	2048	416,822	533,019	949,842
2049	-	-	-	2049	-	-	-	2049	734,477	352,729	1,087,206	2049	559,292	447,961	1,007,254	2049	433,495	516,346	949,842
2050	-	-	-	2050	-	-	-	2050	763,856	323,349	1,087,206	2050	581,664	425,590	1,007,254	2050	450,835	499,006	949,842
2051	-	-	-	2051	-	-	-	2051	794,411	292,795	1,087,206	2051	604,930	402,323	1,007,254	2051	468,869	480,973	949,842
2052	-	-	-	2052	-	-	-	2052	826,187	261,019	1,087,206	2052	629,128	378,126	1,007,254	2052	487,623	462,218	949,842
2053	-	-	-	2053	-	-	-	2053	859,235	227,971	1,087,206	2053	654,293	352,961	1,007,254	2053	507,128	442,713	949,842
2054	-	-	-	2054	-	-	-	2054	893,604	193,602	1,087,206	2054	680,464	326,789	1,007,254	2054	527,413	422,428	949,842
2055	-	-	-	2055	-	-	-	2055	929,348	157,858	1,087,206	2055	707,683	299,571	1,007,254	2055	548,510	401,332	949,842
2056	-	-	-	2056	-	-	-	2056	966,522	120,684	1,087,206	2056	735,990	271,263	1,007,254	2056	570,450	379,391	949,842
2057	-	-	-	2057	-	-	-	2057	1,005,183	82,023	1,087,206	2057	765,430	241,824	1,007,254	2057	593,268	356,573	949,842
2058	-	-	-	2058	-	-	-	2058	1,045,390	41,816	1,087,206	2058	796,047	211,206	1,007,254	2058	616,999	332,843	949,842
2059	-	-	-	2059	-	-	-	2059	-	-	-	2059	827,889	179,365	1,007,254	2059	641,679	308,163	949,842
2060	-	-	-	2060	-	-	-	2060	-	-	-	2060	861,005	146,249	1,007,254	2060	667,346	282,495	949,842
2061	-	-	-	2061	-	-	-	2061	-	-	-	2061	895,445	111,809	1,007,254	2061	694,040	255,802	949,842
2062	-	-	-	2062	-	-	-	2062	-	-	-	2062	931,263	75,991	1,007,254	2062	721,802	228,040	949,842
2063	-	-	-	2063	-	-	-	2063	-	-	-	2063	968,513	38,741	1,007,254	2063	750,674	199,168	949,842
2064	-	-	-	2064	-	-	-	2064	-	-	-	2064	-	-	-	2064	780,701	169,141	949,842
2065	-	-	-	2065	-	-	-	2065	-	-	-	2065	-	-	-	2065	811,929	137,913	949,842
2066	-	-	-	2066	-	-	-	2066	-	-	-	2066	-	-	-	2066	844,406	105,436	949,842
2067	-	-	-	2067	-	-	-	2067	-	-	-	2067	-	-	-	2067	878,182	71,660	949,842
2068	-	-	-	2068	-	-	-	2068	-	-	-	2068	-	-	-	2068	913,309	36,532	949,842
Total	18,800,000	8,883,000	27,683,000	Total	17,055,000	8,941,500	25,996,500	Total	18,800,000	13,816,176	32,616,176	Total	18,800,000	16,453,878	35,253,878	Total	18,800,000	19,193,664	37,993,664



Red Line Commuter Rail: Station Area Planning

Mid-Term Retreat
January 8, 2025

Presentation Outline

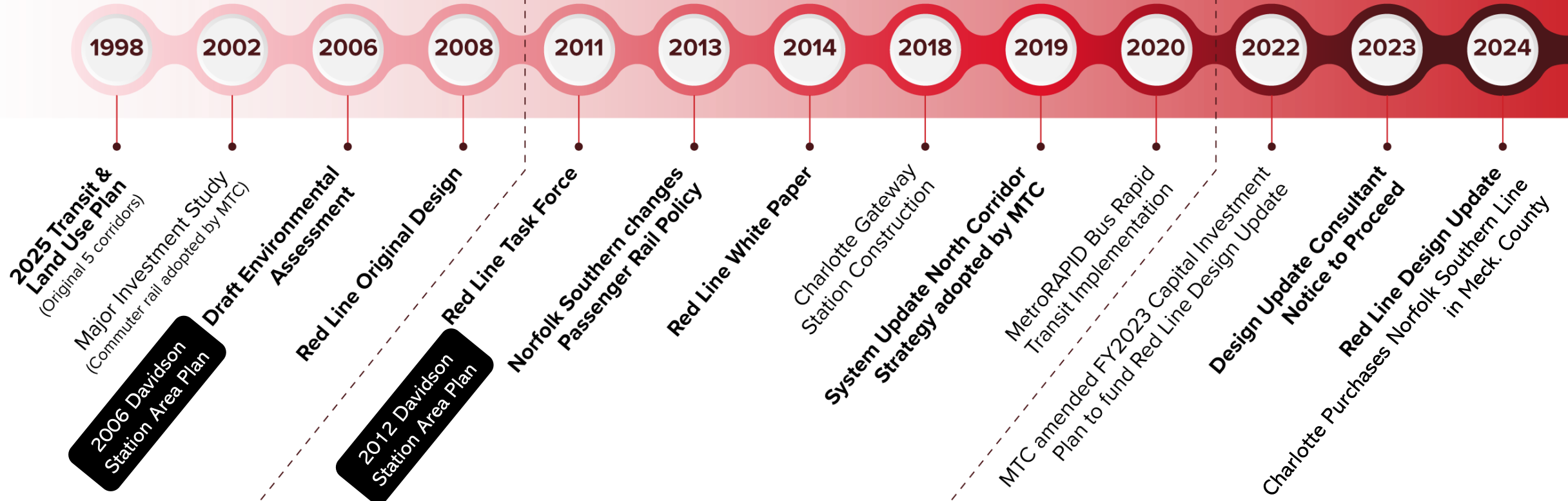
- Red Line Project History + Next Steps
- Light Rail vs. Commuter Rail
- Red Line Project Scope
- Station Options + Evaluation Criteria
- Public Engagement Strategies (Near Term)
- Next Steps (Near Term)

Red Line Project History

Traditional Approach

Alternative Funding & Related Projects

A Path Forward



Red Line Project History

Local Process

Transportation System Plan

- Mobility package for rail, roads, buses and bikes
- Request additional funding for Mecklenburg County
- State Legislature Authorization and Public Referendum

Federal Transit Administration Grant Process

Project Development

- Approximately 2 years
- Enter Federal Process
- Continue Design to 65%

Construction

- Approximately 3-4 years

Design Update

- Approximately 15 months
- Uptown alignment analysis
- Confirm station locations
- Update operations plan
- Update cost estimate

30% Design & NEPA Process

- Approximately 2 years
- Environmental Document
- Preliminary Design

Project Engineering

- Approximately 1-2 years
- Complete Design
- Acquire Property
- Federal Funding Agreement

Service Begins

Red Line: Light Rail vs. Commuter Rail



Red Line Design Update Scope

The first phase of the Red Line Design Update will be completed by early 2025. It will focus on:

- Public involvement and stakeholder coordination
- Updating the previous design from 2008
- Assess the previously identified station locations
- Examining new options for a new vehicle maintenance facility
- Reevaluating vehicle technologies and frequency of service
- Analyzing new alignment options into Uptown Charlotte
- Providing an updated cost estimate



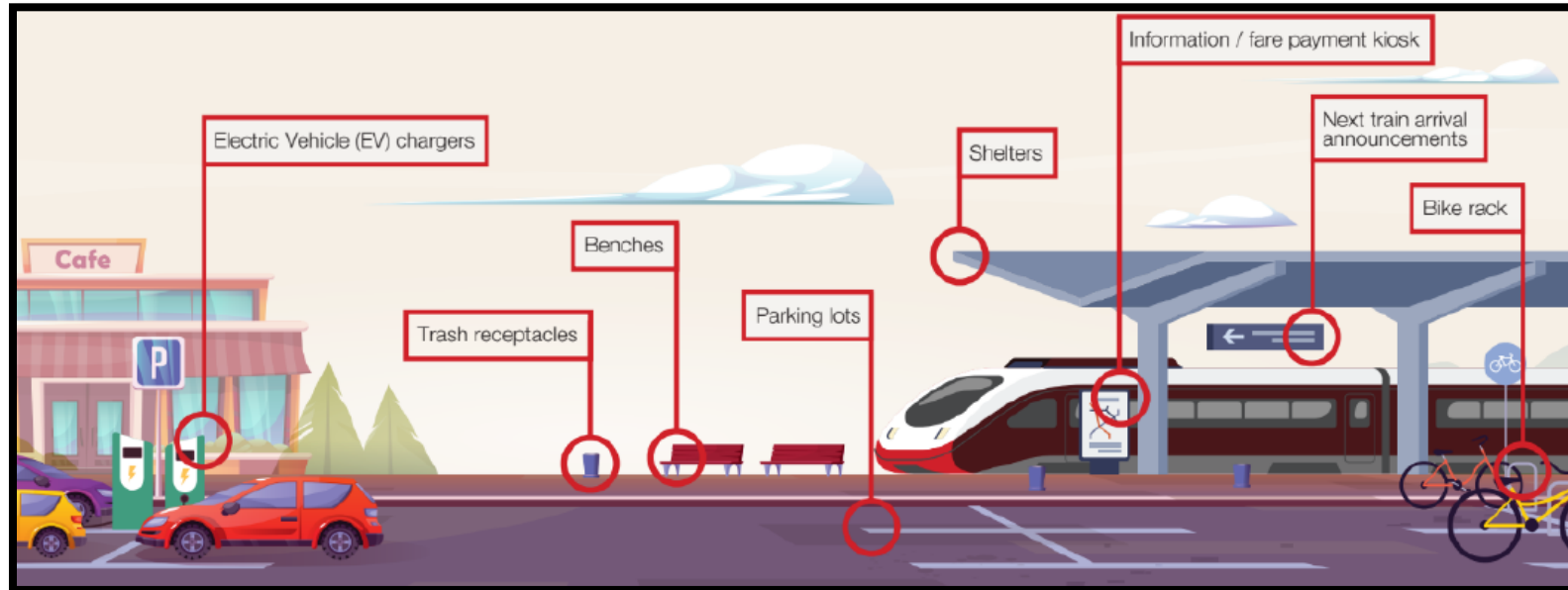
Red Line Details

What does service look like?

- Robust commuter rail
- 42 trains/day
- Day/Night + weekend service
- 45 minutes from Mt. Mourne-Gateway Station

What does a station look like?

- Park + Ride (structured parking)
- Shelter
- Mobility Hub (bus services + first/last mile connections)
- Incorporated into transit-oriented development
- Amenities (EV, bike racks, Wifi)
- Infrastructure connections (sidewalks + trails)



Station Options

Current Station Options

Site A: Fire Station

- North of Griffith Street
- Owned by Town
- Proposed future Fire Station #1

Site B: Sadler Square

- South of Griffith Street
- Owned by Piedmont Capital
- Currently under renovation

Site C: Linden Mill/Jackson Street

- Jackson Street alignment
- Owned by Linden Mills LLC
- Future Redevelopment
- Brownfield site



Public Engagement Summary (to date)

Spring 2024 Public Meetings

Davidson, Huntersville, Charlotte, & Virtual

Fall 2024 Public Meetings

Charlotte, Cornelius, Huntersville, & Virtual

Top Community Priorities for Station Amenities/Red Line Feedback

Davidson Residents:	Davidson College:	Davidson Businesses:
○ Sidewalk access & trail connections ○ Bus/transit connections ○ Crosswalk improvements ○ Rideshare and microtransit pick-up/drop-off ○ Parking structures ○ EV charging	○ Very excited ○ When does it start?	○ Very excited ○ Retail businesses could support 1-cent sales tax ○ Major employers support Red Line

Red Line Station Evaluation (CATS)

CATS Station Location evaluation

Collaborate with towns to evaluate data/variables and develop station typologies

Station Typologies

1. Downtown or “Destination” Type
2. Regional Commuter Hub/Community Center
3. Commuter Neighborhood/Neighborhood Center
4. Inbound Terminal Type
5. Outbound Terminal Type

Station Area Planning

- CATS-funded Small Area Plan for each stop along corridor
- Davidson-specific planning



Evaluative Factors			Challenge to Improve (Low to High "Lift")
1	Adjacent Land Use Character Progress Toward Transit-Supportive Land Uses	1 2 3 4 5 	Low/Med
2	Adjacent Land Available to Development More Ripe for Land Assembly and Development	1 2 3 4 5 	Med
3	Adjacent Land Use Compatibility (TOD Readiness via Market and Policy/Zoning) More Transit-Oriented Development Opportunity	1 2 3 4 5 	Med
4	Adjacent Transportation Fabric Progress Toward Connectivity for Station Access	1 2 3 4 5 	Low
5	Multimodal Accessibility Progress Toward Nonvehicular Access to Station	1 2 3 4 5 	Med
6	Adjacent Development's Orientation to Transportation Choices Progress Toward Less SOV Dependence	1 2 3 4 5 	Med/High
7	Ability to Accommodate Station Facilities Ease to Accommodate Station, Park & Ride, etc.	1 2 3 4 5 	Med/High
D1	Restoring and Protecting Community Assets and Housing in West Davidson Progress to Avoid Impacts to W. Davidson	1 2 3 4 5 	Med

Town Evaluation Matrix

Internal Evaluation Criteria

- Location
- Financial
- Land Use
- Successes
- Intangibles

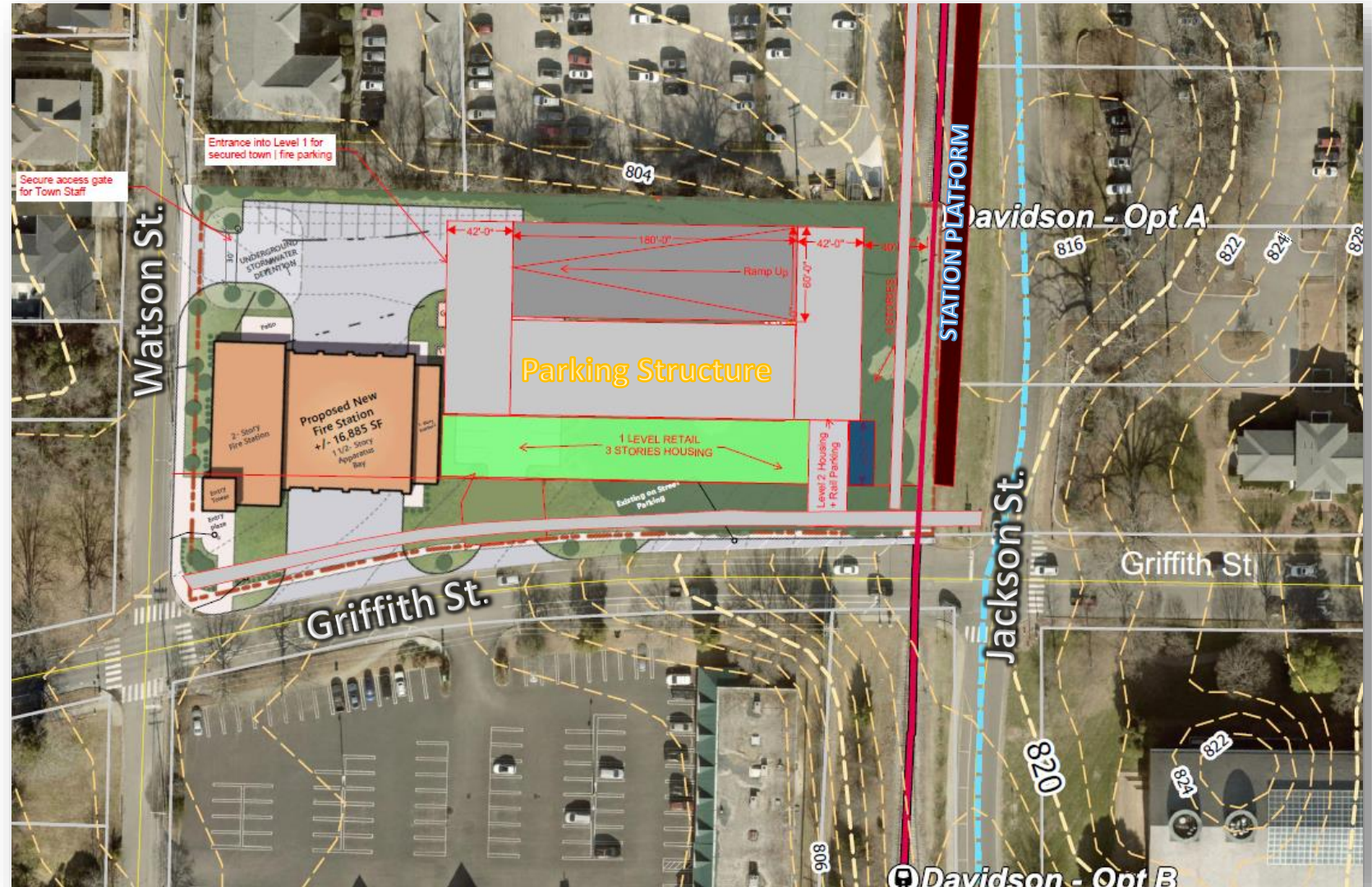
Red Line Station Options Evaluation Matrix: 2024				
CRITERIA	DESCRIPTION	A: Fire Station (N. Griffith)	B: Sadler Square (S. Griffith)	C: Linden Mill/Jackson St.
Location : Multimodal Accessibility	Location easily accessible to pedestrians and bicyclists	Above Avg: Bike lanes and sidewalks on Griffith and nearby, CATS 77x and 97 close by	Above Avg: Bike lanes and sidewalks on Griffith and nearby, CATS 77x and 97 close by	Avg: Sidepath on Jackson; CATS 77x and 97 close by
Location: Existing Transp. Infrastructure	Good frontage on a primary street?	Above Avg: Griffith primary access street to town	Above Avg: Griffith primary access street to town	Below Avg: Jackson/Depot secondary streets
Financial: ToD Benefit/Needs	Town directly benefits from the station location (revenue/cost)	Above Avg: Potential collaboration with Fire Station development/cost sharing; Development tax revenue; Local tax reduction	Avg: Redevelopment tax revenue	Above Avg: Development of tax revenue on Jackson St wrapped deck/cost sharing; Local tax reduction
Financial: Economic Development Potential	Development potential onsite and adjacent parcels	Above Avg: Small development potential onsite & backside of college properties on Jackson	Avg: Redevelopment of Sadler	Above Avg: Redevelopment of Linden Mill/Jackson St. potential
Land Use: Parking to Benefit Downtown	Positively impact downtown parking needs	Below Avg: 1/4 mile from downtown	Avg: 500' from downtown	Above Avg: Closest to downtown
Land Use: College Needs	Positively impact college needs	Above Avg: Closest for potential College users	Avg: Close for potential College users	Below Avg. Furthest from College
Land Use: Neighborhood Impact	Impacts on adjacent residential neighborhood	Above Avg. No immediate residential impacts on east side of parcel	Avg. Residential on Watson/Depot	Above Avg. No residential nearby
Land Use: Environmental Impacts	Impacts on trees, impervious restrictions	Below Avg. Loss of trees; Watershed (BUA Averaging?)	Avg. Minimal trees; Watershed (BUA Averaging?)	Avg. Street trees; Watershed (BUA Averaging?)
Land Use: Environmental Impacts (other)	Asbestos contamination	Above Avg. Initial testing shows negative asbestos.	Below Avg. Asbestos presumed to be buried on site	Above Avg. Jackson St. testing shows negative asbestos. Does not include Linden Mill.
Land Use: Historic Preservation	Historic resources (Depot building) being saved/incorporated into station design; Historic district location	Avg. Would require moving of historic depot. No district designation	Above Avg. Would not require moving. No district designation.	Avg. Would not require moving. Local and National Register District (cost + additional regs)
Land Use: Traffic Impacts	Potential impacts on traffic	TBD	TBD	TBD
Success: Accommodate Station Needs	Ease to accommodate station and Park & Ride	Above Avg. Satisfies needs	Above Avg. Satisfies needs	Below Avg: Parking deck on opposite side of tracks of station; street crossing
Success: Ridership Potential	High ridership potential	Above Avg. Vehicle access; Need demographic data	Above Avg. Vehicle access. Need demographic data	Avg. Vehicle access more difficult.
Intangibles: Timing	Shorter timeline	Avg. Fire station could be built independently	Avg. Developer could work plans around Red Line; Current Sadler Sq refresh	Avg. Developer could work plans around Red Line
Intangibles: Affordable Housing Potential	Development potential of Affordable Housing	Avg. Limited amount of space for Affordable Housing due to parcel size	Above Avg. More potential for Affordable due to lot size	Below Avg. Residential not allowed on Linden Mill site, limited potential on Jackson Street due to parcel size

Station Option A: Fire Station Site

Internal Evaluation Criteria

- Location
- Financial
- Land Use
- Successes
- Intangibles

* *Current preferred option*



Station Option B: Sadler Square

Internal Evaluation Criteria

- Location
- Financial
- Land Use
- Successes
- Intangibles



Station Option C: Linden Mill/Jackson St.

Internal Evaluation Criteria

- Location
- Financial
- Land Use
- Successes
- Intangibles



*Note: Very rough conceptual drawing. CATS has not fully evaluated this site.

Future Public Engagement Strategy (Near Term)

Davidson Red Line Information Sharing Events

- Jan. 30: Hurt Hub (evening + virtual)
- Feb. 18: Ada Jenkins Center (mid-day + virtual)

CATS Public Engagement Events

- Feb./Mar (Dates: TBD)
Show info/results of Design Update, Ridership Estimates, Cost Estimates

Next Steps (Near Term)

- ❑ **Early 2025:** Legislation introduced at NC General Assembly to authorize voters of Mecklenburg County to determine by referendum the proposed one-cent sales tax for further investment in roadway and public transportation systems
- ❑ **April 2025:** Board of Commissioners takes action to confirm Davidson's preferred station location
- ❑ **November 2025:** If authorized, Mecklenburg County puts referendum on the ballot. *Opportunities for public input and discourse prior to referendum.*
- ❑ **July 2026:** If referendum passes, new sales tax levy would start.
→ \$3.2m/year for Davidson

DISCUSSION





2024-2025 Strategic Plan Look Ahead

Austin Nantz
Assistant Town Manager
January 8, 2025

www.townofdavidson.org

History

- In February of 2024 the Board of Commissioners and the Management Team participated in a strategic retreat to develop the board's two-year strategic plan.
- The planning process included completing a SWOT Plus (strengths, weaknesses, opportunities, threats) analysis, a review of the descriptions of the 2022-2023 Strategic Plan Goals and identifying new plan goals and strategies for the 2024-2025 plan.
- The result of this work was a strategic plan with seven goals, updated goal descriptions, and priority strategies.

Healthy, Livable, & Vibrant Community



Promote collaborative efforts to create livable spaces and healthy places to enhance quality of life for all residents.

Healthy, Livable and Vibrant-Priority Strategies

1. Create a healthy environment for the physical and mental well-being of all residents.
2. Encourage a well-planned built environment through exceptional design standards and practices.
3. Collaborate with community partners to leverage assets and support goals.
4. Provide a safe and secure community utilizing best practices and standards.
5. Pro-actively engage residents to contribute in positive and meaningful ways for the greater community good.

Healthy, Livable and Vibrant-2025 Action Items

- Historic Gym rehabilitation begins
- Fire Department Standards of Cover /and Strategic Plan continues
- Park Projects in 2025: Kincaid Greenway extension, Roosevelt Wilson Park, Armour Street Pier, Nature Preserve Pier
- Application for Assistance for Firefighters Grant submitted
- Fire staffing change (PT/FT) discussion
- Implement updates from Parks and Rec Master Plan
- Continue Police Department staffing analysis
- Hold Touch a Truck spring event
- Commissioner Chats scheduled January-May, picking up again in the fall



Preserve the historic character of our Town, including its people, places, & stories. Honor the history of our residents through their lived experiences.

Historic Preservation-Priority Strategies

1. Prioritize & implement recommendations from historic preservation plan.
2. Continue to expand local historic district.
3. Support and encourage storytelling initiatives to capture the lived experiences of residents.
4. Explore legislative options to secure demo deny authority.
5. Educate property owners on the use of historic tax credits and design standards.
6. Revise historic district standards.
7. Explore the effects/impact that National Historic District may have on naturally occurring affordable housing.

Historic Preservation-2025 Action Items

- Issue RFP for Sloan House
- Present recommended updates to design standards
- Unveil/present Lakeside Neighborhood signs
- Place additional Historic District Signs
- Work on story map for West Davidson
- Study Lakeside neighborhood as historic or heritage neighborhood

Connecting People and Places



Expand, improve, and diversify the Town's transportation network to provide residents and visitors with safe, convenient, accessible, reliable, and efficient multi-modal travel choices to connect people across the community.

Connecting People & Places-Priority Strategies

1. Prioritize & implement mobility plan recommendations for policies, programs, and projects.
2. Allocate resources for Vision Zero Plan.
3. Work with CATS to improve local and regional transit services and accelerate construction of transit stop amenities.
4. Review and determine any updates to Traffic Impact Analysis (TIA) standards.
5. Address existing sidewalk gaps in a contextually sensitive manner.
6. Prioritize and implement projects from the Capital Improvement Plan (CIP) and pursue grant opportunities for funding.
7. Continued focus on connecting Iredell, East, ETJ neighborhoods to Town.
8. Review maintenance program for greenways and identify safety improvements.

Connecting People & Places-2025 Action Items

- Develop 5-year Capital Improvement Plan (CIP) for FY2026-2030
- GRASP Committee will work with The Ferguson Group to pursue grant opportunities
- Finalize Greenway Maintenance Program
- Finalize CATS bus stop improvements scope
- Concord Road sidewalk modernization
- Revise Traffic Impact Analysis (TIA) standards
- Pedestrian Crossing Beacons
- CIP Projects in 2025: Potts-Sloan Corridor, Davidson-Concord/Robert Walker Roundabout, Kincaid Trail Extension

Affordable Living, Equity and Inclusion



Work together to foster a culture of equity, belonging, inclusion, and advance the Town's Affordable Housing program. Provide, create, and support opportunities for all. Treat everyone with respect, dignity, and recognize every voice.

Affordable Living-Priority Strategies

1. Continue to advance the priorities established with the Affordable Housing Needs Assessment Implementation Strategy.
2. Pursue ways to expand equity and inclusivity in Town operations and programming.
3. Engage the community in a process to explore and define what restorative justice means.
4. Research workforce housing options and opportunities.

Affordable Living-2025 Action Items

- Present recommended updates to section 5 of the Davidson Planning Ordinance (DPO)
- Develop plan for recently awarded HUD land acquisition grant
- Launch Community Navigator demonstration program
- Implement Equitable Engagement Framework
- Create and implement Language Access Plan
- Launch Equity Innovation Grant program
- Establish Equity Speaker series
- Continue engagement with Development Finance Initiative (DFI) for affordable housing on town-owned land
- Complete sale of additional Parkside Affordable Townhomes
- Launch Innovation Lab concept with community partners

Sustainability and Natural Assets



Preserve Davidson's natural assets and develop, implement, and actively encourage innovative solutions to environmental, energy, and climate-based challenges.

Sustainability-Priority Strategies

1. Develop a specific approach to land preservation with partners and support Mecklenburg County's efforts on farmland preservation.
2. Implement the priorities established by the Climate Action Plan (CAP).
3. Research available grant opportunities to fund implementation of Climate Action Plan (CAP) initiatives.
4. Finalize and implement the Urban Community Forestry Plan (Tree Canopy Master Plan).
5. Identify and pursue ways to model desired behavior supportive of improving sustainability & environmental awareness.
6. Strive to improve energy efficiency in Town-owned buildings.
7. Improve energy efficiency in Town-owned affordable housing through the promotion of programs and ensuring sustainability is incorporated in affordable housing development.

Sustainability-2025 Action Items

- Work with Mecklenburg County on sustainable land practices, Voluntary Agricultural District
 - Identify opportunities to implement sustainability principles where possible in the planning/permitting processes
 - Install Level III EV charger at Town Hall and Community Center
 - Develop a fleet transition strategy
 - Electric tool demos on Earth Day
 - Submit proposal to participate in the NASA DEVELOP National Program project proposal (air quality and heat mapping)
- Two (2) grants currently in progress: DEQ CWRAR Recycling Grant –improve Downtown recycling. Red bins; signage early 2025. DEQ Level 2 Charging Station – contractor chosen, installation January 2025
 - Three (3) EECBG DEQ grants submitted and awaiting response
 - Two (2) DEQ grants on the horizon, Level 3 Charging Station and Weatherization Assistance program

Economic Development



Attract diverse commercial development contributing to Davidson's unique economy and support new initiatives to create local jobs and add to the vibrancy of the community.

Economic Development-Priority Strategies

1. Continue to implement the Downtown Small Area Plan priorities.
2. Focus on economic development along Hwy 73/East Davidson, Downtown, South Main, and Circles @ 30.
3. Expand outdoor events and programs that support local businesses.
4. Continue support for Minority Women Small Business Enterprise (MWSBE) through a partnership with Hurt Hub and Amplify Davidson.
5. Update Economic Development Strategic Plan for next 5 years.
6. Seek collaborative solutions to support local farming and food topics.
7. Support downtown business community by exploring data-driven parking solutions.

Economic Development-2025 Action Items

- Continue to implement the Downtown Small Area Plan priorities
- Participate in local job fair for businesses
- Support and promote the Community Kitchen at Ada Jenkins Center
- Launch new events:
 - Touch a Truck
 - PorchFest
 - Art Crawl on Thursdays
- Explore mid-week market and food trucks at Ada Jenkins Center
- Update Economic Development Strategic Plan

Operational Excellence



Provide efficient and high-quality public services and facilities through thoughtful and proactive planning, responsible stewardship of Town resources and a professional and committed workforce.

Operational Excellence-Priority Strategies

1. Apply a Strategic Plan lens to all Town operations through policies and practices.
2. Create and maintain user-friendly “metrics dashboard” that monitors and displays Comprehensive Plan key metrics.
3. Develop a five-year staffing needs forecast.
4. Proactively maintain AAA/Aaa bond rating through sound financial management practices.
5. Review Town policies and work with Departments to ensure that departmental policies and guidelines are in line with Town wide policies.
6. Evaluate technology tools that can improve efficiency, transparency, and accessibility.

Operational Excellence-2025 Action Items

- Implement Atlas One Community Notification App
- Install Automatic Defibrillators (AED) at Town Hall and Community Center and train staff to operate
- Conduct Employee Pay Study in advance of FY2026 budget recommendations
- Continue development of key metrics
- Investigate options for Town-wide employee training platform
- Explore tools to improve Town website accessibility
- Issue G.O. Bonds to continue project work
- Focus on succession planning/workforce development
- Explore additional ways to evaluate community engagement and outreach efforts (i.e: increased number of commissioner chats and enhanced promotion + implementing standardized follow up measures post-event)
- Initiate the decentralization of Town's social media platforms to increase engagement within target audiences and provide curated content based on to residents' specific interests (DPR/DPD/DFD/PW)

DISCUSSION

