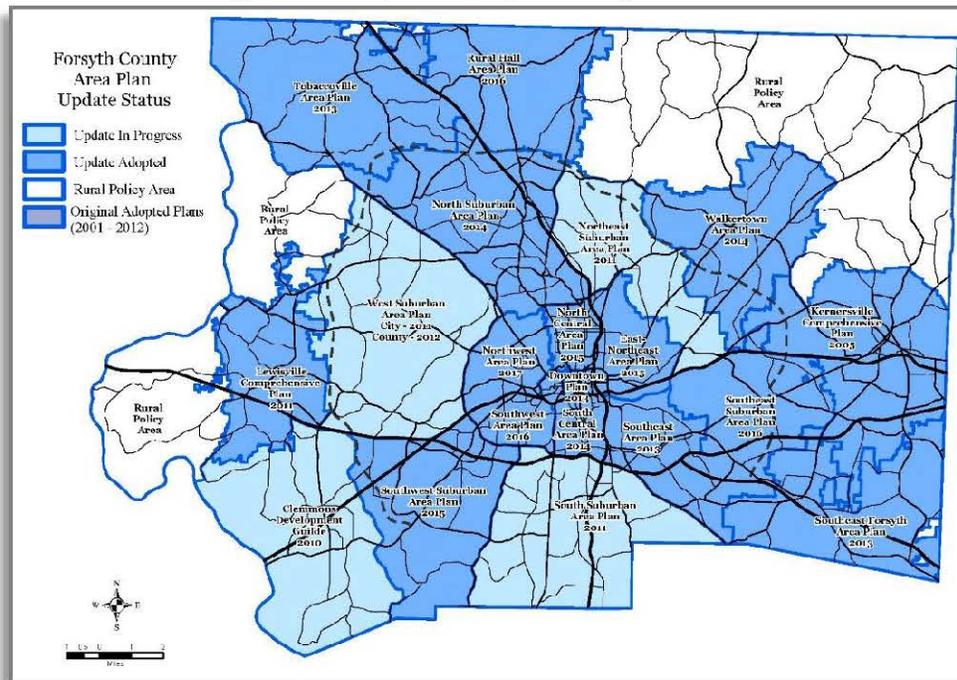


# 3- Summary of Key Trends and Conditions

## REGIONAL CONTEXT

The Village of Clemmons lies in the heart of the Triad region proximate to Winston-Salem in Forsyth County. Clemmons is one of the County’s seven perimeter communities located in the far southwest corner of the County. It is adjacent to Lewisville, and an unincorporated portion of Forsyth County called the Southwest Suburban Area as shown in Figure 2: Forsyth County Planning Areas.

**Figure 2: Forsyth County Planning Areas**



Impacts from growth in Bermuda Run, Davie County, northern Davidson County and Forsyth County outside of the Village’s land development purview affect Clemmons and how much it can plan for development (see Figure 3). Forsyth County adopted *The Legacy 2030 Update: The Comprehensive Plan For Winston-Salem, Forsyth County And its Towns* in 2013 to provide long-range growth and development direction for the County. This guide was adopted by Clemmons that same year and serves as one of the planning guides that decision-makers in the Village can consult when making land use and development decisions. The

guide is comprehensive in its scope, addressing growth management, transportation, regional planning, economic vitality, environmental quality, open space, parks and greenways, cities and town centers, neighborhoods, community character, community life, and active citizenship. The guide's Growth Management Plan map defines areas where urban, suburban, and rural land uses are expected to occur in the future (see Figure 4).

**Figure 3: Surrounding Area Plans**

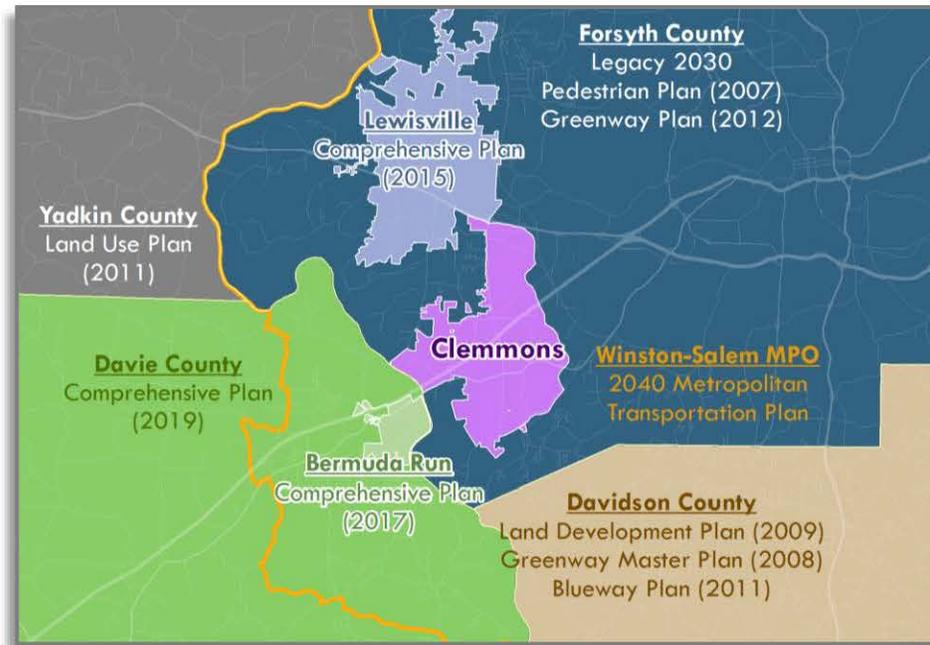
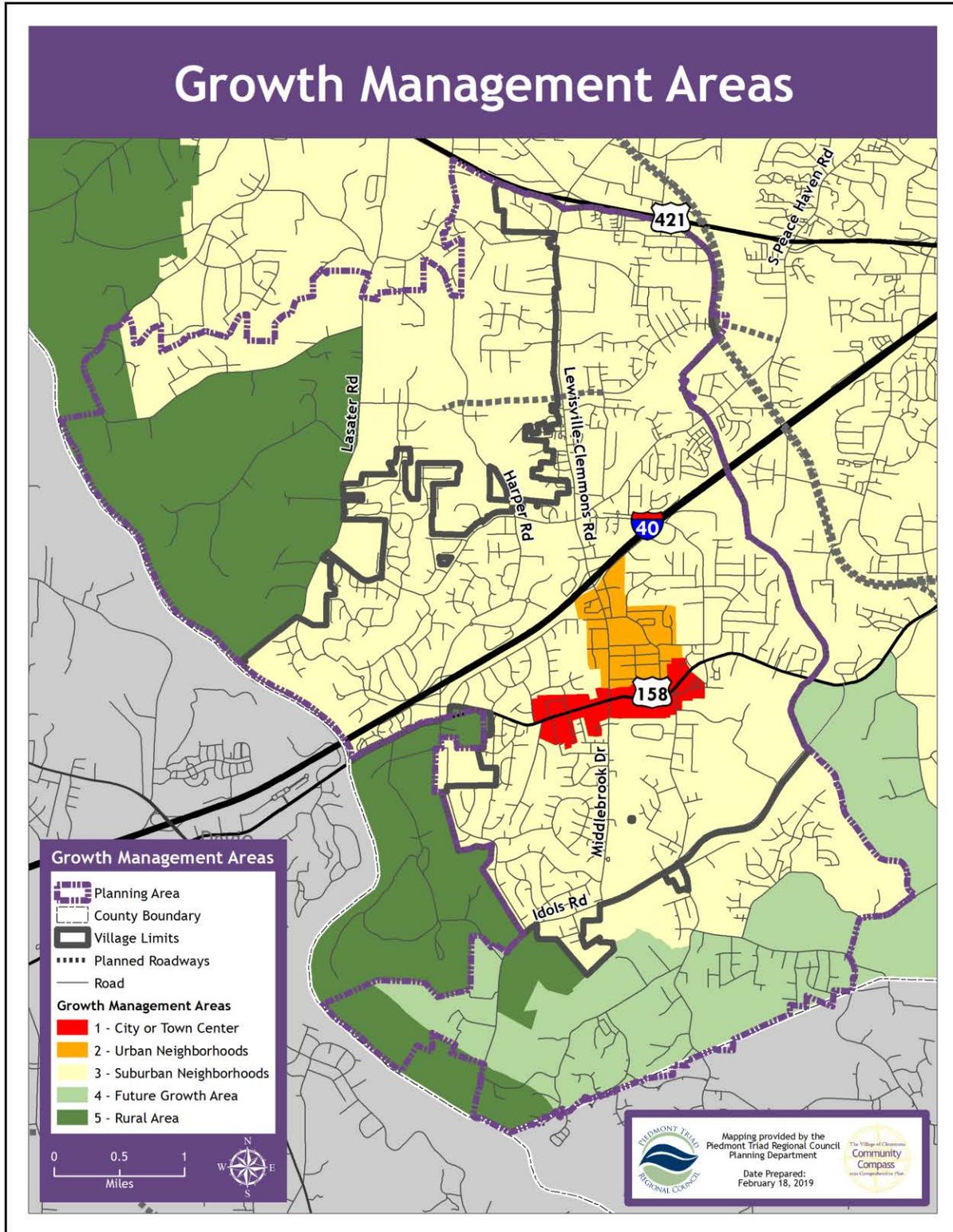


Figure 4 shows the County's designations for Growth Management Areas in and around Clemmons. The designations are:

- GMA 1 - city/town center; high-density area
- GMA 2 - urban neighborhoods; older neighborhoods close to city/town centers
- GMA 3 - suburban neighborhoods; relatively new development where water and sewer facilities are available
- GMA 4 - future growth area; areas where water and sewer will be extended but not currently provided
- GMA 5 - rural area; areas that will remain undeveloped often including protected watershed areas and riparian buffers

With *The Legacy 2030* update in 2013, Forsyth County worked with the Village of Clemmons to amend the GMAs in and around the Village to better reflect the Future Land Use map in Chapter 4 of this plan.

Figure 4: Growth Management Areas



## Demographic Trends

### Households and Population

The increase of households in the Clemmons planning study area between 2010 and 2017 was 6.5 percent. This is higher than Forsyth County's household increase of 2.8 percent and the North Carolina average increase in households of 3.4 percent. Even though these growth rates have slowed from the previous decade, in comparison to the state and Forsyth County, Clemmons' household growth rate has been significant since 2010. The increase of housing units compared to the increase of households in the planning study area for this same time period was slightly lower at 4.8 percent, suggesting an increase in housing unit occupancy from 91.6 percent in 2010 to 93 percent in 2017.

The 2017 Clemmons planning area population was 25,487, an 8.4 percent increase from 2010. This population growth surpassed the population growth in Forsyth County (5 percent) and the state's average population growth (5.4 percent). For this same year, the planning area population comprised approximately 6.9 percent of the County's total population. The Village of Clemmons total population in 2017 was 19,844, comprising 5.4 percent of the County's population.

In 2017, 31 percent of the planning area population was between the ages of 45 and 64. In comparison, only 17.1 percent of the population was between the ages of 18 and 34. These statistics will likely have implications on future housing needs, the tax and employment base, and infrastructure and service needs.

Due to changes in the economy and the recent slowing of growth regionally and nationally, the 2017-2030 annual compounded growth rate (0.70 percent) is expected to be slightly lower than the 2010-2017 annual compounded growth rate (0.90 percent). Under this forecast, the Clemmons planning area is projected to add an additional 2,419 persons with a total population of 27,906 by 2030.

#### ***Objective #1: Monitor Changing Demographics in Clemmons***

Continue to monitor the age demographics of the Clemmons planning area and immediate area to better plan for the needs of a changing population.

### Wages and Employment

In 2017, more than 32 percent of Clemmons households earned more than \$100,000 per year. This is almost double the number of households in that same income bracket for Forsyth County (19.7 percent).

After the economic downturn in 2008, Forsyth County continued to lose jobs until 2011, hitting a low of 171,002 jobs. Between 2011 and 2017, Forsyth County produced 12,539 jobs to reach 183,541. Health care and social assistance gained the most jobs during this period (7,420 jobs) while manufacturing lost the most jobs (2,022 jobs lost).

In 2015, there were 11,101 employed residents in the planning area. The employed residents outpaced the 7,152 jobs located in the planning area by 155 percent.



While 6.8 percent of the County’s population resides in the Clemmons market study area, only about 3.9 percent of the County’s jobs are located in the planning area. Employment in the Clemmons planning area is not keeping pace with population and household growth.

**Objective #2: Monitor Jobs-Housing Imbalance in Clemmons**  
Continue to monitor employment and population growth in the Clemmons planning area and seek solutions to the jobs-housing imbalance.

## LAND USE AND DEVELOPMENT TRENDS

### Existing Land Use

Approximately 49 percent of land in the Clemmons planning area is used for single-family detached housing (including mobile homes). Another 32 percent is undeveloped. Multi-family detached housing (i.e., condominiums, townhomes, apartments) comprise approximately 2 percent. Approximately 3.8 percent of land is used for taxable, nonresidential land uses (i.e., retail, industrial, office). Another 3.1 percent of the land is used for tax exempt public and institutional uses and 8.1 percent is used for right-of-ways.

The land use mix in the Clemmons planning area has and will continue to have implications on the fiscal health of the community and the future facilities and services that the Village can provide. A map of these land uses is provided in Appendix A: Maps.

**Table 1: Existing Land Use**

LAND USE	ACRES	% OF PLANNING AREA 2017	% OF PLANNING AREA 2009**
Single-Family	7,704	49.0%	58.4%
Mobile Home Park	103	0.7%	3.6%
Multi-Family*	295	1.9%	
Undeveloped	5,011	31.9%	28.8%
Public/Institutional	486	3.1%	3.2%
Industrial	262	1.7%	1.7%
Commercial	220	1.4%	2.1%
Parks/Recreation	169	1.1%	1.4%
Office	105	0.7%	0.9%
Utility	90	0.6%	n/a
ROW	1,275	8.1%	n/a
<b>TOTAL</b>	<b>15,720</b>		

\*Includes apartments and townhouse/condos.

\*\*2009 Study did not include ROW or utility easements and was based on 12,792 acres

## Development Trends

### Residential Trends

Over the past decade, most residential development activity in Forsyth County has occurred in the suburban ring area followed by the perimeter communities where Clemmons is located.

#### Residential Unit Type Trends

Between 2010 and 2017, approved new construction residential building permits in Clemmons consisted of 67 percent single-family units and 33 percent multi-family units. According to tax parcel records in the Clemmons planning area, an estimated 350 single-family units were built between 2010 and 2015. Another estimated 108 duplex/condo units were built and 312 apartment units in the Town Center Apartment complex, meaning that more multi-family units were constructed during this time than single-family. In 2017, the overall vacancy rate in Clemmons was 8.1 percent, lower than the vacancy rate in Forsyth County (10.4 percent) and the state (14.3 percent).

#### Housing Price Trends

Median home sales in Clemmons have been increasing over the past several years. In 2018, the average monthly median home sale in Clemmons was \$219,325, compared to \$150,008 in Forsyth County and \$202,067 in Lewisville. In 2015, the average monthly median home sale in Clemmons was \$174,100, compared to \$128,683 in Forsyth County and \$185,525 in Lewisville. The upward trend demonstrates a desirable housing market in Clemmons.

#### Residential Forecast

Building off of the expected population growth of 2,419 people by year 2030 and the average household size for 2017 of 2.53 people, the Clemmons planning area may add an additional 956 housing units by year 2030.

### Non-Residential

Based on tax parcel data obtained from Forsyth County in 2017, the Clemmons planning area contains roughly 5.56 million square feet of non-residential space. Of this, 1.97 million square feet is categorized as industrial (36 percent). Another 1.4 million square feet (25 percent) is commercial, 1.51 million square feet is institutional (27 percent), and 653,765 square feet (12 percent) is office.

After the economic downturn in 2008, retail vacancy rates in the Winston-Salem metropolitan area remained high, around 20 to 23 percent. In recent years, the overall retail vacancy rate has dropped down to near 16 percent in 2017. In the Village of Clemmons, this rate is estimated to be slightly higher, around 18.6 percent, however lower than in previous years. Peace Haven Village is the newest commercial development, on the corner of Peace Haven Road and Lewisville-Clemmons Road. This shopping center currently houses Publix and a few other local shops and restaurants.



**Objective #3: Focus Commercial Development within Activity Centers**

Focus future retail and office development within activity centers and in redevelopment areas along key commercial corridors.

**Objective #4: Ensure Future Industrial Sites Have Adequate Facilities**

New industrial development should be located in areas that are adequately served by roads, water, and sewer.

**Transportation Trends**

More than 12.6 million daily motor vehicles miles traveled (DVMTs) were estimated for Forsyth County in 2016, an increase of 1.6 million DVMTs since 2010. This translates to average daily vehicles trips of 34 miles per day for every person in the County, an increase of 3 miles traveled per day per person since 2010.

Based on the number of workers compared to employment in the Clemmons planning study area, 93 percent of workers in the planning study area commute elsewhere to work. The 2017 American Community Survey provides statistics on means of transportation to work (see Table 2) that compare means of transportation used in the Village to all of Forsyth County. Generally speaking, Clemmons commuter trends were similar to Forsyth County; however, more people on average drove alone and carpooled when compared to the County.

**Table 2: Means of Transportation to Work 2017**

MEANS OF TRANSPORTATION	FORSYTH COUNTY		VILLAGE OF CLEMMONS	
	#	% of Total	#	% of Total
Drove alone	138,449	83.9%	8,255	86.3%
Carpooled	12,280	7.4%	756	7.9%
Public transportation	1,635	1.0%	10	0.1%
Walked	2,690	1.6%	63	0.7%
Other (including bicycle)	1,804	1.1%	40	0.4%
Worked at home	8,240	5.0%	442	4.6%

**Objective #5: Promote Development of Transit Service to Clemmons and Provide Needed Amenities to Support Service**

To reduce traffic on regional roadways, promote development of a regional bus route that provides service from Clemmons to Winston-Salem. Work with regional transportation agencies to locate and develop a park and ride lot with a variety of service times to support future transit service.

## Environmental Features

The Clemmons planning area includes many creeks and wetland areas, and is bordered by the Yadkin Pee-Dee River. Blanket Bottom Creek diagonally bisects the planning area to the north of I-40 and Muddy Creek borders the planning area to the east. Development is constrained in the floodplains of water bodies and within wetland areas in accordance with Federal, State, and local laws.

A large portion of the Clemmons planning area lies within a North Carolina designated Water Supply IV-Protected Area (WS-IV). This classification applies to moderate and highly developed water supply watersheds and protects areas near rivers and lakes within large drainage areas.

Land use and development densities are regulated in this area to ensure that the public raw water supply taken at the Idols Dam intake is protected from the impacts of over-development, such as increased nutrient loads and sedimentation. Regulations limit new development in protected areas to the following:

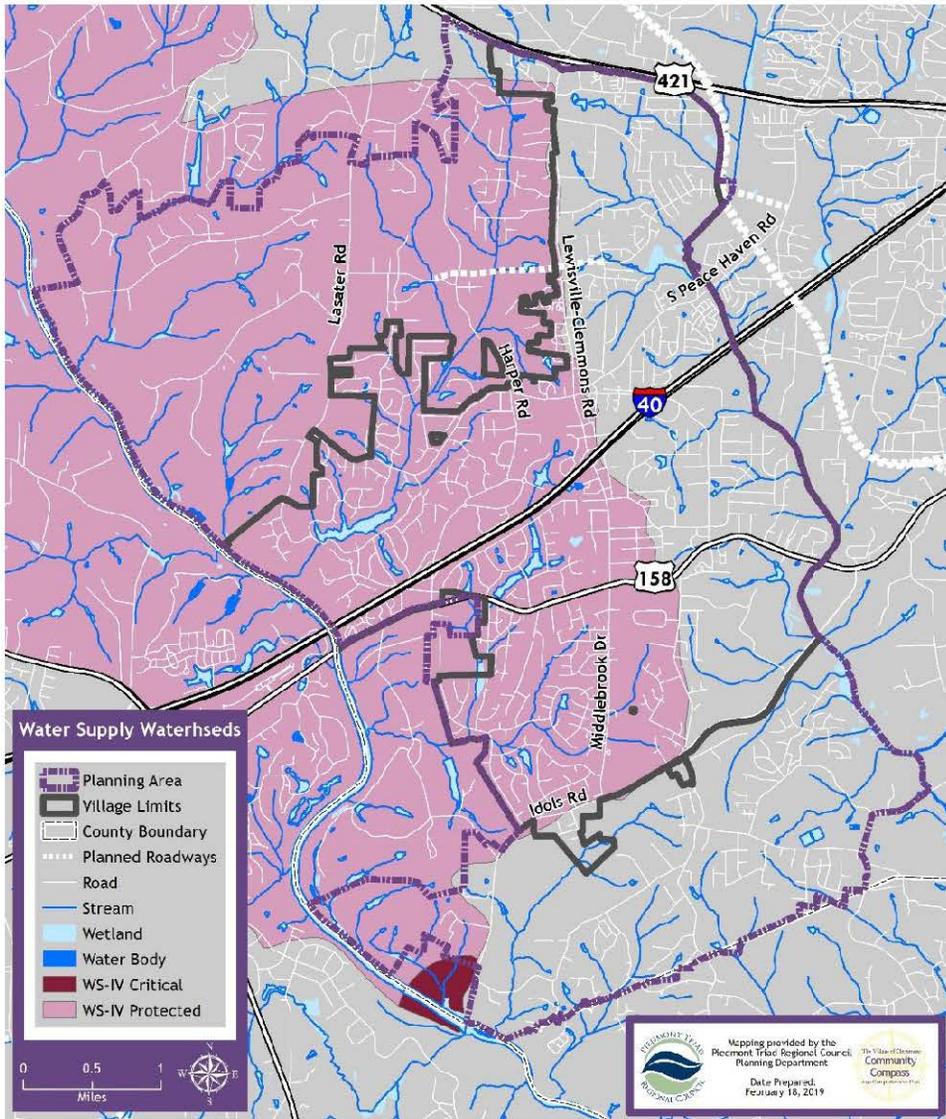
- Low Density Option #1: Two dwelling units per acre or 24 percent built-upon area
- Low-Density Option #2: Three dwelling units per acre or 36 percent built-upon area if no curb-and-gutter system is used
- High-Density Option #1: 70 percent built-upon area

Land within a half-mile upstream of the Idols Dam intake lies within a WS-IV Critical Area and have more stringent development options:

- Low Density Option #1: Two dwelling units per acre or 24 percent built-upon area
- High-Density Option #1: 50 percent built-upon area



Figure 5: Water Supply Watershed



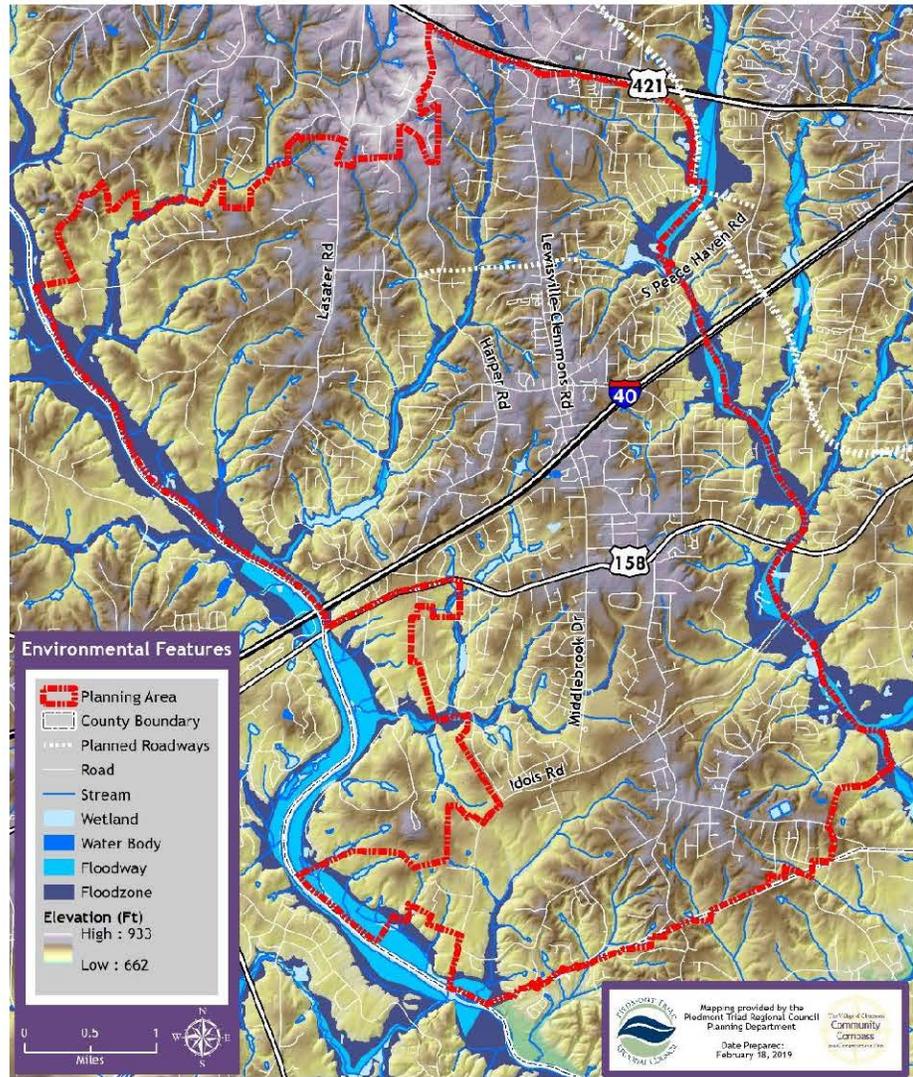
**Objective #6: Protect Critical Environmental Assets**

New development and redevelopment should be located to maximize the use of existing developed areas and reduce development footprints on undeveloped lands to protect critical environmental assets in the community.

**Objective #7: Use Environmental Assets**

Environmental assets, such as wetlands and creeks, should be used to serve as passive recreational areas, nature paths, and educational interpretation sites.

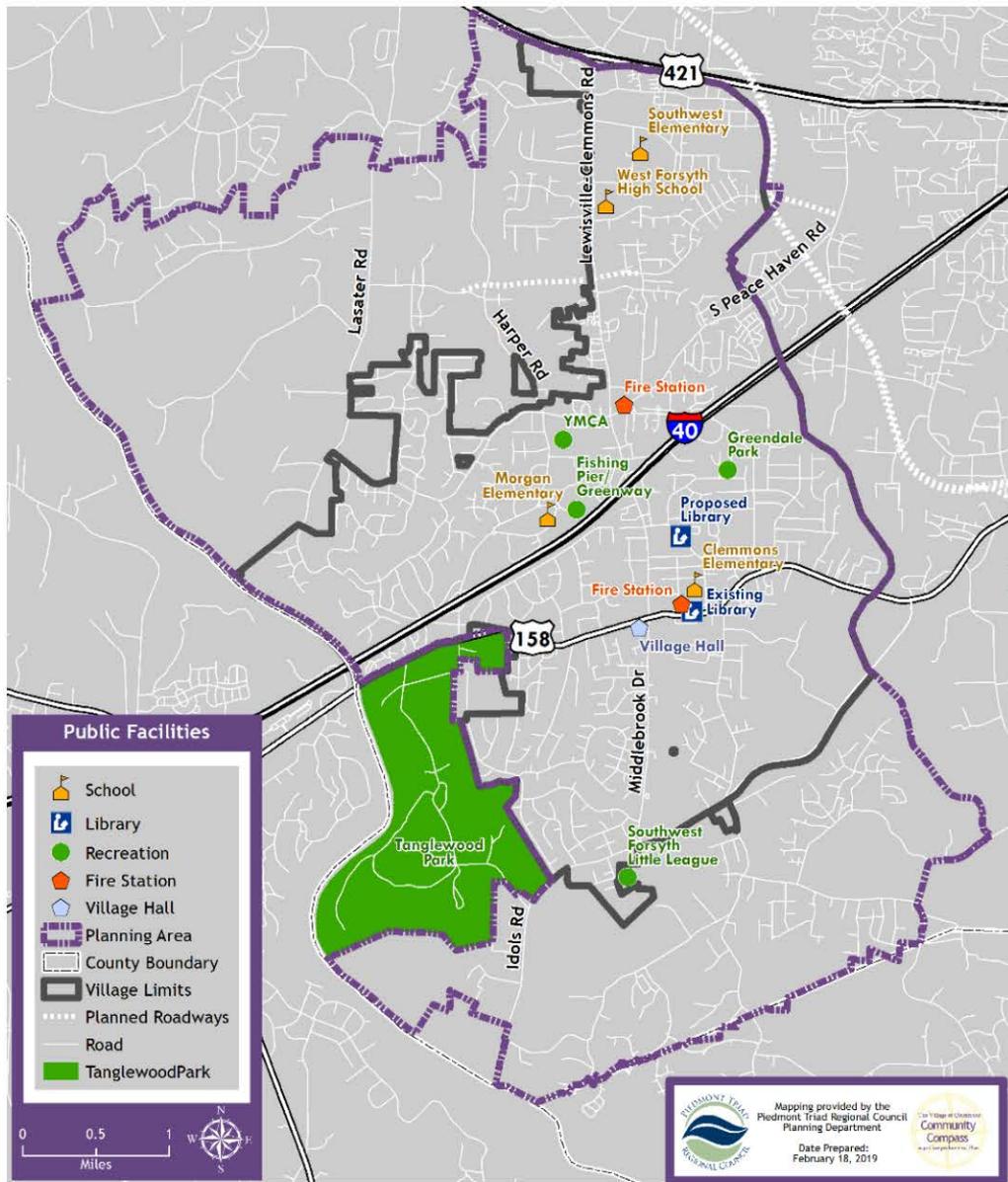
Figure 6: Environmental Features



## PUBLIC FACILITIES AND COMMUNITY SERVICES

Since its incorporation in 1986, the Village of Clemmons has provided citizens with affordable public facilities and services. Figure 7: Public & Community Facilities, shows the locations of prominent facilities in the Village.

Figure 7: Public & Community Facilities



### Facilities/Services Provided by Village of Clemmons

The Village of Clemmons levies local taxes and fees to provide several public services to residents and business owners within Clemmons. The following list includes the current public services provided by the Village. As the community grows, there may be need to expand these services or take on new services that are currently provided by other entities, such as the County.

**VILLAGE SERVICES FACTS**

- The Village recycled 1,243 tons of solid waste in FY 2017-18.
- The Village collects yard and grass clippings and uses the material to prepare free mulch for Village residents.

### Solid Waste and Recycling

The Village of Clemmons provides the following solid waste / recycling services to property owners in Clemmons:

- Weekly residential solid waste pick-up
- Weekly recycling pick-up from single-family residences
- Annual bulk item pick-up from single-family residences
- Cardboard recycling drop-off center
- Leaf/limb and grass collection (during season)
- Free mulch available to Village residents at Public Works Facility

### Infrastructure Maintenance and Improvements

Basic transportation infrastructure is maintained and improved by the Village of Clemmons:

- Street lights at intersections
- Street signs at intersections
- Maintenance of Village streets and sidewalks
- Street sweeping
- Maintenance of Greendale Way Park
- Maintenance of Village Point Lake Greenway

### Public Safety

Police protection is provided by seven sheriff deputies, two traffic officers, and two detectives contracted through the Forsyth County Sheriff's Department. The Sheriff's Substation is located off of US-158. The Clemmons Volunteer Fire Department is tasked with the responsibility of providing fire protection and emergency medical service (EMS). The fire department operated two stations: James Street Fire Station and Peace Haven Road Fire Station.

### Planning and Zoning

The Village of Clemmons provides land use planning, zoning, and code enforcement services to applicable developments in the Village, including plan and Unified Development Ordinance amendments, assistance to the Planning Board and Zoning Board of Adjustment, and issuance of driveway and stormwater management permits. The Village contracts with the City-County Inspections Division to provide building inspections, development permits, and code enforcement services.

## Facilities/Services Provided by Forsyth County

### Water and Sewer Service

The Winston-Salem/Forsyth County Utilities Division collects, treats, and distributes water and waste water county-wide. Studies have been conducted to evaluate the feasibility and cost to provide service to the Blanket Bottom Creek area (north of I-40 and west of Lewisville-Clemmons Road) and south of Idols Road where future development is likely to occur. These studies forecast that providing service to these areas will have a positive fiscal impact on the Village.

**Objective #8: Coordinate Utilities Planning with Forsyth County**

Work with Forsyth County to plan for the expansion of future utilities in a manner that reinforces the Clemmons future land use map and this comprehensive plan.

## Public Schools

Winston-Salem/Forsyth County Schools serves more than 54,000 students and is growing at a rate of one percent per year. As shown in Figure 7: Public & Community Facilities, there are four County Schools located in the Village of Clemmons:

- Clemmons Elementary School
- Southwest Elementary School
- Frank Morgan Elementary
- West Forsyth High School

As of FY 2015-2016, all of these schools, except for Southwest Elementary, had enrollment that exceeded each facility's capacity. With the voter approval of the 2006 Bond Plan, several schools were renovated to the total of \$250 million through 2011. Improvements and an expansion to the West Forsyth High School were completed in 2010. Frank Morgan Elementary was built off of Village Point Drive to serve the Clemmons area beginning in the 2011-2012 school year.

**Objective #9: Develop a "Clemmons Schools" Task Force**

The task force would develop a walk to school plan for adjacent neighborhood for all schools located in the Village of Clemmons municipal boundaries. The task force would encourage and promote walking to school, while seeking grant resources to implement signage or other safety improvements.

## Parks and Recreation

The Forsyth County Parks and Recreation Department provides park and recreation services throughout the County. The County does not operate any parks within the Village of Clemmons. Tanglewood Park, located immediately adjacent to the Village to the southwest, is a regional park that provides a wide variety of amenities to Village residents and visitors. Plans to increase access to the park through greenways and pedestrian ways are underway.

Forsyth County and the Village of Clemmons adopted the *Parks and Open Space Plan* in 2007. This plan is currently being updated by Forsyth County. The 2007 plan recommended two new community parks and several greenway trails within the Clemmons planning area. Since the adoption of the plan, the Village of Clemmons partnered with the N.C. Wildlife Resources Commission to construct a new handicapped-accessible fishing pier on Village Point Lake. The Commission stocked the lake and the Village built a greenway around the lake's perimeter and connecting to the Town Center Apartments.

## County Library

The Forsyth County Public Library operates the central library in Winston-Salem and nine branch libraries throughout the County. Clemmons has a branch library currently located on US-158 near the fire station and Clemmons Elementary

### KEY FISCAL FACTS

- The Village's property tax rate is limited to \$0.15 per \$100 valuation.
- The average tax rate for similar sized towns is \$0.44 per \$100 valuation.
- The current tax rate is \$0.115 – approximately \$0.035 less than the tax cap.
- If the current tax rate was raised to the tax cap, it would cost the average single-family household in Clemmons an additional \$75 annually.
- The majority of ad valorem taxes go to pay for public works and public safety.

School. In November 2010, a \$40 million bond was passed that would construct a new library in Clemmons along Stadium Drive behind Lowe’s Foods with plans to break ground by 2019.

### Other Basic Services

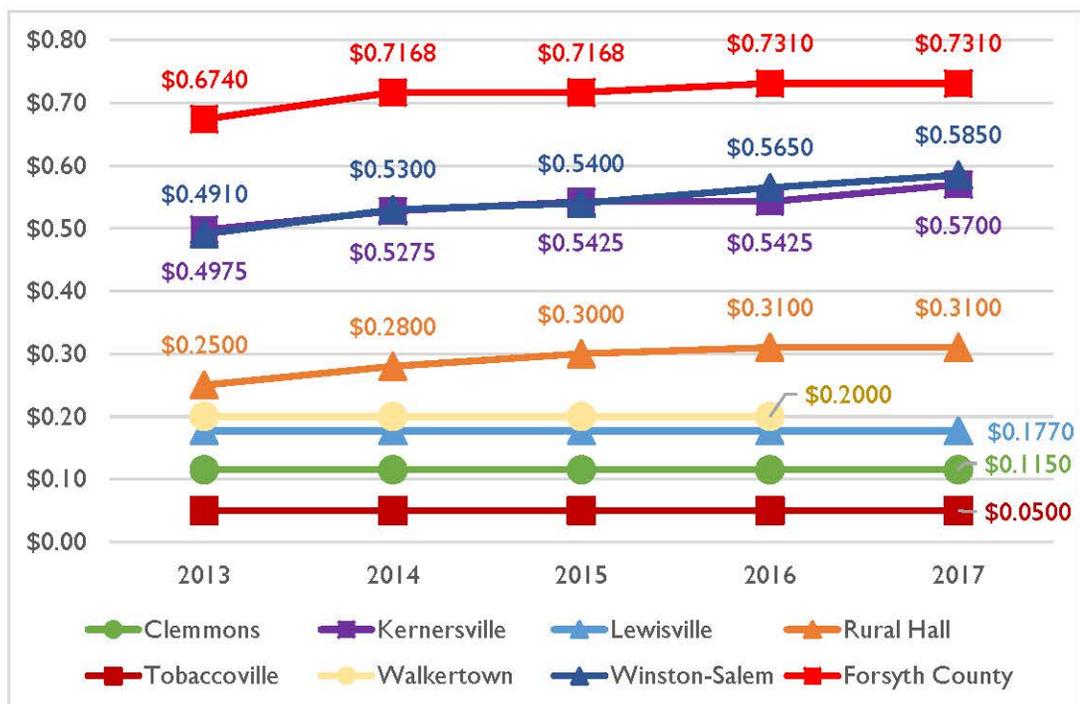
Services provided by the Health Department, Animal Control, Social Services, and other Forsyth County departments are provided to residents of Clemmons.

### Property Values and Tax Rates

Residential and commercial property tax values in the Clemmons planning area total nearly \$2.4 billion in 2017. Approximately \$1.89 billion of that value is on property within the Village’s corporate limits. Approximately 77 percent of this tax base is residential and 23 percent is non-residential. This imbalance in the property tax base is a real concern for the future fiscal health of the Village.

The Village’s ad valorem tax rate is capped at \$0.15 per \$100 of real property by the State. Currently, the Village tax rate is \$0.115 per \$100 of real property, \$0.035 less than the tax rate cap. As shown in Figure 8: Forsyth County’s Community Tax Rates, 2013-2017, Clemmons’ tax rate is very affordable in comparison with other communities in Forsyth County. Even though Clemmons is the third largest community by population in the County, only Tobaccoville has lower tax rate than Clemmons. The average tax rate for similar sized towns in North Carolina is \$0.44 per \$100 valuation. If the Village were to raise the tax rate to the cap of \$0.15, that would cost the average single-family household in Clemmons an additional \$75 annually.

Figure 8: Forsyth County’s Community Tax Rates, 2013-2017



## Budget Revenues and Expenses in 2017

Total revenue for the Village of Clemmons totaled \$6.8 million in fiscal year (FY) 2016-2017. This includes fund transfers from reserves or other sources used to balance the budget. Almost 35 percent of the revenue was generated from real and personal property (ad valorem) taxes, with the majority 65 percent coming from fees and other taxes. These fees and other taxes are divided into two categories: those that remain constant, including temporary line items, and those that change with growth.

Total expenditures in FY 2016-2017 totaled almost \$7.7 million. Public works expenses were half of the expenses. More than 90 percent of Village expenses are expected to be impacted by future growth.

Subtracting expenses from gross revenue resulted in net revenue of -\$870,961 in FY 2016-2017. Part of this negative net revenue can be explained by a large capital outlay construction projects on roads and the capital outlay purchase of land for a library; however, the current revenue structure is also a factor.



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