

# COMMUNITY ENGAGEMENT IN THE DEVELOPMENT PROCESS

## TECHNICAL ASSISTANCE PANEL (TAP) REPORT



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# INTRODUCTION

## About ULI - The Urban Land Institute

The Urban Land Institute is an international, cross-disciplinary nonprofit research and education organization. More than 45,000 real estate and urban development professionals make up its member base, which spans the globe. ULI's members are dedicated to advancing the institute's mission of ***shaping the future of the built environment through responsible land use capable of transforming communities worldwide for the better.***

ULI's members represent all aspects of the industry, spanning all related disciplines. They include developers, property owners, investors, architects, urban planners, public officials, real estate brokers, appraisers, attorneys, engineers, financiers, and academics. The institute was established in 1936 and has since grown to have a presence in 80 countries.

## About ULI Charlotte

ULI Charlotte is one of 52 District Councils of the Urban Land Institute in the Americas. The District Council offers ULI services and benefits at a regional level. The mission of ULI Charlotte is to bring the resources and expertise of ULI to the local and regional level through education, research, and the exchange of ideas and experiences.

## About ULI TAPs

The ULI Charlotte Technical Assistance Panel (TAP) program seeks to provide targeted, expert advice from industry leaders on a variety of topics, linking the expansive, inter-disciplinary knowledge of ULI members to clients with complex land development challenges. By bringing together professionals with different disciplines and backgrounds, TAP panels can infuse creativity, energy, and a fresh perspective into complex topics. The TAP program is an extension of the national ULI Advisory Services program. ULI's Advisory Services panels provide strategic advice to public agencies, nonprofit organizations, or nonprofit developers on complex land use and real estate development issues. The program links clients to the knowledge and experience of ULI and its membership.

Since 1947, ULI has harnessed the technical expertise of its members to help communities solve difficult land use, policy, and development challenges. TAPs begin with a detailed briefing package from the client, including preliminary documents and information from experts. This is followed by an intensive, full day working session, typically in the client's community.

Clients use TAP panels to answering questions about a specific development issue or policy barrier in a defined geographic area. The panel spends a day and a half perusing briefings, engaging in listening sessions, and performing interviews to come up with its recommendation. A written report highlights the panel's responses and offers a diverse set of ideas and suggestions.

# ASSIGNMENT OVERVIEW

## Client

This TAP was engaged by the City of Charlotte Planning Department and sponsored by a grant from the Knight Foundation.

## TAP Panel

Members of ULI were selected to provide a wide variety of experiences. Full biographical sketches of each panelist are included in Appendix B of this report. Panelists for this engagement were:

### Panel Chair

**Rachel Russell Krenz**

Director, Ram Realty

### Panelists

**Sherry Okun-Rudnak**

Partner, BAE Urban Economics

**Mack Paul**

Partner, Morningstar Law Group

**Yolanda Taylor**

Attorney, Yolanda L. Taylor Law Firm

### Program Support/Management

**Theresa Salmen**

Executive Director, ULI Charlotte

**Lee Stevens**

Contract Writer, LandDesign

## Scope

The City of Charlotte recruited ULI Charlotte to address community engagement. As the city looks toward the next 20 years with the Future Charlotte Comprehensive Plan, many residents have expressed trepidation about changed development standards

that could significantly alter the existing engagement process. The selected TAP panel convened June 2-3, 2021, to provide objective and responsible advice on the following questions:

1. How can the community be involved in development projects?
  - Need to establish clear goals and outcomes about what community engagement is intended to produce, such as affordable housing, public infrastructure and facilities, a thriving local economy, and a well-planned and equitable community.
  - Must explore whether thresholds are needed for different levels of involvement.
2. What community benefits can come from development projects?
3. What tools can help communities organize and effectively participate?
4. What are the city's roles and responsibilities in participating and facilitating community involvement?

**Scope Disclaimer:** While the intent of the TAP was to identify how the community can engage in the development process, it was difficult to stay on topic and directly answer the scope questions. The timing of the discussion was during a heated time, just before the vote on the 2040 Comprehensive Plan. Many stakeholders were frustrated about the draft Comp Plan process and that amplified the level of sensitivity and polarization during discussions with stakeholders. This impacted the focus of the panel, requiring panelists to redirect conversations to the specific scope ULI was engaged on, rather than the more general plan. Additionally, the panel found the defined scope to be too large to address in the brief time of the TAP,

but necessary to begin “peeling back the onion” on the community engagement.

## TAP Process

The panel received a briefing from the City of Charlotte on the afternoon of June 5 to frame the goals of the TAP and gain the necessary context. City staff informed the panel about the process of developing the Charlotte Future 2040 Comprehensive Plan comprehensive plan, the vision for growth and a deeper commitment to engagement, and the dynamics of the current engagement process.

Stakeholder interviews were conducted via Zoom the following morning. Panelists met with city council members, community and neighborhood leaders, and Charlotte developers to learn about the strengths

and needs of public engagement practices, as well as necessary considerations for shaping a new process. Additional written comment submissions were received from stakeholders unable to attend the interview sessions. The panel then entered its afternoon work session and, after discussion and brainstorming, presented preliminary findings virtually over a publicly accessible Zoom at the end of the day June 3. A memo of the findings was provided June 6 as part of the city council meeting materials in advance of the Comp Plan discussion (see Appendix A).

This TAP report was prepared under the guidance of ULI Charlotte and offers a summary of the comments heard from stakeholders, along with key findings and panel recommendations.

## CONTEXT AND DEFINITIONS/REFERENCES

### Community Engagement and its Significance

Community Engagement means to work collaboratively with people who live near each other or have similar interests or affiliations to address issues affecting the well-being of those people. It is a powerful vehicle for bringing about environmental and behavioral changes that will improve the health of the community and its members. It often involves partnerships and coalitions that help mobilize resources and influence systems, change relationships among partners, and serve as catalysts for changing policies, programs, and practices (CDC, 1997).

Involving the public in development decisions and keeping them up to speed on upcoming projects creates a culture of civic engagement. An engaged public generates economic resiliency by being more invested in the growth and development of the city. Development projects can be more successful with

input from communities and from the support of the neighborhoods buoying them. Robust communication between city officials, developers, and community members can help identify community needs and how best to achieve them. Meaningful community engagement would include the voices of those are often left out while focusing on a shared vision for a prosperous future. Community benefits proffered by developers during the community engagement process can create more vibrant neighborhoods and help meet the needs of citizens, but benefits can be equitable only if everyone is invited to the table where the agreements are drafted.

### Charlotte Future 2040 Comprehensive Plan

The Comprehensive Plan (also referred to as the 2040 Plan or the Comp Plan) is a long-range planning document that will guide development toward a set vision for Charlotte’s future. The plan will determine

the direction of growth and where investment should be directed over the next 20 years. The planning document contains policy guidance and regulatory updates that will influence how Charlotte’s Unified Development Ordinance is shaped, ultimately having a large impact on Charlotte’s built environment. Future small area plans and studies will be guided by the overarching vision of the Comprehensive Plan and its policies. Community engagement is vital because the plan makes wide-reaching policy decisions based on the dynamics of the full urban context and will help guide and implement change at a smaller level. As this is the first comprehensive planning effort since 1975, it poses significant challenges and incredible opportunities to route Charlotte toward a more equitable future.

Charlotte is the 15th largest city and the fifth fastest growing metropolitan area in the United States. Its population is more than 900,000, and most of its residents belong to a minority group. Job growth is occurring four times faster than the housing supply. As in many American cities, inequity in wealth is geographically stratified throughout the city.

## Unified Development Ordinance

Regulations from eight Charlotte development ordinances are being consolidated, simplified, and updated into a single overarching document. Common language and graphics, along with a streamlined location, will make development standards easier to find and understand for all involved. Revised development standards may reduce the number of projects that need to go through the conditional rezoning process by allowing more built conditions to occur by-right of the development code without any requirement to petition for special approval.

## Rezoning Process

When a development project cannot meet the standards of the underlying zoning district, a developer may seek rezoning. A conventional rezoning basically goes by what is permitted in the ordinance. A conditional rezoning is tied to a specific use or proposal that differs from what is permitted by-right in general or overlay zoning districts. About 20% of the rezonings in Charlotte are conventional, and 80% are conditional. Conditional rezonings offer the most formalized option for community members to engage in the development process. Community engagement requirements include a rezoning notification sign on the property, notification to property owners within 300 feet, listing under the city’s rezoning webpage, a developer-hosted community meeting, and a public council hearing. See Appendix C rezonings from 2016 to 2021.

## Projects with Public Funds

When public funding is associated with a project, community engagement is even more vital to help inform how the project develops. Tools such as Tax Increment Financing (TIF) or, more frequently used in Charlotte, Tax Increment Grants (TIG) are important to understand for the role they play in producing development while ensuring a high standard of community benefit to justify the use of public funding. The city uses TIGs as a public-private partnership tool to advance economic growth and land use planning goals. A TIG does not require the establishment of a district, which generally is required by traditional Tax Increment Financing (TIF) tools.

TIGs are provided on a reimbursement basis only, and the project must demonstrate its benefit to the public. Reimbursable improvements through a TIG include new public infrastructure such as roads, streetscapes, and parking decks. A TIG may also be employed to assist in gap funding for developments shown to achieve the city’s goals and objectives (such as affordable and workforce housing or job

creation) but would not be financially feasible without assistance from the city.

## Community Benefits Agreements

Community Benefit Agreements (CBA) are contracts signed by a community group and a real estate developer requiring the developer to provide specific amenities and/or mitigations to the community or neighborhood related to a specific site. CBAs are project specific and can vary based on the size and budget of the development, the needs of the community, and the level of engagement that occurs while drafting the agreement. In North Carolina, CBAs are not enforceable by local municipalities to mandate or enforce; however, they may be enforceable through local courts.

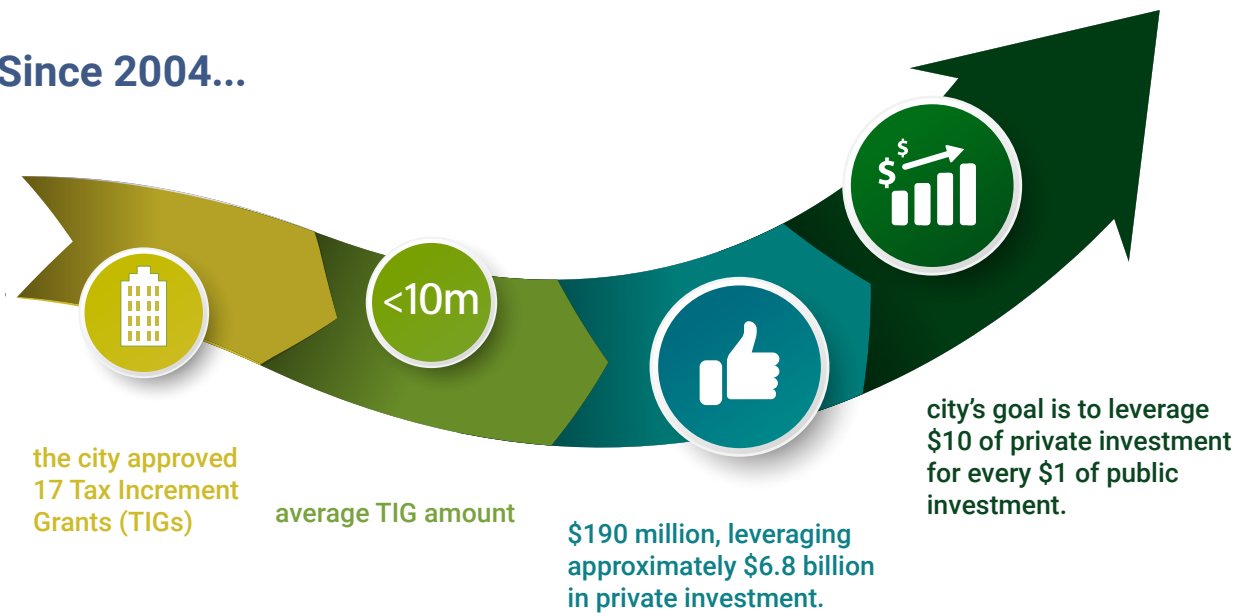
## Development Agreements

A Development Agreement is a voluntary contract between a local jurisdiction and a real estate developer, detailing the obligations of both parties and specifying the standards and conditions that will govern development of the property. These agreements are often used when public funds are used for a project.

## Large Scale Development

The definition of a large-scale development has not been solidified; however, any development that exceeds 10 housing units, has more than 50,000 square feet of commercial space or is larger than 1 acre could be considered a large-scale development. The city should look to other municipalities for comparative definitions. For example, the City of Raleigh requests a second neighborhood meeting for any rezoning of five acres or more or five stories or more.

### Since 2004...



- Since 2004, TIGs leveraged \$28 of private investment for every \$1 of public investment.
- Since 2015, TIGs leveraged \$119 of private investment for every \$1 of public investment.

## SUMMARY OF STAKEHOLDER INPUT

Through virtual stakeholder interviews and written comments, the panel collected community input from a variety of stakeholders. Participants were:

**Collin Brown** | Alexander Ricks

**Theresa McDonald** | Allen Hills/Derita

**Jon Morris** | Beacon Partners

**George Maloomian** | Cambridge Properties

**Megan Liddle Gude** | Charlotte Center City Partners

**Mike Sullivan** | Charlotte E.A.S.T.

**John Porter** | Charter Partners

**Tom Coyle** | Childress Klein Properties

**Malcolm Graham** | City Council District 2

Representative

**Tariq Bokhari** | City Council District 6

Representative

**Bobby Drakefor** | Community Benefits Coalition

**Brendan Pierce** | Crescent Communities

**Tim Sittema** | Crosland SE

**Ellen Citarella** | Dilworth (DCA)

**Patricia Battle** | FENCO

**Liz Ward** | Give Impact

**Marjorie Parker** | Hidden Valley

**Mattie Marshall** | Historic West End Neighborhood Association

**Jimmy Vasiliou** | Housing Justice Coalition

**Nate Doolittle** | Land Design

**Julie Eiselt** | Mayor Pro-Tem

**Bridget Grant** | Moore and Van Allen

**Melissa Gaston** | North End Community Coalition

**Stuart Proffitt** | Proffitt Dixon

**Amar Johnson** | Seversville Community

Organization

**Hilary Greenberg** | Southpark Association of Neighborhoods (SPAN)

**Abdul Sihlangu** | Steele Creek

**Eric Zaverl** | Sustain Charlotte

**Sylvia Patton** | The Cherry Community Organization

**Chantelle Morales** | Villa Heights

**Rickey Hall** | West Blvd Neighborhood Coalition

**Jordan Brooks-Adams** | West Side Community

Land Trust

The general topics and themes the panel heard during stakeholder interviews are summarized below.

**All stakeholder groups believed community engagement can have a positive impact.** It was clear that the stakeholders believed that community engagement led to better developments and a better city overall. Community members commented on engagement as a tool to disseminate information about upcoming changes to their neighborhoods and as a means for them to have a voice in how their neighborhood develops. Developers believed they would benefit by learning more about the neighborhood and understanding the needs of the community better, and they understood that their projects would be more successful if they were supported by the community. City staff and council members echoed the potential value that could be generated from understanding all stakeholders' interests. Engagement helps the city plan for the future and understand the dynamics of individual neighborhoods.



“More affluent neighborhoods had developed their own processes to create agreements with developers. Other neighborhood leaders stated they were often unaware of developments underway until it was too late to have a voice.”

**All stakeholders mentioned that community benefits have not been equitable.** During interviews with neighborhood leaders, it became evident that more affluent neighborhoods had developed their own processes to create agreements with developers. Other neighborhood leaders stated they were often unaware of developments underway until it was too late to have a voice. An apparent lack of consistent engagement across the city was evident. Multiple references were made by all stakeholder groups regarding investment (both public and private) being concentrated in what was referenced as the “wealthy wedge” of Charlotte.

The rezoning process is the most formalized way for the public to be involved in development projects in Charlotte. As engagement is a requirement for only conditional rezonings, and only landowners within 300 feet are included, some did not believe that enough stakeholders were represented. Many stakeholder interviews also referenced that the rezoning engagement process has inherent shortcomings – the voices invited to the table are limited and may not represent the full neighborhood’s opinions, and the avenues for engagement are too narrow.

**Both neighborhood representatives and developers did not believe their input was being fully gathered and acted upon.** The way community groups learn

about upcoming development was uneven around Charlotte. Some neighborhoods created internal development councils or boards to seek out development information. These neighborhoods seem to have the time, resources, and knowledge to be engaged in the development process. Other neighborhood representatives expressed seeing a lack of transparency from developers and the city, making it difficult to find entry in the process or even to know when new development could be underway. Without dedicated members advocating for a voice in the process, these neighborhoods experience a city developing without them.

Many developers believe that they go above and beyond engagement requirements set by the city but expressed a need for greater support from city staff to make inroads with neighborhoods and gain the tools for successful engagement. Developers felt that Comp Plan engagement and other city-led processes lack sufficient engagement with the development community, resulting in a missed opportunity to leverage the private investment impact on the community.

**There is an information gap on how to best connect with the community.** Each neighborhood is different and has unique needs. Without that intimate knowledge of place that comes from living immersed in an environment, developers expressed that they cannot know the key leaders and what benefits a community may need. During stakeholder interviews, developers voiced frustration that the engagement process lacked support from the city, leaving them to navigate an engagement process without resources, engagement expertise, or neighborhood relationships. The spokespeople for the neighborhood and the true wishes of the entire neighborhood versus those of an individual were unclear to developers.

Many community members feel there is intent to not let people know about proposed development.

“Each neighborhood is different and has unique needs. Without that intimate knowledge of place that comes from living immersed in an environment, developers cannot know what benefits a community may need.”

Some comments: Rezoning notifications are required only for landowners within 300 feet; community meetings can be scheduled at times that aren't convenient; engagement begins when it is too late to make effective changes; little digital information is provided; and access to city representatives and the developer isn't straightforward.

Both community members and developers expressed concern that city staff were out of touch with community needs and development progress, rendering them ineffective due to the standard of developer-driven engagement.

### Community and city staff lacked understanding of the development process.

Both groups referenced benefits that would not be possible for a developer to commit to, such as requests for a specific grocer to occupy the coming development space. Too often, community goals are admirable and worthy but are too ambitious for the scale of development. Both community residents and some staff acknowledged that gentrification in underinvested communities – or the city's “Corridors of Opportunity” – was a concern, intensified by a lack of engagement or information for upcoming projects. Without more thorough knowledge of the development process and what projects are in the pipeline, communities cannot know the tools they have to protect themselves from being priced out and could miss the opportunity to leverage the CBA process.

Developers felt that the community and the city

did not understand how their industry functioned, resulting in unachievable asks. They wished stakeholders better understood economic principles such as supply and demand, the lack of power a developer has over market-driven decisions, and the timing of development for when effective change is possible.

### Everyone uses the word “benefit” in different ways.

When asked to describe what benefits might be plausible to come out of engagement, a wide variety of answers was provided. Benefits can range from a microlevel, such as construction parking to preserve space for residents, to a macro level, such as making sure residents aren't displaced. Benefits could also be as theoretical as giving a seat at the table during community change conversations. Conversations about ways to achieve benefits got muddled when each person was talking about a different type of benefit. Generic statements of “developers need to provide community benefits” were often said, but the specific benefits referenced were often not achievable without public funding of a subsidy, requiring the city or another entity to take action. Conversations were easier to have with all stakeholder groups when specific benefits were outlined, rather than a generalized bucket of benefits.

### “Community engagement” as a term is often used when people are actually talking about community equity.

All groups at some point used the term community engagement when they were referencing equity. There is a need to provide opportunity for all to be heard, with a balance of power between citizens, developers, and the city. There were calls for:

- Leveraging private and public dollars across the city for a specific neighborhood that has overdue infrastructure improvement needs
- Creating criteria for public dollar investment.

- Identifying locations of private investment.
- Much of the community engagement conversation is founded on the concept that all people want to be included and treated equitably.

**The community and the developers both believe that earlier engagement has a positive impact, though the impacts and intents differed.**

The community wants to be engaged earlier in the development process to:

- know what’s happening in their neighborhood,
- shape the development of their neighborhood, and
- stop a development from happening.

Developers who engaged the community earlier said it helped their projects to:

- create local networks of community members,
- understand the history and community needs near the site,
- increase the likelihood that projects or solutions will be widely accepted, and
- create more effective solutions.

Developers also believed their engagement has helped to:

- improve citizens’ knowledge and skills in problem solving and
- empower and integrate people from different backgrounds.

**A lot of mistrust exists in the conversations between community members, developers, city staff, and council members.**

Developers didn’t seem to have faith that the city could set up an engagement process that wouldn’t negatively impact the economic development of the city. Council members felt like not all city staff had the community’s best interest in mind.

Neighborhood leaders didn’t trust that they would be treated equally.

Mistrust has, in part, been a product of poor dissemination of information. Many community members do not feel informed about upcoming changes or developments until projects are too far along for engagement. The lack of a formalized process and minimal requirements for engagement makes citizens wary of what they can expect. Conversations about a change in process without specific guidelines cause developers to be suspicious. And lack of education about the development process, which party is responsible for specific community benefits (e.g. developer, city, state, etc.) and what is appropriate for community members to ask of developers erodes the trust in the system or its outcomes. Neighborhoods desire a binding assurance so commitments by developers will be upheld.

**City staff did not have a consensus on the intent of the Comprehensive Plan’s community engagement language.**

City staff were not in agreement about whether the number of rezoning requests would be reduced by the Comprehensive Plan and, as such, had differing ideas on the needs of engagement. The language in the document regarding engagement tools and applicability of types of projects wasn’t consistent with language shared verbally from staff.

**The city’s Housing & Neighborhood Services is a valuable department with the opportunity to house several tools that could help facilitate more meaningful and equitable engagement.**

Both neighborhood leaders and council members referenced an opportunity for the Housing & Neighborhoods Department. It already has existing relationships within Charlotte’s neighborhoods and with community leaders. Developers don’t interact with the department but could benefit from the structure

already in place. Using these relationships as a starting point to introduce tools to neighborhoods could make the department a known resource for residents.

**All stakeholders have a strong desire to continue the conversation right now and into the future.** All parties want to continue the conversation about general com-

munity engagement, as well as specific projects. Community members want more opportunities to advocate for community-wide and project-specific benefits. Some council members said they were hopeful that the conversation on how to better engage the community was leading to a better city and should continue. Staff members were energized by the conversation and said they hoped the conversation and positive energy would continue.

## PANEL RECOMMENDATIONS

Community engagement is an integral component for effective public planning and growth of the city. Effective engagement allows community members to voice their views and contribute. In addition to being responsive to community input and transparent in decision-making, well-designed engagement processes are accessible and meaningful to community members with diverse backgrounds.

The panel concluded that “development projects” in the scope are any planned action that results in change for an area, including public and private physical projects and public policy that sets the framework for all projects. Charlotte needs more meaningful engagement in all these actions. Meaningful engagement requires that the quality of outreach be raised, and the opportunities increased for the entire community. Below are a series of recommendations to increase the amount and improve the quality of meaningful engagement.

“Meaningful engagement requires that the quality of outreach be raised, and the opportunities increased for the entire community.”

### Community Engagement Roles

Consensus on roles and responsibilities of all stakeholders is important for fostering trust and creating structure to set engagement up for the most success. The city should reinforce each stakeholder role and serve as a network facilitator to connect the right people for full engagement. Below is a brief outline of recommended roles:

#### Community and Neighborhood Leadership Role

- Identify a diverse group of stakeholders to represent the community and specific neighborhoods (ongoing process)
- Identify community representatives who have the voice and authority of the neighborhood regarding benefits
- Find consensus before developments come forward
- Take advantage of City Neighborhood Planning Academy, UrbanPlan (a ULI program), and other education resources available to more effectively learn about land use processes and advocate for interests

**Developer Leadership Role**

- Alert the community to new projects
- Reach out and listen to the community
- Be good neighbors as stewards of the community and environment
- Follow through on agreements
- Educate how their process works
- Make engagement opportunities accessible with multiple options of how to engage

**City Council Leadership Role**

- Mediation of conversations
- Act as the voice of citizens
- Hold staff accountable to engagement tone
- Connect community to resources

**City Staff Leadership Role**

- Maintain lists of community and neighborhood representatives
- Alert the community to upcoming development
- Assist community with education resources
- Conduct early engagement to help community

- identify interests and potential tools
- Educate development community on community interests
- Facilitate interactions and be present in conversations
- Ensure that developers and residents are meeting to discuss the proposed project or development
- Share data and information with developers on neighborhood needs and assets gained through stakeholder meetings and conditions analysis
- Monitor agreements

**Identify & Categorize Potential Community Benefits**

Benefits are highly specific to each neighborhood, the context, and the resources of the entity tendering the community benefit. The examples of community benefits outlined in Exhibit 1 are a starting place for potential benefits that a community may be interested in achieving.

**Exhibit 1: Community benefit examples**

**What benefits are we all talking about?**

Whether through \$\$ contribution, time contribution, plan agreement, or actual construction

- |                                    |                                     |                                                 |                                                                                               |
|------------------------------------|-------------------------------------|-------------------------------------------------|-----------------------------------------------------------------------------------------------|
| ▪ Affordable housing               | ▪ Lighting restrictions             | ▪ Ample parking                                 | ▪ More jobs                                                                                   |
| ▪ More homeownership               | ▪ Lighting enhancements             | ▪ Parking visibility                            | ▪ Higher wages                                                                                |
| ▪ Sidewalks                        | ▪ Use restrictions                  | ▪ Parking access                                | ▪ Cash                                                                                        |
| ▪ Greenways                        | ▪ Required uses                     | ▪ Community meeting space                       | ▪ Signage                                                                                     |
| ▪ Art                              | ▪ Specific tenant requests          | ▪ Event space                                   | ▪ Stormwater run off management                                                               |
| ▪ Stop lights                      | ▪ Building height                   | ▪ Bike share                                    | ▪ Enhancements to infrastructure (stamped concrete sidewalk)                                  |
| ▪ Grocery stores                   | ▪ Building articulation             | ▪ Security (ie. Cameras)                        | ▪ Fencing                                                                                     |
| ▪ Daycares                         | ▪ Crosswalks                        | ▪ Density                                       | ▪ Trees/landscaping                                                                           |
| ▪ Public transportation            | ▪ Construction hours limitations    | ▪ Diversity of housing                          | ▪ Additional buffers                                                                          |
| ▪ Prevent displacement             | ▪ Construction parking requirements | ▪ Seat at the table for important conversations | ▪ Tax freeze                                                                                  |
| ▪ Turn lanes                       | ▪ Restaurants                       | ▪ Parks                                         | ▪ Something someone not invited to the table wants to see but hasn't had a chance to voice... |
| ▪ Benches                          | ▪ Entertainment                     | ▪ Preservation of buildings                     |                                                                                               |
| ▪ Specific group capacity building | ▪ Right of way dedication           | ▪ Preservation of trees                         |                                                                                               |
| ▪ Healthcare access                |                                     | ▪ Preservation of open space                    |                                                                                               |

spaces or corridors to improve multimodal options, such as expanded sidewalks with bicycle and scooter docking stations. If using a district-based parking program, profits generated from parking revenues can be invested in TDM programs. This might include traditional behavior-change programs and modest capital expenditures on striping for bike lanes, enhanced crosswalk design, and sidewalk completion/expansion/enhancement. Through the development approval process, TDM can be positioned as one way to reduce the neighborhood impacts of new development.

It is critically important for the city to distinguish between engagement conducted to accomplish broader community objectives (affordable housing, equity, economic development, etc.) and engagement conducted to accomplish better outcomes for a specific site. The former is much more impactful to achieving the high-level purposes of engagement stated above (e.g., social capital/equity, vibrant, efficient city, harmony). The benefit examples listed above vary in scale, stakeholder involvement, and impact, creating a challenge to provide one tool to achieve all.

For example, requiring a developer to create an agreement solving a large topic, such as mitigating displacement of neighbors whose taxes go up, is not achievable just before permits are submitted. But a construction impact mitigation

may be achievable at that stage. And a city-wide displacement strategy might be achievable if engagement happens at a larger scale, involves parties who control the taxes, and has time to enact the necessary changes.

“To truly achieve maximum benefits, the city should create three scales of benefit types: site-specific, neighborhood-wide, and city-wide.”

Within each type, the tools, roles, and timing of each will vary depending on the scale. The following questions will help to identify which category is best suited for the benefit and, therefore, who should be in a leadership position to bring it to fruition:

1. Who does this benefit?
2. Who will it impact (both positively and negatively)?
3. Whose approval is required to make the benefit a reality?
4. Who enforces it?
5. Who maintains it (when necessary)?
6. How long does it take to plan and agree on?
7. How long does it take to implement?
8. How is it funded and who is responsible?



## Organize types of benefits



The following recommendations herein tie to each scale so the next steps can set realistic expectations of which benefits can be achieved by who and how.

### Tools for Site-Specific Benefits

Site-specific benefits are those that can be addressed by a property owner/developer and will need sufficient time to include the benefit before full design, permitting, and financing of the project. These are smaller in scale than global issues, but have major impacts on adjacent neighbors.

- Most benefits on a specific site are governed by existing policies. For example, there is code stating that trash must be screened to prevent visibility from public streets. Other benefits that communities desire could be addressed through policy in the same way. The city could host a community-engagement workshop to further explore whether requested benefits are already addressed in policy or if they should be.

The outreach should specifically address the following:

- What site specific benefits are communities asking for? (See Exhibit 1 for requested benefits identified during the TAP)
- Are those benefits currently addressed in policies?
- If already addressed, add educational resources to community toolkit to help communities understand how their interests are protected in by-right development.
- How can benefits that are not addressed be updated in policies?
- The rezoning and site plan process should continue as it is currently operating with some adjustments. Proposed changes include:
  - Rezoning applications for large-scale developments should have a prerequisite that the developer reach out to community leaders. The pre-app meeting with city staff should result in a clear definition of community leaders to contact prior to

application submittal.

- The city should notify adjacent neighbors of all potential rezonings when the application is submitted, and not just at the required community meeting invitation
- After a large-scale rezoning application is submitted, the city should facilitate a neighborhood meeting to receive feedback regarding concerns about the proposed development, to allow for discussion around public benefits and neighborhood priorities, and to educate the community on any existing policy to address benefits and priorities.
- Any site that plans to use public dollars should be required to have a Development Agreement between the developer and the public entity providing the dollars. That Development Agreement should reference a Community Benefit Agreement between the developer and the community organization. The process to achieve both agreements should be clearly outlined and consistent for all developments. A minimum amount of community engagement opportunities, active involvement from the city, and a required response time from each stakeholder.
- A required community meeting should be introduced for large-scale, by-right developments prior to a land development permit application. While no benefit is a required outcome of the meeting, conversation can lead to potential win-wins.

## Tools for Neighborhood-wide Benefits

Benefits that address the needs of a larger geography and population require engagement in advance of potential change, multiple methods to have the highest amount of engagement, and strong leadership from the city and within the

neighborhood. City staff should emphasize the need for public engagement in creating long-range plans, small area plans, investment strategies, the UDO, and rules of engagement so benefits are clearly identified and baked into the development framework before any project gets underway. Involving citizens in how policies, regulations, and development goals or visions get created will give the public much more control over how Charlotte develops. This is where community engagement can have a bigger impact, rather than limited engagement opportunities contingent on dynamics of a specific site. Once engagement has been completed, an implementation strategy with checkpoints will be important to ensure realization of potential benefits. Small area plans and community investment plans are two main tools that will help identify benefits and address implementation.

- Small area plans should be used to set a guide for future developments, allowing for more nuanced visions, policies, and requirements tailored to the neighbors, as well as more meaningful, long-lasting changes. Using these more geographically specific planning efforts to shape policy can codify community benefits to ensure their implementation and make them more appropriate for each neighborhood. The city and its consultants should lead the area planning. A goal should be set for having a small area plan for all land in the City of Charlotte by an achievable, specified year.
- Creating a system of Community Investment Plans would allow the city to target money, development, and community benefits to the neighborhoods most in need of these investments. Targeted infrastructure areas could be defined and funded through Tax Increment Grant (TIG) structures that have clearly defined parameters. Development projects that take place in these defined areas should be encouraged to contribute toward



these infrastructure improvements through a higher match of tax increment financing to private dollars.

- The Comprehensive Plan and the upcoming UDO with any text amendments will set the framework for all development to come – both by-right and discretionary. Having quality engagement during those processes will be key to achieving benefits across neighborhoods and specific sites.

## Tools for City-wide Benefits

As is the case for neighborhood-wide benefits, city-wide benefits will require earlier engagement, multiple outreach methods, and strong leadership. They are also intertwined with a large system of the city processes and politics. It is crucial that all elected officials and staff department heads working toward the same goals and that the process is transparent across the city. The following are various tools that came out of the TAP process to help address city-wide issues.

- Create a central repository on the city website where community comments can be analyzed and repetitive comments can trigger action by the city.
- Continue supporting city committees to evolve strategies that address city goals such as affordable housing. The community and real estate industry should be included in the engagement. The community can provide perspective on real desires, and the real estate industry can bring market perspectives and realities to potential strategies.
- All city committees and commissions should have an implementation subcommittee to ensure community benefits are implemented and goals of the group are being measured and achieved.
- Create a Displacement Commission to facilitate community member involvement in maintaining equity and hindering negative impacts of gentrification.
- Tax abatements or freezes for residents should be used to reduce displacement occurring with gentrification. As neighborhoods develop, it is important to consider how rising property values threaten tenure for longstanding community members or lower income residents. These citizens deserve a voice at the table when discussing the longevity of their neighborhoods and the trajectory of their own homeownership security. Engagement opportunities and community benefits that protect existing residents will help the city develop more equitably and strengthen trust between stakeholder groups.
- Explore and provide support for land banking concepts for neighborhoods to plan for larger uses that are needed in the neighborhood. The city could leverage city-owned land for certain public benefits by working directly with community land trust or community land bank nonprofits.
- Use public funds to incentivize the market to achieve goals that wouldn't otherwise be realized. For example, provide a tax credit for desired uses, such as a grocery store, to build in a neighborhood that wouldn't meet their area income criteria, or disburse grants to start-up businesses to cover market rent to increase diversity of tenants and bridge commercial affordability gap.
- Required community engagement is triggered only by a rezoning application or as a component of a city-wide policy creation. The former is spearheaded by the developer and the latter by city staff. Community engagement is not a requirement of by-right development and left entirely up to the developer's discretion.

Presently, no mechanism will trigger engagements early in the development planning process. If developers initiate engagement as a precursor to city applications, the neighborhood could get involved while the project is still in a malleable phase of design. As an incentive, the city could streamline or fast-track applications that include letters of engagement or support from community organizations.

## Importance of Education

“Education within community engagement is paramount so that benefits can be better aligned with the engagement process for the greatest chance of success.”

Community involvement should be used as an opportunity for knowledge exchange between both parties to keep the public informed on potential change and for changemakers to learn the needs and opportunities of the community. The basic step of sharing of knowledge will build trust, but it can also improve the quality of projects. All stakeholders will gain from learning more about the make-up, interests, and processes of other stakeholder groups, fostering more understanding, trust, and communication among each other. All stakeholders, including city staff and officials, community groups and developers, have a role to play in this education process.

- City participation in community engagement as educators is essential. City staff can translate policy, know how development gets formally processed, and are the natural facilitator of all stakeholders. The city should foster more opportunities for developers and community leaders to interact and educate each other.
- A resource guide with information about how the city and county function should be made publicly available, along with continuously

available guidance in how to navigate and plug in to the process. Information about how development works in Charlotte should also be made more accessible, which could help both citizens and city staff more adept at engaging with and being part of development in the city.

- Creating a community engagement toolbox needs to be a main priority. The foundation for a toolkit starts with a centralized repository of existing resources and identification of city personnel to lead the effort. The toolkit could include the public process resource guide, definitions of key terms, information on tools to address various types of benefits, list of funding resources, strategic partnership opportunities, template agreements, community leadership 101, and links to other educational opportunities.
- In addition to the engagement toolkit, the city needs to conduct active outreach to community groups and neighborhoods that have, up to this point, been left out of engagement conversations and have not had the same resources to navigate effective community engagement and discussions about neighborhood benefits. Outreach to marginalized or underrepresented neighborhood members must be intentional and could be done through community-based organizations, non-profits, or service agencies. Arming the community to create greater equity in the existing process, can include:
  - Fund grants for capacity building.
  - Provide venues, childcare, and food for meetings.
  - Notify all citizens (landowners and renters alike) to engage a more diverse pool of participating community members.
  - Provide legal services to aid in negotiations

- with developers.
- Offer skills training
- Plan networking opportunities with key players
- Use the Housing & Neighborhoods Department to identify a diverse group of community leaders and maintain the community contact list. This information would be greatly beneficial to city staff, developers, and neighborhood residents looking to get connected with organizations that could advocate for their needs.
- The city should educate all on the previously mentioned scaled benefits processes to help create appropriate requests and effective engagement. Asking for the appropriate level of engagement and benefits is important so community members aren't asked to be

engineering experts and know what the scope of negotiations can be. Otherwise, the public feels betrayed when requests do not come to fruition, developers feel their time has been wasted, and the city has a less equitable outcome.

- Pair developer and community leaders to brainstorm ways to engage better.
- Benefits that may be contributed by the developer, but not always visible in the project, should be recognized when identifying benefit potentials. For example, the net increase in city tax revenues after accounting for the cost to provide municipal services to the project should be recognized as part of the developer's contribution to community benefits. Exhibit 2 compares a project's increased tax revenue to the city prior to development to 2020:

**Exhibit 2: Examples of tax revenue increase to the city after development**

Property name	Address	Property type	Baseline year	Tax revenue prior to development	2020 tax revenue to the city	Annual tax revenue increase to city
Centro Railyard	1422 S. Tryon Street	Mixed Use	2015	\$7,152	\$388,942	\$381,790
Alta Warp + Weft	2120 N. Brevard Street	Multi Family	2017	\$644	\$194,928	\$194,284
Amazon	8000 Tuckaseegee Road	Distribution	2019	\$22,441	\$183,937	\$161,496
Dimension Place	1515 S. Tryon Street	Office	2016	\$1,580	\$349,373	\$347,793

\* Based on Property Tax Bill Detail at <https://www.mecknc.gov/>. Note: the above shows ONLY the city tax revenue increase and does not include the revenue increase to the county.

- The Planning Academy could be expanded to add a developer who can educate residents on the development process, cost and financing, as well as more complex items such as subsidizing and managing affordable housing.
- Partner with organizations to better understand citizen needs. For example, continuation of this ULI TAP process could be a tool to facilitate more stakeholder interviews and continue to gain insight into challenges to equity in engagement.

- Every city department should have a community engagement policy that serves as an educational tool for staff and a baseline for required engagement. Integrating stronger engagement tactics and dedicated resources across all city departments will be a significant step toward increasing equity of engagement. If all city staff have access to engagement tools and a standard set of engagement expectations, more projects, studies, and plans would incorporate public input, and community members would be more aware of upcoming projects and changes.

## Technology

The COVID-19 pandemic has created a wave of technological advancements to ease the pivot to virtual environments, accommodating health and safety while still providing venues for community. These advancements likely will integrate into future operations. The city should leverage technology to improve the success of communication, reach, and equity in engagement. However, stakeholders involved in engagement may not represent all voices of the community. Individuals who lack connections to technology or who are experiencing houselessness may not be able to participate in engagement opportunities, even if measures are taken to make meetings more accessible (i.e. using technology and recordings, providing childcare and food provisions, and offering multiple meeting times).

Community engagement is an integral component for effective public planning and growth. Effective engagement allows community members to voice their views and contribute. Well-designed engagement processes are accessible and meaningful to community members with diverse backgrounds and knowledge on the issues at hand and are responsive to community input and transparent in decision-making.

- Create a centralized online tool for tracking

and finding all physical change across the city – including public infrastructure projects and public/private developments.

- Create an online development process resource guide to clarify the process for developers and community groups. An example of a similar guide is the City of Asheville’s SimpliCity. (<https://simplicity.ashevilenc.gov/development/major>).
- Offer a virtual meeting option for project- and policy-specific community meetings. Allowing citizens to attend meetings from home (in real time) or to view a recording and leave comments or questions on their own schedule has increased the reach of engagement. More people have been able to participate in meetings that have been typically restricted by work hours, a need for childcare, or an inconvenient location. This evolution in engagement has made the process more equitable and must remain as an option post-pandemic.
- Facilitate virtual rooms at set times for developers, community members, city council, and city staff to join in to improve communication between stakeholders of different groups. Every session should have a notetaker present or a recording in place to make the information available to those not in attendance.
- Record community meetings so community members who cannot attend can watch or review at a later date.
- Evolve rezoning signage to provide more information and link viewers to online resources. Providing QR codes that can be scanned for more information is a quick and easily implemented improvement to the existing process.
- Utilize social media, including Nextdoor, for community outreach and conversation.

- Include opportunities for both in person verbal and remote digital feedback. The Comprehensive Plan comment tool was effective and could be replicated for other engagement opportunities. Creating an online portal for citizens to comment on various projects will increase the amount of engagement.

## Implementation and Monitoring

More community benefits are sure to be achieved after clarifying roles and creating policies, plans, commissions, technology, and educational tools as described above. But perpetual attention to the topic is necessary to achieve and continue success.

- Consider creating an oversight citizen-led commission that monitors, tracks and enforces the policies of the UDO around growth and equitable development. Group would work with the city and developers to continually improve the engagement across the city. Consider term limits to prevent any individual's views from dictating the community's interests.
- The city should schedule an annual check-in with each community group to hear what has or has not been working.

subcommittee.

## Engagement Public Relations Strategy

As the Comprehensive Plan and Unified Development Ordinance are poised to make significant changes to Charlotte's vision for the future and how developments are regulated, a lot of fear is coming from community groups and developers about how the engagement will continue. There is fear that the natural place to plug into the discussion will be gone, as it is unclear how rezonings will be impacted by policy changes and an updated UDO. The city needs to create a targeted strategy to ease some of the fears, build trust, and create excitement about the opportunities of how the city's growth can benefit all. A campaign to create positive energy around the topic will set a tone for success. The city should lead by outlining a path toward improved engagement, using careful language that all can understand, setting an example by creating an engagement policy for every department, and celebrating and sharing successful engagement. Community engagement is not a single tool but, rather, a process that may take place at various levels and employ different approaches at multiple points.

## CLOSING SUMMARY

The following summary answers are provided to respond directly to the scope of the TAP; however, this topic is too important and complex to reduce to a one-page summary. Recommendations in this report are much needed first steps to establishing more equitable and effective engagement. The passion all around this topic and the potential opportunities for

a better Charlotte warrant continued conversation between all stakeholders and leadership work by the city. The panel recommends this TAP was an initial conversation and should continue to evolve with the presently engaged and expanded lists of stakeholders, including more elected officials, city staff members, neighborhood leaders and developers.

## How can the community be involved in development projects?

The community possesses a key to how a site-specific project can be accepted, and it holds the wants and needs that the city projects are trying to leverage. The community can get more involved by capacity building within, attending voluntary and city-required engagement, utilizing a toolkit supplied by the city or a community benefits group, learning more about policies and development processes and, mostly, by having more communication earlier on with all stakeholders impacting their neighborhood.

Community engagement should be a requirement for policy creation, rezoning approval, large-scale by-right land development permit applications, and private development that uses public funds, vision and area plans.

## What community benefits can come from development projects?

While a sample list of potential benefits is provided above, it should be known that the benefit opportunities are endless. Community benefits are whatever the community needs at that time. Creating a system to facilitate that conversation, identify the benefit, and establish a tool and process to achieve it is key. However, it is important to align expectations for community benefits with appropriate entry points into the planning and development process.

## What tools can help communities organize and effectively participate?

A variety of venues for conversations, online databases, educational resources, funding, leadership from the city, required developer and

city outreach, Community Benefit Agreements, Development Agreements, guidance from the Housing and Neighborhoods Department, social media or apps developed to disseminate information on processes and upcoming projects, and the Unified Development Ordinance.

## What are the city's role/responsibilities in participating in and/or facilitating community involvement?

The city has the most important role in guiding the growth of the city. It must be involved in community engagement. It can set an example of how engagement should occur, facilitate conversations, provide resources, educate, and monitor.

# APPENDICES

## Appendix A: Panel Memo – June 6, 2021



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### TECHNICAL ASSISTANCE PANEL MEMO: Community Engagement in the Development Process June 6, 2021

ULI Charlotte, a District Council of the Urban Land Institute conducted a Technical Assistance Panel (“TAP”) on Community Engagement in the Development Process on June 2-3, 2021, to provide objective and responsible advice on the following questions:

1. How can the community be involved in development projects?
  - a. Need to establish clear goals and outcomes of what community engagement is intended to produce, such as affordable housing, public infrastructure and facilities, a thriving local economy, and a well-planned and equitable community.
  - b. Explore whether thresholds are needed for different levels of involvement.
2. What community benefits can come from development projects?
3. What tools can help communities organize and effectively participate?
4. What is the City’s role/responsibilities in participating and/or facilitating community involvement?

Unfortunately, the scope was too large to fully address in the format of a TAP and the scope would require an expansion to address all parties’ interests. As a result, the TAP recommends that the research and community conversations continue. In the meantime, a TAP report will be made available to the public and the City in late July. Acknowledging that the City Council is holding a meeting on June 7, the following key findings have been shared as a representation until the full report is available.

#### **GENERAL TOPICS HEARD AFTER LISTENING TO 45 INDIVIDUALS REPRESENTING NEIGHBORHOODS, ELECTED OFFICIALS, CITY STAFF AND DEVELOPERS**

1. All stakeholder groups believed community engagement can have a positive impact.
2. All stakeholders mentioned community benefits to date have not been equitable.
3. Both Community Representatives and Developers do not feel like their input is being fully gathered and acted upon.
4. Developers lacked understanding of how to best connect with the community.
5. Community and City Staff lacked understanding of the development process.
6. Everyone uses the word “benefit” in different ways.

7. Community engagement term is often used when people are actually talking about community equity
8. There is a lot of mistrust in the conversation.
9. City staff did not have consensus on the intent of the Comp Plan's community engagement language.
10. Housing & Neighborhood Services is a valuable department with opportunity to house some tools.
11. A lot of desire to continue the conversation right now and into the future. This is just the start.

### **INITIAL RECOMMENDATIONS**

1. The conversation needs to be ongoing. Potential ideas to consider:
  - a. Facilitate virtual rooms at set times for developer, community members, city council, and city staff to join in. Have a note taker for each session.
  - b. Pair developer and community leader together to brainstorm ways to engage better.
  - c. Engage an additional ULI TAP for more interviews.
  - d. Create a citizen-led group to work with the City and Developers to continually improve the engagement across the city.
2. There needs to be clear leadership for each community sector.
  - a. The City should serve as a network facilitator to connect the right people for full engagement.
  - b. Must be term limits to prevent any one individual's views dictating the community's interests.
3. Education on community engagement is paramount so that benefits can be better aligned with the engagement process for the greatest chance of success.
  - a. All stakeholders, including city staff and officials, community groups and developers have a role to play in this education process.
  - b. Emphasize need for public engagement to create long-range plans, small area plans, the UDO and rules of engagement so that benefits are clearly identified and baked into the development framework before any project gets underway.
  - c. Set reasonable expectations about the benefits that can be derived from any single development project.
  - d. A community education toolbox needs to be a priority.
    - i. Utilize existing resources and amplify them (Academy).
    - ii. Legal services.
    - iii. Information about how city and county function.
    - iv. Information about how development works.
4. Every City department should have a community engagement policy.
5. Support land banking concept for neighborhoods to plan for larger uses that are needed in the neighborhood.
6. Create three buckets of benefit types (site-specific, neighborhood-wide, city-wide). Address the tools, roles, and timing of each separately. The following questions will help to identify which bucket is best suited for the benefit:
  - a. Who does the benefit impact (both positively and negatively)?
  - b. Whose approval is required to make the benefit a reality?
  - c. Who enforces the benefit?
  - d. How long will it take to envision and agree on the benefit details?
  - e. How long does it take to implement the benefit?
  - f. How does the benefit get paid for?



- g. How is the benefit maintained in the future?
7. Potential Tools for Site-Specific Benefits
    - a. Community-engagement workshop to finalize the following:
      - i. What site specific benefits are communities currently asking for?
      - ii. Are those benefits currently addressed in policies?
      - iii. How can those benefits not addressed be updated in policies?
      - iv. Educational resource added to community toolkit to help communities understand how their interests are protected in by-right development.
    - b. Rezoning Site Plan; as currently operating with potential tweaks:
      - i. Clear definition of Community needs to be given to a developer.
      - ii. City needs to notify adjacent neighbors of the potential rezoning at application and not just at community meeting. Utilize technology for more reach.
    - c. Community Benefits Agreement for projects utilizing public dollars (note the term Community Benefits Agreement has many meanings and will be defined in the July report).
    - d. Required neighborhood meeting for neighbors to learn what is coming in their neighborhood.
      - i. As part of rezonings (as currently operating).
      - ii. For large-scale, by-right developments (need to define threshold for each zoning type. Must happen prior to land development permit application.
      - iii. While no benefit is required in the meeting, conversation can lead to potential win-wins.
      - iv. Record community meetings for community members who cannot attend meeting to watch or review at a later date.
  8. Potential Tools for Neighborhood-wide Benefits
    - a. Small area plans to set a guide for future developments.
    - b. Community Investment Plans
      - i. Provide target infrastructure areas.
      - ii. Set up parameters for tax increment financing of infrastructure.
      - iii. Encourage development projects to contribute towards infrastructure through a higher match of tax increment financing to private dollars.
  9. Potential Tools for City-wide Benefits
    - a. Create a central repository of community comments that can be analyzed so repetitive comments trigger action to study.
    - b. Tax freeze to reduce displacement occurring with gentrification.
    - c. Continue City committees to push for strategies addressing city goals (ex: affordable housing).
  10. Centralized online tool for tracking and finding all physical change across the city – public infrastructure and public/private developments.

## Appendix B: Biographies



### Panel Chair: Rachel Russell Krenz Director, Ram Realty

Rachel Russell Krenz is a real estate developer, city planner, preservationist, community advocate, New Orleans native, and resident of Charlotte, N.C. She manages and executes development opportunities for Ram Realty in the Carolinas. Ram is an affiliated group of companies and partnerships that acquire, develop, and finance retail and multifamily properties in the Southeast. Mrs. Krenz's professional

background in place-making includes her work at the National Trust for Historic Preservation and as vice president of real estate development for Grubb Properties and Milhaus. She is an active member of the Urban Land Institute (including WLI 2019 Real Estate Champion, past national Multifamily Council, and Urban Plan volunteer.)

Mrs. Krenz has a master's degree in city and regional planning from the University of North Carolina with a specialization in real estate development and design. Her education also includes an undergraduate degree from Sewanee: The University of the South, a graduate-level Certificate in Historic Preservation from Goucher College, and real estate-focused coursework at Kenan-Flagler Business School.

Notable neighborhood work includes her involvement in the South End Board Committee, founder of Montford Park Partners, North Tryon Vision Plan Steering Committee, Glen Lennox Neighborhood Conservation District and Development Agreement, and Villa Heights Neighborhood. Select projects from Mrs. Krenz's development portfolio include Hub South End (Charlotte), Hawk (Charlotte), Glen Lennox (Chapel Hill), Link Montford (Charlotte), Link West End (Greenville, SC), and Link Innovation Quarter (Winston Salem).



### Panelist: Sherry Okun-Rudnak Partner, BAE Urban Economics

Sherry Okun-Rudnak has more than 20 years as a land-use economist and real estate advisor. She is a principal and partner at BAE Urban Economics, an award-winning urban economics and real estate advisory firm serving California and the United States since 1986. She specializes in providing economic development support, market studies, financial feasibility analyses, economic impacts analyses,

and development advisory services to BAE's clients.

Sherry's experience includes leading a range of plan and project engagements on topics of commercial development, residential development, hotel impacts, transit-oriented development, employment, jobs/housing balance, recycling policies and the arts. She recently completed an Equitable TOD analysis for the Metropolitan Atlanta Rapid Transit Authority (MARTA), which included a market analysis and development feasibility testing to promote development policies that support job creation and minimize residential displacement. She also assisted the cities of Charlotte, NC, and Tempe, AZ, in crafting voluntary development bonus programs that promote the delivery of community benefits.

Sherry is a full member of the Urban Land Institute and a member of the Urban Revitalization Council. She is also an adjunct instructor in the Price School of Policy Studies at the University of Southern California, where she teaches the intersection of planning and real estate development.



**Panelist: Mack Paul**  
**Partner, Morningstar Law Group**

Mack Paul is a real estate attorney who focuses on zoning, land use, environmental permitting, public financing, and public policy. He specializes in obtaining regulatory approvals for large, mixed use developments and urban infill projects, negotiating public-private partnerships, and securing public financing for infrastructure to support development projects.

As a land use lawyer, Mack represents owners, developers, coalition groups and businesses in all types of development and infrastructure issues, such as negotiating a joint agreement with a major city and conservancy to develop a destination park, and utilizing innovative financing tools to fund structured parking in connection with a conference center and hotel in a

resort town. In addition, Mack represents local governments, property owners and environmental groups on a variety of coastal issues involving fisheries, sea level rise, coastal development, and large infrastructure projects such as inlet relocations.

Mack is active with green building and smart growth initiatives. As a founding member of Triangle Growth Strategies and the Triangle Smart Growth Coalition, he works to bring together environmentalists and home builders on common growth principles. He has also been instrumental in helping develop guiding principles for the region's future growth, including transportation plans.

Outside of the office, Mack has a passion for politics. He has participated in numerous political campaigns and political activities at the local and state level, including serving as chairman of the Wake County Democratic Party. His strengths: fundraising, coalition building, and advising on transportation and urban issues.



**Panelist: Yolanda Taylor**  
**Attorney, Yolanda L. Taylor, Law Firm**

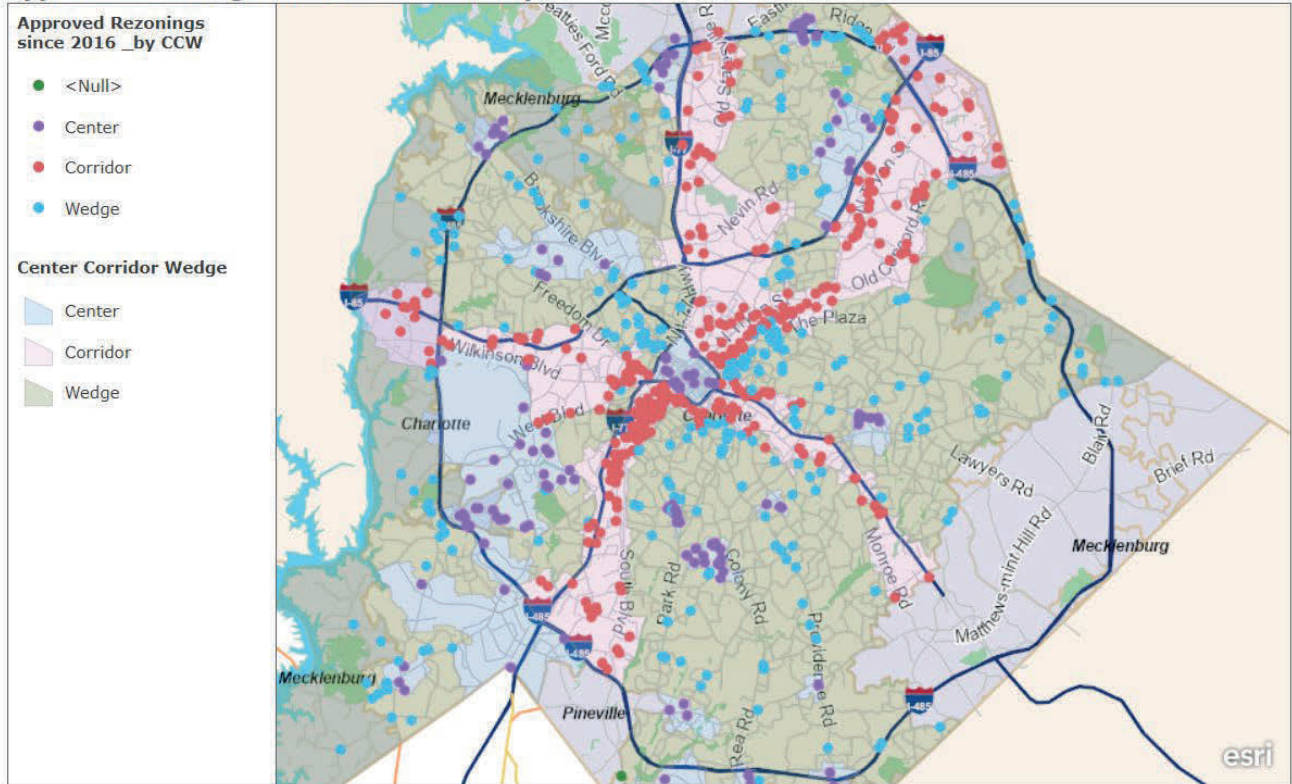
Yolanda Taylor is a former managing attorney with Legal Aid of North Carolina, where she practiced primarily in the areas of housing, fair housing, and community economic development law. In 2019, she was recognized as a Leader in the Law by the NC Lawyers Weekly magazine and was awarded the Gwyneth B. Davis Award for Public Service by the NC. Association of Women Attorneys for the work she did with

grassroots community groups looking to shape equitable housing and development policies.

Ms. Taylor is also an adjunct professor of law at Wake Forest University, where she teaches Introduction to Community Lawyering, a method of lawyering that supports grassroots community groups looking to co-create housing and zoning policies with their local governments. Ms. Taylor assists communities in finding solutions to issues involving affordable housing and gentrification. During her spare time, she sits on the boards of Wilson Arts, the African American Cultural Festival of Raleigh/Wake County, and Rolesville Charter Academy. She lives in Wake Forest, NC, with her husband, Eugene Taylor, their two daughters Chloe (10), Sasha (7), and their lab/pitt Trevor.

## Appendix C: Approved Rezoning

### Approved Rezoning since 2016 - Heat Maps



This map shows rezonings since 2016 by heat map symbology

Innovation and Data | Data is collected and maintained by The Charlotte Mecklenburg Planning Department.

# Approved Rezoning since 2016



Center for Data and Analytics

## Approved Rezonings since 2016 - 833 Total

- Conditional - 631 (76% of total)
- Non-conditional - 202 (24% of total)
- TOD Rezonings - 2019-102, 2018-169

## Council Districts

- 1
- 2
- 3
- 4
- 5
- 6
- 7

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