



Affordable Housing Advisory Commission Meeting
REMOTE*
August 19, 2020
7:00 PM
Remote Meeting



Agenda

- I. Welcome (7:00-7:05)**
- II. Consider Approval of June 2020 Meeting Minutes (7:05-7:10)**
- III. Proposed Land Use Ordinance Amendments Relating to the Historic Rogers Road Neighborhood (7:10-7:35)**
 - a. Recommendation for proposed LUO amendment
- IV. Affordable Housing Goals and Strategies Review (7:35-8:00)**
 - a. Carrboro Neighborhood Liaisons
 - b. Possible recommendation to add an overarching priority goal
- V. Proposed Changes to the AHSRF Application Process/funding guidelines (8:00-8:15)**
 - a. Survey results from AHAC and stakeholders
 - b. Possible recommendation for proposed changes to application process & guidelines
- VI. Additional comments/questions (8:15-8:30)**
 - a) **Fair Housing Sessions Recap**
 - b) **Emergency Housing Assistance update**
 - c) **September Affordable Housing Presentation to Town Council**
 - d) **Next meeting 9/16/20**

*To view the advisory board meeting, please email Rebecca Buzzard at rbuzzard@townofcarrboro.org to receive an invitation. Requests to remotely attend the meeting shall be made within 24 hours of the meeting start time.

JOINT ADVISORY BOARDS

ITEM NO. _____

AGENDA ITEM ABSTRACT

MEETING DATE: March 5, 2020

TITLE: Consideration of Land Use Ordinance Amendments Relating to the Historic Rogers Road Neighborhood

DEPARTMENT: Planning	PUBLIC HEARING: YES ___ NO_X
ATTACHMENTS: A Recommendation Template B Draft LUO Ordinance	FOR INFORMATION CONTACT: Christina Moon – 918-7325 Patricia McGuire -- 918-7327 Marty Roupe – 919-918-7333

PURPOSE

The purpose of this agenda item is for advisory boards to consider a draft amendment to the Land Use Ordinance that would establish a mixed-use zoning district for the Historic Rogers Road Neighborhood. The Town Council has set a public hearing for March 24, 2020, and has requested advisory board review prior to the hearing.

INFORMATION

A draft ordinance has been prepared to establish a new mixed-use zoning classification for the Historic Rogers Road neighborhood, which if adopted, would provide a greater range of uses, including opportunities for flex-space and live-work space as well as major home occupations. As currently written, the district would be available as a general district or as a conditional district. Adoption of the text amendment, under consideration for March 24th, would only add the districts to the Land Use Ordinance (LUO); a subsequent rezoning would be required to apply the district to property in the Historic Rogers Road community.

Background

At the April 2019, joint advisory board review meeting, advisory boards received a presentation from Renaissance Planning on the development of planning concepts designed to help implement the Historic Rogers Road neighborhood's "Mapping Our Community Future" report. (Link to the report: <http://www.townofcarrboro.org/DocumentCenter/View/5936/Mapping-Our-Communitys-Future-Report>.) Renaissance Planning was one of two consultant firms hired by Chapel Hill and Carrboro to develop land use/zoning concepts based on the 2016 report and to facilitate meetings and drop-in sessions to seek additional input from community residents. The collaborative effort yielded text amendments for both towns to establish new zoning districts, a residential district with slightly higher density (up to three lots per acre) and a mixed-use district.

At the June 18th, public hearing the Board of Aldermen adopted only the part of the draft ordinance that created the residential district (HR-R). As part of a separate agenda item, at the same meeting, the Board adopted a map amendment to rezone all thirty neighborhood properties

HR-R. (June 18th meeting materials may be found at the following link: [https://carrboro.legistar.com/LegislationDetail.aspx?ID=3985247&GUID=0D716EA5-CFF5-455C-9A6F-72DA40A48F42&Options=&Search=.](https://carrboro.legistar.com/LegislationDetail.aspx?ID=3985247&GUID=0D716EA5-CFF5-455C-9A6F-72DA40A48F42&Options=&Search=)) During the deliberation, the Board asked a number of questions and directed staff to prepare for a future meeting, a draft ordinance that would create a HR-MU district with some modifications. On February 11, 2020, staff provided the, now, Town Council with a follow up report, including a revised draft ordinance. The Council set a public hearing for March 24th and referred the matter to advisory boards for recommendations. (Meeting materials may be found at the following link: ([https://carrboro.legistar.com/LegislationDetail.aspx?ID=4327995&GUID=67D76C59-3931-44DF-A0A3-F9E31B2B7C4A&Options=&Search=.](https://carrboro.legistar.com/LegislationDetail.aspx?ID=4327995&GUID=67D76C59-3931-44DF-A0A3-F9E31B2B7C4A&Options=&Search=)))

The key changes are as follows:

- The ordinance, if adopted, would establish a Historic Rogers Road Mixed Use District as a general district and as a conditional district.
- A HR-MU district must include a minimum of 16 acres. Once rezoned, the district can be recombined or subdivided into smaller lots as part of an approved development.
- Most land uses would require a conditional use permit (CUP).
- The undisturbed buffer along the perimeter of a HR-MU district and boundary line building setbacks have been increased to 50 feet.
- Nonresidential buildings can be no larger than 6000 gross square feet. (This maximum may be subject to further discussion.)

The Council has requested that the Planning Board, Appearance Commission, Transportation Advisory Board, Economic Sustainability Commission and Northern Study Area Advisory Commission review of the draft ordinance based on their areas of expertise and provide comments.

RECOMMENDATION

Staff recommends that advisory boards review the draft ordinance (*Attachment B*) and adopt a recommendation for inclusion in the public hearing materials for March 24, 2020. A recommendation template has been provided for the boards to use (*Attachment A*).

TOWN OF CARRBORO



301 West Main Street, Carrboro, North Carolina 27510

R E C O M M E N D A T I O N

THURSDAY, MARCH 5, 2020

Land Use Ordinance Text Amendment Relating to the Historic Rogers Road Community

Motion was made by _____ and seconded by _____ that the _____ of the Town of Carrboro recommends that the Board of Aldermen _____ the draft ordinance.

VOTE:

- AYES: ()
- ABSENT/EXCUSED: ()
- NOES: ()
- ABSTENTIONS: ()

Associated Findings

By a unanimous show of hands, the _____ membership indicated that no members have any financial interests that would pose a conflict of interest to the adoption of this amendment.

Motion was made by _____ and seconded by _____ that the _____ of the Town of Carrboro finds the proposed text amendment, _____ consistent with the provisions in *Carrboro Vision2020* to promote diverse housing options with regard to type and size, the *Facilitated Small Area Plan for Carrboro’s Northern Study Area* to allow for opportunities for commercial uses at a community-scale, and the four principals of the “Rogers Road: Mapping our Community’s Future” report.

Furthermore, the _____ of the Town of Carrboro finds the proposed text amendment, prepared in response to a community initiative with considerable public input from the residents it is intended to serve is in the public interest.

VOTE:

- AYES: ()
- ABSENT/EXCUSED: ()
- NOES: ()
- ABSTENTIONS: ()

(Chair)

(Date)

AN ORDINANCE AMENDING THE CARRBORO LAND USE ORDINANCE TO ESTABLISH HISTORIC ROGERS ROAD MIXED USE DISTRICT AND ASSOCIATED DEVELOPMENT STANDARDS

DRAFT 02-21-2020

THE CARRBORO TOWN COUNCIL ORDAINS:

Section 1. The Carrboro Land Use Ordinance is amended by modifying Section, 15-136.1 Historic Rogers Road District Established, to read as follows:

Section 15-136.1 Historic Rogers Road Districts Established

- (a) The Historic Rogers Road districts, HR-R (residential) and HR-MU (mixed use), are established to implement the goals and recommendations of the *Mapping Our Community's Future* community planning effort, completed in May 2016. The intent of *Mapping Our Community's Future* and the HR Districts is to:
- 1) Create opportunities for long-term residents to continue living in the community and to age in place;
 - 2) Preserve the socioeconomic and cultural diversity of the neighborhood;
 - 3) Increase physical connections within the neighborhood, including for pedestrians and bicyclists;
 - 4) Respect and protect the natural character of the neighborhood;
 - 5) Ensure that new development is consistent with neighborhood character and the vision that residents have developed for its future;
 - 6) Provide greater residential housing choice, affordability, and diversity;
 - 7) Increase economic opportunities within the neighborhood;
 - 8) Increase recreational resources within the neighborhood; and
 - 9) Ensure that new development is adequately served by infrastructure, including streets, sidewalks, and utilities.
- (b) The HR-R zoning district is designed to protect and preserve the character of existing lower-density areas (minimum lot size 14,520 square feet, or no more than three lots per acre) within the neighborhood while providing for compatible new development, including new housing choice options, and increased home occupation opportunities for residents.
- (c) The HR-MU district is designed to provide for a broader range of housing and employment options by concentrating new development into nodes which will balance providing areas for desired new uses while protecting the overall neighborhood character. Uses appropriate in the HR-MU district include live-work units, flex space, and low-intensity neighborhood-serving establishments such as healthcare, assisted living, elder care, child care, and recreation facilities. Property proposed for rezoning to HR-MU district shall include no

less than sixteen contiguous acres. The development of an HR-MU district may include the recombination of existing lots and/or the subdivision of new lots that meet the density and dimensional standards outlined in Article XII.

Section 2. Section 15-141.4(a) of the Carrboro Land Use Ordinance is amended to read as follows:

- (a) Conditional zoning districts are zoning districts in which the development and use of the property so zoned are governed by the regulations applicable to one of the general use zoning districts listed in the Table of Permissible Uses, as modified by the conditions and restrictions imposed as part of the legislative decision creating the district and applying it to the particular property. Accordingly, the following conditional zoning districts may be established:

R-20-CZ, R-15-CZ, R-10-CZ, R-7.5-CZ, R-3-CZ, R-2-CZ, R-R-CZ, R-S.I.R.-CZ, and R-S.I.R.-2-CZ

B-1(C)-CZ, B-1(G)-CZ, B-2-CZ, B-3-CZ, B-3-T-CZ, B-4-CZ, CT-CZ, O-CZ, OACZ, M-1-CZ, M-2-CZ (AMENDED 4/27/10; 06/23/15; 10/23/18)

There may also be established a HR-MU-CZ zoning district, pursuant to the purpose statement and criteria described in Section 15-136.1.

Section 3. Article II Section 15-15 Definitions of Basic Terms is amended by modifying the existing definition of Home Occupation, Major to add a reference the HR-MU district as follows:

Home Occupation, Major. A Major Home Occupation is an accessory business use of a residentially-zoned property, that meets one or more of the following criteria: (i) employs up to four non-resident employees, who may work on site; (ii) utilizes outdoor storage of materials, supplies, products, or machinery; or (iii) generates noise, vibration, dust, odor, light, or glare that is visible from neighboring properties or the public right-of-way at any hour of the day. Examples of Major Home Occupations include: lawncare or landscaping services, woodworking shops, small engine repair, appliance repair, metalworking, and any home business with more than one non-resident employee. Major home occupation uses are only permissible with a zoning permit in the HR-R and HR-MU districts, and are subject to the performance standards specified in Section 15-176.9.

Section 4. Section 15-146 (Table of Permissible Uses) is amended by adding one new column labelled HR-MU with permissible use classifications as shown in the attached Exhibit 'A.' The letters "Z," "S," "C," "SC," and "ZS," and the symbol "*" have the meanings described for all uses as provided in applicable subsections of Section 15-147.

Section 5. Section 15-176.9 Special Standards for Historic Rogers Road District, is amended to include the HR-MU District as follows:

Section 15-176.9 Special Standards for Historic Rogers Road Districts.

- (a) All applicable provisions of the Carrboro Land Use Ordinance not specifically exempted or modified by this section shall apply to the HR-R and HR-MU districts.
- (b) In both the HR-R and HR-MU districts, the maximum size of any single-family dwelling constructed after the effective date of this section shall be 2,000 square feet of heated floor area; the maximum size of any duplex or triplex dwelling unit constructed after the effective date of this section shall be 1,200 square feet of heated floor area. Any dwelling unit in existence on the effective date of this subsection containing 2,000 square feet or greater of heated floor area may be increased by a maximum of 25% of the existing heated floor area or 500 square feet whichever is greater, but with a maximum size of 2,500 square feet at any time. Any dwelling unit in existence on the effective date of this subsection containing less than 2,000 square feet of heated floor area may be expanded up to a maximum size of 2,000 square feet of heated floor area or 25% whichever is greater.
- (c) In the HR-MU district the maximum size of the building footprint for any building containing any nonresidential uses shall not exceed 6,000 square feet.
- (d) An undisturbed buffer, of no less than 50 feet, shall be maintained along the perimeter of the entire HR-MU district.
 - 1. The buffer shall consist of existing vegetation and/or new plantings to meet the requirements in Section 15-307(1) for an Opaque Type A screen.
 - 2. This area shall remain undisturbed except for the removal of noxious weeds and trees determined to be diseased by a Certified Arborist, and the installation of new plantings as required by the standards for a Type A screen described in subsection (c)(1) above.
- (e) Development within the HR-MU district shall be subject to the screening requirements of Section 15-306, to provide sufficient screening between uses, so long as a Type A screen is retained at the boundary line of any parcel in the HR-MU district where that parcel adjoins an adjacent property outside of the district.
- (f) As set forth in the Table of Permissible Uses, Major Home Occupations are permissible only in the HR-R and HR-MU districts, subject to the following standards:
 - 1. Must be conducted by a person who resides on the same lot.
 - 2. Major Home Occupations shall only be located on lots a minimum of one acre in size.
 - 3. No more than 50% of the heated square footage of the home shall be used for business purposes. This calculation does not include accessory structures in the total square footage calculation for the home; such structures shall be limited to a maximum size of 150% of the home, but in no case shall exceed 2,000 gross square feet.
 - 4. The maximum number of trips per day to or from the business shall not exceed 50.
 - 5. The on-premises sale and delivery of goods which are not produced on the premises is prohibited, except in the case of the delivery and sale of goods incidental to the provision of a service.
 - 6. No more than three business-associated vehicles shall be parked on-site.
 - 7. Business-associated vehicles shall be limited to vehicles allowed under a Class C license.
 - 8. Parking for vehicles associated with the business, including employee and visitor vehicles shall be provided on-site, pursuant to the requirements in Section 15-291.

- 9. If more than three parking spaces are provided for business-associated vehicles and / or employees and visitors, then the additional spaces above three must be screened by a Type A buffer.
- 10. All business activities shall be a minimum of 60 feet from all lot lines or within a fully enclosed building.
- 11. All noise, dust, vibration, odor, light, and glare-producing activities shall be located a minimum of 60 feet from all lot lines, and any activity that results in noise, vibration, dust, odor, light, or glare shall only occur between the hours of 8 AM and 6 PM.
- 12. Any outdoor storage of materials, supplies, products, or machinery (excluding functional vehicles associated with the business) shall be screened with a Type A screen as described in LUO Section 15-307.

- (g) Any Land Use Category 8.100 use located in the HR-MU district is limited to 2,000 square feet heated floor area and may only conduct business between the hours of 6 am and 9 pm.
- (h) For proposed developments within the HR-MU District, a phasing plan must be incorporated into the project which mandates that at least fifteen percent (15%) of the uses must be nonresidential and at least fifteen percent (15%) of the uses must be residential. The phasing plan must ensure that the nonresidential portions are completed prior to or in conjunction with the residential portions of each phase.

Section 6. Section 15-181 Minimum Lot Size Requirements, subsection (a) is revised with the addition of minimum lot size requirements for the HR-MU zoning district as follows:

<u>ZONE</u>	<u>MINIMUM SQUARE FEET</u>
HR-MU	7,500

Section 7. Section 15-182 Residential Density, subsection (a) is revised with the addition of residential density requirements for the HR-MU zoning district, as follows:

<u>ZONE</u>	<u>Minimum Square Feet Per Dwelling Unit, Multi-Family, Triplex and Duplex</u>
HR-MU	7,500

Section 8. Section 15-182.3 Residential Density of Major Developments in Certain Districts, subsection (a) is amended to read as follows:

- (a) Notwithstanding the provisions of Section 15-182, when any tract of land within the R-10, R-15, R-20, RR, HR-R and HR-MU districts is developed under circumstances requiring the issuance of a special or any tract within the R-10, R-15, R-20, RR, HR-R or HR-MU requiring the issuance of conditional use permit, the maximum number of dwelling units that may be placed on that tract shall be determined in accordance with the provisions of this section.

Section 9. Section 15-183 Minimum Lot Widths, subsection (b) is revised with the addition of minimum lot width requirements for the HR-MU zoning district, as follows:

<u>ZONE</u>	<u>Lot Width</u>
HR-MU	50

Section 10. Subsection 15-184 Building Setback Requirements, subsection (a) is revised with the addition of setback requirements for the HR-MU zoning district, as follows:

<u>ZONE</u>	<u>Minimum Distance from Street Right of Way Line</u>		<u>Minimum Distance from Street Centerline</u>		<u>Minimum Distance from Lot Boundary Line</u>
	Building	Freestanding Sign	Building	Freestanding Sign	Building and Freestanding Sign
HR-MU	50	20	70	50	50

Section 11. The table included in Subsection 15-185 (a) (2) is amended by the addition of information on the maximum building height for the HR-MU zoning district, as follows:

<u>ZONE</u>	<u>Maximum Height</u>
HR-MU	40'

Section 12. Article XVII Signs, Section 15-271(e) is amended to read as follows:

- (e) Signs for home occupations and major home occupations shall be permitted subject to the following provisions:
 1. A lot that houses a legally-established home-based occupation as an accessory use may have up to one wall-mounted sign with a maximum area of 4 square feet. In the HR-R and HR-MU districts, legally-established major home occupations may have up to one wall-mounted sign with a maximum area of 8 square feet.
 2. Signs must be non-illuminated.
 3. Signs shall comply with the standards of Sections 15-271, Permit Required for Signs, 15-275, Computation of Sign Area, and 15-282, Miscellaneous Requirements.

Section 13. All provisions of any town ordinance in conflict with this ordinance are repealed.

Section 14. This ordinance shall become effective upon adoption

Exhibit 'A' - TABLE OF PERMISSIBLE USES
Historic Rogers Road Zoning District Additions - 2/21/2020

DESCRIPTION	HR MU
1.000 Residential	
1.100 Single Family Residences	
1.110 Single Family Detached One Dwelling Unit Per Lot	
1.111 Site Built/Modular	Z
1.112 Class A Mobile Home	Z
1.113 Class B Mobile Home	
1.120 Single Family Detached More Than One Dwelling Unit Per Lot	
1.121 Site Built/Modular	*
1.122 Class A Mobile Home	*
1.123 Class B Mobile Home	
1.200 Two-Family Residences	
1.210 Two-Family Conversion	*
1.220 Primary Residence with Accessory Apartment	* *
1.230 Duplex	
1.231 Maximum 20% units > 3 bedrms/du	*
1.232 No bedroom limit	
1.240 Two Family Apartment	
1.241 Maximum 20% units > 3 bedrms/du	*
1.242 No bedroom limit	
1.300 Multi-Family Residences	
1.310 Multi-Family Conversion	
1.320 Multi-Family Townhomes	
1.321 Maximum 20% units > 3 bedrms/du	C
1.322 No bedroom limit	
1.330 Multi-Family Apartments	
1.331 Maximum 20% units > 3 bedrms/du	
1.332 No bedroom limit	
1.340 Single-Room Occupancy	
1.350 Triplex	C
1.400 Group Homes	
1.410 Fraternities, Sororities, Dormitories and Similar Housing	
1.420 Boarding Houses, Rooming Houses	
1.430 Adult Care Home, Class A	C
1.440 Adult Care Home, Class B	C
1.450 Child Care Home, Class A	C
1.460 Child Care Home, Class B	C
1.470 Maternity Home	C

Exhibit 'A' - TABLE OF PERMISSIBLE USES
Historic Rogers Road Zoning District Additions - 2/21/2020

DESCRIPTION	HR MU
1.480 Nursing Care Home	C
1.500 Temporary Residences	
1.510 Tourist Homes and other Temporary Residences Renting Rooms for Relatively Short Periods of Time	
1.600 Homes Emphasizing Services, Treatment or Supervision	
1.610 Temporary Homes for the Homeless	
1.620 Overnight Shelters for Homeless	
1.630 Senior Citizen Residential Complex	
1.700	
1.800	
1.900 Home Occupation	Z
1.910 Major Home Occupation	Z
2.000 Sales and Rental of Goods, Merchandise and Equipment	
2.100 No Storage or Display of Goods Outside Fully Enclosed Building	
2.110 High-Volume Traffic Generation	
2.111 ABC Stores	
2.112 Specialty High Volume Retail	
2.120 Low-Volume Traffic Generation	
2.130 Wholesale Sales	
2.140 Drive-In Windows	
2.150 Retail Sales with Subordinate Manufacturing and Processing	
2.200 Display of Goods Outside Fully Enclosed Building	
2.210 High-Volume Traffic Generation	
2.220 Low-Volume Traffic Generation	
2.230 Wholesale Sales	
2.240 Drive-In Windows	
2.300 Storage of goods outside fully enclosed building	
2.310 High-volume traffic generation	
2.320 Low-volume traffic	
2.330 Wholesale Sales	

Exhibit 'A' - TABLE OF PERMISSIBLE USES
Historic Rogers Road Zoning District Additions - 2/21/2020

DESCRIPTION	HR MU
2.340 Drive-in Windows	
3.000 Office, Clerical, Research and Services Not Primarily Related to Goods or Merchandise	
3.100 All operations conducted entirely Within Fully Enclosed Building	
3.110 Operations designed to attract and serve customers or clients on the premises, such as the office of attorneys, physicians, other professions, insurance and stock brokers, travel agents, government office buildings, etc.	C
3.120 Operations designed to attract little or no customer or client traffic other than employees of the entity operating the principal use	C
3.130 Office or clinics of physicians or dentists with not more than 10,000 square feet of gross floor area	C
3.140 Watershed research	
3.150 Copy Centers/Printing Operatio	C
3.200 Operations conducted within or outside fully enclosed buildings	
3.210 Operations designed to affect and serve customers or clients on the premises	
3.220 Operations designed to attract little or no customer or client traffic other than employees of the entity operating the principal use	
3.230 Banks with drive-in window	
3.240 Watershed research	
3.250 Automatic Teller Machine, Freestanding	
3.260 Social Service Provider with Dining	
4.000 Manufacturing, Processing, Creating, Repairing, Renovating, Painting, Cleaning, Assembling of Goods,	

Exhibit 'A' - TABLE OF PERMISSIBLE USES
Historic Rogers Road Zoning District Additions - 2/21/2020

DESCRIPTION		HR MU
Merchandise and Equipment		
4.100	All operations conducted entirely within fully enclosed buildings	C
4.200	Operations conducted within or outside fully enclosed buildings	
5.000 Educational, Cultural, Religious, Philanthropic, Social, Fraternal Uses		
5.100	Schools	
5.110	Elementary and secondary (including associated grounds and athletic and other facilities)	C
5.120	Trade or vocational school	
5.130	College	
5.200	Churches, synagogues and temples (including associated residential structures for religious personnel and associated buildings but not including elementary school buildings) school or secondary	C
5.300	Libraries, museums, art galleries, art centers and similar uses (including associated educational and instructional activities)	
5.310	Located within a building designed and previously occupied as a residence or within a building having a gross floor area not in excess of 3,500 square feet	
5.320	Located within any permissible structures	
5.400	Social, fraternal clubs and lodges, union halls, and similar uses	
6.000 Recreation, Amusement, Entertainment		
6.100	Activity conducted entirely within building or substantial structure	
6.110	Bowling alley, skating rinks, indoor tennis and squash courts, billiards and pool halls, indoor athletic and exercise facilities and similar uses.	
6.120	Movie Theaters	
6.121	Seating capacity of	

Exhibit 'A' - TABLE OF PERMISSIBLE USES
Historic Rogers Road Zoning District Additions - 2/21/2020

DESCRIPTION	HR MU
not more than 300	
6.122 Unlimited Seating Capacity	
6.130 Coliseums, stadiums, and all other facilities listed in the 6.100 classification designed to seat or accommodate simultaneously more than 1000 people	
6.140 Community Center--a Town sponsored, non-profit indoor facility providing for one or several of various type of recreational uses. Facilities in a Community Center may include, but are not limited to gymnasias, swimming pools, indoor court areas, meeting/activity rooms, and other similar uses	
6.150 Electronic Gaming Operations	
6.200 Activity conducted primarily outside enclosed buildings or structures.	
6.210 Outdoor recreational facilities developed on private lands, without Town sponsorship or investment, such as golf and country clubs, swimming or tennis clubs, etc. and not constructed pursuant to a permit authorizing the construction of a residential development.	
6.220 Outdoor recreational facilities developed on public lands, or on private lands with swimming pools, parks, etc., not constructed pursuant to a permit authorizing the construction of another use such as a school	
6.221 Town of Carrboro owned and operated facilities.	
6.222 Facilities owned and operated by public entities other than the Town of Carrboro	
6.230 Golf driving ranges not accessory to golf course, par 3 golf courses, miniature golf course, skateboard parks,	

Exhibit 'A' - TABLE OF PERMISSIBLE USES
Historic Rogers Road Zoning District Additions - 2/21/2020

DESCRIPTION	HR MU
water slides, and similar uses.	
6.240 Horseback riding stables (not constructed pursuant to permit authorizing residential development)	
6.250 Automobile and motorcycle racing tracks	
6.260 Drive-in Movie Theaters	
7.000 Institutional Residence or Care of Confinement Facilities	
7.100 Hospitals, clinics, other medical (including mental health) treatment facilities in excess of 10,000 square feet of floor area	
7.200 Nursing care institutions, intermediate care institutions, handicapped, aged or infirm institutions, child care institutions	
7.300 Institutions (other than halfway houses) where mentally ill persons are confined	
7.400 Penal and Correctional Facilities	
8.000 Restaurants (including food delivery services), Bars, Night Clubs	
8.100 Restaurant with none of the features listed in use classification below as its primary activity	C
8.200 Outside Service or Consumption	
8.300 Drive-in (service to and consumption in vehicle on premises)	
8.400 Drive Through Windows (service directly to vehicles primarily for off-premises consumption)	
8.500 Carry Out Service (food picked up inside of off-premises consumption)	
8.600 Food Delivery	
8.700 Mobile prepared food vendors	
9.000 Motor Vehicle-Related Sales and Service Operations	
9.100 Motor vehicle sales or rental of sales and service	
9.200 Automobile service stations	
9.300 Gas sales operations	
9.400 Automobile repair shop or body shop	
9.500 Car wash	
10.000 Storage and Parking	
10.100 Independent automobile parking lots or garages	

Exhibit 'A' - TABLE OF PERMISSIBLE USES
Historic Rogers Road Zoning District Additions - 2/21/2020

DESCRIPTION	HR MU
10.200 Storage of goods not related to sale or uses of those goods on the same lot where they are stored	
10.210 All storage within completely enclosed structures	
10.220 Storage inside or outside completely enclosed structures	
10.300 Parking of vehicles or storage of equipment outside enclosed structures where: (i) vehicles or equipment are owned and used by the person making use of the lot, and (ii) parking or storage is more than a minor and incidental part of the overall use made of the lot	
11.000 Scrap Materials Salvage Yards, Junkyards, Automobile Graveyards	
12.000 Services and Enterprises Related to Animals	
12.100 Veterinarian	
12.200 Kennel	
13.000 Emergency Services	
13.100 Police Stations	
13.200 Fire Stations	
13.300 Rescue Squad, Ambulance Service	
13.400 Civil Defense Operation	
14.000 Agricultural, Silvicultural, Mining, Quarrying Operations	
14.100 Agricultural operations, farming	
14.110 Excluding livestock	
14.120 Including livestock	
14.200 Silvicultural operations	
14.300 Mining or quarrying operations, including on-site sales of products	
14.400 Reclamation landfill	
15.000 Miscellaneous Public and Semi-Public Facilities	
15.100 Post Office	
15.200 Airport	
15.300 Sanitary landfill	
15.400 Military reserve, National Guard centers	
15.500 Recycling materials collection operations	
15.510 Using collection facilities other than motor vehicles	
15.520 Aluminum recycling using motor vehicles	

Exhibit 'A' - TABLE OF PERMISSIBLE USES
Historic Rogers Road Zoning District Additions - 2/21/2020

DESCRIPTION	HR MU
15.600 Public utility service complex	
15.700 Cable Television Signal Distribution Center	
15.750 Data Service Provider Facility	
15.800 Town-owned and/or Operated Facilities and Services	
15.810 Town-owned and/or Operated Public Parking Lot	
15.820 All other town-owned and/or operated facilities and services	
16.000 Dry Cleaner, Laundromat	
16.100 With drive-in windows	
16.200 Without drive-in windows	
17.000 Utility Facilities	
17.100 Neighborhood	
17.200 Community or regional	
17.300 Cable Television Satellite Station	
17.400 Underground Utility Lines	
17.410 Electric Power Lines & Gas Lines	
17.420 Other Underground Lines	
17.500 Solar Array	
17.501 Solar Array Facility, Level 1	
17.502 Solar Array Facility, Level 2	
17.503 Solar Array Facility, Level 3	
18.000 Towers and Related Structures	
18.100 Towers and antennas fifty feet tall or less	C
18.200 Towers and antennas attached thereto that exceed 50 feet in height, and that are not regarded as accessory to residential users under 15-150(c)(5)	
18.300 Antennas exceeding 50 feet in height attached to structures other than towers, [other than accessory uses under 15-150(c)(5)]	
18.400 Publicly-owned towers and antennas of all sizes that are used in the provision of public safety services	
19.000 Open Air Markets and Horticultural Sales	
19.100 Open air markets (farm and craft markets, flea markets, produce markets)	
19.200 Horticultural sales with outdoor display	
19.300 Seasonal Christmas or pumpkin sales	
20.000 Funeral Homes	

Exhibit 'A' - TABLE OF PERMISSIBLE USES
Historic Rogers Road Zoning District Additions - 2/21/2020

DESCRIPTION	HR MU
21.000 Cemetery and Crematorium	
21.100 Town-owned cemetery	
21.200 All other cemeteries	
21.300 Crematorium	
22.000 Day Care	
22.100 Child Day Care Home	C
22.200 Child Day Care Facility	C
22.300 Senior Citizens Day Care, Class A	C
22.400 Senior Citizens Day Care, Class B	C
23.000 Temporary structure or parking lots used in connection with the construction of a permanent building or for some non-recurring purpose	
23.100 Temporary structures located on same lot as activity generating need for structure	C
23.200 Temporary parking facilities located on or off-site of activity generating need for parking	
24.000 Bus Station	
25.000 Commercial Greenhouse Operations	
25.100 No on-premises sales	
25.200 On-premises sales permitted	
26.000 Subdivisions	
26.100 Major	C
26.200 Minor	C
27.000 Combination Uses	C
28.000 Planned Unit Developments	
29.000 Special Events	C
30.000 Planned Industrial Development	
31.000 Off-Premises Signs	
32.000 Village Mixed Use Development	
33.000 Office/Assembly Planned Development	
34.000 Temporary Lodging	
34.100 Hotels and Motels	
34.200 Bed and Breakfast	C

TOWN OF CARRBORO



301 West Main Street, Carrboro, North Carolina 27510

R E C O M M E N D A T I O N

WEDNESDAY, AUGUST 19, 2020

Land Use Ordinance Text Amendment Relating to the Historic Rogers Road Community

Motion was made by _____ and seconded by _____ that the Affordable Housing Advisory Commission (AHAC) of the Town of Carrboro recommends that the Town Council _____ the draft ordinance.

VOTE:

AYES: ()

ABSENT/EXCUSED: ()

NOES: ()

ABSTENTIONS: ()

Associated Findings

By a unanimous show of hands, the AHAC membership indicated that no members have any financial interests that would pose a conflict of interest to the adoption of this amendment.

Motion was made by _____ and seconded by _____ that the AHAC of the Town of Carrboro finds the proposed text amendment, _____ consistent with the provisions in *Carrboro Vision2020* to promote diverse housing options with regard to type and size, the *Facilitated Small Area Plan for Carrboro's Northern Study Area* to allow for opportunities for commercial uses at a community-scale, and the four principals of the "Rogers Road: Mapping our Community's Future" report.

Furthermore, the AHAC of the Town of Carrboro finds the proposed text amendment, prepared in response to a community initiative with considerable public input from the residents it is intended to serve is in the public interest.

VOTE:

AYES: ()

ABSENT/EXCUSED: ()

NOES: ()

ABSTENTIONS: ()

(Chair)

(Date)

Town of Carrboro Affordable Housing Goals and Strategies

The Town of Carrboro is devoted to providing opportunities for safe, decent and affordable housing for all residents no matter their age, ability or income level.

Goal	Strategies	Target Completion Date	Partners/Resources Needed	Updates and Plans
1. Affordable Homeownership (Target income range is 60%-115% AMI)				
1.1 Increase number of homeownership units that are permanently affordable in Carrboro. 2024 goal is to have 85 affordable ownership homes. In July 2020, there were 71 affordable homeownership units. (Note: the Cobb Street project will add 4 units next FY)	A. Gather more data from the developers about what percentages will work to both incentivize them and respond to the market condition.	FY2024	Developers, Orange County Affordable Housing Coalition, non-profit housing developers, staff	1. Work with affordable housing nonprofits to permanently preserve existing affordable units and to create new affordable units. 3. Exploring the use of abandoned properties, Town-owned properties, mobile home parks , and tiny homes.
	B. Request that the BOCC continue to fund impact, permitting fees for non-profits.	Ongoing	Orange County	County is working closely with jurisdictions on affordable housing projects.
	C. Analyze modifying the ordinance to reflect a model that will both incentivize developers and respond to market conditions. Ex. Expedited development review process.	FY2020-21	Orange County Affordable Housing Coalition, non-profit housing providers, staff	Based on findings of 1.1A in conjunction with the Comprehensive Plan .
	D. Identify/build dedicated subsidy source to assist with land trust transactions.	Completed		The Affordable Housing Special Revenue Fund is a dedicated funding source to support affordable housing initiatives, including subsidizing land trust transactions. The Town Council has dedicated 1.5 cents of property tax revenue to affordable housing - ~\$337,500 per year.
1.2 Fully evaluate and reduce housing density restrictions to slow the climb of housing prices and diversify housing stock, particularly in high transit areas.	A. Schedule a community discussion to examine open space requirements and their implications on housing prices and the feasibility for inclusion of affordable units.	Ongoing	For and non-profit housing providers, citizens, environmental advocates, recreation advocates, Town and County elected officials	1. Based on findings of 1.1A, reevaluate and incorporate findings into Comprehensive Plan . 2. Greene Tract
	B. As a component of the parking plan, determine whether modifications to parking requirements could materially affect homeownership prices, development opportunities, and density. Unbundled parking for condominiums and townhouses should be included in this analysis.	FY2020-21	Staff, Comp. Plan committees	Reevaluate for Comprehensive Plan
	C. Explore opportunities to modify zoning and land-use ordinances related to in-fill residential, connected housing, zero lot-line housing, and mixed-use developments.	Ongoing	Staff, intern, graduate planning workshop students, development community	1. With 1.2A above, reevaluate and incorporate completed study findings into Comprehensive Plan . 2. In FY2020-21, Consideration of Land Use Ordinance Amendments Relating to the Historic Rogers Road Neighborhood
1.3 Decrease barriers to first-time homeownership and to homeownership retention, particularly among seniors	A. Develop and implement a clear set of priorities and policies for the use of dedicated funding that includes opportunities to support this goal.	Ongoing	Affordable Housing Advisory Commission, Town Council, Orange County Affordable Housing Coalition, Consolidated Plan partners	1. Update the Affordable Housing Fund Guidelines to reflect Goals and Strategies Document 2. Subcommittees of Orange County Affordable Housing Coalition formed specifically to address housing for 30% AMI and under group and mobile home displacement . 3. Engagement in Orange County Master Aging Plan Committee informs affordable housing priorities 4. In June 2020, approved text amendment to LUO to facilitate 104 Cobb Street Habitat for Humanity projects - 4 units
	A1. Down payment assistance for families participating in local homebuyer education programs.	Ongoing	Federal and state funding for down payment assistance	1. Council approved the Buyer Identified Homeownership Program 2. Staff worked with CHT to implement - 1st implementation phase is targeting Town employees. Two families helped.

	A2. Grants for critical home repairs, energy efficiency, up fits to accommodate changing mobility, etc. +opportunities to decrease utility payments.	Ongoing	Affordable Housing Advisory Commission, Town Council and staff	1. Annually award grants from the Affordable Housing Special Revenue Fund to nonprofits conducting critical repairs, improvements in energy efficiency and/or universal design upgrades on behalf of qualifying individuals. In FY2019-20, 15 homes and 8 EmPOWERment-owned rental units were repaired, weatherized or rehabbed through this fund. 2. Participation in OWASA's Affordability Outreach Program to decrease water bill payments for residents. 3. Engagement in Orange County Preservation Coalition
1.4 Continuously improve public transit access, with a particular eye to moderate-income homeownership communities and developments with an affordability component.	A. Determine whether subsidizing transit access should be an approved use for dedicated housing funds.	Ongoing	Orange County Affordable Housing Coalition, Town Council, Consolidated Plan partners	With 1.3 above. Not currently an approved use of funds in the Affordable Housing Special Revenue Fund but access to public transit is measured when reviewing applications to the Affordable Housing Special Revenue Fund.
	B. Partner with CHT, and homeowners associations to identify and pursue opportunities to fund or otherwise make practical greater transit service to growing areas, including feeder systems to main routes.	Ongoing	Chapel Hill Transit, Transit Partners Committee, developers, HOAs, GoTriangle	1. "Provide geographic equity" and "Support transit-oriented land use" are long term goals of the Orange County Transit Plan. 2. In FY21, Chapel Hill Transit's Short Range Transit Plan (SRTP) increased weekend service routes. 3. Bus shelter added to Rogers Road community.
	C. Play a leadership role at local and regional transit 'tables' to ensure future transit priorities and policies support affordable housing goals.	Ongoing	Transit Partners, DCHC MPO	Council Member Seils, Council Member Haven-O'Donnell and Town staff serve on the Partners Transit Committee 2. Carrboro Transit Partners connected CHT to both Carolina Spring and IFC to facilitate inclusion of their client's needs in the SRTP.
2. Affordable Rentals (Target income is 60% or less of AMI)				
2.1 Increase number of rental units that are permanently affordable to individuals and families earning less than 60% of AMI. 2024 goal is to have 470 affordable rental units. By July 2020, there were 372 affordable rental units.	A. Modify ordinance to reflect a model that will both incentivize developers to include affordable units in their rental developments while also responding to market conditions.	Ongoing	Developers/Property Owners, Orange County Affordable Housing Coalition, Town Council, Staff	1. With 1.1 and 1.2 plans
	B. Work with Orange County, the University, and other landowners to examine, identify and reserve one or more tracts for future LIHTC and/or HUD-restricted rental communities.	Ongoing	Local governments, property owners, University	1. Staff created a map to identify possible LIHTC parcels and met with a developer to analyze the map 2. Have worked with OC and Chapel Hill to identify publicly owned land that could be suitable for affordable housing development 3. CASA LIHTC development off Merritt Mill Road approved in 2018, and in 2020 CASA was awarded a 9% LIHTC project. Construction will begin in 2021.
	C. Better position the town for future affordable rental development /redevelopment opportunities by cultivating relationships with experienced non-profit affordable rental housing developers.	Ongoing	OC Housing Coalition, NC Housing Coalition, DHIC, CH-Carrboro Chamber of Commerce Big Bold Ideas Group	1. Staff engaged with nonprofit affordable housing agencies in OC and state level. Continuously working to build relationships. 2. Staff participate in monthly Orange County Affordable Housing Coalition Meetings and serve on its subcommittees.
2.2 Reduce negative effects of parking requirements on rental prices.	A. Fully examine research and data regarding parking density and "bundling" to determine best approaches to achieve this goal.	Ongoing	Planning staff	Reevaluate for Comprehensive Plan
	B. Utilize Town's parking management policy to support this goal.	Ongoing	Planning staff	Reevaluate for Comprehensive Plan
2.3 Slow the pressure on rental prices by increasing rental housing stock, particularly in high-transit areas.	A. Examine and consider reducing restrictions on accessory dwelling units. This strategy has the potential to support homeownership affordability by enabling homeowners to generate income to support their homeownership costs.	Ongoing	Developers, Orange County Affordable Housing Coalition, non-profit housing developers, planning staff	With 1.1, 1.2, and 2.1 plans 1. Research and consider tiny homes and modular homes in this strategy, in progress, Orange County Affordable Housing Coalition 2. In FY21, will explore the possibility of tiny homes on Town-owned land with the Northside Initiative.
2.4 Reduce erosion of rental housing quality and affordability	A. Research effective voluntary rental registry models and determine the efficacy of a similar program in Carrboro. If feasible, determine opportunities to implement a registry or rating system through a non-profit or other civic organization, with Town support.	FY2021	Orange County Affordable Housing Coalition, staff	Can be explored through the OCAHC's ELI (extremely low-income) subcommittee.

	B. Require all landlords with more than one unit of rental property to register for a business privilege license, and examine use of business regulations to enforce better <u>stewardship of housing and neighborhoods</u> .	FY2021	Orange County Affordable Housing Coalition, staff	Can be explored.
	C. Gather and examine rental housing data to better anticipate and monitor opportunities/conditions for redevelopment/rehabilitation.	Ongoing	OC Housing Coalition, Orange County HHRCD/Chapel Hill (Consolidated Plan partners)	Publicly available housing data has been collected and analyzed to gain a better understanding of the housing and affordable housing market in Carrboro. Reviewed annually.
	D. Convene landlords and property managers on an annual (regular) basis to build positive relationships, educate about Carrboro's housing expectations and policies, and encourage transparency about redevelopment/rehab/sale plans.	FY2021	Orange County Affordable Housing Coalition, staff	Master leasing being explored and evaluated by Orange County Affordable Housing Coalition.
2.5 Examine the current marketplace for mobile and modular homes.	A. Educate the Town Council about the difference between the housing styles and regulations that apply.	FY2021	Orange County Affordable Housing Coalition, Orange County Collaborative, staff	1. Draft plan in development. 2. Orange County Affordable Housing Collaborative and Coalition considering mobile homes as affordable housing strategy. 3. OCAHC is re-creating a mobile home subcommittee for FY2020-21.
3. Overarching Priorities				
3.1 Concerted Land Use Planning/small land use plan for three high priority/high potential areas.	A. Identify the three high priority/potential areas that are ripe for development or re-development. Could include: downtown, Jones Ferry Corridor, Estes Drive.	Ongoing	Affordable Housing Advisory Commission, Town Council, and staff	1. Staff working with Northside Initiative to determine feasibility of tiny homes on a Town-owned parcel in the Northside community. 2. Map of naturally occurring affordable housing (NOAH) in Carrboro in progress. 3. Four Habitat for Humanity homes to be built on Cobb St. in 2021.
	B. Consider the current planning processes that are underway and share coordination and overlap.	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	Comprehensive Plan Development.
3.2 Improve opportunities for developers and potential partners to identify affordability in a project.	A. Include members of OCAHC in initial development review to encourage creative solutions/opportunities for affordable housing to be integrated into projects, and/or identify best opportunities to secure payment-in-lieu.	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	1. Staff provides information to OCAHC on proposed developments to allow an opportunity to receive their input
3.3 Develop dedicated funding source--in partnership with county and peer municipalities	A. Explore the parameters of an AH Bond. □	Completed	HOME Consortium, Consolidated Plan Partners, Orange County Affordable Housing Coalition, and Downtown Housing Improvement Corporation (DHIC).	1. The Town's Affordable Housing Special Revenue Fund currently provides \$337,500 annually to support affordable housing projects. 2. Federal CARES funding has been used to provide emergency housing assistance to Carrboro renters affected by COVID - \$120,000 as of July 2020.
	B. Explore a public private fund for example TCF.	Completed		
	C. Find out about tax deduction.	Completed		CASA is building a LIHTC development on Merritt Mill Road, supported by Affordable Housing Special Revenue Fund.
	D. Look to identify complimentary external funding that could be better leveraged with municipal participation.	Ongoing	Orange County Affordable Housing Coalition, staff	Additional funding opportunities, including federal and state grants, are assessed through the Orange County Affordable Housing Coalition.
	E. Assessment of the most cost effective strategies-if we had a pot of money what is the best way to use it.	Completed	University, staff	In 2015, Staff worked with a UNC Capstone Group to analyze the cost effectiveness of each strategy, including subsidy amount needed and target population for each AH development model
3.4 Ensure implementation of the Affordable Housing Strategy	A. Affordable Housing Advisory Commission meets monthly. □	Ongoing		Town Affordable Housing Advisory Commission established in 2018 and meets monthly. Includes a Council liaison and a staff liaison.
	B. Ensure operationalization and monitor progress of affordable housing plan by staffing at least 1/2 time.	Ongoing		Staffing is provided by the Director and Management Specialist (at least 1/2 time for both positions)
	C. Continue to look at data and continuing to understand it-existing stock-number of affordable units and distribution-including transit access, non-motorized travel, overlaid with the <u>distribution of housing</u> .	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	1. Staff collects data on existing permanent affordable housing and updates on an annual basis 2. Creating a GIS map which strives to reflect current affordable housing and its proximity to resources
3.5 Provide greater incentives for developers to include affordable housing in their projects	A. Expedited review for projects that include affordable housing component.	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	With 1.1, 1.2, 2.1, and 2.3 plans 1. Include Affordable Housing Advisory Commission in review process. 2. Include in Comprehensive Plan Development.

	B. Ask 3-5 developers to do an assessment of the costs for all of the LUO requirements-how much does this increase the cost per unit, or the rent per unit.	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	1. With 1.1, 1.2, 2.1, and 2.3 plans in conjunction with Comprehensive Plan 2. In FY2019-2020, the AHAC held two meetings with a private developer - for project review and a more general discussion about AH and the for-profit market.
	C. Evaluate the provision of public sector assistance for infrastructure in exchange for the provision of some percentage of affordable units (scaled).	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	With 1.1, 1.2, 2.1, and 2.3 plans in conjunction with Comprehensive Plan
3.6 Reduce utility costs	A. Work with OWASA, explore grants for energy efficiency.	Ongoing	OWASA, staff	Extension of Rogers Road sewer completed in June 2019. Providing public assistance to eligible households.
3.7 Acquisition of land/property-be proactive with OWASA in the land or parcels they are saying they will offer to municipalities first-Start to engage with them	A. OWASA-example but there are other options.	Completed	OWASA, staff	1. Staff has worked with OWASA to identify and evaluate potential sites. 2. All sites in Carrboro are mission critical and are not available to be sold or used for affordable housing. □
	B. Consider condemned properties -provide an incentive for homeowner to sell loan fund for Habitat, Empowerment to allow for the property to be renovated and fixed up.	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, staff	Staff has researched the process for acquiring condemned properties for the use of affordable housing but further work is needed to determine incentives and possible policy changes.
NEW 3.8 View affordable housing creation and retention through a racial equity lens to address historical inequities and structural racism	A. Prioritize Affordable Housing Special Revenue Fund allocations for requests that benefit the extremely low-income and people of color.	FY2021	Affordable Housing Advisory Commission, Town Council, staff	1. Adjust the AHSRF application process to reflect priority for projects that benefit historically marginalized populations (in addition to seniors)
	B. Work with local partners to address affordable housing needs that disproportionately affect people of color and households with extremely low-income levels (as defined by HUD).	Ongoing	Affordable Housing Advisory Commission, Town Council, Orange County Affordable Housing Coalition, Orange County Collaborative, staff	1. Aligned emergency housing assistance program with the County and Towns and expanded assistance funding levels and frequency to better meet need 2. Use of CARES funds for emergency housing assistance 3. County developed an eviction diversion program
	C. Inclusion -Community Engagement and Education.	Ongoing	Affordable Housing Advisory Commission, Orange County Affordable Housing Coalition, Carrboro Neighborhood Liaisons, nonprofits, communications staff	1. Co-hosted Fair Housing Workshop in 2020 2. Awareness event in Oakwood in 2019



Neighborhood Liaisons

The Town of Carrboro is looking for residents who would like to share and exchange information between the Town and residents in their neighborhoods.

Register to be a Neighborhood Liaison at <https://www.townofcarrboro.org/FormCenter/Town-Managers-Office-20/Neighborhood-Liaisons-Registration-146>

Registered participants will receive information from the Town for redistribution to their neighbors in any form that works well for how they like to share within their communities – email, text, social media, fliers, or chatting by phone or over the backyard fence.

The program supports the Town Council's priority to improve Town engagement with all residents. It also aims to increase access to information, resources and civic processes for those who have been historically underrepresented in government decision making.

Designed to supplement the Town's existing communication channels, the program advances the Town's goals to exchange relevant information with the community and provide news and engagement opportunities that matter most to them. This is especially important during community emergencies such as the COVID-19 pandemic.

Carrboro residents are also encouraged to sign up for community news at www.townofcarrboro.org/signup and follow the Town's social media channels on Facebook, Twitter, Nextdoor and Instagram.

Register to be a Neighborhood Liaison at <https://www.townofcarrboro.org/FormCenter/Town-Managers-Office-20/Neighborhood-Liaisons-Registration-146>

For more information or to register by phone, contact Communications Manager Catherine Lazorko at clazorko@townofcarrboro.org

Pilot Application Process- Survey Results 2020

AHAC	Applicant Non-Profits
<p><u>Overall Satisfied</u></p> <ul style="list-style-type: none"> • Application provides useful information • Staff summaries helpful • Sharefile works for all • Application review (3x year) enough for most 	<p><u>Overall Satisfied</u></p> <ul style="list-style-type: none"> • Application easy to use and understand • Application allows project to be explained • Town staff are helpful and available to discuss applications • Current deadlines are mostly helpful
<p><u>Overall Dissatisfied</u></p> <ul style="list-style-type: none"> • Scoring rubric <ul style="list-style-type: none"> ○ criteria often did not match the project ○ used inconsistently ○ difficult to understand scoring values 	<p><u>Mixed Responses</u> (Would presenting applications to the AHAC be helpful?)</p> <p>1 – Extremely Helpful 1 – Very Helpful 1 – Somewhat Helpful 2 – Not Helpful</p>
<p><u>Suggestion</u></p> <ul style="list-style-type: none"> • Repeat applicants provide organization information only once/year 	<p><u>Suggestions</u></p> <ul style="list-style-type: none"> • Remove character limits or explain limit • Sections redundant – Projected Use of Funds and Project Description



Town of Carrboro
Affordable Housing Special Revenue Fund Application

OVERVIEW

The Town of Carrboro established an Affordable Housing Special Revenue Fund in 2007. The goal of the Affordable Housing Special Revenue Fund is to advance the Town's goal of increasing and improving the stock of affordable housing within Carrboro and its planning jurisdiction.

The Affordable Housing Task Force was established in 2012 for the purpose of creating recommendations for an affordable housing strategy. In June of 2014, this goal was accomplished when the then Board of Aldermen approved the Town's Affordable Housing Goals and Strategies document. From this work, an Affordable Housing Advisory Commission (AHAC) was formed in 2017. This Commission's responsibilities related to the fund include:

- Reviewing and making recommendations to the Town Council for new or revised policies regarding the operation of the Affordable Housing Fund;
- Reviewing and making recommendations to the Town Council on affordable housing funding applications.

With this in mind, requests for funding (as explained below) will be reviewed by the AHAC who will then make a recommendation to the Town Council regarding the request.

FUNDING

Source of Funds. The Affordable Housing Special Revenue Fund may be funded by payments made by developers in lieu of providing affordable housing units under the applicable provisions of the Land Use Ordinance. Other revenue sources for the fund may include grants, donations, loans, interest payments, or other contributions or assignments.

The principal and interest earned on funds received from developers, grants, donations, loans, interest payments, or other revenues that may become available also accrue to this fund. As the Affordable Housing Special Revenue Fund develops over time, it is anticipated that funding will be available for time-sensitive acquisition requests that arise outside the established funding cycles.

Since June 2018, the Town Council has passed two half cent property tax increases. For Fiscal Year 20-21 the Council has approved an amount equal to 1.5¢, which is an allocation of \$337,500.

APPROVAL

In 2018 the Town Council voted to allow the Town Manager to approve or deny funding applications for no more than \$5,000 or 15% of the existing fund, whichever is lower. These applications do not have to provide performance measures and can apply outside of the funding cycles.

Any requests over this threshold that are not appropriated by the Town Council during the budget cycle or by resolution will complete the following application. The application will be reviewed by the AHAC and their recommendation to approve or deny funding will go to the Town Council.

ELIGIBILITY

Nonprofits and nonprofits applying on behalf of individuals may request funds to be used to address projects that meet the Town's affordable housing goals. Please see our website for a list of local housing providers: <http://www.townofcarrboro.org/982/Affordable-Housing>

In order to qualify for participation in the Affordable Housing Special Revenue Fund process, the following criteria must be met by the beneficiaries (individuals), if applicable, and substantiated by the applicant (nonprofit organizations):

- a. Beneficiaries must be a resident of Carrboro or the Carrboro planning jurisdiction, or purchasing a home in Carrboro or the Carrboro planning jurisdiction;
- b. Beneficiaries must have a gross household income of 115% the Area Median Income or less, with priority given to households at 80% of AMI and below for homeowners, and 60% of AMI and below for renters, unless otherwise described (Please see Attachment A for current income limits.);
- c. Beneficiaries ~~or applicants~~ must be unable to obtain a loan, either subsidized or unsubsidized, on comparable terms and conditions;
- d. Beneficiaries or applicants must be the owner of the property in fee simple or leasehold estate and have paid or have appropriate arrangements with the county tax assessor to pay the tax bill, if the property is to be rehabilitated, or have clear title if the property is to be purchased or constructed;

Commented [AV1]: Note - Current guidelines, and in line with Chapel Hill.

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Commented [RB3]: This is odd – because whereas a applies to applicants – this only applies to certain projects...

Commented [AV4R3]: Original AHSRF guidelines allowed individuals to apply as well as nonprofits and clauses such as this only used the term "applicant" so it is ambiguous, although in reality I'm sure this clause was meant for individuals. Delete for clarity and current usage?

e. Beneficiaries must be residing in the property to be rehabilitated, or if purchased or constructed, occupy the property when the acquisition is completed. The building or affordable unit that is subject to program funding must have an anticipated life of at least 20 years after rehabilitation, or 30 years, if constructed or acquired;

f. Beneficiaries must also have an intact homeowner's insurance policy, if applicable.

PROJECT REPORTING AND MONITORING

Recipients of funds for development are required to submit written progress reports to the Town by the end of the fiscal year (June 30) to monitor progress and performance, financial and administrative management, and compliance with the terms of the performance agreements. Reporting information may include: progress toward achieving performance goals, description of activities/challenges, and revisions of proposed project timelines/budgets. Please submit annual reports electronically by June 30 to: amvanaman@townofcarrboro.org

Recipients of funds for home repairs/rehab are to submit details of work completed when submitting invoices for reimbursement of funds.

PERMITTED USES OF FUNDING

Development & Acquisition

Loans: 1. To guarantee the payment of loans or subsidize the interest rate on loans made by financial institutions to beneficiaries for the purpose of acquiring affordable housing.

2. To provide direct deferred payment loans to beneficiaries to supplement loans made by financial institutions for the purpose of acquiring affordable housing.

Land Banking: To assist in the purchase of land for conveyance to nonprofit affordable housing agencies.

Construction: To pay some or all of the expenses associated with the construction of affordable housing.

Acquisition: To acquire developed properties suitable for resale to individuals or families.

Pre-development Costs: To pay some or all of the pre-development costs (such as feasibility studies, appraisals, land options and preparation of an application) for projects to be developed for the purpose of providing rental or owner-occupied affordable housing.

Land Trust: To provide grants to organizations for land trust projects that guarantee long-term affordability of a property through a 99-year renewable ground leases or for maintenance of land trust housing stock.

Subsidy: To provide permanent subsidies to reduce the sale price of new or existing housing units so as to make them more affordable.

Repair, Rehabilitation, Weatherization & Preservation

- To provide for emergency home repairs of properties in the affordable housing stock. *
- ~~To provide for the weatherization of properties in the affordable housing stock.*~~
- To provide for the maintenance of properties in the affordable housing stock that are falling into ~~disrepair.*disrepair.*~~
- To guarantee the payment of loans or subsidize the interest rate on loans made by financial institutions to beneficiaries for the purpose of rehabilitating affordable housing.
- ~~To provide direct deferred payment loans to beneficiaries to supplement loans made by financial institutions for the purpose of rehabilitating affordable housing.]~~
- To provide grants or loans to nonprofits to avoid losing homes in the permanent affordable housing stock as a result of foreclosure.

Commented [AV5]: Expanded beyond Rehab to better reflect the work that occurs

Commented [RB6]: We're not using this – we are going through the preservation coalition for repairs and rehab. Can you envision us giving money to a person not working with one of those orgs?

Commented [AV7R6]: No, as we require individuals to apply through non-profits – this refers to an earlier time when the AHSRF was administered differently. Delete?

Housing Stabilization

Town of Carrboro Housing Stabilization Assistance funds are administered by Orange County through the Emergency Housing Assistance program. <https://orangecountync.gov/2359/Emergency-Housing-Assistance>

- To provide rental and/or utility deposit grants for Housing Choice Voucher, Permanent Supportive Housing (PSH), Rapid Re-housing, HUD-VASH and Housing Opportunities for Persons w/ AIDS (HOPWA) recipients relocating to rental units in Carrboro as a result of their current rental units no longer accepting a housing subsidy listed above.*
- To provide rental and/or utility deposit grants for those who have been assessed by the Coordinated Entry process as it relates to homelessness and have identified safe, decent, and affordable housing. *
- Assistance may be used for payment of security deposits, utility connections/~~arears, mortgage assistance~~ and/or rental payments given extenuating circumstances.*

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*Starred items requesting no more than \$5,000 or 15% of the existing fund, whichever is lower, do not have to provide performance measures and can apply outside of the funding cycles.

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FUNDING PRIORITIES

The fund is dedicated to the development and preservation of affordable housing. Priority goals include increasing the supply of affordable housing units, increasing the quality of housing stock while maintaining affordability, and helping people stay in the homes they have (both owners and renters).

Priority project areas include:

- Rental projects that serve households with incomes 60% and below the Area Median Income (AMI), with greater priority to those serving households with extremely low incomes.
- Homeownership projects that serve households with incomes 80% and below the AMI.
- **Projects that include:**
 - o Environmental conservation and stewardship
 - o Racial equity and social justice (—projects that address issues of historical inequities and structural racism)
 - o Housing for Seniors

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GENERAL APPLICATION INFORMATION AND PROCEDURES

Funding applications are accepted three times a year: October 1, January 1, and April 1. Funding is based on the availability of funds. Only as many funding cycles will be completed as necessary to use the available funds. All application documents should be submitted electronically to Anne-Marie Vanaman, amvanaman@townofcarrboro.org. Applications are reviewed by the Affordable Housing Advisory Commission and evaluated using a scoring rubric, which is available as Attachment C. The AHAC's recommendations for funding are then forwarded to the Town Council for final approval.

Commented [AV9]: Update language to reflect new score sheet once decided.

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CHECKLIST OF REQUIRED DOCUMENTATION

Application:

- Section 1: Applicant and Project Overview
- Section 2: Project Description
- Section 3: Performance Measurements*
- Section 4: Project Budget and Pro-forma
- Section 5: Agency Description
- Section 6: Disclosure of Potential Conflicts of Interest

Other Required Attachments:

Please provide one copy of each of the following documents (once per year):

- Current list of Board of Directors, including addresses, phone numbers, terms, and relevant affiliations
- Current Bylaws and Articles of Incorporation
- IRS tax determination letter [501(c)(3)] (if applicable)
- Most recent independent audit (if applicable)

Applications may not be considered for the following reasons:

1. Project does not align with the eligibility criteria for these funding sources
2. Applicant has demonstrated poor past performance in carrying out projects or complying with funding guidelines
3. Applicant fails to provide required information
4. Incomplete or late applications

*Starred items requesting no more than \$5,000 or 15% of the existing fund, whichever is lower, do not have to provide performance measures and can apply outside of the funding cycles.

PLEASE CALL OR EMAIL ANNE-MARIE VANAMAN OR REBECCA BUZZARD WITH FUNDING QUESTIONS:

919-918-7321 OR amvanaman@townofcarrboro.org 919-918-7438 OR rbuzzard@townofcarrboro.org

FUNDING APPLICATION

DATE: _____

Section 1: APPLICANT AND PROJECT OVERVIEW

A. Applicant Information

Applicant/Organization's Legal Name: _____

Primary Contact Person and Title: _____

Applicant/Organization's Physical Address: _____

Applicant/Organization's Mailing Address: _____

Telephone Number: _____

Email Address: _____

B. Project Information

Project Name: _____

Total Project Cost: _____

Total Amount of Funds Requested: _____

Please specify **which permitted use of funding is being requested** (as listed in Section 2: C.1.):

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Proposed Use of Funds Requested (provide a concise description of proposed project and how it meets the criteria of eligible uses):

Commented [AV10]: Per survey suggestion – see description section

To the best of my knowledge and belief all information and data in this application are true and current. The document has been duly authorized by the governing board of the applicant.

Signature: _____

Executive Director or other Authorized Signatory

Date

Section 2: PROJECT DESCRIPTION

Please provide a thorough description of the project (by answering the "who," "what," "when," and "where" questions about your project). **Do not assume the reader knows anything about the project.**

A. Project Name

1. Project Name: _____

B. "Who"

1. Who is the target population to be served and how will their needs be addressed through this project? If this is a repair or rehabilitation project, please address how the beneficiary meets eligibility requirements and provide substantiation, such as a deed, homeowner insurance policy statement, etc.

2. Please indicate the income of the beneficiaries (households) to be served through the proposed project. Please see **Attachment A** for the current income limits for the Durham-Chapel Hill MSA. Please also provide documented income data for the intended recipients, such as the most recent tax return, if submitting on behalf of an individual.

Commented [AV11]: Is this still necessary since the beneficiaries must provide documentation to qualify for the nonprofits themselves. Delete?

Income Group (Area Median Income)	Number of Beneficiaries	% of Total Beneficiaries
<30% of the AMI		
31%-60% of AMI		
61-80% of AMI		
81-100% of AMI		
101-115% of AMI		
TOTAL		

Income Group	Seniors (age 62+)	Children	Disability Present	Asian	Black	Hisp./ Latino	Mixed Race	Other	White
<30% of AMI									
31%-60% of AMI									

<i>61-80% of AMI</i>									
<i>81-100% of AMI</i>									
<i>101-115% of AMI</i>									
<i>TOTAL</i>									

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3. **Project Staff.** Please provide names of staff, contractors, and/or volunteers that will be involved with the project. Describe their responsibilities with the project and track record in successful completion of similar projects in the past:

C. "What"

1. **Type of Activity.** Please check the category under which your project falls.

- Acquisition
- Pre-development costs
- Rental subsidy
- Ownership subsidy
- New construction for homeownership
- New construction for rental
- Rehabilitation for owner-occupied or rental (including urgent repairs - see *)
- Land banking
- Grant to land trust
- Rental deposit / utility connection assistance (Max \$21,000 - see *)
- ~~Loan payment or loan subsidy~~
- Foreclosure assistance
- Other (specify): _____

Commented [AV12]: Delete since another application is used or keep?

Commented [AV13]: Still need this?

*Starred items requesting no more than \$5,000 or 15% of the existing fund, whichever is lower, do not have to provide performance measures and can apply outside of the funding cycles.

2. **Project Description.** Please provide a general overview of your project, including what you are planning to produce, how the requested funds will be used and how you are planning to carry out the project. Include how your project meets the criteria of eligible uses.

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D. "Where"

1. **Project Location.** Please be as specific as possible.

2. **Project Size (if applicable).** Please provide the size of development site: _____ acres

Please attach the following:

- Site map showing lot boundaries, locations of structure(s), and other site features
- General location map (at least 1/2 mile radius)

E. "When"

Attach a **detailed** timetable showing when each work task will be completed (e.g., planning; obtaining financial commitments; design; environmental review; bidding; loan closing; key milestones in construction; marketing; final inspection; occupancy; etc.)

F. Project Details

If the questions below are not applicable or the requested information is not currently available, please insert N/A.

1. Property Acquisition.

- a. Has your agency acquired real property in order to carry out the project, or is property acquisition planned? _____
- b. Is the property currently occupied? If so, attach a description of your plan to relocate.
- c. Please attach an appraisal of the property.

2. Construction/Rehabilitation Detail.

- a. How many units will be newly constructed?
- b. How many units will be rehabilitated?
- c. What is the square footage of each unit?
- d. What is the number of bedrooms in each unit?
- e. What is the number of bathrooms in each unit?
- f. How many units will have full ADA accessibility?
- g. Is the proposed project located in Carrboro Town limits, ETJ, or transitional area?
- h. Please attach the following:
 - Floor plan(s)
 - Elevation(s)
 - List of Energy Efficiency measures included in the project (if applicable)
 - List of Universal Design principles included in the project (if applicable)

3. Design, Affordability, Marketing, and Supportive Services.

- a. Describe any methods to ensure long-term affordability of housing units, including subsidy recapture, equity sharing, deed restrictions, etc.:
- b. What are the proposed rents (including utility costs) or sales prices for completed units?
- c. Explain your agency's process for marketing to ensure an adequate pool of income-eligible renters to buyers:

- d. Describe the use of **energy efficient principles**, universal design, and/or materials with extended life span.
- e. What supportive services, if any, will be provided through this project?

Section 3: PERFORMANCE MEASUREMENTS

A. Goals and Objectives

Please complete the following chart with information about the project's goals and objectives.

Goal/Objective	Measurement
<i>Ex: Provide housing for low- to moderate-income households.</i>	<i>Ex: By 2020, build ten units that are affordable to households earning less than 80%AMI.</i>
_____	_____
_____	_____
_____	_____

B. Alignment with Town Goals and adopted affordable housing strategies.

Please explain how the proposed project aligns with the Town Council Goals and adopted affordable housing strategies.

Section 4: PROJECT BUDGET AND PRO-FORMA

A. Project Budget

- Attach a **detailed project budget** in Excel format showing all sources and uses of funds. Indicate which funds are committed or pending and include the % of committed funds toward this project. Attach funding commitment letters where available or copies of funding applications previously submitted.
- Has an appraisal been conducted? If so, please attach.

B. Terms of Project Funding

Please specify the type of funding request for which you are applying:

Grant Loan

C. Pro-forma (for rental property only)

If you are developing a property for rent, please attach a 20-year pro-forma showing estimated income, expenses, net operating income, debt service, and cash flow.

Section 5: ORGANIZATION DESCRIPTION

If you have already provided this information on a previous application in the current fiscal year, you do not need to provide this information again.

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A. Organization

What is your organization's . . .

1. Mission statement?
2. Incorporation date (Month and Year)?
3. Estimated Total Agency Budget for this fiscal year? \$
4. Total number of agency staff (full time equivalents):

B. Organization Track Record and Community Support

Please describe your organization's experience and ability to carry out the proposed project, including:

1. Evidence of coordination of this application with other organizations to complement and/or support the proposed project
2. Involvement of intended beneficiaries of the project in the planning process
3. Past achievements in carrying out similar projects and evidence of successful record of meeting proposed budgets and timetables
4. Collaborative relationships with other agencies,
5. Plans to develop linkages with other programs and projects to coordinate activities so solutions are holistic and comprehensive
6. Any other features relating to organization capacity that you consider relevant, (i.e. property management experience, including accepting Section 8 Vouchers, etc.).

Section 6: DISCLOSURE OF POTENTIAL CONFLICTS OF INTEREST

Are any of the Board Members or employees of the agency which will be carrying out this project, or members of their immediate families, or their business associates:

- a) Employees of or closely related to employees of the Town of Carrboro
YES NO
- b) Members of or closely related to members of the governing bodies of Carrboro?
YES NO
- c) Current beneficiaries of the project/program for which funds are requested?

YES NO

d) Paid providers of goods or services to the program or having other financial interest in the program?

YES NO

If you have answered YES to any question, **please explain below**. The existence of a potential conflict of interest does not necessarily make the project ineligible for funding, but the existence of an **undisclosed** conflict may result in the termination of any grant awarded. _____

TOWN OF CARRBORO AHSRF APPLICATION SCORE SHEET

APPLICANT:

PROJECT TYPE:

TOWN AH GOALS ADDRESSED:

PROJECT ADDRESS:

PROJECT SUMMARY:

POPULATION SERVED:

TOTAL NUMBER ____

AMI ____ <30% ____ 31%-60% ____ 61-80% ____ 81-100% ____ 101-115%

RACE/ETHNICITY ____ Asian ____ Black ____ Hisp. /Latino ____ Mixed Race ____ Other ____ White

OF SENIORS PRESENT/ESTIMATED ____

OF CHILDREN PRESENT/ESTIMATED ____

WITH DISABILITY PRESENT ____

ENVIRONMENTAL IMPACT:

FUNDING RECOMMENDATION:

- FULLY FUND
- PARTIALLY FUND (Can include suggested amount or %) _____
- DO NOT FUND

Reviewer Explanation:

Reviewer Name: _____



TOWN OF CARRBORO

Affordable Housing Advisory Commission

301 West Main Street, Carrboro, North Carolina 27510

R E C O M M E N D A T I O N

AUGUST 19, 2020

Affordable Housing Goals and Strategies

Motion was made by _____, and seconded by _____, that the AHAC recommends that the Town Council consider the following addition to the Affordable Housing Goals and Strategies document:

Overarching Priority Goal:

3.8 View affordable housing creation and retention through a racial equity lens to address historical inequities and structural racism

Affordable Housing Special Revenue Fund

Application Process

Motion was made by _____, and seconded by _____, that the AHAC recommends that the Town Council consider the following changes to the Affordable Housing Special Revenue Fund application process:

VOTE:

YES: ()

ABSENT/EXCUSED: ()

NOES: ()

ABSTENTIONS: ()

By a unanimous show of hands, the AHAC membership also indicated that no members have any financial interests that would pose a conflict of interest to the adoption of this amendment.

(Chair)

(Date)



Rogers Road: *Mapping our Community's Future*

MAY 2016

The compilation of an intensive 9 month planning effort with community stakeholders to create a shared vision for Rogers Road development for the next 10 years & beyond

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Executive Summary

In July, 2015, Orange County and the Towns of Chapel Hill & Carrboro requested that the Jackson Center and RENA (Rogers-Eubanks Neighborhood Association) partner to facilitate a proactive community planning effort in the Rogers-Eubanks Neighborhood as sewer design and implementation makes progress.

Partners proceeded to collaborate following the “Community-First” organizing model, which involves community members as principal actors in assessing and determining the course of future planning. Extensive collaboration and consultation led to four goals for future development: **retain** long-term residents, **connect** us with each other and the larger community, **preserve** diversity for the future, and **respect** the natural environment. These in turn yielded a refined sense of charge and detailed recommendations. The collaborating partners are confident that the plans reflect a uniquely inclusive and informed process.

This document was created to be a guiding and a working reference for invested community members and government partners in dialogue about next steps and specific plans. Key to its success is the following set of principles, elaborated at the end of the document:

- **Follow** the four stipulated priorities for future development
- **Ensure** accountability for collaborative action
- **Maintain** open and consistent communication
- **Support** community-first planning



Primary Partners and Collaborators

RENA

In 2007, the socially cohesive and culturally rich Rogers-Eubanks community founded the Rogers Eubanks Neighborhood Association (RENA) to formalize a long-term ad hoc community alliance and movement. As a community organizing group, RENA needed a place to gather to provide a location for sharing of community resources and development programs. RENA organized social justice, service, and faith-based organizations in Orange County to form the Coalition to End Environmental Racism (CEER). This group works to create community-driven events, which bring residents of the impacted communities together for the education of the wider community (citizens and local government officials) about critical issues of environmental health and justice. RENA also seeks and strongly values partnerships with local universities, and has been engaged in four projects with partners at the Gillings School of Global Public Health at the University of North Carolina at Chapel Hill (UNC). RENA has successfully organized the neighborhood in victories to close the landfill, secure a community center, provide services for all neighborhood children, and secure water and sewer for the Historic Rogers Road community, among many other successes and victories.

Robert Campbell, David Caldwell, Larry Caldwell, Rose Caldwell, and Jasmine McClain are the lead RENA members on this planning effort.

The Jackson Center

The Jackson Center is a public history and community development center located at the gateway to the historic Northside of Chapel Hill, North Carolina. The mission of the Jackson Center is to honor, renew, and build community in the Northside and Pine Knolls neighborhoods of Chapel Hill/Carrboro. We want to make sure that the histories we hear, and the values and visions on which they are built, make a difference in communities now and for generations to come. Our work is rooted in oral history listening and realized along three primary lines of creative community development: organizing and advocacy for livable neighborhoods, youth and education, and celebration and connection. In 2011, the Jackson Center organized a coalition of dozens of organizations and hundreds of residents in an effort that led to the passage of a historic moratorium on development and community plan for Northside. This plan dramatically changed zoning and increased support for neighborhood efforts. Between 2012-2015, the Jackson Center played a critical role in planning efforts that led to UNC's \$3 million land bank loan to Self Help Credit Union, which is helping to create dozens of affordable housing units and facilitating neighbors' control over land decisions. The Jackson Center has partnered with RENA, Orange County, Chapel Hill, and Carrboro on community engagement and planning efforts from 2014-2016.

Hudson Vaughan and George Barrett are the lead Jackson Center staff on this project. Stephanie Barnes-Simms, a community planner and Executive Vice President of Self Help, serves as technical assistance to the Jackson Center on this project.

Tim Stallmann

Tim Stallmann is a freelance cartographer based in Durham, NC. His work focuses on using maps as tools to build community power around racial, economic and environmental justice. Tim has worked with the Jackson Center since its founding, and has also participated in the 2014 community survey project that produced *Historic and Vibrant Rogers Road*. His maps and his collaborations with the Counter-Cartographies Collective, of which he is a founding member, have been widely published and exhibited. Tim holds a Masters degrees in Mathematics and Geography from Duke University & UNC-CH, respectively. In addition to consulting, he also teaches map-making at the Center for Documentary Studies at Duke University. For more of his work, see www.tim-maps.com.

Community Unity Board

The Community Unity Board is a group of neighborhood leaders from all across the Rogers Road neighborhood. The Board was originally formed in 2013-2014 to bring together residents of all of the sub-neighborhoods of Rogers-Eubanks in ongoing dialogue and partnership. RENA & the Jackson Center re-initiated this board for this specific planning effort, inviting residents from various sub-neighborhoods to take a stake in Rogers Road's future and to be in ongoing dialogue with their neighbors. This group of nearly 20 residents, most of whom have been actively engaged in ongoing community efforts in Rogers Road, took part in 9 intensive meetings over the course of the last seven months and several additional consulting sessions and interviews.

Background and Process

For the last 9 months, a core of neighborhood residents and other key stakeholders have gathered for *intensive* dialogue about our hopes and fears for our community, the strengths and struggles of our history, and the diverse visions we have for the future of the Historic Rogers Road Community. We initially planned to participate in four intensive meetings over four months. In order to reach a variety of stakeholders and ensure sufficient discussion depth, we adapted this strategy to nine sessions focused on creating, reviewing, and strategizing together.



Neighbors in a discussion about land control and conservation.

Many of the primary stakeholders have participated in planning efforts for decades. Throughout the process in Rogers Road, we faced a great challenge together: the collective feeling - and reality among constituents - that planning efforts in Rogers Road have consistently fallen short on implementation. We discussed questions like: What is the point of this effort? Will the three governments respect our visions and actually help us achieve them? Will sewer really happen or is this process a trick to focus us on development instead? Will this just become another plan

shelved for people to reference in their articles about the struggles of Rogers Road?

While some of these questions remain, our dialogue about these questions led us to clarify our common understanding and our group's charge for moving forward. Our focus and group charge for the effort was *to work together to create:*

- A collective answer to the question of what would we like to see from any future development in the form of a crisp list of easy to explain priorities that we can remember.
- A map of our vision for future development/improvements. We are working on being able to describe both what we want and where we would like to see it happen
- A specific action plan that describes how we achieve our aspirations, including specific action steps, with "gives and gets," or realistic trade-offs, for neighbors, local governments, and developers

We used the model of Community-First Planning that that the Jackson Center developed for use in the ongoing Northside Neighborhood Initiative. This model is built on an intensive set of communication and organizing tools that bring neighbors and other stakeholders into active and realistic planning discussions focused on change that enhances community and regional goals. Unlike external, top-down, or selective representative processes, Community-First Planning features broad-based participation developed on the ground in direct communication with residents and stakeholders, "reverse-consultancy" leadership (funding for on-site existing community leaders as primary consultants), and a direction-setting group that remains accountable to community interests. Accordingly, RENA and the Jackson Center worked for

several months to identify major stakeholders, sub-neighborhood representatives, and neighbors who could bring an array of visions and opinions into dialogue with one another. We ultimately invited 19 people to participate in ongoing meetings together and asked them to take the ongoing questions back into their sub-neighborhoods to more intensively reach stakeholders who may not attend. We then conducted over a dozen additional interviews to incorporate perspectives of residents who were not able to be part of the stakeholder team. Because of Rogers Road's long history of neighborhood leadership and action, our process engages the strengths and struggles of history first and continually. Creative communication strategies are a central part of our work: we find ways to reach people the ways they best receive contact. We develop clear "gives and gets" strategy framework. We believe that discussing the benefits and challenges openly is the best way for communities to mobilize for movement forward, and we believe in building this infrastructure in a way that it can be utilized well beyond our active role.



Neighbors workshopping summary recommendations at an early meeting.

This is not the first effort at a plan for the Rogers Road neighborhood. As mentioned above, the neighborhood has long experienced marginalization from the political and planning process. Conventional decision-making has been for and about neighbors rather than with and by neighbors. We entered into this process well aware of the history of racial exclusion, and always with the nagging fear that the results of our efforts would be more of the same exclusion. In spite of that fear, we were willing to complete this Community-First planning effort because of the following:

- The assurance that sewer infrastructure would continue to move forward for Historic Rogers Road residents, and that a community effort was an important step in preparation for development speculation that might result with this new infrastructure
- The understanding that this effort would help guide future conversations about land use planning and development approvals, especially in the Greene Tract and on the Chapel Hill side of the neighborhood, given the recent change to an ETJ and concerns about future zoning decisions in Chapel Hill without prior input
- The desire to "get ahead" of the rising development pressure, given the growing concern in the neighborhood about what is happening all around the fringes of Rogers Road, especially the significant rise of new subdivision and townhouse developments on Homestead and Eubanks Rd
- The hope that we could create a guiding document together that would be immediately useful for us as residents and community partners

Part of how we approach planning is to engage differences and to value a diversity of community opinions, not to try to get rid of it or find absolute consensus. The materials and recommendations in this document do not "represent" all of Rogers Road. This process has engaged a wonderfully diverse set of neighbors in ongoing dialogue and sought to create a document that elaborates on shared visions; it includes differences and nuances that have enriched the discussions.

Summary Recommendations

These summary recommendations were created through a review of historical documents and processes and several Community Unity Board meetings. Once the Unity Board established a draft, this list of priorities was shared widely for feedback and revision: with their sub-neighborhoods, on the community listserv, through the community newspaper, and in individual interviews. The following is the result:

"We want development that we are a part of, not the victim of." -David Caldwell

We want development that...

Retains families who have lived here for decades/generations



- Supports owners in maintaining their homes and mitigating rising cost of living
- Creates economic opportunity for people living here
- Provides opportunities and services for elders to age in place/in the neighborhood

Connects us with each other and the larger community



- Improves bus service & roads, pathways, and sidewalks to connect us to key places and to one another
- Ensures new development opens to and connects with the existing community, avoiding internal fragmentation
- Promotes intercultural connection and multi-culturalism

Preserves socioeconomic & cultural diversity for the future



- Prioritizes the creation of diverse affordable home options
- Expands the community center and provides additional services for neighborhood children
- Ensures access to essential social and retail services
- Provides space for smaller local businesses to start-up and serve the local community

Respects the physical/natural character of the neighborhood



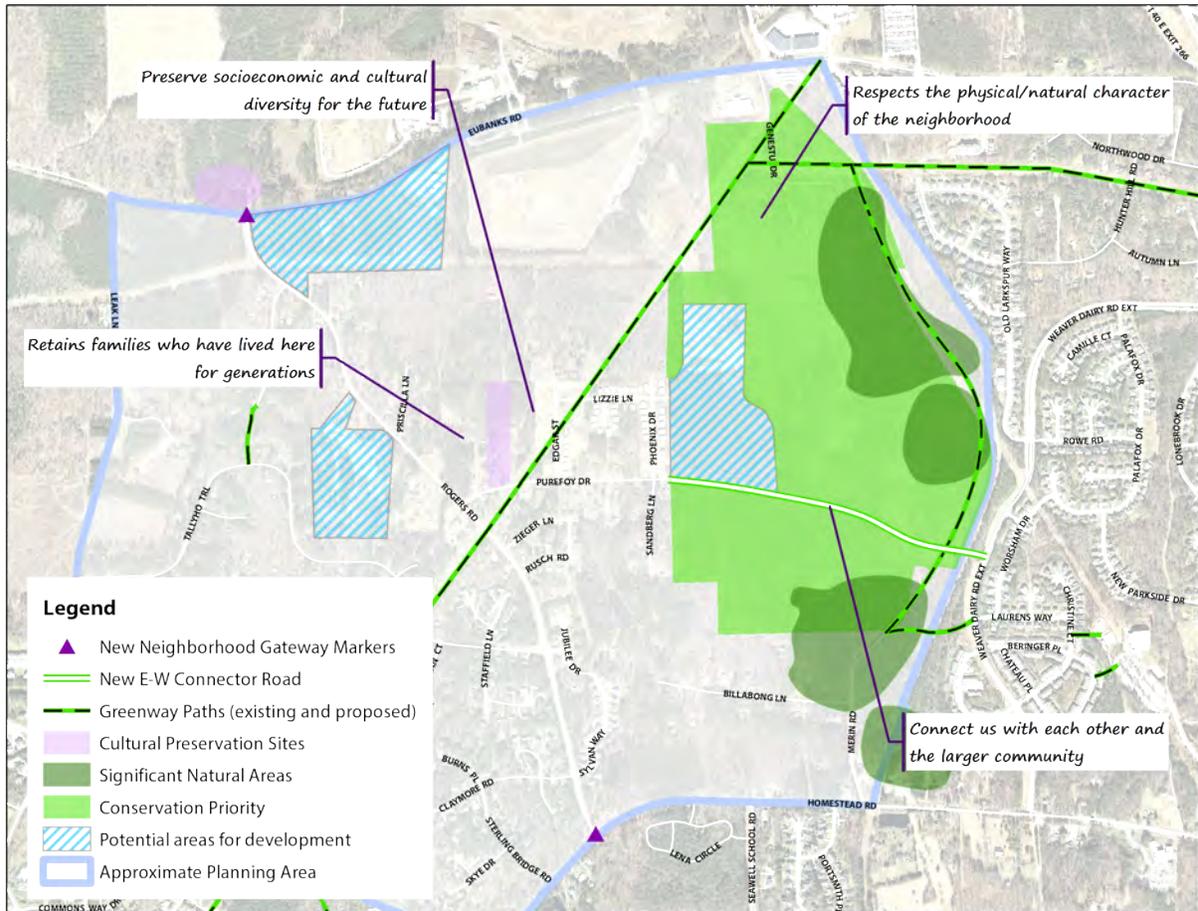
- Balances land conservation with density to reduce suburban sprawl
- Minimizes disruption to the natural landscape & opens environment to people's use and enjoyment
- Promotes design that fits into the character and fabric of the existing community
- Honors history and contributions of neighborhood in tangible ways

Detailed Recommendations

This section, organized into four guiding principles, provides specific suggestions and recommendations on ways that the Towns & County, neighborhood residents, and any future developers can realize the goals identified by Rogers Road residents.



Overview Map





Retain families who have lived here for decades/generations

Support homeowners in maintaining their homes and mitigating rising cost of living

Develop and fund home repair programs, especially to improve in-home accessibility for long-time residents. In the 2014 survey of the Historic 86 parcels, over 65% of households in the Historic Rogers Road area reported a need for some home repair support, including but not limited to: essential repairs of leaking roofs, broken HVAC systems, \$500 utility bills due to a lack of weatherization, and increasingly inaccessible houses for those who are aging and disabled. Given the scope of need, Rogers Road would be a great focus area for a targeted home repair effort by an organization like Habitat or Rebuilding Together, with support from the County and/or Towns. This effort should be proactive and utilize RENA's existing database of home repair needs.

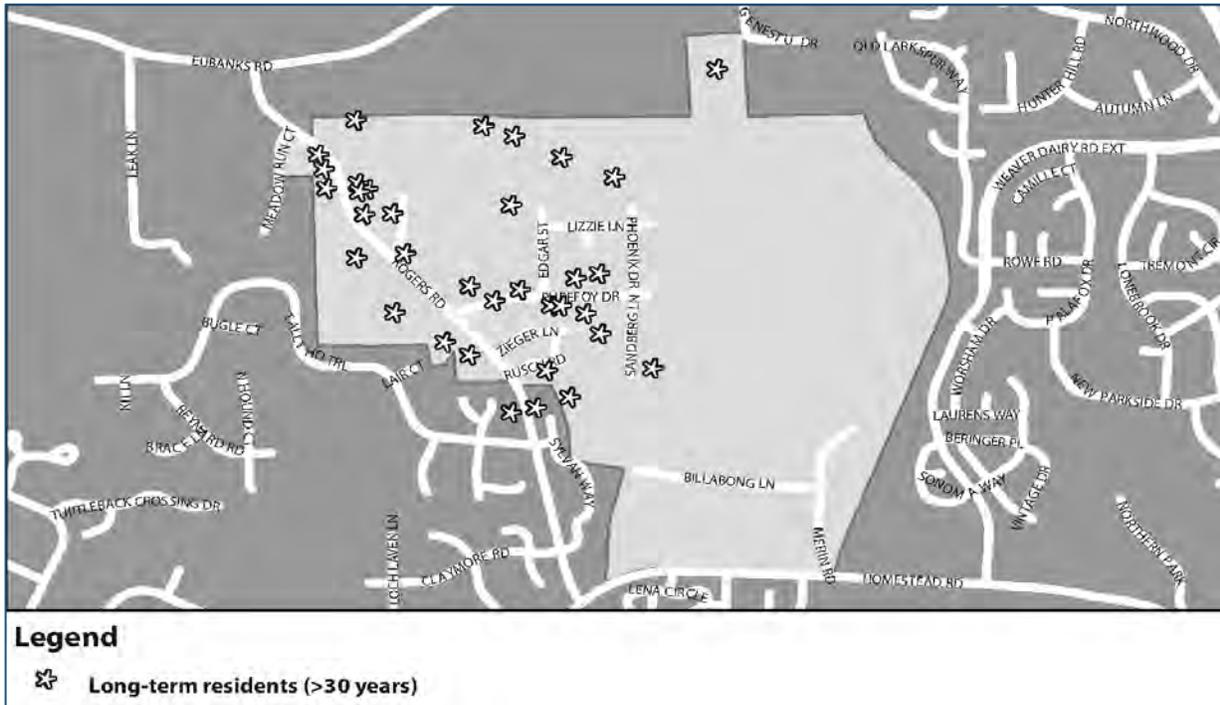
The County and Towns should create a unified fund for home repairs in Rogers Road so that neighbors' ability to get repairs is not dependent on where the house is located within the neighborhood. Currently, Rogers Road is split between Carrboro and Chapel Hill's ETJ, leaving the community in the middle of CDBG and other funding efforts. The County could take the lead to host a unified fund to address the challenge of the multiple jurisdictions.

Strengthen community organizing infrastructure by supporting the Rogers Road Community Center, especially to increase volunteer networks and provide sustainable presence in neighborhood. The Rogers Road Community Center has been a hub of action, but it needs regular operating support to continue to thrive.

Create property tax mitigation program for long-term neighbors to offset rising taxes as result of development. Durham is currently working on a proposal to offset the rise in taxes for elderly, low-income residents over a period of time due to rising property values. Given the potential of development speculation, a similar program should be implemented to limit the drastic increase in taxes that could result from development pressure, both for elderly low-income residents and their heirs. The County could also lead a proactive effort to ensure residents who qualify for the Homestead Exemption have this important tax exemption.

Support efforts to prevent land loss. Across the country, historically African American communities are losing land at a rapidly accelerating pace through investor speculation, heirs' property complications, and policies of exclusion. We are already beginning to partner with the Black Family Land Trust, Conservation Trust, and Center for Civil Rights to assist us, protecting land rights and use for future generations.

<p><i>Create economic opportunity for people living here</i></p>	<p>Utilize existing skills and leadership of residents. We, residents of Rogers Road, have a vast array of skills and experience: in engineering, business and non-profit management, construction, nursing, elder care, and more. Any jobs created through building and development should utilize existing skills and leadership of residents.</p> <p>Provide opportunity for community business ownership and management in new business spaces, especially any on publicly-owned land. Not all of us are interested in area retail, but all support the idea that, if there were to be any small, mixed use spaces, these spaces should be designed and structured in a way that provide true accessibility for community ownership and management.</p> <p>Consider updating zoning and signage restrictions to give more flexibility to community-owned businesses. Current zoning allows for some home-based businesses but restricts signage. Zoning and signage regulations should reflect the benefit that small, community-owned commercial spaces can bring to the neighborhood.</p>
<p><i>Provide opportunities and services for elders to age in place/in the neighborhood</i></p>	<p>Pursue a proactive effort for public-private partnership with model senior living, especially with Piedmont Health. Senior housing, independent but supportive, is a huge priority. The partner would need to be a provider/developer committed to serving neighborhood residents and affordable spaces, not simply high-end senior needs.</p> <p>Ensure zoning allows for elder development or services that increase livability and accessibility of these long-term neighbors. This is the one form of housing that residents, even those that were wary of any increase in density, were interested in finding a way to support.</p> <p>Support location of a community-health facility in the community. St. Paul's Village already has a proposed community-health center planned in partnership with Piedmont. Increased support from the governments to make this possible in the near future would be beneficial to all parties.</p>



Development Do's	Development Don'ts
<p>Senior housing: single story, primarily independent units (see design feel document); additional safety and accessibility needed if more than one story</p> <p>Community-commercial spaces near senior housing</p> <p>Housing for veterans and homes accessible to people with disabilities</p> <p>Co-housing model for shared services among community</p> <p>Community-health clinic</p> <p>Requirement of community benefits agreement for new development that includes tangible ways the new development will support neighborhood retention strategies</p>	<p>Development that will significantly raise area taxes without creating a tax mitigation plan in advance</p> <p>Development of new affordable units without significant investment in the repair of existing homes</p>



Connect¹ us with each other and the larger community

Improve bus service & roads, pathways, and sidewalks to connect us to key places and to one another

Build a new road into the Greene tract from the East, preferably one that utilizes existing pathways or clearings. New development on the tract – even just for recreational use – will increase traffic into the neighborhood, largely from the MLK Boulevard corridor. Purefoy Drive is not suited to handling through-traffic into the Greene tract at this level, nor should it be. Expanding this road without connection to the other side would endanger the neighborhood patterns, safety, and feel. The best design for a new road would connect Purefoy Drive on the West with Weaver Dairy Extension on the East, a route that passes through Town and County-owned land exclusively (except for the railroad crossing). An alternate route would be a North-South connector from Eubanks into the Greene tract.

Improve bus service to the neighborhood that connects with Timberlyne and employment centers. Chapel Hill Transit is already taking some steps in this direction, following on the heels of organizing by RENA and Justice United. The routes could still be improved to connect to essential retail services and employment centers.

Add bus shelters at the bus stops along Rogers Road. Currently, young children and elderly neighbors stand by the curb signs without any shelter from the rain or a bench to rest upon. Adding attractive bus shelters would improve safety, increase ridership, and improve aesthetics of Rogers Road. *This should be an immediate action in the near future.*

Create greenway and walking path improvements throughout the neighborhood. Residents recommended using existing utility easements as walking paths. These would ideally be unpaved and minimally improved to retain the rural feel of the neighborhood, but officially designating these as paths and adding signage would increase recreational opportunities for residents as well as aiding privacy since folks who are walking through the neighborhood would use walking paths rather than cutting through residential lots. Ideally, greenway improvements would allow pedestrian access – on walking paths or sidewalks the

¹ **Connectivity:** Connection is often limited to physical infrastructure. A new subdivision is sometimes considered “connected” if it ties into the main road and has access to Weaver Dairy, for example. The term here means more integration of spaces: connection that is physical, social, and cultural. Connectivity prioritizes historic Rogers Road residents and requires integration of new development into the existing fabric of the community.

whole way – from the neighborhood to Timberlyne and the MLK Boulevard area. Easements and existing pathways on Greene Tract should be made into walking trails or greenways that provide a walking loop through natural areas accessible to neighbors.

Improve sidewalks. Complete sidewalks on both sides of Rogers Road – this would improve walking access to bus stops and the community center and help keep children out of the road. Additional sidewalks should be networked with greenways to provide full range of connections through the neighborhood.

Increase traffic enforcement in the neighborhood. The blinking speed sign works well on Rogers Road but there is still a need for more police presence and speed reduction mechanisms on Rogers and Purefoy.

Consider adding traffic lights at the intersections of Rogers Road and Merin Road with Homestead Road. These intersections are difficult left-turns that are part of the daily commute of residents. Traffic lights or other measures to improve traffic flow would help safety and convenience. The Merin Road and Homestead intersection, unfortunately, presents some difficulties because of the railroad tracks immediately adjacent; we recognize that a traffic light may not be feasible there.

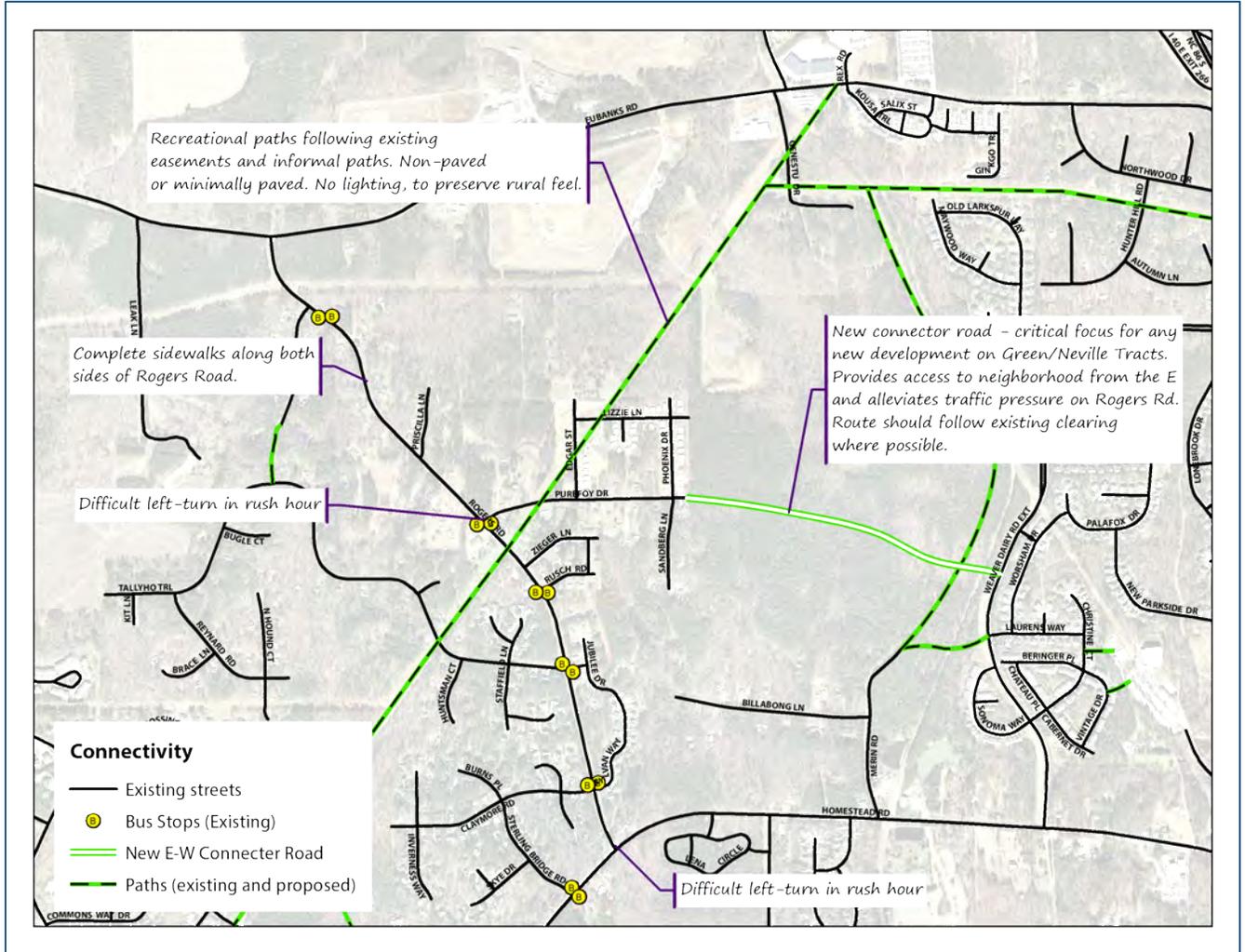
Ensure new development opens to and connects with the existing community, avoiding internal fragmentation

Require that new development have clear physical integration with existing neighborhood, increasing connection instead of segmenting it. The physical integration of Phoenix Place was a good example of this. The new Burch Kove development is a development that does NOT promote this kind of integration.

Ensure that any new development does not build walls/barriers; limit culs-de-sac where connection is possible. Rogers Road is a diverse and inclusive community, and we believe structures have the power to connect or divide us. Several years ago, there was a proposal to redevelop one of the large heirs property into a subdivision with a wall surrounding it and a set of culs-de-sac for the center of the development. This kind of exclusion should not be possible in future development.

Development should show clear integration with the existing fabric of the community and indicate ways it will enhance social connectivity. In our meetings, we discussed the problems of the social integration of Winmore and how residents of the affordable housing development within it are limited in their use of common facilities and do not feel connected or

	<p>welcome in the high-end space. Any new development in Rogers Road should be fully integrated and not create exclusive benefits for its own residents but instead contribute to community improvements and accessible recreation spaces.</p>
<p><i>Promote intercultural connection and multiculturalism</i></p>	<p>Increase space for community gatherings and support intercultural festivals and community events. We have always been a community of celebration. As our community has grown, we have continued to find ways to extend our festivals and community events to all who reside in Rogers Road and have a stake in its future.</p> <p>Add multi-lingual sign welcoming people to the neighborhood in the many languages of our community. Our community is one of the most ethnically diverse in the whole County. Signage should reflect and support this diversity in the major languages of our community. <i>This should be an immediate action item, integrated with the building of neighborhood gateways.</i></p> <p>Provide opportunities for multicultural businesses in any community-commercial spaces. This would take proactive engagement with the diverse groups of people who call Rogers Road home and would help make any such businesses successful.</p> <p>Provide educational opportunities about the community’s history. RENA has partnered with UNC to document our oral histories. These efforts can be expanded, sustained, and given space to be brought into dialogue with the broader community.</p>



In our meetings, residents associated connectivity with both positive and negative aspects. Road connectivity, done poorly, could come with the cost of increased traffic, and detract from the rural feel of Rogers Road, which is one of the assets all neighbors valued. One resident, in a mapping activity, drew a bicyclist riding down Eubanks Road and “biking right on past our neighborhood;” this illustration showcased the desire of many residents’ to keep the community feel of the neighborhood rather than add numbers of new outsiders using the land for recreation. For the most part, residents framed connectivity improvements as an if-then situation: if there were new development on the Greene tract area, then new road connections would be necessary so that Rogers Road doesn’t become overburdened.

Development Do's	Development Don'ts
<p>“When government builds something, there must be egress and access.”-Mr. Stroud.</p> <p>Extension of Purefoy Dr. into Greene Tract, connecting to Weaver Dairy Extension</p> <p>Extension of services. Ex. Buses</p> <p>Trails on existing pathways.</p> <p>Access to green spaces and nature, adding trails and greenways</p>	<p>Retail along Purefoy Dr without a road connection east.</p> <p>Development that would require the widening of Purefoy Drive.</p> <p>Development without expansion of road through Greene Tract. Fear of development if Purefoy remains the only point of access.</p> <p>GATES or WALLS! Fear of a closed community! Development should NOT make the original residents feel unwelcome in their own neighborhood.</p>



Preserve socioeconomic and cultural diversity for the future

Prioritize the creation of quality affordable homes

Maintain the level of socio-economic diversity of the existing community within any new residential buildings. This would require a higher percentage of affordable units than currently required for affordability (upwards of 25%). It would also necessitate a significant percentage of units accessible to households below 50% AMI.

Create affordable homes² for families. These homes should be accessible to 50% AMI, primarily with 3 br/2bth, and integrated with any market homes

Require median home price on a development to be accessible to the median income of the community. To maintain the socio-economic diversity, new development must provide a similar mix of housing accessible to a range of residents

Provide co-housing options for working class and elderly, with shared common spaces to decrease costs. Most co-housing models are primarily aimed for middle-upper income households, but the model could be for shared common spaces and modest density in Rogers Road should be primarily in the service of the elderly and working class

Consider requiring a community impact or racial equity impact study as part of the evaluation process for new development in the neighborhood. Development decisions should consider what impact the new development will have on the community as a whole.

² **Affordable Homes:** There is a difference between affordable housing and affordable homes, and “homes” is used purposefully here. Affordable homes necessitate a certain quality, wholeness, and connection with the community around them. Rogers Road has been home to generations of residents (indeed, over 80% of residents have historic ties to the community). Whatever new housing is built in the neighborhood must be suited for families (3 bedroom, 2 bath as the primary model, with a smaller model for elder housing) and also be integrated into the fabric of the existing community. A next generation of residents should want to live in these homes. Also, the standards for affordability used in new development should further the existing socio-economic diversity in the neighborhood (including a significant percentage of households earning below 50% AMI) – which will necessitate more careful and creative approaches than the standard 60-80% AMI metric.

Expand community center and provide additional services for neighborhood children

Add a wing to the community center or additional space in new school or other development to provide space as community grows.

If new development is approved, it should contribute significantly to the growth of shared community spaces, either financially or by creating spaces accessible to all. The development of a new school should also have to provide significant community space and benefits.

Increase services for children that serve both neighborhood children and provide job opportunities for residents. There is a great need for affordable daycares and spaces of recreation for high school age children. We have also heard talk for years of the possibility of a neighborhood school. Any actual proposal for a school should be planned in close dialogue with us and other neighbors, in order to address concerns about impact, equity, and connection to the community. Any services should utilize the wealth of educational leadership and teaching experience in the neighborhood.

Provide public park and recreation space. Currently, the only outdoor park is located within the Habitat community and is not a public space. This park should be made more accessible; additional land in the Greene Tract should also be preserved for public park use.

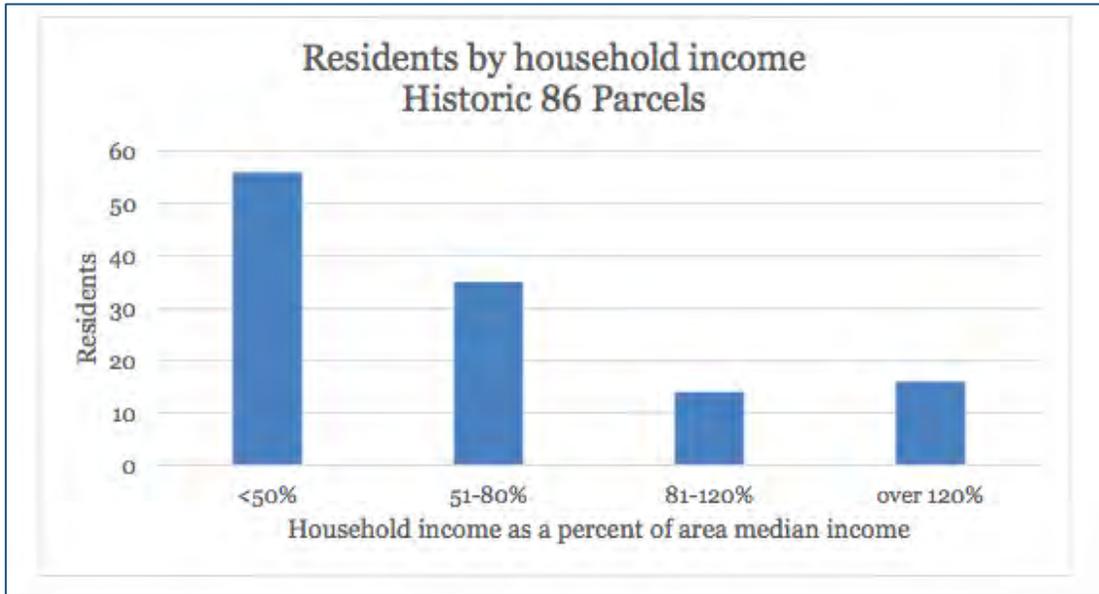
Ensure access to essential social and retail services, with a priority on community-commercial³

Provide distinctive areas within walking distance that can serve community commercial. Many of us would love to be able to walk to get essentials. Our maps show a few distinctive spaces accessible to the community in which this kind of commercial may be appropriate if economically viable.

Partner with agencies that have a track record in managing and operating community-based commercial. Who owns and manages any commercial will be critical to its success. If any retail is included on the Greene Tract, then the governments should be careful in partnering with trusted partners and maintaining some control over these spaces, consistent with community development principles.

³ **Community Commercial:** While there are a range of opinions about the presence of retail and commercial generally in the neighborhood, there was strong support for the existence of modest, community commercial spaces that allow for small, local businesses to serve the community. Examples given have included hair salons and barbershops, small ethnic restaurants, hardware store outposts, community health clinics, small outdoor markets, and kiosk-size spaces for short-term use (such as flower shops) to support entrepreneurship. We use the phrasing “community commercial” here to highlight that the goal is to serve the neighborhood, provide employment opportunities, and ensure that affordable commercial space is available long in the future. Meeting those goals will likely necessitate a different model from traditional commercial retail, either involving a nonprofit developer, subsidies, or both.

	<p>Create an economic development strategy that encourages the recruitment of businesses that will provide access to essentials. We discussed the desire for beauty salons and barbershops, ethnic restaurants, convenient stores, and small hardware stores. A strategy should promote and enable the right kind of community-connected economic development for the location, traffic flow, and population.</p> <p>Provide connections to job training and living wage jobs. Our young people have endless potential. New development, especially on the Greene Tract, should provide a diverse set of job trainings and living wage jobs that will help strengthen our community</p>
<p><i>Provide space for smaller local businesses to start-up and serve the neighborhood</i></p>	<p>Create smaller and more affordable business spaces, to keep costs lower and provide diverse opportunities. One example of this would be to allow for market-style kiosks for people to rent for shorter-term leases. Another example would be to create 4-6 small retail shops together on the right corridors. Smaller individualized business spaces allow for a more affordable entry needed for many local businesses to succeed.</p> <p>Provide special zoning for small community-based businesses and a wider range of home-based businesses. Current zoning does not allow for small, community-based businesses and limits home-based businesses significantly. We have marked locations in which this might be viable on the included maps.</p> <p>Ease signage regulations for churches and community-based businesses to have visible signage. The signage restrictions in Chapel Hill and Carrboro make it difficult for home-based businesses and churches to have decent signage.</p>



Development Do's	Development Don'ts
<p>Community commercial. Limit to 3-4 shops. Ex. Barbershops, Beauty supplies, family owned business.</p> <p>Affordable Homes: Workforce, teachers, early career, and seniors. Affordability defined as who can access housing.</p> <p>Daycares, parks, and community center expansion: spaces for neighborhood children</p> <p>Diversity of housing: not one housing type. Variety in design. Connects to the variety of housing that exists within the neighborhood.</p> <p>Single-family style for affordable housing</p>	<p>Development catered to one demographic</p> <p>Large-scale commercial. Big businesses (Supercenters) a consistent fear. Ex. Timberlyne borders on being too large for this community; Walmart/Target are way too large.</p> <p>Development that provides destination retail or attracts large amounts of people from outside of the community (would add too much traffic).</p> <p>Gathering space with only one point of access</p>



Respect the history and physical/natural character of the neighborhood

Balance land conservation⁴ with modest density to reduce suburban sprawl

Respect identified areas of land conservation through conservation easements and other appropriate protections. Currently, areas with a priority of conservation are not formally protected. Conservation easements for large parts of the Greene Tract and for heirs property (where owners desire them) could help achieve some of the long-term hopes of maintaining large portions of the natural surroundings.

Designate specific areas for modest density, to increase diversity of opportunity. We do not want the suburban sprawl taking place on the fringes of Rogers Road. Designated areas for modest density, crafted carefully, could increase diversity of opportunity & affordability, limit land disturbance, and support the mixed community so many of us desire.

Minimize disruption to natural landscape & opens environment to people's use and enjoyment

Maintain a wooded buffer on the eastern edge of the Sandberg Lane portion of the neighborhood. Residents along this gravel road have long enjoyed the privacy that comes from their sparsely-developed neighborhood, and any new development in the Greene Tract should not infringe on that.

Ensure that large parts (80%) of the Greene tract are permanently preserved as open, natural, space. We, and many other community members, have long used the Greene tract for recreation, education, enjoyment and even as a food supply. This vacant land is a unique opportunity for residents, working with local government and groups such as the Black Family Land Trust and the Conservation

⁴ **Conservation:** The undeveloped land in Rogers Road is not vacant: to the contrary it has a wealth of value for residents of Rogers Road and surrounding communities. For generations this land has played an important role as a site for recreation, for gathering food, and for contemplation. Conservation on the tract should acknowledge and build on this cultural value without disturbing the rural feel of the area – not creating a sectioned-off or walled-off part of the community, but keeping large portions of these lands open for enjoyment and connection to the natural world, while protecting this special environment. Promoting “development that we are a part of, not the victim of” means honoring, preserving and amplifying the cultural and natural assets held by the Rogers Road community. This community aim is detailed under the rubric of conservation. However, as the glossary discusses, conservation in this context has a much broader meaning than the strictly environmental preservation, which has often been a strong consideration in planning decisions for Chapel Hill, Carrboro and Orange County.

	<p>Trust for North Carolina to devise an innovative conservation plan which centers the value of the land to the area’s Black residents. Already, residents have identified a few areas for special conservation priority, which are sketched on the map, but more field-work is needed to specifically identify their boundaries.</p> <p>Limit how much clearing of land is possible. Some developments have limited the clear cutting of land and ensured a large portion of existing trees remain. This would be our preference. Additionally, some development possible in the Greene Tract could be shifted north to the Neville Tract to utilize existing cleared land and allow for increased conservation of woodlands and wetlands.</p>
<p><i>Honor history⁵ and contributions of neighborhood in tangible ways</i></p>	<p>Add gateway markers on the northern and southern ends of Rogers Road to honor the neighborhood and celebrate those intersections as entrances to a culturally significant, historically African-American neighborhood. Some of Orange County’s most well-known brick and rock masons are connected to the Historic Rogers Road community. These and other legacies should be honored.</p> <p>Identify & preserve slave graves and other historically significant sites. Marked as cultural preservation sites in previous planning efforts, these historic areas have still been overlooked. The graves of enslaved Africans are sacred sites and need to be identified and honored with markers and continued preservation. If these graves cannot be found, a memorial should be created in their honor. These efforts should include neighborhood leadership throughout the entire process: both in deciding how to identify and research these sites in a culturally sensitive way and in deciding how best to honor them. St. Paul’s church is exploring some ways to do this with respect to sites on land they own.</p> <p>Add signage that identifies this as “Historic Rogers Road” and Integrate community-specific historical markers throughout the neighborhood. Rogers Road community has a rich history, which is rooted in place, but often not immediately visible to passersby or visitors to the neighborhood. Marking this history can be a way of preserving it for the future.</p>

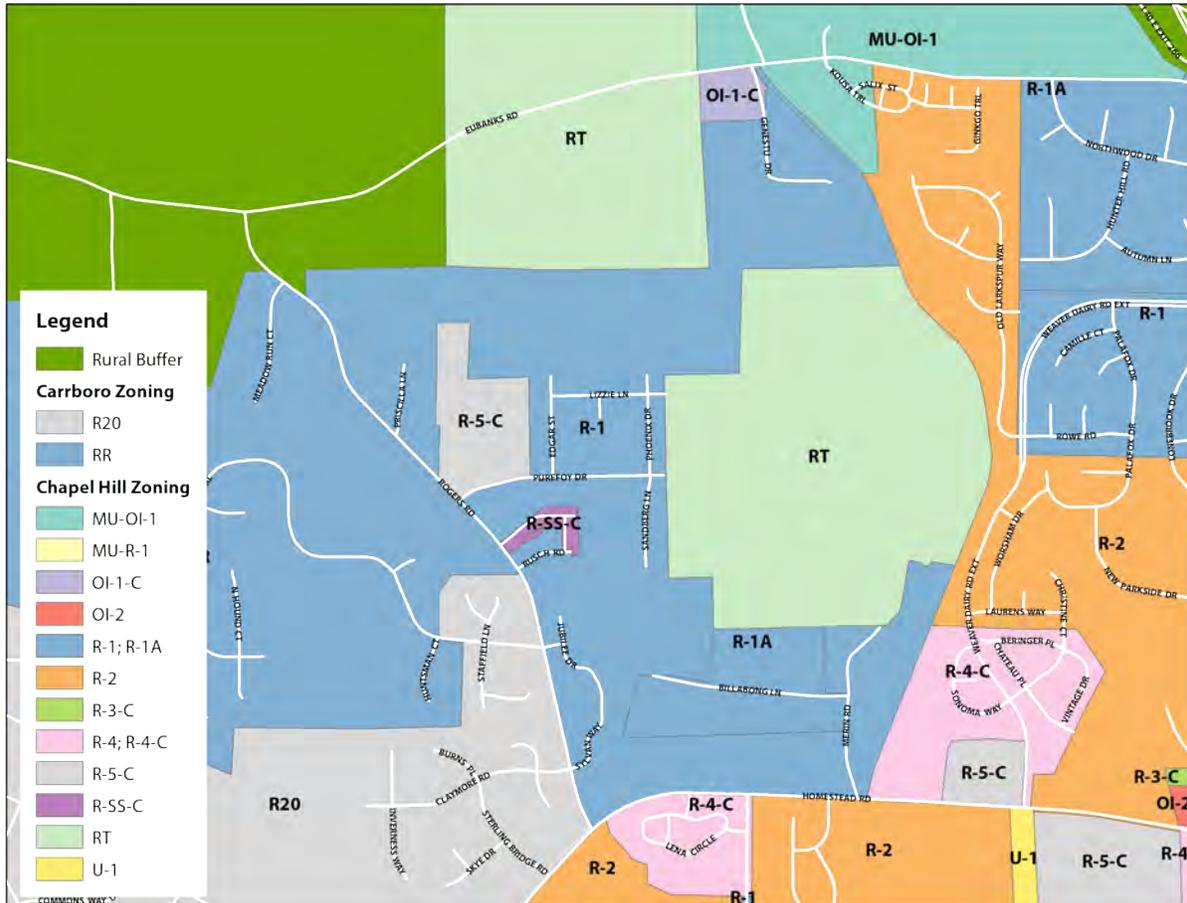
⁵ **Honors history:** Honoring history in tangible ways refers to more than just physical markers, signage, and history exhibits, although these are important. It also means that any development must show alignment with community goals and be something historic Rogers Road residents take pride in.

Preserves diversity: To continue to promote and ensure the existing diversity into the future; to further the remarkable socioeconomic and cultural diversity that is already present in Rogers Road.

Development Do's	Development Dont's
<p>“Preservation means leaving it the way it is, but making it also accessible to the public.” - Carl Purefoy</p> <p>Gradual Process. Integrated design.</p> <p>Greene Tract: High priority for preservation. Dense development - not too much. Infuse with existing characteristics of natural environment.</p> <p>Development on Neville Tract instead of southwest area of Greene Tract. Utilize the existing clearing on the Neville Tract to preserve more wetland and forest</p> <p>Development accompanied by buffers.</p> <p>Development consistent with historic vision and existing neighborhood character (including height, diversity of building materials & types)</p> <p>Community Markers: Historical markers. Preservation of slave graves. Cherry Orchard.</p> <p>Requirement of community impact study for any major development before approval</p> <p>Privacy: “Being able to go out in your bathrobe without being watched”- Ms. Reid</p>	<p>Businesses that interfere with surrounding homeowners. Fear of strangers invading property.</p> <p>Development that destroys community feel.</p> <p>Removal of the historic community & existing street names. Fear that new development will seek to wipe out historical names.</p> <p>Block flow of streams and water run-off. Fear of flood areas during intense rainstorms.</p> <p>Removal of significant woods in the Greene Tract</p> <p>Large multi-story housing developments. This takes away from the family feel. (ex. Greenbridge)</p> <p>Mini-mansions</p> <p>Large amounts of artificial lights</p> <p>Suburban sprawl. (Burch Kove, Homestead).</p> <p>3+ floors for housing</p>

Tools for Action

A. Zoning

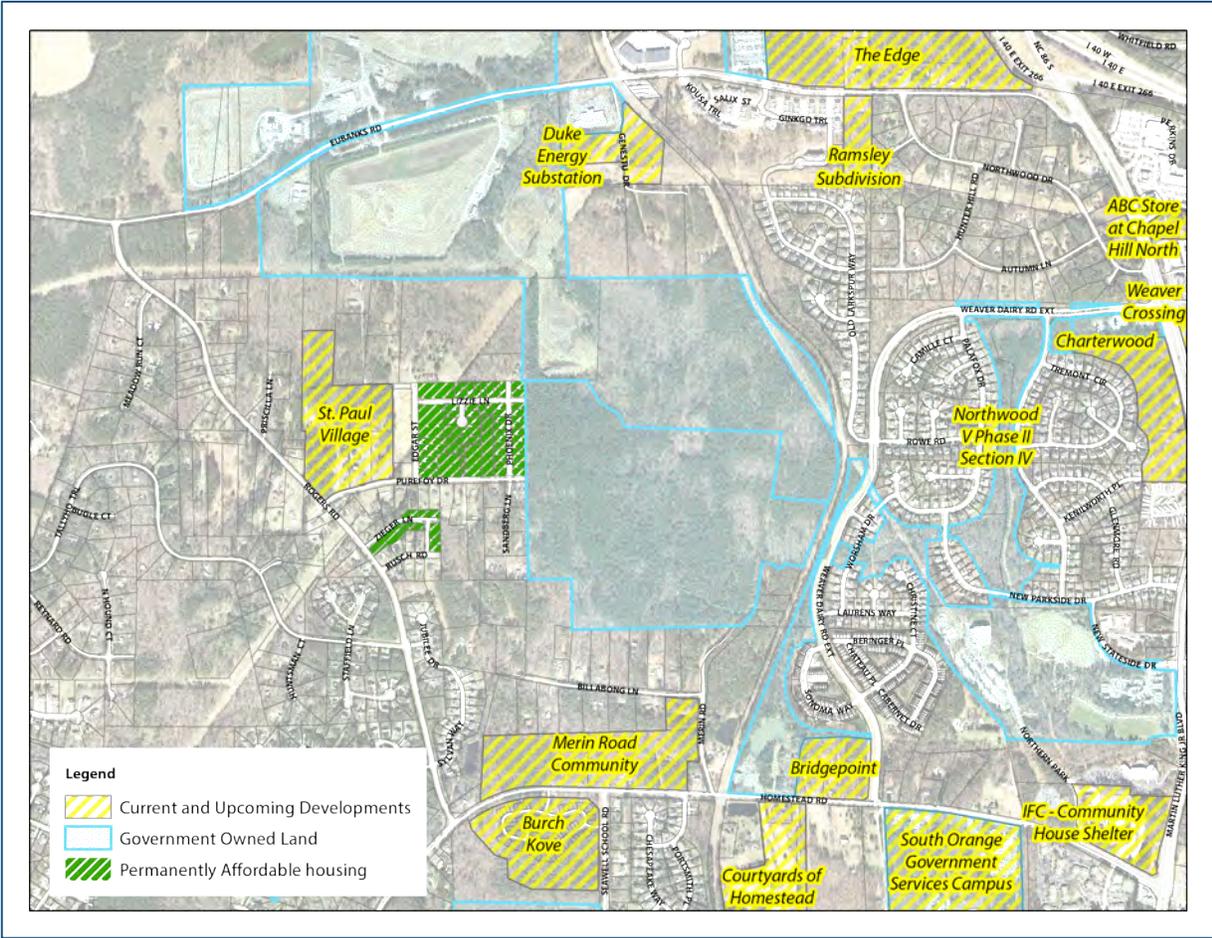


As the map above shows, the Rogers Road neighborhood is mostly zoned Chapel Hill R-1/R-1A or Carrboro RR, zoning classes which allow up to 3 units per acre and lot sizes as low as 17,000 square feet. This existing zoning allows development-by-right of a kind that is potentially inappropriate for the community. The upcoming Merin Road development on the neighborhood’s outskirts – which conforms with the density of R-1 but has lower lot sizes – matches pretty well with what residents described as one of their worst fears for new development in the neighborhood (the others being mini-mansions and monolithic mixed-use developments like Greenbridge or Meadowmont). Residential areas should be zoned in a way which imposes more specific limits than R-1 or RR on both square footage and density, (perhaps a minimum lot size of 30,000 square feet) by default, but which increases neighborhood input throughout the development review process and allows for exceptions with the neighborhood’s approval. On the Chapel Hill side, this could potentially be done through a Neighborhood Conservation District.

The Greene Tract is currently zoned in a way (RT) which would allow for development matching residents worst fears – in this case an expanded landfill (albeit with a special use permit requirement). Conservation of the Greene Tract will likely need to take place through conservation easements rather than zoning.

B. Land Use

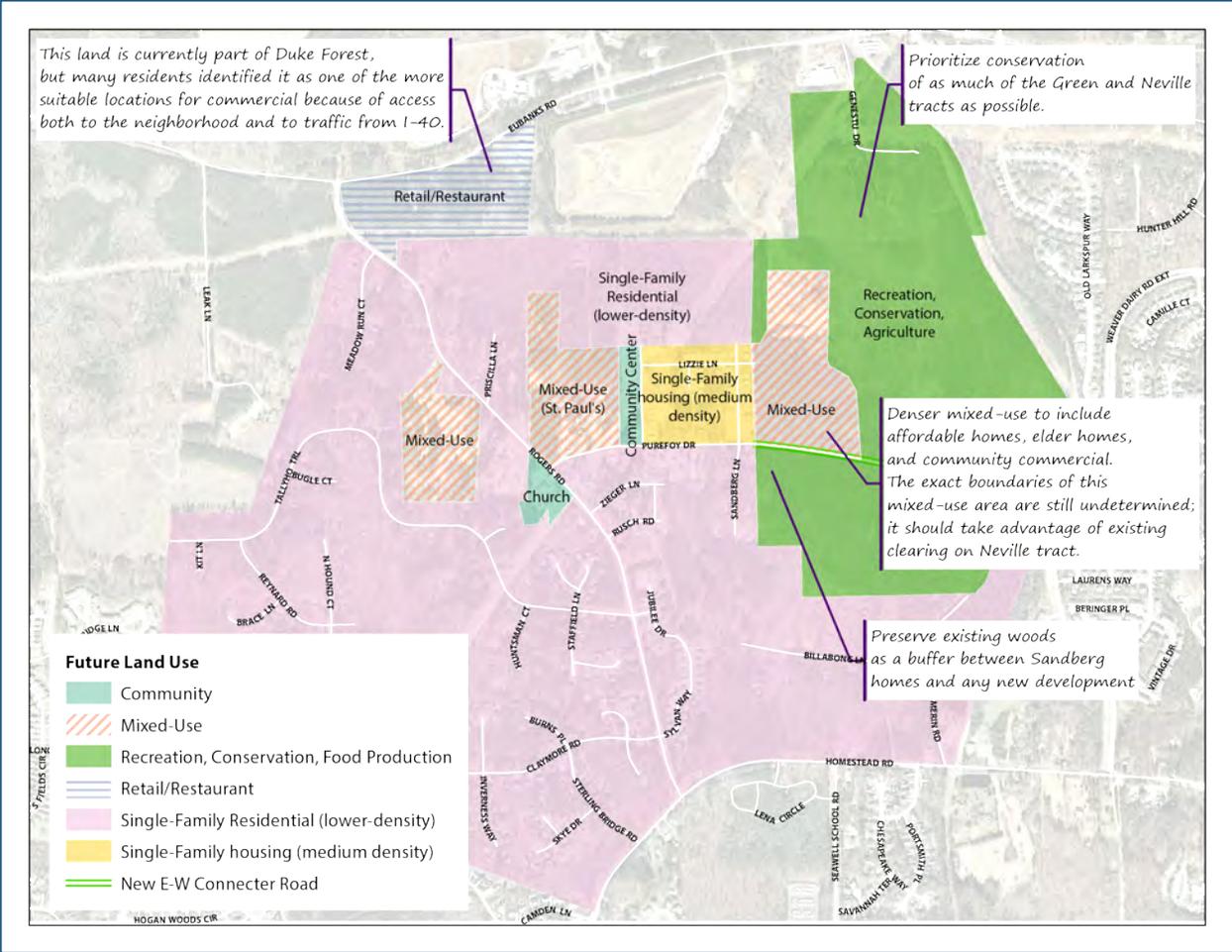
The Rogers Road neighborhood is already surrounded by new development (see map below), and the development pressure will only increase once OWASA finishes providing sewer service. Therefore, one of the main charges of our discussion was identifying place-based desires for future development and land use in the neighborhood. Some of these are discussed in more detail in the Do’s and Don’ts section of the report.



It is important to highlight that discussions about future land use and development in the Rogers Road area take place in the context of intense development pressure. In many of our discussions about development, residents framed their comments in terms like “if we have to have new development, then ...” The unfortunate history of Rogers Road is largely a history of development decisions being made for

rather than by the neighborhood’s residents, and that legacy makes it hard to have real visionary conversations about what residents want. Probably the most important land use and zoning priority for Rogers Road is not any specific use or zoning class, but strengthening neighborhood decision-making and voice in any new development.

This map highlights future land use classes identified by residents for different areas of the neighborhood, described below in more detail.



Low-density residential

Historically, most of the neighborhood has been low-density single-family residential – lot sizes of 1 acre and above, with most houses below 2,000 square feet. More important than specific lot size, building size and density requirements, however, is that any new residential development in the historic neighborhood preserves the “neighborhood feel.” This means:

- New homes which are affordable for homeowners and/or renters with incomes as low as 40 - 60% of AMI

- Individually-built homes which face the neighborhood and integrate into the existing landscape (rather than subdivisions or pocket neighborhoods)
- Houses which are open to the community, not fenced off

Mixed Use (Greene Tract)

Some residents are opposed to any development on the Greene Tract, whereas others see it as an opportunity for new building which serves the needs of the neighborhoods. In this report, we've identified an area on the western side of the tract, neighboring the existing Phoenix Place development, as the best area for development if the tract is to be developed at all. The Phoenix Place Habitat development, with lot sizes between 7,000 and 7,500 square feet, is the most-densely developed area in the neighborhood, and residents identified that density as about the maximum appropriate density for Greene Tract development as well. Those residents who did support development supported somewhat denser mixed-use development here, incorporating neighborhood commercial, senior housing, affordable housing, and new community spaces to serve neighborhood teenagers and/or seniors.

Mixed Use (Buddha, LLC land west of Rogers Road)

This was another area which was less-controversially identified as a potential site for denser mixed-use development. In contrast to the Greene Tract, where a village center feel would be more appropriate, residents preferred a shopping plaza-style development here, which could incorporate small retail establishments serving the neighborhood (examples include a convenience store, hardware store, barber shop or beauty salon) as well as offices and potentially a police or fire substation. Another option for this area would be a senior housing development.

C. Design Feel

We used dozens of examples of each development type mentioned in the strategies above from cities and towns around the country, and Unity Board members responded to the “fit” of these examples for Rogers Road. These photographic examples were not meant as development proposals or to get a clear architectural design but to try to understand general vision and feel of what residents meant when discussing “senior housing,” “mixed-use,” and “modest-density affordable housing.” The following few pages show highlighted examples from these discussions.

Senior Housing

Residents expressed the desire to prioritize senior housing throughout the discussions of any future development, particularly affordable, independent units for seniors who hope to age within the community. We showed a set of photographs of a range of senior housing developments across the country, asking which felt like it fit most into the “fabric” of Rogers Road.

A few common themes among the examples that residents thought had the best “fit”: they were single story, independent units that could be attached but opened to the existing community. Several people mentioned the Town of Chapel Hill’s senior housing on South Roberson or Habitat’s senior housing duplexes on Rusch Road as positive examples locally of senior housing of the right scale and design.

Generally considered to “fit”



This example was the most popular, partly because residents overwhelmingly support single-story senior housing. Residents liked the scale, individual units for seniors, small yards and stoops. Some thought it looked too much like public housing, though, and thought a true fit would be better designed

Mixed responses



This photograph had a mixture of responses. Those who liked it mostly commented on the design and scale. Most who did not commented on the institutional look and inward facing courtyard that did not seem to fit in with Rogers Road rural feel.

Absolute “NO!”



Pictures like this one that were multi-story nursing or assisted living facilities were not considered a fit, mostly because of the scale, the institutional look, and the feeling that it didn’t fit as well with the rural feel and independent living most seniors here want to see promoted in the community.

Higher Density Residential with Significant Affordable Component

Affordable homes are an important component of any future development in Rogers Road. But how these are designed, integrated into and connected to the community is critical. Participants responded to photographs of a mixture of mid to higher density residential development that included all or significant percentages of affordable housing as defined by HUD. Discussion about these responses made the following clear:

- Residents are interested in affordable homes, not just affordable housing, and preferred the scale of existing Habitat homes or the photograph on the top below best (1 to 1.5 stories were by far most popular) because they were “family-friendly”
- Any increase in density must still fit into the fabric, and most photographs of planned developments do not fit into the natural feel of the neighborhood
- Most participants did not like the “apartment” feel, and preferred either detached homes or carefully integrated single-story attached units

Generally considered to “fit”

The photograph of a co-housing development to the right received the most positive “feel” of the more than dozen photographs (just over 60%), mostly because of the scale and better integration of natural surroundings.



Mixed responses



Half of participants thought the example developments above could fit into the existing community. It seemed this was due more to the right scale of development rather than the actual design, as many commented on the desire for more unique units with more privacy.

Absolute "NO!"

Pictures like the ones below and to the right received unanimous "no," again, mostly because of the scale. The examples on the top were considered too suburban and the one on the bottom was considered too urban and institutional.



Mixed Use and Retail

Many participants, though not all, welcomed the idea of Community Commercial/Retail on a few specific sites if economically feasible. While participants expressed a range of opinions on whether this could work, most were interested in the possibility of small-scale retail spaces that were walkable. We explored the meaning of this with a range of photographs of commercial and mixed use. Common themes: 1) No more than 2 stories, 2) 4-6 shops max, 3) integrated into the design fabric of the community

More than 50% considered a “fit”

The photos below received just a bit more than half of respondents who felt like these examples could fit in, mostly because of the scale and the integration into residential community life.



Mixed responses

Around 50% found the structures in the photos below could fit in. Comments on the left photograph suggested that the retail spaces were small enough to include a range of options but many did not like the “strip-mall” feel of the parking. The right photo was one of the only mixed-use that did not receive overwhelming “no”, likely because of the smaller scale.



Absolute “NO!”

Pictures like the below received unanimous dislike: too urban, too large, or too suburban.



Principles for Future Action

Support a community owned process that the community is “a part of, not the victim of.”

A. Follow the stipulated priorities for future development

The priorities identified in this report should be considered the platform for development in Rogers Road. Rather than a step-by-step guide to development, this planning process established a guiding list of crisp and clear priorities for the future.

B. Ensure accountability

One of the main concerns we heard throughout the process was “Even if we do all this work, how are we going to ensure that the powers that be (local governments and developers) will listen?”. Decades of broken promises and countless, so-called community processes have left an accountability gap between the residents of Rogers Road and the Towns and County. Rebuilding trust will come through sustained efforts to increase accountability.

As resident Marian Peppers puts it, “Tell the town to fix it. Just fix it.”

C. Maintain open and consistent communication

During our process, we learned about a concurrent meeting among campaigning county commissioners regarding future development of the Greene Tract. Neither RENA leaders nor residents were asked for input; their perspectives were not engaged in discussion. This is the kind of failure of coordinated communication processes that leads to breakdown. To ensure planning that is effective for all concerned, residents of Rogers Road should be involved in all related conversations out of the gate. The absence of community members builds further distrust between residents and local municipalities. Conversations involving decision-making bodies would aid in building a bridge of trust between local municipalities and Rogers Road residents, with the ultimate goal of "win-win." Any future action should reflect direct and immediate integration of perspectives of RENA leaders and residents.

D. Support Community-First Planning

Community-First planning came through honest and tense dialogue with the long term and historic residents of Rogers Road. The community is dynamic, with diverse opinions that work to create complicated plans. At the end of the process, we could not say with one voice, for example, “Rogers Road wants a small scale commercial development to happen in the Greene Tract.” The process did not, at this stage, produce consensus but it did engage points of view that may otherwise have been buried under external assumptions about "the" community's point of view.

Often, even community-oriented developers justify taking action without more input by saying that community members are tired of more meetings, or don't have time for process. This is simply not the case in the Rogers Road neighborhood. Given appropriate planning for availability and direct communication strategies, residents tirelessly showed up to meeting after meeting, and have been doing so for over 30 years. Needs and desires in the neighborhood are highly contextual, and change over time. This document is testament to the value of inclusive, honest, ongoing dialogue. However, it represents a starting point only for a development process that must continue to engage residents in determining the future of the Historic Rogers Road Neighborhood.

Rogers Road has the necessary resources for effective Community-First planning. The Community Unity Board is expanding. Members have consistently brought over 20 residents to community meetings, and organized in-home conversations with the neighbors on their street. RENA has produced a monthly Baja Newsletter via the work of the RENA interns. Neighbors have been able to articulate their diverse place-based hopes for various potential spaces for development.

The Town of Chapel Hill, the Town of Carrboro, and Orange County have a unique opportunity to proceed on development planning in coordination with residents that will meet municipal, county, and community goals and set a model for development that is directly responsive not only to the history but to the vision of its constituents.

Appendices

Appendix A. List of Unity Board Members/Participants

David Bellin* (Tallyho)	Tim Peppers* (Rogers Rd)
David Caldwell* (RENA, Rogers Road)	Carl Purefoy, Sr.* (Purefoy Dr)
Larry Caldwell* (RENA intern, Rusch Rd)	Karen Reid* (Sandberg Ln)
Rose Caldwell* (RENA, Rogers Road)	Jimmy Rogers* (Edgar/Purefoy)
Robert Campbell* (RENA, Purefoy Dr.)	Nancy Rogers* (Edgar/Purefoy)
Sally Council* (Billabong neighborhood)	Shirley Sharpe* (Rogers Road)
Rev. Lisa Fischbeck (Church of the Advocate)	Jeannie Stroud* (Rogers Road)
Jasmine McClain* (RENA intern, Rogers Rd)	Laura Wenzel* (Tallyho neighborhood)
Rev. Thomas Nixon (St. Paul's)	Bishop Ila McMillan* (Faith Tabernacle)
Marion Peppers* (Phoenix Place)	

*indicates a neighborhood resident

List of Additional Participants/Interviewees/Neighborhood Consultants

Larry Reid* (Sandberg)	Lillie Brown* (Rogers Road)
Linda Allen (Rogers Road)	Beverly Ferreiro* (Billabong)
Malwood Revels* (Sandberg)	Georgia Revels* (Sandberg)
Quiana Phillips* (Phoenix Pl)	Leander Stroud* (Rogers Rd)
Ebi Joelin * (Billabong)	Courtney Gray* (Purefoy)
Burnice Hackney (St. Paul)	Tracy Kulhman* (Tallyho)

List of Facilitators

Stephane Barnes-Simms (Jackson Center)

George Barrett (Jackson Center)

Tim Stallmann (Jackson Center)

Hudson Vaughan (Jackson Center)

RENA leaders already mentioned also helped facilitate*

List of Additional Panelists/Guests:

Mayme Webb-Bledsoe, Duke Durham Partnership

Ebonie Alexander, Black Family Landtrust

Melanie Allen, NC Conservation Trust

Appendix B. Glossary of Terms

Affordable Homes

There is a difference between affordable housing and affordable homes, and “homes” is used purposefully here. Affordable homes necessitate a certain quality, wholeness, and connection with the community around them. Rogers Road has been home to generations of residents (indeed, over 80% of residents have historic ties to the community). Whatever new housing is built in the neighborhood must be suited for families (3 bedroom, 2 bath as the primary model, with a smaller model for elder housing) and also be integrated into the fabric of the existing community, ideally attracting and retaining subsequent generations of historic Rogers Road residents. Also, the standards for affordability used in new development should further the existing socio-economic diversity in the neighborhood (including a significant percentage of households earning below 50% AMI) – which will necessitate more careful and creative approaches than the standard 60-80% AMI metric.

Community Commercial

While there are a range of opinions about the presence of retail and commercial generally in the neighborhood, there was strong support for the existence of modest, community commercial spaces that allow for small, local businesses to serve the community. Examples given have included hair salons and barbershops, small ethnic restaurants, hardware store outposts & maker spaces, community health clinics, small outdoor markets, and kiosk-size spaces for short-term use (such as flower shops) to support entrepreneurship. We use the phrasing “community commercial” here to highlight that the goal is to serve the neighborhood, provide employment opportunities, and ensure that affordable commercial space is available long in the future. Meeting those goals will likely necessitate a different model from traditional commercial retail, either involving a nonprofit developer, subsidies, or both.

Connectivity

Connection, in the planning world, is often limited to physical infrastructure. A new subdivision is sometimes considered “connected” if it ties into the main road and has access to Weaver Dairy, for example. The term here means more integration of spaces: connection that is physical, social, and cultural. Connectivity prioritizes historic Rogers Road residents and requires integration of new development into the existing fabric of the community.

Conservation

The undeveloped land in Rogers Road is not vacant; to the contrary it has a wealth of value for residents of Rogers Road and surrounding communities. For generations this land has played an important role as a site for recreation, for fruit orchards, and for contemplation. Conservation on the tract should acknowledge and build on this cultural value without disturbing the rural feel of the area – not creating a sectioned-off or walled-off part of the community, but keeping large portions of these lands open for enjoyment and connection to the natural world, while protecting this special environment.

Honors history

Honoring history in tangible ways refers to more than just physical markers, signage, and history exhibits, although these are important. It also means that any development must show alignment with community goals and be something historic Rogers Road residents take pride in.

Preserves diversity

To continue to promote and ensure the existing diversity into the future; to further the remarkable socioeconomic and cultural diversity that is already present in Rogers Road.

Appendix C: Timeline

Timeline of Community Planning Work	
<p>Pre-process interviews and review: In the first month, RENA and the Jackson Center worked together to review past plans, including the Small Area Plan & the various Task Force reports. We devised questions for the planning departments and key stakeholders and completed several small group interviews, to better understand what the gaps were in previous efforts and what common priorities and themes had been identified as starting points for community discussion. We identified leaders from the sub-neighborhoods and other major stakeholders to invite to the Unity Board, and sent out invitations. Unity Board members include neighbors from sub-neighborhoods including Historic Rogers Road, Billabong, TallyHo, Meadow Run, Phoenix Place, Rusch Rd, and Sandberg areas, and leaders from St. Paul, Church of the Advocate, and Faith Tabernacle.</p>	<p>August 15- September 30</p>
<p>Unity Board Meeting 1: The group reviewed the proposed process and charge. We shared visions for the future of Rogers Road 10 years from now and began discussing priorities identified from past planning efforts and what had changed since that time. We had dialogue about the struggle of past processes to move toward implementation and began discussing sets of questions to help this effort move forward comprehensively.</p>	<p>October 8</p>
<p>Unity Board Meeting 2: The group developed a draft of priorities for future development based on the themes from the shared visions and from the previous plans. Three small groups participated in a rotation activity into categories of past priorities, updating them, challenging them, and mapping vision into strategy.</p>	<p>October 22</p>
<p>Unity Board Meeting 3: The group began to geographically map answers to questions set forth from the priorities for future development that began to elaborate on the “what” and “where.”</p>	<p>November 7</p>
<p>Unity Board Meeting 4: The group critiqued the existing work to date, finalized the priorities for any future development, and worked on mapping questions related to the priorities.</p>	<p>November 22</p>

Unity Board Meeting 5: We identified the major parcels of undeveloped land or large tracts with the most likelihood of future development. The group explored hopes and fears specifically for those identified parcels and how it connected with the overall visions for the neighborhood.	January 16
Interviews Round 1: We developed a set of questions for individuals to respond particularly with their hopes and fears related to large undeveloped tracts of land and conducted interviews with participants of the Unity Board.	Jan. 16- Feb. 11
Unity Board Meeting 6: We reviewed all work to date and focused on the points in which there were the most differences in the interviews. We created an outreach plan and an approach to begin moving toward a final strategy document.	February 11
Interviews Round 2: We interviewed additional neighbors from sub-neighborhoods with the questions focused on major areas of undeveloped land and the design feel document, to make sure these conversations were taking place more broadly.	Feb. 11-March 15
Community Panel Discussion: Tools & Strategies. Four organizations - Black Family Land Trust, NC Conservation Trust, The Duke-Durham Partnership, and RENA discussed models and tools historically African American communities have used to influence land use and development; what experiences from across the state might assist Rogers Road in the preservation of its diversity; and what strategies might be used to pursue the priorities laid out by community members. Over 30 neighbors attended.	March 15
Unity Board Meeting 7: We met to review the final draft of the document. Residents gave feedback page by page. At the end of the meeting, residents in attendance decided unanimously to move forward with the document pending suggested changes.	April 26
Unity Board Review: The final draft was distributed to all primary participants for one last round of edits. RENA and the Jackson Center incorporated suggestions and finalized the document.	April 26-May 20

Appendix D. Meeting Flyer Example



Preserving the Future of Rogers Rd Panel Discussion

- ✓ What models and tools have historically African American communities used to influence land use and development in their communities?
- ✓ What experiences from across the state might assist Rogers Road in the preservation of our diverse neighborhood?
- ✓ What strategies might we use to limit suburban sprawl happening around us?

Come join this discussion in which leaders from across the state of North Carolina will share their experience and engage in a dialogue with neighbors as we work to preserve the future of Rogers Road.

Panelists:

- ❖ Ebonie Alexander, Executive Director: **Black Family Land Trust**
- ❖ Mayme Webb-Bledsoe, Neighborhood Coordinator: **Duke-Durham Partnership**
- ❖ Melanie Allen, Diversity Program Director: **Conservation Trust for North Carolina**
- ❖ Minister Robert Campbell, **NAACP President & Rogers Road Community Leader**

March 15th at 6 pm, RENA Community Center

Refreshments will be served.

RENA Community Center: 101 Edgar Street, Chapel Hill, NC 27516

919-918-2822

References

Final Report. Rogers Road Small Area Plan Task Force, 2008.

Historic and Vibrant Rogers Road. Rogers-Eubanks Neighborhood Association and Marian Cheek Jackson Center, 2012.

Rogers Road. Emily Eidenier Pearce in collaboration with Rogers-Eubanks Neighborhood Association, 2008.