

DRAFT MEETING MINUTES

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TOWN OF APEX TOWN COUNCIL WORK SESSION THURSDAY, APRIL 30, 2026 3:30 P.M.

10 The Apex Town Council met for a work session on Thursday, April 30, 2026 at
11 3:30 p.m. at the Apex Town Hall located at 73 Hunter Street in Apex North
12 Carolina.

13 This meeting was open to the public. Members of the public were able to attend this
14 meeting in-person or watch online via the livestream on the Town's YouTube Channel:
15 <https://www.youtube.com/watch?v=A-e981iENBc&t=1049s>

16 [ATTENDANCE]

17 Elected Body

18 Mayor Jacques K. Gilbert (presiding)
19 Mayor Pro-Tempore Terry Mahaffey
20 Councilmember Ed Gray
21 Councilmember Arno Zegerman
22 Councilmember Shane Reese
23 Councilmember Sue Mu

24 Town Staff

25 Deputy Town Manager Shawn Purvis
26 Assistant Town Manager Demetria John
27 Assistant Town Manager Marty Stone
28 Town Attorney Laurie Hohe
29 Town Clerk Allen Coleman

30 All other staff members will be identified appropriately below.

31 [CALL TO ORDER & PLEDGE OF ATTENDANCE]

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33
34 **Mayor Gilbert** called the meeting to order at 3:30 p.m., welcomed everyone,
35 and led everyone in the pledge of allegiance. He recognized Councilmember Reese's
36 birthday and all members to join in a celebratory song to recognize Councilmember
37 Reese.

1 **[ADVANCING TREE PROTECTION IN APEX]**
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3 **Planner III, Bruce Venable**, said that the purpose of this presentation was to
4 give recommendations for Apex’s tree protection and to get further direction from the
5 Town Council.
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7 **Environmental Advisory Board (EAB) Board Liaison, Nora Skinner**,
8 presented the following presentation on Advancing Tree Protection in Apex:
9

10 **[SLIDE NO. 1]**



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12 **[SLIDE NO. 2]**



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1 **[SLIDE NO. 3]**

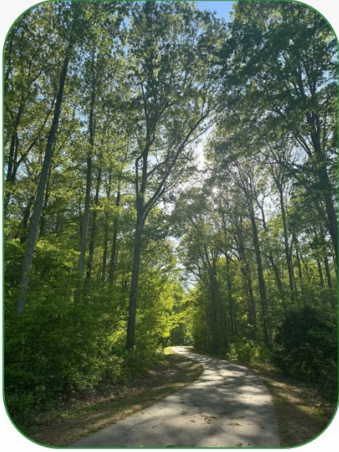
Purpose

- **Goal:** EAB recommendations to strengthen long-term protection of trees and natural areas across the Town of Apex
- **Recommendations are informed by:**
 - 2018 Wake County Trees and Stormwater Survey
 - 2023 Wake County Land Cover Analysis & Tree Canopy Assessment
 - Cape Fear Alliance for Trees' Code and Canopy document
 - Best practices from peer municipalities
- **Intended Outcome:** Council feedback to advance priority strategies

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3 **[SLIDE NO. 4]**

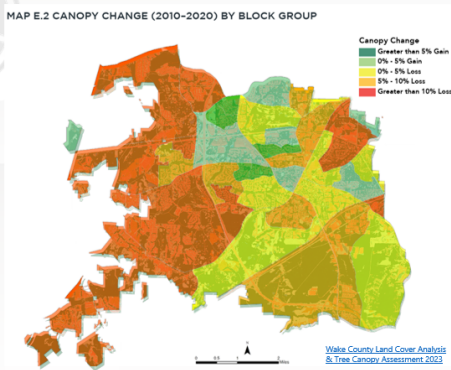
What is an Urban Tree Canopy?

- **Canopy** = The layer of leaves and branches that provides shade.
- **Urban Tree Canopy** = The % of land area covered by tree canopy. Includes natural and impervious surfaces under the canopy.



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5 **[SLIDE NO. 5]**

MAP E.2 CANOPY CHANGE (2010-2020) BY BLOCK GROUP

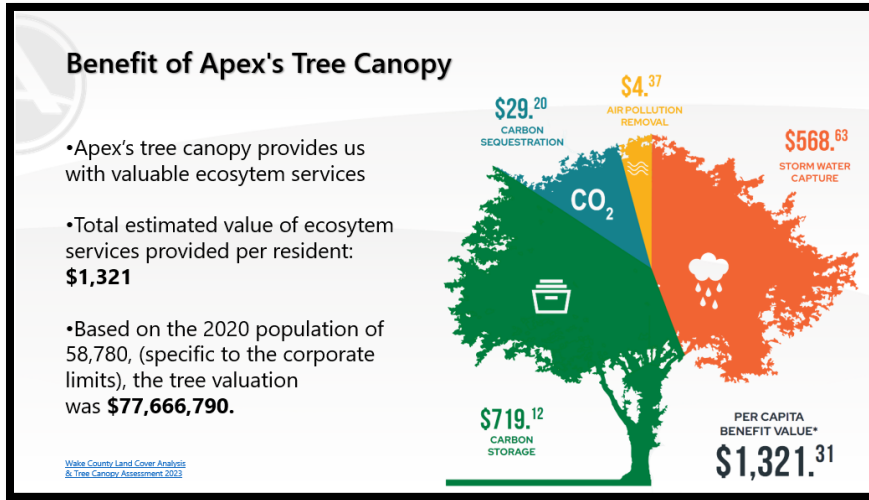


Wake County Tree Canopy Assessment

- From 2010-2020, Apex planning jurisdiction lost **2,180 acres** of tree canopy.
- **15.2% decrease** in total canopy and **9.0% decline** in canopy cover related to overall land cover.
- The tree canopy within Apex is estimated to be worth around **\$131 million dollars**, based on its structural value and annual ecosystem services value.

Wake County Land Cover Analysis & Tree Canopy Assessment 2023

1 **[SLIDE NO. 6]**



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3 **[SLIDE NO. 7]**

Extreme Heat

Based on the 2020 NC Climate Science Report:

- The past decade (2009–2018) and 2019 have been the warmest years on record
- Temperatures are projected to keep rising
- It is likely that future urban growth will increase the magnitude of the urban heat island effect

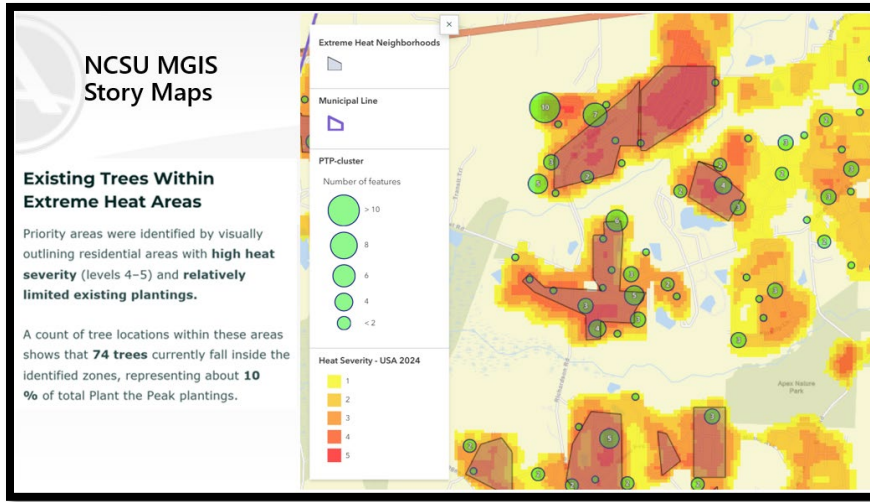
North Carolina Institute for Climate Studies

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5 **[SLIDE NO. 8]**

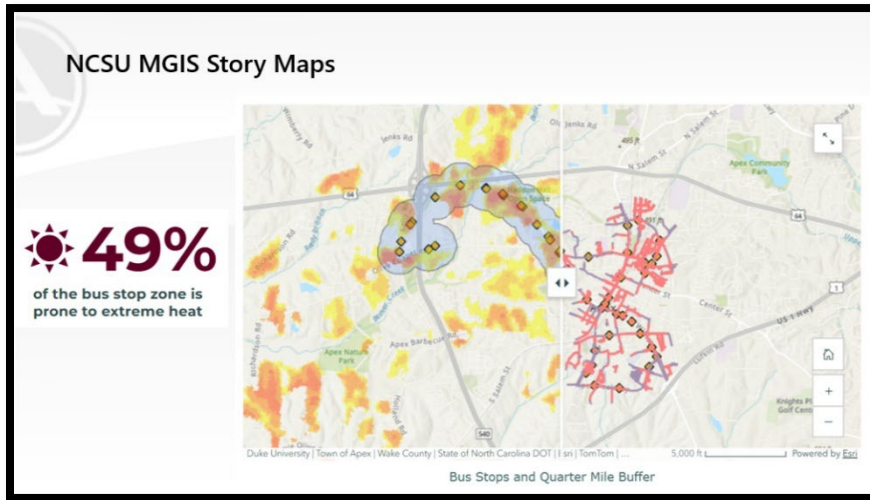
Tree Canopy as Extreme Heat Mitigation

- Apex participated in the NC Climate Office's Planning for Extreme Heat cohort program
- Increasing urban tree canopy is one of the top extreme heat mitigation recommendations to combat urban heat island effect
 - Reduce local air temperatures
 - Reduce surface temperatures
 - Provide shade
 - Reduce energy use and greenhouse gas emissions
- NCSU Master's in GIS partnership

1 **[SLIDE NO. 9]**



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3 **[SLIDE NO. 10]**



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5 **[SLIDE NO. 11]**

Why Tree Canopy Matters


- Improves air & water quality
- Reduces heat island effect
- Enhances property value & aesthetic appeal
- Absorbs carbon dioxide
- Reduces stormwater runoff
- Supports native biodiversity
- Benefits public health

and we know...

6

1 **[SLIDE NO. 12]**

Preserving Tree Canopy is a Community Priority!

-  Tree City & Tree Line USA
-  Game Plan Apex
-  Plant the Peak Program
-  EarthFest 2025 Survey



2
3 **Mr. Venable** presented the recommendations from the Environmental
4 Advisory Board (EAB).

5 **[SLIDE NO. 13]**

Snapshot of Current Town Tree Policies

Category	Requirement
Tree Removal	Permit required for trees >8" caliper (exempts single family/duplexes)
Tree Protection	Fencing requires flagged trees & pre-installation inspection
RCA Eligibility	Undisturbed forested areas, wildlife habitat, riparian buffers, floodplains, wetlands, or newly planted native species (when not enough RCA land is avail.)
RCA Planting when unvegetated (within 50ft ROW)	75% large trees + 25% understory vegetation
RCA Planting when unvegetated (beyond 50ft)	Reforestation plan with 400-700 seedlings/acre
Tree Removal - Aesthetic	NOT allowed inside RCA; tree removal for views only prohibited
Native Species	All landscaping must use native/adaptive species
Parking Lot Shading	35% shading at maturity; no part >40ft from large tree or >20ft from small tree
Replacement Cost	\$20/sq. ft. disturbed area (max \$40,000) OR replace tree ≥8" with ≥8" caliper

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1 **[SLIDE NO. 14]**

Snapshot of Resource Conservation Area (RCA)	
RCA Eligibility	Undisturbed forested areas, wildlife habitat, riparian buffers, floodplains, wetlands, or newly planted native species (when not enough RCA is avail.)
Planned Developments	Determined by Town Council per Sec. 2.3.4.F.1.c & 8.1.2.C.4-10
Small Town Character Overlay	EXEMPT from RCA requirements
Low Density Single-Family (≤2 dwelling units/acre)	EXEMPT from RCA requirements (except for mass grading)
North & East of NC 540 (outside Apex Peakway)	≥20% of gross site acreage
South & West of NC 540 (Single-family/townhome)	≥30% of gross site acreage
South & West of NC 540 (Multi-family/mixed-use/non-res)	≥25% of gross site acreage
Inside Apex Peakway	≥10% of gross site acreage
Mass Grading for Single-family Detached	Additional 5% of gross site acreage

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3 **[SLIDE NO. 15]**



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5 **[SLIDE NO. 16]**



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1 **[SLIDE NO. 17]**

HIGH PRIORITY - Best

1. Establish Champion and Heritage Trees

What:

- Designate trees of exceptional size, age, or cultural value
- Specimen trees: $\geq 24"$ DBH (all species)
- Longleaf pines: protected at $\geq 18"$ DBH
- Require preservation unless no feasible alternative
- Replacement ratio: 2 caliper inches per inch removed

Current Code:
UDO references "specimen trees" as any other tree than a pine $\geq 18"$ caliper (Sec. 8.1.2.B.1.d), only protected within the RCA and Buffers.

Why It Matters

Large-caliper trees provide exponentially greater ecological benefits than young trees, and provides more carbon storage, stormwater interception, shade, and wildlife habitat.

Replacing a 30" oak with several 2.5" saplings does not replicate these services for decades.

Cape Fear Alliance Code & Canopy (Oct. 2025) specifically calls for $\geq 24"$ DBH protections for all species statewide.

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3 **[SLIDE NO. 18]**



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5 **[SLIDE NO. 19]**

HIGH PRIORITY - Best


2. Review Resource Conservation Area Criteria

What: Amend UDO Sec. 8.1.2.B.1.g to prohibit or reduce the credit allowed for impervious private recreation areas (pools, tennis courts, tot lots) counting toward RCA.

Why: RCA's stated purpose is to preserve natural resources and wildlife habitat, but by allowing paved surfaces to count as 50% RCA credit directly undermines this goal.

Current Code: Sec. 8.1.2.B.1.g allows pools, tennis courts, and similar impervious areas on lots ≥ 0.3 acres to count as 50% of RCA requirement.

Fix: Restrict or eliminate impervious surface credit under Sec. 8.1.2.B.1.g. Review all RCA subsections for consistency with conservation purpose.



1 **[SLIDE NO. 20]**


3. Hire Dedicated Urban Forester & Create Apex Urban Forestry Master Plan HIGH PRIORITY - Best

What: Create a dedicated Town position solely focused on tree canopy initiatives. Develop an Urban Forestry Master Plan to guide long-term canopy management.

Why: Cary, Charlotte, Durham, Morrisville, Raleigh, & Wake Forest all have dedicated urban forestry staff. Without unified leadership, tree regulations are spread across multiple departments with no single accountable point.

Code Gap: No dedicated position currently exists. Reviews are performed by Planners/ZCOs as part of broader duties (UDO Sec. 2.1.6.A.1.i).

Fix: Amend UDO to formally establish a Chief Urban Forester role with defined authority over Secs. 8.1 & 8.2, tree inventory, and an Apex Tree Manual.



2
3 **[SLIDE NO. 21]**

3. Example Chief Urban Forester Job Duties

1. To administer and enforce the provisions of Sections 8.1.2 *Resource Conservation*, and 8.2.1 *Landscaping, Buffering, and Screening*.
2. To lead and supervise tree regulation review, enforcement, and compliance.
3. To lead Town-wide and department urban forestry goals and initiatives.
4. To interpret and translate information to the public on regulatory processes, planning initiatives, and land use policies related to urban forestry and tree canopy.
5. Prepare and make available to the public an Apex Tree Manual which includes guidelines for compliance with the UDO.
6. To conduct a town-wide tree inventory to document tree health, size, species, and canopy spread to inform preservation decisions.
7. To designate appropriate other person(s) who shall carry out the powers and duties of the Chief Urban Forester.

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5 **[SLIDE NO. 22]**

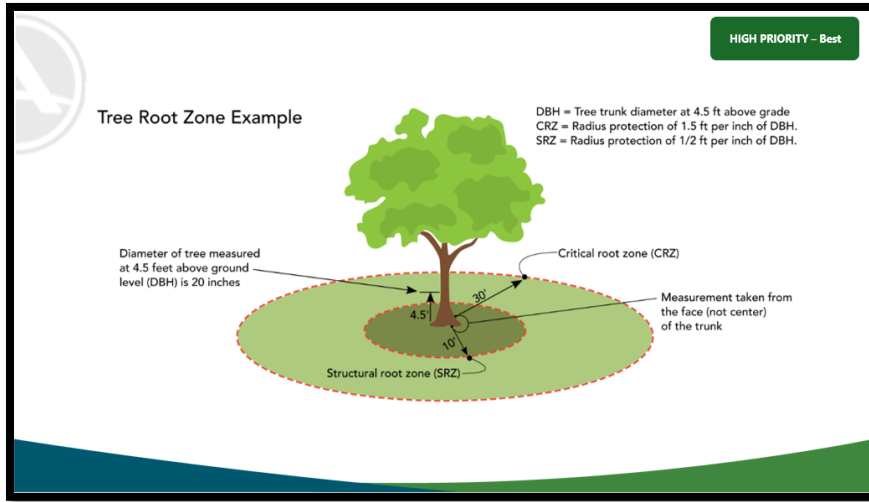
4. Protect Critical Root Zone HIGH PRIORITY - Best

Recommendation: Update the Critical Root Zone (CRZ) definition to include all trees, including those under 8 inches Diameter at Breast Height (DBH) and standalone trees outside of save areas.

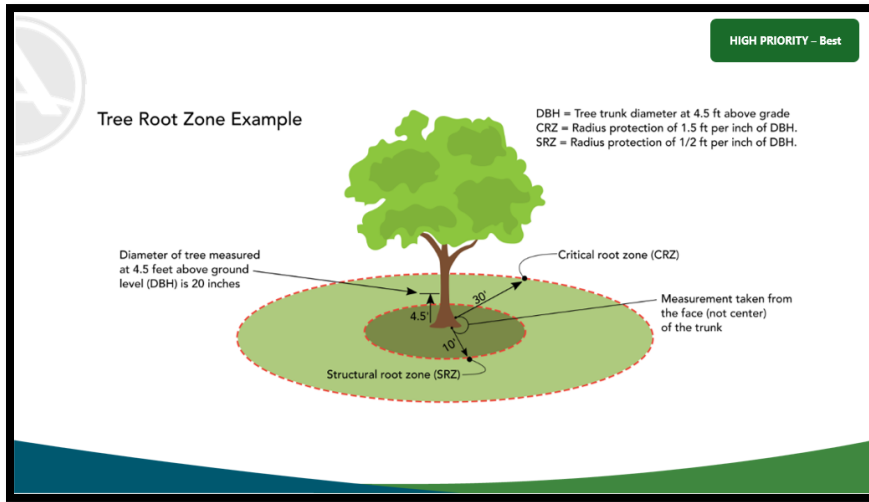
Why?

1. **Protects Tree Health and Longevity**
The CRZ contains the majority of a tree's fine roots, which absorb water and nutrients. Disturbance, such as grading, compaction, or trenching, within this area can significantly stress or kill the tree.
2. **Prevents Soil Compaction**
Construction activities (equipment, stockpiling, foot traffic) compact soil within the CRZ, reducing oxygen availability to roots. This can lead to root suffocation and decline over time, even if damage isn't immediately visible.
3. **Maintains Structural Stability**
Roots within the CRZ anchor the tree. Disturbing them can increase the risk of tree failure, especially during storms, creating safety hazards for people and property.

1 **[SLIDE NO. 23]**



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3 **[SLIDE NO. 24]**



4
5 **[SLIDE NO. 25]**

Medium Priority Recommendations

"Better"

Recommendations 6 – 10

Mitigation Fund • Species Diversity • Preservation
Incentives • Partnerships

The slide features a background image of a wooden boardwalk winding through a dense forest. The text is centered and uses a mix of bold and regular fonts to highlight the title and recommendations.

1 **[SLIDE NO. 26]**

6. Tree Mitigation Fund MEDIUM PRIORITY – Better

What:

- Create a dedicated Tree Mitigation Fund (modeled on Charlotte's program). Require contractors and site supervisors to complete tree preservation training.

Why:

- A Tree Mitigation Fund provides dedicated funding to replace lost trees, expand canopy, and support staffing and expertise in Urban Forestry and Arboriculture. It advances proactive urban forest management.

Example:

- Charlotte's ordinance allows for payment in lieu of protecting trees on site in certain development situations. Payments fund:
 - Tree Canopy Preservation Program (land acquisition)
 - Tree Canopy Care Fund (private tree planting and maintenance)
 - Street Tree Planting Fund



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3 **[SLIDE NO. 27]**

6. Code and Canopy Example Language: MEDIUM PRIORITY – Better

Example:

"Mitigation funds collected under this ordinance shall be deposited into a dedicated Tree Mitigation Fund, exclusively dedicated to urban forestry initiatives within the City/County, including: tree planting, replacement, and establishment programs; maintenance, care, and preservation of existing public trees; urban tree canopy assessments and management planning; acquisition or conservation easements of land specifically for the purpose of tree preservation; and educational programs, community outreach, and administrative costs directly associated with urban forestry efforts.

The City/County shall publicly report the status of the Tree Mitigation Fund as part of the annual budgeting process and make it available for public review and comment. Reports shall clearly detail: total funds received (including date, amount, and source of all mitigation payments); detailed expenditures (including project descriptions, locations, amounts spent, and dates); fund balance; budget forecasts outlining anticipated income and planned expenditures." "Unauthorized removal of protected trees shall incur mitigation fees at double the standard rate. Repeat violations trigger stop-work orders."

- Code and Canopy

4
5 **[SLIDE NO. 28]**

7. Landscape Standards for New Development MEDIUM PRIORITY – Better

≥75% Native species required in all landscape plans	≤25% Max per species or cultivar (diversity mandate)	600 cu ft Minimum soil volume for large canopy trees
---------------------------------------------------------------	----------------------------------------------------------------	----------------------------------------------------------------

Why: Monocultures are vulnerable to pests and disease (e.g., Emerald Ash Borer). Diversity mandates build resilience. Adequate soil volume is critical for large trees to reach full health. Trees planted in insufficient soil may fail prematurely.

Current Code: UDO Sec. 8.2.2.B.1 requires native/adaptive species but sets no percentage thresholds, per-species diversity limits, or soil volume minimums.

Fix: Amend UDO Sec. 8.2.2 to add ≥75% native threshold, ≤25% per-species diversity limit, and minimum soil volume standards.

1 **[SLIDE NO. 29]**

7. Code and Canopy Example Language:

Soil Quality & Volume: "Each large canopy tree shall be provided a minimum of 600 cubic feet of non-compacted soil at least 3 feet deep. Tree planting sites must be excavated to remove construction debris and backfilled with amended soil consistent with ANSI A300 standards. Soils shall meet a minimum infiltration rate of 0.5 inches per hour, and compaction shall not exceed 85% Proctor density unless structural soil or suspended pavement systems are used."

Selection & Diversity: "At least 75% of all trees, shrubs, and herbaceous plants in any required landscape plan shall be native to the southeastern U.S. or naturalized species proven to support local ecosystems. Sites planting more than 20 trees must also meet species diversity requirements. Up to 25% of required plant material may be non-native but non-invasive, subject to staff approval. Any planting list with more than 25% non-native species must include written justification and a mitigation strategy, such as supplemental native plantings, pollinator habitat, or wildlife-supportive design features. Developments that exceed the 75% native requirement —particularly those planting 100% native species—may qualify for reduced buffer widths, expedited review, or landscape credit bonuses."

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3 **[SLIDE NO. 30]**

8. Incentivize Preservation / Flexible Standards MEDIUM PRIORITY – Better

What: Grant density incentives (bonus dwelling units) for projects preserving $\geq 25\%$ * of existing canopy. Allow dimensional reductions (setbacks, lot coverage) for projects exceeding canopy standards by $\geq 25\%$.

*For Apex the percentages may be dependent on general location to align with the UDO's current RCA and Open Space requirements in Section 8.1.2

Why: Positive incentives can be more effective than penalties in encouraging developers to integrate tree preservation into designs from the outset. The Cape Fear Alliance Code & Canopy guide highlights incentive-based preservation, which include flexible density provisions as proven tools for slowing canopy loss.

Current Code: UDO Sec. 8.2.2.C.ii allows a 5–20% reduction in required parking to preserve existing healthy trees. No broader density bonuses or dimensional reductions for canopy preservation are currently established.

Fix: Amend the UDO to create a formal canopy preservation incentive program with defined thresholds for density and/or dimensional flexibility.

4
5 **[SLIDE NO. 31]**

8. Code and Canopy Example Language: MEDIUM PRIORITY – Better

Example:

"Modifications to dimensional or design requirements (e.g., setbacks, lot coverage, or height limits) may be granted to projects that preserve at least 25% of the total site as undisturbed greenspace, inclusive of mature tree stands, native vegetation, and natural hydrologic features."

" Projects preserving 25% or more of existing on-site tree canopy may qualify for increased Floor Area Ratio (FAR), reduced impervious surface thresholds, or bonus dwelling units in designated high-density zoning districts."

- Code and Canopy

1 **[SLIDE NO. 32]**

9. Require Resource Management Plans MEDIUM PRIORITY – Better

What:

- Require Resource Management Plans (RMPs) for projects over 2 acres, including early-stage professional tree inventories and surveys certified by a licensed arborist, urban forester, or landscape architect.

Why:

- To ensure existing trees are accurately identified and protected early in the design process, improving preservation outcomes and reducing avoidable canopy loss.

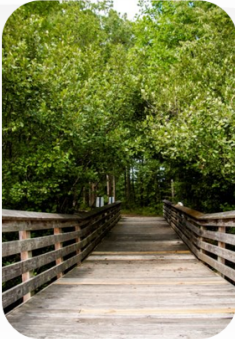


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3 **[SLIDE NO. 33]**

9. Code and Canopy Example Language: MEDIUM PRIORITY – Better

Example:

"Development projects ≥ 1 acre shall submit a Resource Management Plan (RMP) with their initial application. The RMP must inventory all trees ≥ 8 " DBH, identify significant or native trees, and outline preservation strategies. Plans must demonstrate how tree protection was considered before site layout. No grading permit shall be issued without an approved RMP."
- Code and Canopy



4
5 **[SLIDE NO. 34]**


10. Mandate Alternative Routing Analyses (Utilities) MEDIUM PRIORITY – Better

What:

- Require routing analyses for essential services impacting protected trees and mandate coordination with Urban Forestry staff during preliminary planning to minimize canopy loss.

Why:

- To ensure adequate space is identified and protected early in the planning process, allowing for successful tree planting and long-term canopy establishment.



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1 **[SLIDE NO. 35]**

MEDIUM PRIORITY - Better


10. Code and Canopy Example Language:

Example:

"All development or infrastructure proposals involving essential services shall submit an Alternative Routing Analysis. No route disturbing the critical root zone of a protected tree may be approved unless the applicant demonstrates, in writing, that all reasonable alternatives were explored and found infeasible. City and County agencies shall coordinate with urban forestry staff during early planning to identify tree protection opportunities. Projects that avoid canopy impacts may qualify for reduced mitigation requirements."

"Integrate Tree Protection into Preliminary Planning "All public infrastructure and utility projects shall coordinate with the Urban Forestry Division or Sustainability Office during the preliminary planning phase. Tree preservation considerations must be documented in master planning documents and GIS-based siting. Plans shall show efforts to avoid tree impacts and identify significant canopy, critical root zones, and other sensitive areas prior to technical review. Infrastructure projects that lack early coordination and avoidance shall not be deemed complete for submittal."

- Code and Canopy



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3 **[SLIDE NO. 36]**

Priority	Policy & Programmatic Goals
High "Best"	1. Define and Protect "Heritage" and "Champion" Trees
	2. Review Existing RCA Criteria
	3. Hire a Dedicated Urban Forester Position
	4. Codify Critical Root Zone (CRZ) Protection
	5. Standardize Policies for Town Landscaping
Medium "Better"	6. Tree Mitigation Fund
	7. Landscape Standards for New Development
	8. Incentivize Preservation / Flexible Standards
	9. Require Resource Management Plans
	10. Mandate Alternative Routing Analyses (Utilities)

4
5 **[SLIDE NO. 37]**

Questions for us?

Next Steps

- Council feedback?
- Staff initiates UDO amendment process with stakeholder review for priority recommendations
- EAB continues coordination with Trees for the Triangle, Arbor Day Foundation, and Triangle Land Conservancy



1 **[SLIDE NO. 38]**



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3 **[SLIDE NO. 39]**



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6 **Councilmember Zegerman** asked about the implications for a property owner
7 if a heritage or champion tree is located on private property.

8 **Mr. Venable** said that when a heritage or champion tree is located on a single-
9 family residential property, there is generally little the Town can do to require its
10 preservation. He explained that, for example, if a property owner requests that a tree
11 be recognized as a heritage or champion tree and subsequently sells the property,
12 the new owner could remove the tree without Town intervention. He noted that,
13 based on his experience in another jurisdiction, a significant cultural tree was
14 protected through a zoning condition, and suggested that there may be situations
15 where zoning conditions are a more appropriate tool than amendments to the Unified
16 Development Ordinance (UDO).

1 **Mayor Pro-Tempore Mahaffey** said that the presentation referenced
2 incentives for preserving trees but did not include stronger preservation
3 requirements or goals. He asked whether mandatory tree preservation measures had
4 been evaluated or whether such requirements were not legally feasible.

5 **Mr. Venable** said this topic was part of the feedback received from Council
6 and that staff could work with the Environmental Advisory Board (EAB) to develop
7 recommendations regarding preservation percentages or varying levels of tree
8 canopy protection. He noted that the EAB could also provide best practices and
9 comparisons from other jurisdictions.

10 **Ms. Bunce** said it would be helpful for staff to better understand what Council
11 means by "barry" and encouraged Council to keep in mind that Resource
12 Conservation Areas (RCAs) are generally undisturbed areas that already contain tree
13 canopy. She noted that the EAB had provided recommendations regarding what
14 should not qualify toward RCA canopy requirements and stated that staff would
15 appreciate general guidance from Council unless Council preferred that staff first
16 seek input from stakeholders.

17 **Mayor Pro-Tempore Mahaffey** asked whether staff had identified other
18 municipalities with regulations specifically addressing tree canopy preservation.

19 **Mr. Venable** said that examples do exist and could be provided to Council,
20 citing the City of Durham as one example.

21 **Councilmember Zegerman** stated that bringing examples from other
22 jurisdictions back to Council would be beneficial for further discussion.

23 **Councilmember Gray** said it would be helpful to understand the feasibility of
24 tree preservation requirements in situations where developments are located closer
25 to roadways. He also asked whether compensation or fees related to the value of
26 timber removed during development projects, particularly where extensive clear-
27 cutting occurs, could be explored.

28 **Mr. Venable** stated that staff would need to consult with legal counsel
29 regarding those considerations.

30 **Councilmember Zegerman** said that the Town does not currently appear to
31 have the legal authority to impose an additional development fee related to tree
32 removal but suggested that the issue could be further investigated.

33 **Mayor Pro-Tempore Mahaffey** said that a fee could potentially apply in
34 situations where required tree canopy preservation standards cannot be met.

35 **Councilmember Gray** stated that additional development-related fees may be
36 worth exploring, particularly given declining cost recovery over time, and expressed
37 interest in identifying opportunities where fees could be increased for developments
38 with significant tree removal impacts.

1 **Councilmember Reese** said that not all trees provide the same value and
2 asked whether native species replanting requirements should include more specific
3 standards regarding the types and diversity of trees to be planted.

4 **Mr. Venable** explained that the Design and Development Manual is currently
5 being updated and includes a list of native tree species. He noted that additional
6 detail could be incorporated to identify specific tree species that may warrant greater
7 preservation effort.

8 **Councilmember Reese** stated that he would support that approach and asked
9 staff to explore whether Utilities could coordinate with the Urban Forestry initiative to
10 identify tree-planting opportunities within established neighborhoods in the town
11 core.

12 **Mr. Venable** said that the proposed Urban Forestry staff position would be
13 responsible for analyzing areas within the town core that would benefit from
14 additional tree planting to help reduce the urban heat island effect. He added that the
15 position would also coordinate implementation of the Town's tree policies across
16 departments and ensure consistent application of those policies by staff.

17 **Councilmember Zegerman** said that, in principle, the proposed ideas were
18 positive and expressed interest in reviewing rough percentages of existing
19 development conditions to help determine appropriate and potentially more
20 aggressive tree preservation requirements. He also asked whether it would be
21 feasible to establish a small municipal nursery to expand the Town's tree program by
22 growing its own trees rather than purchasing them, potentially reducing costs. In
23 addition, he suggested exploring opportunities within existing rights-of-way to
24 require developers to plant additional streetscape trees to increase shade and
25 improve walkability, particularly in areas identified as heat zones.

26 **Mr. Venable** said those concepts had been discussed but noted there can be
27 challenges related to utility infrastructure and roadway restrictions. He summarized
28 Council's priorities as including more aggressive tree canopy preservation standards,
29 evaluation of approaches related to significant tree clearing during development,
30 research into the feasibility of fees or other funding sources tied to tree loss or
31 preservation, exploration of a potential municipal tree nursery program, identification
32 of opportunities to expand street tree planting and urban forestry efforts throughout
33 the community, and continued discussions with stakeholders to assess
34 implementation options and challenges.

35 **Councilmember Mu** suggested researching whether allowing developers to
36 build larger homes on fewer lots could preserve more trees by reducing the overall
37 number of homes constructed.

1 **Mr. Venable** said that such concepts could fall under incentive-based flexibility
2 standards, such as allowing increased building height or reduced minimum lot sizes,
3 and could continue to be explored if Council wished to pursue those types of
4 incentives.

5 **Mayor Pro-Tempore Mahaffey** asked how many applications had been
6 received for the Plan the Peak program this year and how many trees were available
7 for distribution.

8 **Ms. Skinner** stated that approximately 234 applications had been received
9 and that about 210 trees were distributed through the program.

10 **Councilmember Reese** recommended researching appropriate native tree
11 species based on root structure and site conditions and suggested coordinating with
12 NC State University or other universities to identify suitable fast-growing tree species
13 and their availability. He also asked about the level of coordination among volunteer
14 organizations and nonprofit partners and whether those efforts could be streamlined.

15 **Ms. Skinner** stated that coordination among partner organizations could be
16 strengthened in the future. She noted that the Environmental Advisory Board has
17 been serving as the Town's Tree City Board and that a Tree City Subcommittee
18 consisting of three members had recently been established to help coordinate
19 organizational efforts and events such as Arbor Day.

20 **Mayor Gilbert** thanked staff for the comprehensive presentation.

21 **Mr. Venable** stated that discussions with stakeholders would continue as the
22 proposed initiatives move forward.

23

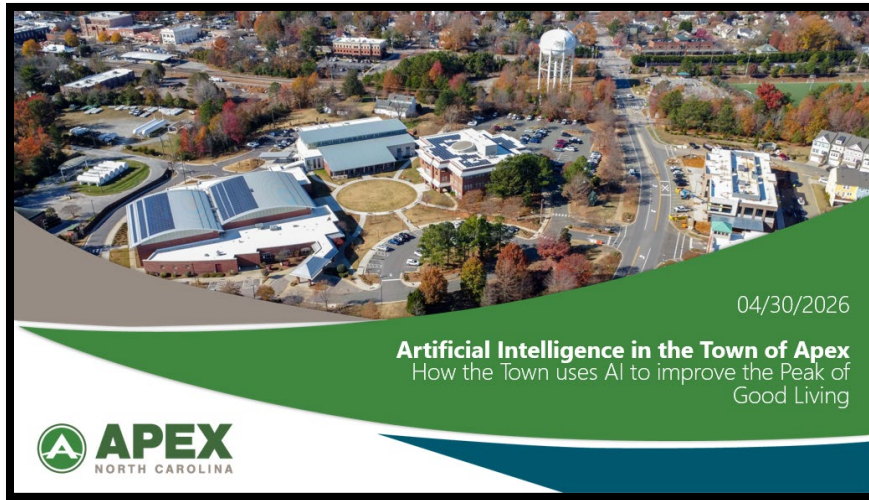
24 **[ARTIFICIAL INTELLIGENCE IN THE TOWN OF APEX]**

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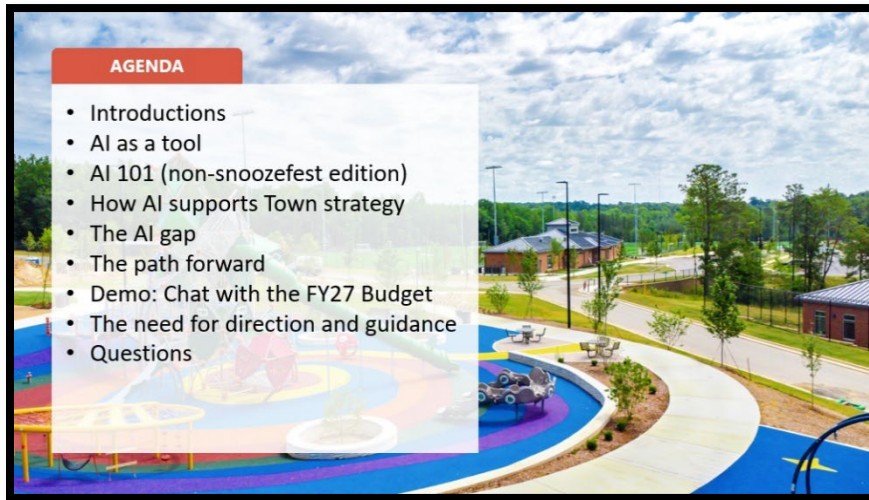
26 **Innovations Consultant I, Connor McKinnis** provided an overview of the
27 Town's Information Technology Security and Innovations Division and discussed
28 artificial intelligence (AI), including how it works and its potential applications, as part
29 of the presentation.

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1 **[SLIDE NO. 1]**



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3 **[SLIDE NO. 2]**



4
5 **[SLIDE NO. 3]**



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1 **[SLIDE NO. 4]**



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3 **[SLIDE NO. 5]**



4
5 **[SLIDE NO. 6]**

AI as a Tool

- Tools are **means, not ends**, to deliver excellent, reliable, and equitable services.
- **Heavily reliant on human judgement**
- Critical tool for several established priorities:
 - Smart Cities leadership
 - Community Readiness Plan – AI Driver of Change
 - Traffic & mobility
 - Resident experience

6

1 **[SLIDE NO. 7]**

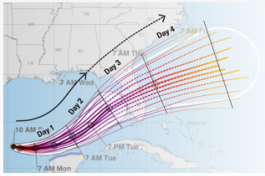


2
3 **[SLIDE NO. 8]**


What is AI?

- '...the ability of a digital computer or computer-controlled robot to perform tasks commonly associated with intelligent beings'
- **Machine learning** uses vast data to train AI to perform tasks


Predictive AI



Generative AI



polimorphic

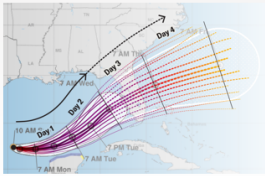


4
5 **[SLIDE NO. 9]**


What is AI?

- '...the ability of a digital computer or computer-controlled robot to perform tasks commonly associated with intelligent beings'
- **Machine learning** uses vast data to train AI to perform tasks


Predictive AI



Generative AI



polimorphic



6

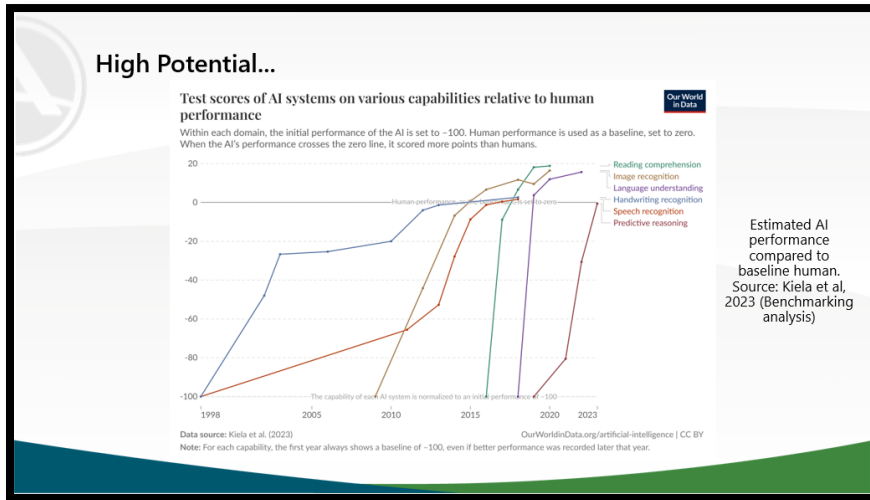
1 **[SLIDE NO. 10]**

Strengths and Weaknesses

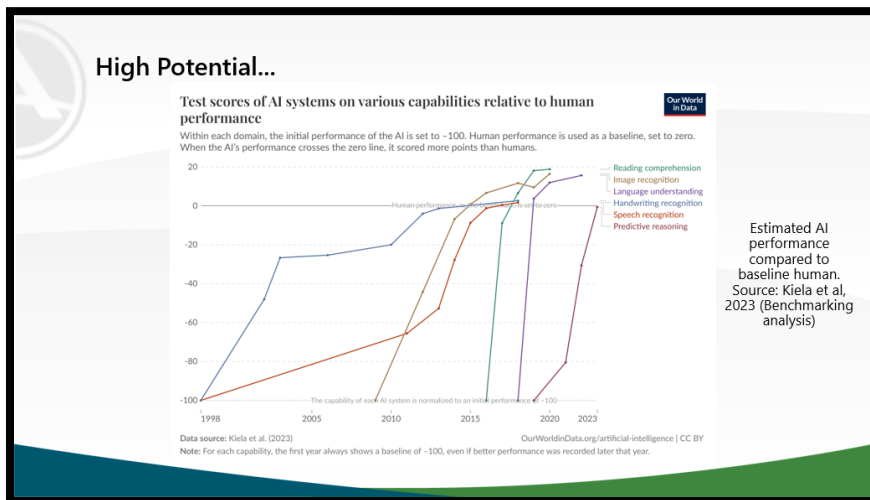
- Faster data processing
- Handles low-interest tasks
- More flexible than traditional automations
- Can be confidently wrong (hallucination)
- Mirrors its training data (bias)
- Induces over-reliance

Case	Court / Jurisdiction	Date	Party Using AI	AI Tool	Nature of Hallucination	Outcome / Sanction
Meyer v. Castroville State Bank	CA Texas (4th Dist.) (USA)	22 April 2026	Pro Se Litigant	Implied	Fabricated Case Law (2)	
Alshia Monique Jones v. Ahmed Taylor et al.	E.D. Michigan (USA)	22 April 2026	Pro Se Litigant	Implied	Fabricated Case Law (2)	Warning
Krista C. Geddes v. LoanCare, LLC et al.	E.D. California (USA)	22 April 2026	Lawyer	Implied	False Quotes Case Law (2)	Monetary Sanction; Bar Referral
Carol L. Williams v. Traveo Global	CA Oregon (USA)	22 April 2026	Lawyer	Unidentified	Fabricated Case Law (1) False Quotes Case Law (1) Misrepresented Case Law (3)	Brief Struck; Adverse Costs Order

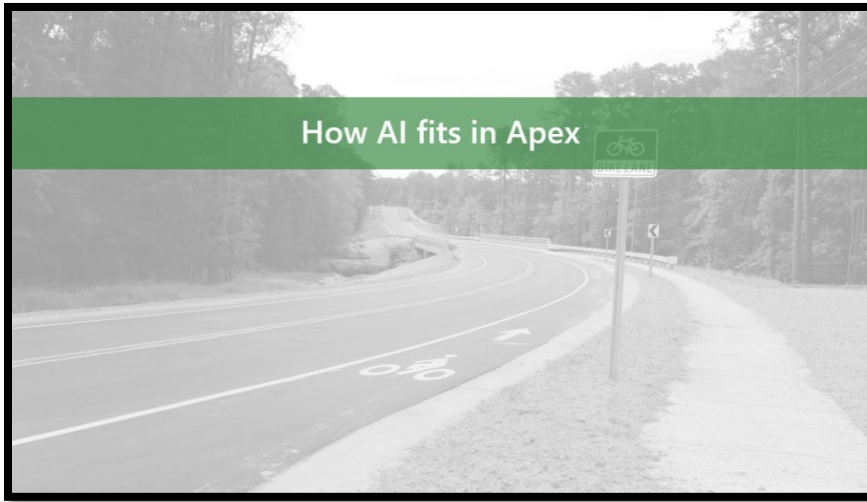
2
3 **[SLIDE NO. 11]**



4
5 **[SLIDE NO. 12]**



1 **[SLIDE NO. 13]**



2
3 **[SLIDE NO. 14]**

How AI fits in Apex

AI is used to enhance staff capabilities, not replace or supplant human expertise.

- Supporting decision-making with research and analysis tools
- Raising alerts on subtle patterns in complex data
- Automating tedious-but-necessary tasks
- Increasing personalization in learning

4
5 **[SLIDE NO. 15]**

Where AI Already Supports Strategic Goals

- Smart Cities
 - Facility occupancy pilot
 - Parking availability pilot
- Traffic & Mobility
 - Real-time traffic modeling pilot
- Operational Efficacy
 - Feedback aggregation and analysis
 - Records search tools
 - Pavement condition analysis
 - In-house software development

Occupancy (%)

	Mo	Tu	We	Th	Fr	Sa	Su
00:00	5	21	6.2	4.1	4.7	4.1	4.1
	5.6	23	9.2	1.5	5	4.7	4.3
	5.3	19	9.2	1.3	4.8	5.5	4.3
03:00	5.3	35	9.1	3.1	4.6	4.8	3.9
	4.9	4.9	9	5.1	4.6	4.2	4.1
	5.3	5.5	9.3	5.1	4	4.6	4.3
06:00	6	11.3	11.1	8.4	6.1	6	5.7
	10.3	13.6	14.7	13.7	10.9	16.5	9.1
	35.5	33.1	39.8	25.1	33.1	28.5	14.7
09:00	55.1	51.4	58.2	42.8	50.9	34.4	21.7
	64.3	49.7	60	52.8	61	40.5	33.2
	62.1	50.4	51	55.2	58.5	40.5	30.3
12:00	59.2	48.6	51.9	58.1	55.4	33.9	27.6
	58.6	50.3	51.5	54.7	54.8	32.5	22.5
	58.1	45.2	45.9	49.2	47.9	33.2	22.4
15:00	51.8	45	39.6	47.9	39.4	26	21
	38.8	40.9	38.3	45	37.7	26.8	19.6
	27.2	34.5	27.6	34.6	28.8	24.9	20.7
18:00	25.9	28.6	29.2	30.9	30.9	24.1	24.2
	23.1	25.5	27.6	28.6	28.8	22.5	22.6
21:00	9.8	14.2	18.1	16.8	21.4	16.4	11.9
	5.9	7.8	8.3	8.9	11.8	9.2	7.3
	4.8	4.8	4.8	4.7	5.3	5.8	5.3
	3.2	5	4.7	4.7	5.2	5.5	4.7

Recent parking occupancy data from Parquery

6

1 **[SLIDE NO. 16]**

Where AI Already Supports Strategic Goals (Cont'd)

- Resident Experience
 - Conversational AI with website info
- Infrastructure & Safety
 - Crowd counting & density tools
- Regional Leadership
 - GovAI Coalition membership

You can play pickleball at several locations in Apex:

- **Apex Community Park:** Outdoor, 3 courts with lights
- **Apex Elementary School:** Outdoor, 4 courts with lights (available only on weekends and after 6 pm on school days)
- **John M. Brown Community Center:** Indoor, 4 courts with lights (available only for ages 55+, during designated open gym hours)
- **Kelly Road Park:** Outdoor, 4 courts with lights (also used for Junior Tennis)
- **Pleasant Park:** Outdoor, 6 courts (open sunrise to 30 minutes after sunset)
- **Seymour Athletic Fields at Apex Nature Park:** Outdoor, 4 courts with lights (also used for Junior Tennis)

For more details, you can visit the [Pickleball page](#) on the Apex official website.

View Sources: ▾

Apex chatbot (provided by Polimorphic) available on parts of the Town website

2
3 **[SLIDE NO. 17]**



4
5 **[SLIDE NO. 18]**

The Gap: Pilots and Perspective

- Current projects are pilot-level, IT-based, and limited in organizational buy-in.
- Risks for staying in pilot-mode:
 - Inconsistent tool adoption
 - Shadow AI proliferation
 - No data coordination or governance
- Scaling AI usage responsibly requires organizational leadership, direction, and investment.

Microsoft Copilot (premium license)

What's on my schedule for Wednesday?

Copilot

You have 4 meetings scheduled for Wednesday: 1, 2, 3, 4

Your Wednesday Schedule

1. Midweek / Projects / Updates
 - Time: 10:00 AM - 12:30 AM
 - Organizer: Conrad Sun

Search Questions by Day

Recent Polimorphic chatbot stats

1 **[SLIDE NO. 19]**



2
3 **[SLIDE NO. 20]**

The Path Forward

- Structured innovation capacity
 - "Labs"
- AI governance and training
 - IT Policy
 - Already leading the region in all-staff AI training
- Expanded use-cases
 - Traffic optimization, Town-wide occupancy insights, etc

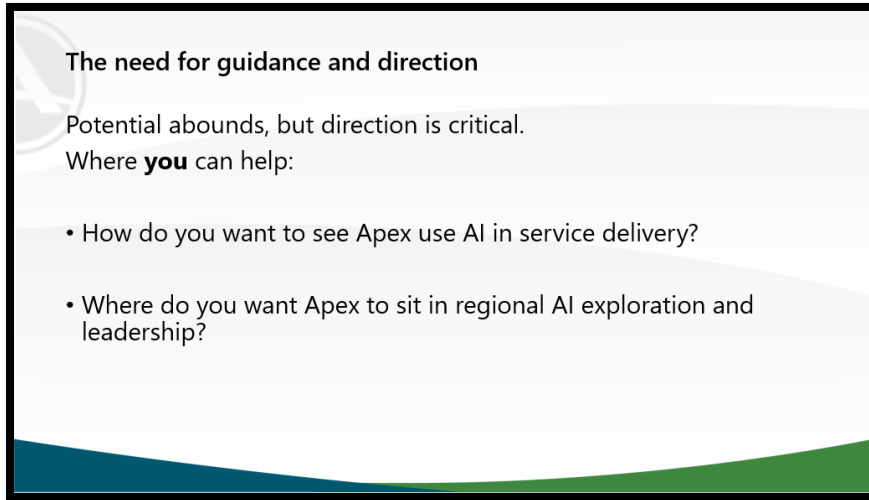
All plans are based on our current understanding of our goals for Apex's posture for AI use and regional leadership.

4
5 **[SLIDE NO. 21]**

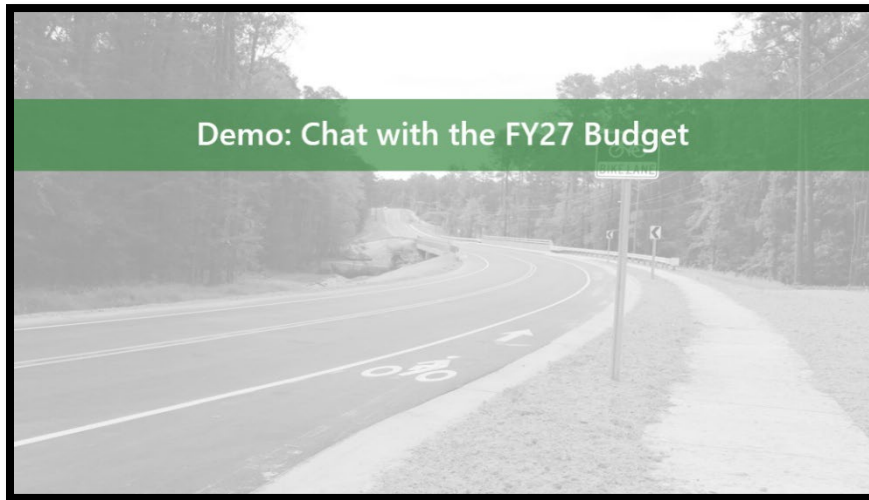


6

1 **[SLIDE NO. 22]**



2
3 **[SLIDE NO. 23]**



4
5 **Councilmember Gray** said he supported leveraging technology to reduce
6 labor-intensive tasks and improve efficiency. He noted that AI could help reduce
7 staffing demands for certain functions without overburdening remaining staff.

8 **Councilmember Reese** said discussions should prioritize resident privacy first,
9 followed by Town security and system vulnerabilities. He referenced a reported
10 incident involving Claude as an example of the potential risks associated with AI
11 technology.

12 **Councilmember Mu** said AI could be beneficial in assisting with public
13 records requests by allowing residents to search the Town's public records database,
14 potentially reducing staff time required to respond to requests. She also suggested AI
15 could enhance customer service tools such as Ask Apex and referenced examples like

1 reporting potholes or using Amazon's chatbot for customer support. She emphasized
2 the importance of protecting resident privacy.

3 **Mr. McKinnis** said the capabilities of chatbots are significant and noted that
4 the Town is already using AI through Ask Apex with its Polymorphic platform. He
5 explained that the current version assists with answering questions and directing
6 residents to services, while future enhancements could allow the chatbot to complete
7 tasks such as scheduling bulk trash collection. He emphasized that the goal is not to
8 replace staff but to free employees to focus on more complex requests requiring
9 greater time and attention.

10 **Councilmember Mu** said that while early chatbots were often frustrating to
11 use, the technology has improved significantly.

12 **Mr. McKinnis** provided additional context regarding the referenced Claude
13 security incident, explaining that the system had been instructed to delete code and
14 backups, resulting in the loss of data. He emphasized that security remains a high
15 priority, both in protecting against external cyber threats and mitigating risks
16 associated with human error or inappropriate instructions provided to AI systems.

17 **Mayor Gilbert** asked whether the Town has department-specific policies
18 governing the use of AI, expressing concern about the potential misuse of AI by
19 employees, including law enforcement personnel, and how such situations would be
20 addressed.

21 **Town Manager Vosburg** said staff would need to verify whether department-
22 specific AI policies currently exist.

23 **Mr. McKinnis** said that certain aspects of AI use are already addressed through
24 the Town's existing Information Technology policy governing employee use of data
25 and technology, which all employees are required to acknowledge. He added that
26 the current AI pilot programs do not involve sensitive data and stated that staff would
27 not expand AI use involving sensitive information until an appropriate policy
28 framework is established.

29 **Mayor Pro-Tempore Mahaffey** said the range of opportunities presented by
30 AI is extensive and expressed support for identifying practical applications that
31 improve efficiency. He noted that some existing software solutions are expensive and
32 inefficient and suggested that internally developed applications could provide more
33 cost-effective alternatives. He encouraged staff to identify software needs that could
34 make employees' jobs easier and improve operational efficiency across the
35 organization. While expressing some skepticism toward chatbots, he acknowledged
36 that the technology continues to evolve and voiced support for an IT team with
37 technical AI expertise focused on implementation and innovation rather than policy
38 development.

1 **Mr. McKinnis** said the primary consideration is determining which priorities
2 should be the focus, whether that involves reducing reliance on expensive software or
3 maximizing the capabilities of software already purchased by the Town. He noted that
4 many products are specifically designed for local governments but may not be fully
5 utilized. He also discussed the potential for a centralized feedback collection and
6 survey tool that would allow Apex to more efficiently gather resident input, rather
7 than relying on multiple paid platforms such as SurveyMonkey. He provided examples
8 of how data could be collected and explained that these tools could be implemented
9 without exposing data to third parties or retaining images from public events beyond
10 a brief period of time. He stated that the opportunities exist, but the Town's priorities
11 and focus areas should guide implementation.

12 **Councilmember Reese** said that, consistent with the Town's small-town
13 character, public-facing services should remain human-centered whenever possible,
14 with AI serving as a tool to support staff rather than replace direct customer service
15 interactions.

16 **Mr. McKinnis** stated that the overall consensus is that AI is intended to assist
17 employees and improve efficiency, not replace personnel.

18 **Town Manager Randy Vosburg** asked staff to provide a recap of the
19 discussion and Council's feedback.

20 **Director Sacco** recapped from the discussions, including prioritizing resident
21 privacy and security, using AI tools to supplement services but not replace human
22 customer service, maintaining the town's small-town character, improving operational
23 efficiency through responsible AI use, and ensuring transparency when AI-generated
24 content is used. She said these points would be incorporated into future policy
25 development and asked whether any additional considerations had been missed.

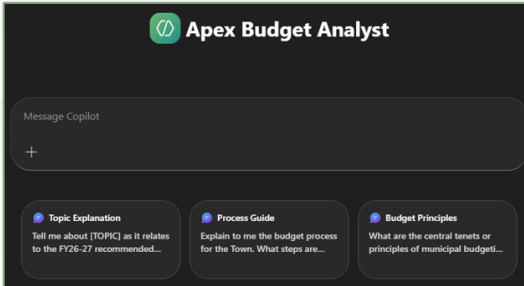
26 **Councilmember Mu** said that with the chatbot the option to talk with a live
27 agent should always be given.

28 **Director Sacco** gave an example of when using chatbot was helpful to get a
29 new driver's license.

1 **[SLIDE NO. 24]**


Demo: Chat with the FY27 Budget

- Several options for AI 'provider'
 - Copilot
 - ChatGPT
 - Google (Gemini, NotebookLM)
 - Self-Hosted
- Many documents provide context
 - Past budgets
 - Planning documents
 - State and local policy
- Personal and organizational preferences



2
3 **[SLIDE NO. 25]**

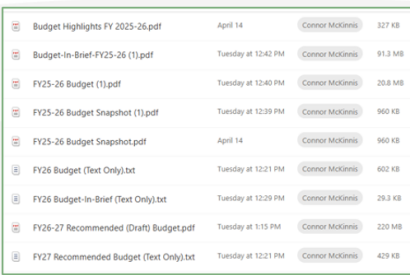
Demo: Chat with the FY27 Budget



4
5 **[SLIDE NO. 26]**

Demo: Chat with the FY27 Budget

- AI assisting, not deciding
- Questions for the AI
 - What are the economic factors affecting the property tax rate?
 - What are the changes in the FY27 recommended budget compared to FY26?
- Discussion
 - What situations are AI-compatible?
 - What situations are NOT AI-compatible?
 - What are the limitations with AI for documents? Just intelligence, or more?
 - What can self-hosted or custom-trained AI systems do?



Budget Highlights FY 2025-26.pdf	April 14	Connor McKinnis	327 KB
Budget-In-Brief-FY25-26 (1).pdf	Tuesday at 12:42 PM	Connor McKinnis	91.3 MB
FY25-26 Budget (1).pdf	Tuesday at 12:40 PM	Connor McKinnis	20.8 MB
FY25-26 Budget Snapshot (1).pdf	Tuesday at 12:39 PM	Connor McKinnis	960 KB
FY25-26 Budget Snapshot.pdf	April 14	Connor McKinnis	960 KB
FY26 Budget (Text Only).txt	Tuesday at 12:21 PM	Connor McKinnis	602 KB
FY26 Budget-In-Brief (Text Only).txt	Tuesday at 12:29 PM	Connor McKinnis	29.3 KB
FY26-27 Recommended (Draft) Budget.pdf	Tuesday at 1:15 PM	Connor McKinnis	220 MB
FY27 Recommended Budget (Text Only).txt	Tuesday at 12:21 PM	Connor McKinnis	429 KB

1 **[SLIDE NO. 27]**



2

3

4

5 **[NAMING PRACTICES DISCUSSION]**

6

7 **Mayor Gilbert** said he believed Town Manager Vosburg had previously
8 distributed the naming policy but would resend it to Council.

9 **Town Clerk Allen Coleman** said that he thought Randy had sent the policy but
10 he could send it again to everyone.

11 **Mayor Gilbert** said the Town regularly receives requests from residents
12 seeking to name facilities or other public assets in honor of loved ones. He stated that
13 there should be a standardized process and clear guidance for handling such
14 requests.

15 **Councilmember Gray** said that requests for naming recognition have
16 increased and said that establishing criteria for determining the significance of an
17 honoree presents the greatest challenge.

18 **Mayor Gilbert** said that other municipalities have established naming policies
19 and suggested researching best practices and consulting with legal counsel.

20 **Town Manager Randy Vosburg** stated that the Town already has a
21 comprehensive policy addressing the naming of facilities, which Town Clerk Coleman
22 had resent to Council. He added that staff has also been working on policies related
23 to group sponsorships. He explained that the current gap involves requests that do
24 not clearly fall under either facility naming or sponsorships, such as naming a bench
25 or similar amenity, and suggested revisiting the existing naming policy to address
26 those situations.

1 **Councilmember Gray** said he supports recognizing individuals while they are
2 still living and suggested using the existing facility naming policy as a framework for
3 evaluating requests involving non-facility assets.

4 **Mayor Pro-Tempore Mahaffey** said there is an important distinction between
5 recognition associated with retirement or service celebrations and broader public
6 naming decisions. He noted that gestures such as dedicating an item during a
7 retirement celebration are intended to honor an individual's service and should not
8 necessarily serve as the model for broader naming policies.

9 **Councilmember Reese** said he agreed with that distinction, particularly in
10 situations involving sponsorships or donor-funded amenities such as benches. He
11 acknowledged the value of honoring individuals during their lifetime but observed
12 that, historically, public recognition has often come after an individual's service has
13 concluded. He stated that his personal philosophy favors honoring individuals
14 without creating an expectation of recognition during their service.

15 **Councilmember Mu** suggested establishing tiers for naming recognition, such
16 as eligibility criteria for retired Council members based on years of service or for
17 employees with long-term service to the Town.

18 **Mayor Gilbert** stated that staff should research the issue and return with
19 recommendations for further Council discussion.

20 **Town Manager Vosburg** said staff should review how the Town's various
21 naming and sponsorship policies relate to one another and determine what would be
22 appropriate to present to the Council committees for further consideration.

23 **Mayor Gilbert** agreed with that approach and asked if there was any other
24 business to discuss.

25 **Town Manager Randy Vosburg** informed Council that the PeakFest Council
26 booth would be located indoors due to the possibility of rain.

27 **Councilmember Mu** announced that the Z Camp "Connecting Community"
28 event would be held on Saturday from 11:00 a.m. to 1:00 p.m.

29
30 **[ADJOURNMENT]**

31 **Mayor Gilbert** adjourned the meeting at **5:02 p.m.**

Jacques K. Gilbert
Apex, Mayor

32
33
34 Allen Coleman, CMC, NCCCC

35 Town Clerk to the Apex Town Council

36 Submitted for approval by Apex Town Clerk Allen Coleman

37
38 Minutes approved on _____ of _____, 2026.