



RESPONSE TO RFP

**NEIGHBORHOOD  
CONSERVATION  
DISTRICT:**

**MASON FARM /  
WHITEHEAD CIRCLE**

Town of Chapel Hill

*Submitted by:*

**Clarion Associates**

*In association with:*

**David Swanson, Landscape Architect**

*Contact Information:*

Roger S. Waldon, FAICP

Clarion Associates

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June 15, 2006



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*Planning and Zoning  
Growth Management  
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Real Estate Consulting  
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C L A R I O N

June 15, 2006

Ms. Coco Hall  
Purchasing and Contracts Manager  
Town of Chapel Hill  
405 Martin Luther King Jr. Boulevard  
Chapel Hill, NC 27514

Re: RFP: Neighborhood Conservation District, Mason Farm/Whitehead Circle

Dear Ms. Hall:

Clarion Associates is pleased to submit this response to your Request for Proposals related to the Town's initiative to develop a Neighborhood Conservation District for the Mason Farm/Whitehead Circle neighborhood. Clarion Associates, LLC, is a national land-use consulting firm with extensive experience in preparing area plans, design standards, comprehensive plans, growth management strategies, and zoning codes for jurisdictions of all sizes and types in North Carolina and across the country. We have offices in Chapel Hill, Denver, Fort Collins, and affiliate offices in Cincinnati, Chicago, and Philadelphia.

We are aware of the importance of neighborhood conservation in Chapel Hill, and also of the issues facing this neighborhood. Prior to my joining Clarion Associates, I served as Planning Director in Chapel Hill with responsibilities for preparing and administering the Town's Comprehensive Plan and Land Use Management Ordinance. We know that the Mason Farm/Whitehead Circle neighborhood is identified as a Residential Conservation Area in the Town's Comprehensive Plan. We are aware of the impact created by the nearby presence of the University, most recently and notably with University construction of family housing along the north side of Mason Farm Road. And we have been following the influence of market forces that has resulted in new construction proposals out of character with the traditional form of this historic neighborhood.

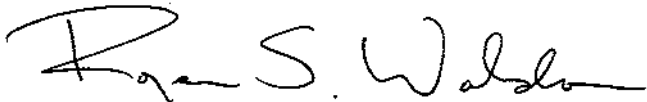
We recently completed work, on behalf of the Town of Chapel Hill, to create three new Neighborhood Conservation Districts (adopted by the Town Council on June 12.) In developing these districts, we used citizen engagement techniques that proved successful, combined with knowledge of the Comprehensive Plan, Land Use Management Ordinance, and ideas brought from other communities. We also worked on a fourth District Plan, which was completed but not yet adopted due to internal neighborhood disagreements. That experience reinforced our core belief that resident buy-in, from beginning to end of such an initiative, is critical. We remain hopeful that this remaining proposed district will also be adopted in the future, following additional internal neighborhood discussions.

The Request for Proposals lists specific requirements for submittals, and suggests that the numbering system in that list be used to organize submittals. We have structured our proposal accordingly. Item 3, which is particularly critical: "A description of the proposed process and methodology to be utilized to complete the project, including neighborhood participation." This section is the foundation of our proposal, and we particularly call your attention to it.

Finally, we offer a comment on the recent petition brought to the Town Council on June 12 by the Chapel Hill Planning Board, offering ideas on the process for creating Neighborhood Conservation Districts. We believe, based on our experience, that the Planning Board's suggestions are well grounded and constructive, and have built our proposed work program and schedule in a manner that incorporates the Board's suggestions. The Town Council is to consider the Board's ideas on June 26; if the Council decides on a process other than that recommended by the Planning Board, we would be pleased to amend our work plan accordingly.

Thank you for your consideration of this proposal. We believe that the concept of Neighborhood Conservation Districts is valuable and important, and have seen the benefits that can result. We look forward to the opportunity to work with the Mason Farm/Whitehead Circle neighborhood. We believe that our team of professionals is an excellent fit for the tasks that need to be completed, and a good match for the Town of Chapel Hill.

Sincerely,

A handwritten signature in black ink that reads "Roger S. Waldon". The signature is written in a cursive style with a large, stylized initial "R".

Roger Waldon  
Senior Consultant

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# 1. OVERVIEW OF CLARION ASSOCIATES

Clarion Associates is a full-service, nationally recognized land use, growth management, and planning consulting firm with offices in Chapel Hill, Denver and Fort Collins and affiliate offices in Chicago, Cincinnati, and Philadelphia.

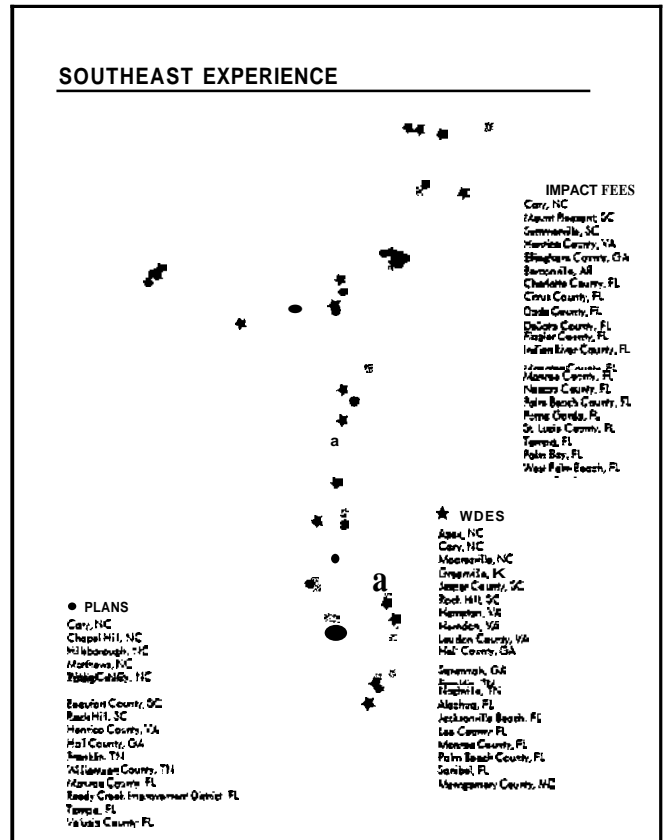
Clarion Associates has a unique and unmatched combination of talent that covers the fields of land use and urban planning, design, code preparation, and land use law. This combination allows us to develop creative solutions to difficult land use and design challenges. Clarion Associates has represented both private and public sector clients on a variety of land-use planning and zoning matters. Its principals have written plans and drafted ordinances, regulations and design standards throughout the United States.

The firm has developed expertise in a broad range of planning areas, including:

- Neighborhood Plans and Design Standards;
- Zoning and other implementation approaches;
- Historic preservation regulations;
- Community and regional planning;
- Development financing;
- Downtown plans and strategies; and
- Citizen participation strategies.

Roger Waldon, Senior Consultant with Clarion Associates and former Planning Director for the Town of Chapel Hill, will serve as Project Manager for this initiative, and will serve as primary contact for the project and for contract negotiations. His contact information follows:

Roger S. Waldon, FACIP  
 Senior Consultant, Clarion Associates  
 1526 E. Franklin Street, Suite 102  
 Chapel Hill, NC 27514  
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Clarion Associates, LLC was formed in 1995. It is a Limited Liability Corporation owned by a partnership made up of four individuals. There currently are 17 employees in the firm, located in three offices: Chapel Hill, Fort Collins, Colorado, and the headquarters office in Denver. There are affiliate offices in Cincinnati, Philadelphia, and Chicago.

## 2. EXPERIENCE WITH SIMILAR ASSIGNMENTS

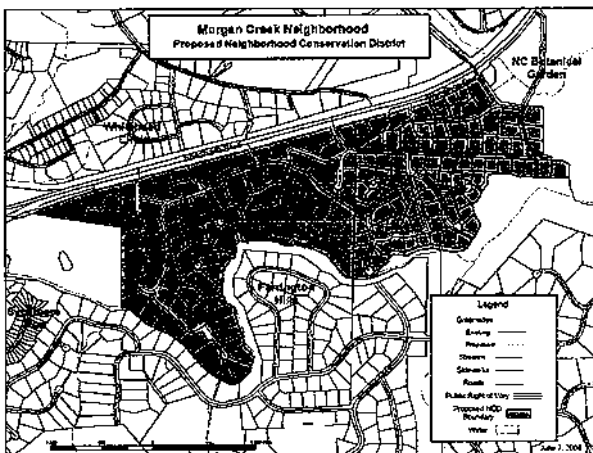
Clarion Associates has a broad range of experience in preparing small area plans and designing community preservation strategies. Notable in the context of this Mason Farm/Whitehead Circle initiative is the recent completion of Clarion's work in preparing three similar Neighborhood Conservation Districts in Chapel Hill. Adopted by the Town Council on Monday, June 12, 2006, these three districts were established following groundwork analysis, collaboration with Town Staff, and extensive neighborhood and property owner participation. Staff assigned to the Mason Farm/Whitehead Circle project will be the same staff members who worked on the previous three NCD initiatives for Chapel Hill:



Roger Waldon, former Chapel Hill Planning Director, and Associate Leigh Anne McDonald, a planner with extensive GIS experience. A summary of these three initiatives follows:

### Kings Mill / Morgan Creek

This neighborhood is near the Mason Farm/Whitehead Circle neighborhood, separated by Fordham Boulevard. Concerns focused on pressures for re-use of traditionally owner-occupied dwellings based upon proximity to the university,



preservation of visual character, and sizes of structures. The approach to creating a Neighborhood Conservation District involved extensive community contact: one-on-one meetings, community meetings, telephone conversations and email correspondence. Concerns about existing issues and the future of the neighborhood were brought out, and a range of possible responses discussed. Possible responses included both regulatory and non-regulatory measures. A new overlay zoning district was established specifying minimum lot

sizes and setbacks, limits set on the size of new structures (including additions to existing structures), limitations on front-yard parking, adjusted restrictions on fencing, and relaxed rules to permit accessory apartments within dwellings.



### Greenwood Road

This historic neighborhood is down the road from the University. Concerns focused again on pressures for re-use of traditionally owner-occupied dwellings based upon proximity to the university, preservation of visual character, and sizes of structures. An additional concern was a set of expired restrictive covenants that were not enforceable, and the lack of an internal neighborhood structure for information and communication. The approach to creating a Neighborhood Conservation District involved extensive community contact in the same manner as the Kings Mill/Morgan Creek initiative, focusing on a series of community meetings. Concerns about existing issues and the future of the neighborhood were similar to the Morgan Creek issues, but exacerbated by absence of enforceable restrictive covenants. A new overlay zoning district was established specifying minimum lot sizes and setbacks, limits set on the size of new structures (including additions to existing structures), limitations on front-yard parking, adjusted restrictions on fencing, and relaxed rules to permit accessory apartments within dwellings. Special attention was focused on the lots within this neighborhood that front on Fordham Boulevard, and the need to allow visual and noise barriers to be constructed. A related initiative that was sparked by these discussions was the creation of a local Homeowners' Association.



### Pine Knolls

This diverse neighborhood is a mix of owner and renter, single-family and multi-family housing, a traditional family-oriented collection of streets near the University that increasingly over the years provided opportunities for student rental housing. Residents welcomed the presence of students, but expressed concern that the neighborhood was in danger of transformation to an exclusively student-oriented area with diminished opportunities for traditional families. Concerns focused on trends to build larger units for rental purposes, and trends to build duplexes. The approach to citizen involvement was uniquely customized for this neighborhood to include door-to-door visits and information handouts, in addition to community meetings. Existing neighborhood organizations were brought on as partners in the initiative, along with the Chapel Hill-Carrboro School Board. A new overlay zoning district was established specifying maximum sizes for structures, prohibiting construction of new duplexes, limiting building height, tightening front-yard parking restrictions, and requiring notices to nearby property owners when new development or expansions of existing development are planned.



A fourth neighborhood was also engaged as part of this process. The Coker Hills neighborhood initiated a process to create a district, and extensive community and individual discussion followed. A series of issues emerged for which the neighborhood could not reach consensus, and a decision was made in this case to not establish a Neighborhood Conservation District, pending further internal neighborhood discussions. That experience reinforced our core belief that resident buy-in, from beginning to end of such an initiative, is critical. We remain hopeful that this fourth district will also be adopted in the future, following these additional internal neighborhood discussions.

### **3. PROPOSED PROCESS AND METHODOLOGY**

We have just completed the process of working with these four neighborhoods in Chapel Hill, described above. At the request of the Town Council, we pursued a process that was designed to complete work in four neighborhoods simultaneously over a period of approximately six months. For three of the neighborhoods, a successful conclusion resulted. For the fourth neighborhood, it was clear that extended discussion and a longer time period was needed.

We are also aware (through Roger Waldon's work as Planning Director) of the process followed in creation of Chapel Hill's first Neighborhood Conservation District in Northside. For that neighborhood, a local committee was appointed by the Town Council made up of residents, property owners, and others. Preparation of that district took 18 months from start to finish. The Chapel Hill Planning Board recently submitted a report to the Town Council (on June 12, 2006), suggesting that this type of longer process using a local committee is desirable. We agree that, if circumstances allow, this longer process with a Council-appointed committee is a good way to proceed.

The Town Council has not yet commented on the Planning Board's report, but we believe that there are good ideas there that need to be incorporated in the next Neighborhood Conservation District initiative. Accordingly, we propose a process and methodology here that track the Planning Board's ideas closely. If the Council decides, upon discussion of the Planning Board's suggestions on June 26, 2006 that an alternate approach is preferable, we would be happy to adjust our proposed process to reflect the Town Council's direction.

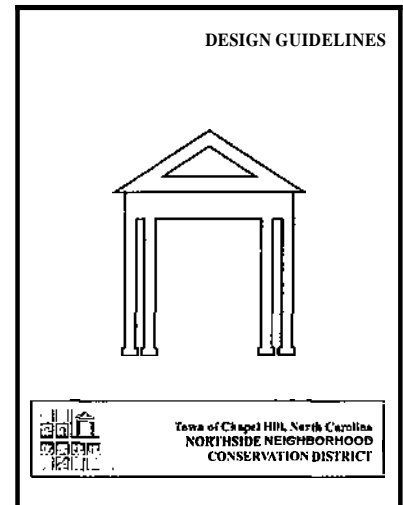
In addition, for this neighborhood, special attention is needed to communication with the University. The recent construction of University Family Housing along the north side of Mason Farm Road has had significant impacts on the Mason Farm/Whitehead Circle neighborhood, both in terms of traffic and visual character issues. Continuing dialogue about pedestrian and vehicle movements and connectivity is in order, along with communication regarding future University plans for the area.



We propose the following general approach for the Mason Farm/Whitehead Circle initiative:

1. Boundary, Objectives, and Process: The consultant, in collaboration with staff and with the neighborhood leaders who brought the original Mason Farm/Whitehead Circle petition to the Town, will prepare three initial documents for the Council's consideration: A proposed boundary for the new district (to be presented, discussed, and possibly adjusted as part of the process); a set of objectives to be addressed in the initiative (which could subsequently be expanded, based on neighborhood discussions); and a proposed committee structure for the Council to use in appointing a Steering Committee.
2. Recruiting/Appointing Committee Members: The Town Council, through the Town Manager and Clerk's offices, would invite citizens to apply for membership on a Steering Committee. The structure and membership of the committee (number of residents, property owners, Planning Board representatives, other interests, etc.) would be established in Task 1. Following the Town's typical processes, the Town Council would make appointments to a Steering Committee.
3. Initial Information Packet: The consultant, in collaboration with staff and the Steering Committee, would distribute an information packet to every resident and property owner within the proposed district boundary. The Packet would contain: General information about Neighborhood Conservation Districts (what they can and cannot accomplish); Explanation of the process; the Council's stated objectives for the district; A booklet explaining dimensions and planning terminology; Website information; and a schedule of planned Steering Committee and Neighborhood meetings.
4. Neighborhood Meetings and Steering Committee Meetings: Initial meetings would be informational, along with opportunities for citizens to offer opinions and concerns. Possible topics to be covered include land use, design standards, viewsheds, dimensional regulations, visual character, and other topics as identified by the Steering Committee.
5. Review of Experiences from Other Communities: Consultant will prepare a discussion paper that reviews the approaches and experiences of other communities which have undertaken similar neighborhood initiatives. This information will be presented to the Steering Committee, Planning Board, and Town Council.
6. Website: Town staff will post materials on the Town's website, including a Frequently Asked Questions sheet, definitions, maps, a printer-friendly information booklet, and information about other Neighborhood Conservation Districts in Chapel Hill.

7. Status Reports to Planning Board and Town Council: Consultant, staff, and Planning Board representatives on the Steering Committee will periodically provide status reports to the Planning Board and Town Council as discussions proceed.
8. Develop a Plan: Following a series of Steering Committee and Neighborhood meetings, consultant will prepare a draft plan for a Mason Farm/Whitehead Circle Neighborhood Conservation District, along with a map. These materials will be presented and discussed at Steering Committee and Neighborhood Meetings.
9. Steering Committee Recommendation: At the conclusion of discussions, the Steering Committee shall vote on a plan and map to recommend for consideration by the Planning Board and Town Council.
10. Final Action: Following presentation to and recommendation by the Planning Board, the Town Council will conduct a public hearing to consider citizen comments on the proposed plan and map. Following the public hearing, the Council will consider action to enact the new district.
11. Design Guidelines: We recommend that Design Guidelines be prepared following adoption of a plan, to illustrate the concepts of the plan and focus specifically on design issues in the Mason Farm/Whitehead Circle neighborhood.



## 4. WORKING WITH RESIDENTS AND PROPERTY OWNERS



The citizen engagement portion of this process is the foundation of the initiative. Two-way information exchange is critical. Consultant will prepare periodic newsletters, meeting summaries, notices, and proposals to be sent to all property owners and all residents. Materials will be posted on the Town's website, and requests will be made to local media outlets (Chapel Hill Herald, Chapel Hill News, Raleigh News and Observer, Daily Tar Heel, The Independent, and WCHL) requesting help in disseminating information. In order to maximize opportunity for opinions and feedback returning from citizens, consultant will be available for one-on-one interviews and telephone calls, along with standard email correspondence. If the Steering Committee finds it desirable, a survey will be prepared and distributed to encourage additional comment and opinion. Our experience with other neighborhood plans is that citizens are eager to be involved and to offer opinions, and we will provide multiple venues for participation.

## 5. SERVICES UNWILLING TO PERFORM

There are no services outlined in the Request for Proposal that Clarion Associates is unwilling to perform.

## 6. TIMELINE

If a decision is made to select a consultant on June 26, 2006, as suggested in the Request for Proposals, the timing will be good for a series of public meetings in the fall. As always in Chapel Hill, it is advisable to avoid major meetings in July and August, so this time can be used for finalizing a scope of work and schedule, and beginning the process of recruiting for a Steering Committee. We propose the following, and would be happy to discuss adjustments to this proposed schedule:

1. Summer, 2006: Project initiation and preliminary discussions with Planning Board and citizens who brought the initial petition to the Town Council; preparation of initial materials.
2. September, 2006: Town Council to appoint Steering Committee.
3. October – November, 2006: Initial Steering Committee meetings, along with distribution of information packet to residents and property owners.
4. January, 2007: First major Neighborhood Meeting.
5. February – June, 2007: Series of Steering Committee and Neighborhood meetings to discuss issues and prepare plan, with periodic updates to the Planning Board and Town Council.
6. July-August, 2007: Plan, ordinance, map, and Design Guidelines prepared and distributed.
7. September, 2007: Council action on proposed Mason Farm/Whitehead Circle Neighborhood Conservation District.

## 7. PROPOSED FEE SCHEDULE

Clarion Associates proposed to undertake this work within a not-to-exceed budget of \$25,000. This figure includes all expenses, including copying and mailing. Components of this proposed budget are as follows:

- Project Initiation (summer, 2006): \$ 1,000
- Initial Meetings with Steering Committee (fall, 2006): \$2,000
- Public Dialogue, Preparation of Plan (January-June, 2007): \$15,000
- Preparation of final documents, including Design Guidelines (summer, 2007): \$5,000
- Presentation of Materials for Action, including Revisions (September, 2007): \$2,000

## 8. REFERENCES

We offer the following information for clients who can comment on the quality of Clarion's work. The Town of Chapel Hill has permission to contact these individuals:

Town of Chapel Hill, NC: Preparation of Neighborhood Conservation Districts. Contact: Planning Director J.B. Culpepper: (919) 968-2728. Services provided fall 2005 - June, 2006.

Town of Matthews, NC: Preparation of a Sector Plan surrounding a community college campus. Contact: Planning Director Kathi Ingrish: (704) 847-4411. Services provided April – October, 2005.

Town of Emerald Isle, NC: Preparation of Design Concepts for two specific areas subject to possible redevelopment. Contact: Planning Director Kevin Reed: (252) 354-3338. Services provided May – June, 2006.

## 9. CONTRACTS TERMINATED PRIOR TO COMPLETION

There have been no Clarion contracts that were terminated prior to completion of work.