# AGENDA

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| Meeting Type: | SPECIAL |
| Date: | 06/20/1995 |
| JOINT MEETING | CITY/COUNTY/SCHOOL |

City of Charlotte, City Clerk's Office

# MECKLENBURG COUNTY

## Board of County Commissioners

Joint City/ County/ Board of Education Luncheon
Tuesday, June 20, 1995
12:00 noon, Room 267

AGENDA

I. A Picture of the Future: A Regional Vision for Charlotte-Mecklenburg - Planning Staff

The next Joint Luncheon will be August 15, hosted by the Board of Education.

5.66



600 East Fourth Street • P O Box 31787 • Charlotte, North Carolina 28231 • (704) 336-2472

# MECKLENBURG COUNTY
## Board of County Commissioners

MEMORANDUM TO: Board of County Commissioners
Board of Education

FROM: PARKS HELMS

DATE: June 19, 1995

RE: CAPITAL/OPERATING NEEDS OF SCHOOLS

Much has been said and written in recent days about collaborative efforts to address the demonstrated need for new schools and repairs to existing schools. Our growing student population and the need to consider alternative measures to provide a high quality educational opportunity for our children are subjects which should be at the top of our collective agenda. I believe most of you know that I have been and continue to be a strong advocate for our schools.

In the defeat of the May 30 School Bond issue the voters have spoken and we now have the challenge of deciding what to do and how to do it responsibly. State Treasurer Harlan Boyles, one of this state's most highly regarded officials (and a very conservative money manager) has written in his recent Treasurer's Quarterly two articles which I think could be a good starting point for our discussions.

I am enclosing copies of "The Schoolhouse is Falling Down" and "A Proposal to Build More Public Schools in North Carolina." While the Treasurer's suggestions are from a statewide perspective, they deserve our thoughtful consideration as we make decisions that are unique to Charlotte-Mecklenburg. More importantly, we need to decide as a community how we will properly educate our children and prepare them for the future.

While educational policies and priorities are set by the Board of Education, we have a shared responsibility to provide resources and leadership to insure effectiveness and measurable progress.

I respectfully suggest that two things need to occur:

- The Board of Education and Dr. Murphy should present to the Board of County Commissioners a proposal no later than June 30th to address the short-term capital needs of our schools. I believe the voters who care about children and schools will support a bond issue in the $250,000,000.00 range in a November, 1995 referendum.

- We must develop a long range plan for educating our children that has the support of every segment of our community. The Board of Education should take the lead, but their efforts need the active concurrence and support of the Board of County Commissioners, the City Council, the business community, parents, senior citizens, the Chamber of Commerce, and others. This may entail creating a public awareness of and support for plans currently existing and being pursued -- but <u>we must not hesitate to accept the challenge to lead</u>!

Let us not allow a narrow defeat of the bond issue on May 30th to distract us from one of our most important responsibilities. As we seek to find a new path for long term needs, I hope we will remember that the primary issue is the educational needs of our children. I look forward to joining with all of you in setting the right course for their future.

HPH:esm

cc: Mr. Gerald G. Fox, County Manager
Dr. John A. Murphy, Superintendent

# The Schoolhouse is Falling Down!

As if public education didn t have enough problems, there is yet another crisis which must be addressed immediately how to finance and build new public schools From all across the State, in urban as well as low-wealth counties reports abound concerning the rapid increases in the number of mobile classrooms, schools with worn-out or antiquated roofs, heating and plumbing systems, and general disrepair of facilities How can we expect our children to learn if they are crowded into poorly maintained, inadequate facilities? How did this situation happen? What can be done?

## The State-Local Agreement

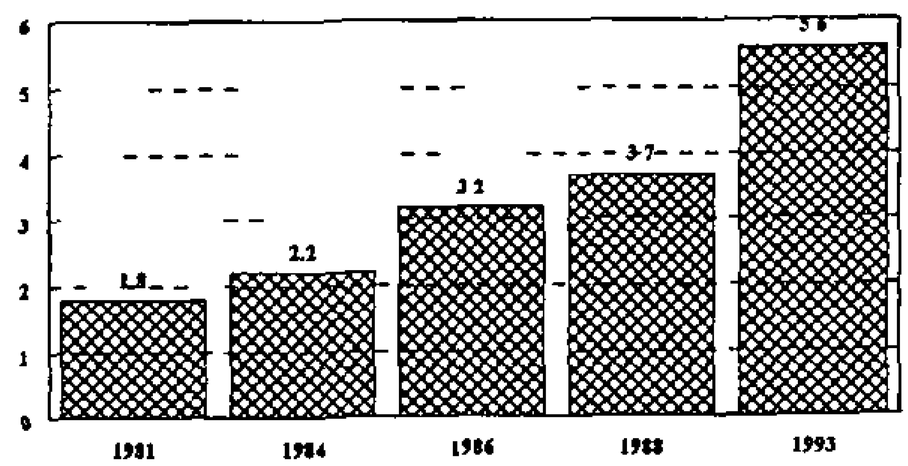
Some background is needed in order to fully understand how this condition evolved After the Civil War the 1868 constitution mandated that the General Assembly was responsible for providing a general and uniform system of public schools for a minimum term The legislature s response to that mandate was to assign to the various counties the full responsibility for operating and funding public schools in accordance with the constitution It should come as no surprise that the instructional levels did not approach 'uniform throughout the State Concurrent with the ending of the Great Depression, the State assumed responsibility for the operating expenses of the instructional program with the tacit understanding that the counties would provide and maintain the classroom buildings So was forged a State local agreement as to funding and program responsibilities a partnership which worked relatively well until recent years

Growing frustration over poor performance resulted in a number of actions by the General Assembly the State Board of Education the Department of Public Instruction, and the local school systems better known as Local Education Agencies (LEAs) While all were well intended they often contradicted and confused the basic State local agreement struck back in 1933 Evidence of this can be found in a statement recently made by a representative of the County Commissioners Association to the State Board of Education The counties, it was reported are supplementing the operating budgets of LEAs by approximately $1 billion per year, while at the same time they only spend $300-500 million a year for capital spending A logical person would assume from this information that all the building and maintenance needs of the counties were properly addressed and that the greatest needs were to enrich operations Such is not the case If the expenditures were reversed capital needs could be eliminated in short order

## Public School Construction Needs

In 1981 a survey of school construction needs in North Carolina revealed that $1 8 billion was necessary to provide adequate facilities for North Carolina s children Subsequent surveys showed this need growing dramatically even though significant funds were expended to meet the needs Over the next twelve years, more than $3 billion was spent on school construction and other capital needs Included in these expenditures were funds for furnishings, equipment and other capital needs After twelve years of spending public school construction needs (based upon recent surveys) still amounted to $5 6 billion

REPORTED NEED FOR SCHOOL CONSTRUCTION
1981 1993 IN $BILLIONS




Source North Carolina Department of Public Instruction, Raleigh, N C

What happened to cause such a rapid increase in needs? The story becomes more confusing when you learn that over the previous decade, public school enrollment remained virtually the same with little or no growth Smaller class size greater diversity in programs federal and State mandates and a growing inventory of older buildings caused much of the increased need Some of the answers lie elsewhere

## What has been done to meet the needs?

In response to the 1981 survey the General Assembly approved in 1983 a new half-cent local sales tax for counties and cities and earmarked 40 percent of the county proceeds for the first five years and 30 percent for the next five years to be spent for school construction In 1986, the General Assembly authorized yet another half-cent local sales tax and again required a portion of those funds to be earmarked for school construction In both instances the legislation stipulated that unspent funds could be used to pay school bond indebtedness for selected school bond issues According to the Institute of Government all but 29 of the State s 100 counties borrowed moneys for school construction between 1985 and 1993

After the recession of 1989-91, it was obvious that the State needed to catch up mounting infrastructure needs The State Treasurer recommended that the General Assembly include $600 million to aid public school construction in any bond package The Treasurer s proposal was that these funds be set up in a loan pool, to be borrowed by LEAs and repaid to the State This proposal never garnered enough support to be included in the 1993 bond package in essence tabling the issue temporarily (Please see related story on following page )

# A Proposal to Build More Public Schools in North Carolina

Now that the General Assembly has, in essence, mandated that the State Board of Education devise a plan to completely reorganize both the programming and funding of public education in North Carolina, the time has come to also address the capital needs of our schools Ignoring the State s growing needs for public school construction will only make matters worse Delaying action will only increase the needs It is time that North Carolina face the reality that our children cannot be expected to learn in substandard facilities

## Points to Consider

In any discussion concerning public school funding there are several factors which must be considered

- First we must reexamine the 1933 agreement be tween the State and Local Education Agencies (LEAs) to determine if it is still applicable Will the State provide funding for operating public schools and expect the LEAs to provide buildings? This is a question which must be ad dressed first by the State Board of Education, in its evaluation process and then by the General Assembly and the counties

***The first, and perhaps most important issue to be resolved, is what is the proper role for the State and what should the counties provide in the public education process.***

While it may seem a simplistic solution, there are many variables involved in securing land designing, contracting, and overseeing construction of buildings and these would best be performed at the local level The most expedient solution would be to keep the current State-local agreement in place but secure agreements on all sides that the respective parties will fulfill their obligations

- Equally important is the determination as to how these various obligations will be funded Two half-cent sales tax receipts have thus far been earmarked A proposal currently introduced in the General Assembly would add yet another one cent local-option sales tax to be approved by the voters and earmarked specifically for public school construction. Is this the best source of funding? Is it adequate to address most of the counties needs? Will it be rescinded when and if construction needs are met? These and other questions must be debated and decided so that everyone will understand

- Next we must determine how to address the needs of low-wealth counties and school districts Smaller, poorer counties use property and sales tax receipts to fund most of their needs, just as their larger, more urban sisters Because the population and property tax base is much smaller and the cost of construction is approximately the same, low-wealth counties are not able to satisfy their needs without help This issue is one which must be considered and decided by the General Assembly

While we are holding most everything up to examination, now is the time to mandate that funding will be provided for no more than one LEA per county While most counties have consolidated their various school systems there are still some 119 LEAs spread over the State s 100 counties The cost of duplicating personnel and services is no longer justifiable and the General Assembly should consider making this part of any restructuring

## *The Treasurer's Suggestions*

1 Reaffirm the long-standing role that the State provide operating and curriculum funding, including teachers, while the LEAs provide for construction and maintenance of buildings

2 Establish a permanent funding source for counties to rely upon in meeting school construction needs Allow for up to two cents from sales tax receipts to be allocated, at the option of the counties, for capital facilities The counties can vote to add or remove, as needed, the additional sales taxes

3 Provide for support from the General Fund of the State of North Carolina to help those counties considered low-wealth, so that they might meet their construction needs

4 Ask the voters of North Carolina to approve a $1 billion dollar general obligation bond issue to establish a State loan pool, allowing counties to borrow from the pool at the State's favorable interest rates, to construct and use facilities today, while repaying over a period of time

5 Require voter approval at the State level only

6 As a safeguard, all loan agreements will authorize the State to intercept and use, as needed, State-shared revenues and other State-shared taxes and fees designated to the applicant, in order to secure the repayment of obligations

# PICTURE OF THE FUTURE

**Continuing and rapid change across the Metropolitan Area**

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**PICTURE OF THE FUTURE** - This presentation provides a perspective on the future of Charlotte-Mecklenburg in context of the continuing and rapid changes occurring in major metropolitan areas First, the geographic setting is established by exploring the evolution of Charlotte-Mecklenburg as a metropolitan city Elements which make metropolitan areas successful are identified

Second, the economic and urban context of metropolitan areas is examined Global Economic Trends, Urbanization Patterns, and Principles For Community Change that define successful metropolitan areas are reviewed against current development trends

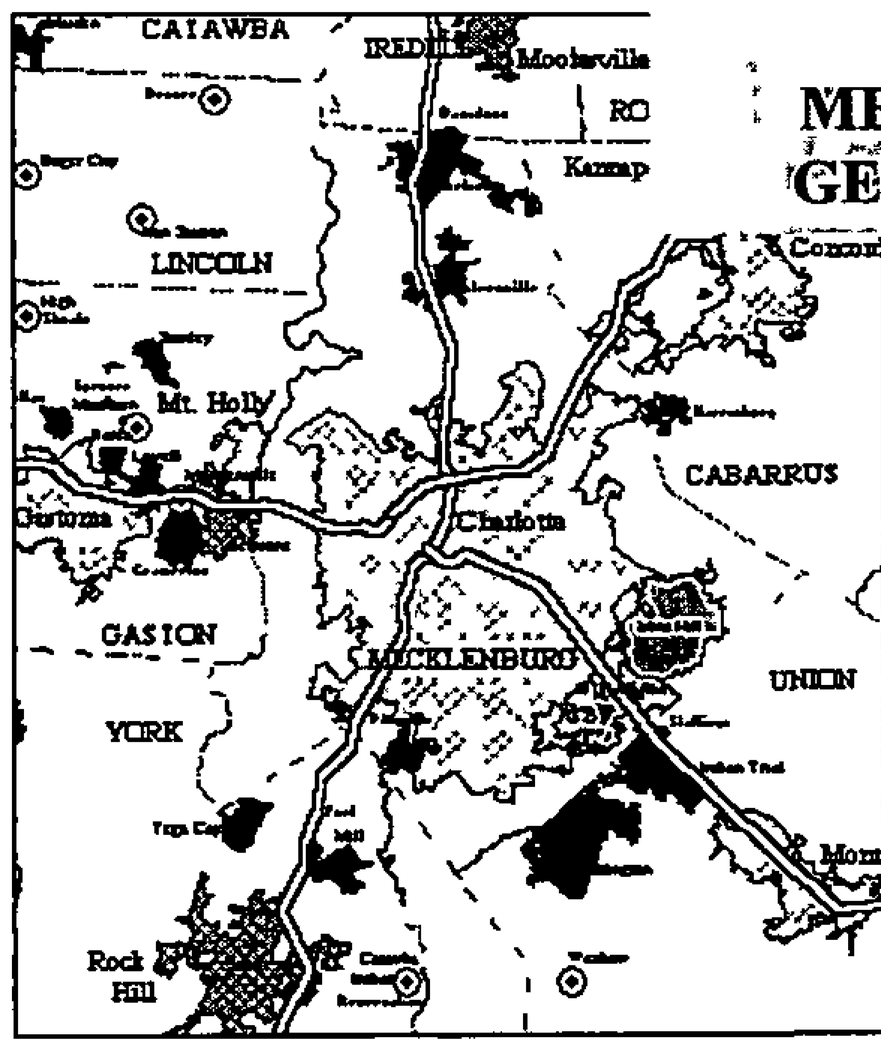
Third, Planning initiatives for Charlotte and the surrounding areas are shared The Metropolitan Centers and Corridors strategy is explained, a Charlotte-Mecklenburg Development Vision is offered, and the strategic view of Charlotte-Mecklenburg as a central city of a regional city is presented

Fourth, the building blocks of the local development strategy are examined The geographic character of the local community is reviewed and a future development scenario for Charlotte-Mecklenburg is presented

Fifth, a development future for the 346 square mile urban center of Charlotte-Mecklenburg is proposed Recommendations to address key issues such as Development Diversity, Housing Mix, Mobility and Land Use, Competitive Business Locations, Quality of Life features, and Infrastructure Financing are presented

Finally, concluding remarks are offered on the challenges of change A summary is provided of important strategies and initiatives necessary to successfully address the future

# EVOLUTION OF A METROPOLITAN CITY: GEOGRAPHIC SETTING




**Continuing and rapid change across the Metropolitan Area**

Growth is occurring in a low-density, decentralizing development pattern over an area comprised of 30 cities within 8 counties, and spreading across two states

# PICTURE OF THE FUTURE

*Continuing and rapid change across the Metropolitan Area*

## THE GEOGRAPHIC SETTING

### *EVOLUTION OF A METROPOLITAN CITY.*

Historically , the pattern of development in the region was a clustering of smaller towns together with more densely developed rural areas surrounding Charlotte Charlotte's population of 134,052 was contained within a 30 square mile area in 1950 At that time, the seven county metropolitan population was 588,170

Over the past 45 years, growth has dramatically altered this picture Today, we are a metropolitan area of over 1 2 million people Charlotte now has a population of 443,600 which is contained within a 209 square mile area Mecklenburg has also become a job-rich area with over 100,000 people commuting into Mecklenburg County daily for their employment

The predominant development has been suburban in character Over the past 4 1/2 decades, Charlotte's density has dropped from 4,468 to 2,122 people per square mile Annexation has enabled Charlotte to respond to the forces of decentralization common to American cities

Beginning in 1980, the commuting patterns of the Metropolitan Area began to change dramatically This reflected a new ring of suburbanization between Charlotte and the 20-mile ring cities These cities and their environs began to grow at an accelerated pace This now provides a Metropolitan economic system and urban area comprised of thirty cities within eight counties, and spreading over two states

The interdependence of suburbs and center cities is highlighted by 1990 household income data There is a correlation between growing incomes for cities and their suburbs and declining incomes for cities and their suburbs - " in the high growth set of metropolitan areas no suburbs experienced income growth without corresponding growth in their central city This also means that no central city in this high growth sample experienced income growth in the absence of suburban (income) growth " - "*Interdependence of Suburbs and Cities* Nation's Cities Weekly, March 8, 1993

Today, the Charlotte area is a solid economic performer among the 39 metropolitan areas with a population of 1 million or more which together comprise nearly 1/2 of the U S population Additionally, it is noted that 54% of the U S population lives within 650 miles of Charlotte This is an easy one day drive or 90 minute flight

*WHAT MAKES A HEALTHY COMMUNITY ?*

Over the next 25 years this area will undergo continuing and rapid change There is a need to picture our expectations for this future The question before us What will make Charlotte-Mecklenburg a healthy Community in the 21st century?

Some elements of the answer are suggested by the following goals

* ***Urban and Suburban Growth*** Have a compact and higher density development pattern that utilizes the market niche strengths of ore urban types of development within the broader suburban development pattern

* ***Planning Capacity*** *Have a cooperative coordinated and strategic planning capability at the city county and metropolitan levels that focuses on the problems and opportunities of a maturing metropolitan area*

* ***Housing Marketplace*** Bring together the best qualities of urban and suburban market strengths and preferences *An adequate supply of competitively priced middle-income housing is important*

* ***Positive Business Climate.*** Be a good place to do business, have a well-educated and well-paid workforce, and hold a competitive economic position within the region as well as globally

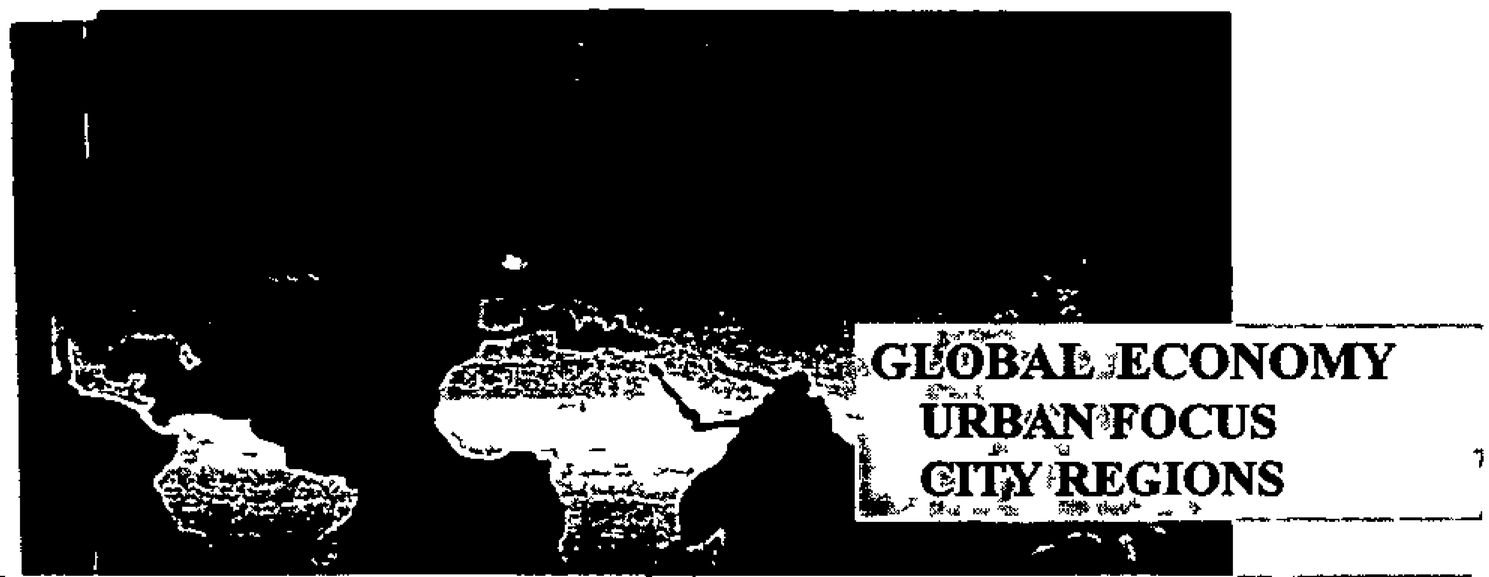
* ***Livability.*** Have a high quality natural environment, a low rate of crime and a well designed community and neighborhood fabric *Mixed-use and diverse housing pedestrian friendly atmosphere high perception of community safety and well landscaped settings are important ingredients for desirable urban livability*

* ***Transportation Choice.*** Have a transportation network that offers the broadest choice for movement of people and goods

* ***Infrastructure Investment*** Deliver the most cost effective infrastructure network and facilities linked to a long-term development vision and finance strategy

***"...Goals To Make A Community Healthy..."***

80% or more of the goods and services produced in urban economies embrace cities and their suburban regions




**KEYS TO SUCCESS**

- Position to compete globally
- Bring city and suburbs together - one marketplace
- Educate to meet the needs of economy
- Avoid or undo concentration of poverty
- Each city must find its niche
- Forge partnerships

# ECONOMIC AND URBAN CONTEXT

## *GLOBAL ECONOMIC TREND.*

The world is becoming a single economic network Significant regional changes are occurring as economies and people are brought into the global network

*The 1992 European - North American State- of- the- Cities Report*

"Eighty percent or more of the goods and services in the European Community and North America are produced in the urban economies that embrace cities and their suburban regions "

*these 'city regions are the real arenas for global economic competition into the 21st century*

### " KEYS TO URBAN SUCCESS...

***Cities must:***

Aggressively *position themselves* to compete economically in a global economy ,

Find ways *to bring city and suburb together* one labor market and one economy, competing against similar labor markets and urban economies ,

*Education and train* to meet the demands of the new economy ,

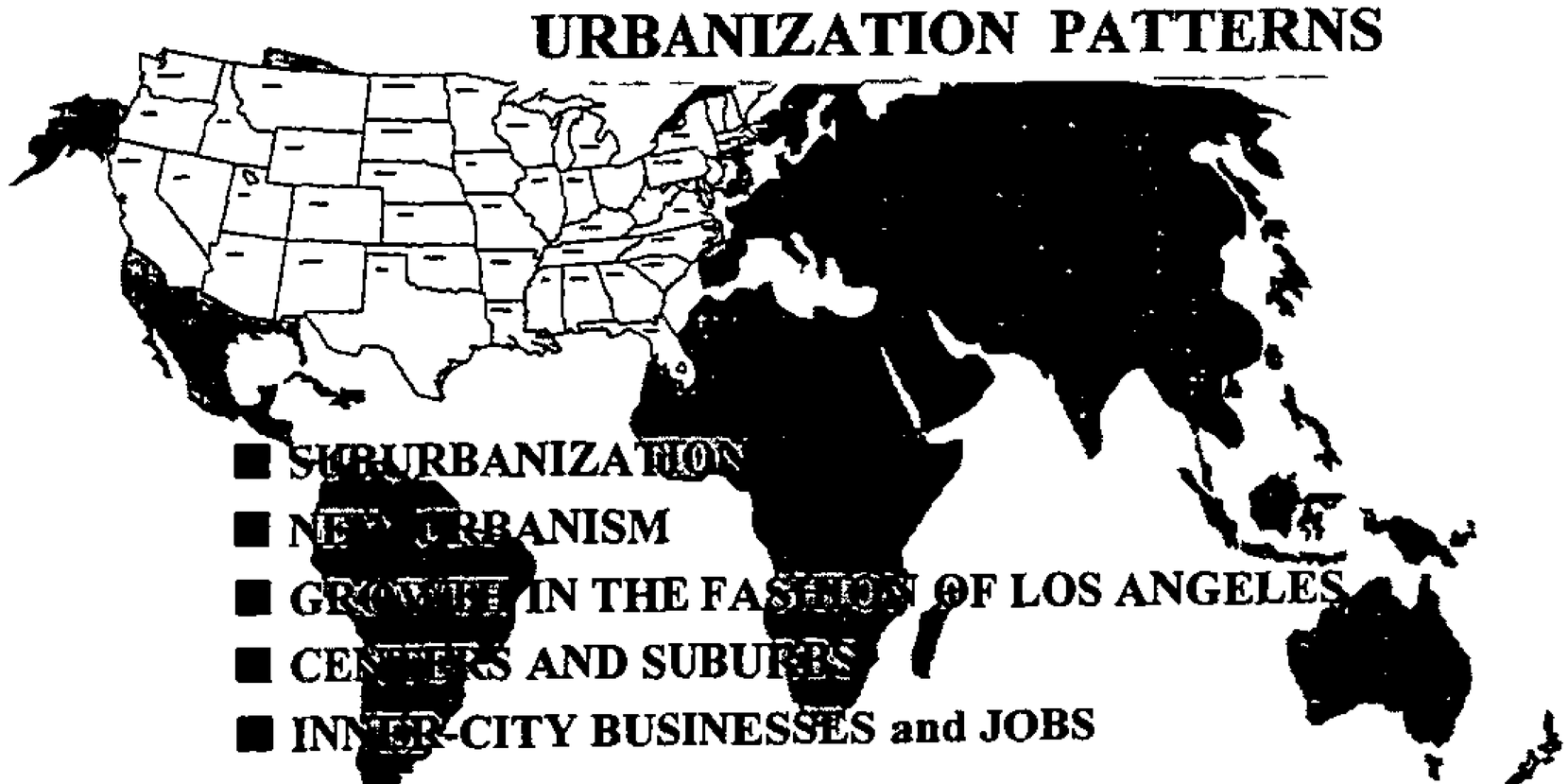
*Avoid or undo* decisions that concentrate poverty in specific neighborhoods ,

Create new jobs by *finding their niche* in the global economy through taking advantage of their strengths ,

*Forge new partnerships* across political boundaries, bureaucracies, and public and private interests ,

This report noted that communities were working at " *Restoring the sense of community* and *emphasis has shifted away from solutions that depend upon bureaucratic control*

## URBANIZATION PATTERNS



- SUBURBANIZATION
- NEW URBANISM
- GROWTH IN THE FASHION OF LOS ANGELES
- CENTERS AND SUBURBS
- INNER-CITY BUSINESSES and JOBS

75% of U S population lives in urban areas Since 1950, growth has occurred in a low density, sprawling pattern

## Suburbanization

New Vision For Metropolitan America, A. Downs, 1994.

UNLIMITED LOW-DENSITY SPRAWL

A VISION SUCCESSFULLY REALISED

- Detached single family homes on large lots
- Travel by private automobile
- Workplace shift to suburban parks
- Fragmented controls over land use
- New communities free from signs of poverty

Rutgers University
New Jersey would spend $1 3 billion more for low density sprawl over more compact development.

*URBANIZATION PATTERNS:*

Trends and Possibilities

**Low - density suburban pattern.**

In 1990, seventy-five percent of the U S population resided in urban areas Since 1950, growth has occurred in a low-density, sprawling suburban pattern This has changed the face of America

*New Visions for Metropolitan America Downs 1994*

Downs portrays the predominant development pattern in America over the past four decades as unlimited low-density sprawl and suggests consideration of an option limited-spread , mixed density growth

**Unlimited low-density sprawl**

"For half a century America has had one dominant vision of how metropolitan areas should grow and develop It is best described as unlimited low-density sprawl Most metropolitan areas have successfully realized this vision "

Downs highlights five elements of this vision

* Dominance of detached single-family homes on spacious lots
* Primary mode of travel by private automobiles
* Shift of work places to low-rise workplaces with free parking
* Multiplicity of local governments with their own land use control
* New communities free from the signs of poverty

The problems of the Low-Density Vision are highlighted as excessive travel, lack of affordable housing, lack of consensus on how to pay high infrastructure costs, and no effective means to site undesirable land uses In the short term, however, low density residential sprawl offers lower land costs, lower property taxes and more house for the consumer dollar

> A Rutgers University Study For New Jersey, " pegged capital costs attributable to a sprawl development pattern at $1 3 billion over 20 years for roads , water , sewer , and school facilities" Additional operating and maintenance costs of $400 million also were linked to sprawl development Measured against the States plan for more compact development - American Planning Association , PAS Memo, February, 1993

## New Vision

New Vision. . . A. Downs, 1993.

LIMITED-SPREAD, MIXED DENSITY GROWTH

CLOSE TO LOW-DENSITY GROWTH BUT CALLS FOR MORE COMPACT DEVELOPMENT WITH TRANSIT FOCUS

LIMITED TO GROWTH AREAS

- RAISE AVERAGE RESIDENTIAL DENSITIES
- MIX USES TO REDUCE TOTAL TRAVEL
- REDUCE COSTS OF INFRASTRUCTURE
- MORE HOUSING AVAILABLE IN SUBURBS FOR LOW- AND MODERATE INCOME

This approach calls for clusters of higher density housing surrounded by much larger areas of low density housing. Public transit, other than rail, would be encouraged.

## New Urbanism

The Next American Metropolis. . . P. Calthrope, 1993.

NEED TO CREATE NEIGHBORHOODS RATHER THAN SUBDIVISIONS - - - NEED NEW TOWNS RATHER THAN SPRAWL - - - NEED TO INTEGRATE URBAN AND SUBURBAN.

- Organize compact, transit supporting growth
- Create pedestrian friendly spaces
- Mix uses together in complementary way
- Mix housing types, densities and cost
- Preserve natural spaces
- Use public facilities and spaces as the focus for neighborhood and towns

Principles can be applied to both new development and infill development

**Limited - Spread , Mixed - Density Growth.**

Downs describes this scenario as close to the low-density growth scenario, but notes there would be a stronger focus for growth within an urban growth boundary with most public financing of infrastructure limited to the growth area This approach also calls for clusters of higher density housing surrounded by much larger areas of low density housing Workplaces would also be spread throughout the growth area, and public transit, other than rail service, would be encouraged Finally, affordable housing would be built in new growth areas which may require reduction of regulatory barriers

Several objectives of the limited-spread, mixed-density growth were highlighted by Downs to include " raising average residential densities, reducing total travel distances, reducing the costs of providing future infrastructure, and making more housing in the suburbs available to low and moderate income households "

**New Urbanism Neo - Traditional Development.**

*The Next American Metropolis Calthorpe 1993*

Calthorpe portrays the last 20 years of sprawling growth as reaching its limit " Suburban sprawl increases pollution, saps inner-city development, and generates enormous costs, costs which must ultimately be paid by taxpayers, consumers, businesses and the environment "

He further notes " we need to start creating neighborhoods rather than subdivisions, urban quarters rather than isolated projects, and diverse communities rather than segregated master plans Quite simply, we need towns rather than sprawl New balance calls for the integration of seemingly opposing forces suburban and urban, these are the poles that must be fused in a new pattern of growth "

The following principles are suggested by Calthorpe with the footnote " they are not new, they are simply a return to the timeless goals of urbanism, in its best sense "

* Organize growth to be compact Also, encourage transit supportive development,
* Place businesses, higher density housing and civic uses close to transit stops,
* Create pedestrian-friendly streets,
* Mix housing types, densities and costs,
* Preserve natural spaces,
* Use public spaces as the focus of building orientation and neighborhood activity and
* Encourage complementary mixed-use infill and redevelopment within existing neighborhoods, and encourage it along transit corridors

# Growth in the Fashion of Los Angeles

Edge City: Life in the New Frontier. . .Garreau, 1994.

- Metropolitan areas are growing in the fashion of Los Angeles with multiple urban centers
- The means of creating wealth – our jobs – are moving to the suburbs

New edge cities are rising where there were only villages or farmland 30 years ago.

People + Services + Jobs = Economic Development in the Suburbs

Geography of Nowhere . . . Kunstler, 1993

The results of the experiment are not good news

- The challenge is to create sustainable economies and cities in which those economies can dwell.

A strong theme of Calthorpe's is the provision of " A 'walkable' environment where there are options for drive-alone auto use and comfortable means for pedestrian movement "

Today, there are many opportunities to apply design guidelines with both marketplace " best use " concepts and neighborhood or environmental preservation expectations Existing as well as new business centers, business corridors, suburban as well as urban infill, and whole new mixed use communities offer many possibilities

In "The New Urbanism" by Peter Katz ( 1994 ), it is noted that the principles of new urbanism can be applied to " both new development and infill - at a range of densities and scales and in all regions of the country "

**Growth in the Fashion of Los Angeles.**

*Edge City Life on the New Frontier Garreau 1991*

Garreau describes an emerging pattern of change on the edge of America's metropolitan areas This change has accelerated over the past thirty years " Americans are creating the biggest change in a hundred years in how we build cities Every single American city that is growing , is growing in the fashion of Los Angeles, with multiple urban cores "

He notes that people have dramatically changed " just about all our routines of working, playing and living " Further, he states " Today, we have moved our means of creating wealth, the essence of urbanism - our jobs - out to where most of us have lived and shopped for two generations That has lead to the rise of the Edge City " He uses the term Edge City " Cities because they contain all the functions a city ever has, albeit in a spread form Edge because they are a vigorous world of pioneers and immigrants, rising far from downtowns, where little save villages or farmland lay only thirty years before "

There is a simple principle demonstrated here People move to a low-density, single family areas, and then services follow, and thereafter jobs arrive together with more intensive development Two forces act in response to low density residential growth First , growing demand for public facilities causes increased economic development efforts by suburban governments Secondly, businesses seek greater proximity to their labor force which now lives in the suburbs

# Centers and Suburbs

Cities Without Suburbs. . . Rusk, 1993.

- The real city is the total metropolitan area.
- 60% of the U.S. population lives in 320 metro areas.

Only cities that have grown to include suburban expansion are the most healthy in social, economic and fiscal terms.

- Annexation has been a critical factor.

**The smaller the income gap between the city and suburbs, the greater the economic progress of the whole metro community.**

*The Geography of Nowhere Kunstler 1993*

Los Angeles represents the ultimate expression of a decentralized growth pattern Kunstler, however, notes "The results of the grand experiment are in , and the news is not good the metropolis is strangling on its own patented brand of growth " He further states " Nobody can reasonably propose how to rearrange the metropolis, or downsize it, or retrofit it in a way that would be politically acceptable at this time If Los Angeles survives as a city of any consequence, it will be in a form that we do not yet recognize "

The basic challenge for metropolitan areas is summarized by Kunstler in the following " The underlying problem that Los Angeles and the rest of the 'developed' world faces is how to fashion an economy that is not an enterprise of destruction That is , how to create sustainable economies and sustainable human habitats - cities and towns - for those economies to dwell in "

**The Real City .. Center and Suburbs.**

*Cities Without Suburbs Rusk, 1993*

Rusk begins his story with the assertion that " The real city is the total metropolitan area - city and suburb " He notes that after World War II, people still lived predominantly in inner cities However, by 1990 over 60% of the population of 320 metropolitan areas lived in suburbs By 1990 a majority of jobs were located in suburbs "

Rusk's primary observation is that those cities that have grown to include suburban expansion are the most healthy in their social, economic and fiscal conditions In short, annexation has been a critical component for a healthy city over the past 45 years

He also concludes " In highly segregated urban areas, no matter how wealthy area-wide concentrated poverty, welfare dependency, and crime compound each other, and inner cities are failing In more integrated urban areas - even where poorer area-wide poverty, dependency and crime lack critical mass, and the cities are succeeding "

In reference to the metropolitan city , Rusk's research supports the idea that " The smaller the income gap between city and suburb, the greater the economic progress for the whole metropolitan community " Thus, it is essential for both the inner city and suburban residents to appreciate the relative competitive advantage and needs of the older inner city Both win or lose together as an economic network over the long run

## Growing Inner-City Businesses and Jobs

The Competitive Advantage of Inner-City . Parker, 1994.

INNER-CITY ECONOMIC DEVELOPMENT MUST BE AN INTEGRAL PART OF A BROADER ECONOMY - NOT AN ISLAND

- Unique competitive advantages are identified.
- Business must be genuinely profitable and competitive.
- Government acts as a facilitator for private initiatives --crime, high cost of doing business, etc.
- The top talent of minority community is tapped.

Does Business Development Raises Taxes . . . APA, 1995

Business development is associated with lower residential tax rates.

- Competition within metro area as well as between areas

**Growing Inner - City Businesses and Jobs.**

*The Competitive Advantage of the Inner City Porter 1994*

Porter's position is that for inner city economic development to be successful it needs to address the following principles

* Unique existing and potential competitive advantages are identified

* Businesses must be genuinely profitable and positioned to compete

* Government must become facilitators of private sector initiatives

* Disadvantages that erode economic competitiveness - crime, environmental liabilities, and the high cost of doing business must be addressed

* The talent and commitment of the minority community must be tapped

An inner city economic development effort, Porter notes, " should view the inner city as a distinct but integral part of the regional and national economy, not an island unto itself This means networking with and harnessing the capabilities of companies in the surrounding region It also will require improved infrastructure to unclog the physical flow of goods and services into and out of inner city areas "

Another important ingredient is the elimination of **fragmentation** and overlap of effort with an emphasis on using mainstream private sector institutions Porter concludes " Government should concentrate on improving the business climate not taking leadership in business development

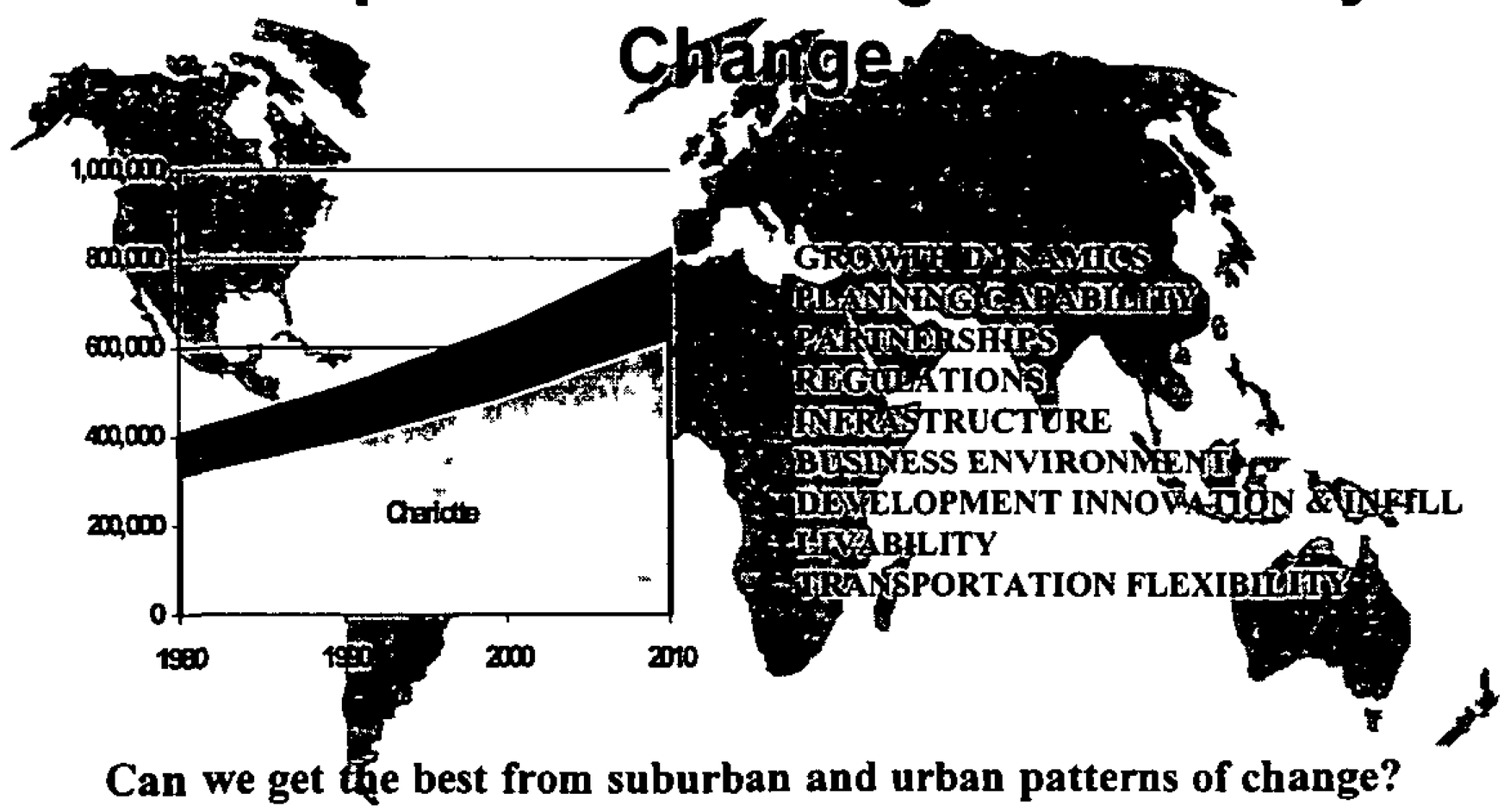
**Business Development is Associated with Lower Taxes.**

*Does Business Development Raise Taxes ?* *Public Investment, American Planning Assoc March 1995*

A study of the six-county Chicago Metropolitan area showed that " Business development (as measured by increases in assessed value) tends to be associated with lower, effective residential tax rates than would otherwise have occurred The study also concludes it is rational for local areas to seek economic development "new business and industrial developments are driving the sprawl engine " Between 1970 and 1990, " The amount of land devoted to homes and businesses increased by 47% and 74% respectively, Population growth on the other hand, only grew by 4% in the same period "

A consequence of this typical metropolitan growth pattern is acceleration of sprawl, competition among communities for business development, and shifts of business from higher tax areas to lower tax locations within a metropolitan area These losses are generally associated with areas experiencing higher concentrations of poverty and social problems

# Principles for Guiding Community Change




**Can we get the best from suburban and urban patterns of change?**

*PRINCIPLES FOR GUIDING COMMUNITY CHANGE.*

Some critical principles, that can provide an option to problems of economic decentralization and low-density sprawl are suggested by the global economic trends and urbanization patterns just reviewed

* *Define the* **growth dynamics** *and their geographic as well as demographic and economic implications over the next five, ten and twenty years*

* *Maintain a* **planning capability** *fashioned to provide vision, strategies,* and *energetic support for Charlotte-Mecklenburg as a Community of Choice for all residents to live work and find leisure pursuits*

* *Build* **partnerships** *across jurisdictions and between public and private parties for the economic success as a city-region and success of the urban center city as well as the suburban areas communities and neighborhoods*

* *Modify* **regulations** *where they create barriers for sound development innovations represented by both mixed housing types and mixed use growth and the New Urbanism design objectives for more compact urban development*

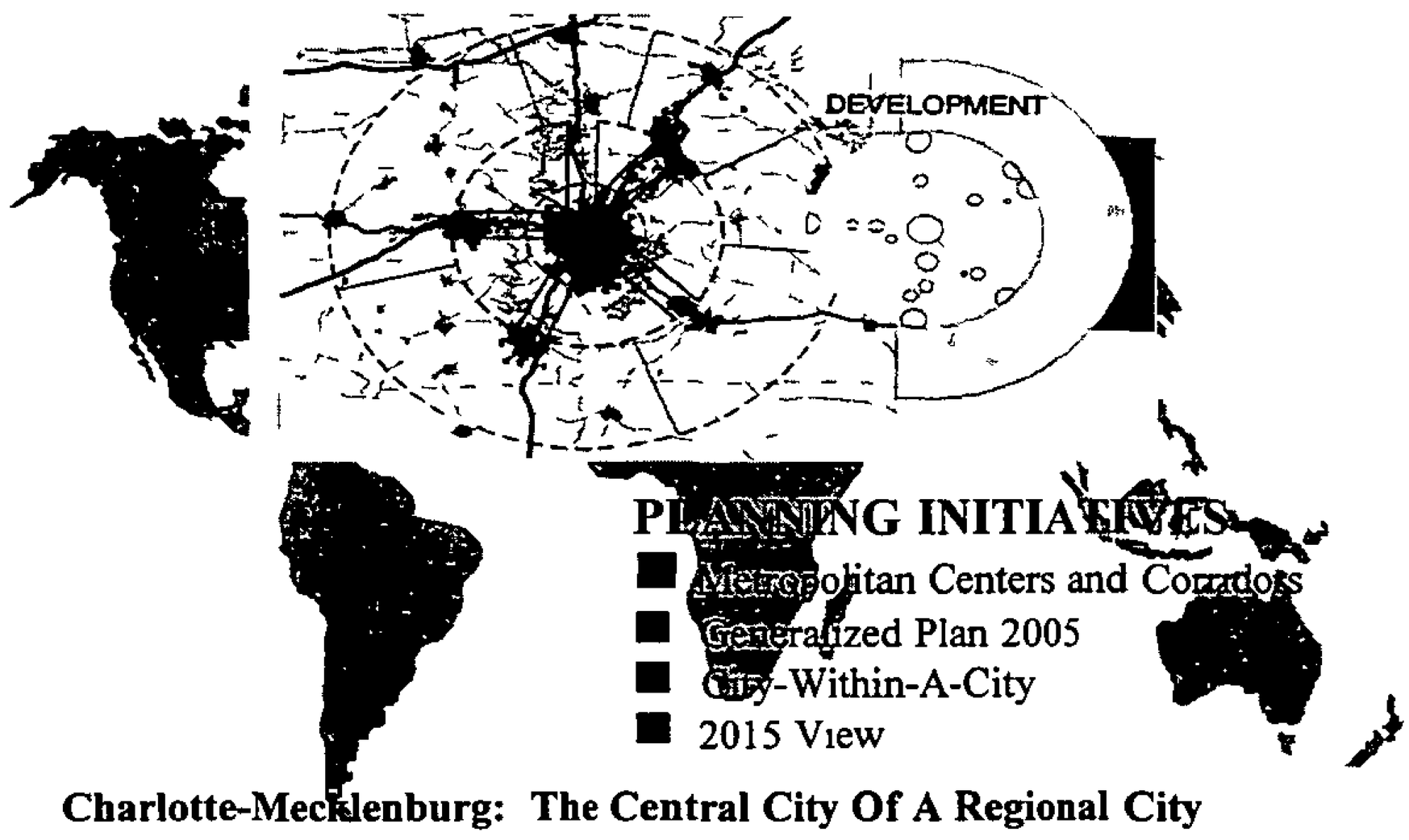
* *Maintain balanced, coordinated* **infrastructure planning and investment** *that responds to the unique characteristics of the urban City-Within-A-City area the suburban areas and the metropolitan network connections*

* *Facilitate provision of an overall* **positive business environment** *with specific attention to building a unique competitive position for the urban core businesses and job development for business corridors and cluster center city and the neighborhood services*

* *Promote* appropriate and well-designed **development innovation and infill development** *responding to the vision of Charlotte-Mecklenburg as the most urban and diverse Center City of a rapidly growing Metropolitan City*

* *Give care and attention to* **livability** *features such as safety neighborhood quality of life and natural amenities and public park space*

* *Build* **flexibility and choices** *into the transportation system as a primary ingredient for long-term economic health and livability for all residents*




**Charlotte-Mecklenburg: The Central City Of A Regional City**

# PLANNING INITIATIVES FOR CHARLOTTE AND THE METROPOLITAN AREA

## *METROPOLITAN CENTERS AND CORRIDORS.*

The evolving form of the metropolitan area is both a series of existing urban " core cities " overlaid by an expanding suburban development ring The primary core cities are linked by major radial corridors and the suburban ring is tied together laterally by the outer-belt

The radial corridor and concentric structure is a good pattern for building on the best of urban centers and suburban areas This *Metropolitan Centers and Corridors* growth theme has the following development implications

* Delivers the optimum benefits in living, working and travel conditions at the lowest new infrastructure costs Growth is guided to areas with infrastructure in place, or most economically able to be provided, it promotes a more compact urban form

* Balances new service or infrastructure investments in the suburbs with maintenance and reinvestment in urban core areas

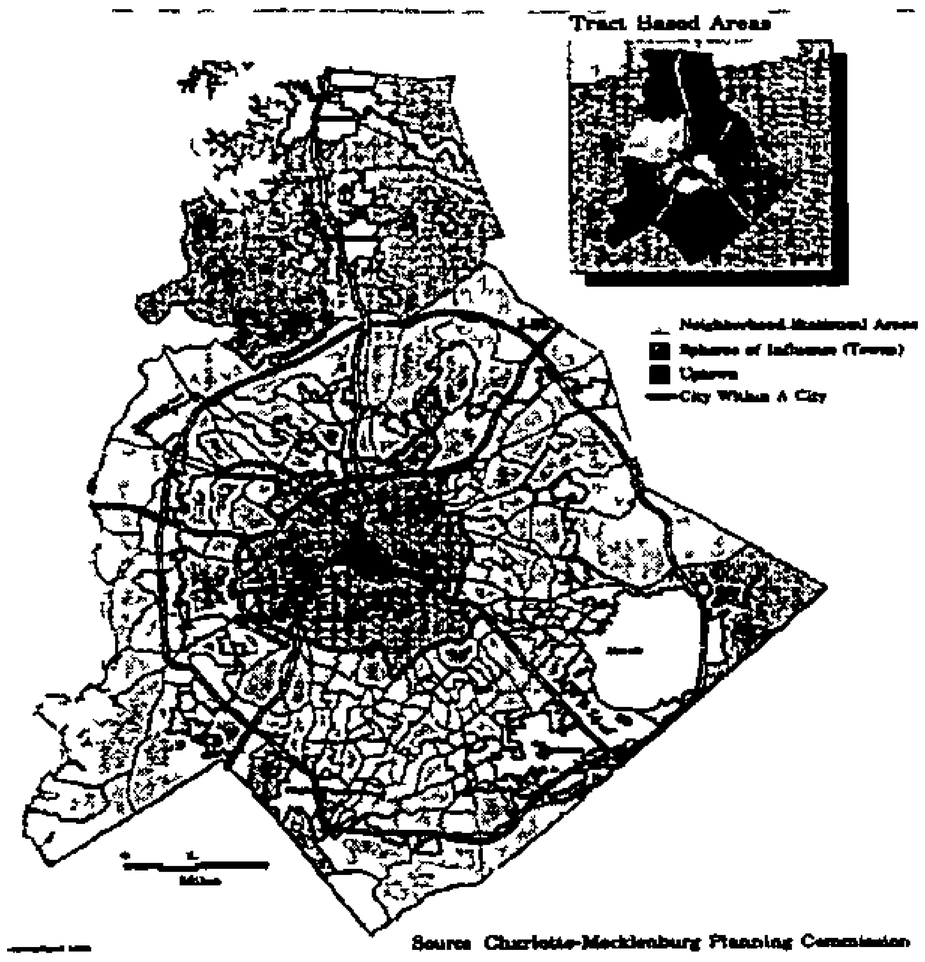
* Enables the metropolitan area to introduce transit services to address both congestion and air quality issues, and the need of lower travel costs for lower wage earners

* Makes possible development of more intensive and mixed use development, while at the same time, the preservation of established suburban areas are assured

* Facilitates economic initiatives by building toward both urban and suburban strengths that are critical to long- term global competitiveness

Focusing a portion of our growth along major corridors and within existing urban centers will avoid draining the vitality of existing cities while ensuring metropolitan, as well as community-wide accessibility to housing and civic facilities for all residents

# DEVELOPMENT SCENARIO FOR CHARLOTTE-MECKLENBURG



*CHARLOTTE - MECKLENBURG DEVELOPMENT VISION.*

Over the past ten years, here have been several initiatives for building a consensus vision of this area's future These have included the following

**2005 Generalized Land Plan.** Prepared by the Charlotte-Mecklenburg Planning Commission and adopted by the City of Charlotte and Mecklenburg County in 1985

**Charlotte-Mecklenburg Civic Index** A community stakeholders group prepared an assessment of issues and opportunities in 1988-89 Ten topics were highlighted and a report submitted to the City and County Topics included information sharing, group relations, participation, consensus building, leadership, government performance, civic education, volunteerism, community cooperation and vision

**Focus 2010 Vision Process.** Charlotte and Mecklenburg County sponsored a citizens review process in 1992-93 directed toward highlighting a vision for the community Vision statements were prepared for the following community spirit, government, education, human services, health care, environment, planning, center city, transportation, economy and jobs, crime and public safety, and entertainment, arts and tourism

Currently, the Planning Commission is initiating a look to the year 2015 for the purpose of clarifying goals, planning initiatives and actions needed to make this a healthy community in the future This effort is an extension of the 2005 Plan

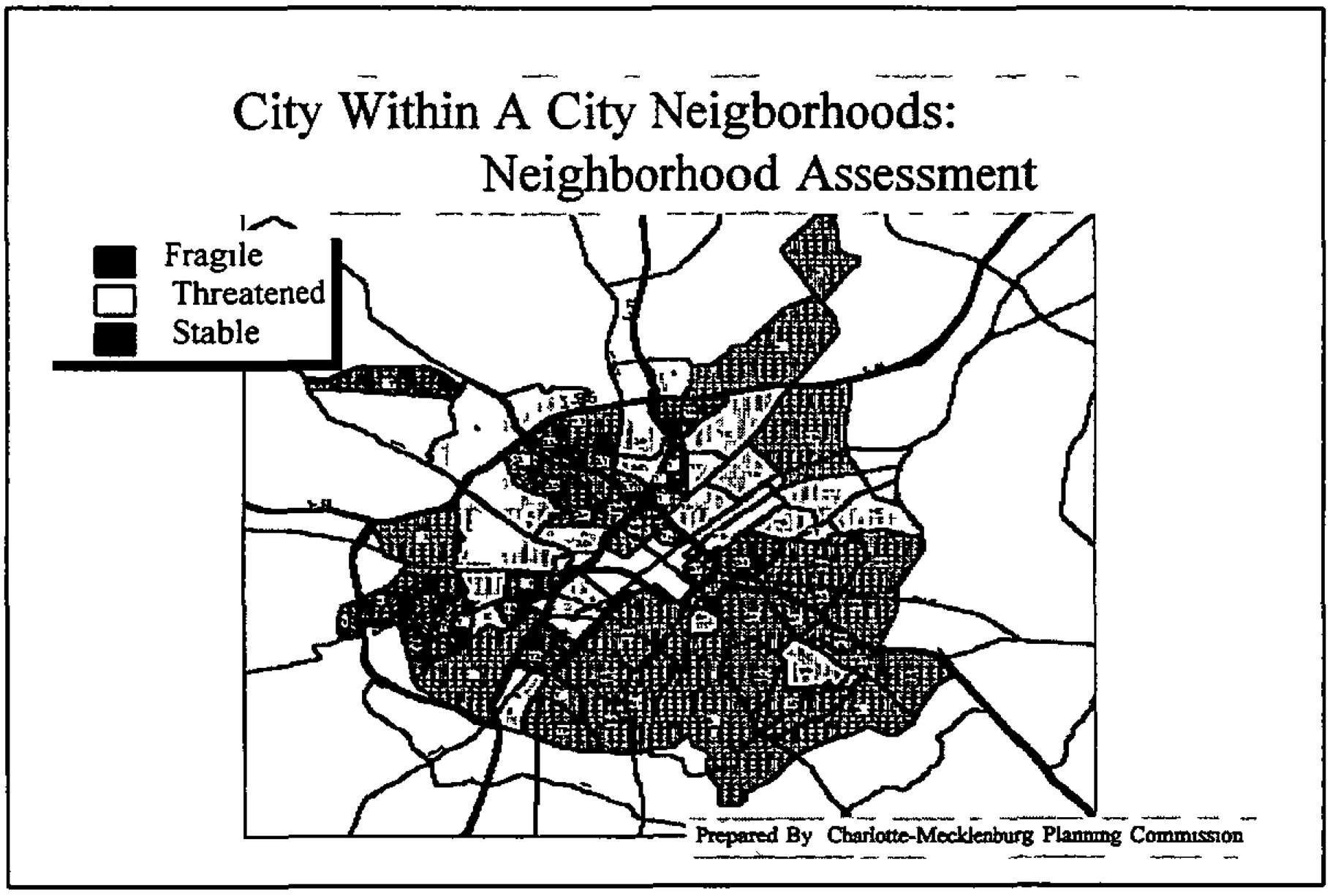
*Generalized Land Plan 2005*

Ten years ago the *Generalized Land Plan 2005* was adopted with the intention of setting a direction and providing guidelines for development The Plan offered a view of Charlotte-Mecklenburg as a developing urban center of an emerging Metropolitan City ,whereby all of this area will be developed The question was not would the area develop, but, what would its character and quality be as the Central City of a Metropolitan City The Plan was built on three basic assumption

* This would be an area of increasing urban diversity,
* It would be an area growing in regional interdependence, and
* The area would strive vigorously to integrate into the national and global economy

These strategic assumptions have proven to be correct Three specific goals were set forth by the Plan

* Establish a balanced growth pattern,
* Facilitate a more urban land use pattern, and
* Establish urban design expectations and criteria for development


City Within A City Neigborhoods:
Neighborhood Assessment
Fragile
Threatened
Stable
Prepared By Charlotte-Mecklenburg Planning Commission

The Plan also called for actions that carried out these goals Following are several examples

* Revise the Zoning Ordinance to increase development flexibility and provide standards appropriate to an urban setting ( Completed )

* Complete seven more detailed District Plans to reflect assumptions and goals ( Completed )

* Use the ten-year capital needs assessment process to prepare infrastructure investment strategies (Ongoing)

* Use neighborhoods as the building blocks for community livability ( Extensive neighborhood based planning process carried out)

* Establish regional planning initiatives ( Centers and Corridors Land Use Vision developed)

The Plan set out new development and infill development guidelines, and also called for strong attention to reinvestment to address employment and neighborhood issues of the inner-city The heart of the 2005 Plan is contained in the specific Land Use Strategies Section including District Plan proposals This provides both illustrative, general types of development together with an accompanying infrastructure investment strategy

There are seven districts including an urban central city area, five suburban ring areas, and a North Mecklenburg area. The Central City District strategies set the stage for the current City-Within-A-City initiative

*City-Within-A-City*

According to the 1990 Census, approximately 145,663 people live within the 60 square mile center of Charlotte Seventy-three neighborhoods together with the Uptown comprise the majority of this area While there are healthy areas, this area contains the region's highest concentration of social, economic and physical problems In response, a City-Within-A-City initiative is underway that addresses the following

* Building the capacity of neighborhood organizations to respond to problems and opportunities

* Facilitating economic development focusing on business development, upgrading business corridors, Uptown development, and connecting people with jobs

* Providing physical improvements including infrastructure, community appearance, and neighborhood facilities

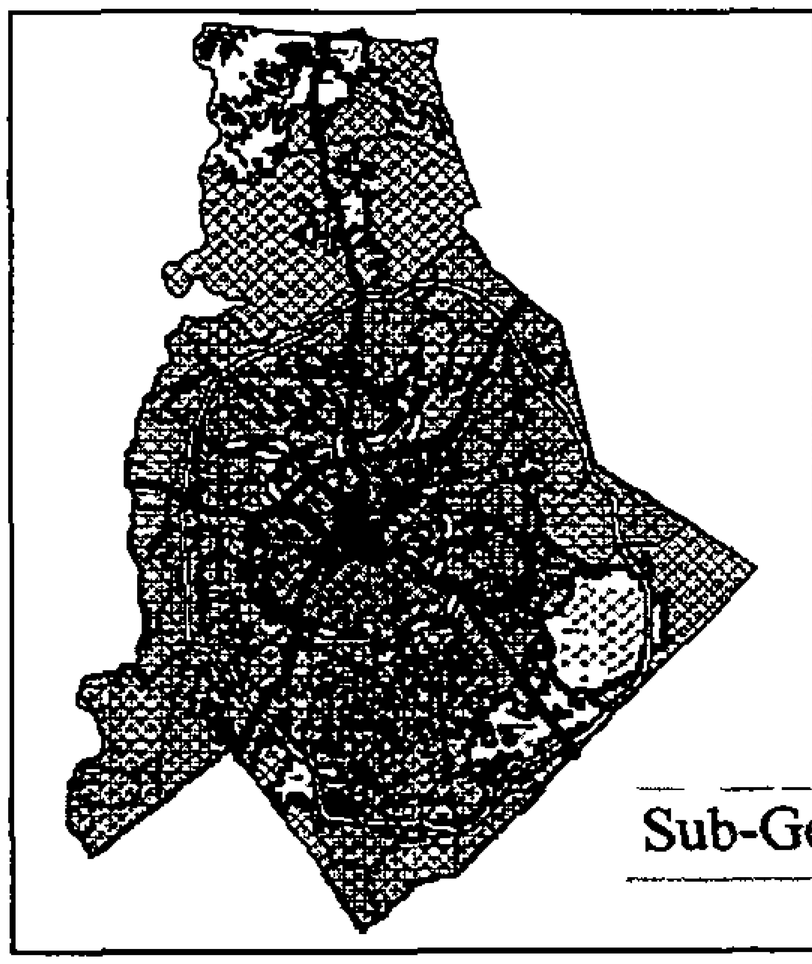
* Supporting initiatives for housing improvement, preservation and homeownership

* Implementation of the Community Safety Plan with emphasis on Community - Based Policing

* Improving educational levels and job skills

These efforts are a community partnership undertaking intended to provide a healthy living, working and leisure setting for residents in the inner city, as well as to offer this area as a competitive location within the region

# Charlotte-Mecklenburg



Sub-Geographies

*The Next Twenty Years 2015 View*

Charlotte-Mecklenburg is going through an exciting and challenging transformation A common theme in people's desire for this change is *that we sustain economic growth and an excellent quality of life over the course of time* In the mid 1990's there are a variety of challenges to our long-term health Community safety, and cost of public services and facilities are currently significant issues The next ten years will also see serious attention to the following

**Economic Development.** The need for a job and business development strategy that counters the natural suburban decentralization and urban displacement trends of metropolitan development

**Land Use and Transportation.** The need to facilitate more intensive and mixed-use development together with transit possibilities This can enhance the economically competitive position of Charlotte-Mecklenburg as a place to do business, and have access to jobs for all residents

**Neighborhoods.** The need to maintain , revitalize or protect neighborhoods that are under adverse pressures, particularly low and middle income neighborhoods This can maintain the community as a place to live and work for all residents

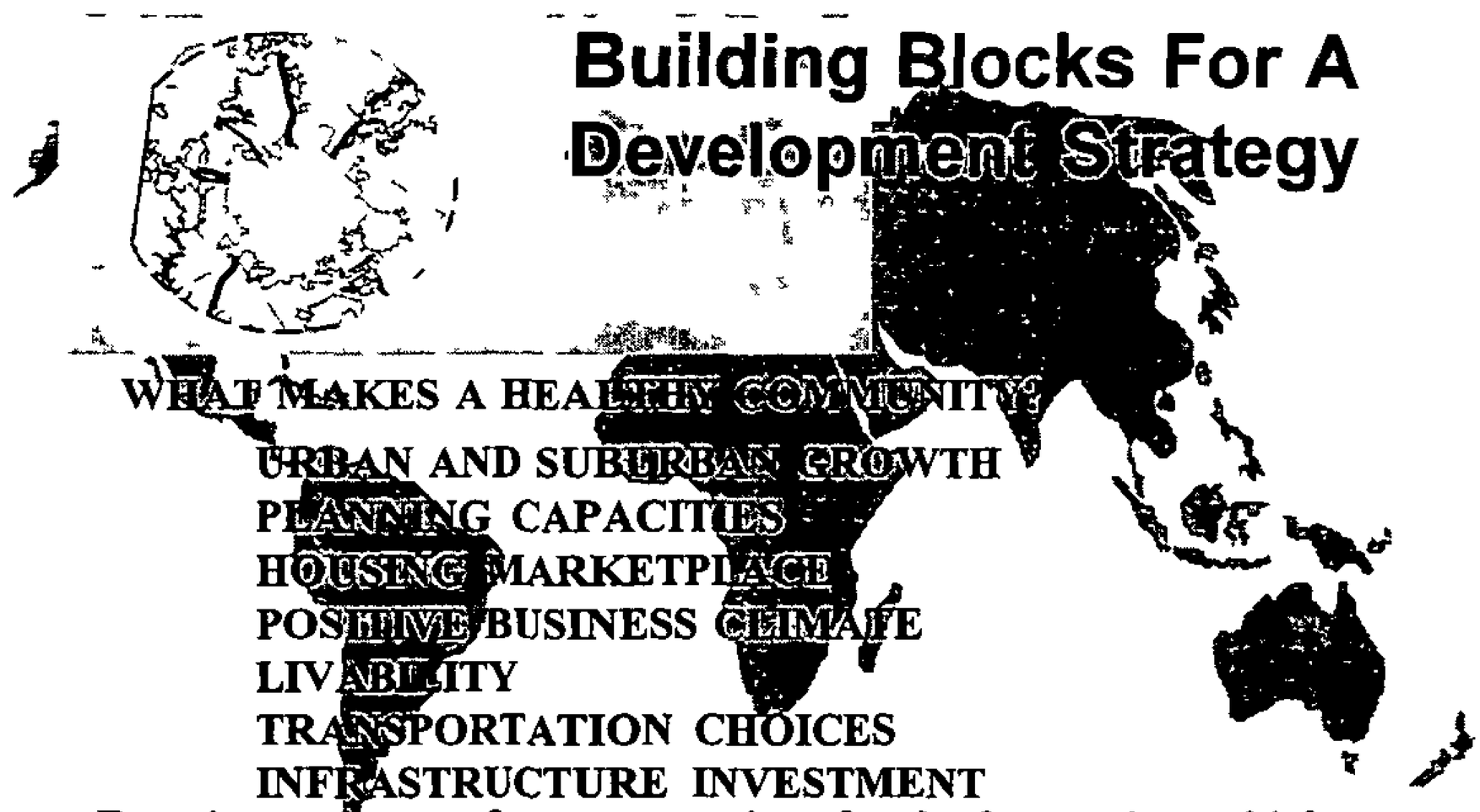
**Design.** The need for well designed and maintained neighborhoods, public areas and street corridors, and business areas This can build a unique sense of civic identity as well as a competitive edge as a place to live, work and find leisure pursuits

**Region.** The need for intergovernmental partnerships to address issues that transcend political jurisdiction or mold a common interest on an urban agenda This can enable meeting problems or opportunities that otherwise are beyond individual capabilities

Looking to the year 2015 suggests changes ahead will accelerate and result in more complexity Planning and strategic actions can enable both having a vision and attaining it

***STRATEGIC VIEW: THE CENTRAL CITY OF A REGIONAL CITY.***

When seen in the framework of the emerging forty-mile Region and the twenty-mile Metropolitan area , Charlotte-Mecklenburg is now the Central City area The strategic question is What development implications will this carry over the next twenty years? It will be critical to this area's future to understand the consequences of national trends, and to picture a desired future What we have in common with other metropolitan areas, together with our unique attributes, form the drivers of change and development ahead



# Building Blocks For A Development Strategy

**WHAT MAKES A HEALTHY COMMUNITY?**

**URBAN AND SUBURBAN GROWTH**
**PLANNING CAPACITIES**
**HOUSING MARKETPLACE**
**POSITIVE BUSINESS CLIMATE**
**LIVABILITY**
**TRANSPORTATION CHOICES**
**INFRASTRUCTURE INVESTMENT**

**Drawing a picture of our expectations for the future gives a higher level of certainty to our vision.**

## BUILDING BLOCKS FOR A DEVELOPMENT STRATEGY

### *GEOGRAPHIC CHARACTERISTICS*

A successful development strategy will need to have as its foundation in a geography that people can understand and for which they can feel a relationship Common characteristics, identities and interests suggest the following areas as the building blocks for a development strategy

* The five-mile radius urban core area including City-Within-A-City The essential elements are Neighborhoods , Business Clusters and Corridors, and Uptown as defined by the term Center City

* The maturing Suburban Ring-City Area including the five to ten mile ring The essential elements also are Neighborhoods, and Business Clusters and Corridors

* A combination of the urban core and suburban ring essentially constitutes the 346 square mile City of Charlotte expanded to the Sphere of Influence, today Charlotte comprises 209 square miles

* The Metropolitan ten to twenty mile suburban ring area The essential elements are all the outlying cities and their suburban areas Significant features of this area are the twenty mile ring cities

* The Metropolitan Area as a composite of its parts, and whereby, the whole is more than the sum of its parts in a national and global context

**Advantages**

The advantages of this approach to defining the area include the following

* A future vision is possible that is inclusive of urban and suburban strengths and assets

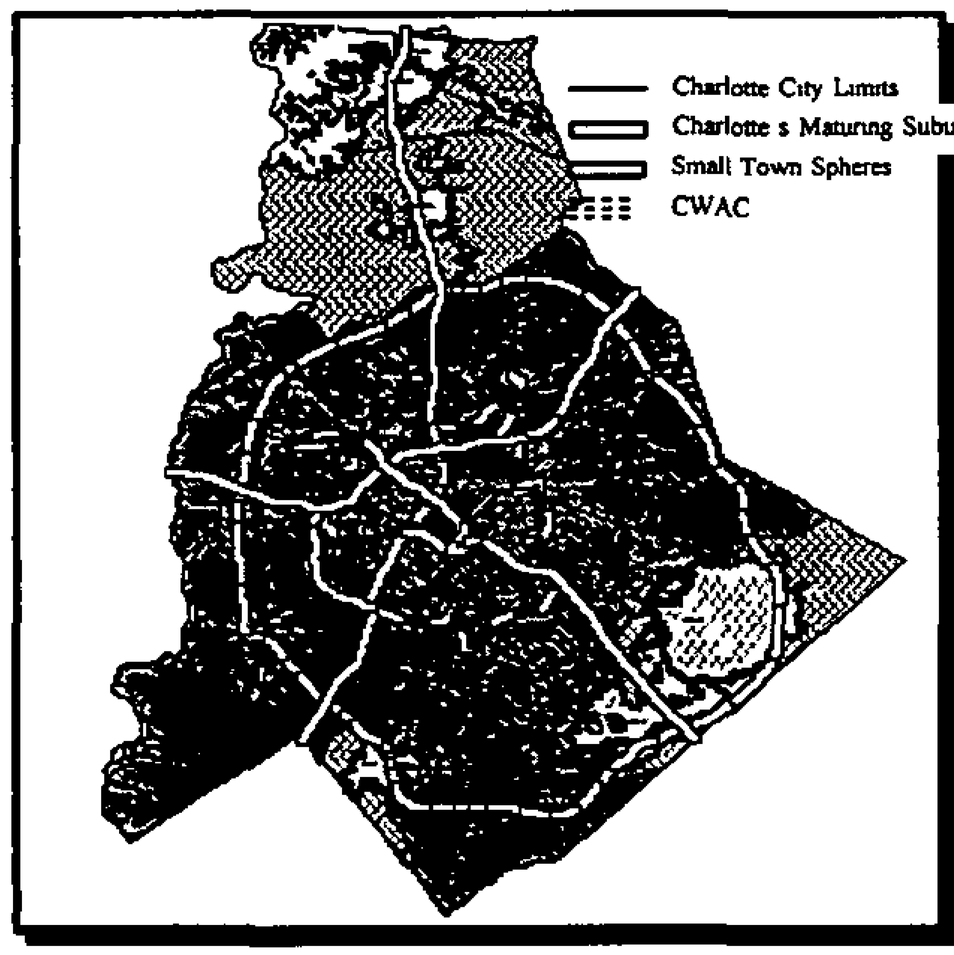
* City and suburb can be linked together and not be seen as unrelated

* Multiple jurisdictions ( political and agency) can find common ground in a shared vision that enables balancing goals and priorities, coordinating service delivery and where appropriate, consolidating

* A community and neighborhood orientation for delivery of services and investment in infrastructure can be facilitated

* A sense of what it takes for all residents to be successful in a competitive economic setting is created

# DEVELOPMENT SCENARIO FOR CHARLOTTE-MECKLENBURG




Early in the 21st Century all of Mecklenburg will be committed to development and be comprised of a very diverse population

*MECKLENBURG DEVELOPMENT SCENARIO*

Early in the 21st Century, Mecklenburg will be completely developed There will be no unincorporated area and cities outside Mecklenburg will abut the county boundary

Over time, Mecklenburg will become increasing diverse in both its demographic features and urban structure Communities and neighborhoods will offer both choice and the best in livability for all residents

Mecklenburg will be a location of choice within the region for business and jobs It will maintain a significant proportion of manufacturing businesses and jobs within the region, while continuing as a service and distribution center

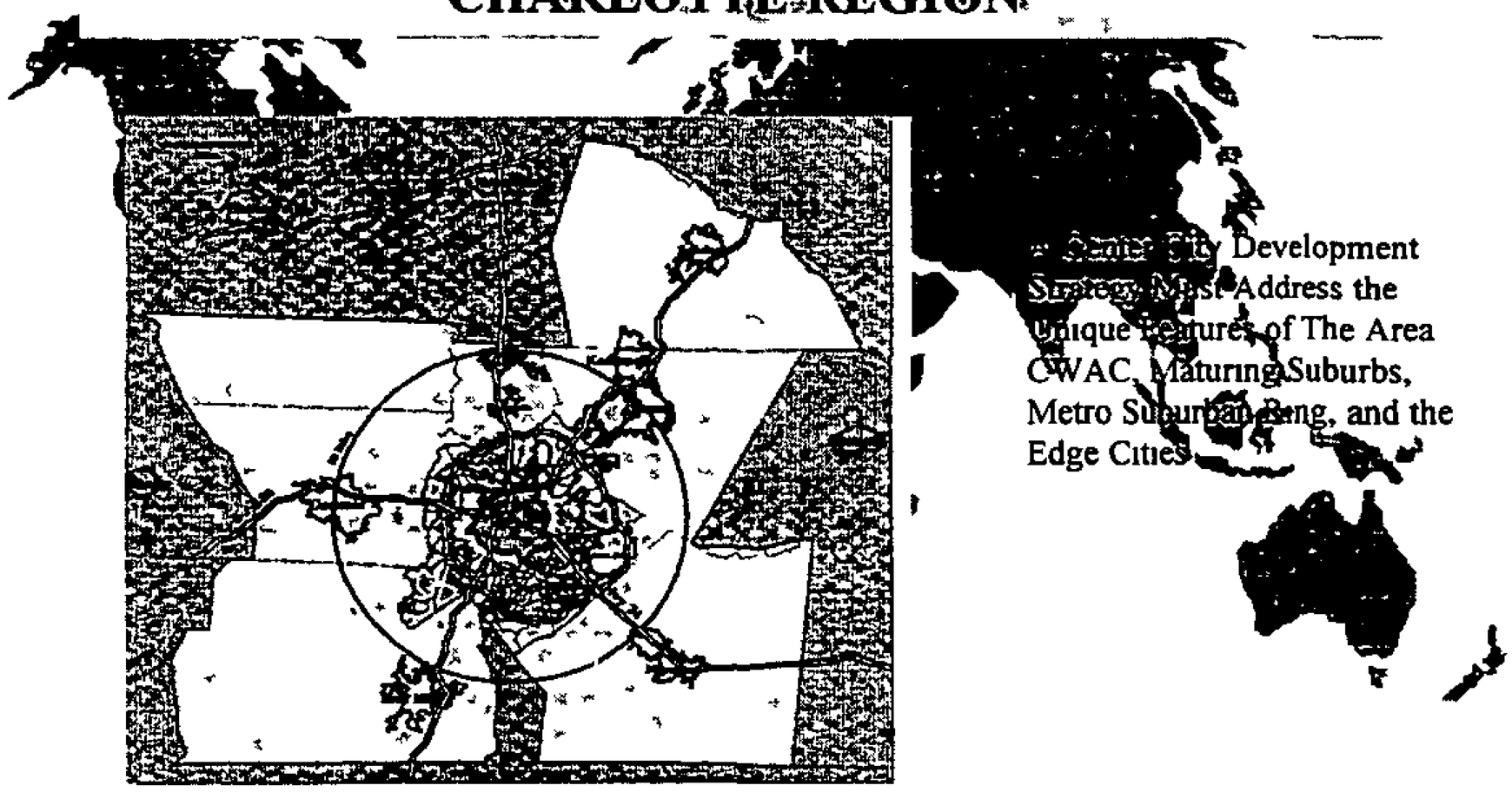
There will be an appropriate balance in services and facilities, and they will be fully coordinated to provide the best value at the least cost

The private sector will provide leadership in addressing issues of growth and change

In the public sector, government will be streamlined, overlap will be eliminated and its role will be focused on facilitation of private initiatives and providing infrastructure as a platform for economic vitality

Long-term health will depend on Infrastructure Investment A critical element for positive change is creation of an intergovernmental process that results in a Balanced, Coordinated Investment in Infrastructure Networks and Facilities

# 346 SQUARE MILE URBAN CENTER WITHIN THE CHARLOTTE REGION



- Center City Development Strategy Must Address the Unique Features of The Area CWAC, Maturing Suburbs, Metro Suburban Ring, and the Edge Cities

# DEVELOPMENT OF A 346 SQUARE MILE URBAN CENTER

Charlotte expanded to its Sphere of Influence boundary will cover a 346 square mile area and represent an area with both urban and suburban character

## *DEVELOPMENT DIVERSITY.*

Charlotte-Mecklenburg is experiencing both suburban decentralization and more urban patterns of infill development Growth over the next 20 years will likely depend on more urban and mixed-use development forms in response to higher land costs, changing population characteristics and competitive advantages for business and job development There is some question about forecasting population, households and jobs due to the dynamic nature of metropolitan changes ahead

The land use pattern will respond to growth demands represented in the following forecasts

*Population for Mecklenburg will increase from 578 000 in 1995 to 770 000 by 2015*

This is an addition of 192,000 people reflects a slowing rate of growth after the year 2000

*Households for Mecklenburg will increase from 200 000 in 1995 to 296,150 by 2015*
This is an addition of 96,150 households which reflects the slower population growth

Eighty percent of this growth is assumed for Charlotte This results in an increase of 153,600 people and 76,920 Households

These forecasts are lower than previously assumed with an 815,000 population and a 314,00 household totals for the year 2015 With the dynamic changes taking place within the Region, actual changes will be a function of localized conditions

Present development trends suggest a predominantly suburban market development with some urban scale development keyed to developing market niches for infill and new projects The post 2000 period will likely see an accelerating rate of population and household growth both outside Charlotte and beyond Mecklenburg This will likely be accompanied by a slowing of the growth within Mecklenburg

## *HOUSING MIX.*

While household growth creates a demand for a new housing, demographic change produces a need for a broader mix in housing style and types The detached single-family house on a large lot will remain popular However, there will be a growing market niche for smaller lot and attached single-family homes It is also likely that 20 to 25 percent of new construction will be multi-family Greater flexibility in locating higher density single-family development is needed The base density of four units per acre should be considered the minimum standard

Housing for low and middle income households will become a larger issue Currently, Charlotte has a considerable middle income group ( 37% of households) and a good stock of housing in middle income neighborhoods This asset needs to be preserved Cities that lose there middle income population and stable neighborhoods are the ones in trouble today

### *MOBILITY AND LAND USE.*

Transportation investment is important to the overall health of the City Connecting land use and transportation objectives can provide a sound basis for decisions shaping the future

* Reduce auto trip length and demand by providing for pedestrian and bike facilities as well as mixing uses
* Match transportation investments to the development context - urban or suburban
* Make provision for transit services as a long-term mobility option and a short-term reality for connecting lower income people to jobs

### *COMPETITIVE BUSINESS LOCATIONS.*

The estimated 1995 employment for Mecklenburg is 396,000 Forecasts call for an increase to 608,000 by the year 2015 This increase of over 200,000 jobs will depend upon the competitive position of Charlotte - Mecklenburg as outlying areas increase their location advantage

Economic development initiatives, particularly infrastructure investment, that are keyed to specific location advantage will be crucial to business and job growth Examples of locations include the following

* *Major Regional Business Corridor*
* *Local Business Corridors*
* *Uptown - Center City Area*
* *South Park Area*
* *Research Park Area*
* *Airport Area*

### *QUALITY OF LIFE FEATURES*

The health of a community is often defined by quality of life measures - an areas natural beauty, its open spaces and parks, sense of security and freedom from crime, and the aesthetic character of the community's streets and building The livability of both urban and suburban areas depends upon provision for quality of life features

The Neighborhoods are also critical elements of communities livability Inner-city and suburban neighborhoods require monitoring and attention as growth and decline ebb and flow over time

To better understand the problems, needs, and capacity of neighborhoods, the Planning Commission has undertaken a project to assess them This assessment is in two parts

**Neighborhood Assessment I** ( CWAC completed ) The Assessment Report ( 1994 ) profiles conditions of 73 residential neighborhoods Based upon social, economic, infrastructure and community appearance conditions, 21 neighborhoods were rated Fragile, 22 were as rated Threatened neighborhoods, and 30 were rated as Stable neighborhoods

**Neighborhood Assessment II** Approximately 100 suburban area neighborhoods are being assessed relative to social, economic, infrastructure and community appearance features This suburban area includes a substantial inventory of middle-income neighborhoods The protection of these neighborhoods will provide an important strength for the city's vitality

***FINANCING INFRASTRUCTURE.***

The multiplicity of jurisdictions generating infrastructure needs in response to single market segments creates a priority setting problem when the available revenues are less than the total demand Since we are in a growth cycle and experiencing problems of aging infrastructure, it appears this problem of a gap between needs and resources will widen while conflicts over priorities increases

There is the need for an intergovernmental process that results in a balanced, coordinated investment in infrastructure networks and facilities

* Strengthen the Planning foundation for the *Ten Year Needs Assessment Procedure*

* Establish a - *Clearinghouse for Financing Strategies* Broad agreements would be reached on the methods and means for financing community infrastructure,

* Improve Inter-jurisdictional communication in the preparation of *Funded Capital Improvement Programs*

* Establish a mechanism for assessing and facilitating *Joint use of facilities* and

* Coordinate financing priorities and strategies among City and County Governments

CHALLENGE OF CHANGE
OPPORTUNITIES TO POSITION
CHARLOTTE-MECKLENBURG AS A STRONG
CENTRAL AREA OF THE EMERGING REGIONAL CITY
ECONOMIC DEVELOPMENT ■ INFRASTRUCTURE ■ PLANNING
CAPACITY ■ QUALITY OF LIFE ■ COMPACT DEVELOPMENT

## CHALLENGE OF CHANGE

Change for the Charlotte Region is inevitable The challenge is to successfully use opportunities and address problems of a growing metropolitan area. This area is both duplicating trends of other metropolitan areas (Low-density sprawl and decentralization) and pursuing development innovation ( Physical, social and fiscal health of the central city)

The 1990's are the beginning of a new era of change - more rapid population growth in areas surrounding Mecklenburg and intensification of economic development initiatives within the region outside Mecklenburg The competitive position of Charlotte as a place to live, do business and find a job will undergo increasing stress Specific focus area strategies and initiatives will be important including

* Economic development positioning, workforce preparedness and job placement within an increasingly diverse central city and competitive regional framework

* Infrastructure planning and finance as the platform for livability and economic vitality

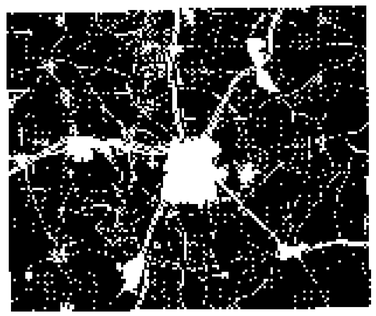
* Planning capacity necessary for maintaining a competitive edge in community and neighborhood development and stabilization or revitalization

* Quality of life features such as air and water quality, community safety, design character and attractiveness, and amenities like open space, trees and parks

* More compact development pattern with opportunities for mixed use development, diversity in housing, and broader choice in transportation methods

Growth in Mecklenburg has contributed toward this area's strength with a strong employment base, broad tax base, high bond rating and fiscal health, and a strong middle income household group The decade ahead offers opportunities to position Charlotte-Mecklenburg as a strong center city of the emerging regional city of the 21st century

*Notes:*



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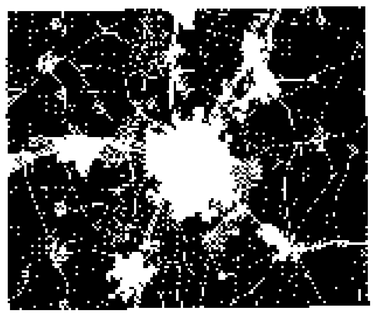

Metro Go ma on

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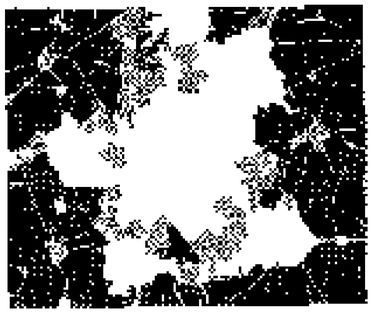
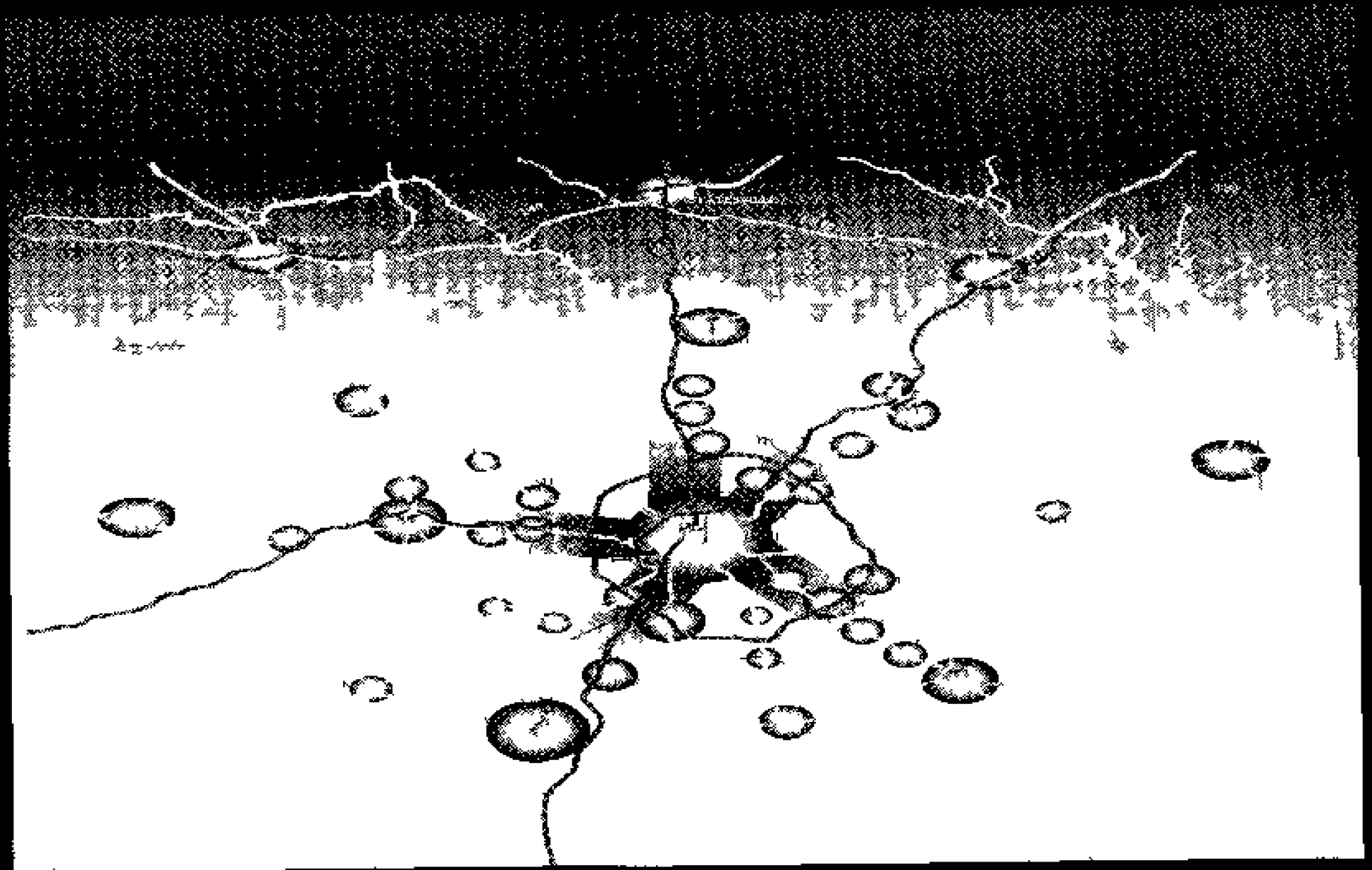


Metro City



## As The Metro Grows

There is a need to establish a land use strategy which will optimize regional potential. The goal is to maximize the value of existing and future development in relationship to the cost of transportation infrastructure and services. The radial, corridor, and concentric structure of the Greater Metropolitan area is an ideal pattern upon which to focus the growth in the metropolitan area. The majority of colleges, universities, hospitals, C.B.D.'s, retail centers, office space, hotels, cultural and arts centers, sports and entertainment facilities, city halls, and airports are located within or along the centers and corridors. Maximizing future development along and within these major centers and corridors will provide the long term basis for an efficient and effective metro and regional pattern.

## The Cost of Growth

By concentrating future development within the existing centers and corridors we can ensure a long term value of public and private development, while minimizing the capital and operating costs of transportation and infrastructure. A well planned pattern of development can reduce the long term costs of transportation and infrastructure that overwhelm by making more efficient use of existing facilities and reducing the demand for increasingly new facilities and locations. Existing and future tax base and land values will be stabilized by establishing a more secure and viable relationship to the long range regional development pattern.