HORACE WILLIAMS CITIZENS' COMMITTEE

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RECOMMENDED PRINCIPLES, GOALS AND STRATEGIES FOR GUIDING THE DEVELOPMENT OF THE HORACE WILLIAMS PROPERTY (CAROLINA NORTH)

REPORT TO CHAPEL HILL TOWN COUNCIL

OCTOBER 8, 2003

INTRODUCTION

The Horace Williams Citizens' Committee is pleased to present to the Chapel Hill Town Council the Committee's report on principles, goals and strategies for the University's plans for Carolina North at the Horace Williams site.

This report contains all the recommendations that the Committee has approved to date. On August 25, 2003 the Committee presented a broad brush "Progress Report" that included all of the Committee's principles and goals. Since that time, the Committee has met to complete the report by adopting strategies for implementing its principles and goals.

The Committee hopes that Council will transmit the recommendations in this report to the University in time for the University to take them into consideration as it prepares its conceptual plan.

PURPOSE OF REPORT

This report responds to the Town Council's charge to:

- Develop a set of Principles, including community interests and goals and objectives, to guide the Council's deliberations with the University of North Carolina at Chapel Hill regarding the development of the Horace Williams property (Carolina North), including the following topic areas:
    - Water/sewer
    - Hazardous waste
    - Stormwater
    - Transportation modes, including transit, bicycle, pedestrian, and auto
    - Housing
    - Schools
    - Natural area protection
    - Fiscal equity
    - Neighborhood interface
    - Parks and Recreation space/facilities

- Provide advice to the Council concerning Town input to the University related to those Principles that should be considered as the University's plan is prepared.
- Keep the Council informed about work in progress on a regular basis, beginning with a preliminary report 90 days after the first Committee meeting.
- Propose a process for Council consideration identifying points in the process where Public Hearings and Forums would be appropriate, to be able to bring information to the attention of the community and provide opportunity for citizen comment.
- Prepare recommendations for the Council's consideration regarding the University's plan for the Horace Williams property once a proposal is developed.

- Provide advice to the Council about ways to incorporate these Principles into the Council's ultimate zoning and ordinances for the Horace Williams property.

ORGANIZATION OF REPORT

The report is divided into the following topic areas: Development Management; Neighborhood and Community Interface; Water and Sewer/Stormwater Management/Air Quality; Natural Areas/Park and Recreation Facilities; and Transportation and Land Use.

In each topic area, recommendations consist of broad principles followed by more specific goals and implementation strategies. This report also includes general principles and working assumptions that apply to every topic area.

APPROVAL OF RECOMMENDED PRINCIPLES, GOALS AND STRATEGIES

The Committee has approved all of the principles, goals and strategies listed on the following pages. A vote of at least two thirds of the Committee members in attendance was achieved for all of the adopted principles and goals and, with one exception, all of the strategies. In most cases the Committee reached full consensus on the wording; footnotes show votes where there was not unanimous support. Dissenting Committee members were given the opportunity to provide comments in the form of footnotes to clarify their position on any issue. These comments are listed at the end of the report.

GENERAL PRINCIPLES

Principle 1: Carolina North shall adhere to the following basic sustainability principles as defined by the Sustainable Development Task Force in its October 1998 Report to the Chapel Hill Town Council: Create healthy living environments; protect, restore and maintain ecological integrity; conserve energy and natural resources, and use them efficiently; balance social, economic and environmental concerns in decision-making; promote equity, human dignity and social justice.

Principle 2: Development on the Horace Williams property shall benefit the University, the towns of Chapel Hill and Carrboro, Orange County, and the surrounding areas, as well as the state of North Carolina. The planning and execution of Carolina North shall be a model of cooperation for the mutual benefit of all stakeholders.

Principle 3: The Town and the University shall recognize the cumulative impacts of University and Town growth on our natural uses and our public facilities, as well as the need to monitor and evaluate these impacts in terms of mitigation and/or alternative approaches to retaining the charm of the Town and the quality of life which both the citizens of the Town and the State of North Carolina expect from Chapel Hill.[i]

WORKING ASSUMPTIONS

Assumption 1: The remediation of all waste sites on the Horace Williams property shall be adequately addressed in accordance with the end use.[ii]

Assumption 2: The Horace Williams Airport will be closed by January 1, 2005.

DEVELOPMENT MANAGEMENT PRINCIPLES

Principle 1: Manage development of Carolina North to minimize impacts on neighborhoods and the environment.

Goal 1: Phase the development of Carolina North to ensure that transportation infrastructure, retail, recreation and civic facilities and housing will be provided concurrently with and in proportion to academic and research uses to minimize disruption to the surrounding neighborhoods and ensure the sustainability of the mixed-use area.

Strategies

a) Build infrastructure (on-site and off-site) at the beginning of the project so that roads, transit, installation of utilities, and other construction will not be an ongoing disruption to the surrounding neighborhoods.[iii]

Goal 2: Adopt a master plan and establish a review system for Carolina North to ensure that development over the long term conforms with the Town's objectives.

Strategies

a) Establish a standing Town/Gown advisory committee to monitor and report regularly to Town Council on the development and implementation of Town-approved plans for Carolina North.
b) Establish a planning review process that will allow Council adequate time for input from the public and from Town staff on development plans and modifications of those plans.
c) Actively enforce the LUMO (Land Use Management Ordinance).
d) Require that any industrial use, including power plants, be subject to an individual Special Use Permit review by the Council.

Goal 3: Minimize environmental and community impacts of construction.

Strategies

a) Adopt sedimentation and erosion control plans in consultation with the Town to control stormwater during construction with necessary temporary devices to ensure that water run-off will not adversely affect adjacent properties; Bolin Creek; Crow's Branch; Eastwood Lake; and Lake Ellen.
b) Protect specimen trees and natural areas as designated on plan during construction. Write protections into permits and construction specifications. Prohibit heavy equipment and parking within tree drip line and in areas delineated on plan as undisturbed areas.
c) Identify and mitigate localized flooding problems likely to occur during storm events.
d) Ensure that at least two lanes of all Town roads are kept open for local traffic during peak traffic periods. Include Chapel Hill - Carrboro School System in agreement on hours of construction.

e) Provide a plan to protect the safety of bicyclists, pedestrians, and motorists during construction.
f) Roads damaged during construction shall be repaired promptly by developer and in accordance with Town standards.

NEIGHBORHOOD AND COMMUNITY INTERFACE PRINCIPLES

Principle 1: Planning for Carolina North shall address community needs for housing, schools, and other facilities.

Goal 1A: Create a diversity of housing levels, types and values that reflect the salaries of those using the site. Provide a minimum of 25% of housing for the number of jobs and students at Carolina North.

Goal 1B: Provide adequate residential parking.

Goal 1C: Produce housing in an environmentally sound manner with respect to design, siting, materials, and resource use.

Goal 1D: Include civic uses in the built environment.

Strategies

a) Evaluate and provide as necessary the facility needs of neighboring and Carolina North residents with respect to schools (especially daycare and K-5), recreation, commerce, and civic uses such as fire and police stations, polling places, libraries, senior and civic meeting space.

Principle 2: Create a campus facility that is open, welcoming and part of the community fabric while at the same time respecting the privacy and integrity of adjoining neighborhoods.

Goal 2A: Integrate community concerns in the design of Carolina North.

Strategies

a) Develop the major entranceways on the existing arterials: on Airport Road, on Estes Drive Extension east of the student storage lot, and on Homestead Road. Orient the development to Airport Road , make it visible from the street, enhance access and create an urban aesthetic. Place buildings closer to Airport Road than the 250-foot setback suggested in the Ayers Saint Gross plan.[iv]
b) Buffer neighborhoods from Carolina North. Develop standards working with the Town and neighbors to protect neighborhoods from noise, light pollution, parking facilities and mechanical buildings and providing for protective buffers.
c) Limit motor vehicle access to and from existing neighborhoods through roadway design and placement, and create non-motorized-only access such as walking routes or bikeways.
d) Roadway design within Carolina North should be used to limit the use of the campus as a cut-through for automobiles from any direction.[v]

e) Prohibit direct automobile access from North Haven and Glen Heights to the tract but encourage and develop non-motorized access.[vi]
f) Make the campus accessible to the existing public schools on High School Road and Seawell School Road.
g) Encourage neighborhood scale retail at Carolina North.
h) Ensure safe crossing of Airport Road for pedestrians and bicycles.

Goal 2B: Create a built environment with a sense of place and a feeling of permanence.

Strategies

a) Place along Airport Road, especially at the intersection with Estes Drive Extension, buildings that architecturally enhance the entranceway to Carolina North.[vii]
b) Develop distinguishable front facades that create a sense of orientation.
c) Relate the scale and design of street level frontage to the planned pedestrian-scale activity at the street level.
d) Coordinate building and architectural styles throughout the tract, using landscaping to create linkages throughout the site and to enhance connectivity.
e) Exercise special care in the location and design of any utility facilities such as water, sewer, and power generation due to the potentially large impacts that these activities pose to the surrounding community. Propose and communicate design, performance, environmental, and aesthetic standards to the Town Council before any plans are finalized.
f) Consolidate utility corridors and bury power lines, both those on-site and those which bring energy to the site.
g) Before any roads are accepted for ownership and maintenance by the towns, town-responsible professional engineers should certify that the roads are capable of sustaining long-term repeated use by mass-transit vehicles.

FISCAL EQUITY PRINCIPLE

Principle 1: The University or State or Carolina North tenants shall bear the cost of Town services required by Carolina North so that Town residents do not subsidize those uses through their local taxes. The Carolina North development shall be either revenue positive or revenue neutral for the Town.[viii]

Goal 1: The Town shall establish a process to identify the costs and the revenues associated with Carolina North and receive appropriate support from the University for Town services and resources.

Strategies

a) A process involving the Town and University should be established to develop a set of standards regarding natural resources and public facilities and our expected quality of life and then to monitor and evaluate the impacts of growth on those standards and look for alternatives for development when a saturation point has been reached.
b) The Town recommends UNC to explain its financial model to the Town and to articulate how the project will serve the needs of North Carolina citizens and to explain the impacts on Chapel Hill citizens.
c) A fiscal impact statement shall accompany every building or project at Carolina North. Any facility used for non-academic purposes should be subject to taxes or payment in lieu of taxes.
d) The report produced jointly by the Town and University in 1999 on fiscal equity shall be revised in light of the proposed development.
e) Establish a committee to develop the indicators and produce a report on fiscal equity. This committee shall be composed of citizens not affiliated with Town or University governance, though representatives of Town and University governance would serve as valuable resources to this group.
f) The Town shall take the opportunity offered by the zoning approval process to advance the goals identified by the Town's Horace Williams Citizens' Committee.

WATER AND SEWER / STORMWATER MANAGEMENT / AIR QUALITY PRINCIPLES

Principle 1: Assume a leadership position in sustainable water management and wastewater treatment and reuse.

Goal 1: Seek innovative solutions to minimize water demand and ensure adequate supply for the greater community as well as Carolina North.

Strategies

a) Collaborate with Orange Water and Sewer Authority in water and sewer planning. Address the impact of Carolina North on water supply and water and wastewater treatment infrastructure as the development is phased in.
b) A negotiated payment should be made in addition to the OWASA rate structure to account for capital improvements required to accommodate this development or some similar mechanism to mitigate increased subsidies by the general rate base.
c) Apply water conservation principles to all facilities.
d) Reuse treated wastewater.
e) Landscape to minimize need for pesticides and fertilizers.

Principle 2: Ensure that development of Carolina North results in no net increase in stormwater discharge.

Goal 2: Follow University Campus Master Plan Best Management Practices for stormwater.

Strategies

a) Use pervious pavement/sidewalks.
b) Use vegetative roofs.
c) Capture and reuse wastewater.
d) Control sediment and erosion during development to ensure no off-site impacts.
e) The University shall fund an erosion control and sedimentation inspection position with Orange County dedicated to Carolina North development.

Principle 3: Ensure that Carolina North has no negative impact on the air quality of Chapel Hill.

Goal 3: Ensure there is no net increase in greenhouse gases, nitrogen oxides and sulfur oxides.

Strategies

a) Use alternative energy sources; do not use coal and nuclear energy sources.
b) Put ozone action strategies in place.

c) Implement transportation demand management policies and encourage the use of public transit.
d) Provide priority parking for Alternative Fuel Vehicles.
e) Use low sulfur diesel construction and maintenance equipment and vehicles.
f) Ensure that construction equipment conforms to city noise levels.
g) Require the use of no or low VOC (Volatile Organic Compounds) paints, resins, coatings.
h) Ensure that buildings are Leadership in Energy and Environmental Design (LEED) certifiable. In the long term, ensure that buildings achieve platinum certification.
i) Apply sustainable green design principles.
j) Electric power be provided to the site in a way that is innocuous to the surrounding neighborhood and be fiscally neutral to Chapel Hill residents.

NATURAL AREAS / PARKS AND RECREATION FACILITIES PRINCIPLES

Principle 1: Preserve in perpetuity the maximum amount of open space possible with a goal of preserving 75% of the Horace Williams property as stated by the University.[ix]

Goal 1A: Protect water features and large areas of land.

Stategies

a) Preserve large portions of the Horace Williams Property for open space in the form of conservation easements.
b) Encourage construction on already cleared and graded land to preserve more of the existing natural area, while adhering to Neighborhood and Community Interface principles.[x]

Goal 1B: Designate and protect areas that serve as passive recreation opportunities, as wildlife habitat, and as buffers along Bolin Creek and Crow Branch.

Goal 1C: Build active recreation facilities within the developable area (25% of the Horace Williams property).[xi]

Principle 2: Develop and maintain a network of trails and greenways at Carolina North.[xii]

Goal 2A: Partner with Chapel Hill, Carrboro, Orange County and community groups to develop trails and greenways along the rail line, Bolin Creek and Crow Branch.

Goal 2B: Develop trails along the creeks in a sensitive manner to protect the fragile ecology of the corridor.

Principle 3: Conduct and maintain an inventory of natural resources and use it as a guide for planning and development.

Goal 3A: Implement the recommendation of the Carolina North Infrastructure Report (May 2003) to permanently protect designated environmental assets as follows:[vi]

> "Identify and delineate Carolina North's most valuable environmental assets that merit permanent protection. These assets include critical habitat, hardwood forests, steep slopes, streams, perennial and intermittent tributaries, stream buffers … and other riparian buffers. Preserve these assets by inviolable means, such as conservation easements or land trusts.
>
> "Identify other environmental assets that merit protection. These assets include green space, open space, tree stands and a specified protected acreage or percent.

Preserve these assets by means that are durable and allow the best future environmental decisions (e.g., Board of Trustees policy)." (Page 20)

Principle 4: Follow sustainable site design principles and goals.

Goal 4A: Endorse the following environmental principles and goals for conserving land and water resources specified in the 2/5/01 Town-Gown Committee Report:

a) Minimize disturbance.
   - Disturb as little of the proposed site as possible.
   - Work with the natural contours; avoid excessive earthmoving.
   - Limit removal of existing natural vegetation.
   - Avoid placing structures in floodplains and sensitive areas.
   - Keep building and parking envelope as compact as possible.
   - Maintain [or re-establish if needed] riparian buffer along stream [with additional allowance for wildlife corridors]

b) Maintain natural hydrologic cycle.
   - Prevent net increase in volume runoff.
   - Avoid unnecessary impervious surfaces—make pervious if possible.
   - Maintain recharge of rainfall to groundwater.
   - Provide retention beds to mitigate stormwater.
   - Maintain infiltration for existing vegetation.
   - Use "best management practices" such as porous pavement.
   - Collect rainwater for plant and garden watering.

c) Maintain water quality.
   - Use native species and omit future chemical site maintenance. [Landscape to minimize need for pesticides and fertilizers.]
   - Limit artificial areas such as maintained lawns.
   - Avoid discharge of wastewater to creeks and ponds.
   - Avoid earthwork which creates erosion and sediment problems.
   - Maintain native vegetation.
   - Use low maintenance, water quality Best Management Practices (BMP).

TRANSPORTATION AND LAND USE PRINCIPLES

Principle 1: Carolina North will create minimal impact on traffic and will promote commuter safety.

Goal 1A: Carolina North will be designed and built as a pedestrian-, bicycle-, and transit-oriented development from the outset.

Strategies

a) Strictly limit parking (for example 1 space for every 3 employees and/or a specified cap), and develop different parking limits for retail, residential, and institutional uses for this site. Ensure that Carolina North does not become a park-and-ride lot for the main campus.
b) Types of parking suggested include pervious pavement and parking structures under buildings in order to minimize impervious surfaces.
c) Park and ride lots using pervious pavement shall be established to the north, south, east and west of Chapel Hill and Carrboro to provide the bulk of the parking for non-residential Carolina North traffic. UNC shall bear their proportionate share of costs of building and maintaining park and ride lots.
d) Establish enhanced bus service on Airport Road and call for continued detailed technical study of options for a fixed-guideway transit corridor as an effective alternative to automobile use. Any use of the rail corridor shall be designed to protect the existing Cameron Avenue area neighborhoods. *[Two-thirds majority vote was not achieved on this strategy]*[xiii]
e) Support Triangle Transit Authority's efforts to develop regional mass transit serving Carolina North and ties into Chapel Hill Transit routes.
f) Concentrate uses in such a way as to support the 2025 DCHC (Durham/Chapel Hill/Carrboro Metropolitan Planning Organization) Transportation Plan.
g) Require off-site road sidewalk and bikeway improvements (not to include road widening) from Carolina North along Airport Road north to I-40 and south to US 15-501.
h) Sidewalks, natural paths and/or bikeways shall serve all buildings and be conducive to walking and biking.
i) Create direct routes for walking or biking through the entrances to the Carolina North campus.

A flourishing transit system and limited parking will support Carolina North as a transit-oriented development. Encourage the use of public transit by limiting parking but provide minimum adequate retail parking.

Goal 1B: Carolina North will be a mixed-use development.

Strategies

a) Create a mixture of affordable and market-priced housing.

b) Establish retail businesses that address the needs of the people at and in the vicinity of Carolina North, residents, students, faculty, employees and guests.
c) Design public recreation facilities to create a community focus.
d) Concentrate buildings within a small footprint designed for walkability.
e) Design Carolina North as a park-once environment for automobile users.
f) De-emphasize auto use by establishing a smaller ratio of parking spaces to square footage than that of the main campus.

Creation of a mixed-use development with the opportunity to live, work, and shop in the same vicinity is a key Comprehensive Plan strategy.

Principle 2: Carolina North will comply with the Town's Comprehensive Plan.

Goal 2A: Conserve and protect the Town's existing natural setting.

Strategies
a) Protect environmentally sensitive areas identified by the JJR study and establish a percentage of the overall acreage that will remain completely undeveloped in perpetuity, perhaps under a land trust or permanent deed restrictions.
b) Endorse the University's maximum footprint of 25% of the Horace Williams property and seek a firm commitment not to exceed that percentage.
c) Complete the bike and greenway system.

The implementation of these strategies will serve to protect and preserve open spaces and critical natural areas as specified by the Town's Comprehensive Plan.

Goal 2B: Protect the surrounding neighborhoods.

Strategies
a) Protect adjoining neighborhoods through the use of buffers, noise and height restrictions, building design, and vehicular traffic control.
b) Implement use of traffic calming devices in a manner that protects surrounding neighborhoods.
c) Provide a process for perimeter neighborhoods to apply for restricted on-street parking.

The Comprehensive Plan states that preservation of the physical and social fabric of Chapel Hill neighborhoods is key to maintaining the Town's community character.

Principle 3: Create a new zoning district that would apply to Carolina North.

Goal 3: Ensure that the development of Carolina North abides by the Town's Comprehensive Plan.

Strategies

This zoning category shall:

a) Delineate specific areas of Carolina North including 1) environmentally sensitive areas where development should be prohibited, 2) neighborhood and perimeter areas which should be limited to low-impact development and, 3) core areas where the denser mixed-use development should occur.
b) Establish permitted uses specific to the neighborhood and perimeter areas and to the areas for more intensive development.
c) Prohibit some uses in the neighborhood and perimeter areas that are allowed in the more densely developed areas.
d) For the identified more densely developable areas, implement a mixed-use concept, possibly adding an expedited review procedure. This mixed-use concept could be similar to that of the MU-V (Mixed Use – Village) zone.
e) Establish different processes for review, approval, and amendments of plans specific to each area in which development is permitted.
f) Require that modifications shall be individually specified and reviewed.

A new zoning district would protect the surrounding neighborhoods and the environment from the impact of Carolina North development while allowing growth necessary to the University.

COMMITTEE MEMBERS

John Boyer, Buck Branson, Joyce Brown, Margaret Brown, Al Burk, Joe Capowski, James Coley, Linda Convissor, Barbara Driscoll, Pat Evans, Cam Hill, Randy Kabrick, Kathleen Kearns, Mark Kleinschmidt, Julie McClintock, Margaret Morse, David Otto, Blair Pollock, Ruby Sinreich, Del Snow, Bill Strom, and Diane VandenBroek.

Comments

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[i] Vote was 9 to 3

[ii] Vote was 15 to 1. Al Burk prefers language stating "All hazardous waste sites on the Horace Williams property will be remediated before any construction begins" in order to better secure the safety of the surrounding neighborhoods, to allow the University to minimize disruption of environmentally sensitive areas through brownfields reclamation, and to facilitate obtaining the necessary clean-up funds.

[iii] Vote was 12 to 1

[iv] Vote was 10 to 3

[v] Vote was 10 to 2

[vi] Vote was 11 to 1

[vii] Vote was 10 to 2

[viii] Vote was 12 to 4

[ix] Vote was 11 to 5. Blair Pollock and Pat Evans commented that they support including greenswards like large lawns, soccer, football and baseball fields in the 75% open space area. Al Burk commented that he supports specific 25% development limits guaranteed with irrevocable conservation easements or land trusts to better secure the long term needs of surrounding neighborhoods and all of Chapel Hill's residents.

[x] Vote was 10 to 2

[xi] Vote was 11 to 4

[xii] The Committee voted 11 to 2 to delete the following draft goal due to redundancy: "Maintain the many miles of trails that already exist on the Horace Williams property." Diane VandenBroek's comment in support of keeping the goal in the report: the goal "recognizes the existing trails"

[vi] Vote was 14 to 1

[xiii] Vote was 7 to 5