

REPORT OF THE LEADERSHIP ADVISORY COMMITTEE FOR CAROLINA NORTH

January 19, 2007

INTRODUCTION

The Leadership Advisory Committee for Carolina North was charged by Chancellor James Moeser with issuing guiding principles for the development of Carolina North. He described Carolina North as necessary in light of the limited space still available on the existing campus, but asked for help in determining how it should be built. Chancellor Moeser asked for guidelines for a development that “will make us proud and support the fundamental mission of the University.” He added: “While Carolina North will provide room to grow, it has the potential of being a place of amazing discovery and innovation and a new model of sustainable community.” Chancellor Moeser suggested that the Committee focus on the issues of fiscal equity, housing, transportation and the environment.

The following report is intended to meet the Chancellor’s charge. The report is based on the discussion among members of the Committee between March 2006 and January 2007, including proposed statements of principles submitted by the Town of Chapel Hill (the report of the Horace Williams Citizens Committee), the Town of Carrboro, Orange County, the Chapel Hill-Carrboro Chamber of Commerce and the University of North Carolina at Chapel Hill. Those proposals are contained in a matrix that is attached to this report.

We strongly recommend all who are reading this report to review the attached matrix of principles. The principles incorporated in this summary provide a sampling of the depth and breadth of the entirety of the matrix. While there may be disagreement on particular matrix principles, they represent a collection of proposed principles submitted by local government, university, and community members who participated in the Leadership Advisory Committee. Only taken in their entirety can the concerns of all parties be taken into account and provide the most comprehensive guidance for Carolina North planning.

This report is organized as follows:

- I. General Principles
- II. Development Management
- III. Fiscal Equity
- IV. Environmental Principles
- V. Open Space, Natural Areas, Parks and Recreation
- VI. Housing, Schools, Commercial and other Uses
- VII. Transportation
- VIII. Conclusion
- IX. Appendices

I. GENERAL PRINCIPLES

Carolina North will create a campus for living and learning that is a model of ecological, social and economic sustainability. This model will strive to serve as a template that will have applicability for any community in North Carolina that seeks guidance for achieving a sustainable condition. To the extent that the Carolina North model is intended to have relevance to communities throughout North Carolina (and beyond), the model will contain the variety of land uses found in a typical community, i.e., general commercial, housing, civic and educational uses, in addition to the academic, research and partnership activities. This principle envisions the quest for sustainable land use as a primary academic, research and partnership mission at Carolina North. The planning for Carolina North should recognize that Carolina North is part of a larger ecological, social and economic community and that its development should be undertaken in light of its role in that community.

A sustainable community achieves fiscal equity and incorporates environmental consciousness, open space, natural areas, parks and recreation, diversified housing, schools, commercial areas, and offices supported by multi-modal transportation, master planned infrastructure and advanced technology. This principle was proposed by the Orange County delegation. As proposed, it contained reference to “support services for children and seniors” and added a parenthetical to the reference to offices stating “including living wage employment”. The University stated that it did not believe that such language should be included. Some members of the Committee wanted the language suggested by Orange County included and a sentence added indicating the University’s disagreement. The University would exclude the reference to children and seniors and to living wage employment and add a sentence indicating that some members of the Committee wanted those references included.

Carolina North will 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; and promote equity, human dignity and social justice.

Carolina North consists of related University or University sponsored projects, whether located on-site or off-site. The sustainability principles of energy and resource conservation apply to all aspects of Carolina North.

A process, apart from the municipal approval process, should be developed to insure continuing community conversations throughout the course of the development of Carolina North.

Development on the Carolina North campus 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.

Both the Towns and the University need to recognize that there could well be a point when the cumulative impacts of University and Town growth on our natural resources and our public facilities are such that no amount of mitigation would be possible and still retain the quality of life which both the citizens of the Town and the State of North Carolina expect from Chapel Hill and Carrboro. The University emphatically rejects this principle as it might affect the development approval process.

Carolina North will be developed in a way consistent with the Town of Chapel Hill's Comprehensive Plan and Carrboro's Land Use Ordinance.

Undisturbed natural systems have an inherent value that is recognized and respected. The University commits to never building in environmentally sensitive areas to be identified in the University's ecological assessment or by other studies by mutual agreement. The areas so identified in Carolina North should be permanently protected through an instrument involving a written agreement between the University and another entity. This principle does not preclude environmentally sensitive bicycle and pedestrian paths.

The retail and service components of Carolina North should be privately owned to the extent feasible and should be accessible to the entire community.

There is general agreement among the spectrum of Committee participants that many of the businesses incubated at Carolina North ideally would be retained within the community once they leave Carolina North, and that such efforts should be supported through communication, cooperative planning and assistance to the maximum extent possible.

II. DEVELOPMENT MANAGEMENT

The development of Carolina North shall be phased to achieve sustainability and concurrent adequate public facilities. Carolina North will be designed and built as a pedestrian, bicycle, and transit-oriented development from the outset. Transportation infrastructure will be provided consistent with the transportation principles set forth in this report and developed to minimize disruption and adverse impacts to the surrounding neighborhoods and communities. Retail, recreation, civic facilities and housing will be incorporated in each phase of development in such a way as to minimize disruption and adverse impacts to the surrounding neighborhoods and communities.

III. FISCAL EQUITY

The Carolina North campus will have a net neutral or positive fiscal impact on the Chapel Hill, Carrboro, and Orange County local governments. Reimbursements with regard to the cost of services will be guided by the fiscal impact study conducted on behalf of the University and the local governments.

IV. ENVIRONMENTAL PRINCIPLES

Carolina North presents a unique opportunity to meet the mission of the University of North Carolina at Chapel Hill while providing a model for environmentally sustainable community design reflecting reasonably anticipated environmental goals over the next 50 years. Carolina North will therefore be an example of sustainability in the sense that if the entire community of Chapel Hill and Carrboro adopted the design and operational practices embodied in Carolina North, this community would be environmentally sustainable.

Carolina North will assume a leadership position in sustainable water management and wastewater treatment and reuse by seeking innovative solutions to minimize water demand and ensure adequate supply for the greater community as well as for Carolina North.

Development of Carolina North will result in no net increase in stormwater discharge and no net increase in loading of sediment and nutrients into local streams. The stormwater requirements that were adopted for the main campus by the Town Council on July 2, 2001 will be adopted as the minimum standards for the development of Carolina North.

Carolina North will have no net negative impact on the air quality of the area. The University representatives stated their disagreement with this principle. The University commits to adopting energy and resource conservation in all aspects of Carolina North development, including building standards and choice of technologies. The technologies used will minimize disruption and adverse impacts to the surrounding neighborhoods and communities. The University commits that any industrial use, including power generation, will address health, safety and welfare impacts on the community.

Any commercial or industrial entity at Carolina North will adhere to the same environmental principles committed to by the University.

V. OPEN SPACE, NATURAL AREAS, PARKS AND RECREATION

Over the next 50 years, the University will develop its building needs on 250 acres of Carolina North. It will commit not to develop on the remaining acreage during that 50 year period. The University will in good faith consider strategies that will allow its development needs to be accommodated on the 250 acres beyond 50 years. The local governments believe that after 50 years the University should renew and extend this commitment in perpetuity.

Building height should be minimized where the height of buildings may have an adverse effect on existing neighborhoods. Building height should be appropriately taller in other sections of Carolina North so as to reduce the developed footprint and increase open space.

The development should designate and protect areas that serve as low impact recreation opportunities, as wildlife habitat, and as buffers along Bolin Creek and Crow Branch.

Carolina North should have amenities that are open and welcoming to the general public. Examples of amenities that may be included are parks, performance space, trails and greenways.

The University should partner with local government and groups to develop trails and greenways. Trails along creeks should be developed in a sensitive manner to protect fragile ecology.

Establish as much of the open space as possible as contiguous areas. Provide “non-fragmented” areas to maintain wildlife and a sense of forest and greenspace. Protect as much of the natural environment as possible.

Build active recreation facilities within the developable area (250 acres of the Carolina North property).

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

VI. HOUSING, SCHOOLS, COMMERCIAL AND OTHER USES

Carolina North should create a livable community of University-related, compatible uses that integrate living, working, recreation and shopping areas, both horizontally around the site and vertically within buildings.

All local governmental entities have adopted the Schools Adequate Public Facilities Ordinance (SAPFO) in order to pace growth with the construction of schools. SAPFO will apply to the development of housing on Carolina North (except for dormitory housing and housing for the elderly).

The University will provide school sites for First School and for an additional school. Community members would add a principle that Carolina North would accommodate the additional demand for pre-Kindergarten through high school education as a result of the development. The University disagrees with the addition of this second sentence.

Local construction and operational costs of K-12 public education are met through a variety of taxes, including sales and property taxes and impact fees. Carolina North will provide that taxes or payments in lieu of taxes will be paid so that revenue for public education is either revenue positive or revenue neutral for Orange County and the public schools. The University has not agreed to the language of this second sentence.

The University will address the childcare needs created by Carolina North. This could include the provision of sufficient childcare subsidies, location of space for future childcare facilities and/or the construction of said facilities.

Carolina North will 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. Bicycle and pedestrian connectivity are encouraged.

There was a lengthy and fruitful discussion of the housing issue. Although there was agreement with regard to general considerations, there was no agreement as to specifics. Three different sets of principles reflect that discussion, as follows:

1. The following principles with regard to housing were submitted on behalf of the University:

a) Housing at Carolina North can contribute to the University's efforts to attract faculty and staff employees, as well as graduate students and post-doctoral fellows, to the University and also can help those who are already here to find housing close to campus. Consequently the primary purpose of providing housing at Carolina North will be to further the mission of the University of North Carolina at Chapel Hill.

b) We envision the residential component of Carolina North as a mixed-income community. Housing built at Carolina North should be accessible for a range of incomes, from those who would qualify for affordable housing to those who are able to pay market rates. The University will make good faith efforts to make a positive contribution to the availability of affordable housing in the community. The University commits to study these issues and also to provide or require a mix of housing values in each stage of development. Specifically, some of the housing

at Carolina North will be affordable to full-time UNC employees in the University's lowest pay grades.

c) The housing planned for Carolina North must be financially feasible and financially sustainable. Although the University will likely retain ownership of the land, the University anticipates that a significant portion of the housing will be privately developed, thus adding values to local tax rolls. On that premise, the housing must provide opportunities for a reasonable return to prospective developers. The University will pursue the possibility of using low-income housing tax credits and other programs of this nature to help provide housing.

d) To the extent that University employees (or employees of the UNC Health Care System) reside at Carolina North, they would be able to commute to work via walking, bike, or transit. Similarly, to the extent that University or health care system employees reside anywhere in the region that has ready access to transit-based commuting, reliance on single-occupant vehicles would be reduced. An employee's place of residence cannot be dictated, but the University can and will commit to provide housing at Carolina North, subject to market acceptance, so that University and health care system employees who are attracted to this residential life style will have reasonable opportunities to select it.

e) While the LAC reached no consensus about the amount of housing to be provided at Carolina North, the University will develop Carolina North in such a way that early phases of development do not preclude the possibility of building large amounts of housing in later phases, if the University should see that as a desirable goal.

2. The following principles with regard to housing were submitted on behalf of the Town of Carrboro:

a) Dwelling units will be built at Carolina North in numbers equal to the number of new households that will be attracted to the area by the jobs created at Carolina North, in order to support the following goals:

i) to further the mission of Carolina North to be a model of ecologically, economically & socially sustainable community;

ii) to avoid exacerbating the crisis in housing affordability already existing in the Chapel Hill/Carrboro area;

iii) to enable University & UNC Health Care System employees to walk or bike to work or commute by transit, thus reducing traffic, consumption of non-renewable fuels, and climate & air quality impacts of intense urban activity on the campus;

iv) to enable the University to attract faculty and staff employees, graduate students and post-doctoral fellows, as well as to enable those who are already here to find housing closer to campus.

b) This ratio of dwelling units to "new households attracted" will be maintained as each phase Carolina North is built, so that, for instance, if Carolina North Phase One will attract 2000 new households to the area, then Phase One will include 2000 dwelling units.

c) Non-undergraduate housing created by the University in other parts of the Chapel Hill Transit service area may be counted toward the accomplishment of housing goal.

d) The residential component of Carolina North will be a mixed-income community comprised of housing accessible for a range of incomes, from those who would qualify for affordable housing to those who are able to pay market rates. The University commits to provide this mix of housing values in each phase of development. Specifically, some of the housing at Carolina North will be affordable to full-time UNC employees in the University's lowest pay grades.

e) The housing planned for Carolina North must be financially feasible and financially sustainable. Although the University will likely retain ownership of the land, the University anticipates that a significant portion of the housing will be privately developed, thus adding values to local tax rolls. On that premise, the housing must provide opportunities for a reasonable return to prospective developers. The University will pursue the possibility of using low-income housing tax credits and other programs of this nature to help provide housing.

f) While an employee's preferred place of residence cannot be dictated or predicted, the University will commit to create housing and a residential life style at Carolina North that will be competitively attractive to University and Health Care System employees who have reasonable opportunities to select it.

g) A portion of the housing may be made available to the secondary workforce generated by Carolina North, in order to ensure that newly built housing can be sold or rented in a timely fashion.

3. The following principles with regard to housing, contained in the Report of the Horace Williams Citizens Committee, were submitted on behalf of the Town of Chapel Hill:

a) Planning for Carolina North shall address community needs for housing, schools, and other facilities.

b) Create a diversity of housing levels, types and values that reflect the range of salaries at the University.

c) Provide a minimum of 25 % of housing units calculated based on the total daytime population (employees and students) at Carolina North; the 25 % also needs to reflect the range of salaries.

VII. TRANSPORTATION

The default principle for transportation to, from and within Carolina North is to rely on public transportation.

Planning for Carolina North should have the goal of modifying behavior so as to encourage the use of public transportation.

Each phase of the development of Carolina North should have a balance of University buildings, housing and other features so as to discourage single passenger automobile trips.

Each phase should be built in a way that encourages use of existing and foreseeable opportunities for public transportation.

The design for final development should be one that encourages and provides incentives for the use of public transportation. Transportation corridors and land needed for facilities such as park and ride lots should be identified and preserved at the earliest possible planning stage. Transportation impacts will be experienced through Orange County and adjacent communities.

Planning and decisions with regard to new roads or modifications of existing roads should be based upon the transit study to be carried out on behalf of the transit partners, the towns of Chapel Hill and Carrboro and the University, the 2030 and 2035 area transportation plans, and the principles set forth in this report.

Any changes proposed by the University in roads or road configuration will be proposed only after full consideration of the availability and feasibility of public transportation serving the needs of persons working and/or living at Carolina North.

Design for Carolina North should encourage safe pedestrian access to and within the development and should enable safe use of bicycles by any person working at or visiting the development. There should be ease of access by pedestrians and bicyclists between Carolina North and near-by communities.

The University will actively advocate for improvement in regional transportation.

Carolina North will create minimal impact on traffic and will promote commuter safety. The Transportation Plan will be developed around a transit system including use of Chapel Hill Transit rather than single occupancy motor vehicles. Carolina North will be designed and built as a pedestrian, bicycle, and transit-oriented development from the outset and the Transit Plan will be the guide to accomplish this.

VIII. CONCLUSION

This report is submitted on behalf of the Leadership Advisory Committee for Carolina North.

Respectfully submitted,

Kenneth S. Broun
Chair

IX. APPENDICES

List of Committee members and alternates

Chancellor's charge to the Committee

Matrix of Principles

Facilitator's Reports

Records of the meetings