

Commissioners,

We'd like to thank you for the time and attention you are investing in your study of Habitat for Humanity's "Sunrise Rd." Concept Plan.

Much of the discussion at our first meeting touched on two general types of questions: those concerning definitions of the nature and character of the site, including its zoning status, and those regarding evaluation of the function and purpose of the design, especially in regards to satisfying the 17 points of guidelines provide by The Mayor's Committee.

In order to facilitate (and expedite) our next meeting and allow for as much time as possible for comments from your Commission, we are providing as a resource the attached summary of information. Our summary includes the following four sections: First, a description of the character of the property, including a summary of the property's existing regulatory status, and also a review of the property's physical site constraints. Second, we provide a series of graphical representations of the site constraints as described in the first section. (A review of these graphics, we believe, best demonstrates how the design responds to the identified constraints and opportunities on the site.) Third, we review in what ways the design is intended to directly and specifically address the 17 priorities outlined in the Mayor's Committee report. Lastly, we close with a brief update on the direction of on-going work on our proposal.

## **I. PROPERTY CHARACTERISTICS:**

### **--REGULATORY STATUS --**

- **Urban Services** • The Habitat For Humanity property is located within the Chapel Hill Urban Services Boundary, south of I-40 and east of Sunrise Road. Inside this boundary development intensities are to be "urban" and will be supported by municipal services including public water and sanitary sewer service provided by OWASA.
- **Land Use Intensity** • The Habitat For Humanity property is designated as "Low Residential 1-4 dwelling units per acre." A survey of the Town's adopted Land Use Plan shows that all the abutting property as well as neighboring areas such as Chandlers Green are also designated for "Low Residential, 1-4 units /ac."

Carol Woods, located west of Sunrise Road and south of I-40, and its neighboring properties are designated "Medium Residential, 4-8 units /ac." on the Chapel Hill Land Use Plan.

- Density of Habitat Proposal • The Habitat For Humanity proposal is for 50 homes on 17.2 acres or a density of 2.9 dwelling units per acre. R-2 zoning would permit a maximum of 68 dwellings.

--SITE CONSTRAINTS--

The Habitat for Humanity property includes the following physical design constraints:

- The western part of the property is crossed by a stream originating from a spring at the most southwestern tip of the property. The Town of Chapel Hill has determined that this is a perennial stream. The corresponding RCD buffer applies.
- A man-made ditch-line exists in a small draw in the eastern part of the property, originating in proximity to the green houses on the "Potted Plant" property to the south. The Town of Chapel Hill has determined that this feature does not classify as a perennial or intermittent stream. Other professionals on site (the representative from the Army Corp of Engineers, and a private biologist reviewing wetlands) verbally confirmed that this feature is not classifiable as a stream by standards known to them.
- The site contains certain wetland areas, as determined by inspection by the Army Corp of Engineers. A jurisdictional wetland (one which meets the Army Corp of Engineers standard for regulation) exists in the south western portion of the property, in proximity to the perennial stream and its buffer area. An additional small (less than 1/10<sup>th</sup> acre) wetland area exists on the southern boundary of the property in proximity to the greenhouses on the "Potted Plant" property. Current regulations make no distinction as to the regulatory status of man made vs. natural wetland areas, however this wetlands feature is classified as "isolated" and is NOT a regulated wetland, regardless of its source.
- The western end of the property is traversed diagonally by a 68' wide Duke Power easement containing overhead transmission lines. Buildings are not permitted in the easement. Improvements, such as roads, parking areas and utilities are permitted when employing appropriate design standards.
- The north eastern tip of the property abuts the Interstate-40 right-of-way. Town ordinances require a 100' "Greenway" at the boundary of the right-of-way.

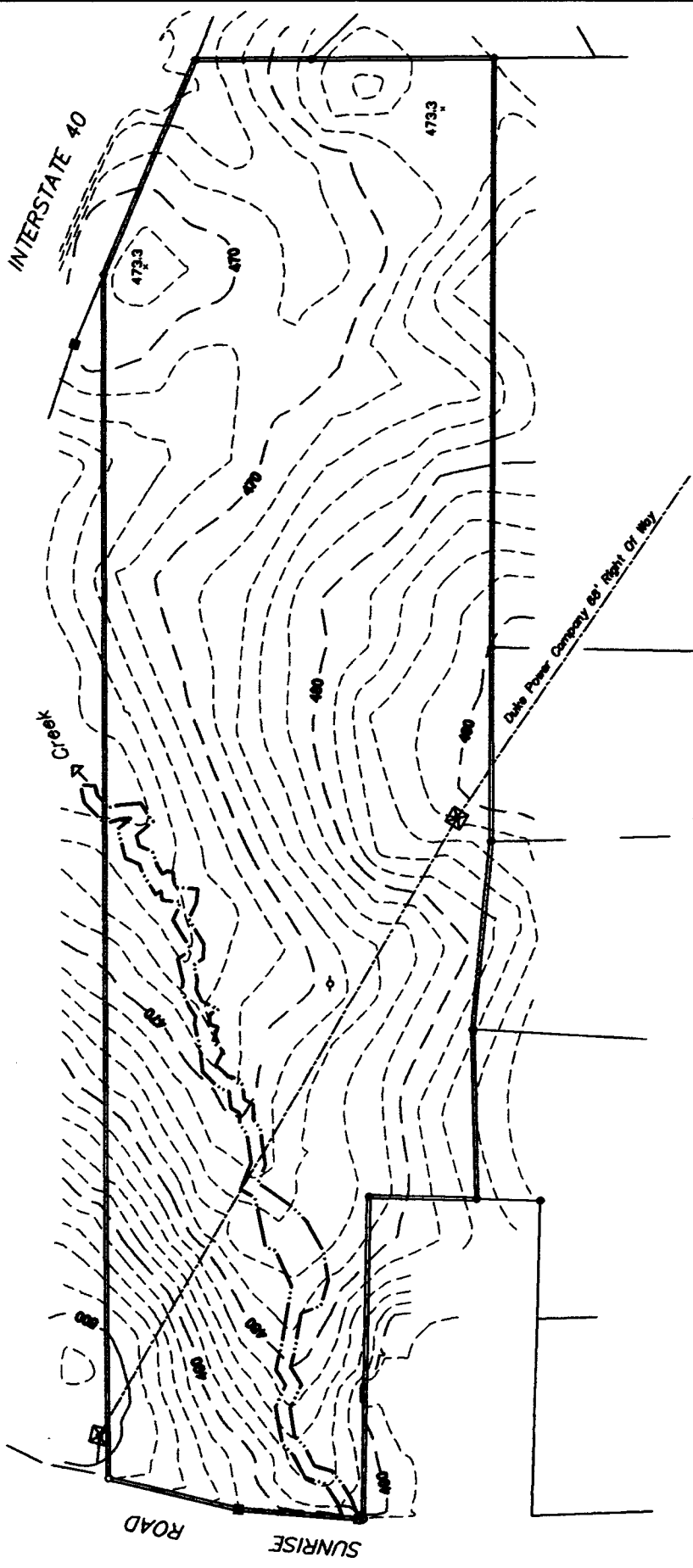
- There are no “steep slopes” (> 25%) on the property. Slopes nominally greater than 10% exist in pockets, the largest being at the northwest corner of the property.
- The only existing road access to the property is at the western boundary along Sunrise Rd. A preliminary site visit by a DOT engineer yielded an assessment that the engineering of an entrance at this location will need to account for the features and topography of the existing road, but that adequate space/distances exist for these needs. Current practice of the Town of Chapel Hill is to hire (at applicant’s expense) a traffic engineer of its own choosing.

It is as a result of these constraints, that the eastern half of the site is the portion on which development is proposed.

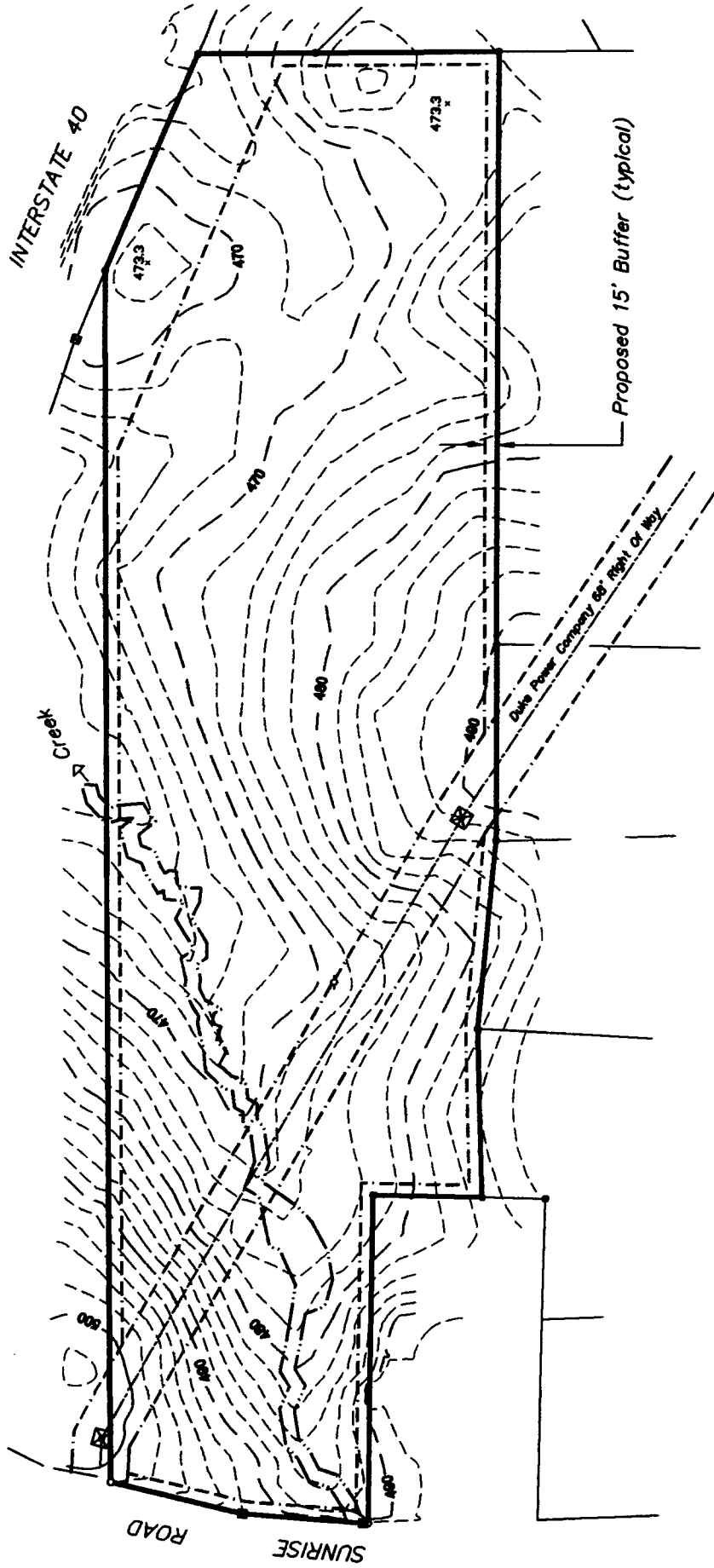
## **II. GRAPHICS**

(attached)



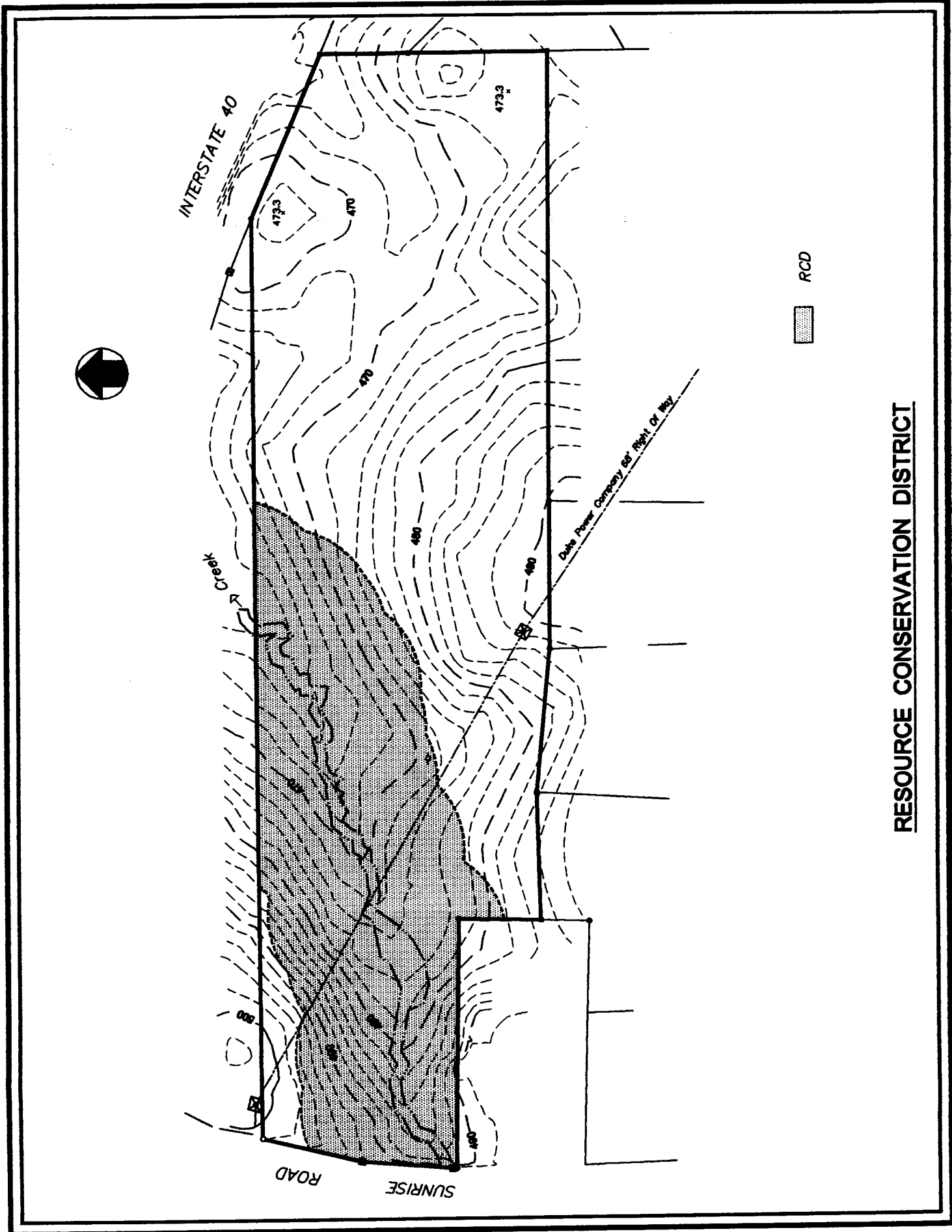


TOPOGRAPHY



--- Easements and Buffers

### EASEMENTS AND BUFFERS



RESOURCE CONSERVATION DISTRICT



INTERSTATE 40

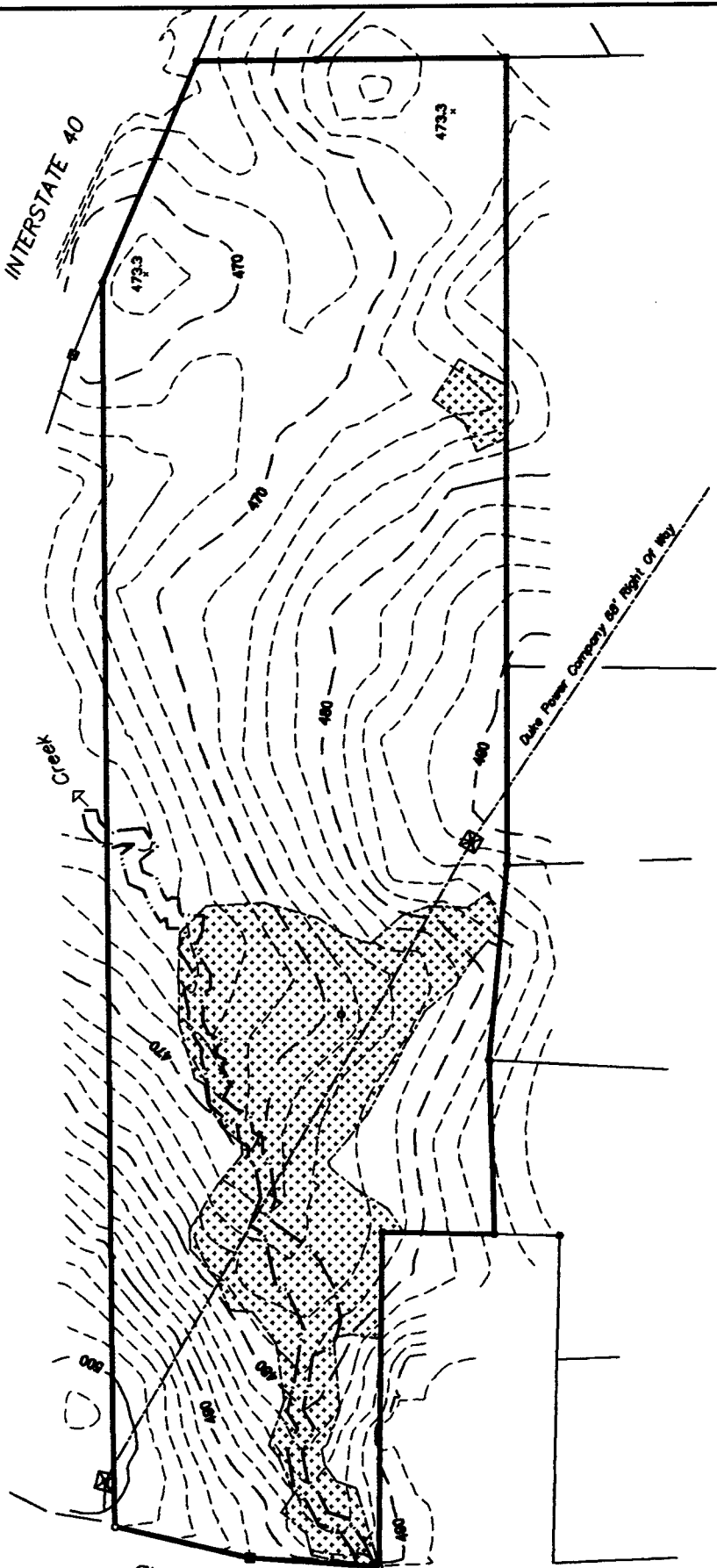
Cricket Creek

SUNRISE ROAD

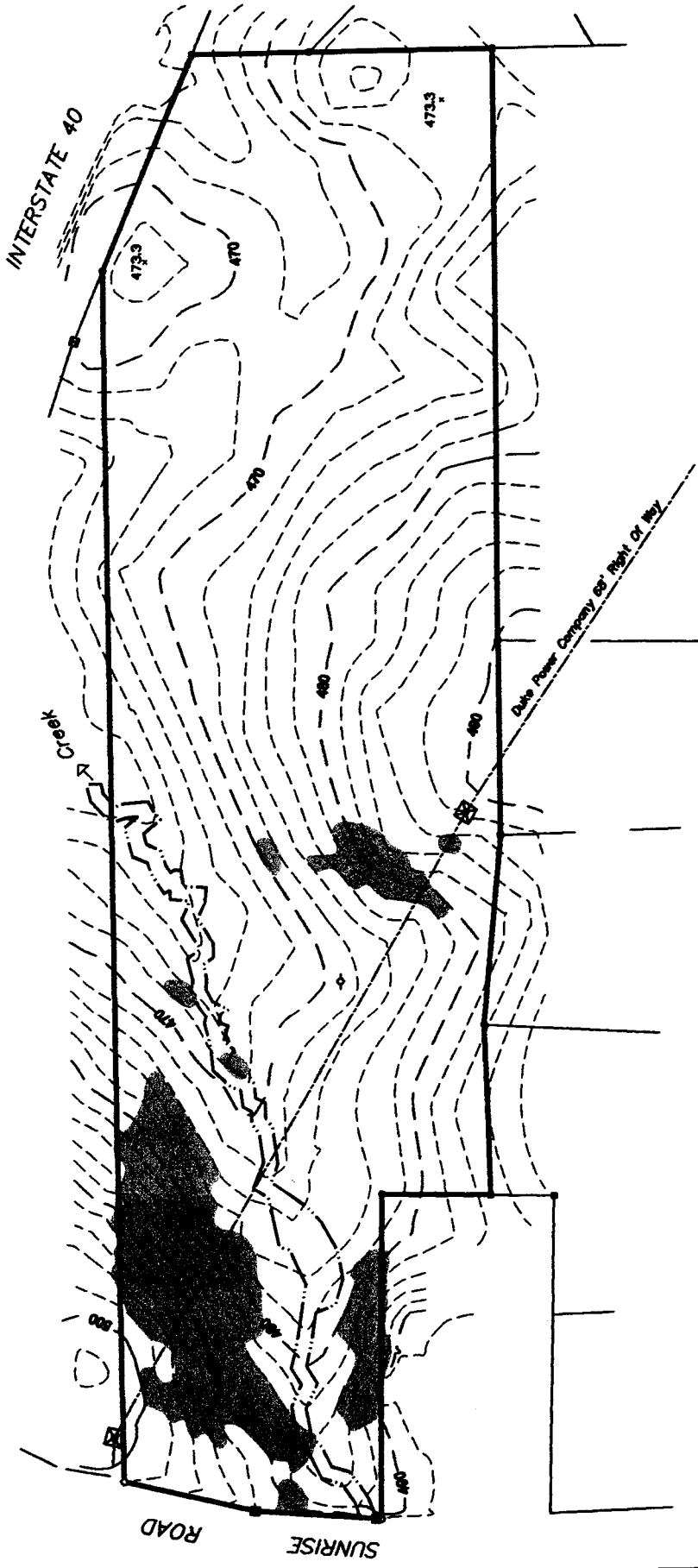
Duke Power Company 66' Right of Way

Wetlands

WETLANDS

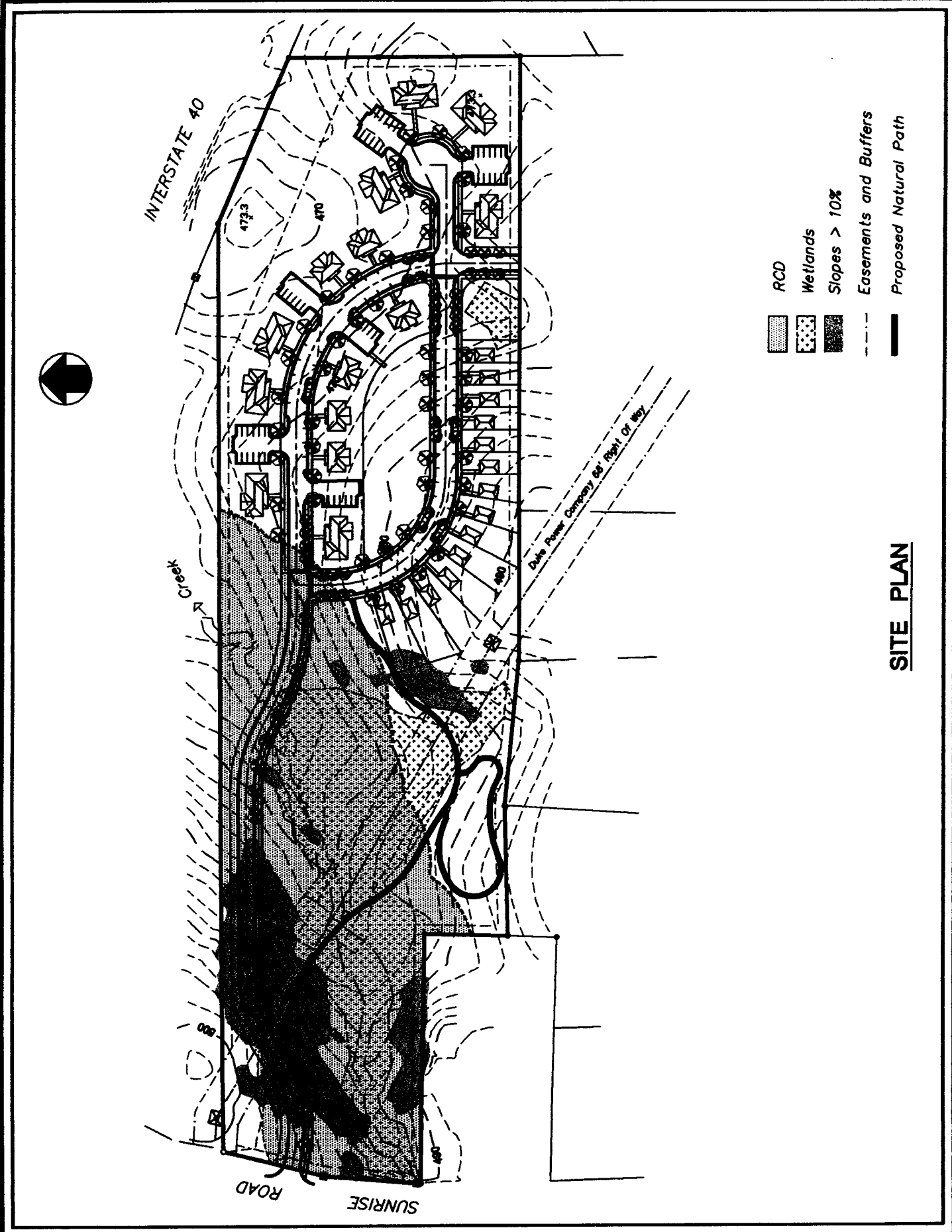






Slopes > 10%

SLOPES > 10%



- RCD
- Wetlands
- Slopes > 10%
- Easements and Buffers
- Proposed Natural Path

SITE PLAN

### **III. INTENDED COMPLIANCE WITH CHAPEL HILL TOWN COUNCIL SUGGESTED GOALS/PRINCIPLES.**

(May 12, 2003 Mayor's Committee on Proposed Habitat Development Report to the Mayor and Council)

The committee report, adopted in full by the Council, contained 17 principles for consideration by the applicant in the development of its proposed plan. The applicant has seriously considered all 17 principles and provides the following comments to demonstrate how these principles were addressed. (The 17 items are not listed in order, but identified by number and listed in groupings that help connect specific items to the design and layout of the concept plan. Responses to the items are provided after the full statement(s) from the committee report.)

#### **--PROCESS OF DEVELOPING CONCEPT PLAN--**

17. Future Workshop: It would be desirable for Habitat to sponsor a workshop, involving neighbors of this property, to consider possible designs for use of this property prior to preparation and submittal of a Concept Plan.

*Habitat For Humanity sponsored a public design charrette process professionally facilitated by Prof. David Godschalk. Approximately 60 members of the community participated. Half of that number were neighbors to the Sunrise property. While the Sunrise Coalition does not endorse the current Concept Plan under review, the results of the charrette process, as well as the resulting Concept Plan were made public in advance of the Concept Plan Application for discussion and review by the general public and the Sunrise Coalition.*

*Further, while no final consensus exists between the applicant and the Sunrise Coalition, neighbors' concerns were discussed at additional intervals during the design process. Prior to the charrette process, and prior to setting its own goals for the property, Habitat met with neighbors at three preliminary meetings. Habitat's adopted goals reflect the following constraints that were adopted as direct responses to neighbors' concerns expressed at these meetings, and in subsequent communication:*

- ❖ Habitat responded to neighbors' concerns of "density" by electing not to pursue re-zoning the property to "RSSC" (affordable housing) zoning; which permits dramatically higher densities and relaxes many other ordinances.
- ❖ In response to neighbors' concerns, Habitat adopted the self-stated goal that these homes will be owner occupied, postponing a long term goal of assisting the greater affordable housing community in providing rental opportunities
- ❖ In response to neighbors' concerns, Habitat adopted the self-stated limitation of not exploring partnering with any "managed-living" type

housing providers on this site. While we did not fully agree with neighbors' perspective that this type of housing would be in conflict with surrounding uses (Carol Woods is across the street, for instance), we did think it reasonable to focus our efforts on working with one "housing partner" at a time (OCHLT, in this case), to ensure a successful development process, which was another concern of residents.

- ❖ Habitat has taken up the self stated goal of keeping this a "residential" neighborhood. While no plan ever existed to build a "multifamily complex" or apartment buildings of any sort, early on that concept loomed large in the public imagination and was, perhaps, the single largest source of distress between the parties. In the current design, even the largest buildings are almost in exact one-to-one scale with surrounding existing homes. Scaling some of the living units in this way (in duplexes and triplexes) creates the further opportunity of building fewer over-all structures on the property, an intended strategy to respond to neighbors' expressed desires that the visual density of the neighborhood remain in character with suburban development in its proximity.
- ❖ In contrast to the adjoining Chandler's Green subdivision, a "traditional lot" subdivision, Habitat adopted the goal of building a clustered neighborhood design. It remains unclear to us the opinion of surrounding neighbors on the cluster issue. Clustering successfully protects the largest amount of land and leaves the Sunrise Rd. "streetscape" in an almost completely rural character, accomplishments perceived as generally favored by neighboring voices. However, in many discussions the Sunrise Coalition has associated "clustering" with "density", a primary concern in their communications. Despite the ambiguity in our understanding of their position, Habitat feels that the philosophy of the LUMO and current planning techniques, the guidance of the Mayor's Committee (see # 3 below), our design goals of fostering community and protecting the environment, and the nature of the site, all point down the path of a clustered design.
- ❖ Habitat has, to date, enforced its own strict quality control on the design process, requiring that each and every living unit in the Concept Plan meet expectations. Habitat leadership has already reviewed earlier drafts of the Concept Plan, including only living units that meet these expectations.

--BREADTH AND VARIETY OF HOUSING OPPORTUNITY--

4. Consider Developing Housing for Varied Income Levels: Prepare plans, perhaps in cooperation with other agencies, such that the development provides housing opportunities for homeownership for persons of low and moderate income. Various building types and designs would be allowed in the present zoning district under the Land Use Management Ordinance in a manner that would be consistent with the Comprehensive Plan.

10. Possible Development Partners: Partnerships with other nonprofit organizations may enhance the variety of housing opportunities that are developed on this site. It is expected that all housing built on this site will be affordable to individuals and families with income below 80% of median income.

*Habitat for Humanity intends to offer housing opportunities for its own clients, earning up to 50% of median income, as well as those of other local non-profit housing providers serving clients up to 80% of median income. All housing in this new neighborhood is intended to be affordable and to be controlled by deed restrictions or similar devices which will maintain affordability for future owners.*

*A key design feature that will enable the broadest offering of housing types is the use of differing sizes and types of structures in the plan. We believe that this flexibility will best serve the partnership of multiple housing providers, as well as offer opportunities to each of our clients.*

*The likely "partner" to Habitat in providing housing in this neighborhood is The Orange County Housing and Land Trust (OCHLT) and a letter of understanding exists between the two organizations. Because OCHLT's model depends on identifying exact project costs and matching them to exact sources of subsidy, OCHLT has not, and will not, be able to enter in to specific agreements regarding the project until such time as a "final" design is completed. As such, Habitat remains the "development partner" and fills the role of "applicant" in these proceedings.*

--COMPREHENSIVE PLAN, ZONING & LUMO EXPECTATIONS--

1. Retain Present Zoning: The present zoning of this property is Residential-2. For a property of this size in this district, development applications can be filed for either subdivision or Special Use Permit that would accommodate most of the possible development scenarios that have been discussed. We suggest that development plans be drawn in a manner that meets the requirements of this zoning district.
2. Compliance with regulations: Plans should be drawn in a manner that would meet all regulations in the Land Use Management Ordinance at the time that an application is considered by the Council. We note that the Council is continuing to monitor and evaluate the new Land Use Management Ordinance, and that there may be adjustments made to the Ordinance in the future.

*The Concept Plan is proposed to be developed in the Residential-2 Zoning District as a "Planned Development Housing – Special Use Permit."*

*The proposed density is 2.9 dwelling units per acre and falls within the 1-4 units/acre Low Residential Land Use Category of the Chapel Hill Future Land Use Plan.*

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***The Applicant believes that the Proposed Concept Plan when fully developed and submitted as a formal SUP application will meet all the ordinance requirements of the Town of Chapel Hill.***

--ENVIRONMENTAL AND COMMUNITY DESIGN PRINCIPLES--

3. Consider Clustering Development: Whatever density and/or intensity is permitted on this site under existing zoning should be clustered so as to take advantage of buildable areas and minimize disturbance to sensitive areas.
8. Building and Site Design: Careful attention should be given to site and building design, with sensitivity to the environment. Development should avoid the power line and Resource Conservation District corridors and result in buildings that are attractive.
12. Provide Corridor for I-40 Greenway: Chapel Hill's Greenways Plan contemplates a trail along the south side of Interstate I-40. This proposal should provide easements along the portion of that trail that will cross this property.
15. High-Voltage Power Line: Prepare designs that minimize proximity of dwellings to the power line corridor.

***The Concept Plan proposes to cluster development on the eastern half of the site to avoid the RCD and wetlands in the western portion of the site. The clustering of the homes and the proposed use of streets and small off-street parking areas allows site disturbance to be minimized. Additionally, we believe that clustering the living areas in conjunction with the active recreation space at the core of the built area will significantly enhance the sense of community created by the design.***

***The 100 feet buffer along I-40 assures that there will be land available along the I-40 corridor for the planned Chapel Hill Greenway. Easements will be provided as needed and determined during the review of the SUP.***

***The curved internal roadway and lot layout arrangement for the single family detached homes permit the retention of existing vegetation at the rear of the lots abutting the power line easement and minimizes the number of homes located along the easement.***

--RECREATIONAL AMENITIES--

5. Provide Recreation Amenities: If a subdivision application is prepared, it is required that land be set aside for recreation; if a Special Use Permit application is prepared, it is required that amenities for active recreation be provided. Regardless of the type of

application, plans for development of this site should include active recreational amenities.

*The Concept Plan identifies a large space at the core of the clustered development for active recreational uses. This feature is a fundamental part of the Concept Plan and represents our commitment to the principal of a unified community. At this time, we have not chosen specific recreational improvements for this location. We are considering using the area as two spaces (the sum of the space is equivalent to a football field), each focused towards a different age group.*

*The layout of the Concept Plan provides an additional recreation area to the west of the power line easement. We consider this an excellent opportunity for a "flex" recreation space that could take on whatever use is desired by residents of the neighborhood, whether that be a small ball field, gathering area, or gardening plot.*

*We believe the recreational "gem" of the site is the abundant amount of preserved natural area and we believe this resource certainly lends itself to use through a network of low-impact footpaths.*

*We are aware of the abundant open space available under the power lines in the neighborhood. We note that many neighborhoods develop this space as very desirable recreation space. We are currently neither endorsing nor ruling out this potential, but we are not representing this area as "primary" recreation space at this time.*

*We foresee that all the recreational spaces and improvements in the neighborhood will remain private property under the care of a new Home Owner's Association. Because this is intended to be an affordable neighborhood, we intend to be mindful of the long term maintenance costs and requirements for all recreational amenities.*

--VEHICULAR AND PEDESTRIAN CIRCULATION CONSIDERATIONS--

13. Study Sunrise Road Access: Study the Sunrise Road corridor to select and access point for this development that addresses sight distance concerns for ingress and egress.
6. Consider Public Transit: Plans for the development of this property should explicitly consider current and proposed transit routes, and provide reasonable access and sidewalks to public transit locations. If amenities are needed (e.g., a bus shelter), they should be included in the proposal and provided by the applicant.
7. Provide Sidewalks and Pedestrian Paths: Provide adequate pedestrian paths to destinations in all directions from the site, including connection to a future greenway along I-40.

9. Minimize Impacts on RCD for Road Construction: Design the street network and utility systems so as to cross the Resource Conservation District in the least disruptive locations, and with the fewest possible crossings.
  
16. Consider Stub-outs: Review adjacent development patterns, existing and potential, to determine if it is desirable/feasible to stub-out streets at the edges of this property, for possible future extension.

***Current existing road access is only available along Sunrise Rd.***

***It is normal practice that an applicant review access conditions with NCDOT on state owned roads to determine the best location(s) for new access roads, and also with Town Engineering staff when Town roads are involved. In this case, both parties, as well as the applicant, have an interest in the design of the roads and public safety. A site visit by a DOT engineer yielded a favorable opinion about the location of the proposed entrance road near the existing power pole location. This is the location on the neighborhood entrance depicted in the Concept Plan.***

***A Traffic Impact Analysis will be conducted by a Town selected traffic consultant (see section IV. below). This report will address traffic volume, location, alignment and improvements believed to be appropriate for a safe and functional entrance road. The results of this analysis will be incorporated in the formal PDH-SUP application.***

***The current Concept Plan has no competing features at or near the entrance, giving the design of the entrance complete priority for space/location. The RCD along the perennial stream on the property does reach to part of the boundary with Sunrise Rd. and should the entrance design conflict with the RCD boundary, Council will have to set priorities. Required road improvements are a permissible use in the RCD.***

***Extending from the entrance at Sunrise Rd. and traveling east across the property, the Concept Plan depicts the road bed, and corresponding utility easements, along the northern boundary of the property. This provides for a minimal disturbance of the RCD, prevents most or all disturbance of the jurisdictional wetlands, provides the greatest flexibility for future development of the tract of adjoining land to the north (without need for an additional entrance on Sunrise), and provides the gentlest possible grade for the road and the accompanying sidewalk.***

***The Concept Plan provides for a vehicular and pedestrian connection to the largest adjoining tract of land to the south (the "Potted Plant" property), which in turn provides opportunities for connectivity through out the entire network of existing subdivisions to the south and east, and the East Chapel Hill High School. The owner of this adjoining property is currently preparing a separate development application. We are informally coordinating the alignment of that connection, but would request support from Town staff in this logistical effort. In addition to connections for road and walkways, we expect that this location will be a key connection for utility easements. We note that the current location of the southern stub out in our Concept***



*Plan is located so as to leave the adjoining, small, non-jurisdictional wetland undisturbed. Should greater priorities emerge, our Plan could afford a shifting of the connection point to the west, but could not support a shift to the east without significant impact on building layout.*

*With the road layout on the northern property boundary, and the stub out to the south, all adjacent undeveloped tracts are served by the Concept Plan.*

*In the event that efforts to develop the "Potted Plant" property come to fruition, the execution of our Concept Plan will provide both pedestrian and vehicular connectivity from Sunrise Rd. through to Chandler's Green, Silver Creek, Spring Crest and out to both Weaver Dairy and Erwin Roads. We are optimistic that this feature will greatly enhance the character of our new neighborhood, especially if future bus service can be routed in this area.*

*We note that the proposed street profiles in the Concept Plan are sufficient to support residential automobile traffic, as well as buses and emergency service vehicles. We do not believe at this time that there is significant conflict, in terms of traffic volumes, between the use of these improvements as meaningful connections with adjoining neighborhoods and as residential "neighborhood" streets. The Concept Plan provides several specific features intended to be used to control the speed and care with which drivers pass through the neighborhood. We will continue to analyze the character of these streets and walkways based on traffic study information as it becomes available.*

--INCLUSION--

11. Develop Designs that Promote Inclusion: Seek designs that will promote interaction between this proposed development and surrounding areas; avoid designs that would serve to isolate residents of this proposed development.

*As described above, we believe this Concept Plan includes features that provide an excellent level of connectivity with adjoining neighborhoods. Pedestrian connectivity, in particular, provides excellent opportunities for shared experiences, whether they be those of residents walking through adjoining neighborhoods, perhaps to the nearby school facilities, or those of guests choosing to enjoy the unique recreational features of this neighborhood which are not available in adjoining neighborhoods.*

*While we accept as fact that comparatively modest homes of perhaps 1100 square feet or so will not look remarkably similar in scale to some of the existing homes in adjoining neighborhoods, we are excited by the potential to blend the scale of the neighborhoods using the technique of clustering some of our homes into duplex and triplex buildings. We are confident that, within the new neighborhood, we can blend buildings of varying scales through the use of architectural themes, while we can blend with larger surrounding houses through the use of scale and proportion.*

*We are also encouraged that the Sunrise Road area has a broad demographic character; a variety of styles, sizes and ages of homes are located immediately adjacent to and nearby the Habitat property. Residents of older homes seem relatively at peace with newer homes recently introduced to the area. All of these homes, in turn, seem in concert with the adjoining planned living campus of Carol Woods. And this wide variety of residential accommodations appears well balanced with other surrounding uses, like the East Chapel Hill High School and local commercial businesses on Weaver Dairy Rd.*

*As with all neighborhoods that Habitat creates, this neighborhood will have its own Home Owner's Association which will be initiated and nurtured by professional and volunteer support. The immediate and successful creation of this forum for neighborhood leadership will also provide an excellent point of contact for relationships with surrounding communities and for involvement in community issues.*

--SEWER SERVICE (AND OTHER UTILITIES)--

14. Consider How Best to Provide Sewer Service: Seek designs that minimize RCD disruption and allow for future extension of utilities to nearby properties.

*While a specific design layout of sewer and water services is beyond the scope of a Concept Plan application, certain facts are known at this time:*

*Sewer service from the living units in the new development, as well as any future development on adjoining parcels, will be collected by gravity feed to a central location on the property. OWASA planners have confirmed that a sewage pump station will then be required (and permitted) to transfer sewage to the most expedient connection point along the existing OWASA sewer system. It is unknown at this time if the pressurized line would pass through the proposed development on the "Potted Plant" property, or travel out to and along Sunrise Rd. However, in either case, it would appear that most of the improvements can be provided for in the road right-of-ways, thus minimizing impact.*

*The pump station itself will require a central location at a low point, which necessitates its proximity to the perennial stream in the RCD, which is a permitted use. We expect to engineer the elevations of the sewer lines and the pump station to facilitate placement as far up in the RCD (away from the stream bed) as possible. We intend to follow all OWASA guidelines regarding the design and maintenance of the pump station.*

We believe the Sunrise Rd. Concept Plan, as submitted, meets all 17 of The Mayor's Committee's Guidelines in meaningful ways. We invite all parties to continue to provide comment and share ideas to supplement the current design.

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**IV. PROGRESS and THINGS TO COME:**

The gears of progress are ever-turning and in the days since our first discussion of this project at the September CDC meeting, some steps forward have been taken. In the interests of accuracy, please be aware of the following new information:

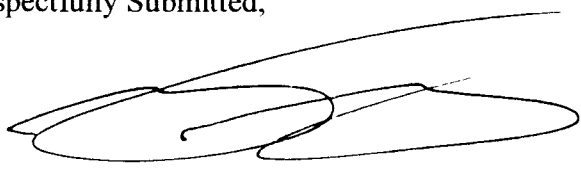
Under direction of the project engineer, Mr. Warren Mitchell, preliminary soil testing has been completed at the site. Findings from this testing were generally uneventful and do not materially impact Habitat's vision for the neighborhood. Should the technicalities of the report become relevant to topics of discussion, Mr. Mitchell will be present at the October CDC meeting to provide the available information.

Mr. Mitchell has also, upon instruction from Habitat leadership, contacted the Town staff to request the usual and necessary traffic study for this project. Such study, we understand, is undertaken by third party experts under supervision of Town staff at the Applicant's expense.

Habitat has retained the services of GGA Architects to assist in the design of homes in this neighborhood. GGA will also be preparing architectural standards for the neighborhood to facilitate the cohesiveness of structures built by Habitat and those built by other housing providers (presumably OCHLT).

Pending the outcome of the Concept Plan review process and any relevant changes, Habitat's search for design assistance to review and enhance its plan and translate it into a complete design is ongoing. Habitat is researching available resources in various technical and design fields to best support its design and the resulting future neighborhood of homes. We welcome all comments.

Respectfully Submitted,



Glen Greenstreet  
Chair, Sunrise Site Planning Committee  
Habitat for Humanity of Orange County



9-28

(126)

Gene:

Copies of  
Referenced Documents

8-18 + 9-22 CDC

meetings

Thank-

you-

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## **Wake Habitat's Approach to Building "Ideal" Communities: A Report from the Ideal Community Task Force**

The Habitat Ideal Community Task Force was established by the executive committee in an attempt to define and circumscribe what ideal Habitat communities would be like were we able to control their development to the greatest extent possible. The task force was asked to consider questions such as:

Does Habitat want to act as a developer of subdivisions? If so, how large should those subdivisions be? Can a neighborhood become too densely packed with Habitat houses, and would a dense concentration of Habitat houses pose threats to the social and economic well being of that neighborhood's own residents? Is it possible to create partnerships with other builders to develop mixed-income communities that would provide greater stability, hope, and physical appeal to residents? As one committee member aptly put it, "We want to provide as much affordable housing in our community as possible, without creating tomorrow's slums. How do we avoid, at all costs, building tomorrow's slums?"

The Committee was asked initially to explore the possibilities of partnering with other nonprofit and for-profit builders and developers who are interested in building some level of affordable housing. The issues explored included building communities that contained some level of socio-economic diversity. In addition, we queried other Habitat affiliates across the country to gain feedback on any experiences that they had building larger neighborhoods (40 + units) either alone or with a private or public partner.

While there is no magic number beyond which we would not work in isolation, we agree that our affiliate should either seek out partnership(s) on any development exceeding 25 units or begin to do some self-stratification within our own neighborhoods of 25 plus houses. For example, if Habitat is developing a 40-unit single-family subdivision, it could achieve some socioeconomic diversity by setting aside 13 units for families at 40-60% AMI, with the remaining 27 units being reserved for families below 40% AMI.

Wake Habitat's prevailing method of development has been to assemble small, scattered site parcels in a variety of communities throughout Wake County. This approach has worked well thus far, enabling us to provide a number of location options to the families with whom we are building homes, while providing access for a wide divergence of congregational and corporate volunteer groups. Over the next three years, Habitat is anticipating that we will assemble our sites in much the same way as we are now, with one major exception. In order to increase our housing production to the level of 30 to 40 homes per year, we will need to add to our development mix plans for larger projects of anywhere between 40 and 300 units.

In order to make these larger communities successful over the long-term, we firmly believe that each should include some socio-economic diversity. In order to achieve some level of diversity, we believe that the best strategy will be for us to join forces with other like-minded organizations, from either the nonprofit or for-profit community, to whom we offer our unique set of resources and expertise. As such, we have begun

preliminary exploratory conversations about the possibility of establishing joint venture agreements with other builders and municipalities. Such developments would likely involve other developers who would be willing to produce market-rate housing in the \$110,000 to \$160,000 price range within the context of the development.

At the present time, Habitat has substantial resources with which to move into larger scale developments. Aside from opportunities to acquire larger parcels of land, we have resources that include public funding from a variety of sources, such as HOME, SHOP, NC Housing Finance Agency, Wake County, City of Raleigh, Town of Cary, along with our current cash on hand. We also have a wide range and degree of public support and acceptance. On the heels of our successful inaugural Builders Blitz, we are presented with an opportune time to pursue the feasibility of joint ventures and strategic alliances and accelerate the pace of our production so that we can meet the drastic need for affordable housing in our community.

The Committee was able to compile limited information on possible joint venture partners that include:

- Lyle Gardner and Spectrum Homes
- William Barker and Spence Harrell
- Cliff Zinner and RD Construction
- DHIC-Gregg Warren
- Episcopal Housing Ministry
- Pulte Homes – Larry Lippincott of Raleigh
- Anderson Homes
- Beazer Homes

Our efforts led us to research several other large developments attempted by other Habitat affiliates. The responses varied widely, based on the goals and leadership of the individual affiliates. Some affiliates felt their goal was to build as many homes as possible on whatever parcels of land were available to them. They did not have any stated regard for the long-term issues to the community or the families living in the communities. It is clear that this committee is not in agreement with that approach.

We did not identify a magic number concerning the density of Habitat homes in an ideal community. The committee felt—based on our discussions, research and limited interviews—that 25-30 homes was the limit that we should consider. We feel that this represents a manageable number of homes; a small development that is more likely to be sustainable over time, allowing homeowners to maintain a safe, attractive, and vibrant community.

Discussions with developers indicate that the keys to successful partnering and joint ventures on future neighborhoods are strategic and thorough planning and a clear outline of expectations and agreements prior to beginning construction. All parties should have input on the subdivision layout, price ranges of homes, lot selection, infrastructure, architectural and design concerns, etc. Some developers expressed concern about the concentration of Habitat housing in a larger development, were they to be involved in its build-out. One indicated that, for example, in a mixed-income subdivision of 100 units,



Habitat only build 25-35 percent of the housing, allocating the remainder to market-rate housing in the \$110,000 to \$160,000 range.

As a brief informational note to this report, the following are excerpts and comments from various Habitat affiliates that illustrate some of the partnership efforts going on across the country.

- Valley of the Sun HFH is currently partnering with a nonprofit organization, Community Services, to develop a 195-unit subdivision. A large community center is part of the plan and they intend to form active partnerships with groups whose services compliment the work of Habitat.
- Charlotte HFH tends to build a large number of homes in in-fill neighborhoods. Greensboro HFH has built large new subdivisions, often in near rural parts of Guilford County. In both of these cases, their feedback indicates that a more complete approach to building community was needed, as evidenced by crime and juvenile delinquency issues that have arisen in some of their neighborhoods.
- High Point and Rowan HFH have both had experience with sharing building sites with other developers and would like to do more. They have had difficulty creating these partnerships.
- Sandtown (MD) HFH has developed and revitalized a 10-12 square block neighborhood and completed about 200 homes. While this development appears to be very successful, the lack of physical and economic resources close to the residents has been an issue. They have partnered with a local community church to help provide resources for childcare, health care, arts and media, and a job placement and job training service.
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- Atlanta HFH has developed a two-phase subdivision consisting of 19 and 26 homes. They have not partnered with other developers at this point, and are of the opinion that partnering is an attractive concept. However, they are currently concerned that they must be equal partners with any potential partner.
- Richmond HFH is currently building a 29-home subdivision that has been a success. It does include a large green area. They are of the opinion that any large acquisitions of land would be retained only for their own development.
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According to information from NC Fair Housing, the market for affordable housing is wide open if developers can find a way to make a profit building affordable. Due to market considerations, Habitat may find it an opportune time to find experienced, capable, and ethical builders to work with as partners.

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Gregg Warren of DHIC is currently building a 68-unit project off Raleigh Boulevard, not far from Rose Lane. The homes are expected to sell between \$105,000 and \$140,000. Sales of these houses could be an interesting market indicator for us as we begin efforts to find willing partners who want to create mixed-income communities for people living between 30 and 100% of AMI.

## **Policy Recommendations**

### ***Premise***

In making these policy recommendations, the Ideal Community Task Force recognizes that it is attempting to put mechanisms in place to avoid building tomorrow's slums. We want our homeowners to live in safe, attractive, stable, sustainable neighborhoods that we can walk or drive through in 20 years and feel good about.

### ***Recommendations***

- Believing that a Habitat neighborhood's social and economic diversity contributes to its strength, the task force suggests that Habitat for Humanity of Wake County avoid large concentrations of low-income families in the communities it builds. Habitat should always aim to build healthy, sustainable neighborhoods and communities. As

part of that long-term commitment, we should explore a strategy of partnering with other organizations, both nonprofit and for-profit, when building out communities greater than 25 houses (or units) in order to achieve mixed-income neighborhoods.

- When building communities of 25 single-family homes or more, Habitat should strive for the greatest degree of economic diversity it can achieve. The most likely method for doing this is to work with market-rate developers who are interested in building entry-level housing or houses for first-time homebuyers. The concentration of Habitat housing, in relation to market-rate housing, would need to be negotiated on a case-by-case basis with the willing partner(s), but we would apply consistently the principles of sustainability, diversity, and integration and attractiveness of design.
- In mixed-income neighborhoods, we would seek to integrate Habitat homes throughout an entire subdivision, mixing them with market-rate houses, as opposed to segregating the Habitat homeowners on individual streets or cul-de-sacs.
- In those instances where Habitat cannot attract market-rate or suitable nonprofit partners, we should stratify our own neighborhoods of 25 houses or more, reserving about 30% of the housing for families living between 40% and 60% of area median income. Families who are relatively upwardly mobile are likely to be more stable. To the extent feasible, we believe it would be a good thing if they act as role models for their neighbors who have fewer immediate resources.
- Habitat should not exclude from consideration the acquisition of any piece of land simply based on its being too large (or too small). Habitat should investigate all opportunities to build affordable housing, including:
  1. Acting as developer on single-family subdivisions of differing sizes (from 10 to 100 units) and selling lots to other builders when it is in our best interest.
  2. Contracting with a developer to produce for us buildable lots on part or all of a site we own.
  3. Producing in-fill housing, weighing its merits on a case-by-case basis.
  4. Purchasing lots/land from builders in new subdivisions.
  5. Building multi-family housing units, such as townhomes or duplexes.



# Habitat plans neighborhood of mixed-cost housing

By CINDY GEORGE  
STAFF WRITER

RALEIGH — A creative land sale has given Habitat for Humanity of Wake County enough space to mix it up in Southeast Raleigh, an approach that may satisfy concerns that too much low-cost housing is concentrated in the area.

Habitat plans to create a neighborhood of 70 houses — 30 of them low-cost homes the nonprofit group usually builds and another 40 market-rate houses built by a private developer.

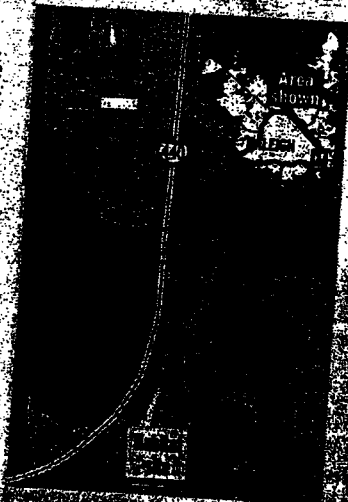
The mix would make the neighborhood more sustainable over a long period of time, said Joyce Watkins King, Habitat marketing and development director.

"We didn't want to build tomorrow's ghettos with people of all the same income," King said.

Other Habitats have gone in and built 100 homes and are beginning to see some problems.

The nearly 20 acres Habitat has acquired off Poole Road is the group's largest tract of land. Joe Lee, a tobacco farmer's son, intended to raise muscadine grapes on the land before the BeLine cut through.

Joe and Ruth Lee placed their



property in a charitable remainder trust, which allows donors to transfer cash, securities or property and receive tax benefits. Habitat bought the land from the trust for \$6 million. Joe Lee gets payments from the trust and when they die, the assets transfer to Habitat.

The project would be the fourth Habitat venture in Southeast Raleigh in recent years. Biltmore Trace, a 28-house neighborhood, is under construction off Waters Drive. And 11 new Habitat homes are on

Darby Street, just blocks away from the newest project.

Habitat also plans to build about 40 houses on Rose Lane, also off Poole Road.

Tyler Totton, a member of the Southeast Raleigh Assembly, a group appointed by the Raleigh City Council to seek economic development in the area, believes the area needs a mix of income levels of people and welcomes Habitat's latest proposal.

One of the things we've been trying to do is get the market-rate housing. The market-rate housing is not being built. It's the worst substandard structure in the area. If they don't build it, then that's fine. More than half of it will be market-rate and the other half will have to start somewhere.

The large tract of land in Southeast Raleigh has attracted Habitat's interest, but some have criticized efforts to concentrate affordable housing of any kind, rental or owner-occupied, in Southeast Raleigh.

Staff writer Cindy George can be reached at 829-4656 or cgeorge@newsobserver.com.



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**Name:** Rick Dean

**Subject:** Family: Habitat Area Too Hostile

Sun, Dec 28 2003 at 10:48 pm

[ [Email Msg](#) | [Invite](#) ]

**Message:**

<http://www.indystar.com/articles/6/106389-1706-009.html>

Couldn't be due to the fact that most recipients of habit homes are negroes, now could it? ;)

excerpt:

Family: Habitat area too hostile  
Nonprofit group's subdivision has improved area, others say

By Tim Evans  
[tim.evans@indystar.com](mailto:tim.evans@indystar.com)  
December 28, 2003

Guy and Leslie Camara had high hopes when they moved to their new Habitat for Humanity home in Barrington Gardens five years ago.

They envisioned a place where their children could romp in their own yard, with a mortgage they could afford on Guy's income as an independent video and film producer.

Instead, Guy Camara says, "it's almost like we got a first-class ticket to a ghetto."

Seven years after Habitat officials launched the only sizable Indiana subdivision made up exclusively of Habitat homes, Barrington Gardens is an experiment some residents say is struggling.

Four of the original 47 families have moved out or are trying to sell their homes -- a rate nearly eight times the norm for a local affiliate of the nonprofit, ecumenical Christian housing ministry.

Residents like the Camaras say the subdivision's new, vinyl-clad houses and multicolored playground mask an undercurrent of more unsavory elements: crime that has made the

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neighborhood far from an ideal place to raise children, and declining property values that mean many residents owe more on their homes than they are worth.

"The house looks great, but it is not worth anything because of where it is located," said Camara, whose family in 1998 moved into a home sponsored by Oprah Winfrey and built by volunteers from Kroger.

Habitat officials acknowledge that the neighborhood isn't perfect. But they say the development has lifted many families out of substandard living conditions, enabling them to fulfill their dreams of home ownership, while helping revitalize the Eastside neighborhood.

"I think Barrington Gardens turned out pretty well," said Jeffrey Carter, executive director of Habitat for Humanity of Greater Indianapolis. "When you drive around that neighborhood and the surrounding neighborhoods, those houses look pretty good."

#### Humble beginnings

The Habitat program is designed to help low-income people buy homes, which supporters maintain has both personal and societal benefits in the effort to address poverty.

Habitat buyers can purchase homes essentially at cost -- working side by side with civic and religious groups to provide the necessary labor. They also can get interest-free loans, so all their payments go toward the principal, helping them build wealth.

To put Barrington Gardens in its proper perspective, Habitat officials say, you have to consider what preceded it north of the intersection of Perkins Avenue and Raymond Street.

In the early 1950s, the Perkins Courts apartment complex -- a collection of two-story structures containing 176 rental units -- was built on the site.

Over the years, the apartments, overrun by crime and abandoned properties, fell into disrepair. Attempts to rejuvenate them and the surrounding area failed. By the mid-1980s, fewer than 50 of the apartments were occupied.

A final attempt to revive the complex by a group of local investors -- who planned to convert the apartments to low-cost condominiums -- was hailed by former Housing and Urban Development Secretary Jack Kemp as an urban renewal model for other cities to follow.

But the project stalled in bankruptcy in 1991, paving the way for the land to be donated to Habitat.

Habitat of Greater Indianapolis built 76 homes from 1987 to 1995. Most were on vacant lots in existing neighborhoods.

Barrington Gardens was the first time Habitat had built a large subdivision from the ground up in Indiana. At the time, variations on the approach were catching on across the country.



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Former Habitat Executive Director Kevin O'Brien said then that the 47-lot development would help Habitat step up its pace of home construction and provide the efficiencies of a large-scale, centralized project.

The Rev. Tommy Hines, pastor of Bethany Missionary Baptist Church on Raymond Street, maintains to this day that Barrington Gardens is a ray of hope in the area.

"The Habitat project has been a tremendous asset," Hines said.

Iris Joiner, who has lived in Barrington Gardens for three years, agrees.

"I feel like this was a good opportunity -- a blessing for my family," Joiner said. "I like the neighborhood."

#### Differing opinions

The Camaras and others knew about past problems in the neighborhood before they moved in, but they said Habitat officials assured them they would remain actively involved in the community, transforming the troubled area into a beacon of hope.

Guy Camara said that didn't happen: "Habitat basically walked away after the houses were built."

Amy Honeycutt D'Aquila, who moved into a Barrington Gardens home in 1998, shares that feeling.

"Habitat didn't help make it what they said it would be," she said.

She blames much of the problem on turnover in the group's staff.

The project was started under the leadership of O'Brien, who was replaced in 1998 by Diana Rice-Wilkerson. Carter replaced Rice-Wilkerson, who left in 2001.

"After a while, no one in the office knew us," D'Aquila said.

"No one was aware of promises that had been made, and there was very little follow-up. The original goal was to make a community and make it a success. But they lost sight of that."

Carter, who was not with Habitat at the time Barrington Gardens was developed, acknowledged that there are areas in which the agency probably could have done better. But he said some complaints are unavoidable.

"You are going to have some problems anywhere. And by the nature of what we do, we are going into neighborhoods that aren't the best," he said.

"Nobody is offering us land at 116th Street in Carmel."

#### Community building

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The Camaras, D'Aquila and others say they tried to make a community out of the homes clustered around two cul-de-sacs.

They started a neighborhood association, put on vacation Bible school programs and hosted block parties.

Guy Camara helped children fix their bicycles and provided "the neighborhood plunger" to assist residents with clogged drains.

But the efforts often sparked a backlash, particularly when residents or neighborhood children were confronted about problems.

A spray of small holes in the vinyl siding and a bedroom window of Camara's home is a reminder of a run-in with a troublesome youth, who turned a pellet gun on the family's home.

It wasn't the only shooting in the neighborhood.

Last New Year's Eve, six people police identified as rival drug dealers exchanged more than 50 shots on a street within yards of Dean White's home.

The melee, which took place in the middle of the afternoon, left one man dead and four wounded.

Police have been called to Barrington Gardens more than 190 times since Jan. 1, 2000, to answer a variety of calls, ranging from domestic disturbances to fights, thefts and a drug overdose, and to serve warrants.

But Indianapolis Police Department Officer Tony Kelly, who has worked in the area about 10 years, said he thought crime had gone down since the Barrington Gardens homes were built.

"People who are moving in there are taking more responsibility because they own the homes," Kelly said.

Still, it's gotten to be too much for some residents.

"We don't feel safe letting our kids play in their own yard," said White, whose son was shot with a BB gun while playing outside his home. "We feel like we are stuck in a neighborhood where we don't want to live."

Ties that bind

D'Aquila was the first to leave. In 2002, she gave up about \$10,000 in equity she had built up in the home, which was sponsored by The Indianapolis Star, and turned it back over to Habitat.

D'Aquila now lives in Louisiana.

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The Camaras put their home up for sale in May.

The 1,872-square-foot, two-story home was appraised at \$75,000 when it was built. It was one of two homes in the subdivision that was customized for a larger family. The Camaras tried to sell it for \$59,900.

"If it were in another part of town, \$70,000 would be a piece of cake to get," said their real estate agent, Jeff Davies.

Making it even harder to sell was a \$9,300 second mortgage issued by Habitat to cover the difference between the \$65,700 the Camaras paid and the appraised value.

A portion of that mortgage is forgiven each year over the life of the original loan. Families don't have to pay anything on the second mortgage unless they try to sell the home before the first mortgage is retired -- 16 years, in the Camaras' case.

The purpose is to prevent families from turning around and selling their Habitat homes for a quick profit, Carter said.

But in reality, the second mortgage ties many Habitat families to their homes for years.

Carter said about a dozen of the 247 families that have bought Habitat homes in the Indianapolis area have resold them -- primarily because their fragile economic situations leave them few options to make conventional home purchases.

#### Addressing concerns

Carter said Habitat is taking steps to address the concerns raised in Barrington Gardens.

Habitat is putting more emphasis on classes to teach new homeowners to deal with issues such as starting neighborhood associations, he said. Habitat plans to help Barrington Gardens residents revive their neighborhood association next month.

While Carter doesn't rule out another Habitat-only subdivision, he said the organization more likely will pursue projects that mix Habitat and market homes.

The changes will come too late for the Camaras.

Earlier this month, they packed up their nine children and possessions and moved to a home they bought in Washington Township.

[Back](#)



Gene Poveromo

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ATTACHMENT #2

**From:** Susan Levy [slevy@orangehabitat.org]  
**Sent:** Tuesday, September 28, 2004 4:08 PM  
**To:** Gene Poveromo  
**Cc:** Town Council; Schworer, Doug  
**Subject:** Sunrise Ridge Concept Plan-Letter from Greg Kirkpatrick regarding Wake County Task Force Report

**Attachments:** Orange Co Habitat letter re Sunrise.doc; Ideal Community Task Force Report 2002.doc



Orange Co Habitat letter re Su...  
Ideal Community Task Force Rep...

Gene,

Attached is a letter from Greg Kirkpatrick, the Executive Director of the Wake County Habitat for Humanity affiliate. Please forward it to the members of the Community Design Commission in response to their request for additional information about the Wake County Habitat Ideal Community Task Force Report. As you will recall, members of the Sunrise Coalition quoted the Report to support their opposition to our concept plan for Sunrise Ridge at the September 22, 2004 meeting of the CDC. I am also attaching the report in its entirety. Greg Kirkpatrick is sending me the hard copy version of his letter, which I will mail to you when I receive it.

Susan Levy, Executive Director  
Habitat for Humanity, Orange County  
1829 E. Franklin Street #1200B  
Chapel Hill, NC 27514  
919-932-7077



September 27, 2004

Community Design Commission  
Town of Chapel Hill  
306 N. Columbia Street  
Chapel Hill, NC 27516

Dear Commissioners:

I am writing to you at the request of Susan Levy, Executive Director of the Orange County affiliate of Habitat for Humanity of Orange County. At your September 22, 2004, meeting, members of the Sunrise Coalition quoted from Habitat for Humanity of Wake County's Ideal Community Task Force Report. According to Ms. Levy, the Coalition used our report to bolster their arguments in opposition to the concept plan that Orange County Habitat is proposing for their Sunrise Road site in Chapel Hill. I thoroughly regret their misappropriation of the document for that purpose and certainly cannot lend my voice or our committee's voice to any opposition to Orange County Habitat's plan.

The development that Orange County Habitat proposes for Sunrise Road very much conforms to the recommendations made by Wake's Ideal Community Task Force. I understand that Orange County Habitat plans to partner with another affordable housing provider to create a mixed income community, serving homeowners earning between 25% and 80% of the area median income. One of the recommendations of our Task Force was that "we should explore a strategy of partnering with other organizations, both nonprofit and for-profit, when building out communities greater than 25 houses (or units) to achieve mixed income neighborhoods." Furthermore, according to our own report, when we cannot attract market-rate or suitable nonprofit partners, we aim to "stratify our own neighborhoods of 25 houses or more, reserving about 30% of the housing for families living between 40% and 60% of area median income." This is precisely what Orange County Habitat has proposed in its plan for Sunrise Road.

I understand from Ms. Levy that the Sunrise Coalition is very concerned about the density of the development that Orange County Habitat is proposing. The density of the proposed development is 2.9 homes per acre, less than the allowable density under the current R-2 zoning that allows up to 4 units per acres. By Wake County Habitat's standards, Sunrise Road does not qualify as a dense development by any stretch of the imagination. We are currently building 42 single-family homes on a 10-acre site in southeast Raleigh. In addition, we have just gained approval from the City of Raleigh to build 86 units at a 20-acre site. Habitat will build 36 of those 86 units; a market-rate builder partner will build 50 units for families up to 80% of the area median income. So, the entire site will qualify as "affordable housing" by any standard definition.

I believe that Orange County Habitat is proposing a development for Sunrise Road that is very much in keeping with our committee's report. I encourage you to read

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the full report, which is attached, and to feel free to call me if you have any questions or need further clarification.

Sincerely,

Greg Kirkpatrick  
Executive Director

Enclosure

Cc: Mayor and Town Council, Chapel Hill, NC  
Gene Poveromo, Chapel Hill Planning Department  
Doug Schworer, Sunrise Coalition



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**Wake Habitat's Approach to Building "Ideal" Communities:  
A Report from the Ideal Community Task Force**

The Habitat Ideal Community Task Force was established by the executive committee in an attempt to define and circumscribe what ideal Habitat communities would be like were we able to control their development to the greatest extent possible. The task force was asked to consider questions such as:

Does Habitat want to act as a developer of subdivisions? If so, how large should those subdivisions be? Can a neighborhood become too densely packed with Habitat houses, and would a dense concentration of Habitat houses pose threats to the social and economic well being of that neighborhood's own residents? Is it possible to create partnerships with other builders to develop mixed-income communities that would provide greater stability, hope, and physical appeal to residents? As one committee member aptly put it, "We want to provide as much affordable housing in our community as possible, without creating tomorrow's slums. How do we avoid, at all costs, building tomorrow's slums?"

The Committee was asked initially to explore the possibilities of partnering with other nonprofit and for-profit builders and developers who are interested in building some level of affordable housing. The issues explored included building communities that contained some level of socio-economic diversity. In addition, we queried other Habitat affiliates across the country to gain feedback on any experiences that they had building larger neighborhoods (40 + units) either alone or with a private or public partner.

While there is no magic number beyond which we would not work in isolation, we agree that our affiliate should either seek out partnership(s) on any development exceeding 25 units or begin to do some self-stratification within our own neighborhoods of 25 plus houses. For example, if Habitat is developing a 40-unit single-family subdivision, it could achieve some socioeconomic diversity by setting aside 13 units for families at 40-60% AMI, with the remaining 27 units being reserved for families below 40% AMI.

Wake Habitat's prevailing method of development has been to assemble small, scattered site parcels in a variety of communities throughout Wake County. This approach has worked well thus far, enabling us to provide a number of location options to the families with whom we are building homes, while providing access for a wide divergence of congregational and corporate volunteer groups. Over the next three years, Habitat is anticipating that we will assemble our sites in much the same way as we are now, with one major exception. In order to increase our housing production to the level of 30 to 40 homes per year, we will need to add to our development mix plans for larger projects of anywhere between 40 and 300 units.

In order to make these larger communities successful over the long-term, we firmly believe that each should include some socio-economic diversity. In order to achieve some level of diversity, we believe that the best strategy will be for us to join forces with other like-minded organizations, from either the nonprofit or for-profit community, to whom we offer our unique set of resources and expertise. As such, we have begun

preliminary exploratory conversations about the possibility of establishing joint venture agreements with other builders and municipalities. Such developments would likely involve other developers who would be willing to produce market-rate housing in the \$110,000 to \$160,000 price range within the context of the development.

At the present time, Habitat has substantial resources with which to move into larger scale developments. Aside from opportunities to acquire larger parcels of land, we have resources that include public funding from a variety of sources, such as HOME, SHOP, NC Housing Finance Agency, Wake County, City of Raleigh, Town of Cary, along with our current cash on hand. We also have a wide range and degree of public support and acceptance. On the heels of our successful inaugural Builders Blitz, we are presented with an opportune time to pursue the feasibility of joint ventures and strategic alliances and accelerate the pace of our production so that we can meet the drastic need for affordable housing in our community.

The Committee was able to compile limited information on possible joint venture partners that include:

- Lyle Gardner and Spectrum Homes
- William Barker and Spence Harrell
- Cliff Zinner and RD Construction
- DHIC-Gregg Warren
- Episcopal Housing Ministry
- Pulte Homes – Larry Lippincott of Raleigh
- Anderson Homes
- Beazer Homes

Our efforts led us to research several other large developments attempted by other Habitat affiliates. The responses varied widely, based on the goals and leadership of the individual affiliates. Some affiliates felt their goal was to build as many homes as possible on whatever parcels of land were available to them. They did not have any stated regard for the long-term issues to the community or the families living in the communities. It is clear that this committee is not in agreement with that approach.

We did not identify a magic number concerning the density of Habitat homes in an ideal community. The committee felt—based on our discussions, research and limited interviews—that 25-30 homes was the limit that we should consider. We feel that this represents a manageable number of homes; a small development that is more likely to be sustainable over time, allowing homeowners to maintain a safe, attractive, and vibrant community.

Discussions with developers indicate that the keys to successful partnering and joint ventures on future neighborhoods are strategic and thorough planning and a clear outline of expectations and agreements prior to beginning construction. All parties should have input on the subdivision layout, price ranges of homes, lot selection, infrastructure, architectural and design concerns, etc. Some developers expressed concern about the concentration of Habitat housing in a larger development, were they to be involved in its build-out. One indicated that, for example, in a mixed-income subdivision of 100 units,

Habitat only build 25-35 percent of the housing, allocating the remainder to market-rate housing in the \$110,000 to \$160,000 range.

As a brief informational note to this report, the following are excerpts and comments from various Habitat affiliates that illustrate some of the partnership efforts going on across the country.

- Valley of the Sun HFH is currently partnering with a nonprofit organization, Community Services, to develop a 195-unit subdivision. A large community center is part of the plan and they intend to form active partnerships with groups whose services compliment the work of Habitat.
- Charlotte HFH tends to build a large number of homes in in-fill neighborhoods. Greensboro HFH has built large new subdivisions, often in near rural parts of Guilford County. In both of these cases, their feedback indicates that a more complete approach to building community was needed, as evidenced by crime and juvenile delinquency issues that have arisen in some of their neighborhoods.
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## **Policy Recommendations**

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part of that long-term commitment, we should explore a strategy of partnering with other organizations, both nonprofit and for-profit, when building out communities greater than 25 houses (or units) in order to achieve mixed-income neighborhoods.

- When building communities of 25 single-family homes or more, Habitat should strive for the greatest degree of economic diversity it can achieve. The most likely method for doing this is to work with market-rate developers who are interested in building entry-level housing or houses for first-time homebuyers. The concentration of Habitat housing, in relation to market-rate housing, would need to be negotiated on a case-by-case basis with the willing partner(s), but we would apply consistently the principles of sustainability, diversity, and integration and attractiveness of design.
- In mixed-income neighborhoods, we would seek to integrate Habitat homes throughout an entire subdivision, mixing them with market-rate houses, as opposed to segregating the Habitat homeowners on individual streets or cul-de-sacs.
- In those instances where Habitat cannot attract market-rate or suitable nonprofit partners, we should stratify our own neighborhoods of 25 houses or more, reserving about 30% of the housing for families living between 40% and 60% of area median income. Families who are relatively upwardly mobile are likely to be more stable. To the extent feasible, we believe it would be a good thing if they act as role models for their neighbors who have fewer immediate resources.
- Habitat should not exclude from consideration the acquisition of any piece of land simply based on its being too large (or too small). Habitat should investigate all opportunities to build affordable housing, including:
  1. Acting as developer on single-family subdivisions of differing sizes (from 10 to 100 units) and selling lots to other builders when it is in our best interest.
  2. Contracting with a developer to produce for us buildable lots on part or all of a site we own.
  3. Producing in-fill housing, weighing its merits on a case-by-case basis.
  4. Purchasing lots/land from builders in new subdivisions.
  5. Building multi-family housing units, such as townhomes or duplexes.

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From: Steve Herman [sherman@nc.rr.com]  
 Sent: Monday, October 04, 2004 12:00 PM  
 To: greg@habitatwake.org  
 Cc: sievy@orangehabitat.org; Town Council; Gene Poveromo; dschworer@aol.com  
 Subject: alleged "misappropriation" of Task Force Report

Note:  
 The following is a copy of a letter mailed today to Mr Greg Kirkpatrick, Director of Wake Habitat for Humanity in response to his Sept 27, 2004 letter to the Chapel Hill CDC with reference to HHOC's Sunrise Road project.  
 I request that the present email be forwarded to CDC members and to the Mayor and Town Council members, and that it be copied and added to the information packet already provided to these individuals by the Sunrise Coalition, of which I am a member. Thank you.  
 SHH

Steve Henry Herman  
 4 Pine Tree Lane  
 Chapel Hill, NC 27514

Greg Kirkpatrick  
 Executive Director  
 Habitat for Humanity of Wake County  
 2400 Alwin Ct  
 Raleigh, NC 27604

Oct 4, 2004

Dear Mr Kirkpatrick:

You and I spoke by phone earlier this year when I was following up on a public statement by one of your staff members referring to potential problems with large-scale Habitat developments. This person informed me of a recent report on this topic by the Wake County Ideal Community Task Force, and referred me to you to discuss it. When we spoke I identified myself as one of a group of neighbors who were concerned about certain features of the project being proposed for our neighborhood by Habitat for Humanity of Orange County (HHOC), and I described our frustration over HHOC's unwillingness to discuss potential social/environmental problems inherent in this type of large-scale development. I clearly recall an extended conversation during which you indicated that you had participated in the Task Force deliberations and in fact were one of the voices on the committee most strongly questioning the wisdom of pursuing large-scaled Habitat developments for many of the same reasons that have been raised by our neighborhood group. At the end of our conversation I requested a full copy of the Task Force report, to provide us a basis for exploring these same issues as they applied to the Sunrise Road proposal. You said you would respond to my request after sharing the report with Susan Levy and discussing it with her. Shortly thereafter I received by fax a full copy of the Task Force report, sent to me from the Wake Habitat office by a senior member of your staff. I assumed this was with your approval, and I circulated this report among our group. Subsequently we appended a full copy of the report to the packet of background information supplied to Town and County governing boards and committees assessing the Habitat proposal.

In your recent letter of September 27, 2004 addressed to the Community Design Commission of the Town of Chapel Hill you state: 'According to Mrs. Levy, the [Sunrise] Coalition used our report to bolster their arguments in opposition to the concept plan that Orange County Habitat is proposing for their Sunrise Road site in Chapel Hill. I thoroughly regret their misappropriation of the document for that purpose and certainly cannot lend my voice or my committee's voice to any opposition to Orange County Habitat's plan.' (emphasis mine)

It is unfair of you to refer to our group's use of the document provided to us by your own

office as 'misappropriation'. I understand that <sup>0477</sup>you may have been in an awkward position with respect to your HHOC colleagues, but this does not justify your publicly characterizing the Coalition's use of the Task Force document as 'misappropriation'. The topics covered in the Task Force report--and the conclusions of that report--are highly relevant to the Sunrise Road project, and there has been nothing devious or inappropriate in our citing these in the course of public debate. We have made no assertions about your group's position on the Sunrise Road project; we merely cited accurately and completely certain relevant points made in the Task Force document itself. You and Mrs. Levy may regret that we were able to reveal certain Task Force recommendations that call into question some of HHOC's assumptions, but doing so does not constitute 'misappropriation' on our part. We would appreciate your clarifying this to the Chapel Hill Community Design Committee, to whom you made this statement, and to the Mayor, Town Council members, and the others to whom you circulated copies of your letter of 9/27/04.

Furthermore, you go on to provide an endorsement of the Sunrise Road project as 'very much in keeping with our committee's report'. This sort of blanket, knee-jerk endorsement of the Sunrise Road plan is exactly the kind of issue-evading response we have been getting all along from the HHOC Board.

Again, I understand your feeling under pressure as a Habitat Executive Director to 'circle the wagons', but I am disappointed that you were willing to go along with this given your previous acknowledgement of serious concerns about the livability and sustainability of large-scale Habitat developments. Should doubts about long-term outcomes be swept under the rug for the sake of collegial solidarity? I know from our talk that you possess keen insight about the particular issues in question--livability and sustainability--that could enlighten a dialog on these sensitive issues that HHOC refuses to address. Instead, you refer in your 'endorsement letter' to the partnering aspect of the HHOC plan--which our group has never opposed--and then you cite some questionably comparable homes-per-acre figures as a basis for providing your blessing to the HHOC project. These two points are simply a diversion from the livability / sustainability issues that the Task Force report uniquely addresses and that are at the heart of the Sunrise Coalition's concerns. Your response was merely 'more of the same', and missed a valuable opportunity to help resolve the deadlock between the neighbors and HHOC leadership.

But your contribution to the debate does not need to end there. As a start, our group would appreciate your response to the two questions that follow.

The current proposal for Sunrise Road envisions a clustering of 50 residence units in an area limited by environmental restrictions to about 5 contiguous acres. This buildable area is surrounded by wetlands and woods on a property of 17 acres abutting I-40 in a semi-rural area.

Question 1: If we drop the concept of 'density' (defined as the number of housing units divided by the total property acreage) and speak instead of the equally important concept of 'elbow room' (defined as the number of housing units divided by the actual built-on acreage), how does the Sunrise road proposal compare to your projects of 42 units on 10 acres and 86 units on 20 acres? What is the average lot size in the two Wake HHOC developments cited? Are your housing units spread out over the entire properties or clustered tightly together? How many of your units are single-family dwellings and how many are multiple units? What percentage of singlefamily residences will have their own driveway? How many will have yards of sufficient size to permit typical outdoor family activities to be pursued in privacy?

We feel that the above data will be more useful than traditional density figures in assessing the comparability of the HHOC plan to what is going up in Wake County.

Question 2: In planning a Habitat housing development in which family housing units will be significantly more numerous and more crowded together than existing Habitat developments, how can we be sure that it will remain a positive social and physical environment for the generations of people who will live there? For example, how can we be certain that common space will be maintained in a manner that will sustain the neighborhood quality of life? And how will friction and disputes among homeowners--which occur more often under crowded living conditions--be resolved? Homeowner's associations are difficult and costly to develop and sustain, even in affluent communities. Do you have any evidence that this has been done successfully in a community like the one proposed on Sunrise Road?



Sincerely Yours,

(18)

Steve Henry Herman

Cc: Susan Levy, Habitat for Humanity of Orange County

Chapel Hill Community Design Commission

Mayor and Town Council, Town of Chapel Hill

Gene Proveromo, Chapel Hill Planning Dept

Doug Schworer, Sunrise Coalition

Gene Poveromo

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**From:** Greg Kirkpatrick [greg@habitatwake.org]  
**Sent:** Tuesday, October 05, 2004 10:05 AM  
**To:** 'Steve Herman'  
**Cc:** slevy@orangehabitat.org; Town Council; Gene Poveromo; dschworer@aol.com  
**Subject:** RE: alleged "misappropriation" of Task Force Report

October 5, 2004

Mr. Herman,

In relative terms and compared to Raleigh and Wake County, Chapel Hill has an absolute dearth of affordable housing. I would advocate for more, not less, were I a denizen of that fair town.

However, since I am not, I don't want to contribute any further to the ongoing debate in your town with regard to the Sunrise Road project. My capacity to be helpful at this distance is exceedingly limited. To this point, I seem to have lent aid, unwittingly, to a Coalition with a very narrow view of meeting the housing needs of all who currently live or work in Chapel Hill.

The answers to the questions you pose at the end of your letter are different for the two communities. I won't let my answers about Raleigh contribute to or skew the vigorous debate going on there.

Frankly, I'm a great believer in mandatory inclusionary zoning. Had it been instituted in municipalities across North Carolina, for developments of 50 units or more, our state would have a wonderful inventory of new, affordable housing. I'm going to allocate my energy and resources to that effort, since trying to win voluntary concessions from every community potentially affected, positively or negatively, by affordable housing initiatives seems to be an absolute impossibility.

Thank you.

Greg

Greg Kirkpatrick  
Executive Director  
Habitat for Humanity of Wake County  
2400 Alwin Court  
Raleigh, NC 27604  
(919) 833-1999 x. 235  
greg@habitatwake.org  
www.habitatwake.org

(52)

-----Original Message-----

From: Steve Herman [mailto:sherman@nc.rr.com]

Sent: Tuesday, October 05, 2004 12:16 PM

To: Greg Kirkpatrick

Cc: slevy@orangehabitat.org; Town Council; Gene Poveromo; dschworer@aol.com

Subject: Re: alleged "misappropriation" of Task Force Report

Greg,

Our group is not opposed to affordable housing--quite the contrary. What we are opposed to is lousy examples of it, which if you looked at the details in this case I think you'd see our point.

But I can understand if you are unwilling to participate any further in our debate with HHOC. It's probably a no-win situation for you, and I defer to your better judgment in begging off. Nevertheless, in your letter to the CDC you did jump in and voluntarily offer some conclusions based on comparisons between the Sunrise Road project and two large-scale developments by Wake HH. Our group would like to have the opportunity to determine how the details of the projects you cited compare with what HHOC has proposed for our neighborhood. So I am resubmitting my questions as purely factual inquiries, devoid of any request for opinion or position-taking on your part. I assume that the information is public knowledge, but it would be helpful if we could receive it from your office.

Here are the questions:

In your letter to the Chapel Hill CDC you compared the Sunrise Rd project to two large-scale HHWC developments (one under construction involving 42 units on 10 acres and a second recently approved for 86 units on 20 acres.

For EACH of these, could you provide the following information:

- 1) For single family residences, what is the average actual lot size? (we're not interested in the total property acreage divided by the number of lots, but rather the average of the actual lot sizes)
- 2) Are the houses spread out over the entire property or clustered together?
- 3) How many of the housing units in the development are single-family dwellings and how many are multiple units?
- 4) What percentage of single-family residences will have their own driveway for off-street parking?

Thanks for your assistance. I wont bother you again.

Steve

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Steve Henry Herman  
Proprietor,  
Steve Henry WoodCraft

sherman@nc.rr.com

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> From: Greg Kirkpatrick <greg@habitatwake.org>  
> Date: Tue, 05 Oct 2004 16:22:09 -0400  
> To: 'Steve Herman' <sherman@nc.rr.com>  
> Subject: RE: alleged "misappropriation" of Task Force Report  
>  
> Steve,  
>  
> See below for the answers to your questions provided by my  
construction  
> manager.  
>  
> 1) For single family residences, what is the average actual lot size?  
> (we're not interested in the total property acreage divided by the  
> number of lots, but rather the average of the actual lot sizes).  
>  
> Between 4,800 and 16,000, with most lots between 5000 and 7500 sq ft.  
>  
> 2) Are the houses spread out over the entire property or clustered  
> together?  
>  
> Generally spread out over the entire property that is buildable.  
Houses  
> may be clustered together in some cases to follow the legal  
definition  
> of a cluster development, where some land is set aside as open space  
and  
> for environmental purposes.  
>  
> 3) How many of the housing units in the development are single-family  
> dwellings and how many are multiple units?  
>  
> For now, all are single family. We may elect to do one- or two-story  
> multi-family units in the future. Less than 7% of our total  
production  
> so far has been multi-family.  
>  
> 4) What percentage of single-family residences will have their own  
> driveway for off-street parking?  
>  
> Most of our single family houses in standard neighborhoods have  
> driveways. Only those houses that are clustered, or are built with a  
> private access road, do not have driveways but do have parking  
directly  
> in front of the house.  
>  
> Greg  
>  
> Greg Kirkpatrick  
> Executive Director  
> Habitat for Humanity of Wake County  
> 2400 Alwin Court  
> Raleigh, NC 27604  
> (919) 833-1999 x. 235  
> greg@habitatwake.org  
> www.habitatwake.org

(A2)

-----Original Message-----

From: Steve Herman [mailto:sherman@nc.rr.com]

Sent: Tuesday, October 05, 2004 5:37 PM

To: Greg Kirkpatrick

Cc: slevy@orangehabitat.org; Gene Poveromo; Town Council;  
dschworer@aol.com

Subject: Re: alleged "misappropriation" of Task Force Report

Greg,

Thanks for the information--its very helpful.

As I suspected, there's a big difference between the projects you folks are building and the current plan for Sunrise Road. In fact, if the HHOC plan had the same features you've incorporated (single family only, reasonable lot sizes, off-road parking) I think the neighbors and I would be getting behind it at this point--not fighting it. The HHOC Board just cant seem to give up the idea that it creates problems when you try to put two houses where one ought to stand. The shortage of affordable housing should not be used as a permit to accept substandard design.

Good luck with your projects--I hope they are successful and further your worthy objectives.  
Steve

