

# TOWN OF MONTREAT

## Open Space Conservation Plan

Adopted by the Montreat  
Board of Commissioners:  
October 11, 2007

*Amended February 26, 2014*



# **Town of Montreat North Carolina**

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## **Open Space Conservation Plan**

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Adopted October 11, 2007  
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OPEN SPACE CONSERVATION PLAN  
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# **TOWN OF MONTREAT OPEN SPACE CONSERVATION PLAN**

## **SECTION ONE: INTRODUCTION**

The Town of Montreat's distinctive sense of place did not happen by accident. Rather in 1897, careful planning by John C. Collins, a congregational minister from New Haven, Connecticut, led to the development of a community "established primarily as a health and rest resort to be composed largely of Christian people and secondly, for religious and educational purposes." Since its purchase by individuals, mostly southern Presbyterians, in 1906, endorsement of that purchase by the Presbyterian General Assembly in 1907 and municipal incorporation in 1967, Montreat has experienced considerable changes in land use patterns. Once a sparsely populated rural farm community, today Montreat is a rich mosaic of landscapes - mountain woodlands, residential neighborhoods, and institutional properties.

### **Purpose**

The purpose of the Open Space Conservation Plan is to enhance the Town's ability to protect lands with high natural resource value. More specifically, the Plan aims to:

- provide the strategies, plans, and guidance that will realize the Town's long-term vision for conserving important open spaces and natural resources;
- establish a ranking system to set priorities for use when evaluating properties in the Town for conservation;
- inform the public on open space and land conservation issues, policy, process and plans;
- enhance public awareness about the benefits derived from - and threats posed to - Montreat's diverse natural resources; and
- establish and guide the use of the Town's Conservation Fund.

The challenge facing the Town today is to balance and maintain current, as well as future, land uses without severing historic links to the past or jeopardizing the quality, integrity, and character of the town.

### **Vision Statement**

It is the community's vision that:

The natural resources and open spaces that make Montreat a desirable place to live shall be conserved for future generations to enjoy and appreciate. This conservation shall occur in the context of a community that is also growing and changing. The character of Montreat will continue to be defined by the Town's small-town, spiritual atmosphere; its natural, recreational, and educational assets; and its long-standing traditions.

Those areas with high natural resource value and that are important to Montreat will be subject to careful stewardship. These areas include places deemed of local importance as well as those of regional or statewide significance. Particular importance will be placed on lands whose development would have an undue, adverse effect on water quality, wildlife habitat, and scenic areas.

The Town will protect and conserve its forestland, core habitat areas important to flora and fauna, and corridors that link these core areas. Because personal connections with nature are important to maintain Montreat's heritage and sense of community, low-impact recreational opportunities that do not alter natural areas will be encouraged. The Town will be a place of natural beauty and scenic views.

### **Definition of Open Space**

For the purposes of this Plan, open space is defined as an area of Montreat's landscape that is essentially undeveloped, such as ridges, streams, and woodlands. Open space lands typically have no buildings or other complex human-made structures in current service. These lands may be in their natural state, serving important environmental and/or aesthetic functions, or they may be used for agriculture, forestry, and/or low-impact recreation. They help maintain the condition and function of Montreat's natural resources, essential to the Town's outstanding quality of life.

### **Typology**

Open space can be publicly or privately owned and may or may not be legally protected. It includes forest land, scenic lands, nature parks, and preserves, as well as water bodies such as lakes and streams. Land defined as open space depends in part on its surroundings. In Montreat, someone's backyard or a narrow corridor surrounded by developed areas is not considered open space, even though the same property might be considered as such in a larger town or city. However, size is not a limiting factor of open space. Whatever the size, ownership status or landscape context, open space always serves to protect sensitive ecosystems, scenic landscapes, water resources, and other important features of the natural and human environments. Finally, protection of open space may not always include public access. Indeed, public access might be incompatible with other open space uses such as wildlife habitat, fragile plant and animal communities, flood control, or water supply. In addition, public access might be incompatible with an individual property owner's right to privacy.

### **Focus on Lands with Conservation Value**

The definition of open space provided above suggests three key land types, which are detailed as follows:

Natural Areas - Unique or irreplaceable features of the natural landscape, including (but not limited to) areas supportive of wildlife habitat, unusual plant species, and geologic features.

Montreat is rich in natural resources that benefit the community, the state and beyond. Core habitat areas provide living areas for diverse populations of native aquatic and terrestrial species. Riparian areas provide multiple functions, including wildlife habitat, flood protection, and natural filtration of harmful contaminants and excess nutrients. Cliff areas provide scenic vistas and a snapshot of the geologic history of the region as well as unique wildlife habitat. Exemplary sites such as the Walk Jones Wildlife Sanctuary and the Mountain Retreat Association Conservation Easement/Wilderness provide critical protected habitat for rare species and natural communities and should be buffered against encroachment.

Low Impact Recreation Areas - Areas which promote the physical, social, and spiritual well-being of the Region's people by helping to meet their needs for recreation, community, and/or connection to the natural landscape.

Low-impact Recreation Areas offer places for Montreat residents to gather, commune with nature, and enjoy physical activity, such as walking, hiking, or running, without significantly altering or degrading the natural environment. Important examples in Montreat include the Gate Trail, Harry Bryan and Julia Woodward Trail, Old Mitchell Toll Road, the Trestle Road and the many other trails found in this valley. In the context of this Plan, the values provided by Low Impact Recreation Areas are largely a secondary benefit provided by Natural Areas.

Viewscape Areas - Areas that significantly contribute to the aesthetics, scenic integrity or overall character of the landscape.

The visual surroundings of any community are generally a key part of its sense of identity and heritage. Landscape viewing can be evaluated at different distance zones (e.g. foreground, middleground, background) or in terms of focal points (i.e. elements of view that tend to draw or capture the eye). Set within a broad valley on the edge of Lake Susan, with rolling woodlands, the Town has a rich diversity of viewscape areas. These give the town its character, provide a sense of place and peace, and help connect residents to their environment. Examples include the viewscales across the undeveloped portions of Lookout and Greybeard Mountains.

### **Benefits of Open Space**

The benefits of open space and natural-resource conservation are numerous and varied, encompassing both tangible and intangible values. For example:

- **Net gain for Town budget** – Several studies have concluded that maintenance of open space saves the Town money by reducing the growth in demand for local services, such as water and sewage treatment, fire, police, and roads. Conservation easements can cause a reduction in tax revenues. However, some studies indicate that if the open space land were developed into residential properties, the tax revenue generated for the Town typically

would be **less** than the cost of the additional services required by the new development - resulting in a net loss for the Town.

- **Enhanced property values** – Property values within a community tend to remain steady or increase where communities place a high value on preserving their environmental and scenic resources.
- **Protection of water quality** – Maintenance of open space, such as forests and fields, protects surface and ground water resources by acting as a natural filter for removing chemicals, debris, and other pollutants before they enter the Town’s water system, reducing the need for expensive filtration systems. Montreat relies on seven wells for its drinking water. Water resources located in Montreat, including areas along Flat Creek, Big Piney and Kitchen Branch all affect our watershed and thus the quality of our water for drinking and recreation.
- **Habitat Conservation** – Open spaces often provide critical habitat for a wealth of animals and plants, including rare, endangered and threatened species. These habitats can include intact ecosystems or corridors that permit movement and dispersal. Conservation of natural open spaces maintains habitat diversity, which in turn is essential for biological diversity. These areas thus preserve a legacy that is passed from one generation to the next.
- **Economic Opportunities** – Open space, woodland landscapes, and scenic vistas are important to the Town’s quality of life and sense of community, making them an important factor in attracting visitors who come to Montreat to experience spiritual retreat and renewal, enjoy the historic setting and picturesque mountain vistas. The economic activity generated by visitors, benefits the Town and its resident institutions creating a positive return on its investment in open-space conservation.
- **Physical benefit from low-impact recreational opportunities** – People use open space for a variety of physical activities that do not require alteration or degradation of the landscape, such as walking, hiking, biking or rock hopping.
- **Psychological benefits of tranquility and stress reduction** -- Nature is an effective stress reducer because it provides a kind of "cognitive quiet." Studies show that direct or vicarious experience with natural areas, even the passive viewing of natural environments, brings both physiological and psychological benefits.
- **Community cohesion** – The natural, spiritual and historic landmarks of the Town are a common heritage. They serve as a common ground, acting as a social center, and encouraging community cohesion.
- **Education** – Forests, wetlands and other natural areas offer unique opportunities for educational events. These experiences may involve direct interaction with the natural environment or simply serve as the setting for these educational programs. Providing this type of access helps build the understanding and respect that inspires future generations to conserve these resources.

## **Need for Additional Open Space**

With its proximity to Black Mountain's and Asheville's unique combination of natural beauty, attractive neighborhoods, and commercial amenities, Montreat is a dynamic and highly livable community. The town's close proximity to commercial infrastructure permits convenient access to many essential businesses and services. Thus, Montreat permits its residents to live and work in an attractive and fulfilling natural environment while simultaneously remaining close to places of work and business. Yet, Montreat's very desirability is an agent of change that could diminish the characteristics that define the town and make it appealing as a community. Expanded residential development and tourism has prompted a related expansion in the need for municipal services and further division of parcels. This development and redevelopment will likely continue to occur well into the future.

In conjunction with the Town's current Comprehensive Planning process, the community response has shown that there is strong sentiment in Montreat that the town's unique characteristics should be preserved to the fullest extent possible. Action is needed now to ensure that Montreat's most valuable open spaces remain a vibrant and integral part of the town's economic, cultural, and spiritual identity. This plan helps identify specific priorities and the conservation methods that can be used to attain them.

To accomplish this goal, some land or lots that offer high-quality natural resources must be permanently protected. Protection can be achieved in a variety of ways: acquisition of easements, which allow property to remain in private ownership; therefore, they allow families to transfer conserved property from generation to generation while limiting development; alternatively, conservation can be achieved by "fee simple" gift or purchase, which transfers ownership of the land to a municipality or land trust.

## **Organization of the Plan**

As part of town-wide planning efforts, the Montreat Board of Commissioners guided the development of this comprehensive and community-based Open Space Conservation Plan focusing on protection of open space with significant natural resource values.

Section One has defined open space and its benefits and the need for additional open space. Sections Two through Four address the overall process for the acquisition of open space including land inventories and establishing a tool for setting priorities. Sections Five and Six focus on the execution of the plan with its attendant strategies and actions. The Appendix outlines possible funding sources for conservation measures. This plan will evolve and must be regularly updated. As the scope of this plan is limited (i.e., it focuses on protection of open spaces with significant natural resource values as opposed to, say, open space valued solely for recreational use), future plans may need to look more broadly at open space.

**TOWN OF MONTREAT  
OPEN SPACE CONSERVATION PLAN**

**SECTION TWO: EXISTING OPEN SPACE LANDS**

**Open Space vs. Protected Lands**

A critical, often overlooked distinction is that lands commonly viewed as open space may or may not be legally protected against permanent alteration. As already described in this plan, open spaces are quite varied and serve many different functions.

Depending on the actual ownership, public access to the properties encompassing these features may be encouraged or implied, further deepening the community's perception of undeveloped land as a community resource. It cannot be assumed, however, that properties will always remain in their current state of ownership, management, or public access. In reality, a specific legal protection such as a conservation easement or deed restriction must be put in place to guarantee that a property will remain in an undeveloped state. Without safeguards, municipal, state, or federal planning requirements cannot be considered absolute deterrents to development of important or sensitive properties.

Similarly, it is short-sighted to assume that a property will be protected because it: has a some unique or sensitive feature; is immediately adjacent to already-conserved land; lies within a restrictive zoning district; is isolated from town services; has unusual or difficult topography; is land-locked by other parcels; and other circumstances. Variances from existing zoning laws may allow development of seemingly unbuildable properties, and legislative and regulatory mandates may change over time.

In establishing priorities for conservation, this vital distinction between open space and protected lands must be carefully considered: which open space lands in Montreat are legally protected from development and which have no protection? While threats to important natural resources can then be evaluated on an individual basis, some lands will receive high priority even when no imminent development pressures exist. If an opportunity arises to conserve a property with significant natural resources, it may be advisable to pursue the project when circumstances are favorable. In a town like Montreat, where development pressures are high and will likely remain so indefinitely, limited time and money must be directed to the highest-value open space lands that have no form of protection, capitalizing on opportunities when they exist but keeping in mind that optimal circumstances may never arise.

**Open Space Categories**

Map 1, which was developed during the Comprehensive Planning Process, show areas that depict the location of "open space" lands, their juxtaposition to residential areas and other use types. It is important to note that open space is distributed throughout the Town, and that the

open spaces depicted are not homogenous; lands shown are maintained for a variety of different reasons and have varying levels of legal protection.

The maps show open spaces in categories:

- **Conservation Easement Lands;**
- **Institutional Lands;**
- **Town and State Lands;**
- **Unprotected Mostly Undeveloped Lands** over two acres in size;
- **Other Lands**, including developed and developing lands.

As used in this Plan, these categories will show the level of legal protection afforded individual properties.

The first category, **Conservation Easement Lands**, refers to privately-owned properties that are under easement to a conservation organization. An easement is a voluntary agreement that usually provides binding, permanent protection. In Montreat, this category pertains primarily to the Mountain Retreat Association conservation easement where specific legal protection is in place to prevent conversion of these properties to developed uses that permanently alter the landscape.

**Institutional Lands** refer primarily to properties under the control of the Montreat Conference Center, Montreat College or similar entity, where deed restrictions typically are in place to restrict intensive development of a parcel. However, the actual level of protection varies, is often quite limited, and reflects the management objectives of the institution. Furthermore, in many cases an institution could vote to change permitted land uses or even extinguish all restrictions. Note that, for mapping purposes, this category also includes special cases such as the open space portion of the Wilderness Area.

As might be expected, the category **Town and State Lands** includes properties owned by the Town of Montreat or the State of North Carolina. Town-owned lands are generally not encumbered by legally-binding measures ensuring that lands will remain in an undeveloped state, and even those properties that are widely considered to be conserved open space (e.g., Well-house sites, Rights-of-Way) could be converted into a different use. Some lands in this category are already developed (e.g., parking). Other types of state lands (e.g., forests, parks), would generally have higher levels of protection.

The final two categories address the remaining land area in the Town. The category **Unprotected Mostly Undeveloped Lands** includes undeveloped or largely undeveloped properties of at least two acres. These lands are not conserved and, assuming development proposals meet pertinent regulatory requirements, could be converted to other land uses even if they have high value as open space and are used as such by the community. The category

**Other Lands** completes the map. It includes developed and developing lands and generally consists of properties that have been or are in the process of being converted to primarily developed uses.

These categories pertain specifically to the open space lands that currently exist in Montreat; other categories may be added if other types of public or private conservation organizations occur. Additional categories would also depend on the level of protection afforded against conversion to developed uses. The current set of open-space categories are based exclusively on assumed protection level and make no inference about public access, which depends exclusively on the policies of individual landowners. Most publicly owned lands are open to the public, as are certain privately-owned properties (e.g., Hiking Trails located in the MRA Conservation Easement, MRA Camping Ground), but other properties are restricted.

Most existing open spaces in Montreat occur along ridgelines and wilderness areas. Given their high ecological and aesthetic value, these areas have been the historical focus of conservation efforts. The Mountain Retreat Association and Town of Montreat jointly control areas known as Greenspace. These areas generally are dedicated in perpetuity to the Town and the public for recreation, fishing, greenspaces, beautification and street, bridge, and utility rights-of-way.

**TOWN OF MONTREAT  
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**SECTION THREE - RESOURCE VALUE ESTIMATION**

**Methods Summary**

While developing this plan, the Open Space Conservation Plan Sub-Committee, also referred to as the Open Space Committee, will work with Town staff to use a land conservation tool for setting priorities. This tool will calculate the number of acres of a resource and/or the number of resource features of a given type falling within each parcel in the Town. Resources evaluated by the system fall within three primary areas: water resources, wildlife habitat, and scenic resources. Specific data inputs used by the tool will be based on priorities expressed by the Town Council, availability, and utility. Note that the tool is not static; it can be improved as new and perhaps better data become available (e.g., improved land cover or wildlife-corridor maps).

Once a list of land conservation priorities has been applied, the relative weight or importance of each resource feature results in 'weighted priority' categories. In the course of using the tool, staff will establish "cut-off" points to differentiate four conservation-priority categories: low, medium, high, and highest, using scale of 0 to 100. Results will be a starting point for discussion, not a definitive measure of significance.

**Establishing Property Priorities**

Using an initial set of cutoff values, the tool will identify roughly Montreat's land area as having "Highest," "High," "Medium," or "Low" resource value. These percentages will be displayed as a percentage of the total land area in Montreat. For example, under one scenario, the following levels of Resource Value may occur:

**Level of Resource Value**

5%	None
35%	Low
18%	Medium
7%	High
35%	Highest

Maps developed by the Open Space Committee will show ownership and how individual parcels scored according to the resource value calculated by the tool for setting priorities. Not surprisingly, high-value areas will likely be identified along the Montreat Greenspaces and the MRA Conservation Easement. These areas contain the largest undeveloped (or minimally-developed) parcels in Montreat, and they also contain some of the most important wildlife habitats, scenic viewsapes, and water-quality protection zones. This tool is generally biased toward large parcels because they provide the most cost-effective, comprehensive way to

conserve natural resources. However, this does not preclude protection of smaller parcels, though they are less likely to contain significant features and often have been heavily modified. The tool for creating priorities generally identifies those parcels that have the strongest combination of features that are routinely evaluated in conservation projects. As always, the conservation merits of any parcel must be examined individually.

## **Data in Land Conservation Tool for Setting Priorities**

### **Feature Description Data Source**

- Wetlands – Identified wetlands (if any)
- Adjacent area stream buffers - Lands within 50 feet of all mapped streams
- Non adjacent area Stream buffers - Lands between 50 and 100 feet from all mapped streams
- Stream information
- Wilderness Areas
- Conservation Easement lands
- Natural Heritage buffers - Lands within buffer of Natural Heritage sites
- Historic or Cultural Landmarks
- Wildlife corridors - Lands within mapped wildlife corridors
- Forest Land cover - Areas identified as being occupied by forest
- Adjacent to Conserved lands - Land in parcels located adjacent to lands with permanent, high level conservation protections and Town open space
- Foreground View area - Lands falling within Foreground View as identified in Town Significant View study
- Middleground View area - Lands falling within Middleground View as identified in Town Significant View study

Another important feature to note is that the tool for setting priorities considers all parcels, regardless of current protection status. Already conserved lands, such as the MRA Conservation Easement, may score highly because their natural resources are inherently noteworthy, not because they form a network of existing protected lands. After resource values have been examined town-wide, conserved lands can be removed from the list of priority areas, while other areas that have high value and are unprotected. These areas may thus become the focus of conservation efforts, helping to direct resources into the most effective and timely investments.

### **Natural Resource Value Summarized by Open Space Category**

As noted above, protection status is a vital consideration in setting priorities for conservation efforts. In this Plan, lands at risk of being permanently converted to developed uses are considered to be unprotected. This plan also recognizes that the actual degree of protection afforded individual properties varies widely, from some that prohibit all forms of development; others that may be developed for selected uses such as recreation or the construction of buildings; some protected temporarily; to those protected on a permanent basis. This Plan offers the tool for protection of land with high resource in perpetuity, a more efficient use of available conservation funds.

The first work of the Open Space Committee will be to measure land parcels in the categories given above; note acreage designations; then, to assign priority values as described above. By comparing the results of the tool for setting priorities with the classification of existing conservation lands, it is possible to identify high-value lands that are currently unprotected. A key recommendation of this Plan is that unprotected properties with high natural resource value should be the focus of Town conservation efforts.

**TOWN OF MONTREAT  
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**SECTION FOUR: CONSERVATION PRIORITIES**

**Introduction**

Given the intensity of development pressures in Town, it is a certainty that some of these Montreat's high value undeveloped lands will be converted into residential development, with attendant loss of open space and alteration of the Town's fundamental character. However, Montreat residents have consistently shown an interest in and commitment to open-space protection and it is not too late to conserve a substantial portion of the Town's natural heritage. Indeed, the Town has already made notable progress in conserving land and maintaining its cultural identity, with contributions from many organizations and concerned citizens, but more time, effort, and money is needed.

Accordingly, the Town should identify, set priorities, and actively work to conserve land with high-value natural resources that are currently unprotected. All conservation models and methods should be considered, including direct ownership by the Town and purchase of development rights through conservation easements. If necessary and appropriate, the Town should use money from the Open Space Fund to help finance these efforts, but whenever possible other sources should be used. In addition, the Town should actively collaborate with local institutions as well as other public and private entities to identify and protect open space lands.

In setting priorities for conservation, this Plan focuses on the ecological, aesthetic, and water-quality benefits of open space; these values have been consistently identified as most important by citizens and require little or no financial investment (beyond the original cost of conservation) or maintenance. However, low-impact recreation will be permitted on Town-conserved lands when it does not detract from other open space values or conflict with private-property rights. Usually, recreational opportunities will be provided by unpaved, minimally-maintained trails that permit walking, picnicking, and similar non-motorized activities. Where appropriate, public access provisions will be included in conservation easements on private lands.

**Focus on High-Value Lands**

When high-value open space lands (as determined by the tool for setting priorities, the opinion of the Open Space Committee, Board of Commissioners, and other criteria) are available for purchase from a willing seller, the Town and its partners should make a reasonable effort to conserve these lands through direct acquisition, easement, gift or another established protection mechanism. Any transaction involving the Town will, of course, be contingent on the availability of funds and approval of the Board of Commissioners. When the Town cannot contribute funds to a worthy Town conservation project, the Town will work in cooperation

with and encourage local institutions and organizations to actively pursue effective protection strategies.

Initially, conservation efforts should focus on high-value lands adjacent to other protected properties. It is vital to continue this focus until they are protected to the fullest extent possible. This approach will maximize the value of previously-spent conservation funds and complete long-held priorities. When the initial goals have been satisfied, emphasis will be shifted to other high-value lands, including:

- Other riparian zones
- Remaining forest patches
- Land with exceptional views
- Land with unique or rare features

Whenever possible, the largest undeveloped parcels containing high-value resources should be conserved first. This policy will simultaneously maximize conservation funds and natural-resource benefits.

It is important to reiterate that the focus on high-value lands does not preclude conservation of lesser-value properties. The priorities described here will guide, but not explicitly dictate, conservation initiatives and use of the Open Space Fund; as always, potential projects will be evaluated on their individual merits. Worthy land-conservation efforts will be considered in every section of Montreat, including all zoning districts. Widely-dispersed conservation lands will help maintain wildlife corridors and will provide immediate access to open space for adjacent neighborhoods. However, this Plan cannot guarantee an even geographic distribution of conservation land, and a project's collective benefit to the Town will always be the most important determinant.

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**SECTION FIVE: ACTION PLAN FOR CONSERVATION**

**Introduction**

This section describes recommendations for activities for conserving new properties and managing already conserved properties, especially those conserved through use of the Open Space Conservation Fund and owned by the town. It includes activities that will provide up-to-date information on natural resources within the borders of the town that allow the Board of Commissioners to identify important high-value lands. Other recommended actions will help to ensure that land conserved using the Open Space Conservation Fund will be managed in a manner consistent with the intent of residents, to keep the land undeveloped and in its natural state.

**Development of Open Space Fund**

Land conservation is often (some would say unavoidably) a reactive process; individuals and institutions marshal effort and money to protect property when it is placed for sale on the open market or an imminent threat becomes apparent. With an Open Space Fund and an accompanying plan in place to guide its use, Montreat can respond to these eventualities. Land values are high in Montreat, meaning that conservation efforts depend on timely and adequate fundraising. Although Montreat's Open Space Fund is initially proposed at a rate of approximately \$25,000 annually, the potential cost of even a "low activity" conservation program may be as high as \$150,000 per year. With a larger Open Space Fund, the Town will be better able to respond quickly and effectively to prospective conservation projects, and it will be better positioned to leverage funds from other organizations. To facilitate this increase, it is imperative that the Board of Commissioners and other interested citizens continue the long-standing effort to educate the Town about the costs, benefits, and value of open-space protection.

**Landowner Outreach**

Rather than merely be responsive to development proposals, the Board of Commissioners should proactively reach out to landowners whose properties fall within the Town's natural resource priorities before they decide to sell or develop their land. This outreach can take the form of both education to encourage private conservation efforts and information about sound land-management practices. Information about the many conservation strategies currently available and the organizations that practice them can help large landowners plan for a future that will both meet their own economic needs and protect the Town's natural heritage. If landowners have this information in advance, they are more likely to practice responsible land management and to be receptive to conservation-minded alternatives to conventional development options.

As part of the Town's landowner outreach activities, owners of properties with significant resources may be offered information regarding actions that they could take to maintain or enhance these assets. These options could range from limiting development on the property (easement, transfer of development rights) to preserving a buffer space around sensitive areas. These owners may also be made aware of the opportunities provided by the Town's Conservation Fund. Funding for these activities should be built into the annual budget approved by the Board of Commissioners.

### **Support Neighborhood Initiatives**

Neighborhood groups should be encouraged to develop plans to protect significant resources, through purchase, neighborhood covenants, or non-binding agreements.

### **Encourage Private Conservation Efforts**

Private conservation efforts, including the following, should be strongly encouraged.

- **Naming and/or designating property.** Naming a park or conserved property after an individual or group should be considered when a significant contribution (not necessarily financial) has been made. Commemoration of project donors on a plaque or some kind of signage is an alternative to naming.
- **Voluntary donations to Town conservation fund.** The Town could encourage a regular "giving program" with private funds going to the Open Space fund or a separate maintenance and program fund. One variation of this approach involves the creation of an 'adopt-a-park' program.
- **Establish a "Friends of Montreat Open Space" Group.** Separate from the Board of Commissioners, this group of concerned individuals could provide fundraising and stewardship support for the Town's public open spaces. Conservation organizations often start such groups when undertaking campaigns for an open space acquisition project.
- **Cooperation with Montreat College and Montreat Conference Center.** The Town should cooperate not compete with the conservation efforts of its resident institutions.

### **Expand and Update Resource Mapping**

Advances in mapping technology have expanded the planning capabilities of communities such as Montreat. Residents and officials can now see the interrelationships between features on the landscape and, as a result, are better able understand how changes could affect the character of the community. However, this technology relies on having an accurate and complete digital library of spatial coverages. While Montreat has begun to map more of its resources, additional inventorying of resources should be completed.

Several maps were identified during this Plan's development as being critical for Open Space Planning. While some of these maps will remain essentially unchanged (e.g. Primary Soils, Hydrological features, FEMA 100-year Floodplains), others need to be created or updated through field work activities or by adapting maps when new material prepared by outside agencies or organizations becomes available. Such maps include the following:

- Recreational areas, including trail network (current and proposed)
- Natural Features
- Significant Views
- Historic places, trails, or structures
- Wildlife core habitat and corridors
- Ridge lines
- Significant geological features
- Biological Diversity
- Landscape Diversity
- Historic/Cultural Landmarks

In terms of inventories, Montreat-specific species lists for birds, mammals, amphibians, reptiles, invertebrates, and plants also are needed, which would facilitate assessment of biological diversity and possibly identify additional locations of rare, threatened, or endangered species.

The Open Space Committee, working with the Town Staff, should identify all maps to be updated or created, but balance that need in light of town budget and staffing constraints. The maps should be placed in priority order of need with budget, town staffing, and schedule so that effort can be focused on those that are of highest priority and return to the town. Finally, all existing and new inventories should be updated on a regular basis. As a general principle, this Plan assumes that the availability of better information will lead to better decision making.

### **Create and Maintain Management Plans for Town-Owned Lands**

Management plans are a necessity for town-owned lands. These plans can range from a very simple few pages to more extensive ones. Each one will be different and dependent on the characteristics of the particular property and its intended use.

### **Existing Town Owned Lands**

Management plans shall be developed or updated for parcels that are owned by the Town and have significant resource value. Development of the management plans shall be integrated with existing town staff annual work plans and considering town budget constraints with the goal of completing these plans within a three year time frame for all of the Town properties.

Until such time as a Permanent Management Plan is approved for a property, development or alterations of any type can only occur with necessary town reviews and final approval by the Board of Commissioners.

### **Newly Acquired Lands**

Management plans should be developed for parcels that are acquired by the Town or with financial assistance provided by the Town. Where properties are acquired by the Town without outside assistance and are owned in fee simple, without the granting of an easement, the Town will prepare the management plan according to the guidelines specified below. Where properties are acquired by the Town with outside assistance or where an easement or easements are conveyed to third parties, management plans will be prepared cooperatively with these partners.

### **Management Preparation Guidelines**

The Town Staff will oversee the development of each management plan with appropriate consultation with the Board of Commissioners, other town bodies and parties. Work on development of management plans should be financially supported via appropriations from the general town budget or, where possible, grants and/or donations. Final approval of Management Plans shall be by the Board of Commissioners following a public hearing. Changes to these management plans would occur only after review by the Board of Commissioners and inclusion on the agenda.

### **Stewardship Coordination**

Once a town-owned parcel has a management plan, the Board of Commissioners, with input and recommendations from the Open Space Committee and the Town Staff, will consider applicants as early as practicable and appoint the Environmental Commissioner to be Stewardship Coordinator for these lands. This position would require one or more visits each year to the property to ensure that the principles of the management plan are being achieved. Stewardship Coordinators should report to the Board of Commissioners and the Open Space Committee at least annually. The Board of Commissioners would recommend appropriate actions to the Town Administrator and/or Environmental Commissioner, as needed.

### **Conduct Regular Updates to Open Space and Natural Resource Conservation Plan**

This Plan should be reviewed and updated as necessary, but at no less than five year intervals. The Priority tool should be revised and updated as necessary.

**TOWN OF MONTREAT  
OPEN SPACE CONSERVATION PLAN**

**SECTION SIX: PROCESS FOR USE – OPEN SPACE CONSERVATION FUND**

Through the Comprehensive Plan surveys, Montreat residents have expressed strong support maintaining traditional focus on land conservation. Following this, the Town Council has set aside a budget item for the Town Land Conservation Fund (“Conservation Fund”). Typically, this fund will be used to leverage money from state agencies and non-profit land conservation groups (see Appendix for options); or, to provide funds to facilitate projects (i.e. deed preparation, surveys) authorized for inclusion in the Open Space Initiative. The Town’s Open Space Committee, working with the Town staff, will screen potential properties against the set of qualitative criteria listed in previous sections, for consideration by The Board of Commissioners.

**Direct Conservation Funds to Parcels with Significant Open Space Values**

The Conservation Fund will be directed to only those undeveloped parcels that have significant natural resource value consistent with the conservation priorities described in Section 4 with this Plan.

Recommendations of the Open Space Committee and Town Administrator will be presented to the Board of Commissioners, usually in Closed Session where detailed discussion of the proposal takes place and is considered in light of and in compliance with the Conservation Fund principles (See below). Closed Session is typically necessary at this point as this would be a negotiation in process between the Town and a landowner and/or other parties.

**Review Applications and Screening Process**

The Board of Commissioners uses a five-step process to determine the suitability of a parcel as follows:

Submission of Application Form: Completion of an application form will allow residents and other concerned parties to nominate parcels for conservation through acquisition, easement or donation. In the very early stages, there will likely be informal discussion prior to the initiation of an application form. The form should provide critical management information (location, price, proximity to other conserved lands) as well as details about its natural resource values and unique features. It should also provide information regarding potential local and regional planning implications, such as proximity to existing conserved lands, location relative to water and sewer service areas, and access to trails.

Preliminary Analysis: Available natural resource maps and information will be queried using ArcView GIS software or other means to screen how well a property matches the community priorities as described in this Plan. The initial check will be to determine if it is a property that is

in the high priority category of the “highest” resource value as described in this plan. The Open Space Committee and/or Town Administrator will check to see if the parcel has any of the following features:

- Lakes, rivers, or streams;
- Mapped wetlands or floodways;
- Habitat for locally significant or threatened species; or
- Significant vistas or landscape features.

On-Site Evaluation: Providing that the parcel has met the basic criteria to this point, a member of the Open Space Committee, the Environmental Commissioner, and Town Administrator will conduct an inspection to determine a property’s suitability for conservation. The Town may elect to have one or more experts or representatives of other Town committees on this visit.

Solicit Input from Town Staff and Committees: With concurrence of the Open Space Committee, the Town Administrator may contact Town committees and Town departments for input. These contacts should include, but not be limited to: Planning and Zoning Commission, Parks and Recreation Committee, Cottager Wilderness & Open Space Committee, MRA Wilderness Committee, and even the general public if that is appropriate in light of a negotiation in process.

Notify Board of Commissioners: The Town Administrator will provide informative discussion or written notice throughout the review process culminating in a written final recommendation regarding use of Conservation Fund. If an application is denied by the Board of Commissioners, the Board of Commissioners will provide feedback regarding the rationale for the denial.

### **Conservation Fund Principles**

The following principles should guide the actions of the Montreat Board of Commissioners with regard to any activities related to land conservation.

- The acquisition or protection of land shall be accomplished only in cooperation with willing landowners.
- The Board of Commissioners shall consider the full spectrum of approaches for funding and acquiring properties or rights in those properties with significant conservation value.
- Members of the Open Space Committee or the members of the Town Council shall serve as the initial contact and coordinating body for applications, purchases, and donations of open space.
- The Open Space Conservation Fund should be directed to those parcels that have a high open space value. When possible, the Conservation Fund should be used to leverage other sources of funds. Conservation Funds shall be used for obtaining qualified conservation

interests including but not limited to fee simple ownership, easements, gifts, rights of first refusal, stewardship endowments, management plans, and costs related to donating a property or conservation easement and creating the initial management plans if that is a responsibility of the town. As ongoing stewardship costs will be part of the Town's annual operating budget, estimates of the costs of this activity will be included as part of the decision analysis presented to the Board of Commissioners.

- All real estate transactions shall include either language that limits development on the property in accordance with a management plan, or transfers development rights to a third party land trust organization or the Town.
- Legal deeds and transactions of property shall clearly delineate the donor's will for future use of the property. Deeds of Gift will guarantee restrictions in perpetuity, if this is the intent of the donor.
- No change/addition to the property can be made until a management plan or transfer of development rights has been established. Development of the initial permanent management plans and attendant costs will be included within the scope of the acquisition. The plan development of will be overseen by the Town staff, and completed within one year of closing.
- All conservation projects to which Town funds are being contributed shall include language in the management plan that the property will be managed in an environmentally responsible manner.
- Members of the Board of Commissioners will recuse themselves when a conflict of interest exists.
- A simple majority of all members of the Board of Commissioners will decide by vote whether Conservation Funds will be used for a parcel.

**TOWN OF MONTREAT  
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**APPENDIX: COST ESTIMATION AND FUNDING SOURCES**

The cost of conserving open space varies according to many factors, including fair market value of the property being conserved, the level of protection being sought (e.g., fee ownership or easement), and related subjects such as potential tax benefits to the seller. The following paragraphs present information relating to the cost of land the Town may wish to see protected and sources of funding that might be used to offset those costs.

**Current and Projected Real Estate Values**

Land values in Montreat are high relative to many locations within Buncombe County. According to the Buncombe County Assessor's office, the cost of open land can exceed several hundred thousand dollars per acre on large parcels. The per acre cost of land in smaller lots is even higher. In addition, land is appreciating in value at a rapid rate. According to the Assessor's office, some properties in the Town are currently increasing in value by approximately ten percent per year.

When land is conserved, it is not always necessary or appropriate for land to be purchased outright. As noted elsewhere in this Plan, acquisition of conservation easements can be a highly effective means to protect open space. The cost of obtaining conservation easements on property in Montreat is believed to range between thirty and ninety percent of market value. *It should be noted that acquisition of easements does not necessarily reduce the size of the Town's tax base.* In certain situations, easements can provide "amenity values" to adjoining properties to a degree that more than offsets any decline in listed value of the conserved property.

**Possible Funding Sources**

Given the price of land in Montreat, the Town's Open Space Conservation Fund may be supplemented by funds from other organizations to adequately address conservation priorities. The following section provides a brief description of possible funding sources.

**Local Funds**

*Open Space Fund*

Residents of Montreat have historically expressed support for conservation and have recently confirmed that value. The Open Space Fund is proposed to allocate an annual appropriation to support acquisition of open space. These public funds may be used to purchase conservation easements or to facilitate donations for both small and large properties and to leverage money from state agencies and non-profit land conservation groups. Contributions to the fund from

residents may be designated for support of a particular land purchase, deed work, surveying or other similar activities.

### *Bonding*

Another mechanism for accessing local funds – for conservation as well as other purposes – involves the issuance of municipal bonds. Typically, conservation related bonds are issued in an amount based on the cost of acquiring rights in a specific property or properties, to pay for the acquisition of those rights. (It may also be possible for bonds to be issued for a set amount but with no particular acquisition in mind, akin to a letter of credit.) Under North Carolina law, any municipal bond request must be approved by voters and the Local Government Commission. Although Montreat does not have a history of using municipal bonding as a means to protecting open space, it is an available option.

### *User Fees and Charges*

Other potential funding sources that may be used for open space acquisition and/or management include real estate transfer taxes, impact fees, developer dedications or in-lieu-of fees.

### **Private Funds**

In addition to donations from citizens, other funding for conservation may be available from or through a variety of private sources including local and national foundations, the Conservation Trust for North Carolina, and the Trust for Public Land.

The mission of the Conservation Trust for North Carolina is to protect the state's land and water through statewide conservation and cooperative work with land trusts to preserve natural resources as a legacy for future generations. Founded in 1972, the Trust for Public Land (TPL) is a national nonprofit working exclusively to protect land for human enjoyment and well-being. TPL is a source of expertise to help generate Federal, State, and local conservation funding.

Other common forms of private funding come through land donations, developing and working with nonprofit partners, and Charitable Remainder Trusts (CRT).

### **State and Federal Funds**

Most state and federal sources of funding cannot be expected to carry much of the burden of financing a Montreat Open Space Conservation Program. Rather these funding sources must be viewed as supplementary to a dedicated, local financing strategy. Fortunately, there are a number of federal programs that offer funding for state and local programs that seek to conserve land and water resources, provide recreational opportunities, or to mitigate the effects of stormwaters. Most programs require state or local matching funds and project eligibility requirements can be quite stringent.

### *State Funds*

The following are examples of selected North Carolina State funding programs for the conservation of open space. These programs include funding dedicated to the conservation of natural areas, recreational land, and historic properties; conservation of land or historic resources of statewide significance; and conservation of locally important recreational or agricultural land, natural areas, and historic properties. Conservation projects eligible for funding typically include acquisition of natural areas that provide habitat for rare or endangered species, acquisition of lands to provide public access to trails or water, greenways, or acquisition of important historic sites for public use.

- Conservation Reserve Enhancement Program (CREP)
- North Carolina's Clean Water Management Trust Fund (CWMTF)
- North Carolina Parks and Recreation Trust Fund (PARTF)
- North Carolina Natural Heritage Trust Fund (NHTF)
- North Carolina Conservation Tax Credit Program
- One North Carolina Naturally

Local projects funded by these initiatives might include: land acquisition to provide access to water for swimming or boating, biking and hiking trails, greenways, or conservation or expansion of parks, forests and natural areas or acquisition of important historic sites for public use.

### *Federal Funds*

Federal funding for land conservation is available through several programs, including:

- Land and Water Conservation Fund
- Conservation and Reinvestment Act
- Non-point Source Implementation Grants
- Pittman-Robertson Act
- Surface Transportation Act
- Federal and State Agricultural Conservation Programs
- Forestry Legacy Program
- Partnerships for Wildlife

Local projects funded by these initiatives might include: outdoor recreation projects, natural resource restoration, protection of water resource areas including lakes and streams, improvement of wildlife habitats, and the acquisition of conservation and scenic easements.