



Town of Carrboro

Town Hall
301 W. Main St.
Carrboro, NC 27510

Meeting Agenda Board of Aldermen



Tuesday, October 20, 2015

7:30 PM

Board Chambers - Room 110

A. REQUESTS FROM VISITORS AND SPEAKERS FROM THE FLOOR

B. RESOLUTIONS, PROCLAMATIONS, AND ACKNOWLEDGEMENTS

7:30-7:35

C. CONSENT AGENDA

1. **15-0358** Approval of Previous Meeting Minutes
2. [15-0351](#) Permit Extension Request for Previously Issued Conditional Use Permit for the Shoppes at Jones Ferry at 405 Jones Ferry Road

PURPOSE: The Board is asked to review a request for an extension of the date when a Conditional Use Permit would otherwise expire for The Shoppes at Jones Ferry at 405 Jones Ferry Road. The Town Staff recommends approval of the request.

Attachments: [Staff Report](#)
[Resolution](#)
[Letter from Applicant](#)

3. [15-0352](#) Permit Extension for Previously Issued Conditional Use Permit for The Matthew's Family Building at 609 Highway 54 West

PURPOSE: The Board is asked to review a request for an extension of the date when a Conditional Use Permit would otherwise expire for the Matthew's Family Building at 609 Highway 54 West. The Town Staff recommends approval of the request.

Attachments: [Staff Report](#)
[CUP Extension Resolution](#)
[Letter from Applicant](#)

4. [15-0353](#) Permit Extension Request for Previously Issued Conditional Use Permit for The Butler Mixed-Use CUP at 120 Brewer Lane

PURPOSE: The Board is asked to review a request for an extension of the date when a Conditional Use Permit would otherwise expire for The Butler Mixed-Use CUP. The Town Staff recommends approval of the request

Attachments: [Attachment A - resolution](#)
[Attachment B - Application Materials](#)
[Attachment C- Original CUP document](#)

5. [15-0360](#) Request to Make an Appointment to the Planning Board

PURPOSE: The purpose of this agenda item is for the Mayor and Board to make an appointment to the Planning Board.

Attachments: [Attachment A - Appointment Resolution](#)
[Chair Recommendation Forms - Hathaway Pendergrass.pdf](#)
2015 September - Hathaway Pendergrass - Planning Board.pdf

D. OTHER MATTERS

7:35-7:55

1. [15-0357](#) Presentation from the North Carolina League of Municipalities Regarding Issues from the 2015 Session of the North Carolina General Assembly

PURPOSE: The purpose of this item is to hear a presentation from Erin Wynia, the NCLM Legislative and Regulatory Issues Manager regarding an update from the recently adjourned 2015 Session of the NC General Assembly.

7:55-8:20

2. [15-0350](#) Update on the Rogers Road Sewer Project, Proposed Utility District, Community Outreach and Interlocal Agreement

PURPOSE: The purpose of this agenda item is to provide the Board of Aldermen an opportunity to receive information and discuss the status of the Rogers Road Sewer Project, Community Outreach, and Management and Funding.

Attachments: [Attachment A - Draft Interlocal Agreement - Rogers Road 2015](#)
[Attachment B - OWASA 2015 10 20 TOC BOA HRRRA Update](#)
[Attachment C - S 2015-218 Interlocal Agreement Relating to Design of a Sewer Main Extensio](#)
[Attachment D - S 2015-354-E County Manager - Marian Cheek Jackson Center for Saving and Ma](#)
[Attachment E - Updated Agenda for Community Meeting July 28](#)
[Attachment F - 2015 10 09 project update--HRRRA sewer design](#)
[Attachment G - Summary Update on Progress of Rogers Road Work 10 14 15](#)
[Attachment H - Rogers Road Water and Sewer District Draft.pdf](#)

8:20-8:40

3. **15-0356** Discussion of Carrboro Vision2020, and its utility in guiding land use decisions that advance social equity

PURPOSE: The purpose of this agenda item is to provide the Mayor and Board members with an opportunity to discuss the usefulness of Carrboro Vision2020 in guiding decision making, with a particular focus on the provisions relating to social equity.

Attachments: Attachment A - Resolution Related to Carrboro Vision2020 9-22-15.doc
Attachment B - Minutes Board Retreat 2-15-15
Attachment C -Vision 2020 and Justice 9-18-15
Attachment D - Carrboro Vision2020
Attachment E - 2010 Retreat Vision 2020 Status Report
Attachment F - City of Seattle Equity Analysis
Attachment G - RacialEquityToolkit_FINAL_August2012
Attachment H - Equity and Social Justice - King County.pdf
Attachment I - Latino Intervention, Muscatine Iowa

8:40-9:00

4. [15-0354](#) Discussion of Options for the 2016 Board of Aldermen Retreat

PURPOSE: The purpose of this item is for the Board of Aldermen to discuss various options for a Board retreat.

E. BRIEF UPDATE BY BOARD MEMBERS

F. MATTERS BY TOWN MANAGER

G. MATTERS BY TOWN ATTORNEY

H. MATTERS BY TOWN CLERK



Town of Carrboro

Town Hall
301 W. Main St.
Carrboro, NC 27510

Agenda Item Abstract

File Number: 15-0351

Agenda Date: 10/20/2015

File Type: Agendas

In Control: Board of Aldermen

Version: 1

TITLE:

Permit Extension Request for Previously Issued Conditional Use Permit for the Shoppes at Jones Ferry at 405 Jones Ferry Road

PURPOSE: The Board is asked to review a request for an extension of the date when a Conditional Use Permit would otherwise expire for The Shoppes at Jones Ferry at 405 Jones Ferry Road. The Town Staff recommends approval of the request.

DEPARTMENT: Planning Department

CONTACT INFORMATION: James Thomas, 918-7335

INFORMATION: The property owner, Calvin Mellot, has requested an extension of the date on which a previously issued Conditional Use Permit (CUP) would otherwise expire. The Board of Aldermen originally granted the Conditional Use Permit on September 25th, 2007.

The original developer objected to one or more conditions placed on the CUP by the Board of Aldermen and appealed those impositions to Superior Court, which ruled in favor of the Board of Aldermen. The developer appealed this decision to the Court of Appeals which determined that the Board of Aldermen had failed to include adequate findings of fact in its order approving the permit with the conditions in question and remanded that case back to the Superior Court with the instructions to the Superior Court to remand the case to the Board of Aldermen to make findings of fact to support its decision to impose the conditions. Afterwards, the permit remained inactive but still valid until at least November 21, 2013, as described in the Abstract for this agenda item.

The Board of Aldermen extended the permit for an additional year at their November 21st, 2014 meeting with an expiration date of November 21st, 2015.

In essence, Mr. Mellot wishes to receive an extension to the date on which the Conditional Use Permit would otherwise expire.

FISCAL & STAFF IMPACT: None

Agenda Date: 10/20/2015

File Type:Agendas

In Control: Board of Aldermen

Version: 1

RECOMMENDATION: Town Staff recommends that the Board of Aldermen adopt the attached resolution approving the permit extension request. The new expiration date for the permit would be October 20th, 2017.

STAFF REPORT

TO: Board of Aldermen

DATE: October 20th, 2015

PROJECT: Conditional Use Permit Extension Request for The Shoppes at Jones Ferry at 405 Jones Ferry Road

APPLICANT/OWNERS: Calvin & Nora Mellot
PO Box 537
Carrboro, NC 27510

PURPOSE: Request for an extension of date when Conditional Use Permit would otherwise expire for The Shoppes at Jones Ferry project.

EXISTING ZONING: M1- Light Manufacturing

PIN: 9778-64-1957 & 9778-54-9917

LOCATION: 405 Jones Ferry Road

TRACT SIZE: 7.771 acres/335,858 square feet

EXISTING LAND USE: Construction Yard- Permissible Use # 3.220

PROPOSED LAND USE: Use 2.110- High-Volume Traffic Generation Sales

SURROUNDING LAND USES: North: M1- OWASA/Jones Ferry Road
South: R-7.5- University Lake Apartments
East: R-7.5- Single-family residence/Barnes Street
West: R-7.5- Collins Crossings Apartments

ZONING HISTORY: M1, since 1980

RELEVANT ORDINANCE SECTIONS: Section 15-62 Expiration of Permits

BACKGROUND

The property owner, Calvin Mellot, has requested an extension of the date on which a previously issued Conditional Use Permit (CUP) would otherwise expire. The Board of Aldermen originally granted the Conditional Use Permit on September 25th, 2007.

The original developer objected to one or more conditions placed on the CUP by the Board of Aldermen and appealed those impositions to Superior Court, which ruled in favor of the Board of Aldermen. The developer appealed this decision to the Court of Appeals which determined that the Board of Aldermen had failed to include adequate findings of fact in its order approving the permit with the conditions in question and remanded that case back to the Superior Court with the instructions to the Superior Court to remand the case to the Board of Aldermen to make findings of fact to support its decision to impose the conditions. Afterwards, the permit remained inactive but still valid until at least November 21, 2013, as described in the Abstract for this agenda item.

The Board of Aldermen extended the permit for an additional year at their November 21st, 2014 meeting with an expiration date of November 21st, 2015.

In a letter submitted to staff regarding this matter, David Rooks, representing Mr. Mellott, cited market conditions and economic factors as reasons why he has not moved forward expeditiously with construction of the project.

Should the Board choose to grant the permit extension request, please note that construction plans must still be reviewed and approved, and a pre-construction meeting must be held before construction may begin. Following is a description of the applicable LUO sections regarding this application, along with staff's determinations with compliance for each one.

APPLICABLE LUO PROVISIONS

Extensions to the date on which a permit would otherwise expire must be granted in accordance with Section 15-62 (Expiration of Permits) of the LUO, which is included below, section-by-section. As previously mentioned, Mr. Mellott has been trying to obtain interest from potential grocery stores, but no work (0%) has been completed on the site to date.

Section 15-62(c) gives the permit-issuing authority (Board of Aldermen) the authority to grant an extension to the date on which the permit would otherwise expire. Section 15-62(c) reads as follows:

“(c) The permit-issuing authority may extend for a period up to two years the date when a permit would otherwise expire pursuant to subsections (a) and (b) if it concludes that (i) the permit has not yet expired, (ii) the permit recipient has proceeded with due diligence and in good faith, and (iii) conditions have not changed so substantially as to warrant a new

application. Successive extensions may be granted for periods up to two years upon the same findings. All such extensions may be granted without resort to the formal processes and fees required for a new permit.”

Staff offers the following information related to the conditions outlined in Section 15-62(c):

1. The permit has not yet expired.

COMPLIANCE: *Yes, it is true that the permit has not expired. As previously mentioned, the permit would expire on November 21st, 2015 should an extension not be granted.*

2. The permit recipient has proceeded with due diligence and in good faith.

COMPLIANCE: *Yes, according to a letter provided by David Rooks, Mr. Mellott has proceeded with due diligence and in good faith and has received expressions of interest in the property as permitted but no one has made a firm offer as of yet for this project.*

3. Conditions have not changed so substantially as to warrant a new application.

COMPLIANCE: *Yes, it is true that conditions have not changed so substantially as to warrant a new application. No changes to the property have taken place since the permit was originally approved.*

RECOMMENDATION

Town Staff recommends that the Board of Aldermen adopt the attached resolution approving the permit extension request. The new expiration date for the permit would be October 20th, 2017.

**A RESOLUTION APPROVING THE EXTENSION OF THE DATE ON WHICH
A CUP WOULD OTHERWISE EXPIRE FOR THE SHOPPES AT JONES
FERRY AT 405 JONES FERRY ROAD**

WHEREAS, the Carrboro Board of Aldermen approved a Conditional Use Permit for The Shoppes at Jones Ferry at 405 Jones Ferry Road on September 25, 2007; and

WHEREAS, the current expiration date for the permit was November 21, 2015, and

WHEREAS, Section 15-62(a) of the Town of Carrboro Land Use Ordinance states that a CUP will expire automatically within two years of the issuance date if less than ten percent (10%) of the total cost of the project has been completed on site, unless the permit-issuing authority extends the expiration date pursuant to the findings found in Section 15-62(c) of the Land Use Ordinance;

WHEREAS, the Board of Aldermen finds, per Section 15-62(c) of the LUO, that: 1) the CUP has not yet expired 2) the permit recipient has proceeded with due diligence and in good faith, and 3) conditions have not changed so substantially as to warrant a new application.

NOW, THEREFORE BE IT RESOLVED that the Carrboro Board of Aldermen hereby extend the date on which the CUP for the Shoppes at Jones Ferry project otherwise would expire. The new expiration date is October 20th, 2017.

This the 20th day of October 2015.

NORTHEN BLUE, L.L.P.
A LIMITED LIABILITY PARTNERSHIP
ATTORNEYS AT LAW
THE EXCHANGE AT MEADOWMONT
1414 RALEIGH ROAD
SUITE 435
CHAPEL HILL, NORTH CAROLINA 27517

JOHN A. NORTHEN
J. WILLIAM BLUE, JR.
DAVID M. ROOKS
VICKI L. PARROTT
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E-MAIL: info@northyblue.com

October 14, 2015

Hon. Lydia Lavelle
Mayor
Town of Carrboro
301 W. Main Street
Carrboro, NC 27510

Re: Special use permit issued to Calvin and Nora Mellott and Mellott Trucking and Supply, Co. on property at 407 Jones Ferry Road, PIN: 9778549917 & 9778641957


Dear Mayor Lavelle:

I represent Mr. & Mrs. Mellott and Mellot Trucking and Supply Company who own two parcels on Jones Ferry Road where Mr. Mellott's grading contracting business is now headquartered. I write to request that the Board of Alderman again extend the special use permit it granted to Mr. & Mrs. Mellott, Mellott Trucking and Supply Co. and Northwest Property Group, LLC as developer for the two tracts for one year pursuant to Section 15-62(c) of the Land Use Ordinance. Mr. Mellott will deliver the extension fee in the amount of \$350.00 by hand this afternoon.

The Mellotts have proceeded with all the diligence a weak economy would allow them to muster and they have acted in good faith. There have no changes in the surrounding property or in the use of the applicants' property that would warrant a new application.

Please let me know if you need any additional information.

Sincerely,
NORTHEN BLUE, L.L.P.


David M. Rooks

Hon. Lydia Lavelle
October 14, 2015
Page 2

DMR
dc: Calvin Mellott
Marty Roupe



Town of Carrboro

Town Hall
301 W. Main St.
Carrboro, NC 27510

Agenda Item Abstract

File Number: 15-0352

Agenda Date: 10/20/2015

File Type: Agendas

In Control: Board of Aldermen

Version: 1

TITLE:

Permit Extension for Previously Issued Conditional Use Permit for The Matthew's Family Building at 609 Highway 54 West

PURPOSE: The Board is asked to review a request for an extension of the date when a Conditional Use Permit would otherwise expire for the Matthew's Family Building at 609 Highway 54 West. The Town Staff recommends approval of the request.

DEPARTMENT: Planning Department

CONTACT INFORMATION: James Thomas, 918-7335

INFORMATION: The property owner, Mr. Bud Matthews, has requested an extension of the date on which a previously issued Conditional Use Permit (CUP) would otherwise expire. The Board of Aldermen originally granted the Conditional Use Permit on September 25th, 2007. The CUP allowed the renovation of the existing 3,200 square foot building and the construction of metal type prefabricated building that is approximately 3,000 square feet in size.

The Board of Aldermen extended the CUP once before and set the new expiration on September 25th, 2010 and then State Bill 831 extended the expiration of this CUP till November 21st, 2013.

The Board of Aldermen extended the CUP for an additional year with an expiration date of November 21st, 2015.

In essence, Mr. Matthews wishes to receive an extension to the date on which the CUP would otherwise expire.

FISCAL & STAFF IMPACT: None

RECOMMENDATION: The Town Staff recommends that the Board of Aldermen adopt the attached resolution approving the permit extension request. The new expiration date for the permit would be October 20th, 2017.

STAFF REPORT

TO: Board of Aldermen

DATE: October 20th, 2015

PROJECT: Conditional Use Permit Extension Request for The Matthew's Family Building at 609 Highway 54 West

APPLICANT: Bud Matthews
205 Severin Street
Chapel Hill, NC 27516

OWNER: W3M, LLC
205 Severin Street
Chapel Hill, NC 27516

PURPOSE: Request for an extension of date when Conditional Use Permit would otherwise expire for The Matthew's Family Building project.

EXISTING ZONING: B-5- Watershed Commercial

TAX MAP NUMBER: 7.113.B.22

LOCATION: 609 Highway 54 West

TRACT SIZE: 2.08 acres/90,797 square feet

EXISTING LAND USE: Vacant- existing masonry building on-site

PROPOSED LAND USE: Use# 3.120, 2.120, 2.130, 2.220, 2.230 & 3.220

SURROUNDING LAND USES: North: Street Right-of-Way
South: WR- Single Family Residence
East: B5- Vacant
West: WR- Single Family Residence

ZONING HISTORY: B5, since 1983

RELEVANT ORDINANCE SECTIONS: Section 15-62 Expiration of Permits

BACKGROUND

The property owner, Mr. Bud Matthews, has requested an extension of the date on which a previously issued Conditional Use Permit (CUP) would otherwise expire. The Board of Aldermen originally granted the Conditional Use Permit on September 25th, 2007. The CUP allowed the renovation of the existing 3,200 square foot building and the construction of metal type prefabricated building that is approximately 3,000 square feet in size.

The Board of Aldermen extended the CUP once before and set the new expiration on September 25th, 2010 and then State Bill 831 extended the expiration of this CUP till November 21st, 2013.

The Board of Aldermen extended the CUP for an additional year at with an expiration date of November 21st, 2015.

Upon realizing that the permit expiration date was nearing, staff contacted Mr. Matthews to discuss the possibility of seeking an extension. In a letter submitted to staff regarding this matter, Mr. Matthews cited market conditions and economic factors as reasons why he has not moved forward expeditiously with construction of the project.

Should the Board choose to grant the permit extension request, please note that construction plans must still be reviewed and approved, and a pre-construction meeting must be held before construction may begin.

APPLICABLE LUO PROVISIONS

Extensions to the date on which a permit would otherwise expire must be granted in accordance with Section 15-62 (Expiration of Permits) of the LUO, which is attached for your information. Specifically, please note that Section 15-62(a) of the LUO dictates that the CUP would expire on September 25th, 2009 in this case (i.e.- two years after the date of issuance) because less than ten percent (10%) of the total cost of all construction, erection, alteration, excavation, demolition, or similar work on the development authorized by the permit has been completed on the site. As previously mentioned, Mr. Matthews has been trying to obtain financing, but no work (0%) has been completed on the site to date.

Section 15-62(c) gives the permit-issuing authority (Board of Aldermen) the authority to grant an extension to the date on which the permit would otherwise expire. Section 15-62(c) reads as follows:

“(c) The permit-issuing authority may extend for a period up to two years the date when a permit would otherwise expire pursuant to subsections (a) and (b) if it concludes that (i) the permit has not yet expired, (ii) the permit recipient has proceeded with due diligence and in good faith, and (iii) conditions have not changed so substantially as to warrant a new

application. Successive extensions may be granted for periods up to two years upon the same findings. All such extensions may be granted without resort to the formal processes and fees required for a new permit.”

Staff offers the following information related to the conditions outlined in Section 15-62(c):

1. The permit has not yet expired.

COMPLIANCE: *Yes, it is true that the permit has not yet expired. As previously mentioned, the permit would expire on November 21st, 2015 should an extension not be granted.*

2. The permit recipient has proceeded with due diligence and in good faith.

COMPLIANCE: *Yes, the permit recipient has proceeded with due diligence and in good faith. Mr. Matthews has actively been trying to obtain financing for the project. Due to the economic downturn, Mr. Matthews has been unable to obtain the appropriate financing for the project. Mr. Matthews states in his letter that he has every intention of building the project.*

3. Conditions have not changed so substantially as to warrant a new application.

COMPLIANCE: *Yes, it is true that conditions have not changed so substantially as to warrant a new application. No changes to the property have taken place since the permit was originally approved.*

RECOMMENDATION

The Town Staff recommends that the Board of Aldermen adopt the attached resolution approving the permit extension request. The new expiration date for the permit would be October 20th, 2017.

**A RESOLUTION APPROVING THE EXTENSION OF THE DATE ON WHICH
A CUP WOULD OTHERWISE EXPIRE FOR THE MATTHEW'S FAMILY
BUILDING AT 609 HIGHWAY 54 WEST**

WHEREAS, the Carrboro Board of Aldermen approved a Conditional Use Permit for The Matthew's Family at 609 Highway 54 West on September 25th, 2007; and

WHEREAS, Section 15-62(a) of the Town of Carrboro Land Use Ordinance states that a CUP will expire automatically within two years of the issuance date if less than ten percent (10%) if the total cost of the project has been completed on site, unless the permit-issuing authority extends the expiration date pursuant to the findings found in Section 15-62(c) of the Land Use Ordinance;

WHEREAS, the Board of Aldermen finds, per Section 15-62(c) of the LUO, that: 1.) the CUP has not yet expired 2.) the permit recipient has proceeded with due diligence and good faith, and 3.) conditions have not changed so substantially as to warrant a new application.

NOW, THEREFORE BE IT RESOLVED that the Carrboro Board of Aldermen that the expiration date for The Matthew's Family Building Conditional Use Permit is hereby extended to October 20th, 2017.

This the 20th day of October 2015.



545 Old Farrington Road, Chapel Hill, NC 27517

Phone: 919.929.0203

Fax: 919.929.8566 info@budmatthews.com

October 12, 2015

Town of Carrboro
Planning, Zoning, Inspections Department
301 West Main Street
Carrboro, NC 27510

Attn: Mr. James Thomas

Reference: CUP Extension
Matthews Family Building
Carrboro, NC 27510

Dear Mr. Thomas:

A Conditional Use Permit (CUP) was granted to W3M, LLC on September 27, 2007, in order to develop the Matthews Family Building at 609-611 NC 54 W, Carrboro, NC. Phase 1 of the project consists of remodeling an existing ~3,000 sf structure, constructing a parking lot and associated storm water facilities. In a subsequent phase, a second 3,000sf building will be constructed. Although the construction plans for this project were completed and approved by the Town, the existing CUP will expire because the use authorized by the CUP has not commenced and because less than 10% of the total cost of construction authorized by the CUP has been completed. W3M, LLC, the CUP holder represented by Mr. Raymond (Bud) Matthews, requests that the current CUP, due to expire November 21, 2014 be extended for one year.

As is discussed in the Town of Carrboro, LUO, section 15-62© a CUP may be extended for one year and in additional one-year increments provided three conditions are satisfied. In summary, these conditions are: 1) the existing permit has not expired; 2) the permit recipient has proceeded with due diligence and in good faith; and 3) the conditionals have not changed so substantially as to warrant a new application. These three conditions are satisfied by W3M, LLC on this project. Unfortunately, despite the developers' desire to complete this project, we are waiting for sustainable financial projections and indications that the neighborhood is improving and will then commence with this project as originally planned.

W3M, LLC believes that completion of the Bud Matthews Family Building project will not only be of economic benefit to the Town of Carrboro, but will also provide substantial visual improvement to the Town's western entrance. Please consider and approve this request for a CUP extension of one year.

If additional information is necessary, please do not hesitate to contact W3M, LLC at (919)929-0203.

Respectfully,
W3M, LLC


Raymond (Bud) Matthews



Town of Carrboro

Town Hall
301 W. Main St.
Carrboro, NC 27510

Agenda Item Abstract

File Number: 15-0353

Agenda Date: 10/20/2015

File Type: Agendas

In Control: Board of Aldermen

Version: 1

TITLE:

Permit Extension Request for Previously Issued Conditional Use Permit for The Butler Mixed-Use CUP at 120 Brewer Lane

PURPOSE: The Board is asked to review a request for an extension of the date when a Conditional Use Permit would otherwise expire for The Butler Mixed-Use CUP. The Town Staff recommends approval of the request

DEPARTMENT: Planning

CONTACT INFORMATION: Jeff Kleaveland 919-918-7332

INFORMATION: Kay Richardson, owner of record for the property identified as 120 Brewer Lane (PIN 9778968060) has requested an extension of the date on a previously issued Conditional Use Permit (CUP); this permit which would otherwise expire on January 1st, 2016 (Attachment B1, B2). The Board of Aldermen originally granted the permit on August 26, 2008 (Attachment C). It allows for the construction of a five story mixed use building (which includes 57 residential units, about 22,000 sf of office space and two decks of parking (Attachment B8, B9)). Permit extensions are regulated by Section 15-62 of the LUO. The Board has previously approved three permit extensions for this permit. Granting this extension, per the revised (6/23/15) Section 15-62(c) make the new expiration date January 1st, 2018 (two years). Construction of the project has not commenced though the Main Street Partners are currently pursuing a major modification to the original CUP.

FISCAL & STAFF IMPACT: The applicant has paid the applicable fee associated with this request. No other impact noted

RECOMMENDATION: The Town Staff recommends that the Board of Aldermen adopt the attached resolution (Attachment A) approving the permit extension request. The new expiration date for the permit would be January 1, 2018.

ATTACHMENT A

A RESOLUTION APPROVING AN EXTENSION OF THE DATE ON WHICH A CUP WOULD OTHERWISE EXPIRE FOR THE BUTLER CUP LOCATED AT 120 Brewer Lane

WHEREAS, the Carrboro Board of Aldermen approved a Conditional Use Permit for The Butler Mixed-Use CUP at 120 Brewer Lane (PIN 9778968060) on August 26, 2008; and

WHEREAS, the original CUP expiration date was extended by state legislative action to January 1, 2013 in response to the economic crisis and then, by the Board subsequent to additional extension requests, to the current January 1, 2016 expiration date; and

WHEREAS, the Board of Aldermen finds, per Section 15-62(c) of the LUO, that: 1) the CUP has not yet expired, 2) the permit recipient has proceeded with due diligence and in good faith, and 3) conditions have not changed so substantially as to warrant a new application.

NOW, THEREFORE BE IT RESOLVED by the Carrboro Board of Aldermen that the expiration date for the Butler Mixed-Use CUP is hereby extended to January 1, 2018.

TOWN OF CARRBORO

LAND USE PERMIT APPLICATION



DATE: 10/14/15

FEE: \$350

APPLICANT: Main Street Properties of Chapel Hill LLC		OWNER: Kay Richardson	
ADDRESS PO Box 2152		ADDRESS: 8 Kendall Dr.	
CITY/STATE/ZIP Chapel Hill, NC 27515		CITY/STATE/ZIP Chapel Hill, NC 27517	
TELEPHONE/EMAIL: PHONE: 919-923-4343 EMAIL: laura@300eastmain.com		TELEPHONE/EMAIL: PHONE: 919-942-4800 EMAIL: krichardson@nc.rr.com	
LEGAL RELATIONSHIP OF APPLICANT TO PROPERTY OWNER: option holder		PIN: 9778-96-8060	
PROPERTY ADDRESS: 120 Brewer Lane		PROPOSED LAND USE & USE CLASSIFICATION:	
PRESENT LAND USE & USE CLASSIFICATION:		LOT AREA: 0.96 Acres Square Feet	
ZONING DISTRICT(S) AND AREA WITHIN EACH (including Overlay Districts): B-1(c)(conditional use)			
# OF BUILDINGS TO REMAIN		# OF BUILDINGS PROPOSED	
EXISTING GROSS FLOOR AREA OF BUILDING(S) square feet	GROSS FLOOR AREA (of proposed BUILDING / proposed ADDITION) square feet	AMOUNT OF IMPERVIOUS SURFACE / proposed square feet	

NAME OF PROJECT/DEVELOPMENT: _____

TYPE OF REQUEST	**INFORMATION REQUESTED (Refer to Attached Key)
SUBDIV. FINAL PLAT / EXEMPT PLAT	1, 18, 19, 21, 23, 31, 33, 34, 38
CONDITIONAL USE PERMIT (CUP)	1, 2, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 32, 34, 35, 36, 37, 38
CUP MODIFICATION	SAME AS CONDITIONAL USE PERMIT (CUP)
SPECIAL USE PERMIT (SUP)	1, 3, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 32, 34, 35, 36, 37, 38
SUP MODIFICATION	SAME AS SPECIAL USE PERMIT (SUP)
ZONING PERMIT (Project)	1, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 22, 23, 24, 25, 26, 27, 29, 30, 32, 34, 35, 36, 37, 38
ZONING PERMIT (Building) Residential Infill & Additions	9, 10, 22, 24, 34, 37 (also see "Building Permit Review - Residences Only" checklist)
SIGN PERMIT	1, 10, 13, 14, 17, 20, 38
VARIANCE	4, 5, 10, 20, 29, 34, 38, Attachment A
APPEAL	4, 5, 38, Attachment B
SPECIAL EXCEPTION	1, 4, 5, 8, 10, 20, 35, Attachment C

APPLICANT: Shyler MANSI, Pres. MCA DATE: 10-13-15

OWNER: Kay Richardson DATE: 10-13-15

Kay Richardson
8 Kendall Dr.
Chapel Hill, NC 27517
919-942-4800
krichardson@nc.rr.com

10/13/15

Marty Roupe
Development Review Administrator
Town of Carrboro
301 W. Main St.
Carrboro, NC 27510

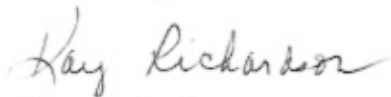
Dear Mr. Roupe:

This letter serves as a request for a one-year extension of the conditional-use permit issued for The Butler, 120 Brewer Lane, which without extension expires Jan. 1, 2016.

I am proceeding with due diligence and in good faith toward using the property in accordance with the CUP. Main Street Properties of Chapel Hill LLC has a pending application to revise the existing permit and hopes to begin construction on the new Hilton Garden Inn in 2016.

Please let me know if you have any questions or require additional information.

Yours truly,

A handwritten signature in cursive script that reads "Kay Richardson".

Kay Richardson

MM



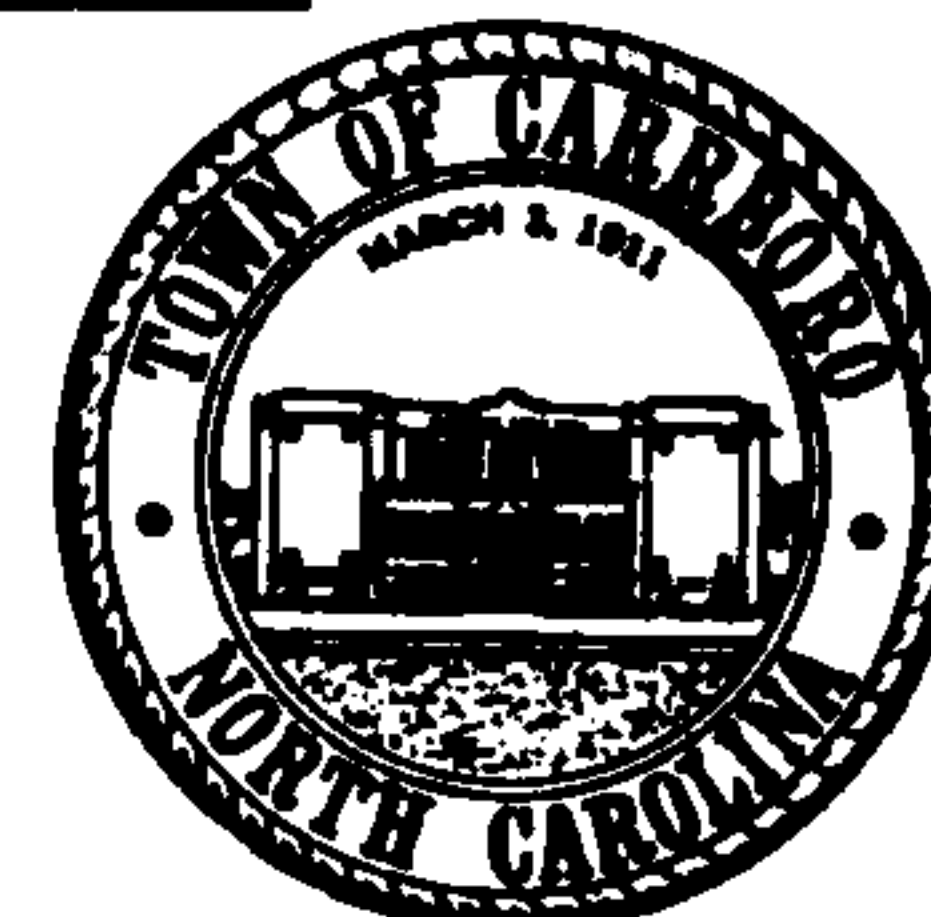
20081022000250430 PRMIT
Bk:RB4618 Pg:473
10/22/2008 01:25:25 PM 1/5

M
LB

FILED Joyce H. Pearson
Register of Deeds, Orange Co, NC
Recording Fee: \$26.00
NC Real Estate TX: \$.00

LS

PREPARED BY AND RETURN TO:
TOWN CLERK
TOWN OF CARRBORO
301 West Main Street
CARRBORO, NORTH CAROLINA 27510



ORANGE COUNTY NORTH CAROLINA

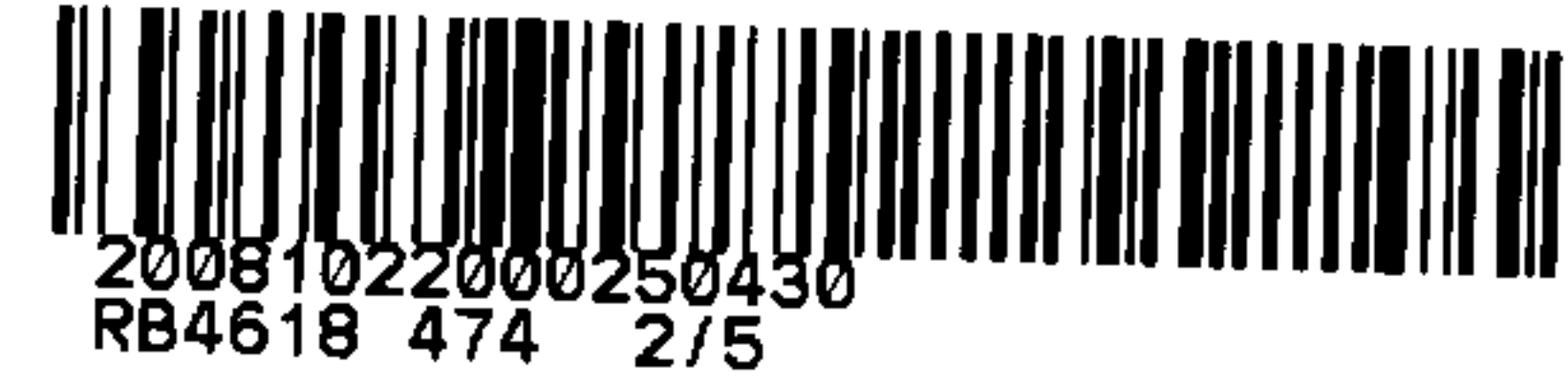
TOWN OF CARRBORO CONDITIONAL USE PERMIT GRANTED The Butler Mixed Use Building

On the date(s) listed below, the Board of Aldermen of the Town of Carrboro met and held a public hearing to consider the following application:

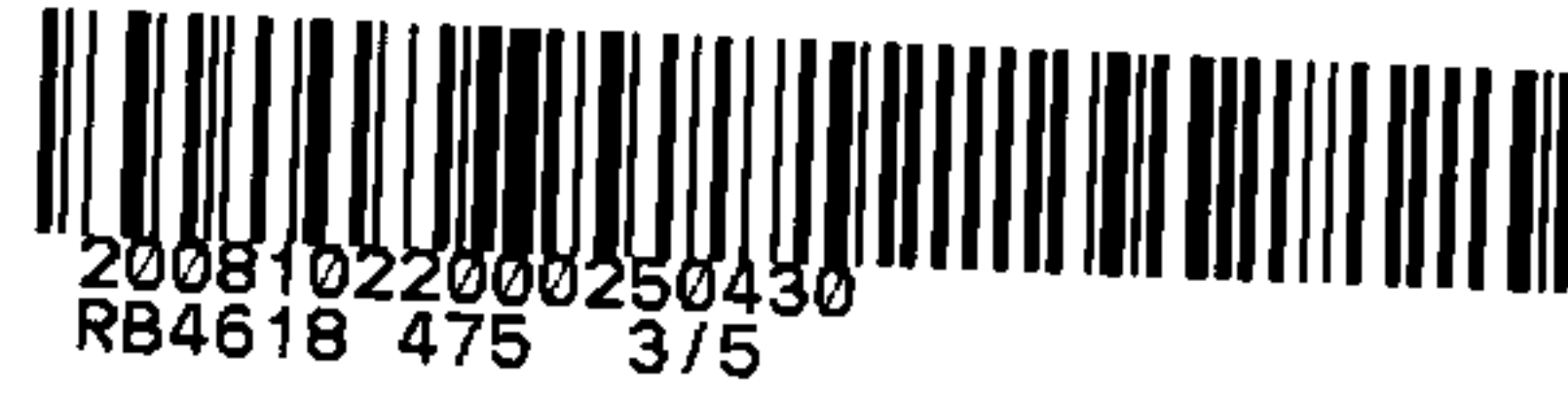
APPLICANT: Downtown Urban Ventures, LLC and Edwin Andrews Properties, Inc.
OWNERS: Downtown Urban Ventures, LLC and Edwin Andrews Properties, Inc.
PROPERTY LOCATION (Street Address): 120 Brewer Lane
TAX MAP, BLOCK, LOT(S): 7.92.A.22 9778-96-8060
PROPOSED USE OF PROPERTY: Construction of a five-story mixed use building.
CARRBORO LAND USE ORDINANCE USE CATEGORY: Building Site: 27.000, Combination Use including: 1.310, 3.110, 3.120, 3.130, 3.150, 3.210, 3.220, 3.250
MEETING DATES: June 24 and August 26, 2008

Having heard all the evidence and arguments presented at the hearing, the Board finds that the application is complete, that the application complies with all of the applicable requirements of the Carrboro Land Use Ordinance for the development proposed, and that therefore the application to make use of the above-described property for the purpose indicated is hereby approved, subject to all applicable provisions of the Land Use Ordinance and the following conditions:

1. The applicant shall complete the development strictly in accordance with the plans submitted to and approved by this Board, a copy of which is filed in the Carrboro Town Hall. Any deviations from or changes in these plans must be submitted to the Development Review Administrator in writing and specific written approval obtained as provided in Section 15-64 of the Land Use Ordinance.
2. If any of the conditions affixed hereto or any part thereof shall be held invalid or void, then this permit shall be void of no effect.



3. That no size-limited unit may be enlarged for one year after issuance of a certificate of occupancy.
4. That the applicant make a payment-in-lieu of affordable housing for four (4) of the nine (9) proposed affordable units in the amount not to exceed \$100,000 per unit to be paid to the Town of Carrboro's Affordable Housing Special Review Fund, and that the remaining five (5) affordable dwellings provided be, at a minimum, one-bedroom units.
5. That a fee in-lieu of recreation points equivalent to 44.93 points @ \$186.98 per point, or \$8,401.00 (subject to fee change on July 1, 2008) be paid to the Town of Carrboro prior to construction plan approval.
6. That the trellis facility in the courtyard is equipped with outdoor furniture (tables, chairs, benches, etc.) sufficient to adequately serve the residents of the building, per the submitted rendering (Attachment E-2).
7. That prior to construction plan approval, the applicant provide to the Town of Carrboro evidence of a shared access easement (or equivalent) agreed upon by the owners of the 110 Brewer Lane mixed-use project so as to secure access to the proposed project at 120 Brewer Lane and that said easement will be shown and referenced on any plat associated with the project.
8. That the applicant be allowed to deviate from the presumptive parking standard requirement 149 spaces by providing 136 spaces based upon their written justification that anticipates shared use of spaces between business and residential uses (Attachment G).
9. That the applicant must receive a Town of Carrboro driveway permit for Brewer Lane prior to construction plan approval (if found to be necessary).
10. That, per the provisions of Section 15-309 of the Carrboro Land Use Ordinance, the screening requirements of Section 15-308 are waived as they do not create a substantial benefit to the adjacent properties and because the project is to be rezoned to B-1(c), which has no setback requirements, based upon the applicant's screening justification letter (Attachment I).
11. That screening gates be provided for the proposed dumpster (on 110 Brewer Lane) to prevent views of the dumpster from the south, while still allowing access as needed.
12. That, prior to approval of any plat submitted for the project, a maintenance agreement for stormwater facilities used jointly by the owners of the 110 and 120 Brewer lane be approved by the Town Attorney and addressed in the condominium owners association documents.
13. That the applicant shall provide to the Carrboro Zoning Division, prior to the recordation of the final plat for the project or before the release of a bond if some features are not yet in place at the time of the recording of the final plat, Mylar and digital as-builts for the stormwater features of the project. Digital as-builts shall be in DXF format and shall include a base map of the whole project and all separate plan sheets. As-built DXF files shall include all layers or tables containing storm drainage features. Storm drainage features will be clearly delineated in a data table. The data will be tied to horizontal controls.
14. That the developer shall include a detailed stormwater system maintenance plan specifying responsible entity and schedule. The plan shall include scheduled maintenance activities for each unit in the development (including cisterns, bio-retention areas, swales, check dams, and irrigation pond, performance evaluation protocol, and frequency of self-reporting requirements, including a proposed self-reporting form) on maintenance and performance. The plan and supporting documentation shall be submitted to the Town of Carrboro engineer and Environmental Planner for approval prior to construction plan approval. Upon approval, the plans shall be included in the homeowners' association documentation.



15. That prior to construction plan approval, the applicant gain written permission from the UNC Property Office to access their site via the Libba Cotton Bikeway so as to perform work necessary to implement the approved plan.
16. That prior to construction plan approval, a construction traffic management plan be approved by the Town of Carrboro addressing the project's impact during construction on both the Libba Cotton Bikeway and the surrounding streets.
17. That prior to issuance of the Certificate of Occupancy, if it is deemed necessary by the Carrboro Fire Department, the applicant replace the existing bollards on the Libba Cotton bikeway (the ones that directly affect emergency access to the new building) with improved, removable or collapsible bollards.
18. That prior to construction plan approval, the design for the landscape island on the east side of the building be shortened as necessary to facilitate movement of solid waste and recycling trucks, as recommended by Orange County Solid Waste.
19. That prior to construction plan approval, a shared-use and maintenance easement between the owners of 110 and 120 Brewer Lane be approved by the Town Attorney and recorded regarding the solid waste facility arrangement for the two properties.
20. That prior to issuance of the Certificate of Occupancy, the applicant provide evidence that they have fulfilled the relevant terms, provisions and requirement of their recorded Brownfield Agreement with NCDENR.
21. That the applicant must obtain all necessary temporary and permanent easements prior to construction plan approval.
22. That condominium owner's association documents are approved by the Carrboro Town Attorney prior to issuance of the Certificate of Occupancy.
23. That the applicant receive(s) CAPS from the Chapel Hill-Carrboro City Schools district pursuant to Article IV, Part 4 of the Carrboro Land Use Ordinance prior to construction plan approval.
24. That if Orange Community Housing and Land Trust is unable to sell any affordable unit within one year of the date it receives a certificate of occupancy, Downtown Urban Ventures, or its successors or assigns, will be released from its obligation to sell that unit to OCHLT and may instead provide to the Town of Carrboro a payment-in-lieu of providing an affordable unit, consistent with the applicable related Carrboro Land Use Ordinance language.
25. That prior to construction plan approval, the applicant must prepare, and the Town Manager accept, a three-party agreement between the future owner's association, Orange Community Housing and Land Trust, and the Town of Carrboro. The agreement must: 1) stipulate that either the Land Trust or the Town must verify compliance with the applicable provisions of the conditional use permit and Land Use Ordinance relating to affordable housing prior to the sale/resale of any affordable unit; 2) establish and implement a 1% transfer fee program wherein market-rate units will subsidize affordable units within the development; and 3) stipulate that the owner's association covenants must include language regarding the affordable units and properly disclose related information to purchasers of market-rate units information regarding the 1% transfer fee program. Details regarding this condition must be presented to and approved by the Carrboro Town Attorney and Town Manager prior to construction plan approval. Monies collected in the affordable housing transfer fee program, associated with the sale/resale of properties, are to be placed into a fund for the specific purpose of paying condominium and townhome owner's association dues for persons who acquire affordable housing.
26. That the applicant fulfill their agreements as listed in Attachment E-1 (Summary Actions Agreed to by the Applicant Relative to Advisory Board Recommendation), with the revision of #17 to require the pedestrian connection to the north from the courtyard be handicap accessible.



27. That the developer will post in a prominent location on the building site, a contact number for the public to call to report concerns. The contact should be available at all times.

This permit shall automatically expire within two years of the date of issuance if the use has not commenced or less than 10 percent (10%) of total cost of construction has been completed or there has been non-compliance with any other requirements of Section 15-62 of the Carrboro Land Use Ordinance.

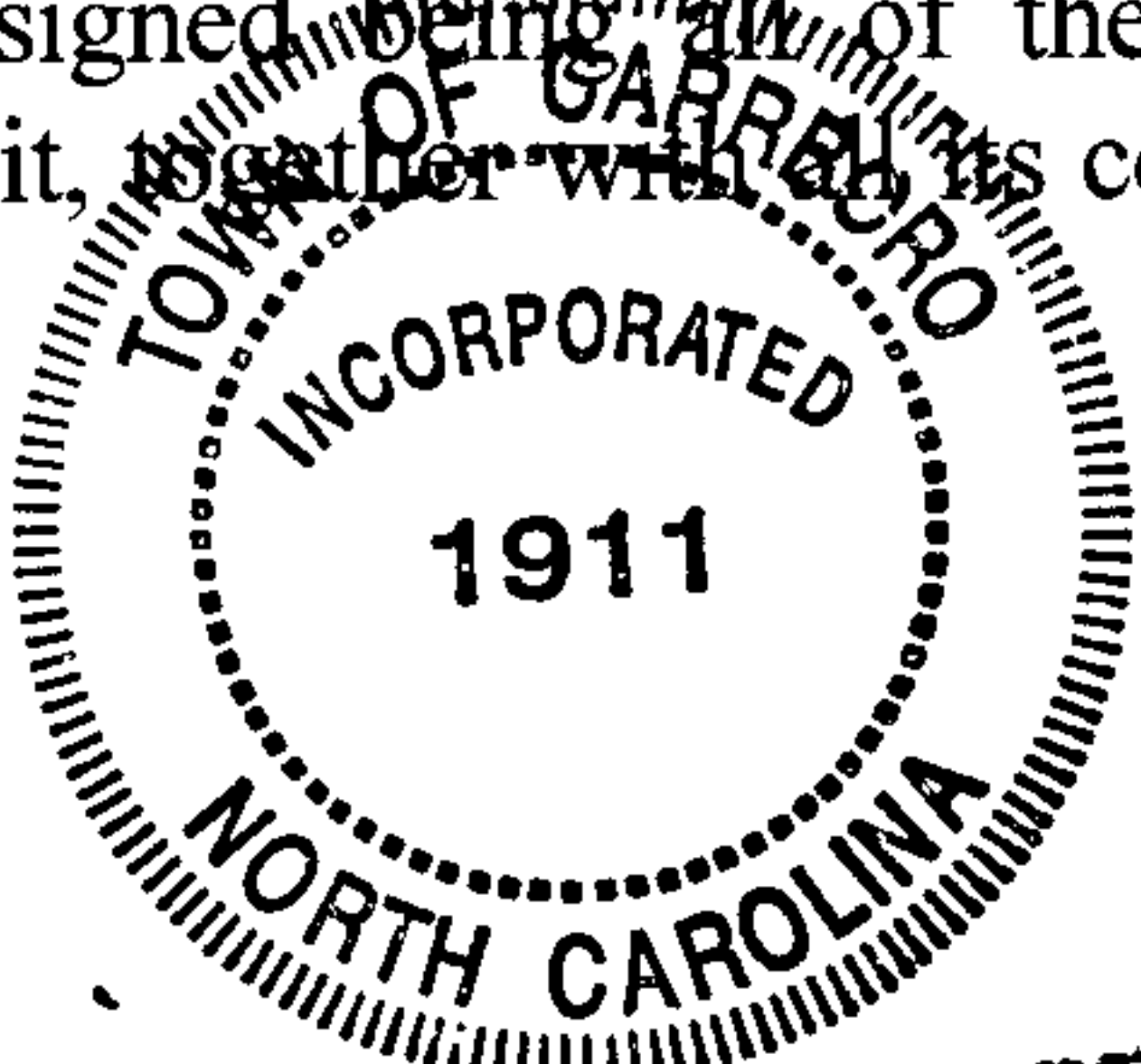
All street construction on those streets proposed for acceptance by the Town of Carrboro shall be certified by an engineer. Engineering certification is the inspection by the developer's engineer of the street's subgrade, base material, asphalt paving, sidewalks and curb and gutter, when used. The developer's engineer shall be responsible for reviewing all compaction tests that are required for streets to be dedicated to the town. The developer's engineer shall certify that all work has been constructed to the town's construction specifications.

If this permit authorizes development on a tract of land in excess of one acre, nothing authorized by the permit may be done until the property owner properly executes and returns to the Town of Carrboro the attached acknowledgment of the issuance of this permit so that the town may have it recorded in the Orange County Registry.

NORTH CAROLINA

ORANGE COUNTY

IN WITNESS WHEREOF, the Town of Carrboro has caused this permit to be issued in its name, and the undersigned, being all of the property above described, do hereby accept this Conditional Use Permit, together with all its conditions, as binding upon them and their successors in interest.



THE TOWN OF CARRBORO

ATTEST:

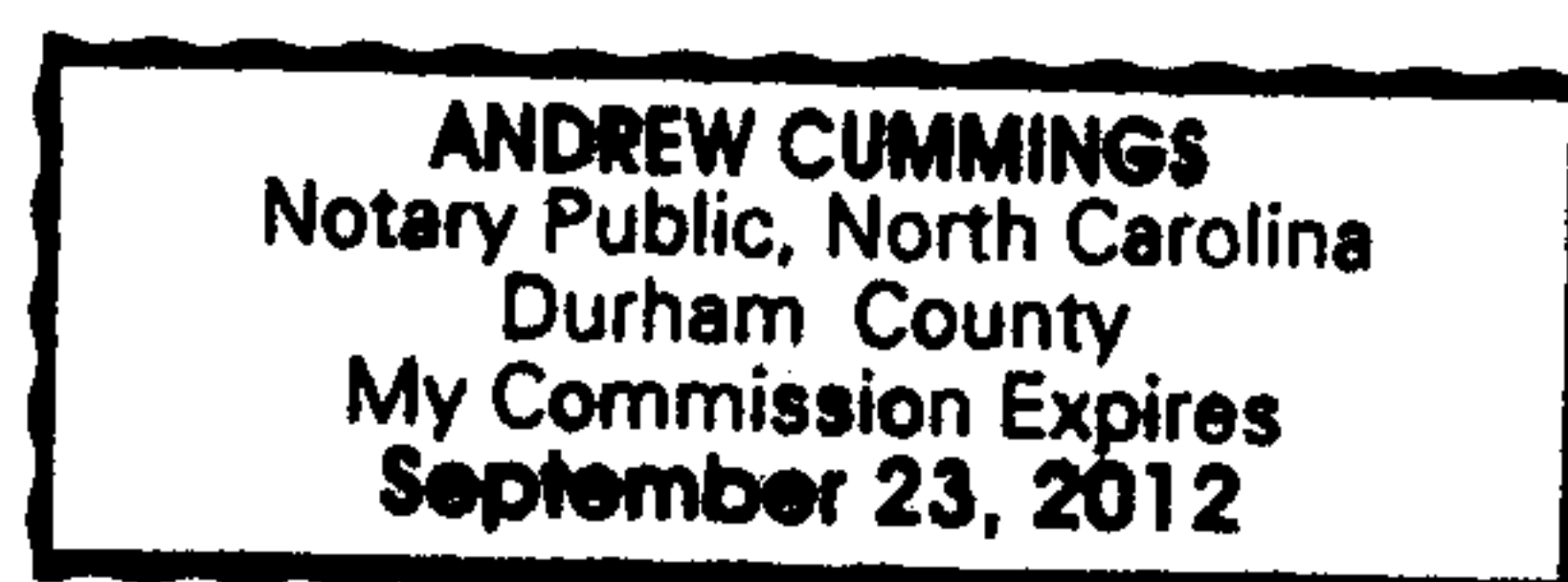
Sarah C. Williamson (SEAL)
Town Clerk

BY Steve Stewart
Town Manager

I, ANDREW CUMMINGS, a Notary Public in and for said County and State, do hereby certify that Sarah C. Williamson, Town Clerk for the Town of Carrboro, personally came before me this day and being by me duly sworn says each for himself that she knows the corporate seal of the Town of Carrboro and that the seal affixed to the foregoing instrument is the corporate seal of the Town of Carrboro, that Steven E. Stewart, Town Manager of said Town of Carrboro and Sarah C. Williamson, Town Clerk for the Town of Carrboro subscribed their names thereto; that the corporate seal of the Town of Carrboro was affixed thereto, all by virtue of a resolution of the Board of Aldermen, and that said instrument is the act and deed of the Town of Carrboro.

IN WITNESS THEREOF, I have hereunto set by hand and notarial seal this the 7th day of OCTOBER, 2008.

(SEAL)



Andrew Cummings
Notary Public

My Commission Expires: 9/23/2012



IN TESTIMONY WHEREOF, the undersigned Limited Liability Partnership Grantor has caused this instrument to be executed in the appropriate partnership name by the duly authorized general partner, and has adopted as its seal the word "Seal" appearing beside its name and their signature(s), this sealed instrument being executed and delivered on the date first above written.

(SEAL)

DOWNTOWN URBAN VENTURES, LLC

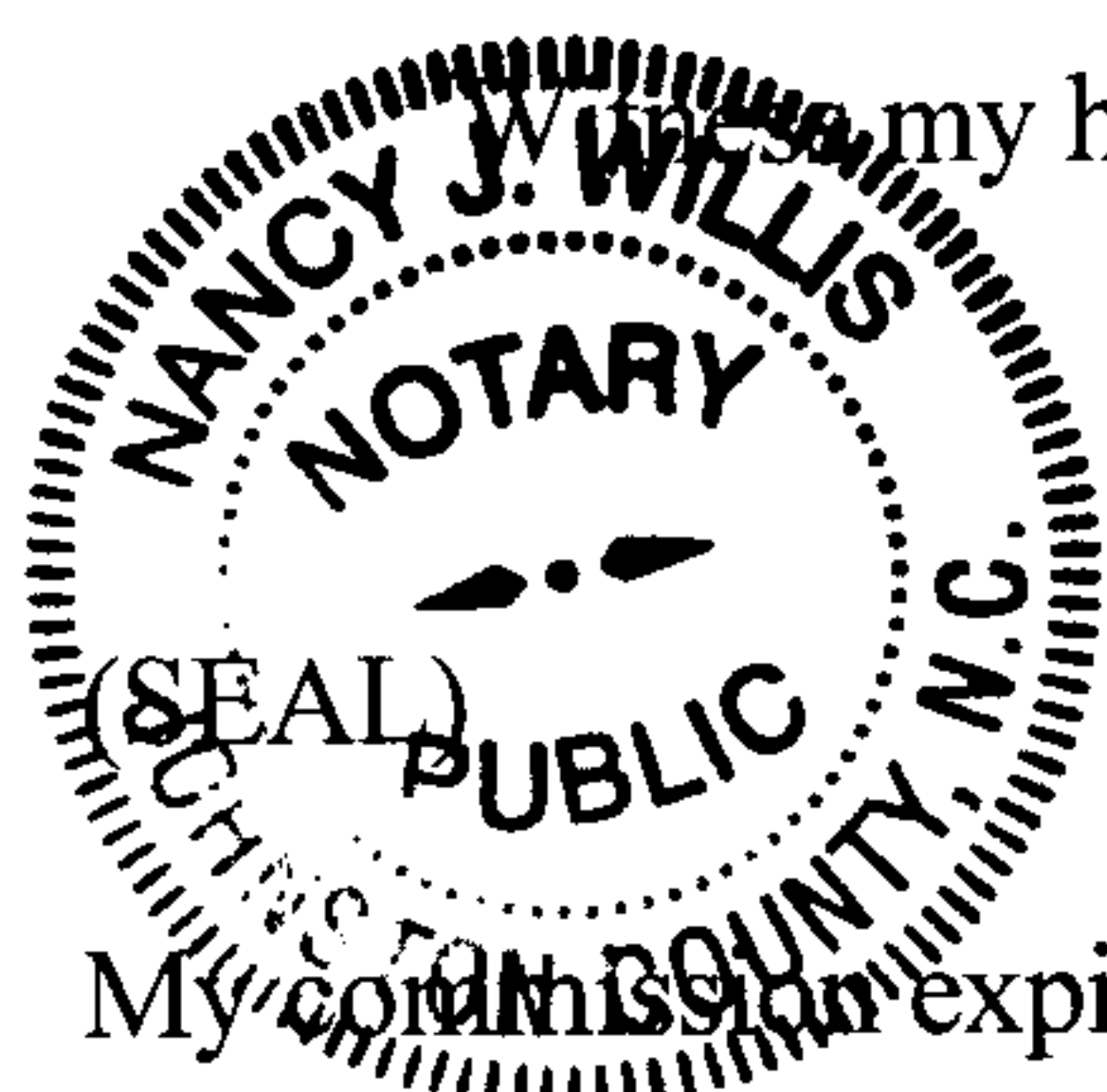
By: _____

Title: _____

North Carolina (STATE)

Wake (COUNTY)

I, Nancy J. Willis, a Notary Public of the County and State aforesaid, certify that Richard W. Gaylor, Jr personally appeared before me this day and acknowledged that he is Member/Manager of Carr Mill Limited Partnership, and that by authority duly given and as the act of the limited partnership, the foregoing instrument was signed in its name by him as Member/Manager on behalf of the limited partnership as Member/Manager thereof all by authority duly given.



My hand and official seal, this 29th day of September, 2008.

Nancy J. Willis
Notary Public

My commission expires: 10/30/09

Attest: _____
Secretary (SEAL)

EDWIN ANDREWS PROPERTIES, INC.

BY _____

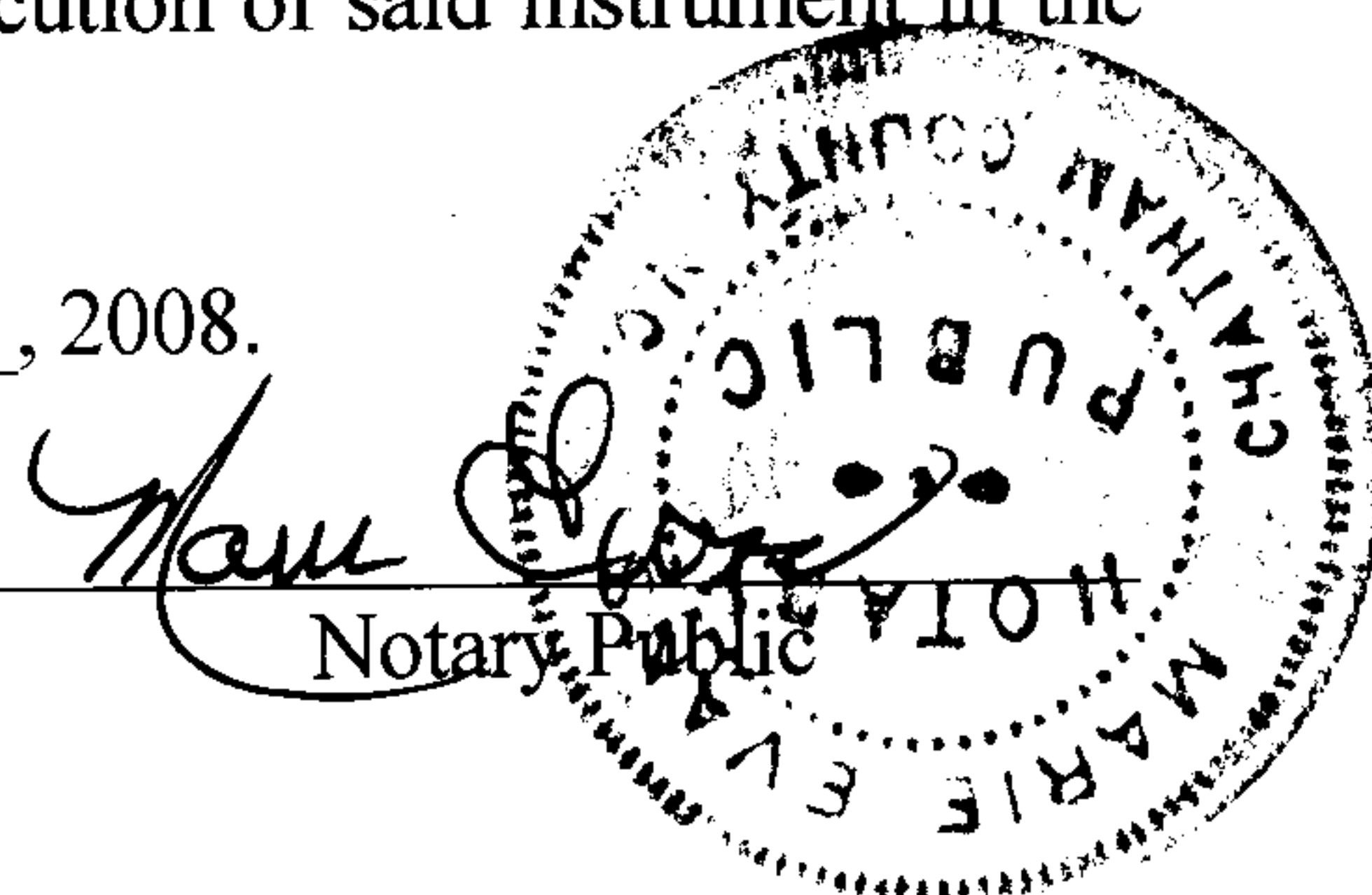
me President

NORTH CAROLINA
ORANGE COUNTY

I, Marie Evans, a Notary Public of Chatham County, N.C. do hereby certify that Donald Whittier appeared before me this day and being duly sworn says that he/she knows the common seal of Edwin Andrews Properties, Inc., and is acquainted with Donald Whittier who is Secretary of said corporation and he/she, Donald Whittier who is Secretary of said corporation, saw the said ^{vice} President sign the foregoing instrument and that he/she, Donald Whittier, Secretary as aforesaid, affixed said seal of said instrument and he/she, the said Secretary, signed his/her name in attestation of execution of said instrument in the presence of said ^{vice} President of said corporation.

Witness my hand and notarial seal, this the 25 day of Sept., 2008.

My Commission Expires: 4-28-2013





Town of Carrboro

Town Hall
301 W. Main St.
Carrboro, NC 27510

Agenda Item Abstract

File Number: 15-0360

Agenda Date: 10/20/2015

File Type: Agendas

In Control: Board of Aldermen

Version: 1

TITLE:

Request to Make an Appointment to the Planning Board

PURPOSE: The purpose of this agenda item is for the Mayor and Board to make an appointment to the Planning Board.

DEPARTMENT: Town Clerk

CONTACT INFORMATION: Cathy Wilson, 919-918-7309

INFORMATION: The Planning Board currently has two seats available for appointment and only one application. The chair of the Planning Board has provided the recommendation form for review. A resolution for appointment is attached.

FISCAL & STAFF IMPACT: N/A

RECOMMENDATION: It is recommended that the Mayor and Board adopt the attached resolution.

ATTACHMENT A

**A RESOLUTION MAKING APPOINTMENT(S) TO THE
PLANNING BOARD**

Section 1: THE BOARD OF ALDERMEN HEREBY APPOINTS THE FOLLOWING
APPLICANT(S) TO THE PLANNING BOARD:

Seat Designation	Appointee	Term Expiration
In-Town	Hathaway Pendergrass	2/2018

Section 2. This resolution shall become effective upon adoption.

To Board Chairs: Please summarize applications as received; contact each applicant for any update one year after last contact; when positions are open, invite each applicant to attend a board meeting prior to making a recommendation.

ADVISORY BOARD NAME: PLANNING BOARD

Name: HATHAWAY PENDERGRASS
Date of application/last contact: 10-1-15

Summary of qualifications:

MR. PENDERGRASS IS AN ATTORNEY, VICE PRESIDENT
ORANGE COUNTY RAPE CRISIS CENTER

Advisory Board Chair reconfirmed applicant's interest in serving by phone or e-mail.

☒ Yes ☐ No (Briefly explain: _____)

Applicant attended Advisory Board meeting prior to BOA review.

☒ Yes (Date: 10-1-15) ☐ No (Briefly explain: _____)

Applicant has demonstrated a clear understanding of the time commitment, roles and responsibilities of serving on the Advisory Board.

☒ Yes ☐ No
Briefly explain: _____

In addition to your comments above, please check other qualities that the applicant offers that would help the Advisory Board meet its goals for community representation. Please note that candidates who do not meet any of these qualities are still eligible for appointment. Please communicate any urgent needs and priorities for Advisory Board composition to your Board of Aldermen Liaison.

☒ Gender diversity

RECEIVED
OCT 07 2015

To Board Chairs: Please summarize applications as received; contact each applicant for any update one year after last contact; when positions are open, invite each applicant to attend a board meeting prior to making a recommendation.

ADVISORY BOARD NAME: PLANNING BOARD

☐ Racial or ethnic diversity

☒ Age range diversity

☐ Neighborhood/geographic diversity

☐ Occupation, experience or special skills

☒ Previous public service or community involvement

☐ Other: _____

To Board Chairs: Please summarize applications as received; contact each applicant for any update one year after last contact; when positions are open, invite each applicant to attend a board meeting prior to making a recommendation.

ADVISORY BOARD NAME: Planning Board

☐ Racial or ethnic diversity

☒ Age range diversity

☐ Neighborhood/geographic diversity

☐ Occupation, experience or special skills

☒ Previous public service or community involvement

☐ Other: _____

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☒ Yes ☐ No (Briefly explain: _____)

Applicant attended Advisory Board meeting prior to BOA review.

☒ Yes (Date: 10-1-15) ☐ No (Briefly explain: _____)

Applicant has demonstrated a clear understanding of the time commitment, roles and responsibilities of serving on the Advisory Board.

☒ Yes ☐ No
Briefly explain: _____

In addition to your comments above, please check other qualities that the applicant offers that would help the Advisory Board meet its goals for community representation. Please note that candidates who do not meet any of these qualities are still eligible for appointment. Please communicate any urgent needs and priorities for Advisory Board composition to your Board of Aldermen Liaison.

☒ Gender diversity

RECEIVED

OCT 07 2015

To Board Chairs: Please summarize applications as received; contact each applicant for any update one year after last contact; when positions are open, invite each applicant to attend a board meeting prior to making a recommendation.

ADVISORY BOARD NAME: Phonix Board
Applicant(s) recommended at this time (1 per open seat)

Applicant 1: HALHAWAY PENDERGRASS

Outstanding qualifications: ATTORNEY, WORK WITH EPT, W9 AND
HACKNEY

How applicant compliments current board composition:

Other comments: will be a new experience with youth
to the board

Applicant 2: _____

Outstanding qualifications: _____

How applicant compliments current board composition:

Other comments:

Applicant 3:

Outstanding qualifications:

How applicant compliments current board composition:

From: noreply@civicplus.com [mailto:noreply@civicplus.com]
Sent: Thursday, September 17, 2015 2:36 PM
To: Catherine Wilson
Subject: Online Form Submittal: Advisory Board Application

Advisory Board Application

Name	Hathaway Pendergrass
Date	9/17/2015
Address1	1005 West Main Street
Address2	<i>Field not completed.</i>
City	Carrboro
State	NC
Zip	27510
Is this address located within the corporate limits of the Town of Carrboro?	Yes
Telephone	9193020144
Email Address	hspendergrass@gmail.com
Date of Birth	1/10/1984
Race	White
Sex	Male
Occupation	Attorney
Are you a registered Orange County Voter?	Yes

Length of Residence in Orange County	31 years
Length of Residence in the Town of Carrboro	28 years
I wish to be considered for appointment to the following committee/board(s):	Planning Board
Other (advisory board not listed):	<i>Field not completed.</i>
Advisory Board Preference	<i>Field not completed.</i>
*Employer/Self Employed	Epting and Hackney
Number of Years Employed	3
* Provide examples of how your are involved in the promotion of travel and tourism in the Town of Carrboro.	<i>Field not completed.</i>
Community Activities/Organizational Memberships	Orange County Rape Crisis Center - Vice President (President Elect) 15B Bar Association - Vice President Volunteers For Youth - Teen Court Judge Orange County Democratic Party - Lions' Club Precinct Chair Carrboro Farmers' Market - Volunteer Attorney
Experience to Aid You in Working on Advisory Boards	Lifelong Orange County and Carrboro resident. I have been a witness to the amazing growth in Carrboro over the past three decades. As an attorney, I'm able to hone my critical thinking and analytical skills on a daily basis, of which I plan to put-to-practice on the Planning Board.
Reasons You Wish to be Appointed	I love Carrboro . I want to have a more active role in the development and future of our wonderful town.
Have you ever served on any Town of Carrboro	No

Committee or Board?

If yes, which one(s)?	<i>Field not completed.</i>
-----------------------	-----------------------------

Are you currently serving on a Town Board or Committee?	No
---	----

If yes, are you applying for a third consecutive term?	No
--	----

If yes, please describe how you meet one, or more, of the following exceptions noted below.	N/A
---	-----

Email not displaying correctly? [View it in your browser.](#)



Town of Carrboro

Town Hall
301 W. Main St.
Carrboro, NC 27510

Agenda Item Abstract

File Number: 15-0357

Agenda Date: 10/20/2015

File Type: Agendas

In Control: Board of Aldermen

Version: 1

TITLE:

Presentation from the North Carolina League of Municipalities Regarding Issues from the 2015 Session of the North Carolina General Assembly

PURPOSE: The purpose of this item is to hear a presentation from Erin Wynia, the NCLM Legislative and Regulatory Issues Manager regarding an update from the recently adjourned 2015 Session of the NC General Assembly.

DEPARTMENT: Town Clerk

CONTACT INFORMATION: Cathy Wilson

INFORMATION: Erin Wynia will provide an update to the Board of Aldermen and be available for questions.

FISCAL & STAFF IMPACT: N/A

RECOMMENDATION: Town staff recommends that the Board receive the report.



Town of Carrboro

Town Hall
301 W. Main St.
Carrboro, NC 27510

Agenda Item Abstract

File Number: 15-0350

Agenda Date: 10/20/2015

File Type: Agendas

In Control: Board of Aldermen

Version: 1

TITLE:

Update on the Rogers Road Sewer Project, Proposed Utility District, Community Outreach and Interlocal Agreement

PURPOSE: The purpose of this agenda item is to provide the Board of Aldermen an opportunity to receive information and discuss the status of the Rogers Road Sewer Project, Community Outreach, and Management and Funding.

DEPARTMENT: Planning

CONTACT INFORMATION: Patricia McGuire - 919-918-7327; pmcguire@townofcarrboro.org

INFORMATION: This update seeks to provide the Board of Aldermen with information on the status of surveying work, engineering design and permitting of the Rogers Road sewer project, the community outreach/community first planning effort, and the framework and requirements for the proposed utility district. A draft interlocal agreement for cost-sharing has been prepared. Input from the Board of Aldermen on the provisions of the agreement and the water and sewer utility district is being sought at this time.

Engineering and Community Outreach. Work on the Rogers Road sewer project has continued since the Board's last report on June 2nd. Following execution of an interlocal agreement between Orange County and OWASA, the services of AECOM were secured to design and prepare permit applications for the project. Mary Darr, OWASA's Director of Planning and Engineering has prepared a project update (*Attachment B*) and will be in attendance to provide additional information and respond to any questions. In mid-July, Orange County executed an agreement with the Marion Cheek Jackson Center which, in partnership with the Rogers-Eubanks Neighborhood Association, will provide support for outreach and engagement and to facilitate a community first planning effort (as described in the project outline attached to the interlocal agreement between Orange County and the Jackson Center). Copies of the agreements between these two entities and Orange County are included as *Attachments C and D*. On July 28th, a community meeting was held at the Rogers Road Community Center to announce that surveying work for the engineering design would be starting in August. Over seventy people were in attendance. The meeting agenda and summary are included as *Attachments E and F*. A summary report on the community outreach and engagement that has taken place to date is also provided as *Attachment G*. Town and County staff have been meeting regularly for nearly a year and weekly since the summer to coordinate effort on the project.

Interlocal agreement. Board approval of funding for last year's preliminary engineering and outreach

Agenda Date: 10/20/2015

File Type:Agendas

In Control: Board of Aldermen

Version: 1

occurred in March and April 2014. The town's share of those activities totaled \$25,200. The draft interlocal agreement in preparation at that time was not finalized. In April 2015, as OWASA considered the interlocal agreement that would authorize design and permitting to go forward (*Attachment C*, noted above), the Board of Aldermen adopted a resolution stating its intentions and expectations regarding cost-sharing. As part of its annual report from OWASA board members, the Board of Aldermen received an update on the work on June 2nd. Links to the Town website-archived agenda materials are provided in the table below

Date	Agenda
9/17/2013	https://carrboro.legistar.com/MeetingDetail.aspx?ID=261233&GUID=CFEE98FD-3143-4E94-BD6C-2182EBDA242D&Options=&Search= (copy of Historic Rogers Road Neighborhood Task Force Final Report available at this link)

9/16/2014

<https://carrboro.legistar.com/LegislationDetail.aspx?ID=1907133&GUID=3C32E9F9-849A-49E4-B05D-DE8A562D0983&Options=ID%7CText%7CAttachments%7C&Search=sewer&FullText=1>

https://carrboro.legistar.com/LegislationDetail.aspx?ID=2280167&GUID=90FD88E3-30A5-4A23-9BFE-6D5FC752EECE&Options=ID Text Attachments &Search=sewer	
April 21, 2015	https://carrboro.legistar.com/LegislationDetail.aspx?ID=2265712&GUID=1A57B711-13F3-44D5-A90B-BE498EB6C61A&Options=ID Text &Search=rogers+road
June 2, 2015	https://carrboro.legistar.com/LegislationDetail.aspx?ID=2324671&GUID=240C977A-EA65-4AB6-A979-5E96F670E1BB&Options=ID Text Attachments &Search=sewer

An updated draft interlocal agreement that proposes a framework for the Town of Chapel Hill and the Town of Carrboro to reimburse Orange County for a portion of the costs of the project has been prepared (*Attachment A*). The agreement includes preliminary engineering and outreach (Phase 1), previously specified in the draft considered in 2014 as totaling \$25,200, cost sharing for the community center, engineering/design/permitting and community outreach (Phase II) related to the sewer project, and community first planning. The staff is seeking input from the Board of Aldermen on the agreement and highlights the following provisions for the Board's consideration.

- 1) Reference to agreement in principle related to community planning (page 2, fourth “Whereas” statement). The Board of Aldermen has had limited discussions on community planning related to this project.
- 2) The costs specified in the agreement total \$1,334,900. Consistent with the Historic Rogers Road Neighborhood Task Force (HRRNTF) recommendations and previous action of the Board of Aldermen, Carrboro’s share is proposed to be 14 percent of the total, \$186,886. Per previous action, such expenses are expected to be paid out of the current \$900,000 appropriation.
- 3) The payment responsibility for the Town of Chapel Hill is proposed to be 43 percent of the total, also consistent with the HRRNTF recommendations. The payment is further described as being assigned to cover costs of the Community Center, so long as it does not exceed the total cost.
- 4) Reference to the Towns’ participation in the work of OWASA and the Jackson Center is not yet included. The County’s work with OWASA and the Jackson Center, reflecting the contractual arrangements already in place, is noted.

Water and Sewer District. The proposed framework for payment of construction costs, management, and debt service is a utility district. A memo from the County and Town managers described the approach (*Attachment H*). The County Commissioners had a worksession with bond counsel, Bob Jessup, on the creation of a water/sewer district as a financing tool for getting sewer to the Rogers Road area. The agenda materials from the meeting may be found at this link:

http://www.orangecountync.gov/document_center/BOCCAgendaMinutes/151013.pdf .

Residents of the HRRNTF parcels located within Carrboro and additional nearby lots that are expected to also be able to connect (in the future) to the sewer system under design were notified of this meeting and invited to attend and listen to the Board’s discussion.

FISCAL & STAFF IMPACT: The Board of Aldermen has appropriated \$900,000 for the Town’s share of this project. This is sufficient to cover the project costs identified so far in the draft interlocal agreement. A detailed breakdown of all costs will be provided when the final version of the interlocal agreement is presented for the Board’s consideration at a future meeting.

RECOMMENDATION: Staff recommends that the Board of Aldermen review the information presented in this agenda item and provide input on the provisions of the interlocal agreement/proposed cost-sharing, and on the water and sewer utility district concept.

**NORTH CAROLINA
ORANGE COUNTY**

**INTERLOCAL AGREEMENT BETWEEN ORANGE COUNTY AND THE TOWNS OF
CARRBORO AND CHAPEL HILL REGARDING THE REIMBURSEMENT OF COSTS
FOR ENGINEERING AND DESIGN SERVICES, CONSTRUCTION OF THE
COMMUNITY CENTER, AND COMMUNITY OUTREACH IN THE HISTORIC ROGERS
ROAD AREA**

THIS AGREEMENT, made and entered into this ____ day of _____, 2015 between Towns of Carrboro and Chapel Hill, both North Carolina municipal corporations (hereinafter jointly as the "Towns"), and Orange County, a political subdivision of the State of North Carolina (hereinafter referred to as the "County"), for reimbursement to the County by the Towns for the County's expenditures pursuant to the County's expenditures pursuant to the County's interlocal agreement with Orange Water and Sewer Authority ("OWASA") for engineering dated June 3, 2014 and for design dated June ____, 2015 and the County's community outreach agreement with the Marian Cheek Jackson Center for Saving and Making History, a North Carolina Nonprofit Corporation (hereinafter referred to as "Jackson Center") dated June 17, 2014 and the County's Outreach Work Plan for sewer outreach and Community-First Planning dated June ____, 2015 as well as for the construction of the Rogers Road Community Center building at 101 Edgar Street. (County and Towns may be referred to collectively as the "Parties".)

WITNESSETH

WHEREAS, the County and Towns are public bodies, politic and/or corporate, under the laws of the State of North Carolina and are vested with the power and authority by Article 20 of North Carolina General Statute Chapter 160A to enter into this Interlocal Agreement (hereinafter referred to as the "Agreement"); and

WHEREAS, representatives of the County and Towns have previously agreed in principle to jointly fund preliminary engineering and design services performed by OWASA for the purpose of designing sewer lines in the Historic Rogers Road Area and Community outreach and planning in that area with the County paying forty-three percent (43%), Chapel Hill paying forty-three percent (43%), and Carrboro paying fourteen percent (14%) of the total cost; and

WHEREAS, on February 10, 2014, the Town of Chapel Hill approved a resolution authorizing the Town Manager to prepare agreements and take appropriate budget action to initiate preliminary engineering and outreach efforts for the Rogers Road sewer project and on March 4, 2014 the Town of Carrboro approved a resolution authorizing the Town of Carrboro to share in the costs of preliminary engineering and community outreach; and

WHEREAS, representatives of the County and Towns also agreed in principle that the County would work directly with OWASA (Agreement attached as Exhibit 1) and the Jackson Center (Agreement attached as Exhibit 2), and that the County would be reimbursed for the designated percentages of the engineering, design, and community outreach and planning costs; and

WHEREAS, the County and Towns desire to formally establish the terms of the Towns' reimbursements to the County.

NOW, THEREFORE, in consideration of the foregoing and based on mutual promises and obligations set forth herein, the receipt and sufficiency of which is hereby acknowledged, the County and Towns agree as follows:

1. TERM AND TERMINATION

- a. This Agreement shall commence upon execution and shall continue until all reimbursements are paid in full with such payment in full occurring no later than June 30, 2016.
- b. This Agreement may be renewed or amended upon written agreement of the Parties.

2. TOTAL COSTS

PRELIMINARY PHASE 1

Project	<u>Entity</u>	Cost
<u>RENA</u> Community Center (Design/Construction/Oversight)	<u>Perkins + Will Architects</u> <u>Riggs-Harrod Builders</u>	\$650,000
<u>Sewer Preliminary Engineering Phase 1</u>	<u>URS (AECOM)</u>	\$130,000
<u>RENA</u> Community Outreach	<u>Marian Cheek Jackson Center (MCJC)</u>	\$50,000
<u>Sewer System Engineering Design Phase 2</u>	<u>AECOM</u>	\$415,000
<u>RENA Sewer</u> Implementation Outreach	<u>MCJC</u>	\$42,100
<u>RENA</u> Community First Planning	<u>MCJC</u>	\$47,800
TOTAL		\$1,334,900

3. RESPONSIBILITIES OF TOWNS

- a. The Town of Carrboro is responsible for fourteen percent (14%) of the total cost reflected in Section 2 above. The Town of Carrboro shall, upon receipt of a County generated invoice, pay to County the Town's respective percentage of the total costs reflected in Section 2.

- b. The Town of Chapel Hill is responsible for forty-three percent (43%) of the total cost reflected in Section 2 above. The Town of Chapel Hill shall, upon receipt of a County generated invoice, pay to the County the Town's respective percentage of the total costs reflected in Section 2. The Town of Chapel Hill's contribution shall be directed to toward the RENA Community Center portion of cost schedule set out in Section 2 as long as it does not exceed the cost.
- c. Each Town shall pay its full obligation as set out in this Section 2 within thirty (30) days of receipt of the County's invoice.

4. RESPONSIBILITIES OF COUNTY

- a. The County shall work directly with OWASA to secure engineering and design services and the Jackson Center to secure community outreach and planning services.
- b. The County is responsible for forty-three percent (43%) of the total cost reflected in Section 2 above.
- ~~b.~~
- c. The County shall invoice Towns for the specified reimbursement amounts and/or percentages as shown in Section 2. This invoice will be in the form of a single invoice upon the conclusion of the services contemplated in Exhibit 1 and Exhibit 2 and said invoice shall be accompanied by a written statement indicating those services have concluded.

5. ENTIRE AGREEMENT

This agreement constitutes the entire Agreement of the Parties hereto and is effective the date first above recorded.

[Signature Page to Follow]

In witness whereof, the Parties, by and through their authorized agents, have hereunder set their hands and seals as of the day and year first above written.

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

Manager, Orange County

ATTEST

By: _____
Clerk

Finance Director, Orange County

[SEAL]

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

Manager, Town of Carrboro

ATTEST

By: _____
Clerk

Finance Director, Town of Carrboro

[SEAL]

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

Manager, Town of Chapel Hill

ATTEST

By: _____
Clerk

Finance Director, Town of Chapel Hill

[SEAL]

Update on the Design of Sewers for the Historic Rogers Road Area

OWASA and Orange County executed an Interlocal Agreement on May 19, 2015 for OWASA to proceed with the design and permitting phase of the Historic Rogers Road Area (HRRA) sewer project.

Field work started in early August with consultants actively working in HRRA. The Jackson Center and the Rogers-Eubanks Neighborhood Association (RENA) have been assisting with coordination and communication as the crews are working in the project area. Field work including environmental assessment, surveying, geotechnical investigations and subsurface utility exploration is ongoing. The field work is expected to be completed in December, but weather and other factors could delay completion.

Information gathered from the field work will be used to prepare construction drawing and specifications, permits and easement plats. It is estimated the design and process of getting permits from State and local agencies will be complete in 2016. However, the easement acquisition process, which will be carried out by the County, can impact the schedule for design and permitting.

Based on findings from the preliminary engineering study completed in March 2015, the consultant estimates the project costs to install about 3.5 miles of gravity sewer lines at \$5.7 million. The estimate does not include costs for private plumbing installation, septic tank abandonment, easement acquisition or service availability fees. The consultant will provide revised construction cost estimates as the design is finalized.

The steps that take place after design, permitting and easement acquisition are bidding and construction. It will take about four months to prequalify contractors and formally bid and award the project and about a year to construct. Weather, unforeseen conditions and other factors can impact the schedule.

2015-218

PAF 5-19-2015
li Attachment C-1

**NORTH CAROLINA
ORANGE COUNTY**

**INTERLOCAL AGREEMENT
RELATING TO DESIGN OF A SEWER MAIN EXTENSION
PROJECT IN THE ROGERS ROAD AREA**

This Interlocal Agreement is dated as of May 19, 2015, and is entered into by and between Orange Water and Sewer Authority (hereinafter "OWASA"), a special purpose entity of local government organized under Chapter 162A, North Carolina General Statutes, and the County of Orange (hereinafter "County"), organized under Chapter 153A of the North Carolina General Statutes.

WHEREAS, the County desires at its expense to design a public sewer collection system project of mains and other necessary components, to provide sewer collection service to presently unserved properties in the area shown on the attached Exhibit A, (herein referred to as the "Project"), and

WHEREAS, the Project is designed and intended to collect wastewater from the properties located in the presently unserved area shown on Exhibit A, attached hereto, (the "Project Area"), which is adjacent to areas presently served by OWASA, with the understanding that the wastewater collected in the Project Area will be caused to flow into the existing OWASA wastewater collection system, and be treated and may be used as reclaimed water or returned to the surface waters of the State after treatment as required by existing OWASA permits from NC DENR; and

WHEREAS, the County has called on OWASA, and OWASA has agreed, as County's agent to undertake certain design services for and on behalf of the County, to assure that the Project is designed in accordance with OWASA's standards for its own system facilities; and

WHEREAS, OWASA and the County wish to cooperate to assure the successful completion of this Project;

NOW, THEREFORE, the parties agree as follows:

1. Purpose. The purpose of this Agreement is to establish the financial and other responsibilities of the parties for design of the sewer main extension project to serve the Project Area, as represented in the map included in Exhibit A, showing the Project area.

2. Design Phase.

a. At the conclusion of the Preliminary Engineering Phase for the Project, as that is defined in that previous Agreement between the parties dated _____, the County shall determine and approve the service area, scope, and design parameters for the Project, including the identification of each parcel of real estate (by PIN number) which County determines shall be served or otherwise benefitted by the Project, all subject to and in accordance with OWASA's usual design standards and system requirements.

b. Using its own employees, and such engineers, consultants and sub-consultants as it deems appropriate, and in consultation with the County, OWASA shall undertake to complete final design and surveying and the County will pay the costs of that work, including the costs of OWASA's employees' work, all as necessary to complete the Project so as to allow for its design in accord with this agreement.

c. During the design phase and prior to commencement of construction, the County shall obtain all easements, permits, privileges and assurances necessary for the construction and operation of the sewer system; such easements shall conform with the exclusive easements customarily required by OWASA for construction of such projects, and shall be assignable without the consent of the underlying fee owner to OWASA.

d. The Project shall be designed as a gravity-flow system, to the extent practical, and shall be designed to provide access to every Property identified by PIN on Exhibit A to connect and be served.

e. The County shall be responsible for payment and satisfaction of all obligations arising out of the performance and completion of the Contract, due from it as Owner of the Project, and shall indemnify and hold OWASA harmless from claims that may arise out of the Contractor's performance, or out of the County's performance of its duties as Owner of the Project, or that may be made against OWASA, except for such sums as may become due upon the adjudication of gross negligence or willful misconduct on the part of OWASA's employees.

f. In order to ensure proper and effective Project management, OWASA shall select and shall have charge of supervision of the engineering and other consultants who shall oversee the design of the Project. Those professional engineers and consultants shall be subject to the oversight and direction of OWASA's Engineer who shall have charge of OWASA's responsibilities hereunder. The Engineer and other consultants selected by OWASA shall report to OWASA staff, who shall work closely with County staff to ensure the County's requirements for the Project are met. In the event of any apparent conflicts between the County's and OWASA's requirements, the parties shall work together to find reasonable compromise and accommodations for the Project. In close coordination with OWASA and consistent with the need for effective Project management, the County Engineer or his/her designated representative will have full access to the Engineers and consultants working on the Project who shall upon request meet with the County representatives or provide any information needed by the County on any aspect of the Project. OWASA will authorize the Engineers and

consultants to meet with County representatives or provide any information needed by the County on any aspect of the Project.

3. The County shall allocate sufficient funds to pay for all the expenses incurred and obligations imposed within the scope of this agreement.

4. Change orders required for the Project will be approved by OWASA. However, OWASA shall keep the County fully advised with respect to all change orders necessary for completion of the Project.

5. Payment of the Engineers and other consultants shall be made by the County upon the approval and at the direction of OWASA. The County will be invoiced monthly and will reimburse OWASA in full within 30 days for all expenses related to this project as provided in Sections 2b. In addition, the County shall also reimburse OWASA all reasonable engineering staff cost associated with its staff for overseeing and managing the Project. OWASA shall itemize all such expenses in periodic invoices billed to the County.

6. Each party will designate a single point of contact for the day-to-day administration for all aspects of this agreement for the express purpose of efficient project management. It will be the responsibility of this contact person to disseminate information to their respective organizations.

7. Both parties recognize the importance of timely reviews and approvals. Each party will use their best efforts to provide and complete responses to issues dealing with reviews, approvals, and payment.

8. All amendments to this agreement shall be approved by both parties and must be in writing.

9. Both parties agree that there are many issues and details relating to the successful design of this project which are not specifically covered in this agreement. Both parties further agree to share a guiding principle of "trust and support" with respect to successfully resolving any issues which may arise during the duration of this agreement.

The parties have entered into this Interlocal Agreement this 19 day of May, 2015.

ORANGE COUNTY

ORANGE WATER AND SEWER AUTHORITY

Earl M. Kue
Orange County Commissioners, Chair

John A. G. G.
OWASA Board of Directors, Chair

Pre-audit Certification by
County Finance Officer:

Pre-audit Certification by
OWASA Finance Officer:

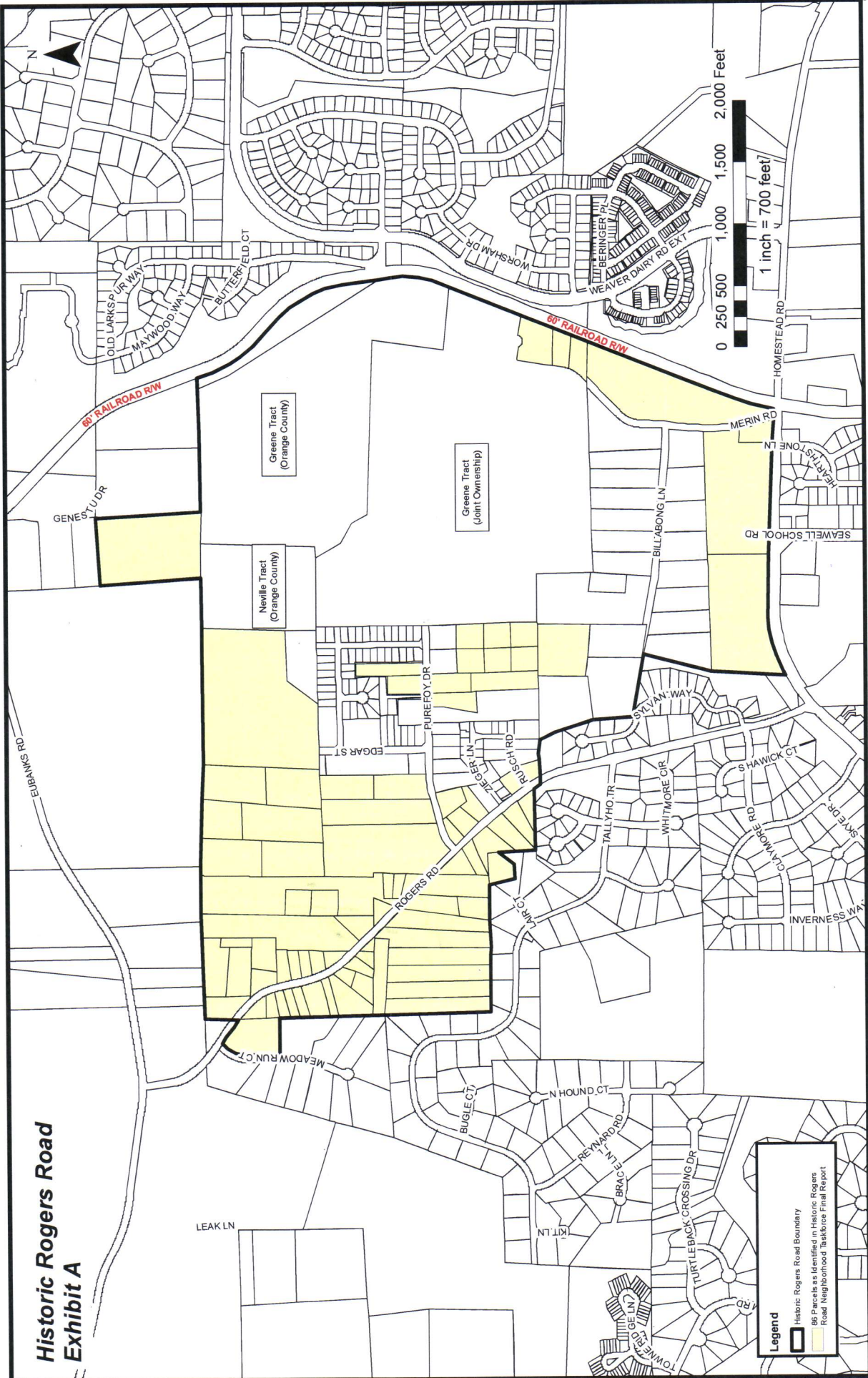
Paul Loughton, INTERIM CFO

[Signature]

Approved as to form and legality:

[Signature]
Orange County Attorney

[Signature]
OWASA General Counsel



**NORTH CAROLINA
ORANGE COUNTY****PERFORMANCE AGREEMENT**

THIS Agreement by and between Orange County, a Political Subdivision of the State of North Carolina, hereinafter referred to as "County" and the Marian Cheek Jackson Center for Saving and Making History, a North Carolina Nonprofit Corporation, hereinafter referred to as "Jackson Center." Each may be referred to as "Party" and together as "Parties."

WITNESSETH

WHEREAS, the proposed activities support the goals of the County and of the residents the Historic Rogers Road Community; and

WHEREAS, it is understood and agreed that the purpose of this Agreement is to outline the responsibilities of the County and the Jackson Center.

NOW THEREFORE, in consideration of the above mutual covenants and conditions hereinafter set forth, the County and the Jackson Center agree as follows:

1. County Responsibility

The Board of Commissioners of Orange County authorized the acquisition of utility easements for the purpose of constructing and maintaining sewer lines to service the Historic Rogers Road Neighborhood. County shall work with the Jackson Center to acquire such utility easements in a timely manner.

2. Payment and Reporting

A. Payment

Upon submission of a verifiable invoice County shall pay Jackson Center for work performed in accordance with Exhibit A, attached hereto. Upon execution of this Agreement and commencement of work Jackson Center may submit an invoice for \$22,475. Remaining verifiable invoices may be submitted in accordance with the timeline described in Exhibit B, attached hereto. County shall make payment on all verifiable invoices within thirty (30) days of receipt of said verifiable invoices. Final payment by County is contingent upon Jackson Center's verification that all work as described in Exhibit A has been completed.

B. Reporting

Jackson Center shall provide County, by delivery to the County Manager, reports detailing the work as described in Exhibit A. Such reports are to be submitted monthly during the Term.

3. Time of Performance

This contract covers the period from July 15, 2015 through January 15, 2016.

4. Financial Records

Jackson Center agrees to allow the County to inspect its financial books and records relating to the work performed pursuant to the Scope of Work and this Agreement upon reasonable notice during normal working hours.

5. Scope of Work

Jackson Center agrees to provide the services described in the Exhibit A. These services shall be provided to Orange County and the residents of the Historic Rogers Road Community. Jackson Center agrees to maintain a high level of professionalism in the provision of these services.

6. General Conditions

A. General Compliance

Jackson Center agrees to comply with all applicable federal, state, and local laws, regulations, and policies governing the funds provided under this Agreement.

B. Workers' Compensation

Jackson Center shall provide Workers' Compensation Insurance coverage for all of its employees involved in the performance of this Agreement.

C. Insurance and Bonding

Jackson Center shall carry general liability insurance with minimum coverage amounts of \$1,000,000 per occurrence and \$2,000,000 aggregate limit. It shall also carry Professional Liability insurance with minimum coverage amounts of \$1,000,000 per occurrence and \$1,000,000 aggregate limit.

D. Amendments

County and Jackson Center may amend this Agreement at any time provided that such amendments make specified reference to this Agreement, and are executed in writing, signed by a duly authorized representative of both organizations. Such amendments shall not invalidate this Agreement, nor relieve or release the County or the Jackson Center from their obligations under this Agreement. In its discretion, County may amend this Agreement to conform with federal, state, or local governmental laws, guidelines, policies and available funding amounts, or for other reasons. If such amendments result in a change in the funding, the services, or schedule of the activities to be undertaken as part of this Agreement, such modifications will be incorporated only by written amendment signed by both the County and Jackson Center.

E. Suspension or Termination

- i. Either Party may terminate this Agreement at any time by giving written notice to the other Party of such termination and specifying the effective date thereof at least 30 days before the effective date of such termination. In the event of any termination for convenience, all unfinished documents, data, reports or other materials prepared by the Jackson Center pursuant to this Agreement shall, at the option of the County, become the property of the County, and the Jackson Center shall be entitled to receive just and equitable compensation for any satisfactory work completed on such documents or materials prior to the termination.
- ii. In the event that the Jackson Center shall cease to exist as an organization or shall enter bankruptcy proceedings or be declared insolvent, or liquidate all or substantially all of its assets during the term of this Agreement, or materially fails to comply with any term of this Agreement or with any of the rules, regulations, or provisions referred to herein, or in the event that the Jackson Center shall fail to render a satisfactory accounting as provided herein, then and in that event, the County may suspend or terminate that Agreement.

F. Assignability

Jackson Center shall not assign or transfer any interest in this Agreement without the prior written consent of the County thereto; provided, however, that claims for money due or to become due to the Jackson Center from the County under this Agreement may be assigned to a bank, trust company, or other financial institution without such approval. Prior notice of any such assignment or transfer shall be provided to the County.

G. Conflict of Interest

Jackson Center has no financial interest and shall not acquire any financial interest, direct or indirect, which would conflict in any manner or degree with the performance or provision of services required under this Agreement. Jackson Center further covenants that in the performance of this Agreement no person having such a financial interest or who will benefit from the funded activity shall be employed or retained by the Jackson Center hereunder. These conflict of interest provisions apply to any person who is an employee, agent, consultant or officer of the Jackson Center or elected or appointed official of the County, or those with whom they have business or immediate family ties.

7. Hold Harmless

Jackson Center hereby agrees to defend, indemnify, and hold the County harmless against any claims or actions from damage, injury, or death relating to or arising out of the use of County funds or due to acts or omissions of the Jackson Center's employees, contractors, or agents in carrying out the work to be performed pursuant to this Agreement.

8. Administrative Requirements

Documentation and Record-Keeping

A. Maintenance of Records

Jackson Center shall maintain all records that are pertinent to the activities to be funded under this Agreement. Such records shall include but not be limited to:

- i. Records providing a full description of each activity undertaken;
- ii. Records required to determine the eligibility of activities;
- iii. Financial records; and
- iv. Other records necessary to document compliance as determined by the County.

B. Retention of Records

Jackson Center shall retain all records pertinent to expenditures incurred under this Agreement for a period of five (5) years after the termination of all activities funded under this Agreement. Records for non-expendable property acquired with funds under this contract shall be retained for five (5) years after final disposition of such property.

C. Access to Records

Jackson Center shall furnish and cause each of its subcontractors to furnish information and reports required hereunder and will permit access to such subcontractors' books, records, and accounts by the County, or other authorized officials for purposes of investigation to ascertain compliance with the rules, regulations and provisions stated herein.

9. Nondiscrimination

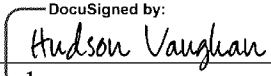
Jackson Center will not discriminate against any employee because of race, color, creed, religion, ancestry, national origin, sex, disability or other handicap, age, marital/familial status, sexual orientation, gender identity, gender expression, or status with regard to public assistance. The Jackson Center will take affirmative action to insure that all employment practices are free from such discrimination. Such employment practices include but are not limited to the following: hiring, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff, termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. The Jackson Center agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting agency setting forth the provisions of this nondiscrimination clause.

10. Severability

If any provision of this Agreement is held invalid, the remainder of the Agreement shall not be affected thereby and all other parts of this Agreement shall nevertheless be in full force and effect.

IN WITNESS WHEREOF, the parties hereunto cause this agreement to be executed in their respective names.

MARIAN CHEEK JACKSON CENTER FOR SAVING AND MAKING HISTORY

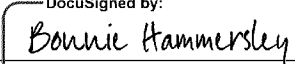
DocuSigned by:

 Hudson Vaughan

 Printed Name and Title

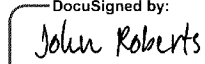
 Attest

 Printed Name and Title

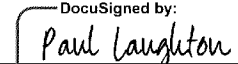
ORANGE COUNTY

DocuSigned by:

 Bonnie Hammersley, County Manager

Approved as to Form and Legal Sufficiency

DocuSigned by:

 County Attorney

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

DocuSigned by:

 OFFICE OF THE CHIEF FINANCE OFFICER

Outreach Work Plan: Part 2

Jackson Center/RENA/Rogers Road Partnership Proposal

EXHIBIT A: Work Program

1. OVERVIEW

The objective of the Marian Cheek Jackson Center (Jackson Center) is to continue to work in partnership with Rogers Eubanks Neighborhood Association (RENA) for two primary purposes:

- 1) To continue to assist OWASA and the concerned municipalities with outreach about sewer implementation, including communication and engagement about sewer easements and next steps of the project, securing and advancing neighborhood feedback and guidance in the municipal planning processes.
- 2) To help facilitate a community-first planning effort, specifically aimed at assisting neighbors in developing a set of guiding principles for planning decisions and engaging neighbors in proactive long-term planning as sewer implementation begins.

2. SCOPE OF SERVICES

Concentration 1: Sewer implementation outreach

As sewer design begins, there are a number of ways in which outreach, community engagement, and ongoing communication will be essential both for the success of the project and its ability to continue movement forward expeditiously. We can assist neighborhood leaders and OWASA engineers with community outreach and communication as they approach the design phase of the sewer project. We can serve as a conduit for communication and help ensure that neighbors are engaged at each stage of the design and have accurate and clear information. This will also include continued stakeholder engagement and additional capacity support for ongoing neighborhood communication strategies that were developed over the first period of our contract.

The scope of work will include the following:

- Organize an initial public meeting with the support of the three municipal partners and OWASA to share information about the design process
- Attend weekly meetings with municipal planners, neighborhood leadership and OWASA to discuss timeline and priorities for the month

- Serve as communication conduit, ensuring appropriate information about sewer implementation is shared with all neighbors in the Historic Rogers Road neighborhood and municipal partners through multiple communication forums established during first period of contract, including but not limited to door-to-door conversations, community newspapers, and small group gatherings.
- Follow up with individual households once OWASA releases the initial “30%” plan that requires specific feedback on the design and easement feedback. This will likely include an additional public review meeting to ensure broader stakeholders have a chance to review the initial design.
- Synthesize feedback from outreach efforts to help ensure the most appropriate adjustments and options are chosen given both neighborhood feedback and realities and engineering proposals and realities
- Once the “60%” plan is released by OWASA, we will assist the partners (neighbors, OWASA, Orange County) on sewer easement communication/acquisition, helping expedite the process as much as possible by connecting OWASA/Orange County more effectively with neighbors and ensuring the big picture work is shared with all parties. This will include working closely with neighborhood leadership and Orange County staff to set up a second round of communication with all landowners/residents directly impacted by the sewer project.
- Provide feedback on the sewer implementation process at relevant municipal meetings given outreach efforts to help movement forward in a full and expedited manner (as much as possible given realities and challenges of engineering work)

Concentration 2: Community-First Planning¹

The Jackson Center’s experience is primarily in community planning and strategy work. Each municipal partner has expressed different concerns about the pressures of development and the need for community guidance as development proposals arrive and planning decisions begin to be made. Chapel Hill Council Members expressed this concern when the council voted to expand the ETJ and development proposals began arriving for large tracts of land on the

¹ We have utilized a model of community-first planning in our work in Northside. This model is built on an intensive set of communication and organizing tools that bring neighbors and other stakeholders into active and honest planning discussions with the tensions and possibilities of change. Our model engages the strengths and struggles of history first and continually. Creative communication strategies are a central part of our work: we find ways to reach people the ways they best receive contact. We develop clear “gives and gets” strategy framework. We believe that discussing the benefits and challenges openly is the best way for communities to mobilize for movement forward

periphery of the neighborhood. Orange County Commissioners, in ceding its joint planning decision power, expressed concern about community influence in planning decisions, wanting to ensure that neighbors had some power in future decisions. Carrboro Alderman have more clear guidance in their zoning area but have also wanted to ensure that equity work truly benefits the historic residents and does not lead to gentrification and displacement. As sewer design moves forward, we can design and implement a community-first planning process that engages the Historic Rogers Road neighborhood broadly and specifically. Much historic work has been done (including our partnership outreach work last year), and our model builds on the power of the historic work. This process will result in three clear deliverables: a set of guiding principles/priorities developed by the community (that can be helpful for future planning decisions), a map (or set of maps) of general recommendations for place-specific hopes, and a set of neighborhood strategies that can be implemented by ongoing resident leadership to help pursue community aspirations. These strategies will include tools and resources that allow for neighbors to give guidance for future neighborhood development and to help combat gentrification. We believe that prior work requires preparation and execution of a thoughtfully focused series of conversations that will simultaneously contribute to community development and sewer implementation.

The scope of work will include the following:

- Meet with community leadership and each municipal partner to engage previous plans (small area, zoning designations, task force recommendations) and the principles/aspirations behind them.
- Work with RENA leaders, additional community leaders, and a team of consultants (sub-contractors) to establish an initial draft of guiding principles/priorities given historic efforts, plans, and recent surveys and engagement.
- Develop, organize, and help convene a key stakeholder group, made up primarily of residents from different parts of the Rogers Road neighborhood, to include the various subsections of the neighborhood between Homestead and Eubanks.
- Convene and facilitate at least three (likely 4) meetings with this stakeholder group to set guiding principles/priorities given three months of input, to design a community-based map that gives general municipal direction on community hopes, and to create a set of strategies for neighbors to implement as sewer implementation begins.
- Host a final larger community forum for input on the draft of the plan and its implementation.

- Submit a final draft of the three-prong community plan to the three municipalities which can be used to guide future planning efforts and ensure community recommendations are established as sewer implementation begins
- Provide technical mapping and data assistance throughout planning process

EXHIBIT B: Timeline and Compensation

Timeline for concentrations:

Concentration 1: 6 months of active work, in two-month phases (proposed start of July 15)

- First 2 months: broad based communication and larger information meeting
- 2 months following release of 30% plan: intensive door-to-door engagement, easement adjustments, and broad based outreach
- Two months following 60% plan: assistance with easement communication and outreach for County

Concentration 2: 6 months from beginning of contract (proposed start of July 15)

- First two months: engagement of principles and design of planning process
- Next four months: intensive community-first planning process

Compensation:

Our model for compensation balances several pieces:

- 1) This work will primarily be completed by our most experienced staff and several sub-contractors with expertise in community mapping, neighborhood planning, and community facilitation.
- 2) We will be sub-contracting RENA for ongoing neighborhood organizing and capacity building.

These concentrations can be separated based on timeline and role. Both numbers below assume a 6-month contract period of work. The exact amount will depend on final scope and amount of time required.

Area 1: Sewer Implementation Outreach

\$42,100

Area 2: Community First Planning

\$47,800

*The total compensation includes all staff costs, sub-contracts (RENA, mapping, database, technical and design, etc) and program support that will enable this initiative to be successful.

Payment: 25% of overall contract invoiced upon signing (\$22,475). Billing for the remainder will be every two months from beginning of the contract, with 25% of each concentration billed at the two and four month marks, and the final 25% at the conclusion of the 6-month contract.



CERTIFICATE OF LIABILITY INSURANCE

MARICHE OP ID: DR

Attachment DATE (MM/DD/YYYY)

01/22/2015

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER The Sorgi Insurance Agency 16 Consultant Place Suite 102 Durham, NC 27707 James E. Sorgi, CIC	Phone: 919-682-4814 Fax: 919-682-4906	CONTACT NAME: Lee Hammond PHONE (A/C, No, Ext): 919-682-4814 FAX (A/C, No): 919-682-4906 E-MAIL ADDRESS: lee@sorgiinsurance.com														
INSURED Marian Cheek Jackson Center for Saving and Making History 512 West Rosemary St Chapel Hill, NC 27510		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: center;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: center;">NAIC #</th> </tr> <tr> <td>INSURER A: Erie Insurance Exchange</td> <td style="text-align: center;">26271</td> </tr> <tr> <td>INSURER B: Westchester Fire Insurance Co</td> <td></td> </tr> <tr> <td>INSURER C:</td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Erie Insurance Exchange	26271	INSURER B: Westchester Fire Insurance Co		INSURER C:		INSURER D:		INSURER E:		INSURER F:	
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COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	GENERAL LIABILITY	X		Q970503239	08/15/2014	08/15/2015	EACH OCCURRENCE \$ 1,000,000
	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY						DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR						MED EXP (Any one person) \$ 5,000
							PERSONAL & ADV INJURY \$ 1,000,000
							GENERAL AGGREGATE \$ 2,000,000
							PRODUCTS - COMP/OP AGG \$ 2,000,000
GEN'L AGGREGATE LIMIT APPLIES PER:							
<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC							
A	AUTOMOBILE LIABILITY			Q970503239	08/15/2014	08/15/2015	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
	<input type="checkbox"/> ANY AUTO						BODILY INJURY (Per person) \$
	<input type="checkbox"/> ALL OWNED AUTOS						BODILY INJURY (Per accident) \$
	<input checked="" type="checkbox"/> HIRED AUTOS						PROPERTY DAMAGE (Per accident) \$
	<input type="checkbox"/> SCHEDULED AUTOS						
<input checked="" type="checkbox"/> NON-OWNED AUTOS							
	UMBRELLA LIAB						EACH OCCURRENCE \$
	EXCESS LIAB						AGGREGATE \$
	<input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE						
	DED <input type="checkbox"/> RETENTION \$						
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			Q921501020	08/15/2014	08/15/2015	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)						E.L. EACH ACCIDENT \$ 500,000
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE \$ 500,000
							E.L. DISEASE - POLICY LIMIT \$ 500,000
B	Professional Liab.			G27096566001	11/05/2014	11/05/2015	Prof Liab 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

Orange County as additional insured as respects to general liability

CERTIFICATE HOLDER**CANCELLATION**

Orange County Risk Manager
P.O. Box 8181
Hillsborough, NC 27278

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE



ROGERS ROAD SEWER PROJECT

Community Meeting: July 28, 2015 at 6:00 pm

1. Welcome & Purpose David Caldwell, *RENA*
Min. Robert Campbell, *RENA*
2. Overview of meeting Hudson Vaughan, *Jackson Center*
3. Introductions & Announcements Town & County Staff
4. Sewer Design Overview & Time Frame Jeremy Fireline, *OWASA*
5. Easement Process Travis Myren, *Orange County*
6. Next Steps
 - Project Information: Hudson Vaughan, *Jackson Center*
David Caldwell, *RENA*
 - Typical sewer project steps from here Jeremy Fireline, *OWASA*
Mary Darr, *OWASA*
7. Questions (can be written on card or asked aloud)

A map, flow-chart timeline, and other materials will be available for closer viewing at the end of the agenda above. Staff from OWASA, the county, and towns will be available to show you your property and answer questions more directly if you want to stay for a few minutes after the meeting.



*A public, non-profit agency
providing water, sewer and
reclaimed water services to the
Carrboro-Chapel Hill
community.*

Quick Facts:

What:

Surveying and other work needed for detailed design of sewers to serve the Historic Rogers Road Area

Where:

Historic Rogers Road Area

When:

Surveying, soil borings, etc.:
August 2015 - December 2015
(subject to change)

Why:

To get information about property boundaries, large trees, and soil/rock conditions needed to design sewers to serve the HRRA.

ORANGE WATER AND SEWER AUTHORITY

400 Jones Ferry Road
Carrboro, NC 27510-2001
Voice (919) 968-4421

You can follow OWASA on Twitter at
www.twitter.com/owasa1



PROJECT UPDATE

October 9, 2015

SEWER DESIGN FOR HISTORIC ROGERS ROAD AREA

Dear Citizen:

Here is an update about our work to design sewers to serve the Historic Rogers Road Area and some additional properties.

- **Land surveyors are continuing their work** to get information on property boundaries, the slope of the land, potential boundaries of sewer "easements," etc. We estimate that surveying may be complete by November 2015. (Orange flags indicate locations marked for survey purposes.)

A sewer easement is an area, normally 30 feet wide, where a sewer pipe might be installed below ground and where a utility such as OWASA has the right to do improvements, maintenance, repairs and inspections and to keep clear access. The land is still owned by the property owner. Orange County staff will contact and meet with property owners about the need for easements to enable installation of sewers. OWASA mailed letters in July to owners and residents of properties where we believe at this point that easements will be needed.

- **Our consultant's staff has marked the boundaries of "wetlands"** (areas where the ground is temporarily or permanently saturated with water) with blue and white ribbons placed on trees and other objects.
- **Starting in mid-October, a company working for our consultant will drill ("bore") 4-inch wide holes into the ground to check for the presence and depth of rock.** The holes will be filled after the drilling. This work may be complete by December 2015. The map on the other side of this letter shows the locations for the boring. White flags indicate areas where boring will be done or where boring equipment may travel.

Timetable for the detailed design: We now estimate the design and process of getting permits from State and local agencies will be complete in 2016. However, the time needed for design will depend on several factors including how long it takes to acquire easements.

It was decided to not evaluate the option of a pump station as part of the sewer design work. (We received several comments about this matter in the community meeting on July 28th.)

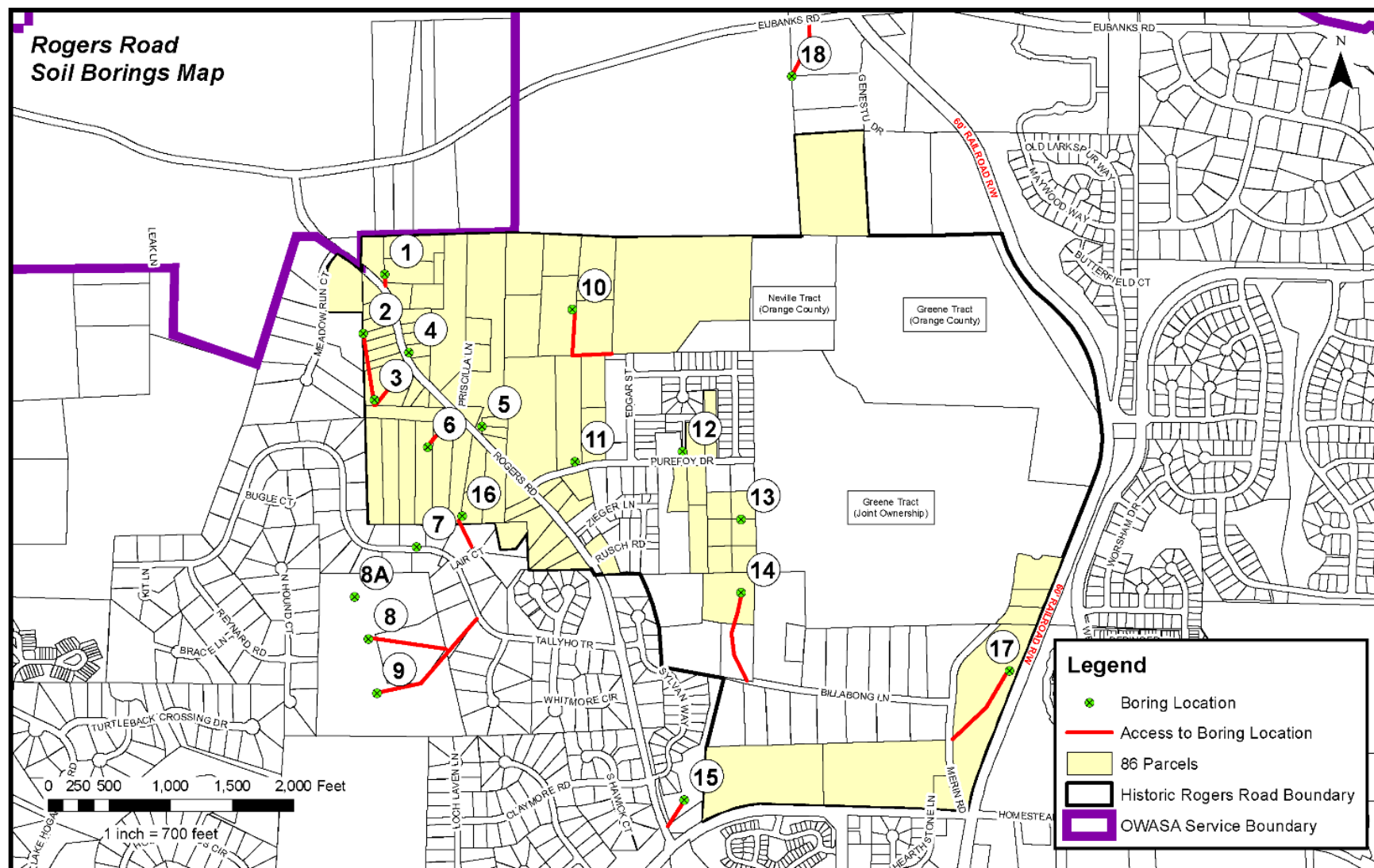
Questions or comments?

Please feel free to contact me at any time with any comments or questions.

Jeremy Fireline, P.E., Project Manager
919-537-4249 or jfireline@owasa.org

(continued on back)

Locations of drilling to check for the presence of underground rock



Update on Progress of Outreach Work Plan: Part 2:

Concentration 1: Sewer implementation outreach

Scope of Services	Work completed to date
<p>Organize an initial public meeting with the support of the three municipal partners and OWASA to share information about the design process</p>	<p>Complete. Included:</p> <ul style="list-style-type: none"> ✓ Publicity & Outreach: Designed and distributed flyers, conducted door knocking, completed online outreach (email & “nextdoor”) and phone calls to ensure all residents were engaged in the process ✓ Planning and implementation: Helped organize key questions and agenda. Met several times with OWASA team to provide feedback on presentation and make it direct and relevant to community members. RENA and Jackson Center met with Orange County staff to review and adapt plan. Assisted in set-up and facilitation for meeting involving over 60 people ✓ Follow-up. Reached dozens of households in historic Rogers Road to provide updates and receive feedback, especially on key questions raised at community meeting (pump station possibility). Provided relevant feedback to Orange County.
<p>Attend weekly meetings with municipal planners, neighborhood leadership and OWASA to discuss timeline and priorities for the month</p>	<p>Ongoing. In addition to weekly meetings with staff, we have participated in meetings about the utility district with the managers, Orange County & OWASA. RENA and the Jackson Center also meet twice a week to complete ongoing priorities in dialogue together.</p>
<p>Serve as communication conduit, ensuring appropriate information about sewer implementation is shared with all neighbors in the Historic Rogers Road neighborhood and municipal partners through multiple communication</p>	<p>Ongoing. We (Jackson Center and RENA) have established weekly and monthly communication avenues and have hired and trained two interns who live in Rogers Road to assist in broad-based, consistent communication, including:</p> <ul style="list-style-type: none"> ✓ Community newspaper: the Baja News was published and distributed to all households in the Rogers Road community (300+ households) in September and October, and it will be

<p>forums established during first period of contract, including but not limited to door-to-door conversations, community newspapers, and small group gatherings.</p>	<p>monthly. Each month, it includes an update about sewer design, a list of community and relevant government meetings, and updates from the RENA community center.</p> <ul style="list-style-type: none"> ✓ Weekly phone calls and emails: We make weekly phone calls & send weekly emails to historic Rogers Road households to provide updates and receive ongoing feedback/questions. In a recent call, we were told that the ongoing communication had been “unprecedented” and was extremely appreciated. ✓ Information board: We established an information board for the Sewer design process that is updated each week and can be utilized by neighbors dropping through the community center ✓ Direct outreach: We continue to provide direct outreach whenever partners need it. This has included phone calls to specific households to trouble shoot when OWASA contractors have had barriers (like not being able to access properties). We contacted property owners of sites in which boring was going to take place. We continue to receive questions and comments that we relay to the relevant partners.
<p>Follow up with individual households once OWASA releases the initial “30%” plan that requires specific feedback on the design and easement feedback. This will likely include an additional public review meeting to ensure broader stakeholders have a chance to review the initial design.</p>	<p>Scheduled for early November once the 30% plan is released. We are meeting with Orange County staff in October to work out the details of this plan.</p>
<p>Synthesize feedback from outreach efforts to help ensure the most appropriate adjustments</p>	<p>Ongoing. Some work completed so far:</p> <ul style="list-style-type: none"> ✓ Provided synthesis of community feedback to Orange County regarding the possibility of

<p>and options are chosen given both neighborhood feedback and realities and engineering proposals and realities</p>	<p>exploring a pump station option</p> <ul style="list-style-type: none"> ✓ Provided feedback and information to Managers on how best to engage Rogers Road residents in exploring funding options for sewer project ✓ Provided survey information for Orange County regarding neighborhood income data
<p>Once the “60%” plan is released by OWASA, we will assist the partners (neighbors, OWASA, Orange County) on sewer easement communication/acquisition, helping expedite the process as much as possible by connecting OWASA/Orange County more effectively with neighbors and ensuring the big picture work is shared with all parties. This will include working closely with neighborhood leadership and Orange County staff to set up a second round of communication with all landowners/residents directly impacted by the sewer project.</p>	<p>Not yet relevant. We will be beginning to make plans for this alongside of the October/November engagement.</p>
<p>Provide feedback on the sewer implementation process at relevant municipal meetings given outreach efforts to help movement forward in a full and expedited manner (as much as possible given realities and challenges of engineering work)</p>	<p>We have continued to provide updates at regular staff meetings and our meetings with the Town and County Managers and are available for additional meetings as needed.</p>

Concentration 2: Community-first Planning

Scope of Services	Work Completed to Date
<p>Meet with community leadership and each municipal partner to engage previous plans (small area, zoning designations, task force recommendations) and the principles/aspirations behind them.</p>	<p>Complete and ongoing. Work completed:</p> <ul style="list-style-type: none"> ✓ Reviewed relevant historical documents and developed a framework for discussions with town and county staff involved in previous and current plans ✓ Facilitated one joint meeting and follow-up sessions with county and town staff to seek feedback on previous plans, engage context of development in the area, get input on the format and design of helpful plans, and engage unanswered questions in the process ✓ Facilitated several (3) small group sessions with RENA and community leadership engaging community principles/aspirations from previous plans
<p>Work with RENA leaders, additional community leaders, and a team of consultants (sub-contractors) to establish an initial draft of guiding principles/priorities given historic efforts, plans, and recent surveys and engagement.</p>	<p>In process. Our team of Jackson Center staff, RENA leaders, and consultants (data/mapping, planning, and communications) have met weekly to synthesize principles and priorities from previous plans, community and government staff conversations, previous surveys, and ongoing engagement. This summary of historical work was brought into discussion at the Community Unity Stakeholder group at their initial meeting on October 8th. The group is now engaging their sub-neighborhoods in questions about their visions for the future of the neighborhood to develop/revise a list of guiding principles, which will inform the rest of the process.</p>
<p>Develop, organize, and help convene a key stakeholder group, made up primarily of residents from different parts of the Rogers Road neighborhood, to include the various subsections of the neighborhood between Homestead and Eubanks.</p>	<p>Over the last two months, RENA and the Jackson Center have developed a list of representatives from all of the sub-neighborhoods of Rogers Road that builds on the previous “Community Unity Board” infrastructure. Invitations were sent to leaders from across the community to join our intensive planning effort these next three months. 20 residents of Rogers Road have agreed to participate in this process (including residents of Historic Rogers Road,</p>

	Tallyho, Meadow Run, Billabong, Phoenix Pl, Rush) and to engage their sub-sections of the neighborhood throughout the process.
Convene and facilitate at least three (likely 4) meetings with this stakeholder group to set guiding principles/priorities given three months of input, to design a community-based map that gives general municipal direction on community hopes, and to create a set of strategies for neighbors to implement as sewer implementation begins.	The first meeting was held on October 8. Future meetings will be roughly every other week for the next two months. Two major community meetings will be held between mid-November and mid-January.
Host a final larger community forum for input on the draft of the plan and its implementation.	Two major community meetings will be held between mid-November and mid-January.
Submit a final draft of the three-prong community plan to the three municipalities which can be used to guide future planning efforts and ensure community recommendations are established as sewer implementation begins	To be submitted in January.
Provide technical mapping and data assistance throughout planning process	Ongoing. In addition to using our neighborhood database and survey data on an ongoing basis, we have also involved a professional mapmaker and a national planning consultant in the community planning process.

TO: Town of Carrboro Alderman
Town of Chapel Hill Council
Board of Orange County Commissioners

FROM: David Andrews, Town of Carrboro Manager
Bonnie Hammersley, Orange County Manager
Roger Stancil, Town of Chapel Hill Manager

RE: Rogers Road Water and Sewer District Proposal

The final report of the Historic Rogers Road Neighborhood Task Force, September 17, 2013 included recommendations to proceed with the Rogers Road Sewer project. The task force also contemplated the creation of a water and sewer district and directed the managers to explore the creation of such a district using a collaborative approach. The purpose of this memorandum is to inform our Boards of a joint recommendation for the creation, financing and development of a Rogers Road Water and Sewer District (District) which is further explained below.

The Managers have discussed this recommendation with Ed Kerwin, OWASA Executive Director for technical support, Bob Jessup, Bond Counsel for legal procedural issues, and the Rogers Road Eubanks Neighborhood Association (RENA) representatives David Caldwell and Reverend Campbell for the community perspective. The conversations have been well received and we anticipate working closely with these stakeholders as the recommendation matures.

The commitment to extend the sewer system to the 86 owners of properties within the Historic Rogers Road neighborhood has been and will remain the priority throughout the consideration of a proposed Rogers Road Water and Sewer District.

Objective

The objective of creating a Water and Sewer District is to provide a tool to finance expenditures in the District. To accomplish this goal, staff recommends that Orange County create the Rogers Road Water and Sewer District. The Managers' are recommending this course because a) the District would be able to implement a schedule of rates, fees, and charges independent of OWASA's schedule, which can therefore be tailored to the special characteristics of the District, and b) the District may be able to obtain loans and grants that Chapel Hill, Carrboro, and Orange County are not eligible for (such as funds from social justice agencies or funds from water and sewer infrastructure grant programs). In addition, the District will not have its own planning authority and can serve as a focus for joint planning of the area by the three jurisdictions.

Procedure

The creation of the District is not procedurally complex—all that is needed is a) a public hearing (preceded by published and posted notice) and b) a simple resolution enacted by the Board of County Commissioners stating that the District's residents will benefit from the District's establishment. The entire process of creating the District can be completed as quickly as 60 days from publishing the notice of public hearing. By law, the Board of County Commissioners serves as the District's governing body. The District would contract with OWASA to manage the provision of water and sewer services within the District. The Town of Carrboro would need to consent through resolution to including any portion of the District lying within Carrboro town limits as part of the District.

Financing

Debt financing would be used to extend service to the District's residents. District construction costs would be funded by either a) the District borrowing from private sources or b) the three governments advancing funds to the District from borrowed funds or cash on hand.

- Legally available methods for the District to borrow money on its own would include general obligation bonds (after approval by voters within the District), revenue bonds and installment financing. Because of the limited asset base and cash-flow of the District, however, Chapel Hill, Carrboro, and Orange County (in some combination) would likely be asked to commit to a "moral obligation" to provide funds to bridge any gaps in debt service payments.
- If the three governments and/or OWASA advance funds to the District, the funding partners would either a) pay cash into a central fund upfront for construction costs, b) pay OWASA as requested, or c) a combination of the two. Any partner could borrow its contribution, and the District's repayment obligation to the partner could bear interest.

The District would use some combination of several available revenue streams to repay the debt, whether to a third-party lender or back to the funding partners. The District could use its net operating revenues as the primary source of repayment. The capital charges could be levied, such as development fees for currently open space. The District would have its own taxing authority (via a separate rate set by the County Commissioners should they choose to levy an additional tax) and could levy special assessments.

The Managers' will present this recommendation to their respective Boards independently for feedback and consideration in October at a regularly scheduled meeting. If you have any questions in the meantime, please do not hesitate to contact us.

A RESOLUTION SPECIFYING FOLLOWUP ACTIONS RELATED TO DISCUSSION OF
CARRBORO VISION2020

WHEREAS, the Town of Carrboro has engaged in numerous planning efforts since the 1970s; and

WHEREAS, the Town most current visioning document Carrboro Vision 2020 is now thirteen years old; and

WHEREAS, the Board of Aldermen has expressed interest in discussing how Vision 2020 has guided decision making, particularly in relation to social impact/equity.

NOW, THEREFORE, BE IT RESOLVED by the Carrboro Board of Aldermen that the Board accepts the update.

AND FURTHERMORE, BE IT RESOLVED that the Board directs staff to:

1. _____
2. _____
3. _____

This is the 20th day of October in the year 2015.

Carrboro Board of Aldermen Retreat, 2/15/15

Minutes

Present: Mayor Lydia Lavelle, Alderman Michelle Johnson, Alderman Jacquelyn Gist, Alderman Randee Haven-O'Donnell, Alderman Bethany Chaney and Alderman Sammy Slade

Also Present: David Andrews, Town Manager, Nate Broman-Fulks, Assistant to the Town Manager, Mike Brough, Town Attorney

BOARD RELATIONS: HOW THE BOARD MAKES DECISIONS

The purpose of this item was for the Board to discuss values and decision making strategies.

Facilitator Andy Sachs opened the retreat with a review of the agenda and opened the floor to Alderman Gist to frame the conversation for this agenda item. Alderman Gist described the purpose of the agenda item and summarized the agenda item readings.

The Board discussed their interpretations and opinions on the readings and how it relates to the Board's decision making as a body and for each individual Board Member.

The Board decided to have a work session to revisit Carrboro's Vision 2020 to discuss its usefulness in guiding decision making, in particular in regard to social impact/equity. Each Board member agreed to draft language that encapsulates their viewpoint and thoughts.

ECONOMIC DEVELOPMENT UPDATES

The purpose of this item was for the Board to receive an update regarding Economic Development.

Clay Schossow gave an update on the Carrboro Business Alliance

Alderman Slade suggested Board members facilitate some of the Alliance's events and groups.

Alderman Gist suggested the creation of scholarships.

The Board directed the Manager to provide them information regarding what support the Town has given to ESC, BALLE attendance and scholarships.

Economic and Community Development Director Annette Stone provided an update on the Town's branding and marketing efforts.

Mayor Lavelle suggested having t-shirts with a variety of colors.

Alderman Chaney suggested staff look into appropriate manners of charging for the use of the Town's logo.

Alderman Slade expressed concern over how the Town's current zoning for manufacturing allows for uses other than manufacturing. He asked the Town to look into creating a manufacturing zone that is purely a light manufacturing zone and to assess appropriate places for this zone.

The Board decided to have a work session on light manufacturing zoning. The Board asked staff to present to them information on zoning solely for light manufacturing and appropriate areas for this, zoning with a mechanism for balancing light manufacturing and other uses, the challenges around light manufacturing around Highway NC-54. The Board directed the Manager to work with Orange County on NC-54 challenges.

NEIGHBORHOOD PROTECTION AND COMMERCIAL DEVELOPMENT DISCUSSION

The purpose of this item was for the Board of Aldermen to discuss the protection of neighborhoods in association with proposed commercial development.

Planning Director Trish McGuire provided an overview of zoning around major areas of transition between residential and commercial.

The Board decided to have a future work session to discuss principles around what tools the Town has to combat studentification, what is needed for and how to define a buffer between commercial and residential zoning and how the Town should handle rezoning requests that affect this.

The Board directed the Manager to reach out to the Sunset neighborhood to supply them with a Zoning 101 type of education.

ARTS DISTRICT

The purpose of this item was for the Board to discuss the Arts District and follow-up from the Capstone Report.

Planning Director Trish McGuire provided an overview of this agenda item.

Alderman Gist suggested researching Apps that show available parking and kiosks in parking lots that direct people to all types of businesses.

Mayor Lavelle suggested having walking tours around town and thought the Town should look to Asheville as an example of this.

Alderman Haven-O'Donnell suggested asking businesses what they need and would like.

Alderman Chaney suggested considering having the Arts Center serve as the lead agency.

Alderman Johnson suggested involving the Orange County Arts Commission and the Orange County Arts Guild.

Alderman Gist suggested the creation of a group similar to what Orange County Affordable Housing Coalition is for affordable housing.

Alderman Slade suggested finding ways to ensure that the Town will continue to be a vibrant place for artists to live and work.

The Board decided that there should be a joint meeting with Orange County Arts Commission and the Carrboro Arts Commission that includes ESC.

AFFORDABLE HOUSING

The purpose of this item was for the Board to discuss affordable housing.

Assistant to the Town Manager Nate Broman-Fulks gave an overview of the Town's affordable housing accomplishments since July, current actions and future plans. Planning Director Trish McGuire gave an overview of the proposed land use regulations review process.

Alderman Gist expressed concern for ensuring Carrboro is affordable for the middle class as well as lower income households. Alderman Gist suggested looking into the effect livability has with regard to higher property values and its impacts on affordable housing.

Alderman Slade proposed looking at Orange County's bond proposal and determining how much the Town should request for Affordable Housing. Alderman Slade suggested looking at what the current need is and what groups are able to be addressed through available subsidies.

Mayor Lavelle suggested looking into the ability to pay for the rent for a unit that is left unoccupied due to Housing Choice Voucher policies slowing down the ability to fill a vacancy in an apartment that accepts the vouchers. Mayor Lavelle also suggested looking into a transportation report from the area MPOs.

The Board directed the Town Manager to send links to Chapel Hill's Affordable Housing "Come Learn with Us" Sessions to the Board.



TOWN OF CARRBORO

NORTH CAROLINA

STAFF MEMORANDUM

PLANNING DEPARTMENT

**To: David Andrews, Town Manager
Mayor and Board of Aldermen**

From: Patricia J. McGuire, Planning Director

Date: September 18, 2015

Subject: Carrboro Vision2020 – Role in Policy Decisions/Justice Considerations

Introduction. Carrboro Vision2020 was adopted on December 5, 2000, resulting from the work of a citizen- and Board of Aldermen-member task force to evaluate the preceding strategic policy framework (Year 2000 Task Force Report) and gather community input on concepts that could frame growth and development through the year 2020. The slim volume (<http://www.townofcarrboro.org/DocumentCenter/Home/View/1371> Attachment D) organized into six topical areas, has served to inform public discourse, budgeting, policy, and regulation since its adoption.

During its retreat on February 15, 2015, the Board of Aldermen explored values and decision making strategies. Included with the agenda materials was an essay from the Stanford Encyclopedia of Philosophy (SEP) on John Rawls' Theory of Justice (<http://plato.stanford.edu/entries/original-position/>) and the meeting agenda outlined the discussion to include the Board considering using justice as a fundamental element of decision-making and possibly communicating this in a statement. After some discussion, it was agreed that the Board of Aldermen would have a work session to discuss the usefulness of Vision2020 in decision-making, especially in relation to social impact and equity.

This memo provides an overview of the manner in which Vision2020 has been used in the Town's decision-making and notes how equity and justice considerations are informing planning efforts in a few US locations.

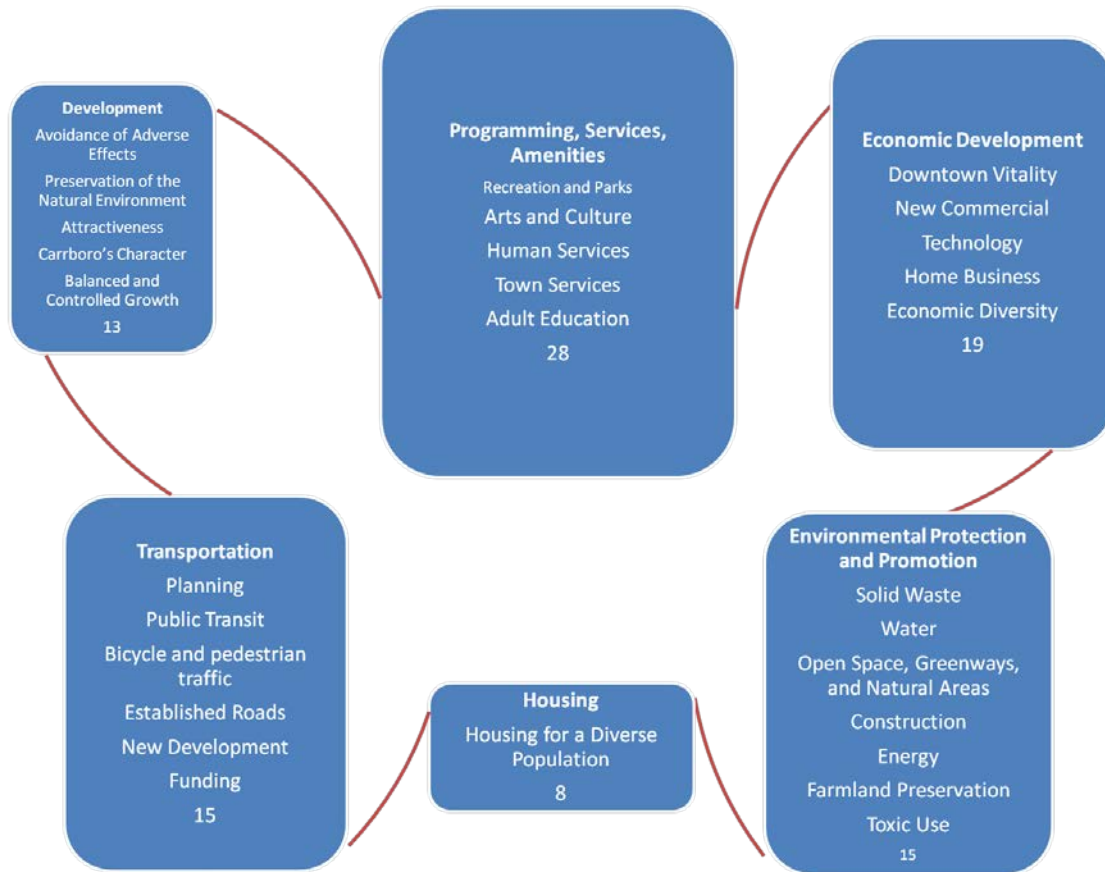


Figure 1. Policy Areas/sub topics (#s represent the number of policy statements)

The Introduction to the Carrboro Vision2020 document is as follows:

Vision2020 is a policy-making document for the Town of Carrboro to use in the planning of its future. It is a caretaking tool, as well, designed to preserve the Town's history and qualities in an atmosphere of desirable growth.

This document reflects the direct input of over 100 Carrboro citizens. Every man, woman and child in Carrboro was invited to participate in a facilitated, citizen-based brainstorming session on March 25, 2000. Nearly 100 citizens chose to participate that morning. At this session, citizens were encouraged to draw, write, and verbally express their hopes, dreams, and visions for their community.

Hundreds upon hundreds of ideas were generated and an overall vision for the future began to emerge based on this citizen input. The Steering Committee, which consisted of representatives of all of the town's advisory boards plus several citizens-at-large, then took this emerging vision and crafted the following document.

The process by which the Vision 2020 policies were developed reflects the town's commitment to crafting policies that reflect the will of the citizens after a great deal of input and discussion. The Committee wishes to thank all of the participants in Vision2020.

The Board of Aldermen adopted Carrboro Vision2020 as nonbinding policies towards growth and development. Soon after its adoption, Carrboro Vision2020 was put to use, launching other efforts ranging from studies to implement its Zero Waste policy, to the Downtown Visioning effort that identified interest in allowing additional building height, updating parking standards and coordinating parking space management, and renewed and continued interest in a County-based community college and Carrboro-based library, among others. Searches of Board meetings before and since 2013 yield hundreds of references to the document and verify the extent to which the aspirations and intentions captured have been considered, evaluated, and achieved.

Specific, extensive evaluations of the document have also taken place. In 2007, a review of the Vision2020 (2000) in relation to the Facilitation Small Area Plan for Carrboro's Northern Study Area (1999) and Downtown Carrboro: New Vision (2002) was completed. In 2010, a policy-by-policy report was provided for the Board's retreat (*Attachment E*), and in 2014, a focus on how Vision2020 has informed joint efforts, particularly related to the Chapel Hill Carrboro City Schools, was shared with the Board of Education.

The Board's Strategic Priorities encapsulate the overall interests expressed in Vision2020:

- 1. Diversify revenue stream to maintain ethnic and economic diversity*
- 2. Protect historic neighborhoods and maintain Carrboro's unique identity*
- 3. Improve walkability and public transportation*
- 4. Encourage development that is compact, dense, and appeals to diverse lifestyles and incomes*
- 5. Enhance and sustain quality of life/place issues for everyone*

A fair and impartial point of view is noted as fundamental to John Rawls' perspective of 'justice as fairness.' The SEPs overview (linked above) of these concepts describes historical background, definitions and principles in relation to other theoretical frameworks seeking to explain individual and social behaviors.

Social justice is not referenced, per se, in Vision2020 or the strategic priorities, but is more directly referenced in policy and planning efforts elsewhere. A few local governments that are specifically developing tools to use in planning/policy development and implementation are noted below.

City of Seattle Racial and Equity Analysis and Toolkit

http://www.seattle.gov/dpd/cs/groups/pan/@pan/documents/web_informational/p2273983.pdf (*Attachment F*)

http://www.seattle.gov/Documents/Departments/RSJI/RacialEquityToolkit_FINALE_August2012.pdf (*Attachment G*)

King County Washington Equity and Social Justice Initiative -

www.kingcounty.gov/elected/executive/equity-social-justice.aspx (*Attachment H*)

Muscatine Iowa Social Justice Intervention Plan

<http://www.muscatineiowa.gov/DocumentCenter/View/10736> (*Attachment I*)

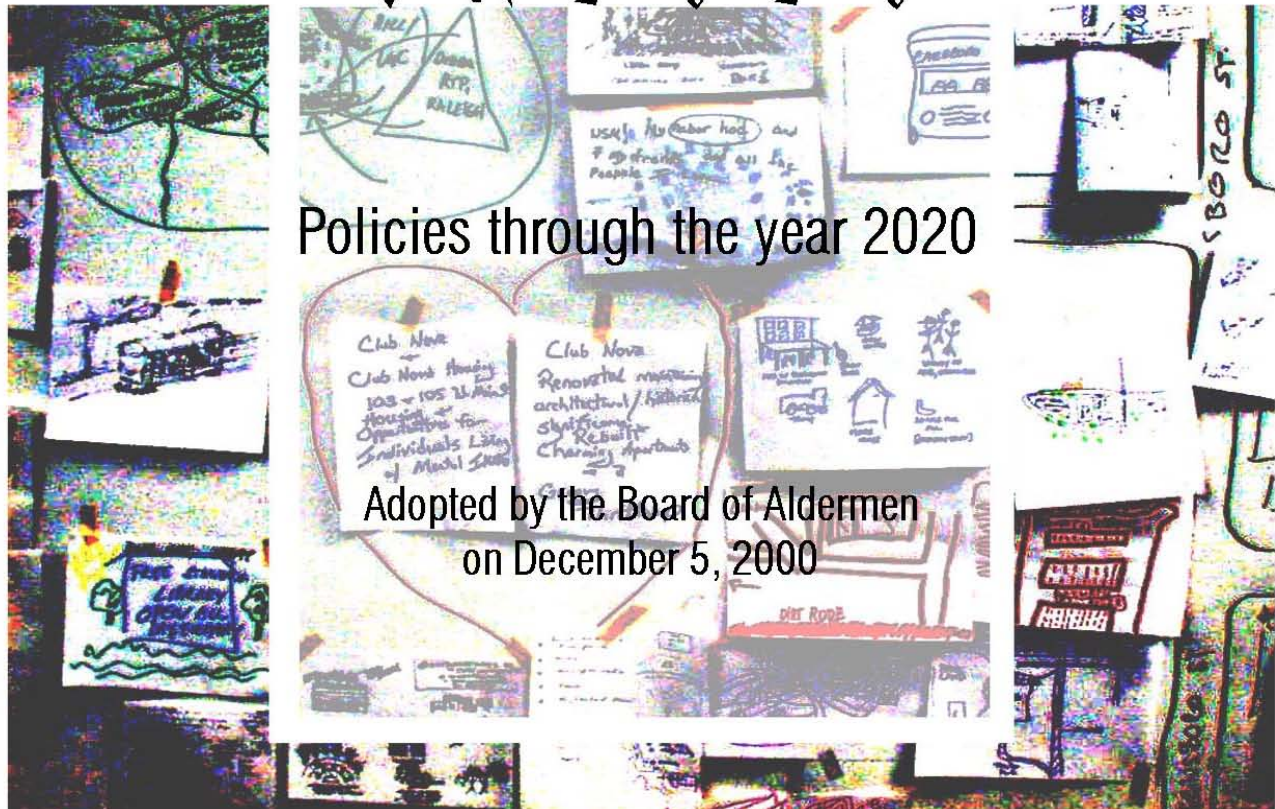
It will be noted that these tools are customized to each particular place, its history, needs, and vision – there does not appear to be a standard format in use at present. A point of beginning for the Town, should movement in this direction continue, will be defining the terms and parameters so that data collection and monitoring/measurement could also be developed. Direction from the Board regarding its interest in doing so is requested.

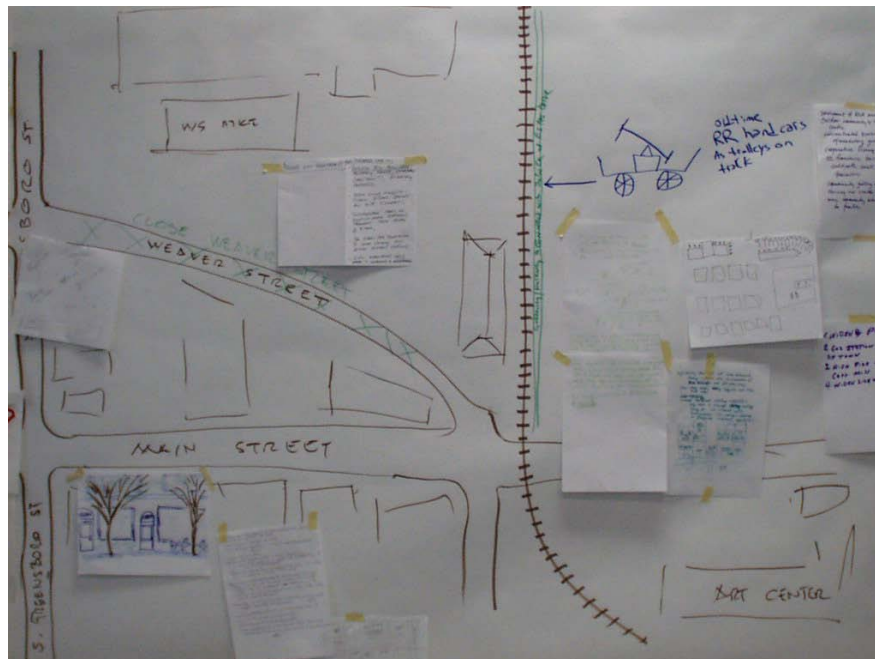


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Policies through the year 2020

Adopted by the Board of Aldermen
on December 5, 2000





Acknowledgments

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Introduction

Vision2020 is a policy-making document for the Town of Carrboro to use in the planning of its future. It is a caretaking tool, as well, designed to preserve the Town's history and qualities in an atmosphere of desirable growth.

This document reflects the direct input of over 100 Carrboro citizens. Every man, woman and child in Carrboro was invited to participate in a facilitated, citizen-based brainstorming session on March 25, 2000. Nearly 100 citizens chose to participate that morning. At this session, citizens were encouraged to draw, write, and verbally express their hopes, dreams, and visions for their community.

Hundreds upon hundreds of ideas were generated and an overall vision for the future began to emerge based on this citizen input. The Steering Committee, which consisted of representatives of all of the town's advisory boards plus several citizens-at-large, then took this emerging vision and crafted the following document.

The process by which the Vision 2020 policies were developed reflects the town's commitment to crafting policies that reflect the will of the citizens after a great deal of input and discussion.

The Committee wishes to thank all of the participants in Vision2020.

Contents

Acknowledgements	3
Introduction	5
Vision2020 Policies	9
1.0 Programming, Services, and Amenities	9
1.1 Recreation and Parks	9
1.2 Arts and Culture	9
1.3 Human Services	10
1.4 Town Services	11
1.5 Adult Education	11
2.0 Development	12
2.1 Avoidance of Adverse Effects on Public Health and Safety	12
2.2 Preservation of the Natural Environment	12
2.3 Attractiveness of the Developed Environment	13
2.4 Carrboro's Character	13
2.5 Balanced and Controlled Growth	13
3.0 Economic Development	14
3.1 Nature of Development	14
3.2 Downtown Vitality	14
3.3 New Commercial Growth	15
3.31 Shopping Centers	15
3.4 Technology	15
3.5 Home Businesses	15
3.6 Economic Diversity	16

4.0 Transportation	16
4.1 Planning	16
4.2 Public Transit	17
4.3 Bicycle and Pedestrian Traffic	17
4.4 Established Roads	17
4.5 New Development	17
4.6 Funding	17
5.0 Environmental Protection and Promotion	18
5.1 Solid Waste	18
5.2 Water	18
5.3 Open Space, Greenways, and Natural Areas	18
5.4 Construction	19
5.5 Energy	19
5.6 Farmland Preservation	19
5.7 Toxic Use	19
6.0 Housing	19
6.1 Housing for a Diverse Population	19
Appendix A: Summary of Ideas from March 25, 2000 Community Forum	21
Appendix B: Scenarios of Life in the Year 2020	33
Appendix C: Amendments.....	35

Vision2020 Policies

1.0 PROGRAMMING, SERVICES, AND AMENITIES

Many of Carrboro's existing programs and services were examined by the Vision2020 Steering Committee. Recreation and parks, arts and culture, human services, and such critical town services as police, fire, and public works contribute greatly to the quality of life in Carrboro. As such, these programs and services deserve the town's ongoing support.

1.1 Recreation and Parks

Carrboro's recreation and parks amenities play a large role in our citizens' quality of life and sense of community. Carrboro citizens have identified a need for public places where citizens can meet and mingle. Citizens have also identified a need for locally available activities for young adults which can be easily accessed by various transportation modes.

- 1.11** The town should encourage and support the development of greenways and parklands dedicated to public use along streams and easements. There should be a network of connected greenways throughout the town. These greenways should serve as nature trails, biking and walking trails, wildlife corridors. All should protect our natural environment.
- 1.12** The town should continue to maintain existing parks and anticipate the need for more parks and recreation facilities. There should be a park or play field within walking distance of every residence in Carrboro.
- 1.13** The town should fund and implement the Recreation and Parks Master Plan, developing a long-range financing plan to fund recreation needs. Payment-in-lieu funds, state and federal grants, and local revenue could all be considered. The town should seek to collaborate with neighboring towns, Orange County and the school board for the joint provision, purchase and operation of recreational facilities.
- 1.14** Recreation programming should be expanded, with a broader range of programming for all interests and age groups (youth, adults, and seniors). Carrboro citizens express a strong desire for a town pool, an outdoor theatre/amphitheater, soccer fields, dance space, and a gymnasium. There should be music in the parks regularly, lots of activity at the Century Center, and a kids' park.
- 1.14** The town should practice and encourage ecologically sound and sustainable maintenance of open space, including parks and greenways.

1.2 Arts and Culture

Art and culture play a very large role in Carrboro's distinctive appeal. Carrboro is an integrated community. We need to understand each other, accept each other, appreciate

each other, interact with each other, work, live, and recreate together. Much town pride is evident at community gatherings. The town should continue to encourage and support artistic and cultural activity. The town should also take measures to ensure that the public transportation system enables our citizens to take advantage of the cultural and educational opportunities available at UNC-Chapel Hill.

- 1.21 The town should plan and support regular music events and festivals in our parks and the Century Center. Additionally, the town should complete the bandstand at the Town Commons for regular concerts and artistic events.
- 1.22 The town should support a centrally located and conveniently accessible library.
- 1.23 The Carrboro Century Center should be developed to its fullest potential. This facility, complementing the ArtsCenter, should become the cultural center of Carrboro, drawing people downtown, creating a sense of place, and serving all citizens.
- 1.24 The town should support efforts to honor and celebrate the diversity of our citizenry through activities at the Century Center, and by supporting cultural centers, festivals, and musical and arts events.
- 1.25 The town should continue to support, as well as encourage its residents to support, the ArtsCenter, which is an integral part of the town's cultural life.
- 1.26 The Town should preserve and celebrate its history through continuing installations and display and continued support of Carrboro Day.
- 1.27 The town should support, fund and purchase public art, including sculpture and murals, and encourage public art projects like The Public Gallery of Carrboro's Art on Weaver.
- 1.28 The town should encourage year-round use of its nationally acclaimed Farmer's Market. While seasonal use will vary, the town should also encourage additional, compatible uses, such as a regular crafts and arts market.
- 1.29 A celebration should be developed in which art galleries, the town, and local restaurants sponsor arts-related activities on a regular basis.

1.3 Human Services

Carrboro citizens are vocal in their concern for each other. Our citizens also desire the security of knowing how their town works, thereby facilitating our delivery of human services.

- 1.31 The town should continue to look for unmet needs, to inform the Orange County Commissioners of those needs, and to urge them to address those unmet needs.

- 1.32 The town should continue to support human service needs that are above and beyond those met by the County.
- 1.33 The town should develop a comprehensive plan for supporting the needs of special populations, including senior citizens and immigrants, in which these populations identify their needs rather than the community at large. Such a plan would focus particularly on transit needs easy access and proximity to health care and integration into the greater community.
- 1.34 The town should follow through on citizens' interest in maintaining a senior center in Carrboro.
- 1.35 The town should consider the impact of its ordinances and policies on the wellbeing of its most vulnerable citizens, including the elderly, children, those with disabilities and those living on low-, middle-, or fixed incomes.

1.4 Town Services

The Town plans to utilize electronic technology to the fullest in order to be a "Community on the Web." Access to public documents and community updates should increase flexibly and swiftly in response to changing community needs.

- 1.41 Carrboro should encourage paperless transactions to minimize solid waste disposal. All town services should be made available on-line, including information, town forms, ordinances, and payments.
- 1.42 Carrboro town staff should remain dedicated to fast, efficient public service, employing new technologies and skills toward increasingly cost-effective and environmentally friendly town services.
- 1.43 Carrboro should continue to provide a high level of police, public works and fire service to its citizens.
- 1.44 The town should continue to seek opportunities to exercise more local control of revenue options and community health and welfare options.
- 1.45 The town should continue to encourage the active participation of its citizens in community planning.
- 1.46 Carrboro should continue its efforts towards community building by encouraging the use of facilitation and conflict resolution. The town should also seek alternatives or supplements to the traditional public hearing format when controversial issues are before the Board.

1.5 Adult Education

- 1.51 The town should work to bring a community college to the area.

- 1.52 The town should create a "Communiversiity" to provide learning opportunities at all stages of life. With adult students and retirees in mind, one model for this program might be Elderhostel.
- 1.53 The town should promote the Century Center's adult education offerings and use this facility to its fullest potential as a venue for educational opportunity.

2.0 DEVELOPMENT

Carrboro's development should take place in a manner consistent with a set of adopted values. The health and safety of citizens should be protected. Respect for and protection of the natural environment should be integrated into the town's policies as a high priority in enriching the quality of life. As much as possible, Carrboro's town character should be preserved; and the town should respond to citizen initiatives toward that goal. The community should continue to foster diversity, welcoming people of all races, ages, ethnicity, sexual orientations, and social and economic backgrounds. Growth should occur in a balanced fashion, and at a rate that does not jeopardize the values set forth by Vision2020. The interests of all members of the community, including property owners, neighbors, and other interested citizens should be considered when making development decisions.

2.1 Avoidance of Adverse Effects on Public Health and Safety

- 2.11 Infill development should take place in a manner that fulfills the town's goals and enhances neighboring areas. The town should develop policies that mitigate the adverse impact of infill development, with particular consideration given to roads, sidewalks, and aesthetic compatibility. The town should develop a process to mediate disagreements between developers and residents of existing neighborhoods.
- 2.12 The town should limit development in sensitive areas such as the watershed, wetlands, and other areas the development of which could adversely affect water supplies and habitat. The town's restrictions on development within the University Lake Watershed should be retained and enforced.

2.2 Preservation of the Natural Environment

- 2.21 The Town should continue to require the preservation and maintenance of open space when land is developed, to enforce restraints on clear-cutting, and to require adequate buffers.
- 2.22 Where development is deemed acceptable, there should be well defined dense development with areas of well preserved open space.

- 2.23** The town encourages the planting of native plant species, as well as non-native species that are not invasive. Removal of invasive species is encouraged. The town supports education on this topic and encourages the public to become aware of the list of invasive plant species found in Appendix E-17 of the Town of Carrboro Land Use Ordinance.

2.3 Attractiveness of the Developed Environment

- 2.31** The town should continue to encourage developers to apply adopted downtown design guidelines when planning and building new structures in the downtown area. Additionally, the town should continue to encourage developers to follow architectural guidelines for residential property. The town should periodically revisit the architectural guidelines to evaluate their effectiveness and their impact on other policy areas (See 2.52 and 6.0).
- 2.32** New development that blends single-family and multi-family units should be designed and landscaped to ensure compatibility.

2.4 Carrboro's Character

- 2.41** The town should support the evolution of a downtown district that embodies Carrboro's character. The downtown district should have medium-rise buildings appropriately sited with adequate public access, and it should provide shopping opportunities that meet our citizens' everyday needs. The downtown should remain a center for the community where people work, gather, shop, socialize and recreate. The Century Center should serve as a focal point for the downtown.
- 2.42** Development throughout Carrboro should be consistent with its distinctive town character. The town should adhere to policies that limit the widening of roads, encourage plantings alongside roads, preserve historic areas, buildings and older neighborhoods, and retain unspoiled green spaces and other natural areas.
- 2.43** Carrboro should plan and encourage the growth of tree canopies over roads to mitigate the heat and smog effect caused by superheated pavement. Carrboro should strongly encourage the electric utilities to put their lines underground to allow for full canopy coverage.

2.5 Balanced and Controlled Growth

- 2.51** The town should support the implementation of our Small Area Plan.
- 2.52** The town should continue to require the construction of a diverse housing stock.

- 2.53** Careful attention should be paid to the carrying capacity of the existing infrastructure as growth occurs.

3.0 ECONOMIC DEVELOPMENT

With the population of Carrboro expected to increase during the Vision2020 period, additional commercial development should be anticipated both downtown and in peripheral areas. Carrboro should seek to reduce the tax burden on single-family owners by increasing the percentage of commercial space in town.

3.1 Nature of Development

In the interest of environmental preservation, new commercial development must minimize negative environmental impact, it must emphasize appropriate buffers, and it must not compromise the integrity of established neighborhoods.

3.2 Downtown Vitality

Downtown Carrboro should be nurtured as the social, cultural and economic center of our community. The downtown should include public social spaces as well as a mix of business types.

- 3.21** The town should develop a plan to govern the continuing development of downtown. Toward this end, the town should adopt the following goals:

- To double commercial square footage in the downtown from that existing in the year 2000.
- To accommodate additional square footage by building up, not out.
- To increase the density of commercial property in the downtown area.
- To improve the downtown infrastructure (e.g. parking facilities, sidewalks, lighting, shading) to meet the needs of the community.
- To develop transit and traffic initiatives which enhance the viability of downtown.

- 3.22** Carrboro should encourage the development and placement of architecturally significant commercial and civic buildings.

- 3.23** Other downtown commercial activity could include restaurants, entertainment venues, technology companies, lodging, and offices.

- 3.24** Frequent, accessible public transit is necessary for a thriving downtown. Multi-modal access to downtown should be provided. As traffic increases, Carrboro should consider perimeter parking lots served by shuttles to bring people downtown.

- 3.25 Walkability should be encouraged downtown and pedestrian safety and comfort should be a goal. The town should improve lighting and shading, and create auto barriers.
- 3.26 Carrboro should continue to use the revolving loan fund to support the development of locally owned and operated businesses and encourage micro-enterprises through education and loans.
- 3.27 Carrboro should consider pedestrian-only spaces downtown.
- 3.28 Carrboro encourages a variety of appropriate residential developments – single-family, multi-family, SROs, et cetera – in the downtown especially as part of mixed-use developments.

3.3 New Commercial Growth

Opportunities for new commercial growth exist primarily in four areas: downtown, across from the Carrboro Plaza Shopping Center, within the commercial core of a village mixed-use development, and within new office/assembly conditional use developments. The latter two options are most obviously appropriate in the transition areas, but may be approved throughout the town's jurisdiction.

3.31 Shopping Centers

- 3.311 Before creating new shopping centers, the town should encourage those that exist to maximize their potential by adding stories when and where practical.
- 3.312 All shopping centers should be connected to residential areas with increased pedestrian access.

3.4 Technology

- 3.41 The town should research ways to support telecommuting.
- 3.42 Carrboro should continue to explore new technologies and should actively recruit private companies to supply Carrboro with the most up-to-date technology available, encouraging its distribution throughout the town.
- 3.43 Carrboro should help local businesses grow and expand by taking full advantage of the Internet and other new technologies that become available.

3.5 Home Businesses

Carrboro should encourage small, low-impact home businesses. The town should revise ordinances to remove any unnecessary obstacles to appropriate

home businesses, and should encourage developers to accommodate home businesses in all new developments.

3.6 Economic Diversity

- 3.61** While our citizens may not be able to meet all of their consumer needs in Carrboro, it is important that the town encourage the widest possible diversity of locally operated businesses. The objective is a balanced portrait of convenience: a movie theater, overnight accommodations, home businesses, technology, retail, a variety or department store, restaurants and entertainment.
- 3.62** Carrboro is a town rich in economic diversity. The town should strive to continue this tradition by adopting ordinances and policies that recognize diverse employment types and pay scales.
- 3.63** The town should encourage the development of underutilized property in the downtown area.

4.0 TRANSPORTATION

The safe and adequate flow of bus, auto, bicycle and pedestrian traffic within and around Carrboro is essential. The public transit system serves to encourage non-auto travel and reduce congestion on existing roads. The town's Land Use Ordinance and economic development policies both address traffic flow in this expanding municipality.

4.10 Planning

- 4.11** The Town of Carrboro should adopt a comprehensive transportation plan. The plan should address population growth projections for the town, its planning jurisdiction and expected growth in adjoining jurisdictions.
- 4.12** The Town should continue to implement its connector roads policy.
- 4.13** The town should cooperate with Chapel Hill and other regional entities in a comprehensive transportation plan to include: regional transit service conducted by the Triangle Transit Authority, seamless connections among all the region's public transit systems, and shorter routes and more frequent service
- 4.14** Carrboro should support a passenger rail connection between the Horace Williams' property, through Carrboro's downtown, and the main campus of the University of North Carolina at Chapel Hill.
- 4.15** As public transit routes are identified, the town should locate new high-density development along such routes through changes to the zoning ordinance and map.

4.2 Public Transit

- 4.21** The system should continue to facilitate access to youth activities and special events and educational opportunities at UNC-Chapel Hill and should enhance access to employment opportunities. Additional park and ride lots should be built for easy public transit access.
- 4.22** Carrboro should expand its participation in organization and planning for the community bus system and continue in its efforts to share the costs of the system equitably with Chapel Hill and the University. Costs of the system should be subsidized by federal and state grants as well as appropriated town revenues.
- 4.23** The town should support transportation services that meet the special needs of its disabled citizens.

4.3 Bicycle and pedestrian traffic

- 4.31** The town should fully implement its bicycle and pedestrian network plan. This plan should identify links needed now as well as links that will be needed by 2020.
- 4.32** The town should establish connections with bicycle and pedestrian ways in other jurisdictions.
- 4.33** The maintenance of these paths and ways should continue to be a high priority.

4.4 Established Roads

- 4.41** As a general policy, established roads should be widened to accommodate bike lanes and sidewalks, but not to provide additional lanes for automobiles.

4.5 New Development

- 4.51** The town should continue to require developers to install sidewalks and bicycle paths in new developments.
- 4.52** New developments should bear the costs of upgrading connector and arterial facilities in the areas adjacent to their properties to the extent appropriate, including upgrades to serve pedestrians and bicycles, given the added load to the infrastructure and anticipated use of facilities.

4.6 Funding

- 4.61** The comprehensive transportation plan should propose and recommend alternative funding mechanisms to finance infrastructure improvements.

5.0 ENVIRONMENTAL PROTECTION AND PROMOTION

The town should serve as a leader in protecting the environment and protecting its residents.

5.10 Solid Waste

5.11 The town should aim to recycle all solid waste as a “No Waste” community, and should devise strategies to minimize landfill waste. The town should encourage source reduction through all available means (e.g. mandatory or “pay as you throw” collection of recyclables).

5.12 Carrboro should develop and encourage a network of neighborhood composting facilities. The town should also explore the creation of a town compost heap that would benefit the community’s gardeners.

5.13 Recycling facilities should be readily available throughout the town.

5.14 The town should investigate ways to increase the life span of the current landfill.

5.15 Carrboro should work with the county to educate all citizens about waste reduction. Creative, non-traditional programs, such as turning garbage into art, should be pursued.

5.20 Water

5.21 Carrboro should work with OWASA to develop the policies and infrastructure necessary for water conservation (e.g. encourage the re-use of grey water, replacing fixtures with low-flow models, and collecting stormwater for watering gardens).

5.22 Carrboro should adopt a strategy and set of policies to protect all of our creeks, streams, ponds, and lakes.

5.23 Carrboro should be proactive in managing its stormwater, promoting active maintenance of facilities, reducing impacts of increased impervious surface, and minimizing impacts on waterways.

5.30 Open Space, Greenways, and Natural Areas

5.31 Carrboro should work to preserve open space and greenways through all available means, such as direct purchase, conservation easements, donations, and federal and state grants.

5.32 The town should map a connected series of greenways that are large enough to serve as wildlife corridors.

5.40 Construction

- 5.41** The town should encourage the reduction of waste materials in the course of new construction or renovation. The town should promote, be a leader in, and require, where practical, the use of recycled building materials, recycling plans for construction and demolition materials, and the extent to which “green building” techniques are being employed.

5.50 Energy

- 5.51** The town should publicly promote every available means of energy conservation. The town’s own alternative and renewable energy targets should include passive and active solar, and composted waste co-generation to fuel public vehicles and the heating of town facilities
- 5.52** The town should set a goal of reduced energy costs in all town buildings and increased fleet mileage for all town vehicles.

5.6 Farmland Preservation

- 5.61** The town should adopt incentives to help limit the conversion of farmland to developed uses that bridge the transition areas. These incentives should be designed to preserve small farms, farm co-ops, and organic farming within new conservation subdivisions and elsewhere.

5.7 Toxic Use

The town will work to reduce its use of hazardous and toxic products in town operations and will expand, promote, and provide public education on such efforts as with its least toxic integrated pest management policy.

6.0 HOUSING

The town should develop a comprehensive housing policy that seeks to provide housing for all of Carrboro’s citizens.

6.1 Housing for a Diverse Population

- 6.11** Town policy should accomodate a variety of housing styles, sizes and pricing. It should also address issues of density, funding and rezoning to allow for more non-detached housing, mixed-use development, and communal living options.
- 6.12** The variety of strategies to be considered should include the investigation of alternative public and private funding for construction and renovation of low and moderate income housing. A low interest loan pool for individuals and nonprofits that wish to buy and rehabilitate housing is desired.

- 6.13** The town should review all vacant municipally owned land for the purpose of making unneeded tracts available for housing programs.
 - 6.14** The town should continue to advocate for inclusionary zoning techniques to increase the local stock of affordable housing.
 - 6.15** The town should pursue the development of density bonus provisions for projects incorporating environmentally sensitive development and building practices.
 - 6.16** With our growing population of senior citizens, the town should support the creation of more housing that allows our senior citizens to interact fully with the larger community. Senior access to public transit will become an increasingly important concern.
 - 6.17** The town should interact with non-profit groups that work to provide affordable housing, including but not limited to the Land Trust, Orange Community Housing Corporation, Empowerment Inc., and Habitat for Humanity.
 - 6.18** A minimum of 15 percent of the residential units in any residential development should meet the affordability criteria specified in Section 15-182.4 of the Carrboro Land Use Ordinance.
-

APPENDIX A:

SUMMARY OF IDEAS FROM MARCH 25, 2000
COMMUNITY FORUM

CATEGORIZED INTO MAJOR TOPIC AREAS

Downtown Issues

1. Downtown should be a vibrant social, cultural and economic center
2. Downtown should include a central square/public social spaces
3. The town should encourage technology enterprise
4. Walkability should be encouraged downtown
5. The town should encourage/allow greater intensity downtown to create greater variety
6. The town should encourage the following types of businesses (B&B's, Outdoor Cafes,
7. There should be a balance between retail and other commercial enterprises (restaurants, entertainment, offices, etc)
8. There should be a recycle, re-use store in Carrboro
9. The town should develop a comprehensive, master plan for downtown which would look at expanding our infrastructure and creating more intensive uses of existing lots (including an audit of available space)
10. The town should encourage locally-owned businesses as opposed to chains
11. The town should improve public transit so citizens can better get to downtown
12. Carrboro needs a pool hall downtown
13. The town should balance chains with locally owned businesses
14. Citizens should be able to buy practical, every day items (like socks and underwear)
15. Carrboro needs a book store
16. Downtown transit loop/shuttle
17. There should be a downtown/general information center
18. Sheltered outdoor areas
19. Develop commercial areas with high density, multi-use, residential use, and easy access
20. From Basnight's to Chapel Hill Town line, there should be dense development
21. Community shopping carts, bikes, and golf carts
22. Close Weaver Street and make it into a town park and town square
23. Walkable commercial area
24. Significantly placed and designed commercial and civic buildings
25. Multi-modal access to downtown
26. Infill in existing commercial areas
27. Raise height limits; build to three stories
28. Apartments over storefronts (ie Carrboro Plaza)
29. Weaver St. as pedestrian mall
30. There should be perimeter parking lots that are served by shuttles to bring people downtown
31. Extend use time for all businesses

Economic Development

1. Carrboro should be economically diverse
2. Carrboro needs a movie theater
3. Increase commercial space in Carrboro
4. Artists and artisans should make up part of the commercial space
5. More light industry in the cement plant area

6. Redesign Carrboro Plaza--3 stories with pedestrian bridge across 54, mixed-use comm. space
7. Add stories to all single-story shopping centers
8. All shopping centers should be connected to living areas
9. There should be more home businesses
10. Encourage higher density commercial development to reduce the tax burden on citizens
11. More gas stations
12. Continue to support the technology businesses; Carrboro should become a "silicon gulch"
13. Increase commercial space so that existing businesses have room to expand
14. Redevelop existing shopping centers for mixed-use
15. Technology available--small, low impact, home-based businesses
16. Rezone for more at-home businesses
17. There should be small-scale mixed-use in outlying neighborhoods
18. The town should do everything necessary to support telecommuting
19. Encourage small businesses w/ internet marketing
20. The town should work to attract good corporate citizens
21. People's daily needs should be able to be met in Carrboro
22. There should be many levels of job types
23. "Underground" commercial in Calvander

Transit/Public Transportation

1. Increase hours and decrease headways of the buses
2. Improve community walkability
3. Construct more bikeways
4. Utilize the rail corridor from UNC to the Horace Williams tract thru Carrboro (Carrboro neighborhoods would have access)
5. Underpasses and overpasses for citizens
6. The town should plan pedestrian only spaces
7. Electric tram car from Carrboro to Chapel Hill
8. Close Old Pittsboro Rd. to traffic
9. Free, accessible public transport for seniors
10. Develop a transportation action plan that supports multi-modal transportation w/ off-road bikepaths
11. Two-lane maximum on all roads
12. There should be tree canopies over roads
13. Automated parking garages (no attendants, more efficient, uses less room)
14. Sky lift from Anderson Park to downtown
15. It should be easy for people with disabilities to get around Carrboro
16. There should be free yellow bikes around town for all to use
17. Local transit should be fully integrated into a regional transit system
18. Rapid rail mass transit should be available by 2020
19. There needs to be regional co-operation with transit
20. Transit that operates at night and with shorter headways
21. Trains into Carrboro

22. Free public transit and short routes
23. Pedestrian Access & bikeways network
24. Frequent van service/shuttle around the entire town
25. Carpool in alternative fuel vehicle on smart highway
26. Light rail stops in Carrboro connecting to the rest of the region
27. Total connectivity
28. Public work vehicles should adapt to our roads, instead of vice-versa
29. There should be a smaller scale bus service for shopping
30. Express bus service with separate bus lanes
31. Better marketing of the bus system
32. Limit parking lot sprawl, have small decks
33. Non-polluting buses
34. Bike-to-Rail
35. Walk-to-Rail
36. Automobile and traffic control
37. Mixed zonings to encourage walking
38. Pedestrian Access & bikeways network
39. Construct a town canal
40. Increase pedestrian comfort--shading, lighting, auto barriers

Resource conservation

1. Re-use water/grey water
2. Recycle all solid and hazardous waste
3. Purchase open space and conservation easements
4. Nature Center at the old landfill
5. The town should outlaw disposables
6. The town should encourage neighborhood composting
7. The town should require that construction utilize recycled building materials
8. Provide recycling for consumers in the commercial areas of town (shopping centers, downtown)
9. Pursue Land-fill mining
10. The town should educate citizens about reducing waste
11. Carrboro should encourage source reduction
12. Create town compost heap
13. Use waste (such as, town compost heap) to generate energy which could be sold
14. The town should buy conservation easements along Old 86
15. "No Waste Carrboro:" The town should set a goal of recycling/re-using all waste without shipping out
16. There should be solar panels on building in Carrboro
17. Maybe there should be no gas stations=alternative fuels
18. Greenbelt with bikeways, parks
19. Ban garbage disposals in home

20. Construction waste should be dealt with on site
21. Recycle stormwater for watering gardens
22. Operate a public utilities
23. Alternatives to fossil fuels
24. Tree canopy
25. Wild-life corridors
26. Intelligent building design
27. All household materials recycled
28. Hazardous materials shipped out of county
29. Home/neighborhood composting
30. Preserve Calvander through by supporting farms and farm co-ops
31. Support local, small-scale agriculture
32. Create a linear park along Old 86 north of Carrboro
33. Removal of exotic/invasive plants
34. We should have clean air and clean water
35. Ban on disposable packaging
36. Protect Bolin Creek
37. Carrboro should be a "NO WASTE" community
38. Zero cost of energy in town buildings
39. Town swimming pool heated with gases from compost or energy from incinerators
40. The town should promote green building techniques
41. Public utility for waste management
42. More recycling containers on sidewalks
43. Mandatory recycling
44. Turn garbage into art
45. Carrboro salvage shed
46. Ban recyclables at landfill
47. Town should educate citizens about recycling and waste reduction
48. We should fill the town with trees
49. The town should become a public utility selling green energy (solar, biomass)
50. New paradigms for production, use
51. The town should promote the re-use/recycling of water
52. Pay-as-you-throw garbage collection

Social & Cultural Needs

1. There should be activities for senior citizens and youth with integrated programs and facilities
2. The town should encourage and plan many activities downtown
3. The town should encourage and support ethnic, cultural, and housing diversity
4. Expand economic activities
5. Public art collections, particularly supporting new and emerging artists
6. There should be a town green/square with concerts, etc
7. Free-standing library in Carrboro
8. Lots of activities at the community center

9. Year-round Farmer's Market
10. The integrity of older neighborhoods (like Lloyd St/Broad St.) should be preserved
11. There needs to be a central public space in town
12. Carrboro needs a diverse housing stock
13. Smaller lots, smaller houses
14. There should be a youth run business in Carrboro
15. Child Day Care center located in or next to a senior center so the seniors could participate in the childcare
16. When you get there, there is a "there" there
17. Carrboro's own community access TV
18. Film festivals
19. Store front radio (run by kids?)
20. Diversity--businesses downtown, affordable housing
21. Co-operative efforts--volunteers have a central place to learn of needs/opportunities to do good works
22. More people should work from home
23. Wholeness, Integration
24. Training from young age onward for non-academic pursuits (such as vocational)
25. Be able to live and work in this community (affordability)
26. Be able to shop in the community from small businesses and not chains
27. Create an arts space where people can come to see films, theater, art, drink coffee, and talk
28. Provide a general store through the creation of a diversified shopping area--a Carr Mill Mall-style motif with several types of stores and a community center
29. Community baby-sitting service
30. Build Carrboro Community College
31. Multi-cultural activities at the community center
32. Foster a "First Friday" Celebration like in Raleigh (arts on the first Friday night of the month)
33. The town should sponsor "communities days:" days we come together and clean our town and improve our community
34. community gardens
35. communiversity
36. There should be a commitment to preserve Carrboro's multi-cultural community, not an elitist art or other community
37. Annual local poetry anthology
38. There needs to be community gathering places and community events
39. There should be easier access for citizens to child-care and elder care
40. Develop Carrboro with sensitivity to existing people and institutions
41. Public art everywhere
42. Cultural and language institute in Carrboro
43. Beautiful plantings around public buildings
44. Homeless shelter downtown
45. Cultural Centers for honoring ethnicities

Recreation and Parks

1. Create a Park on the old Landfill
2. There should be a clock tower on the community center
3. Ampitheatre
4. Gardens
5. There should be regular musical activities in the local parks
6. The town should build nature trails on the Horace Williams tract and the Adams tract
7. Kids park
8. Carrboro needs an olympic-size swimming pool
9. The town should plan after school programs for children, particularly at the new comm. center
10. There should be a hands-on learning resource/museum center (like Exploris in Raleigh)
11. Renovate Sparrow's Pool
12. Build a park or nature center next to Sparrow's Pool
13. Children's activity center (movies, puppet theater, children's theater)
14. Activities for seniors in the new community center
15. There should be a play field within walking distance of each residence
16. Outdoor theater
17. There should be more downtown recreation/town center
18. Community Pool with Pavilion
19. Expand parks and recreation with greenways, museums, fields, pool
20. Carrboro Canal
21. Solar-powered fountain
22. Gymnasium
23. Soccer fields

Decrease Tax Burden on residential payers

1. Merge services with Chapel Hill
2. The town should pursue other sources of revenue such as restaurant, entertainment, and hotel taxes
3. Increase Density
4. Increase Retail (and thus retail tax revenue)
5. Collect taxes on e-commerce
6. The town should aggressively pursue federal and state grants
7. Voluntary increase of tax base so that residents could donate more towards town
8. UNC should pay their fare share
9. Reduce costs by applying technology to our benefit (reduce waste disposal, need for svcs, etc)
10. Promote denser development
11. Lease out our services to other communities
12. Get more businesses in town

13. Two-tiered taxing system
14. Encourage public-private partnerships
15. Encourage businesses that will provide opportunities without adverse impacts
16. Town lottery to pay for services
17. Reduce personnel and infrastructure through technology
18. Reduce costs by co-ordinating with other local and county governments

Housing

1. The town should encourage "granny flats"
2. The town should encourage the building of more condos, town houses and duplexes
3. The town should encourage senior housing initiatives that are integrated into the community
4. The town should encourage different ways of building houses (modular homes) to encourage affordability
5. Renovate Club Nova to provide 12 apartments for the very poor
6. Encourage home occupation and home ownership
7. Emphasize non-detached housing with shared green space
8. Develop policies that encourage creative solutions to affordable housing, including private/public ventures
9. Encourage mixed-use and higher density housing development
10. Support a land trust to keep housing affordable
11. Communal living options
12. Group homes with a communal kitchen
13. Work with churches to have homes for the elderly
14. There should be a range of housing options and costs

Development

1. There should be a clustered village north of Calvander with a commercial center, an artisan center, bookshop, café, and a performing arts center (all accessed by various bikepaths)
2. The town should enforce it's small area plan
3. Absolutely no strip development
4. Constraints on clear-cutting
5. When there is development, there should be well-defined dense development and open space
6. Save old buildings downtown
7. There should be a mini-town at Calvander
8. Medium rise buildings downtown, but human-scale
9. Architectural integrity
10. Control growth, but allow affordable housing

11. Node community in transition area with new town center and small village feel
12. Carrboro should learn from other places where land is used efficiently
13. There should be reasonable small-scale, commercial development at Calvander
14. Infill needs to be smarter, with more character
15. Grow up, not out
16. Performance-based zoning

Technology

1. The town should be online (town forms, taxes paid online, information, etc)
2. Carrboro should pursue innovative new technologies such as Broad-band access, wireless internet, fiber optics, DSL
3. The town should promote telecommuting and the 'untethered' office
4. The town should install a cell phone jammer
5. Redirect technology to assist town in goals (internet, adapt public works to our needs, clean transportation)
6. "Electronic Community" or "Virtual Community"
7. The town should establish a telecommunity center
8. There is a need for more alternative business structures
9. The town should support more technology infrastructure

Government

1. The town should lobby for more local control
2. Keep local people involved in planning
3. Flexible responses to changing community needs
4. Regional co-operation
5. Be creative in solutions
6. New paradigms for civic participation

Senior citizen needs

1. Health Care center next a senior center
2. Easy access to public transit
3. Senior center with child day-care facility on site
4. Community hospital and hospice

ETC

1. Bury utility lines
2. Artists should have housing and studios in the downtown
3. Accessible medical center for seniors and the disabled with appropriate care & pharmacy
4. Free cable TV for seniors

APPENDIX B:

SCENARIOS OF LIFE IN THE YEAR 2020

Carr Village North – 2020

Chapel Hill Newspaper, “The Daily Weekly”
May 30, 2020

Families from Carr Town South and Carr Town North will join forces this weekend to celebrate the annual Spring Festival of the Towns. On Friday, families can stroll on the Weaver Street Esplanades and enjoy sculpture, art and crafts created by local residents. Food booths with a variety of ethnic foods will be provided by Carrboro restaurants. At sundown, the Carr Town Sympony will play a concert in the park at Harris Teeter Plaza. Movie buffs can enjoy an evening at the outdoor film festival, a week-long annual event which runs concurrently with the Spring Festival. Seating will be available on a first-come, first-served basis. The giant screen, mounted on the side of the old 3-story parking building, can be seen from many adjacent apartments and living quarters over the downtown stores. Some residents rent their rooms for exorbitant prices to guests from abroad who come to Carr Town for the internationally-renowned film festival which attracts entries from the most avant garde independent film producers.

On Saturday, a full schedule of events is scheduled in the central park district of Carr Town North and on the adjacent soccer fields. This includes softball and soccer games for all ages, hikes in the forest buffers that surround Carr Town North, and a fishing contest for children at the community pond. Special senior events are scheduled, including a clogging contest and swing dancing. The traditional tour of the Andrews-Lloyd Farm Museum will also be available. Shuttle buses will run on the hour from Carr Town North to the Andrews-Lloyd Farm with a stop at the cluster of 1890 stores at Calvander. The reconstructed Calvin Andrews country school at Calvander will also be open at no charge.

Buses will leave the train station in Carr Town South every fifteen minutes on Saturday beginning at 9 am. The last returning bus will leave Carr Town North at midnight.

Carr Town North was developed as a neo-traditional village in 2010, six years after the downtown redevelopment of Carr Town South began on a piece-by-piece basis following the plan developed by Giles Blunden and using the guidelines established through citizen participation in the 2020 visioning process. The Northern Transition property was purchased by a progressive consortium of local businessmen, planners, architects, developers, and citizens. After receiving financial backing from a mysterious benefactor, they were able to purchase the entire 250 acres of land in the Northern Transition which they labelled “Carr Town North.” By popular demand the name “Carrboro” was changed to Carr Town South to reflect the complimentary balance between the two centers. Both villages are loved by those who live in them, and Carr Town is still high on the US News and World Report’s list of the best retirement towns in the US.

Vision 2020 – Preamble to the Suggested Policies

A beautiful morning, so I decided to stroll downtown to my office. The canopy of trees over Greensboro Street provided a cool shade as I walked. As always, I'll stop at Weaver Street Market to pick up my morning coffee and one for Jerry, my partner. Jerry lives up north of Calvander and he takes the shuttle bus in every morning. As I approach Weaver Street, I can see a group of seniors going into the Century Center for a day of involved activities, discussions, instructions, and a lot of other fun activities. They also have use of the rooftop gym and solarium during the morning hours. Soon, the working parents will arrive to drop off their kids for day care. Jerry drops off his daughter before coming to our office.

If I look east, I can see the windows of our offices in the five-story building just behind the Armadillo Grill. Some call the building "The Starting Gate" because so many new ventures and businesses start out there. But it is not an incubator for people like Jerry and me. Lots of the offices and most of the stores are occupied by long-term tenants. Because of its success, two more similar buildings are under construction, one on South Carrboro Street, and another at the Highway 54 crossroads, next to the Multiplex Cinema. The Multiplex is ok, but I much prefer the Greenwich Art Theater right next to the Artscenter complex.

The coffees in hand, I head to the office after having greeted several people at the market and on the street before entering the office building. Jerry arrives soon after I do and we get down to a full morning's work. When we can close up and go out for lunch, there are so many terrific choices and so many of them offer outdoor dining. After a really nice lunch we walk about enjoying the traffic-free downtown. Cars are never allowed and delivery trucks are restricted to the hours of 11:00 p.m. and 5:00 a.m. The loop road sure cut out the traffic congestion, and the electric delivery trucks cut down on the pollution. The electric shuttle buses allowed in parts of downtown are a godsend, especially when it rains. We discuss the Town's plans regarding the expansion of the Farmer's Market Commons to include free outdoor dancing programs, sponsored by the Dance Company of Carrboro. We greet the Mayor, who asks if we plan to attend the North Carolina Symphony Concert at Carrboro Fields (adjacent to Carrboro Stadium), we both reply in the affirmative.

Back in the office, there's a message from Gina. She had called to ask if we want to meet her tonight at the newly renovated Town Hall for the Citizen's Art Show opening, we agree on the time. She reminds us that the Photography and Crafts show at the Century Center is closing on Sunday and to make sure to see it. Gina works with us, but she works out of her home. She is also a mass of information regarding all the cultural events happening in little old Carrboro. Lastly, she reminds us that we're all going to a performance of "Peter Pan" at noon on Saturday with our kids. And, that night to the musical "H.G. Wells' Outline of History," with the original Broadway cast. Looks like we'll be spending a lot of Saturday at the ArtsCenter.

Thankfully, we have a lot to occupy our time Downtown between the shows. It's more fun for us and the kids than one of those theme parks, with all their hype and glitz. But I am looking forward to a relaxed Sunday. My family plans to get to the soccer field early and watch my son play. Afterwards to the other parks for a picnic first, then to just relax, meet friends, snack and doze while reading the newspapers. Or, to wander over to the pools area

and watch the people cavorting. Wow, can't wait for the weekend. I turn on the radio, tuning it to WCBO, which will give us the weather report as well as an update on what's happening in our town. Nice to hear that the last stretch of Greenway will be completed next week and we'll be able to walk from Southern Village all the way to the new mini-town about three miles north of Calvander without having to cross a street, only feet and bikes allowed. The east-west greenway should be finished soon, from Carrboro to downtown Durham; Greater Carrboro has become a reality. The afternoon passes quickly. And we prepare to close up shop for the day. I need to pick up a few things at Weaver Street Market for dinner. I must remember to ask about the other new stores that they are opening in the north. Out in the street, the sun is just settling, we wave to a few friends and walk towards the Century Center where he'll pick up his daughter and I'll head to the market. As we part he says "good night Ben" and I reply "good night Jerry."

Scenario for Parks and Recreation

This weekend I am planning to attend a soccer tournament hosted at the local soccer complex built as a public/private partnership. My niece's soccer club from Kentucky will be coming to play. She is so excited because UNC and the Chapel Hill-Carrboro region have an international reputation for women's soccer excellence. The whole team is thrilled to be playing here where Mia Hamm and so many other great women soccer players trained.

In retrospect, joining with Orange County, Hillsborough and Chapel Hill to build the soccer complex has been a win-win situation for all concerned. Partly due to UNC's reputation, the soccer complex is a huge success both in terms of economic benefit to community, local development of talented players and a recreational benefit to the community. Benefits to the community include:

- \$15 million in local revenues from hosting soccer tournaments

- 4,000 local youths annually who participate in soccer programs on local fields

Revenues from the operation of the soccer complex are put into scholarships for youth who need financial assistance to participate. There has been a significant increase in African-American, Latina/Latino, and Asian youth participation since the scholarships became available.

Chapel Hill/Carrboro Transit system provides adequate service for youth to get to the soccer complex for practice and games so that dependence on parents for transportation is no longer a barrier to participation.

Swimming Pool

I am swimming again for exercise and relaxation. I quit swimming because all the public pools in our area were so over-used that swimming was very stressful. Swimming in a lane shared with four other people has many hazards. Kicked in the side, pushed under, drowned in backwash were a few of the hazards. Now with the new pool, it is pleasant again to swim before and after work. The recreation department offers swimming lessons at the pool in the morning and is sponsoring swim teams for youth. Of course the improved Chapel Hill/Carrboro Transit system makes it possible for more youth to participate in the swim team because they do not have to depend on parents for transportation.

Scenario for Carrboro on the Web 2020

I am house sitting for the summer in Carrboro for a family that is living in Africa this summer. I am from the West Coast and this is my first time living in North Carolina. As I sit at the breakfast table, I am planning my weekend.

Waste Collection

The trash collection and waste recycling day is coming up. I don't know what I can recycle at the curb so I go on the Carrboro community website and click on the Recycling button. I find out that the plastic bags cannot be recycled at the curb but that the closest recycling center is located at Carrboro Plaza. The display shows me a map of the drive-to recycling centers. I also look at a map and schedule for curbside recycling. I learn that since Tuesday is July 4th, my recycling and garbage will be picked up on Wednesday instead of Tuesday.

Art in Carrboro

Carrboro has a national reputation for public art and art galleries. Someone told me that there is a photography gallery in Carrboro that has a current exhibit of her brother's, a renowned photographer, work. What is the name of the gallery? I go on Carrboro's website and look at the Gallery listings. I find the name and location of the gallery with a brief description of their exhibit. I discover that the gallery is only open three afternoons and evenings. Today is not one of those days so I will plan to go this weekend, the last weekend for the exhibit.

When I was visiting Carrboro last year I saw an incredible sculpture on Weaver Street. Who was that artist? I look on the ArtonWeaver site linked from the Carrboro site and find a picture of the sculpture in the archive. I learn that it has been sold and moved to a new location. I can go by there and visit the sculpture but I also learn that I can link to the sculptor's studio where I can see more of her work and discover that she has open hours on this Saturday afternoon.

Making dinner

I have a friend coming to visit this weekend and am planning a dinner party for several friends. I am pouring over my cookbooks to decide what I want to make for dinner. I need a special cut of meat so I email Cliff's market and order the meat. I want to make a dessert with local strawberries but maybe the season is over so I click the Farmers' Market site and check to see if anybody expects to have strawberries for sale this Saturday. I would like to make the Mexican squash blossom soup so I email one of the farmers to ask if they will bring me 25 squash blossoms so that I can make the soup. This is a special order since they usually only bring the squash, not the blossoms. We email back and forth until we reach an agreeable price for the blossoms. Also, I want to know when those really good, small blueberries that Mr. ? grows are going to be ready. They sell out early so I will get the market early when they come in.

Other Activities with a Visitor

I am going to be in a meeting all day so it will be difficult for me to use a telephone but I want to make a reservation at Acme so I use my palm device to connect with Acme. I request a reservation at 7:15. After seeing a display of their tables and which ones are open at 7:15 pm I select a nice table by the window and get a confirmation for my reservation at table no. 10 at 7:15.

Perhaps we would like to go by WSM and have a drink while listening to some music so I go on the link to find out who is playing tonight and, this will totally impress my friend, I find out what wines are being served tonight.

My friend wants to move here

My visiting friend is so impressed with Carrboro that she wants to consider moving here. She goes on to Carrboro Connect and looks at neighborhoods and school districts. She has a small business that she would move here so she goes onto the Economic Development section of the site and looks at the map of available commercial space.

Carrboro Downtown in 2020 – a vision

It's a beautiful weekday morning in early summer of 2020 and I'm walking to my office on Weaver Street from the light rail station by Carr Mill. Downtown Carrboro has never looked better and I am thinking of how far we've come in the last two decades. How would I describe the difference that twenty years has made? Here's my view.

First of all, it's so much easier to walk around town. Back in the '00s we already had one of the most walkable downtowns in the state, but there were problems. We've now eased the congestion and made it much easier and safer to walk around and cross the streets. Now parents in the community feel happy to give even their 4th and 5th grade kids the freedom to go to activities and use resources like the library, the community swimming pool and the ArtSchool programs independently and safely. And getting to the downtown has never been easier. I'm fortunate enough to live within a few minutes walk of the light rail service which shuttles from Eubanks Road to the University, and that's how I get to the office most mornings. Other parts of the community are served by a wildly popular system of 16-passenger LP gas-powered jitneys, which though they run on regular routes at regular intervals will stop anywhere to pick up a passenger. Thanks to on-board radios and the dispatcher's computer, they can easily divert a few blocks to pick up or drop off a fare and connect with other service routes. We still have transportation issues to resolve: there's still no passenger rail service from Carrboro or Chapel Hill to Raleigh and RTP (they're still arguing over the choice of route) but the community decided years ago that it's far more effective to bring goods, services and resources to the community than to transport the community to out-of-town goods, services and resources.

In 2020 Carrboro we have more employment opportunities available in town than ever before. We decided long ago that diversity was our strength, so we concentrated on providing space for our homegrown businesses to expand, while maintaining the multitude of small low-rent spaces to nurture the start-up businesses that are so important to us. Business of course is booming. Since the year 2000 we have quadrupled downtown business space. Weaver Street Market Cooperative spawned a host of community-owned enterprises, including the first (and still the most popular) of the town's several downtown hotels, and became a national legend in the process. Governor Kinnaird declared the Cooperative a State Treasure a few years ago, and business and community leaders from across the U.S. come to Carrboro to study how community business ownership can transform a town's economic base. Privately-owned businesses thrive here too. Developers love working in Carrboro because the Town's goals and objectives are so clearly defined and supported by town development control staff and by the ordinances, and this has resulted in some really wonderful projects over the years.

A vision of Carrboro in the future...

My name is Jim Dickert, and I'm a 28 year old single dad, and an engineer with a small firm in downtown Carrboro.

One of the reasons I've been able to keep my family together is the exceptional variety of amenities available to us here.

My mother, who shares in the childcare for my boys, can take the bus from her apartment to our house. Later she can check in on my grandmother who lives in the senior citizens' housing about a half a mile away, in our same village.

We can walk to the market in our village square and to the boys' doctor's office as well. There's a playground and a ball field within a short walk too. And the boys love the trail along the creek – they can show me what they learned in their science class field trips there.

On weekends we bike along the bike boulevard and the trails into downtown to get an early supper and listen to a concert on the commons. One afternoon a week my mother takes an art class while she waits for the boys to finish their music lessons in the ArtsCenter. We all meet for dinner – there's no rush because the buses run all evening.

What's really impressive is that we have all this, but our taxes are no higher than communities that offer far less. That's because businesses like mine are encouraged to settle here and the town staff works with us to see that we have the services we need to take care of our customers. When we're successful, the taxes we pay help to keep everything affordable for a variety of people. Back when taxes kept going up, we worried that my grandmother wouldn't be able to stay here and that I wouldn't be able to find affordable housing either. But now, all three generations can live nearby and families like mine have the support they need.

A day in 2020

I walk down from my fifth story loft home in the heart of town, down the stairs and into the morning sunshine. As I come out through a garden to North Greensboro Street I am struck by the freshness of the air. The narrow driving lanes for the new lightweight cars are very manageable for me as a pedestrian and the place is full of people walking here and there and enjoying themselves and each other. The light at the ground level is filtered shade from all of the pin oaks that were planted at the turn of the millenium. They are now just maturing and have had a dramatic impact on the comfort of the downtown area over the last five years. Carrboro is now a destination for the exchange of creative ideas and has a vibrancy that feels both invigorating and prosperous. As I walk with my neighbor over to the market to have a cup of coffee I am proud of what Carrboro has become and thoroughly enjoy the sense of life and well being that it seems to support.

Carrboro in 2020

As we teeter towards our dotage, my wife Catherine and I don't think we could find a better place to live than Carrboro. From our home on Oak Avenue we can walk up to the community pool on N. Greensboro where we go nearly every morning for our senior synchronized swimming classes. In the afternoon we walk down to the Century Center to do volunteer work at cyber library. In exchange for our volunteer time we get reduced tuition at the Carrboro Communiversity, which holds classes at the center and various other locations around town. We often go back to the center in the evenings for dances or concerts and every third Friday night we go the Cats Cradle for Boomer Night.

Sometimes we will go for weeks at a time without even unplugging the old '09 VW electrobug. Since the light rail was finished in '15, we can be in Raleigh in thirty-five minutes.

Many of our neighbors are young married couples who work at one of the high tech firms out at Calvander Village. Most of them bike to work on the Carrboro to Hillsborough Bike Path.

There aren't as many students in the neighborhood as there were back in the 1900's, but most of the ones that are seem to be in Rock 'n Roll bands hoping to get a recording contract with Paris of the Piedmont music which is headquartered in one of the new three story buildings on Weaver Street.

Fete de la Musique has gotten so well known that this year we are leaving town and renting our house to talent scouts from Los Angeles for an undisclosed amount of money.

Transportation 2020

It's morning. Turning to my window this late April 2020 morning – my 75th birthday – I am delighted to see the sun shining through the newly-greened leaves. After all those days of rain, the sun will give a boost to our PLAN. Will everyone come? Will anyone arrive driving? What will be their excuse if they do?

Municipal, county and regional transportation was combined 3 years ago, but it was only last month that the true gift was added; during non-peak hours, citizens may flag down buses as they pass – no more gauging our lessening strength with care and keeping up with the stops and the time. Then was better, of course, than taking the same old 2 or 3 mile walks all the time, but now is freedom for we gray-haired walkers.

The Birthday Plan? Friends will walk and bus from every direction to that new bed and breakfast out past Calvander Village that is said to serve a magnificent lunch. Out Hillsborough, across Eubanks from Timberlyne, down Franklin from the east and in Dairyland from the west. Some will brag on our efforts and some will not over lunch, but we'll all board the 2:22 bus as we start our various journeys home.

And one final look into the future.

It's another busy Saturday, and I just missed the train to UNC to visit my kids. I was distracted by the downtown markets, as I usually am. They seem to have gotten bigger over the years. It all started when they closed Weaver Street on Saturdays. A few years later they closed the street permanently, and now, since they removed the parking lot, there is almost too much to see in one morning.

It has been great for the center of town since they started building those new parking decks. Although, the trains are so easy now that people have been using the decks less. I believe I heard the Town is talking about renovating one of those parking decks into new office space.

Well, at least I won't be late for lunch, there is another train in ten minutes. That should be just enough time for me to check what's playing at the Greensboro Street movies tonight and have another quick look at the market!

APPENDIX C:

AMENDMENTS

February 24, 2004
Section 6.18

February 2, 2010
Town of Carrboro Retreat

LOOKING AT VISION 2020



1.0 PROGRAMMING, SERVICES, AND AMENITIES

Vision Statement

Many of Carrboro's existing programs and services were examined by the Vision2020 Steering Committee. Recreation and parks, arts and culture, human services, and such critical town services as police, fire, and public works contribute greatly to the quality of life in Carrboro. As such, these programs and services deserve the town's ongoing support.

1.1

Recreation and Parks

Vision	2010 Status
<p>1.11 Encourage and support the development of greenways and parklands dedicated to public use along streams and easements.</p>	<p>9-1-06 Rec & Parks Master Plan Update http://www.townofcarrboro.org//AdvBoards/greenways/PDF/RecParkCompMstPlan.pdf t</p> <p>Nov. 2009 Morgan & Bolin Creek Draft Greenway Alignments http://www.townofcarrboro.org//AdvBoards/greenways/PDF/DraftAlignment_09032009.pdf Bolin http://www.townofcarrboro.org//AdvBoards/greenways/PDF/RecommendedAlignment.pdf Morgan</p>
<p>1.12 Parks or Playfields should be located within walking distance of every residence in Carrboro</p>	<p>9-1-06 Rec & Parks Master Plan Update http://townofcarrboro.org/rp/PDFs/APPROVEDMASTERPLAN.pdf</p> <p>Sec 15-98(d) http://townofcarrboro.org/pzi/PDFs/LUO/Art-xiii.pdf</p>
<p>1.13 Fund and Implement the Master Parks and Recreation Plan; seek to collaborate with Orange Co and School Board for joint provision, purchase and operation</p>	<p>Carrboro CIP http://towtownofcarrboro.org/BoA/Agendas/2009/11_10_2009_B2A.pdf http://townofcarrboro.org/MS/PDFs/CIP09-15.pdf 09-15 http://10-16</p>
<p>1.14 Expand recreation programming for youth adults and seniors with a strong desire for a pool, outdoor theatre, soccer field, dance space and a gym; music in parks, lots of activity in Century Center and a kid's park.</p>	<p>9-10 Budget p. 121 http://townofcarrboro.org/MS/Budget/Adopted/0910/Complete.pdf</p> <p>Rec & Parks Active Life 50+: http://townofcarrboro.org/rp/gpefoaWSio.htm</p>
<p>1.15 Encourage ecologically sound and sustainable maintenance of open space, including parks and greenways.</p>	<p>CIP page 2.5 http://townofcarrboro.org/MS/PDFs/CIP09-15.pdf</p>

1.2 Arts and Culture

Vision	2010 Status
1.21 Support regular music events and festivals in parks and Century Center.	Rec & Parks Web Page Special events http://townofcarrboro.org/rp/gpseWSio.htm
1.22 Support a centrally and conveniently located library	Carrboro Branch http://www.co.orange.nc.us/library/carrboro.asp#gallery Support of Book sale http://townofcarrboro.org/BoA/Minutes/2009/11_17_2009.pdf Cybrary & Annual Budget p. 193 http://carrboro.com/cybrary/ http://townofcarrboro.org/MS/Budget/Adopted/0910/Complete.pdf
1.23 The Carrboro Century Center should be developed to its fullest potential complementing the Arts Center drawing people downtown, creating a sense of place, serving all people.	Century Center web page http://townofcarrboro.org/rp/cc.htm
1.24 Support efforts to honor and celebrate diversity through activities at the Century Center and by supporting cultural centers, festivals, music and art events.	Special Rec Programs: http://townofcarrboro.org/rp/gpsrWSio.htm
1.25 Continue to support and encourage its citizens to support the Arts Center	Annual Budget p. 193 http://townofcarrboro.org/MS/Budget/Adopted/0910/Complete.pdf

1.2 Arts and Culture

Vision	2010 Status
1.26 Preserve and celebrate its history through installations and display and continue to support Carrboro Day.	Rec and Parks Web Page: http://townofcarrboro.org/rp/gpseWSio.htm#1
1.27 Support, fund and purchase public art including sculpture and murals and encourage art projects like The Public Gallery of Carrboro's Art on Weaver St.	Community & Arts support: http://townofcarrboro.org/BoA/Minutes/2009/03_03_2009.pdf 3-3-09
1.28 Encourage year-round use of the Farmer's Market and also additional compatible uses such as a regular crafts and arts market.	Farmers Market Web Page http://www.carrborofarmersmarket.com/
1.29 Develop a celebration in which art galleries, the Town and local restaurants sponsor arts-related activities on a regular basis.	Walk Carrboro 6-2-09 item http://townofcarrboro.org/BoA/Agendas/2009/06_02_2009_D4.pdf Lunchbox concert series with local sponsors http://townofcarrboro.org/rp/gpseWSio.htm#13 Town Hall Art Exhibits + Community & Economic Development Art Gallery Directory http://townofcarrboro.org/ecd/artgalleries.htm

1.3 Human Services

Vision	2010 Status
1.31 Define unmet human needs and urge Orange County to address them.	<p>Orange County Partnership to End Homelessness</p> <p>http://townofcarrboro.org/BoA/Agendas/2009/06_09_2009_2.pdf</p>
1.32 Carrboro should continue to support human service needs that are above and beyond those met by the County.	<p>Coordinated Human Service Advisory Commission annual budget process</p> <p>http://townofcarrboro.org/BoA/Agendas/2009/06_09_2009_1.pdf http://townofcarrboro.org/BoA/Agendas/2009/06_09_2009_1A.pdf</p>
1.33 Develop a comprehensive plan supporting needs identified by special populations, including senior citizens and immigrants, focusing particularly on transit needs, access to health care and integration into the greater community.	<p>Orange County Human Service Guide:</p> <p>http://townofcarrboro.org/ecd/PDFs/OrangeBook.pdf</p>
1.34 Follow through on maintaining a senior center in Carrboro.	<p>Orange Co Senior Centers</p> <p>http://www.co.orange.nc.us/aging/SeniorCenters.asp</p>
1.35 Consider the impact of town ordinances and policies on the well being of its most vulnerable citizens (elderly, children, disabled, and those with a low, middle or fixed income.	<p>L UO amendment to allow 5.110, elementary and secondary schools, as a permissible use in the B-4 zoning district.</p> <p>http://townofcarrboro.org/BoA/Agendas/2009/11_24_2009_B2A.pdf</p>

1.4 Town Services

Vision	2010 Status
<p>1.41 Encourage paperless transactions; town services including information, town forms, ordinances and payments should be made available on-line.</p>	<p>Rec & Parks on line registration & payment : http://online.activecommunities.com/carrboro/Start/Start.asp?SCheck=956511215&SDT=40198.4344461458 Forms by dept i.e. Planning and Management Services: http://townofcarrboro.org/pzi/forms.htm Planning http://townofcarrboro.org/ms/privlic.htm Management Services</p>
<p>1.42 Staff should remain dedicated to fast, efficient public service by employing new technologies and skills that increase cost-effective and environmentally friendly services.</p>	<p>Online services such as Egov, List Serve, email directory and GIS: http://townofcarrboro.org/srvcs.htm</p>
<p>1.43 Continue to provide a high level of police, public works and fire service to its citizens.</p>	<p>Police http://townofcarrboro.org/pd/default.htm Public Works http://townofcarrboro.org/pw/default.htm Fire http://www.carrborofire.org/default.htm</p>
<p>1.44 Continue to seek opportunities to exercise more local control of revenue options and community health and welfare options.</p>	<p>Carrboro Human Service Commission's yearly funding recommendation http://townofcarrboro.org/BoA/Agendas/2009/06_09_2009_1A.pdf OC Coordinated Human Service Advisory Commission's annual budget process http://townofcarrboro.org/ecd/PDFs/OrangeBook.pdf</p>
<p>1.45 Continue to encourage the active participation of citizens in community planning.</p>	<p>Advisory Boards http://townofcarrboro.org/AdvBoards/advbrds.htm</p>
<p>1.46 Continue community building efforts by encouraging the use of facilitation and conflict resolution, and seek alternatives or supplements to the public hearing format when controversial issues are before the Board.</p>	<p>Facilitation of the NSA Implementation Review Committee (NSAPIRC) process 3-20-07 http://townofcarrboro.org/BoA/Agendas/2007/03_20_2007_C7.pdf Morgan & Bolin creek Greenways Public Participation & Facilitation http://townofcarrboro.org/PZI/Trans/CoulterJewellThames091008.pdf#xml=htt</p>

1.5 Adult Education

Vision	2010 Status
1.51 Bring a community college to the area.	Durham Tech, Orange Co. Campus http://www.durhamtech.edu/html/aboutdt/AboutDT.htm
1.52 Create a "Communiversi" providing learning opportunities at all stages of life i.e. an Elderhostel for adult and retiree students.	UNC - Sonja Haynes Stone Center http://sonjahaynesstonectr.unc.edu/programs/forms/communiversi ty
1.53 Promote the Century Center's adult education offerings and use this facility to its fullest potential as a venue for educational opportunity.	Active Life Programs http://townofcarrboro.org/rp/gpefoaWSio.htm

2.0 Development

Vision Statement

Carrboro's development should take place in a manner consistent with a set of adopted values. The health and safety of citizens should be protected. Respect for and protection of the natural environment should be integrated into the town's policies as a high priority in enriching the quality of life. As much as possible, Carrboro's town character should be preserved; and the town should respond to citizen initiatives toward that goal. The community should continue to foster diversity, welcoming people of all races, ages, ethnicity, sexual orientations, and social and economic backgrounds. Growth should occur in a balanced fashion, and at a rate that does not jeopardize the values set forth by Vision2020. The interests of all members of the community, including property owners, neighbors, and other interested citizens should be considered when making development decisions.

2.1 Avoid Adverse Impacts on Health and Safety

Vision	2010 Status
<p>2.11 Infill development should take place in a manner that enhances neighboring areas, mitigates adverse drainage, transportation, aesthetic and environmental impacts.</p>	<p>Infill restrictions-Pine Street 2001 http://townofcarrboro.org/BoA/Agendas/2001/12_11_2001_E2.pdf http://townofcarrboro.org/BoA/Agendas/2002/05_21_2002_D1A.pdf</p>
<p>2.12 Limit development in sensitive areas such as the university lake watershed, wetlands and other areas which could adversely affect water supplies and habitat.</p>	<p>Natural Constraints GIS Map http://gis01.ci.carrboro.nc.us/CarrboroNew/ Revised Water Quality Buffer Ordinance Provisions http://www.townofcarrboro.org/BoA/Agendas/2009/03_24_2009_A2.pdf agenda item http://www.townofcarrboro.org/BoA/Agendas/2009/03_24_2009_A2A.pdf draft ordinance</p>

2.2 Preservation of the Natural Environment

Vision	2010 Status
<p>2.21 Require preservation and maintenance of open space, enforce restraints on clear cutting and to require adequate buffers.</p>	<p>LUO Sec 316 & 318 retention of trees http://townofcarrboro.org/pzi/PDFs/LUO/ART-XIX.pdf LUO 15-199 to 201 Maintenance of open space http://townofcarrboro.org/pzi/PDFs/LUO/Art-xiii.pdf EAB brochure on preservation and maintenance of open space 6-18-02 http://www.townofcarrboro.org/BoA/Agendas/2002/06_18_2002_E2_A.pdf Agenda item http://www.townofcarrboro.org/BoA/Agendas/2002/06_18_2002_E2.pdf</p>
<p>2.22 Where acceptable development should be dense and well defined with areas of well preserved open space.</p>	<p>NSAPIRC recommendation (page 2 Environment and Greenways) http://www.townofcarrboro.org/BoA/Agendas/2008/03_04_2008_C2.pdf</p>
<p>2.23 Encourage the planting of species that are not invasive, the removal of invasive species, and increase public awareness of acceptable plantings (Appendix E-17 of the LUO)</p>	<p>Appendix E17- invasive plant species http://www.townofcarrboro.org/pzi/PDFs/LUO/APPEND-E.pdf</p>

2.3 Attractiveness of Development

Vision	2010 Status
<p>2.31 Encourage developers to apply the Downtown Design Guidelines in the CBD and follow Architectural Guidelines in residential areas.</p>	<p>LUO 15-177 Vernacular and 15-178 Downtown Architectural Standards http://townofcarrboro.org/pzi/PDFs/LUO/ART-XI.pdf</p>
<p>2.32 New development that blends single family and multi-family units should be designed and landscaped to ensure compatibility.</p>	<p>LUO 15-177 Architectural Standards for Subdivisions Containing 4+ single family detached units. http://townofcarrboro.org/pzi/PDFs/LUO/ART-XI.pdf Examples: Winmore http://gis01.ci.carrboro.nc.us/Website/Zone/images/SitePlans/Winmore_2.jpg Claremont http://gis01.ci.carrboro.nc.us/Website/Zone/images/SitePlans/spclaremont2.jpg</p>

2.4 Carrboro's Character

Vision	2010 Status
<p>2.41 The downtown should have medium-rise buildings appropriately sited with adequate public access, with the Century Center as a focal point where people work, gather, shop for every day needs, socialize and recreate</p>	<p>New vision for Downtown Carrboro p8-10 http://townofcarrboro.org/pzi/PDFs/ToCFinalVision.pdf Downtown Design Guidelines http://townofcarrboro.org/pzi/PDFs/DowntownDesignGuidelines.pdf</p>
<p>2.42 Development should support the Town's distinctive character by adhering to town policies that limit road width, encourages roadside plantings, preserves historic values and retains unspoiled green spaces and other natural areas.</p>	<p>LUO 15-216 streets and sidewalks http://townofcarrboro.org/pzi/PDFs/LUO/Art-xiv.pdf LUO 15-315 required trees along dedicated streets http://townofcarrboro.org/pzi/PDFs/LUO/ART-XIX.pdf LUO 15-198 Open Space Requirement http://townofcarrboro.org/pzi/PDFs/LUO/Art-xiii.pdf</p>
<p>2.43 Carrboro should plan and encourage the growth of tree canopies over roads to mitigate the heat and smog effect caused by superheated pavement. Carrboro should strongly encourage the electric utilities to put their lines underground to allow for full canopy coverage.</p>	<p>LUO 15-246 Underground utilities http://townofcarrboro.org/pzi/PDFs/LUO/ART-XV.pdf</p>

2.5 Balanced and Controlled Growth

Vision	2010 Status
2.51 Support the implementation of the Small Area Plan.	NSAPIRC recommendations 4-8-o8 http://townofcarrboro.org/BoA/Agendas/2008/04_o8_2008_1.pdf Minutes http://townofcarrboro.org/BoA/Minutes/2008/04_o8_2008.pdf
2.52 Continue to require the construction of a diverse housing stock.	Affordable Housing http://townofcarrboro.org/BoA/Agendas/2007/06_26_2007_C4.pdf At tachment http://townofcarrboro.org/BoA/Agendas/2007/06_26_2007_C4A.pdf Active Projects Report attachment B http://townofcarrboro.org/pzi/PDFs/ActiveProjectReport.pdf
2.53 Careful attention should be paid to the carrying capacity of the existing infrastructure as growth occurs.	LUO section 15-88 <u>Adequacy of Public School Facilities.</u> http://townofcarrboro.org/pzi/PDFs/LUO/Art-iv.pdf Owasa http://www.owasa.org/Documents/DocView.aspx?IDX=1428 Mobility report card http://townofcarrboro.org/pzi/PDFs/04u22-CarrboroMobilityReportCard2003.pdf

3.0 ECONOMIC DEVELOPMENT

Vision Statement

With the population of Carrboro expected to increase during the Vision2020 period, additional commercial development should be anticipated both downtown and in peripheral areas. Carrboro should seek to reduce the tax burden on single-family owners by increasing the percentage of commercial space in town.

3.1 Nature of Development

Vision		2010 Status
3.1 New Commercial development must minimize negative environmental impacts, emphasize appropriate buffers and not compromise the integrity of established neighborhoods.		LUO 15-161 good Neighbor Standards http://townofcarrboro.org/pzi/PDFs/LUO/ART-XI.pdf

3.2 Downtown Vitality

Vision	2010 Status
<p>3.21 The town should develop a plan to govern the continuing development of downtown. Toward this end, the town should adopt the following goals:</p> <p>Double commercial square footage, build up not out, increase density of commercial property, improve infrastructure (parking, sidewalks lighting & shading) develop transit and traffic initiatives.</p>	<p>Downtown Carrboro New Vision http://townofcarrboro.org/pzi/PDFs/ToCFinalVision.pdf 6-2005 Downtown Traffic Circulation Study http://townofcarrboro.org/pzi/PDFs/CarrboroDowntownTransportationStudy.pdf 3-21-06 Report on Alternative Downtown Development Solutions http://townofcarrboro.org/BoA/Agendas/2006/03_21_2006_D2.pdf 3-2008 Carrboro Parking Study http://townofcarrboro.org/pzi/PDFs/Parking_Report_Carrboro_Spring_08.pdf</p>
<p>3.22 Encourage the development and placement of architecturally significant commercial and civic buildings.</p>	<p>Examples: 300 E. Main http://gis01.ci.carrboro.nc.us/Website/CurrentDevelopment/curdev.asp?devID=124 The Butler http://gis01.ci.carrboro.nc.us/Website/CurrentDevelopment/curdev.asp?devID=123</p>
<p>3.23 Downtown commercial activity could include restaurants, entertainment venues, technology companies, lodging and offices.</p>	<p>Uses encouraged in downtown by LUO in B-1C; B-1G and EAT district: http://gis01.ci.carrboro.nc.us/Website/ZoningQuery/pickzone.asp</p>
<p>3.24 Provide multimodal access to the downtown and as traffic increases consider perimeter parking lots with shuttles to bring people downtown.</p>	<p>Bikeway/Ped and Parking CIP projects http://townofcarrboro.org/BoA/Agendas/2009/11_10_2009_B2A.pdf expanded free bus service and park-ride lots (CW & F routes). http://www.townofchapelhill.org/Modules/ShowDocument.aspx?documentid=2598</p>

3.2 Downtown Vitality

Vision	The Downtown Visioning Charrette
3.25 Encourage walkability, improve pedestrian safety/comfort, improve lighting, shading and create auto barriers.	2005 draft Plan of Action on downtown circulation study http://townofcarrboro.org/BoA/Agendas/2005/10_11_2005_2A.pdf
3.26 Continue using the revolving loan fund to support locally owned and operated businesses and encourage micro-enterprises through education and loans.	Econ development revolving loan fund web page http://townofcarrboro.org/ecd/CRLE.htm Loan summary 2-17-09 p.8 http://townofcarrboro.org/BoA/Agendas/2009/02_17_2009_E2A.pdf
3.27 Consider "pedestrian-only" spaces downtown.	300 E. Main Pedestrian Plaza http://townofcarrboro.org/TownWide/Search/search.html Downtown Livability Area LUO section 15-204 to 206 http://townofcarrboro.org/pzi/PDFs/LUO/Art-xiii.pdf
3.28 Encourage a variety of appropriate residential developments (single-family, multi-family SRO's etc) in the downtown especially as a part of mixed-use development.	8-26-08 The Butler 10 studio, 10 1-bed, 30 2-bed & 7 3-bed http://townofcarrboro.org/BoA/Agendas/2008/06_24_2008_B4A.pdf

3.3 New Commercial Growth

Vision	2010 Status
3.31 Shopping Centers	
3.311 Maximize the potential of existing shopping centers with additional stories where practical before creating new shopping centers.	Northern Small Area Plan page 4 Mixed –Use Village centers http://townofcarrboro.org/pzi/PDFs/sap.pdf
3.312 All Shopping Centers should be connected to residential areas with increased pedestrian access.	Request for Pedestrian access 3-2003 http://townofcarrboro.org/BoA/Agendas/2003/03_25_2003_E3.pdf

3.4 Technology

Vision	2010 Status
3.41 Research ways to support telecommuting	Downtown Market analysis by UNC office of Econ Development p 42 http://townofcarrboro.org/BoA/Agendas/2002/03_21_2002_A_B2.pdf
3.42 Continue to explore new technologies, actively recruit private companies that will supply and distribute the most up-to-date technology throughout town.	Downtown Market Analysis by UNC High Tech p. 60-62 http://townofcarrboro.org/BoA/Agendas/2002/03_21_2002_A_B2.pdf
3.43 Help local businesses grow and expand by taking full advantage of the internet and other new technologies that become available.	Downtown Market Analysis by UNC High Tech p. 27 (downtown internet) http://townofcarrboro.org/BoA/Agendas/2002/03_21_2002_A_B2.pdf

3.5 Home Businesses

Vision	2010 Status
3.5 Encourage small, low-impact home businesses, revise ordinances to remove any unnecessary obstacles, encourage developers to accommodate home businesses in all new developments	Report on Home Occupations p. 1-5 http://townofcarrboro.org/BoA/Agendas/2007/06_12_2007_2.pdf Use 1.9 Home Occupations table of permissible uses: http://gis01.ci.carrboro.nc.us/Website/ZoningQuery/usepage.asp?Piclkuse=1.9&submit1=Get+land+use+information

3.6 Economic Diversity

Vision	2010 Status
<p>3.61 Encourage the widest possible diversity of locally operated businesses with a balanced portrait of convenience (movie, overnight accommodations, home businesses, technology, retail, variety/dept store, restaurants and entertainment.</p>	<p>Econ development revolving loan fund web page http://townofcarrboro.org/ecd/CRLF.htm Loan summary 2-17-09 p.8 http://townofcarrboro.org/BoA/Agendas/2009/02_17_2009_E2A.pdf</p>
<p>3.62 Continue the tradition of being a town that is rich in economic diversity by adopting policies/ordinances that recognize diverse employment types and pay scales.</p>	<p>LUO amendment allowing limited office use in the B-3 Neighborhood Business District http://www.townofcarrboro.org/BoA/Agendas/2006/03_28_2006_3.pdf Town ownership of the Carr Ct. Head Start building for use by the Community School for People Six http://www.townofcarrboro.org/BoA/Agendas/2009/06_02_2009_C3.pdf</p>
<p>3.63 Encourage the development of underutilized property in the downtown area.</p>	<p>See active Projects Report for descriptions of Alberta, Butler, 400 Roberson Sq, 300 E. Main Street projects etc. http://www.townofcarrboro.org/pzi/PDFs/ActiveProjectReport.pdf</p>

4.0 TRANSPORTATION

Vision Statement

The safe and adequate flow of bus, auto, bicycle and pedestrian traffic within and around Carrboro is essential. The public transit system serves to encourage non-auto travel and reduce congestion on existing roads. The town's Land Use Ordinance and economic development policies both address traffic flow in this expanding municipality.

4.1 Transportation Planning

Vision	2010 Status
4.11 Adopt a comprehensive transportation plan that addresses projected population growth projected in Carrboro's planning jurisdiction and adjoining jurisdictions.	Comprehensive Transportation Plan in process by and with DCHC-MPO http://www.dchcmpo.org/index.php?option=com_content&task=view&id=70&Itemid=35
4.12 Continue to implement the town's connector roads policy.	Policy revised in 2003 to remove Tripp Farm Rd and Pathway Drive connections and in 2005 added Brewer Lane Approved Tripp Farm Road in MLK Park, Winmore and Claremont Rock Haven Road at Carrboro High School, Morgan Creek bridge at Rose's Walk, Lake Hogan Farms Road at Legends, & Ballentine. http://townofcarrboro.org/pzi/PDFs/ConRoadsPol.pdf
4.13 Cooperate with Chapel Hill and regional entities to comprehensively plan for regional transit service through the TTA for seamless transit connections with shorter and more frequent service.	Special Transit Advisory Committee, Long range transit plan (funded with STP-DA; town match of \$45,308) http://www.transitblueprint.org/stac.shtml 2-13-07 TTA report http://www.townofcarrboro.org/BoA/Agendas/2007/02_13_2007_1A.pdf Triangle Transit Short Range Transit Plan http://www.triangletransit.org/uploads/bus_pdfs/SRTP_exec_summary.pdf

4.1 Transportation Planning

Vision	2010 Status
<p>4.14 Support a passenger rail connection through Carrboro between Carolina North and UNC's Main Campus.</p>	<p>Carolina North 12-4-09 draft Traffic Impact Analysis http://research.unc.edu/cn/ExecSummary_Update120409.pdf Campus to Campus Connector http://research.unc.edu/cn/C2CMap_4.pdf</p>
<p>4.15 As public transit routes are identified, the Town should locate new high density development along them through changes to the zoning ordinance and map.</p>	<p>NTA Design Workshops to explore land use and transportation oriented development corridors. http://www.townofcarrboro.org/BoA/Agendas/2009/10_06_2009_D4.pdf 10-6-09 Transit Partners proposed gateway corridors http://townofcarrboro.org/BoA/Agendas/2009/10_06_2009_D3.pdf 1-19-10 Long Range Transit Plan PH http://www.townofcarrboro.org/BoA/Agendas/2010/01_19_2010_D3.pdf CH Carrboro Long Range Transit Plan Summary http://www.ci.chapel-hill.nc.us/Modules/ShowDocument.aspx?documentid=3966</p>

4.2 Public Transit

Vision	2010 Status
4.21 Support additional Park & Ride Lots and facilitate access to youth activities, special events, educational and employment opportunities(particularly at UNC).	Approval of Jones Ferry Park & Ride http://www.townofcarrboro.org/BoA/Agendas/2001/10_23_2001_D3.pdf Approval of SECU Park & Ride http://www.townofcarrboro.org/BoA/Agendas/2005/01_11_2005_D4.pdf
4.22 Expand Town's participation in the organization and planning for the bus system with equitable cost sharing subsidized by federal & state grants a well as local appropriations.	6-26-07 Partners Study Committee & Transit Master Plan proposal http://www.townofcarrboro.org/BoA/Agendas/2006/06_27_2006_C1.pdf
4.23 Support Transportation services that meet the special needs of disabled citizens.	CH Transit EZ Rider Service http://www.townofchapelhill.org/index.aspx?page=751

4.3 Bicycle and Pedestrian Traffic

Vision	2010 Status
4.31 Fully implement the bicycle and pedestrian network plan and identify links needed now and until 2020.	Carrboro CIP p 2.3-2.4 http://www.townofcarrboro.org/BoA/Agendas/2009/11_10_2009_B2A.pdf
4.32 Establish connections with pedestrian and bicycle ways in other jurisdictions.	Comprehensive Bicycle Master Plan http://www.townofcarrboro.org/BoA/Agendas/2009/03_24_2009_A1.pdf
4.33 Maintenance of Bike and Ped paths/ways should remain a high priority.	Public Works Street Maintenance (see town budget p114) http://www.townofcarrboro.org/MS/Budget/Adopted/0910/Complete.pdf

4.4 Established Roads

Vision	2010 Status
4.41 As a general policy, established roads should be widened to accommodate bike lanes and sidewalks, but not to provide additional lanes for automobiles.	See chronology of discussions related to Smith Level Road. http://www.townofcarrboro.org/BoA/Agendas/2009/04_21_2009_E1A.pdf

4.5 Transportation/New Development

Vision	2010 Status
4.51 Continue to require developers to install sidewalks and bikeways in new developments.	Developments since 2000, including Winmore, Ballentine, Claremont, Legends, Carrboro High School, Morris Grove http://www.townofcarrboro.org/pzi/PDFs/ActiveProjectReport.pdf
4.52 The cost for upgrading connector or arterial facilities, including bike and ped facilities, should be borne by new developments that front them	Developments since 2000, including Winmore, Ballentine, Claremont, Legends, Carrboro High School, Morris Grove http://www.townofcarrboro.org/pzi/PDFs/ActiveProjectReport.pdf

4.6 Transportation Funding

Vision	2010 Status
4.61 The comprehensive transportation plan should propose and recommend alternative funding mechanisms to finance infrastructure improvements.	MTIP (see recent ARRA changes for example) http://www.dchcmo.org/index.php?option=com_docman&task=doc_download&gid=523&Itemid=34&mode=view

5.0 ENVIRONMENTAL PROTECTION AND PROMOTION

Vision Statement

The town should serve as a leader in protecting the environment and protecting its residents.

5.1 Solid Waste

Vision	2010 Status
5.11 Aim to recycle all solid waste as a "No Waste" community, devise strategies to minimize landfill waste, encourage source reduction i.e. mandatory or "pay as you throw" recycling.	<p>Orange County Recycling Program http://www.co.orange.nc.us/recycling/</p> <p>Solid Waste Plan Update 2006 (5-19-08) http://www.townofcarrboro.org/BoA/Agendas/2008/05_20_2008_D3A.pdf</p>
5.12 Encourage a network of neighborhood composting facilities, explore creating a town compost heap that could benefit the town's gardeners.	<p>Orange Co Solid Waste web site and Public Works Leaf Mulch Pile http://www.co.orange.nc.us/recycling/compost.asp http://www.townofcarrboro.org/pw/PDFs/LeafCollection2009.pdf</p>
5.13 Recycling facilities should be readily available throughout town.	<p>Carrboro Plaza & other County Recycling Centers http://www.co.orange.nc.us/recycling/dropoffs.asp</p>
5.14 Investigate ways to increase the life span of the current landfill.	<p>Orange Co Solid Waste web site "education" http://www.co.orange.nc.us/recycling/edu.asp</p>
5.15 Work with the County to educate all citizens about waste reduction and pursue creative non-traditional programs such as turning garbage into art.	<p>Orange Co Solid Waste web site "education" http://www.co.orange.nc.us/recycling/edu.asp</p>

5.2 Water

Vision	2010 Status
<p>5.21 Work with OWASA to develop policies and infrastructure necessary for water conservation such as re-use of grey water, replace fixtures with low flow models and collecting stormwater for water gardens.</p>	<p>See water conservation ordinances adopted in 2004 and 2009. (5-31-09) http://www.townofcarrboro.org/BoA/Agendas/2009/06_02_2009_C6A.pdf</p>
<p>5.22 Adopt a strategy and set policies to protect all of our creeks, streams, ponds and lakes.</p>	<p>FEMA Flood Hazard LUO Amendments http://www.townofcarrboro.org/BoA/Agendas/2007/01_16_2007_C5A.pdf 11-25-08 draft stormwater and water quality ordinance amendments http://www.townofcarrboro.org/BoA/Agendas/2008/11_25_2008_2.pdf</p>
<p>5.23 Proactively manage stormwater and promote active maintenance of facilities, minimizing impacts of additional impervious surfaces and impacts on waterways.</p>	<p>Creation of Bolin Creek Watershed Protection Team, CWMTF and Section 319 grants http://www.townofcarrboro.org/pzi/Env/Water/bcwr.htm Report on managing nitrogen and phosphorus inputs to Jordan Lake 11/15/09 http://www.townofcarrboro.org/BoA/Agendas/2008/11_25_2008_2A.pdf</p>

5.3 Open Space, Greenways & Natural Areas

Vision	2010 Status
5.31 Work to preserve open space and greenways through all available means i.e. direct purchase, conservation easements, donations, federal and state grants.	See purchase of Adams Tract, http://www.townofcarrboro.org/BoA/Agendas/2004/05_25_2004_B2.pdf acceptance of offers of dedication at http://www.townofcarrboro.org/BoA/Minutes/2001/04_24_2001.pdf and consideration of acceptance of public open space at http://www.townofcarrboro.org/BoA/Agendas/2006/09_19_2006_E2.pdf
5.32 Map a connected series of greenways large enough to serve as wildlife corridors.	See Conservation Map for Upper Bolin Creek at http://www.townofcarrboro.org/GIS/downloads/printmap/Conservation.pdf and open space in approved developments (e.g. Winmore, Claremont, Ballentine, Legends) along Bolin Creek.

5.4 Construction

Vision	2010 Status
5.41 Encourage the reduction of construction/demolition waste through recycling and the employment of "green building" techniques.	<p>See adoption of construction/demolition waste ordinance at http://www.townofcarrboro.org/BoA/Agendas/2002/09_24_2002_D1.pdf and report on Zero Waste resolution at http://www.townofcarrboro.org/BoA/Agendas/2002/09_24_2002_E3.pdf</p>

5.5 Energy

Vision	2010 Status
5.51 Promote every available means of energy conservation, alternative and renewable energy targets include passive and active solar, and composted waste cogeneration.	10-20-09 Update on Energy Planning/Sustainability Efforts http://www.townofcarrboro.org/BoA/Agendas/2009/10_20_2009_D2.pdf
5.52 Set a goal of reduced energy costs in all town buildings and increased fleet mileage for all town vehicles.	Vehicle replacement guidelines and approval of Fire Station #2 with LEED features. CIP message from the Manager http://townofcarrboro.org/BoA/Agendas/2009/11_10_2009_B2A.pdf

5.6 Farmland Preservation

Vision	2010 Status
<p>5.6 Adopt incentives designed to preserve small farms, farm co-ops, organic farming within new conservation subdivisions and elsewhere to help limit the conversion of farmland to developed uses that bridge the transition areas.</p>	<p>Community Gardens accommodated at MLK Park, James St (Duke Power), Carrboro Elementary & may be counted as open space Section 15-198(b) 3-c. http://townofcarrboro.org/pzi/PDFs/LUO/Art-xiii.pdf</p> <p>Farming without livestock Use 14.110 is allowed in all residential zones except for the R-2 high density residential district adjacent to the downtown. http://gis01.ci.carrboro.nc.us/Website/ZoningQuery/usepage.asp?Picuse=14.11&submit=Get+land+use+information</p> <p>Farming with livestock Use 14.120 is primarily allowed in the low density rural residential (RR) and watershed residential (WR) districts. See use table http://gis01.ci.carrboro.nc.us/Website/ZoningQuery/usepage.asp?Picuse=14.12&submit=Get+land+use+information</p>

5.7 Toxic Use

Vision	2010 Status
5.7 Reduce the use of hazardous and toxic products in town operations and expand, promote, and provide public education on efforts such as the least toxic integrated pest management policy.	See the Public Works/ Town website for information on the IPM (Least Toxic Integrated Pest Management Policy) at http://www.townofcarrboro.org/pw/ipm.htm

6.0 HOUSING

Vision Statement

The town should develop a comprehensive housing policy that seeks to provide housing for all of Carrboro's citizens.

6.1 Housing for a Diverse Population

Vision	2010 Status
<p>6.11 Address the issues of density, funding and rezoning to allow for more non-detached housing, mixed use development and communal living to support the accommodation of a variety of housing styles, sizes and pricing.</p>	<p>See reports on housing diversity at http://www.townofcarrboro.org/BoA/Agendas/2003/12_09_2003_E2.pdf</p>
<p>6.12 The variety of strategies should include alternative public and private funding for construction and renovation of low and moderate income housing and a low interest loan pool for individuals and nonprofits</p>	<p>LUO 15-182.4 establishing payment in lieu and use of affordable housing revenue funds http://townofcarrboro.org/pzi/PDFs/LUO/Art-xii.pdf; see also annual adoption of HOME plan. http://townofcarrboro.org/BoA/Agendas/2009/05_05_2009_D1.pdf See also 9/29/05 Assembly of Governments agenda/minutes on affordable housing. http://townofcarrboro.org/BoA/Agendas/2005/09_29_2005AoG.htm</p>
<p>6.13 Review the inventory of town owned land for the purpose of making unneeded tracts available for housing programs.</p>	<p>See CUP modification for Oakwood Apartments at http://www.townofcarrboro.org/BoA/Agendas/2002/08_20_2002_E1.pdf</p>
<p>6.14 Continue to advocate for inclusionary zoning techniques to increase the local stock of affordable housing.</p>	<p>See the following agenda reports: http://www.townofcarrboro.org/BoA/Agendas/2004/04_20_2004_D3.pdf http://www.townofcarrboro.org/BoA/Agendas/2005/02_01_2005_D5.pdf http://www.townofcarrboro.org/BoA/Agendas/2003/12_09_2003_E2.pdf and legislative agendas for 2005 – 2008 http://townofcarrboro.org/BoA/Agendas/2006/11_14_2006_6A.pdf</p>

6.1 Housing for a Diverse Population

Vision	2010 Status
6.15 Pursue density bonus provisions for projects incorporating environmentally sensitive development and building practices.	See draft sustainability resolution, referred to staff for review 3/17/09. http://www.townofcarrboro.org/BoA/Agendas/2009/03_17_2009.htm
6.16 Support the creation of more housing that allows senior citizens to interact fully with the larger community and has access to public transit.	The most recent subsidized senior citizen housing included Carolina Spring in 1996 and Covenant Place /UCC Living Center in 1997.
6.17 Interact with non-profits that work to provide affordable housing such as the Land Trust, Orange Community Housing Corporation, Empowerment, INC., and Habitat for Humanity.	LUO section 15-182.4 (b)2 requires consideration of interaction on p 9. http://townofcarrboro.org/pzi/PDFs/LUO/Art-xii.pdf
6.18 A minimum of 15 percent of the residential units in any residential development should meet the affordability criteria specified in Section 15-182.4 of the Carrboro Land Use Ordinance.	Affordable housing activity reported in zoning's Active Projects report. http://townofcarrboro.org/pzi/PDFs/ActiveProjectReport.pdf LUO Sec 15-82.4 Affordable Housing Density Bonus p.8 & Section 15-188 Size Limited p.24 http://townofcarrboro.org/pzi/PDFs/LUO/Art-xii.pdf

Seattle 2035 Equity Analysis



Overview

The City of Seattle is updating its Comprehensive Plan to guide how the City will grow and what kind of city we want to be. The City has released a Draft Environmental Impact Statement (EIS) evaluating four growth alternatives.

How can we grow while making sure everyone has what they need to succeed and thrive?

Throughout Seattle's history, some populations and neighborhoods have prospered at the expense of others as a result of racially discriminatory public policies. While social equity has been a core value of the Comprehensive Plan since its adoption in 1994, the City's Race and Social Justice Initiative (RSJI) did not exist until 2005.

We have prepared an Equity Analysis to identify how growth may benefit or burden marginalized populations. This analysis will inform potential strategies to lessen impacts and maximize opportunity for marginalized populations.

How did we conduct the Equity Analysis?

The analysis evaluated existing conditions, analyzed potential impacts of each alternative, and identified solutions with an eye toward the following questions:

- Are different distributions of growth more or less likely to displace marginalized populations and/or affect their access to opportunity?
- What strategies and investments are necessary to address the impacts of growth and maximize opportunities for equitable development?

Key Terms

Marginalized populations:

Low-income people, people of color, and English language learners

Access to opportunity:

The services, amenities, and other key determinants of social, economic, and physical well-being

Displacement:

The involuntary relocation of marginalized populations from their current neighborhood

Equitable development:

Public and private neighborhood investments, programs, and policies to meet the needs of marginalized populations and reduce disparities

Race and Social Justice Initiative (RSJI):

Seattle's effort to overcome institutional racism and eliminate racial disparities



Existing Conditions: Is Seattle Equitable Today?

We examined demographic, economic, and physical factors to understand current displacement risk and access to opportunity. The findings are expressed as the **Displacement Risk Index** and the **Access to Opportunity Index**. They show that disparities exist, leaving many marginalized populations at risk of displacement and without the means to succeed and thrive in life.

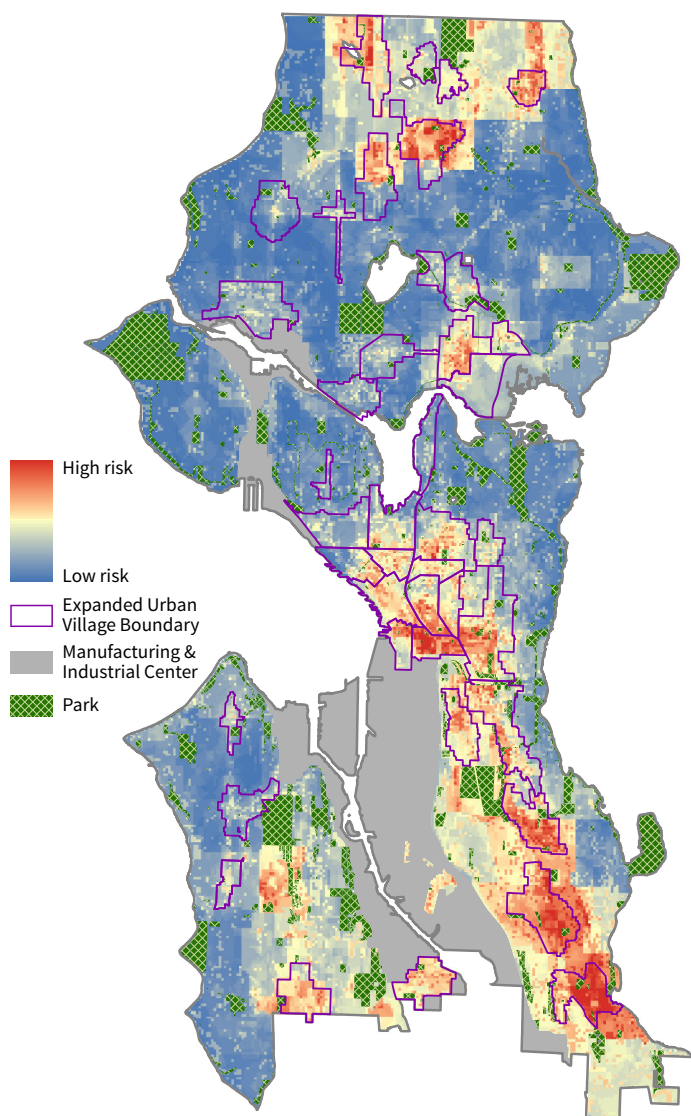
What is the Displacement Risk Index?

The Displacement Risk Index includes factors that increase the risk of marginalized populations being displaced.

What were the findings?

Displacement risk is greatest in neighborhoods that have historically been home to communities of color.

Displacement Risk Index



Criteria:

- Communities of color
- Low English-speaking ability
- Low educational attainment
- Renter households
- Housing cost-burdened households
- Low household income
- Access to frequent bus service
- Access to light rail / streetcar
- Proximity to core businesses
- Proximity to school, park, community center, or library
- Proximity to higher-income neighborhood
- Travel time to regional job center
- Development capacity
- Below-average median rent

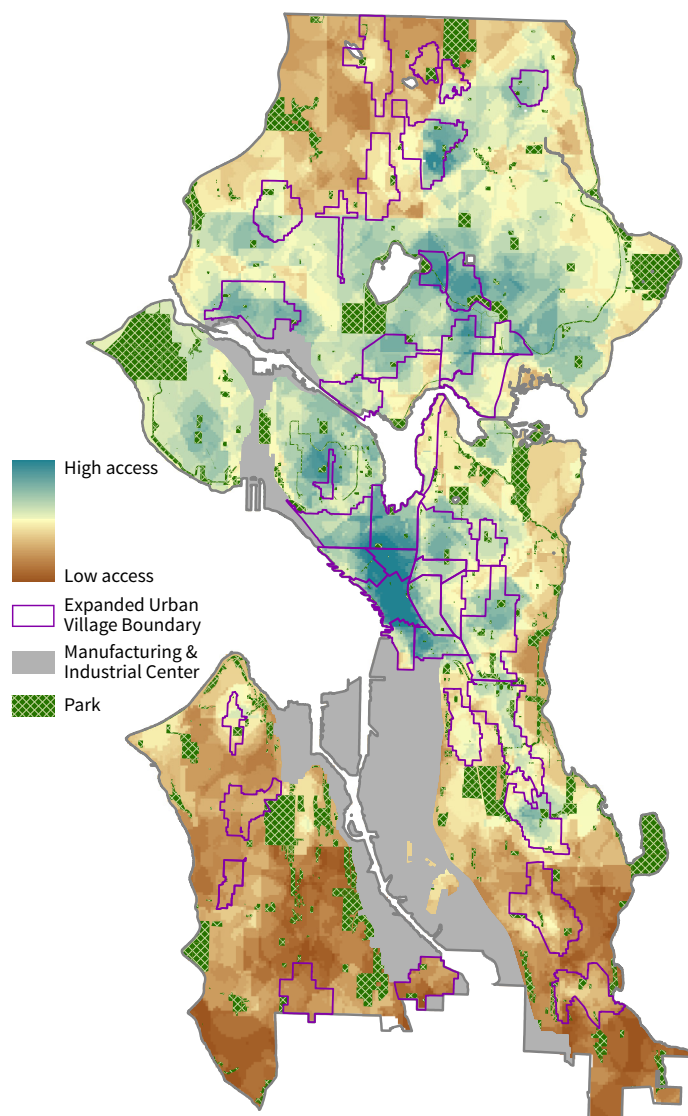
What is the Access to Opportunity Index?

The Access to Opportunity Index includes factors that contribute to social, economic, and physical well-being.

What were the findings?

Access to opportunity for marginalized populations is not equitably distributed.

Access to Opportunity Index







Criteria:

- High-performing elementary and middle schools
- Above-average high school graduation rate
- Number of jobs within two-mile radius
- Increase in median home value
- Access to frequent bus service
- Access to light rail / streetcar
- Proximity to a library
- Proximity to a community center
- Proximity to a park
- Proximity to a public health facility
- Access to fresh produce

How can displacement risk and access to opportunity inform our growth strategy?

Seattle's Urban Villages and Urban Centers fall into four categories based on their displacement risk and access to opportunity.

<p>High displacement risk Low access to opportunity</p> <ul style="list-style-type: none"> Displacement risk is high and requires mitigation to ensure new growth benefits marginalized populations as these areas change. Growth can bring new services and amenities and increase access to opportunity. <p>Representative areas: Bitter Lake, Othello, Rainer Beach, South Park, Westwood–Highland Park</p> <p>Potential equitable development strategies:</p> 	<p>High displacement risk High access to opportunity</p> <ul style="list-style-type: none"> New development could cause displacement if not coupled with public sector investment to stabilize existing communities. High demand areas with available amenities and opportunities. <p>Representative areas: Columbia City, Downtown, First Hill–Capitol Hill, North Beacon Hill, Northgate, North Rainier, University District, 23rd & Union–Jackson</p> <p>Potential equitable development strategies:</p> 	<p>Low displacement risk Low access to opportunity</p> <ul style="list-style-type: none"> These areas could absorb growth with minimal displacement, but access to opportunity is low. Each area varies in the gaps in services and amenities that will increase access to opportunity. <p>Representative areas: Admiral, Aurora–Liction Springs, Morgan Junction, West Seattle Junction, 130th & I-5</p> <p>Potential equitable development strategies:</p> 	<p>Low displacement risk High access to opportunity</p> <ul style="list-style-type: none"> These areas are in high demand and have fewer marginalized populations and expensive housing. Limited capacity for growth reduces the possibility for more choices for marginalized populations to live in these high-opportunity areas. <p>Representative areas: Ballard, Crown Hill, Eastlake, Fremont, Green Lake, Greenwood–Phinney Ridge, Madison–Miller, Roosevelt, South Lake Union, Upper Queen Anne, Uptown, Wallingford</p> <p>Potential equitable development strategies:</p> 
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What is Equitable Development?

Equitable development is an approach to creating healthy, vibrant communities and includes the investments, programs, and policies that meet the needs of marginalized populations and reduce disparities.

To achieve racial and social equity, we need **strong communities and strong people**. This means investing in strategies that build community stability and resilience in the face of displacement pressure and great neighborhoods throughout the city with equitable access for all.

A vision for an equitable Seattle

Seattle will be a diverse city where all people are able to achieve their full potential regardless of race or means. Seattle's neighborhoods will be diverse and will include the community anchors, supports, goods, services, and amenities people need to lead healthy lives and flourish.

Here's what we need to do to ensure new growth builds strong communities and strong people:

 <p>Advance economic mobility and opportunity</p> <p>Promote economic opportunities for marginalized populations and enhance community anchors. Provide access to quality education, training, and living-wage jobs.</p>	 <p>Prevent residential, commercial and cultural displacement</p> <p>Enact policies and programs that allow marginalized populations, businesses, and community organizations the ability to stay in their community.</p>	 <p>Build on local cultural assets</p> <p>Respect local community character, cultural diversity, and values. Preserve and strengthen cultural communities.</p>
 <p>Promote transportation and connectivity</p> <p>Prioritize investment in effective and affordable transportation that supports transit-dependent communities.</p>	 <p>Develop healthy and safe neighborhoods for everyone</p> <p>Create neighborhoods that enhance community health through access to public amenities, healthy food, and safe environments, for everyone.</p>	 <p>Equitable access to all neighborhoods</p> <p>Leverage private development to fill gaps in amenities and expand the supply and variety of housing and employment choices.</p>

Analysis of Growth Alternatives

The four growth alternatives differ in the distribution of growth throughout the city. Based on existing conditions, we analyzed each alternative based on its potential to displace marginalized populations and expand their access to opportunity.

More growth where displacement risk is high requires more public investment so that marginalized populations are not displaced. In low-risk, high-opportunity areas, more growth can leverage private development to increase access to opportunity for marginalized populations.

The table below summarizes the potential impacts of each growth alternative on displacement risk and access to opportunity.

Residential growth relative to number of existing housing units:



Key findings across all alternatives

- Access to opportunity for marginalized populations is unevenly distributed now and will continue to be limited under any alternative.
- Displacement risk is high now and will remain an issue under any alternative.
- The alternatives differ in the level of growth projected in areas where displacement risk is high.
- Alternatives 3 and 4 would require the greatest level of public investment to mitigate displacement.

Alternative 1	Alternative 2	Alternative 3	Alternative 4
Continue Current Growth Trends 	Guide Growth to Urban Centers 	Guide Growth to Urban Villages Near Light Rail 	Guide Growth to Urban Villages Near Transit
What level of public investment is necessary for marginalized populations to benefit from growth without displacement?			
Required public investment is in the middle compared to other alternatives because growth is more evenly distributed in both high- and low-displacement risk urban villages.	Potentially lower levels of investment needed because less growth is allocated in high-displacement risk areas. However, more growth would be in expensive high-rise construction.	Highest level of growth in high-displacement risk areas like Rainier Beach, Othello, and North Beacon Hill, requiring the greatest degree of anti-displacement mitigation.	Substantial anti-displacement investments required in the southeast Seattle urban villages with light rail stations where displacement risk is high.
How much does the alternative expand access to opportunity for marginalized populations?			
Allocates significant growth to a few urban villages where displacement risk is low and access to opportunity is high.	Does the least to expand access for marginalized populations because less growth is allocated to areas with high opportunity and low displacement risk.	Potential to expand access to opportunity in some, but not most, areas with low displacement risk and high access to opportunity.	Greater potential to grow in areas with high access to opportunity than Alternative 3, but limited potential to expand access in other high-access urban villages.

For more information

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Racial Equity Toolkit

to Assess Policies, Initiatives, Programs, and Budget Issues



RACE & SOCIAL JUSTICE
INITIATIVE

The vision of the Seattle Race and Social Justice Initiative is to eliminate racial inequity in the community. To do this requires ending [individual racism](#), [institutional racism](#) and [structural racism](#). The Racial Equity Toolkit lays out a process and a set of questions to guide the development, implementation and evaluation of policies, initiatives, programs, and budget issues to address the impacts on racial equity.

When Do I Use This Toolkit?

Early. Apply the toolkit early for alignment with departmental racial equity goals and desired outcomes.

How Do I Use This Toolkit?

With Inclusion. The analysis should be completed by people with different racial perspectives.

Step by step. The Racial Equity Analysis is made up of six steps from beginning to completion:



Racial Equity Toolkit Assessment Worksheet

Title of policy, initiative, program, budget issue: _____

Description: _____

Department: _____ Contact: _____

☐ Policy ☐ Initiative ☐ Program ☐ Budget Issue

Step 1. Set Outcomes.

1a. What does your department define as the most important racially equitable **community outcomes related to the issue?** *(Response should be completed by department leadership in consultation with RSJI Executive Sponsor, Change Team Leads and Change Team. Resources on p.4)*

1b. Which racial equity **opportunity area(s) will the issue primarily impact?**

☐ Education
☐ Community Development
☐ Health
☐ Environment

☐ Criminal Justice
☐ Jobs
☐ Housing

1c. Are there impacts on:

☐ **Contracting Equity**
☐ **Workforce Equity**

☐ **Immigrant and Refugee Access to Services**
☐ **Inclusive Outreach and Public Engagement**

Please describe:

Step 2. Involve stakeholders. Analyze data.

2a. Are there impacts on geographic areas? ☐ Yes ☐ No

Check all neighborhoods that apply *(see map on p.5)*:

☐ All Seattle neighborhoods
☐ Ballard
☐ North
☐ NE
☐ Central

☐ Lake Union
☐ Southwest
☐ Southeast
☐ Delridge
☐ Greater Duwamish

☐ East District
☐ King County (outside Seattle)
☐ Outside King County

Please describe:

2b. What are the racial demographics of those living in the area or impacted by the issue?

(See Stakeholder and Data Resources p. 5 and 6)

2c. How have you involved community members and **stakeholders?** *(See p.5 for questions to ask community/staff at this point in the process to ensure their concerns and expertise are part of analysis.)*

2d. What does data and your conversations with [stakeholders](#) tell you about existing racial inequities that influence people's lives and should be taken into consideration? (See *Data Resources* on p.6. *King County Opportunity Maps* are good resource for information based on geography, race, and income.)

2e. What are the root causes or factors creating these racial inequities?

Examples: Bias in process; Lack of access or barriers; Lack of racially inclusive engagement

Step 3. Determine Benefit and/or Burden.

Given what you have learned from data and from stakeholder involvement...

3. How will the policy, initiative, program, or budget issue increase or decrease racial equity? What are potential unintended consequences? What benefits may result? Are the impacts aligned with your department's community outcomes that were defined in Step 1?

Step 4. Advance Opportunity or Minimize Harm.

4. How will you address the impacts (including unintended consequences) on racial equity? What strategies address immediate impacts? What strategies address root causes of inequity listed in Q.6? How will you partner with stakeholders for long-term positive change? If impacts are not aligned with desired community outcomes, how will you re-align your work?

Program Strategies? _____

Policy Strategies? _____

Partnership Strategies? _____

Step 5. Evaluate. Raise Racial Awareness. Be Accountable.

5a. How will you evaluate and be [accountable](#)? How will you evaluate and report impacts on racial equity over time? What is your goal and timeline for eliminating racial inequity? How will you retain stakeholder participation and ensure internal and public accountability? How will you raise awareness about racial inequity related to this issue?

5b. What is unresolved? What resources/partnerships do you still need to make changes?

Step 6. Report Back.

Share analysis and report responses from Q.5a. and Q.5b. with Department Leadership and Change Team Leads and members involved in Step 1.

Creating Effective Community Outcomes

Outcome = the result that you seek to achieve through your actions.

***Racially equitable* community outcomes = the specific result you are seeking to achieve that advances racial equity in the community.**

When creating outcomes think about:

- What are the greatest opportunities for creating change in the next year?
- What strengths does the department have that it can build on?
- What challenges, if met, will help move the department closer to racial equity goals?

Keep in mind that the City is committed to creating racial equity in seven key opportunity areas: **Education, Community Development, Health, Criminal Justice, Jobs, Housing, and the Environment.**

Examples of community outcomes that increase racial equity:

OUTCOME	OPPORTUNITY AREA
Increase transit and pedestrian mobility options in communities of color.	Community Development
Decrease racial disparity in the unemployment rate.	Jobs
Ensure greater access to technology by communities of color.	Community Development, Education, Jobs
Improve access to community center programs for immigrants, refugees and communities of color.	Health, Community Development
Communities of color are represented in the City's outreach activities.	Education, Community Development, Health, Jobs, Housing, Criminal Justice, Environment
The racial diversity of the Seattle community is reflected in the City's workforce across positions.	Jobs
Access to City contracts for Minority Business Enterprises is increased.	Jobs
Decrease racial disparity in high school graduation rates	Education

Additional Resources:

- **RSJI Departmental Work Plan:** <http://inweb/rsji/departments.htm>
- **Department Performance Expectations:** <http://web1.seattle.gov/DPETS/DPETSWEbHome.aspx>
- **Mayoral Initiatives:** <http://www.seattle.gov/mayor/issues/>

Identifying Stakeholders + Listening to Communities of Color

Identify Stakeholders

Find out who are the **stakeholders** most affected by, concerned with, or have experience relating to the policy, program or initiative? Identify racial demographics of neighborhood or those impacted by issue. (See *District Profiles* in the [Inclusive Outreach and Public Engagement Guide](#) or refer to U.S. Census information on p.7)

Once you have identified your stakeholders

Involve them in the issue.

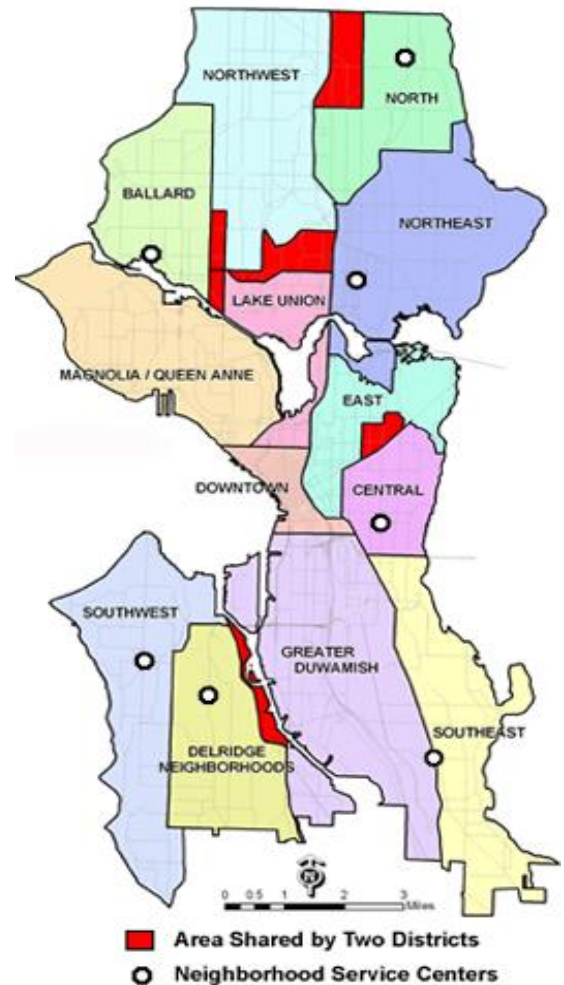
Describe how historically underrepresented community stakeholders can take a leadership role in this policy, program, initiative or budget issue.

Listen to the community. Ask:

1. What do we need to know about this issue? How will the policy, program, initiative or budget issue burden or benefit the community? (*concerns, facts, potential impacts*)
2. What factors produce or perpetuate racial inequity related to this issue?
3. What are ways to minimize any negative impacts (harm to communities of color, increased racial disparities, etc) that may result? What opportunities exist for increasing racial equity?

Tip: Gather Community Input Through...

- Community meetings
- Focus groups
- Consulting with City commissions and advisory boards
- Consulting with Change Team



Examples of what this step looks like in practice:

- A reduction of hours at a community center includes conversations with those who use the community center as well as staff who work there.
- Before implementing a new penalty fee, people from the demographic most represented in those fined are surveyed to learn the best ways to minimize negative impacts.

For resources on how to engage stakeholders in your work see the **Inclusive Outreach and Public Engagement Guide**: <http://inweb1/neighborhoods/outreachguide/>

Data Resources

City of Seattle Seattle's Population and Demographics at a Glance:

http://www.seattle.gov/dpd/Research/Population_Demographics/Overview/default.asp

Website updated by the City Demographer. **Includes: Housing** Quarterly Permit Report • **Employment data** • 2010 Census data • **2006-2010 American Community Survey** • 2010 Census: Demographic highlights from the 2010 Census; Basic Population and Housing Characteristics Change from 1990, 2000, and 2010 – PDF report of counts of population by race, ethnicity and over/under 18 years of age as well as a total, occupied and vacant housing unit count; Three-page subject report – PDF report of detailed population, household and housing data • American Community Survey: **2010 5-year estimates and 2009 5-year estimates** • Census 2000 • Permit Information: Comprehensive Plan Housing Target Growth Report for Urban Centers and Villages; Citywide Residential Permit Report • Employment Information: Comprehensive Plan Employment Target Growth Report for Urban Centers and Villages; Citywide Employment 1995-2010 • The Greater Seattle Datasheet: a report by the Office of Intergovernmental Relations on many aspects of Seattle and its region.

SDOT Census 2010 Demographic Maps (by census blocks): Race, Age (under 18 and over 65) and Median Income http://inweb/sdot/rsji_maps.htm

Seattle's Population & Demographics Related Links & Resources (From DPD website:

http://www.seattle.gov/dpd/Research/Population_Demographics/Related_Links/default.asp)

Federal

- [American FactFinder](#): The U.S. Census Bureau's main site for online access to population, housing, economic, and geographic data.
- [Census 2000 Gateway](#): The U.S. Census Bureau's gateway to Census 2000 information.

State

- [Washington Office of Financial Management](#): OFM is the official state agency that provides estimates, forecasts, and reports on the state's population, demographic characteristics, economy, and state revenues.

Regional

- [Puget Sound Regional Council](#): PSRC is the regional growth management and transportation planning agency for the central Puget Sound region in Washington State.

County

- [King County Census Viewer](#): A web-based application for viewing maps and tables of more than 100 community census data indicators for 77 defined places in King County.
- [King County Department of Development and Environmental Services](#): the growth management planning agency for King County.
- [Seattle & King County Public Health - Assessment, Policy Development, and Evaluation Unit](#): Provides health information and technical assistance, based on health assessment data
- [King County Opportunity Maps](#): A Study of the Region's Geography of Opportunity. Opportunity maps illustrate where opportunity rich communities exist, assess who has access to those neighborhoods, and help to understand what needs to be remedied in opportunity poor neighborhoods. Puget Sound Regional Council.

City

- [The Greater Seattle Datasheet](#): A Seattle fact sheet courtesy of the City of Seattle's Office of Intergovernmental Relations.

Other

- [Seattle Times Census 2000](#): articles, charts related to Census 2000 and the Seattle/Puget Sound region.

Glossary

Accountable- Responsive to the needs and concerns of those most impacted by the issues you are working on, particularly to communities of color and those historically underrepresented in the civic process.

Community outcomes- The specific result you are seeking to achieve that advances racial equity.

Contracting Equity- Efforts to achieve equitable racial outcomes in the way the City spends resources, including goods and services, consultants and contracting.

Immigrant and Refugee Access to Services- Government services and resources are easily available and understandable to all Seattle residents, including non-native English speakers. Full and active participation of immigrant and refugee communities exists in Seattle's civic, economic and cultural life.

Inclusive Outreach and Public Engagement- Processes inclusive of people of diverse races, cultures, gender identities, sexual orientations and socio-economic status. Access to information, resources and civic processes so community members can effectively engage in the design and delivery of public services.

Individual racism- Pre-judgment, bias, stereotypes about an individual or group based on race. The impacts of racism on individuals including white people internalizing privilege and people of color internalizing oppression.

Institutional racism- Organizational programs, policies or procedures that work to the benefit of white people and to the detriment of people of color, usually unintentionally or inadvertently.

Opportunity areas- One of seven issue areas the City of Seattle is working on in partnership with the community to eliminate racial disparities and create racial equity. They include: Education, Health, Community Development, Criminal Justice, Jobs, Housing and the Environment.

Racial equity- When social, economic and political opportunities are not predicted based upon a person's race.

Racial inequity- When a person's race can predict their social, economic and political opportunities and outcomes.

Stakeholders- Those impacted by proposed policy, program or budget issue who have potential concerns or issue expertise. Examples might include: specific racial/ethnic groups, other institutions like Seattle Housing Authority, schools, community-based organizations, Change Teams, City employees, unions, etc.

Structural racism - The interplay of policies, practices and programs of multiple institutions which leads to adverse outcomes and conditions for communities of color compared to white communities that occurs within the context of racialized historical and cultural conditions.

Workforce Equity- Ensure the City's workforce diversity reflects the diversity of Seattle

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Equity and Social Justice

Fair and just.

This principle, stated in our county's strategic plan, is incorporated into all of our work at King County. We recognize that our economy and quality of life depends on the ability of everyone to contribute. We will work to remove barriers that limit the ability of some to fulfill their potential. It is troubling that race, income, neighborhood are each major predictors of whether we graduate from high school, become incarcerated, how healthy we are, and even how long we will live. We are committed to implementing our equity and social justice agenda, to work toward fairness and opportunity for all.

New and noteworthy

Call for literary and spoken word artists

King County seeks up to eight individual literary artists to participate in readings as part of its Cultivating a Culture of Equity and Social Justice through Literature and Poetry project. [Applications due on September 14.](#)

2015 Governing for Racial Equity Conference

The King County and partner jurisdictions are convening the 2015 Governing for Racial Equity Conference on June 11-12, 2015, at the Washington State Convention Center in Seattle, Washington. [Learn more.](#)

Determinants of Equity Report

The [Determinants of Equity Report \(January 2015\)](#) is a catalog of community-level indicators and King County data covering the 13 Determinants of Equity. This

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[2014 Equity and Social Justice Report](#) ☐

landmark report is intended to support the ESJ Strategic Plan and be a catalyst for conversations on how we can incorporate equity measures into ongoing business and performance management processes.

New 2014 Equity and Social Justice Annual Report

Read the [report](#) and learn how King County is building equity by increasing access to health care, creating communities of opportunity, embedding equity in the budget process, becoming a more equitable and diverse employer, and more.

King County Equity and Social Justice Strategic Plan

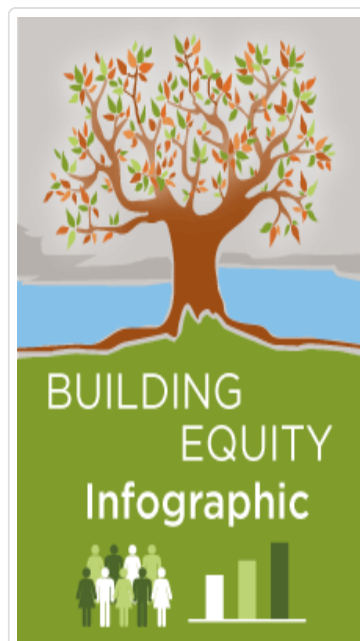
In September 2014, King County Executive Dow Constantine signed an [Executive Order calling for the development of the first Strategic Plan](#) for King County Equity and Social Justice, involving county agencies, employees and the community.

Report on serving limited-English proficiency populations in King County

In June 2014 and after meeting with local community leaders and organizations, a Limited English Proficiency (LEP) Workgroup issued its report with research findings and recommendations on how King County may increase access to government services and better work with limited-English speaking populations. Read the [full LEP proviso report with findings and recommendations](#) and the [transcript of the panel with community leaders](#).

Building equity and opportunity

In his State of the County speech in February 2014, King County Executive Dow Constantine addressed what he called "the great generational challenges of our time" -- building equity in our community, and confronting climate change. You can [watch a video](#) of the speech. See the [new infographic on building equity and opportunity in King County](#) and the [Executive's policy brief on King County's efforts to build a shared and sustainable prosperity](#).



[ESJ Building Equity Infographic](#)



[Determinants of Equity \(Jan. 2015\)](#) □



Vision

King County serves all residents by promoting fairness and opportunity and eliminating inequities.. [Learn more...](#)



Tools & resources

The Equity Impact Review Tool, the Community Engagement Guide and the Translation Executive Order are some of the tools to identify equity impacts of programs, policies and decision and to improve fairness. [Learn more...](#)



Team

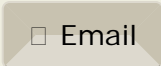
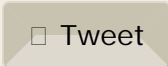
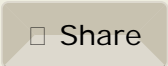
The Office of Equity and Social Justice works jointly with the Inter Branch Team - representing all branches, departments, agencies and offices of county government - to facilitate accountability and collaboration in order to advance the "fair and just" principle within the county. [Learn more...](#)



Our work in action

For the past several years, ESJ has helped to shape and change policy, outreach, communications and planning in King County government. [Learn more...](#)

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Intervention Plan for the Latino Community in Muscatine

Organization and Community Practice

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School of Social Work

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Nateasa McGuire

April 2014

Intervention Plan

Introduction

Muscatine, Iowa is a strong community; a community that wants to improve through a variety of sustainable initiatives. There is a desire within the formal leadership of this community to be inclusive of all perspectives in the development of these initiatives. The scenic town of Muscatine located along the Mississippi river provides a beautiful place for residents to live, work, and engage with one another. Mark Twain wrote, “I remember Muscatine for its sunsets. I have never seen any on either side of the ocean that equaled them” (City of Muscatine, 2014).

Even with all its beauty and inclusive desires of the towns’ leadership, there remains a significant demographic of the population that lives and works within the community yet seems to be prevented from involvement in community decision making. This demographic is the Latino population, which represents 16.6% of the total population of Muscatine (U.S. Census Bureau, 2010). While there are certainly many factors that contribute to this lack of involvement, one may look no further than the formal leadership itself to view, from a top-down perspective, a lack of representativeness among those that are within positions of power within the community. We came to this focus on formal leadership given information gathered through a needs and strengths assessment of the issue. Informants reported that word of mouth and social networks were important for engaging the Latino community, at the same time cultural competence of leadership in Muscatine was identified as a need for the Latino community. Leadership is therefore our focus for successfully engaging the Latino community in future health initiatives in Muscatine.

Given the educational, economic, and social intersections of the Latino segment and the rest of the population, we propose two interventions. The first places leaders of the Latino

population in positions of formal leadership within the community. The second is the formation of a Latino youth leadership organization that is given a voice within formal community leadership positions.

Goals

The goals for our intervention include specified impacts for major change, long-term outcomes, and short-term outcomes. The community issue presented would be alleviated if our four comprehensive, interconnected impacts were seen within the community. The first overall goal is for the Latino community to be fairly represented through formal and elected leadership roles within the community of Muscatine. This goal, if achieved, facilitates our additional goals. A second goal is to observe an increase in integration and cohesion amongst all populations within the community of Muscatine. By integration, we do not imply homogeneity or forced assimilation, rather a community where all are free to participate. The third goal is for the needs of the Muscatine Latino population to be met through representation and community resources. The last goal is for there to be more involvement of the Latino population in community initiatives. We believe our main goals of integration, resource allocation, and initiative involvement can be achieved if there is change in formal representation but we realize that all concepts are interconnected and interdependent.

Methods/Group Engagement

Muscatine is a community for all those who live within the community. Nearly 20% of the community is Latino. We did not intend to imply that the community at large is distinctly separate from the Latino community, however, we cannot deny the consistent sentiment expressed in all our key informant interviews that there exists community disconnect. The two underlying assumptions behind our method for intervention are basic: community members care

about their communities and communities flourish when all are equally incorporated. When we connect the identified resources with our recommended activities, we envision goal attainment because our methods employ concepts previously established as successful. Connecting people through groups is an important task because there exists a barrier similar to Dudley Street Neighborhood Initiative in improving the community issue (Medoff & Sklar, 1994). Connecting all invested community members is necessary because it will discredit “the common myth that the residents ... do not really care about their neighborhood,” (Putnam & Feldstein, 2003). We think that in the community of Muscatine a common cognitive error has been used to justify minimal Latino involvement: those from the Latino community do not attend meetings/events therefore, they are not interested in participating. We think facilitating a dialogue between all interested parties would diminish the need for this justification and would start eroding this assumption.

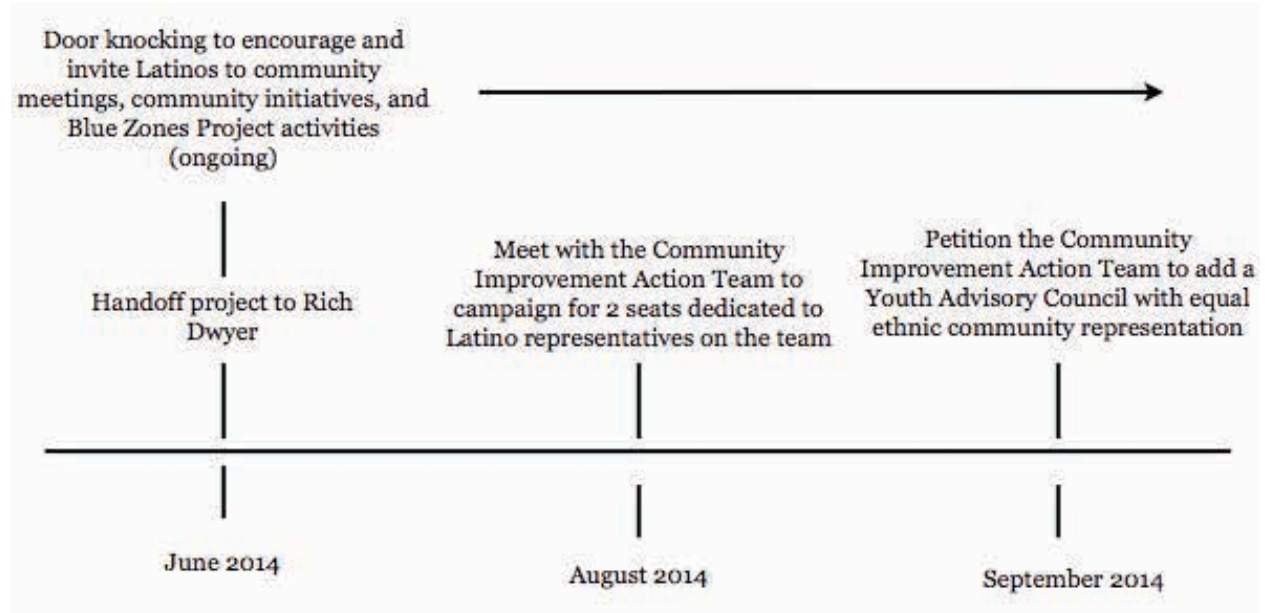
Much like the Dudley Street Neighborhood Initiative (Medoff & Sklar, 1994) we think that collective, political action is often what yields the best results which is why we want to connect willing, informal Latino leaders directly with Mayor Hopkins and the CIAT. There are two main forces behind community improvement: collaboration and empowerment (Itzhaky & York, 2002). In working toward equal representation in formal leadership roles “individuals, families, groups, and communities increase their personal, interpersonal, socioeconomic, and political strength and develop influence toward improving their circumstances,” (Itzhaky & York, 2002).

As we conducted our key informant interviews, we learned about the importance of in-person communication and the value placed on the Latino youth for bridging community and family. This informs the remaining two intervention areas: door knocking initiatives and a youth

advisory committee. From the information gathered during our interviews it seems petitioning door-to-door would be the favored route for reaching the Muscatine Latino population. Those conducting the door knocking would be Blue Zones Project members who are familiar or particularly invested in increasing Latino community member involvement and potential members of the Community Improvement Action Team and/or the Youth Advisory Council. The activity of door knocking is inspired, in part, by asset-based community development; we think that communities know their needs but require organizing and idea promotion.

The idea of the Latino youths being the bridge between family and community was a common theme in our interviews. A Youth Advisory Council affiliated with the Community Improvement Action Team would allow for valuable input that is delivered directly to community leaders who can enact change. The council is inspired by research conducted on the needs of the GLBTQ youths within Miami Dade County. Researchers found “substantial differences between youth and adult perceptions of need” and we believe this discovery is not unique to the area nor the population (Craig, 2001). Youth representation was essential in the Dudley Street Initiative (Medoff & Sklar, 1994). Additionally, a youth leadership group has been successful in community and policy advocacy for health in Santa Cruz, California. This youth leadership group engages Latino youth specifically in youth development as well as policy advocacy (Robert Wood Johnson Foundation, 2013). Together our methods for alleviating the community issue involve individual and group connections, in-person communication, and a focus on youth representation.

Proposed Activities Timeline



Strengths

The Muscatine community has several strengths to draw from to attempt to address the issue of separation between the Latino population and majority population of the community. The Community Improvement Action Team comprised of several community leaders who are members of the majority population, are interested in gaining insight into strategies to bridge the cultural divide. Likewise, there are leaders within the Latino population of the community that share these interests. The community as a whole has taken part in the Blue Zones Project in an attempt to transform Muscatine into a sustainable community that provides ways for all members to engage in healthy lifestyles. Placing informal Latino leaders in places of formal leadership within the Muscatine community creates a win-win situation. The current leadership will be able to gain insight into the perspectives of the Latino population and the Latino population will have representation and be empowered to provide input into the community decision-making process.

Duplication

In order to avoid duplicating work that other groups or organizations in Muscatine may also be engaging in, we will be providing our intervention plan to the Community Improvement Action Team, which is creating a comprehensive plan for community development. This comprehensive plan will include input from all groups and will outline the specific steps that the community as a whole will focus on.

Ethical Issues

Presently, there is a risk of community decisions being made without input from a significant portion of the population. This intervention addresses that ethical issue, but may bring up additional ethical issues. By appointing or electing Latino representation in positions of leadership within the general community, the perceptions and needs of the Latino population can be accurately reflected in community decision making. Latino representation increases the Latino population's right to self-determine through making choices about their community. Promoting self-determination is aligned with the NASW's Code of Ethics.

While this will allow culturally informed decisions about community initiatives to be made, there are ethical issues in determining who shall represent the Latino population. The risk of coercion and/or retaliation is possible and could come from either the Latino or majority population if either party disagrees with the representative. However, by drawing from informal leadership within the Latino population, using door-knocking to generate awareness, as well as relying upon the Community Improvement Action Team's willingness and desire to gain input from the Latino population, these ethical issues have been minimized. Not only do these interventions promote self-determination, they also, as stated by the National Association of Social Workers (2008):

promote policies and practices that demonstrate respect for difference, support the expansion of cultural knowledge and resources, advocate for programs and institutions that demonstrate cultural competence, and promote policies that safeguard the rights of and confirm equity and social justice for all people.

Logic Model

Resources	Activities	Outputs	Short-term outcomes	Long-term outcomes	Impact
*Support from the Latino community Latino leaders willing to take on formal roles and stand as role models *Support from the Community Action team Support of the mayor to appoint Latino representatives *Support from Iowa for Sustainable Communities High School students willing to represent the youth population	*Appointment of 2 Latino representatives to the Community Action Team * Community I.... Action Team initiates a Youth Advisory Council with at least equal ethnic community representation *Door-knocking activities to invite Latinos to community meetings and spread the word about community initiatives and the Blue Zones Project	*2 seats on the Community Leadership Team filled with Latino representatives * Youth Advisory Council program to work with the Community Action Team has staff person and engages 10 youth *50% of Latino population accessed through door knocking activities *50% of Latino population knows about Blue Zones Project and other community initiatives	*2 appointments of Latino representatives to the Community Action Team * Youth Advisory Council to Community Action Team at least 20% Latino *10% of Latino population enrolled in Blue Zones Project *5% of those attending community initiatives meetings are Latino	*20% of formal leadership roles in the community held by Latino representatives (or current proportion of the population- if 15% of population is Latino than 15% of formal leadership roles held by Latinos) *30% of Latino population enrolled in Blue Zones Project *20% (or current Latino proportion of the population) of those attending community initiative meetings are Latino	*Equal representation of the Latino community in formal and elected leadership roles *Increased integration of the Latino population and Latino youth in the Muscatine community *Needs of Latino community being met through community resources and representation *Involvement of the Latino population in community initiatives

Evaluation Plan

The Community Improvement Action Team (CIAT) will be largely responsible for overseeing whether or not membership suggestions have been met. Their cooperation will be imperative to the success of this plan. First, the CIAT will need to indicate whether a Youth Advisory Council (YAC) has been developed. After initial formation, the percentage of Latino youth involved should be evaluated approximately one month after interest in the council has been determined in the community. By having each new member fill out a membership form, it would be relatively easy for the CIAT to track how many members identify as Latino. If after the month passes, and the short-term goal of 20% of members identifying as Latino has not been met, additional outreach may be required and a follow-up evaluation should be conducted approximately two to three weeks later by a member of the CIAT. Outreach activities can include recruitment presentations by the CIAT at the local schools and centers in the area.

After having a discussion with the mayor and CIAT about the importance of having a representative number of Latino leaders on the team, a check-in with both the mayor and CIAT will determine whether or not an agreement has been reached and if two seats are available for appointment of Latino community members. This check-in on the appointment process should take place approximately one month after door-knocking and other community outreach processes have occurred. After this time period, a member of the CIAT will be responsible for indicating if interest in the seats has been voiced, and will further monitor the appointment of two Latino community members to the team.

Door knocking activities will be completed by obtaining maps of Muscatine which will indicate the ethnic breakdown of the different neighborhoods, and will show those involved where Latino individuals primarily reside. The CIAT should use these maps as a guide to determine where to begin with the outreach. By having each individual indicate how many

homes he or she visits, it will be possible to determine the overall percentage of Latino individuals who have been reached by this effort. It would then be possible to indicate how many individuals were informed about the Blue Zones project and the community meetings. This would also serve as an excellent time to tell those interested in leadership roles about the opportunity to be a part of the CIAT, and to advise their children of the opportunity to become involved with the YAC. The number of individuals reached each day of outreach should be documented by members of the CIAT, and efforts should be continued until at least 50% of the population has been reached. At each of the community meetings, sign-in sheets could be distributed to all in attendance, asking for the individual's name and identified ethnicity. This should be completed at each meeting, and tracked over time to see if the number of Latino individuals in attendance is increasing.

Indicators of success

Our short-term outcomes will indicate whether steps are being taken to reach the long-term outcomes. If the short-term outcomes are reached, the long-term outcomes will be much more obtainable. The outcomes are all measurable. Generally, evaluation of the previously listed outcomes will require obtaining information from membership rosters and attendance sheets to indicate whether desired numbers have been reached.

Once the CIAT agrees to help with the creation of a YAC to work with them, this will be the first indicator of success. In order to create and encourage more Latino youth representation, a short-term indicator of success will be obtaining a membership which has at least 20% of members identifying as Latino. By having each new member fill out a membership form, it would be relatively easy for the CIAT to track how many members identify as Latino. The CIAT will help the needs of the youth community be heard, and can help guide them to become

more involved in the community and schools. It is also hoped that the creation of a strong youth council will create strong leaders who may strive for seats on the CIAT in the future.

After the CIAT and mayor understand the importance, and agree to have two seats available for Latino members on the team, the next indicator of success would be the appointment of the individuals to the seats. This could be accomplished through an election or volunteers who would like to take on the position. Through the outreach efforts previously described, it is hoped that interested individuals will come forward and take advantage of this opportunity. The appointment of two Latino representatives to the CIAT indicates that steps are being taken in the right direction to ensure that this representation is carried over into the future and that the needs of the Latino community will continue be heard.

The Blue Zones project is making strides to involve more of the Latino population in the health initiatives in Muscatine. A short-term indicator of increased participation would be to have 10% of the Latino population involved in some form with the initiatives. Involving at least 10% of the population would be an encouraging start to the eventual desired outcome of at least 30% of the population expressing involvement. Through the door-knocking activities, Latino community members will learn not only about the Blue Zones project, but also community initiative meetings that they will have the opportunity to attend. Face-to-face communication was indicated as being much more favorable, rather than more formal methods, among Latino key informants, so it is hoped that this will serve as an effective way to increase awareness and attendance. A short-term indicator of success will be having at least 5% of those attending community initiative meetings identifying as Latino. This would be an encouraging step in right direction towards the long-term goal of 20%. We hope that these activities will sufficiently

allow us to reach our long-term outcomes, and increase Latino representation of all age groups in the community of Muscatine.

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Additional Resources on Youth Leadership

Institute of Medicine: Jóvenes Santos presentation

<http://www.iom.edu/Activities/PublicHealth/PopulationHealthImprovementRT/2014-APR-10/Videos/Panel%20I/5-Jovenes-Sanos-Video.aspx>

Jóvenes Sanos

<http://www.sanoshealth.com/>