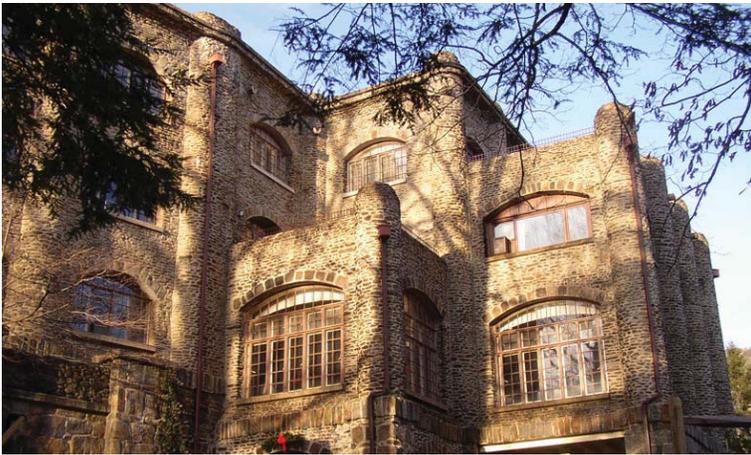
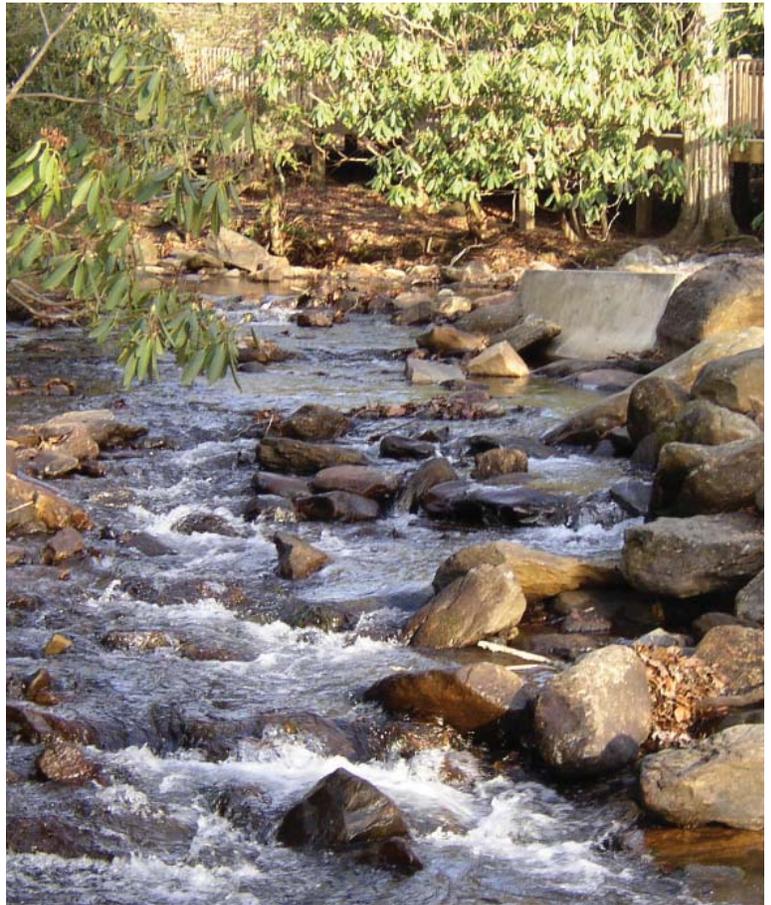


# TOWN OF MONTREAT COMPREHENSIVE PLAN

APRIL 2008



PREPARED FOR  
THE TOWN OF MONTREAT  
96 RAINBOW TERRACE  
MONTREAT, NC 28757

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# TOWN OF MONTREAT COMPREHENSIVE PLAN

April 2008

## CHAPTER 1: INTRODUCTION

1.1 CONTEXT	1
1.2 PURPOSE OF THE PLAN	1
1.3 PROCESS TO DEVELOP THE PLAN	1
1.4 PLANNING AREA	3
1.5 ORGANIZATION	4
1.6 KEY TERMINOLOGY	4

1.0

## CHAPTER 2: MONTREAT TODAY

2.1 CHARACTER & DESIGN	11
2.2 MANAGEMENT OF GROWTH	16
2.3 TAX BASE & REVENUE SOURCES	16
2.4 IMPACT OF MRA & COLLEGE	17
2.5 HOUSING	18
2.6 COMMERCIAL SERVICES	20
2.7 TRAFFIC & CIRCULATION	21
2.8 INFRASTRUCTURE	24

2.0

## CHAPTER 3: MONTREAT TOMORROW

3.1 GOALS	26
3.2 THE PLAN FOR MONTREAT	27
3.3 RECOMMENDATIONS & IMPLEMENTATION STRATEGIES	32
3.3.1 CHARACTER & DESIGN	32
3.3.2 MANAGEMENT OF GROWTH	36
3.3.3 TAX BASE & REVENUE SOURCES	36
3.3.4 IMPACT OF MRA & COLLEGE	38
3.3.5 HOUSING	39
3.3.6 COMMERCIAL SERVICES	41
3.3.7 TRAFFIC & CIRCULATION	42
3.3.8 INFRASTRUCTURE	47

3.0

## APPENDICES

A. 2006 COMPREHENSIVE PLAN COMMUNITY SURVEY INSTRUMENT	
B. 2006 COMPREHENSIVE PLAN COMMUNITY SURVEY RESULTS	
C. LIST OF COMMUNITY STAKEHOLDERS INTERVIEWED	
D. GOVERNMENT TAXES AUTHORIZED BY LOCAL ACT OF THE GENERAL ASSEMBLY	
E. SOURCES OF REVENUE FOR MUNICIPALITIES IN NORTH CAROLINA	
F. STATE-COLLECTED LOCAL TAXES: BASIS OF DISTRIBUTION	
G. DESIGN STANDARDS EXAMPLE	I

- H. DESIGN STANDARDS EXAMPLE 2
- I. FUNDING OPTIONS FOR GREENWAYS
- J. REFERENCES

#### LIST OF FIGURES

- FIGURE #1.....CONTEXT MAP
- FIGURE #2.....EXISTING LAND USE MAP
- FIGURE #3....AERIAL MAP
- FIGURE #4....TRENDLINE MAP
- FIGURE #5.....STEEP SLOPE MAP
- FIGURE #6.....PLANNING AREA PLAN MAP
- FIGURE #7.....PROPOSED TOWN-WIDE PLAN MAP
- FIGURE #8A...CLAYBROOK CONVENTIONAL SUBDIVISION DESIGN SCENARIO
- FIGURE #8B...CLAYBROOK CONSERVATION DESIGN SCENARIO
- FIGURE #8C...CLAYBROOK CLUSTER DESIGN SCENARIO
- FIGURE #9.....BASEBALL FIELD DESIGN SCENARIO
- FIGURE #10....TOWN CENTER DESIGN SCENARIO
- FIGURE #11....ASSEMBLY DRIVE CIRCULATION IMPROVEMENTS

## ACKNOWLEDGEMENTS

The Town of Montreat's Comprehensive Plan was developed through a process initiated by the Town of Montreat and its staff and facilitated by LandDesign, Inc. and The Walter Fields Group. This document represents the efforts of the Comprehensive Plan Steering Committee that guided the planning process and should be recognized not only for the effort expended, but also for its continued commitment to the Comprehensive Plan. The following were members of the Comprehensive Plan Steering Committee:

*Matt Ashley, Chair*

*George Barber*

*Bob Headley*

*Bill Hollins*

*Don Reid*

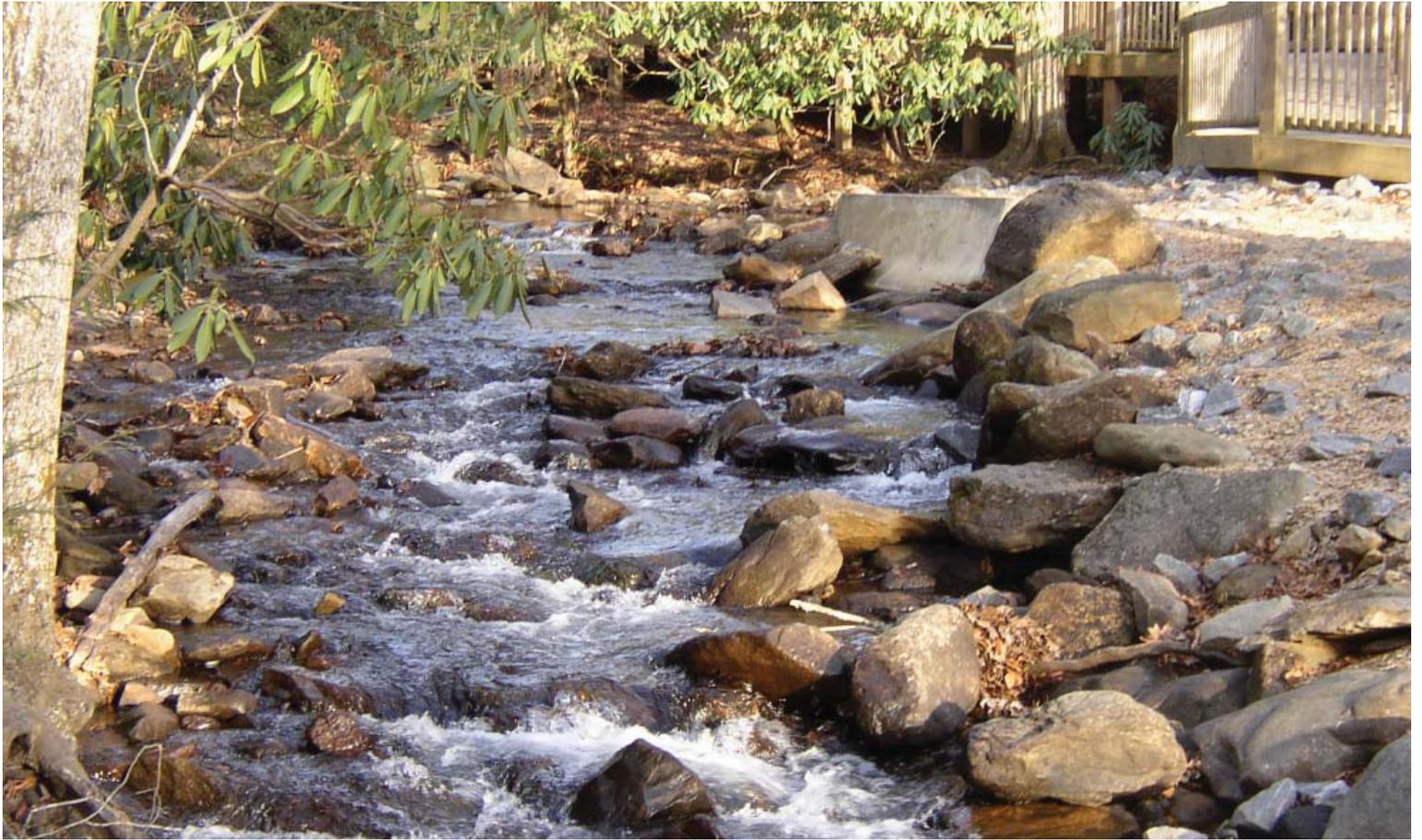
*Linda Stroupe*

*Dan Struble*

*Nancy Hope*

*Ron Nalley, Town Administrator*

Members of this committee have come from diverse points of view, but their differing ideas and opinions served as a starting point for creative discussion and debate. Each of these individuals share a common vision for Montreat and their input is greatly appreciated and acknowledged. Many other groups and individuals contributed to the development of the Comprehensive Plan. Stakeholders interviewed during the process represented members from various institutions, organizations, committees, boards, and staff. (A complete list of stakeholders who were interviewed may be found in Appendix C). Interested citizens and property owners participated in a community survey, as well as a series of community meetings and workshops. Their efforts are also reflected in this plan. These groups and individuals are gratefully acknowledged for their invaluable contributions through their participation, their energy, and their passion.



## CHAPTER I: INTRODUCTION

### I.1 CONTEXT

### I.2 PURPOSE OF THE PLAN

### I.3 PROCESS TO DEVELOP THE PLAN

### I.4 PLANNING AREA

### I.5 ORGANIZATION OF THE PLAN

### I.6 KEY TERMINOLOGY

## I.0 INTRODUCTION

# I.0 INTRODUCTION

## I.1 CONTEXT

Montreat is situated in the Appalachian Mountains approximately 15 miles east of Asheville, North Carolina. Founded as a spiritual retreat by Presbyterians, Montreat dates to 1897 when John Collins, a congregational minister from New Haven, Connecticut, and others arrived. Later, the Mountain Retreat Association (MRA) was established by church leaders. Today, the charming Town of Montreat has a population of 690 people who live on 1,756 acres, of which more than 60% is in conservation easement. Home to Montreat College as well as the MRA, the town is known for its long history as a Presbyterian retreat and is appreciated for the qualities that contribute to its unique character: its natural setting, the small-town feel of its built environment, and its people. More about Montreat's origins and history may be found in the Montreat Today section of this plan.

## I.2 PURPOSE OF THE PLAN

Adopting the comprehensive plan is one step toward ensuring that new development and the infrastructure and services that accompany it help Montreat remain a tranquil town, while much of the natural environment remains intact. Such a plan is a reflection of the community's desires and serves as a policy guide that will aid decision makers over the coming years. In order to be an effective guide, the plan must be comprehensive in the sense that it examines a number of key, interrelated factors simultaneously. More importantly, it is strategic, identifying the most critical issues and defining short and long-term strategies for addressing those issues. Comprehensive plans are the most common type of plans used to guide development. It is a means of establishing a long-term vision typically looking 15 to 20 years into the future and is meant to be updated not less than every five years.

## I.3 PROCESS TO DEVELOP THE PLAN

The development of this Comprehensive Plan for the Town of Montreat took approximately 12 months. The steps involved include research and analysis, and synthesis of information pertaining to a variety of planning elements; meeting with Montreat representatives and others involved in the planning process; facilitation of a series of public meetings; preparing a conceptual plan for review by the town; and, based on this collective information and input, preparing and finalizing the Comprehensive Plan. The recommendations and implementation strategies identified provide a starting point for the implementation process. Two very important aspects of this process were building on previous work and involving the community.

## PREVIOUS WORK

The project initiation began with visits to the study area, a kick-off meeting and collection of geographic and other data. The team reviewed existing local plans, studies and regulations and used GIS data from Buncombe County to further the team's understanding of the area. Research and analysis of these plans, studies and data include, but are not limited to, the following:

- Comprehensive Plan Alternatives For Montreat, North Carolina (2003)
- Montreat Conservation Easement
- Montreat Wilderness Conservation Plan
- A Study and Zoning Plan For a Proposed Area of Extraterritorial Planning and Regulation of Development By The Town of Montreat, North Carolina (1992)
- Subdivision Ordinance For the Town of Montreat (Adopted 2000)
- Final Recommendations of The Montreat Tomorrow Committee (1984)
- Report to the Town Council of the Second Montreat Tomorrow Committee (1996)
- Zoning Ordinance For the Town of Montreat, North Carolina (Revised 2005)
- Parking and Traffic Analysis For the Town of Montreat (1982)
- Town-wide Roadway Evaluation and Parking Study (2000)
- Town of Montreat Capital Improvement Program Fiscal Years 2006-2011
- Flood Damage Prevention Ordinance (2005)
- Phase II Stormwater Ordinance For Montreat, North Carolina (2006)



The signature entrance to Montreat welcomes residents and visitors to town.

### *Montreat's Vision*

*“To seek ways to maintain and improve the quality of life, preserve the natural beauty and promote responsible growth while maintaining our community image, heritage and traditions.”*

Previous planning efforts produced similar plans, such as the Town of Montreat Land Use Plan (1985), which provided specific recommendations regarding a future land use pattern for the town. In addition, Comprehensive Plan Alternatives (2003) was prepared by the UNC Department of City and Regional Planning as a way of helping the town understand various plan alternatives. These plans and studies were among the many documents reviewed in the initial stages of this process to bring forward the ideas that are still relevant today.

### COMMUNITY INVOLVEMENT

Community involvement included the formation of a Comprehensive Plan Steering Committee (CPSC), a series of interviews with key stakeholders, public meetings with members of the community, a day-long planning charrette with the CPSC and stakeholders and a community survey.

The CPSC was selected from a cross-section of people from the community to guide the process and provide valuable input at critical points during the process. The members of the Steering Committee are listed on the Acknowledgements page following the table of contents and list of figures near the beginning of this document.

A community survey was conducted to reach out to all residents, particularly out-of-town property owners, to gather feedback. Of 728 surveys sent out, 373 were returned, a remarkable response rate of 51%. The results of the survey appear in Appendix B.

The survey was vital to create a refined set of issues and opportunities that was then presented during the first community meeting on October 13, 2006. Meeting attendees were involved in an exercise to prioritize these issues. The purpose of this exercise was to determine issues most important to the community. A quick review of the results of this exercise shows that the community's top issues are preservation of the town's character, management of growth and tax base and revenue sources. These issues are discussed in more detail later in this report.

ISSUES*	GREEN**	RED**	TOTAL
Growth	45	16	77
Impact of Montreat College & MRA	30	7	44
<i>Our Impact on MRA &amp; College</i>	2	0	2
Housing	4	1	6
Lack of Commercial Services	1	0	1
Preservation of Character	27	60	147
Scenic Ridge Protection	8	0	8
Roads	13	5	23
Poor Walkability	9	0	9
Parking	6	1	8
Stormwater Runoff	6	1	8
Water Supply	28	1	30
Tax Base & Revenue Sources	38	14	66
<i>Forest Fire</i>	2	1	4
<i>Housing for Missionaries</i>	2	1	4
<i>Property Tax Increases</i>	2	2	6

\* *Italicized issues were identified by community members during the first community meeting.*

\*\* *Each participant was given two green dots and one red dot. They were asked to identify their top three issues they believe the Comprehensive Plan should address by placing a red dot on the most important issue and green dots on the two next important issues. The responses were weighted, scoring two points for each red dot, one for each green dot.*

A one-day charrette was conducted on December 1, 2006 with the Steering Committee, Planning Board members and Town Commissioners to discuss the conceptual plan, which highlighted areas of change. This was further refined and presented to the community during the second community meeting on January 2, 2007. Feedback from the community was then woven into the process to create a draft plan, which was presented to the community during the third community meeting on the March 16, 2007.

The whole process of collecting information was aided by a variety of stakeholders who were interviewed over four days in late 2006 and early 2007. These individuals, selected because they are involved on a day-to-day basis with the issues affecting Montreat, were asked to share their insight into the issues and opportunities present in Montreat. A list of community stakeholders and the organizations and institutions of which they are affiliated is located in Appendix C. From these cumulative sources, an inventory of issues was clarified.

## 1.4 PLANNING AREA

The study area, or “planning area,” is defined as the area within the Town of Montreat’s town limits as well as areas within its extra-territorial jurisdiction (ETJ) in which the town can exercise its planning and zoning authority. The ETJ encompasses an area within a 2,451-acre conservation easement, the land 500 feet beyond its treasured ridgelines and two properties held in private ownership: the large parcel owned by the Billy Graham Evangelical Association and Camp Merri-Mac. (See Figure #1). Unlike the land held in conservation easement and the protected ridgelines, these two large properties on the town’s western edge are significant areas where future development may occur or be accommodated, including residential and some institutional uses. Inclusion of the ETJ allows the study to focus not just on the town itself, but the surrounding lands that, if developed, could directly or indirectly affect the future of Montreat in some capacity, potentially altering the character of the town and the quality of life its residents enjoy.



TOP TWO IMAGES: The Comprehensive Plan Steering Committee was instrumental in creating a vision for the future of Montreat. BOTTOM: Continual input from the Montreat community guided the plan process from beginning to end.

## 1.5 ORGANIZATION

The plan is organized into three main sections - Introduction, Montreat Today, and Montreat Tomorrow. Specific elements of the plan are discussed in both the Montreat Today and Montreat Tomorrow sections. Montreat Today outlines the range of issues and opportunities for each topic based on the initial research analysis and feedback from stakeholders, steering committee members, and the community. Montreat Tomorrow describes the final Comprehensive Plan and includes all of the supporting illustrations and design scenarios, which are accompanied by detailed descriptions of each area. The latter portion of Montreat Tomorrow is devoted to recommendations and implementation strategies. Provided at the end of this document is an appendix, which includes information that has been referenced in the plan, such as the 2006 Community Survey and the list of stakeholders interviewed.

## 1.6 KEY TERMINOLOGY

To better understand this report, it is necessary to understand the terminology with which it is written. Although the following terms have been further expanded upon in the entirety of this report, each has been identified and briefly summarized for the reader's comprehension:

- **Comprehensive Plan Steering Committee:** Also referred to as the 'CPSC' or the 'Steering Committee,' this group was comprised of citizens and property owners representing a broad cross-section of the Montreat community and guided the comprehensive plan process.
- **Stakeholders:** A variety of land owners, agency and institution representatives, town staff, committee members, and others from Montreat who were able to enhance the research by providing insight and an additional layer of information regarding local issues and opportunities.
- **2006 Community Survey:** A survey that was conducted in conjunction with this comprehensive planning process to gain knowledge of the community's attitudes toward growth and development within Montreat.
- **Design Scenarios:** A method used to communicate the spirit of the comprehensive plan by illustrating the results of putting the policies into action. (Three design scenarios were completed and can be found in Montreat Tomorrow).
- **Extra-Territorial Jurisdiction:** Also referred to as ETJ, it is the legal ability of a local unit of government to exercise planning and zoning authority beyond its municipal boundaries. This permits governing bodies to make certain decisions about land development beyond the corporate limits.
- **Goals:** Value-based statements that are not necessarily measurable. For the purposes of this plan, they express an ideal future condition.
- **Recommendations:** A general course of action intended to achieve a stated goal.
- **Strategy:** A specific action employed by those involved in the implementation of the plan. Each strategy is related to the recommendation it follows.
- **Undeveloped Land:** Land in its natural state before development.
- **Protected Land:** Land that has been protected from future development

through a mechanism that takes away existing and potential development rights.

- Conservation Subdivision Design: A type of subdivision design that devotes a large percentage (locally-defined, not prescribed) of land area within a residential development to permanent open space.
- Dwelling Units per Acre (DUA): The number of residential housing units per acre of land.
- Shared Equity Homeownership (SEH): An approach to achieve affordable homeownership where a state or local government provides funding to help an individual purchase a home. In return for this public investment, the government entity shares in the benefits of any home price appreciation which may occur. The public's share of the home's appreciation may be used in two ways; it can either be returned to the government in the form of a cash payment that may then be used to help another home purchaser, or it can stay with the home, reducing the cost of the resale of that home to the next buyer.
- Table-Top Parking: Parking that takes advantage of the slope in such a way that it allows for two levels of parking, one above the other but each accessible via an at-grade driveway.
- Accessory Dwelling Unit (ADU): A dwelling unit either attached to a single-family principal dwelling or located on the same lot and having an independent means of access, such as a "granny flat," for example. ADUs differ from accessory apartments in that, if permitted by local ordinance, it has a separate means of access and can be a separate structure on the lot.

INSERT:

FIGURE # 1: *CONTEXT MAP*



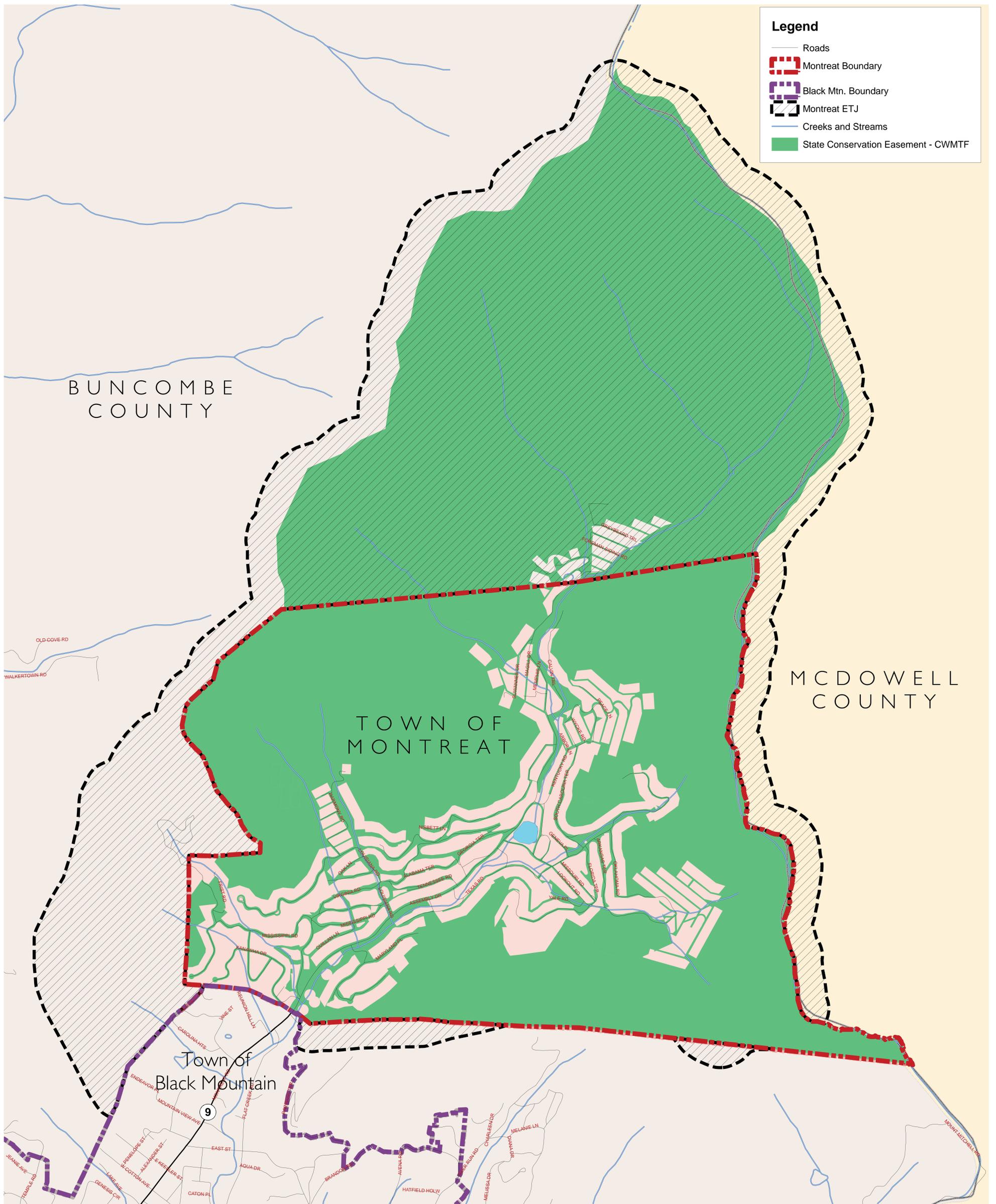


Figure #1  
Context Map  
Comprehensive Plan  
Town of Montreat, NC

Source: Buncombe County GIS, North Carolina Department of Transportation (NCDOT) GIS, North Carolina Center for Geographic Information and Analysis (NCCGIA)

Disclaimer: This GIS Data is deemed reliable but provided "as is" without warranty of any representation of accuracy, timeliness, reliability or completeness. This map document does not represent a legal survey of the land and is for graphical purposes only. Use of this Data for any purpose should be with acknowledgment of the limitations of the Data, including the fact that the Data is dynamic and is in a constant state of maintenance, correction, and update.



0 250 500 1,000 1,500 2,000 Feet



## CHAPTER 2: MONTREAT TODAY

- 2.1 CHARACTER & DESIGN
- 2.2 MANAGEMENT OF GROWTH
- 2.3 TAX BASE & REVENUE SOURCES
- 2.4 IMPACT OF MRA & COLLEGE
  - 2.5 HOUSING
  - 2.6 COMMERCIAL SERVICES
- 2.7 TRAFFIC & CIRCULATION
  - 2.8 INFRASTRUCTURE

2.0 MONTREAT  
TODAY

## 2.0 MONTREAT TODAY

As written in the MRA's original charter, the organization was established in 1897 for the purposes of "establishing and maintaining a municipality containing assembly grounds for encouragement of Christian work and history." In 1907, the MRA courted the Presbyterian Church USA General Assembly to endorse a plan that would secure the affiliation of Montreat and the Presbyterian Church USA. Subsequently, the Trustees of the MRA gained control of Montreat. Dr. Robert C. Anderson and others shared the vision that modern Montreat has become. The MRA has become one of the three national conference centers operated by the Presbyterian Church USA. The MRA offers a year-round schedule of conferences and retreats. It operates the 2,000-seat Anderson Auditorium and various lodging facilities such as the Assembly Inn, Windsboro and many cottages. Together, these lodging facilities provide approximately 500 beds. MRA activities include programs on environmental education, camps and clubs for hiking, overnight camping, swimming, and boating among others. Meals, an annual patron's fund, donations and supportive programs financially support the MRA.

Early basic municipal services were provided by the MRA, but when the Town of Montreat incorporated in 1967, it took over those services. The government operates under a mayor-council form of government, composed of a mayor and five commissioners. Government is responsible for providing services to the town, overseeing daily operations and evaluating future planning needs. Specifically, the town offers services such as water, police protection, street maintenance, and sanitation. Sewer service is provided by the Metropolitan Sewerage District (MSD). Fire protection is provided by the Town of Black Mountain. Schools are under the jurisdiction of Buncombe County. Today, the town's government operates on a limited annual budget of \$1,828,800, derived mostly from property taxes and shared revenue from the state.

According to its Web site, today's Montreat College germinated from an idea of Normal School during the early years of the MRA. The school's first session began in October 1916 with eight students. During its initial years, the school prepared young women to become teachers. It expanded its academic offerings to a four-year degree program in 1945. In 1956, the college restructured as a co-educational junior college, renamed as Montreat-Anderson, remaining associated with the MRA until 1975. In 1986, the school again became a four-year baccalaureate college, catering to the demands and circumstances of higher education. It changed its name to Montreat College in 1995. The college integrates faith and learning with a focus across the spectrum of liberal arts and pre-professional higher education.

Montreat College is a major employer in the Town of Montreat. Additionally, the college attracts residents, visitors and students to special events such as a variety of musical and theater performances, athletic competitions, prominent speakers, visual art displays, adult learning programs, worship activities and educational trips abroad. In addition, the college's library serves as the community's library with resources ranging from children's books through research materials rivaling those of a much larger university. Montreat College reaches out to communities beyond Montreat's town limits with satellite campuses in Asheville and Charlotte, North Carolina. In addition, the college recruits and attracts students from across the nation and around the world. Out-of-state enrollment comprises 40% of the student body, and students from 26 states and 10 countries attend the school. With an eye to the future, Montreat College has developed its own strategic plan. The college plans expansion in Black Mountain where it owns property and has plans to build additional academic buildings and recreational facilities. Ultimately, the goal is for student enrollment of 1,200 within its Montreat/Black Mountain Campus.

### 2.1 CHARACTER & DESIGN

Montreat's character is defined by its natural and built form, its citizens, as well as its unique spirit. Montreat is a town secluded unto itself as it is surrounded by pristine mountains and wilderness.

What is the Montreat character? For many residents and visitors it is defined by the spiritual connection they experience through their faith. For others, it is Montreat's beautiful natural setting among mountains and lush green vegetation, scenic ridges and tranquil vistas. There are those who appreciate Montreat's small-town charm, its physical appearance and architecture, its historic buildings, and social character. Community desire expressed during stakeholder meetings sustains these opinions, none more than the desire to maintain the spiritual experience of Montreat. An overwhelming 91% of respondents believe the town's spiritual history is the foundation of the community and should be preserved. Three-quarters

said they want Montreat to remain unchanged as much as possible in the next 20 years. Such responses are deeply rooted in the experiences residents and visitors have during their time in Montreat. To preserve this unique experience is to preserve the character of Montreat, defined by the town's natural setting, the history of its built form, and its people.

## NATURAL SETTING

Located in the southern Appalachian's Blue Ridge Mountains, Montreat's natural setting is striking. Key ingredients that define the natural setting of the town are its mountains and ridges, creeks and streams, and natural habitats.

### A. Mountains & Ridges

The town core is surrounded by beautiful mountains and scenic ridges. With names and histories of their own prior to the founding of Montreat, these remarkable hilltops were standardized by name by the federal government in the 1930s. Greybeard Mountain, Lookout Mountain, and Brushy Knob gracefully rise above Montreat. The naming of these mountains and how they are tied to local history makes them part of a collective experience that has transcended through various generations. Most of these mountaintops are accessible via a network of wilderness trails that were built by volunteers of the Mountain Retreat Association. They are currently maintained by volunteers of the MRA Wilderness Committee, the Cottager's Wilderness Committee, and the Town of Montreat Parks and Recreation Committee. Today, over 28 miles of trails are enjoyed by hikers and those who seek beauty and inner renewal. There has been a sense of stewardship and a desire to preserve the land by town residents, the MRA, and volunteers, as well the users of this wilderness area. This lasting stewardship has kept the area in its natural state for more than a century.

Montreat has recognized the ridgelines as a valuable aspect of the town and has taken measures to ensure the visual link to the surrounding environment is preserved. The town's Ridgeline Protection Overlay District enforces regulations to ensure the view. The overlay district, designed while the State of North Carolina enacted the North Carolina Mountain Ridge Protection Act, reinforces the visual connection. Further, the town established an Extra-Territorial Jurisdiction (ETJ). With the corresponding conservation easement established by the MRA, the ETJ extends "500 feet on all sides of the summit of certain ridges." The regulation will not only preserve ridges within the town's jurisdiction, but beyond. The purpose of the district is to "protect sensitive woodlands on the ridge tops in and around the Flat Creek Basin which contains the Town of Montreat."



Among Montreat's most valued characteristics is its natural setting. The mountains and ridges that surround Montreat to the west, east, and north provide it serenity and peace. Views to these areas are valued and protected through conservation easement and ridgeline protection overlay districts.

Other regulations do not specifically protect the ridgelines, but protect viewsheds to the ridgelines. As set forth in the town's zoning regulations, maximum building heights range from 35 feet to 40 feet for residential uses and 40 feet to 60 feet for institutional uses. While these restrictions need to be re-evaluated, height limitations on buildings prevent future obstruction of viewsheds and maintain the current visual connection to the natural environment.

**B. Creeks & Streams**

A web of creeks and streams permeates the landscape, performing the environmental function of drainage, but also creating an ambiance that reinforces the spiritual nature of the place. The largest stream, Flat Creek, runs north to south through the town's core along Assembly Drive. Flat Creek's ever-flowing waters are faithfully fed by Slaty Branch, Big Piney Branch, Kitchen Branch, and Puncheon Branch. The water of these streams backs-up behind a dam constructed in 1926 on Flat Creek to form the town's Lake Susan. Recent development in Montreat has created run-off into these creeks and streams, and erosion is a concern. The town is currently mapping the floodplain and floodways of major creeks and green space, defining areas where development might be further regulated to help preserve land along the waterways.



ABOVE:As rain and freshwater from the mountains flow down and through the town, creeks and streams serve as conduit that controls the watershed. Montreat has carefully developed around these areas to prevent contamination and disturbance of its creeks and streams.

**C. Natural Habitats (Vegetation & Wildlife)**

Lush green vegetation consisting of many native species of plants dot the wilderness area and the core of Montreat. Preservation of native plant species and natural wildlife habitats is one of the issues identified during stakeholder meetings. In fact, preservation of this remarkable area is so important that the National Wildlife Federation has designated Montreat's wilderness area North Carolina's first Community Wildlife Habitat. Surrounding the town is natural habitat of the black bear and other wildlife, which poses safety issues for the users of wilderness trails, as it does for animals as well. Native plant species, such as Carolina and Eastern Hemlock, have also become endangered due to the continued spread of a non-native insect, the Hemlock Woolly Adelgid.

**D. Conservation Easement**

Furthermore, a large percentage of Montreat's land, public and private, has been preserved by residents and groups through conservation easements. This benefits vantage points from within the town as the land protected by conservation easements limits the obstruction of viewsheds to the ridgelines.

Montreat's extensive conservation easement has limited the future development to some extent, and has potential to spur redevelopment activity. Given the small, fixed number of lots available for development and continued growth in Montreat, the redevelopment and expansion of existing units could create larger housing units than what currently exists in the town. This has the potential to alter, if not obstruct, the views of the mountains and their ridgelines. Currently, Montreat lacks regulations other than height restrictions to limit building scale. However, 85% of residents surveyed agree that new development and redevelopment should have limited impact on viewsheds.



ABOVE: Preservation of views to Montreat's mountains and hillsides is a primary concern of the town's residents. Breathtaking views such as this have been enjoyed by Montreat's citizens for generations. The conservation easement protects this land from development as owners of the land have placed it into a trust for future protection.

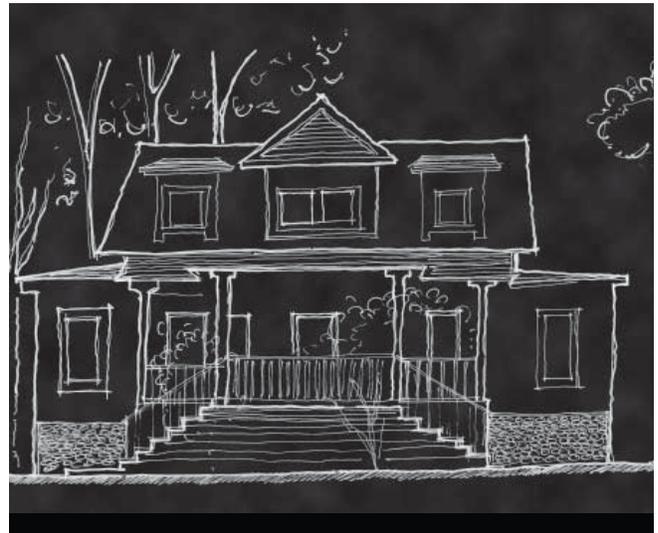
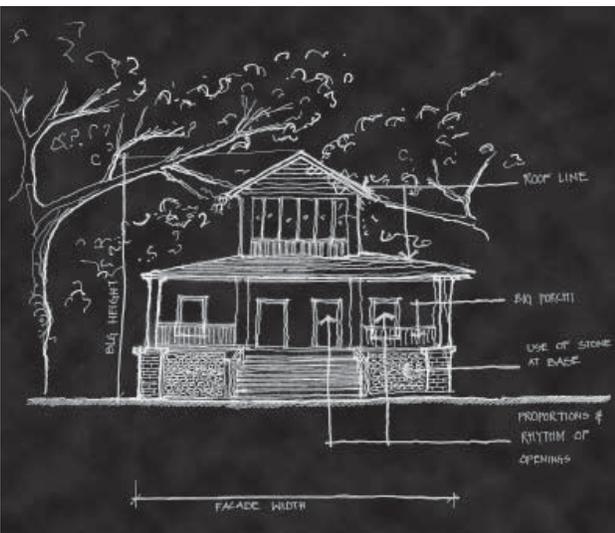
## BUILT FORM

The built environment of Montreat is deeply rooted in its history. The stone archway gate at the entrance of the town gives the visitor first glimpse of the historic built fabric. Prominent buildings such as Assembly Inn, buildings on the Montreat College campus, and cottages further reinforce this historic character. More than half of Montreat’s housing stock is historic. In fact, much of Montreat’s historic residential construction was completed during the town’s first 20 years, with half of homes built prior to 1951.

The uniform style of architecture of key MRA buildings such as Assembly Inn and Anderson Auditorium, and Montreat College, along with the cottage-style residential architecture unique to Montreat, reinforces a common architectural vocabulary that complements the beautiful natural setting. The use of stone as construction material for prominent buildings such as Assembly Inn, Anderson Auditorium and Howerton Hall reinforces the style of built form unique to Montreat. Today, Montreat’s historical appearance is in flux. New construction and residential renovations are not in the same scale or size of the familiar Montreat cottages.



Houses built on hillsides and stone construction are characteristic of the residential structures in Montreat.



Architectural characteristics are highlighted in these sketches to pinpoint a few of the elements that contribute to Montreat’s style.



Assembly Inn is one of Montreat's signature buildings. Located within the Town Center, it can be seen from across Lake Susan for a picturesque view.

## 2.2 MANAGEMENT OF GROWTH

Montreat is a unique community in that typical growth and planning models simply do not apply. While it is possible to gather data on traditional planning parameters, as was admirably done in the 2003 document entitled “Comprehensive Plan Alternatives for Montreat, North Carolina,” these data alone do not begin to paint a picture of the future. A community survey conducted in the initial data and opinion gathering process revealed preferences to maintain the community’s historical characteristics but does not answer the many conflicting questions tying the town’s past to its future. Of critical importance is how the town intends to grow and what types of uses it will, or will not, accommodate. See Figure #2, the Existing Land Use Map.

Montreat cannot grow in the traditional sense. The physical limits of the community are reasonably fixed. Bounded almost completely by a conservation easement and the Town of Black Mountain, the prospect for expansion through annexation is limited. With any such growth, the town would struggle to pay for required services in newly annexed areas. In fact, annexation could dilute the effectiveness of service delivery within the existing town limits.

Approximately 75% (or 63% not including roads and rights-of-way) of the town is restricted from development. Areas of town in permanent conservation, including open space, roads and rights-of-way, are perceived as valuable by town residents and visitors, but do not contribute to the tax base.

Significant portions of the town are already developed predominately for residential use. These areas are reflected on Figure #2, the Existing Land Use Map.

Much of the remaining areas has been subdivided, but what will be developed is unclear. Assuming all parcels can be developed, the Land Use Map might look something like the Trendline Map, Figure #4. Although there seems to be some uncertainty as to the actual number of vacant lots left to develop, it is certain that developing many of these lots would be very challenging, if not impractical, due to the steep terrain (See Figure #5, the Steep Slope Map). Street access and extension of utilities to new development would be difficult and expensive in some places. In addition, construction of roads to provide access to some lots could be potentially disruptive to the natural vegetation.

Further, growth pressures exist. As residential development increases the population grows. As Montreat College adds students, the demand for campus expansion grows. As the MRA continues to refine programs to attract and retain visitors over a longer season, the number of seasonal visitors grows. These guests seek Montreat’s quiet solitude and natural beauty, yet their extended stays further impacts the character of the town. Growth impacts the community in predictable ways- increased traffic, and increased demands for town services. Growth in any form will increase the pressure on the quality of life in Montreat.

Just outside the town’s corporate limits but inside the town’s ETJ, the Billy Graham Evangelical Association (BGEA) owns 147 acres on the southwest side of Montreat. Currently, the association’s property is only accessed through the town and may one day present an opportunity to develop the site in the same character as Montreat.

Of the remaining areas, significant portions of the town are devoted to the facilities of the Mountain Retreat Association (MRA) and to Montreat College. Chartered before the turn of the last century to essentially function as would a municipality, the MRA constructed streets, a water system, a sewer system, and recreational facilities. These facilities are now, by and large, the responsibility of the Town of Montreat. Sewer is provided by the Metropolitan Sewerage District and, while the town has many facilities within its jurisdiction, Montreat does not own nor maintain any recreational facilities.

## 2.3 TAX BASE & REVENUE SOURCES

As discussed in the previous sections, Montreat lacks the usual mix of land uses that provide a balanced tax base. It is not unusual to find communities with large areas of tax-exempt property. Many mountain-area governments deal with a similar problem due to the locations of state and national parks and forests. However, Montreat’s extremely large percentage of the community to be in a tax-exempt status is a burden. Single-family homeowners and the owners of vacant lots are the only real source to generate most local revenue. The increase in property values that has occurred in recent years will add potential for the town to build its tax base but the burden is squarely upon the residents and non-resident owners. As Montreat grows, or

even if it doesn't, the costs of operating the town, maintaining streets and utilities, meeting the mandates of new rules such as those relating to water quality, and meeting the expectations of its citizens will continue to rise. New sources of revenue will need to be identified and fairly considered for use to meet the community's needs.

The Town of Montreat operates on a limited budget and, like most municipalities, is currently searching for methods to increase revenue. An improved revenue picture would allow the town more flexibility to meet its current and future needs. But Montreat, and all municipalities in North Carolina, have only the ability to raise revenue that is allowed by the General Assembly. These limits are further compounded in Montreat by the large amount of land and property that is 'not taxable' as it is owned by the MRA, Montreat College or other 'tax exempt' institutions. The town will need to be creative to find means to expand revenue to operate and provide services, traditional and newly imposed.

## 2.4 IMPACT OF MRA & COLLEGE

Prior to incorporation in 1967, the town of Montreat's services were provided by the MRA. Beyond being the center of activities, the MRA constructed and maintained roads and built the water system. Today, these burdens are shouldered by the town. The tax-exempt MRA is the town's largest land owner, hosts thousands of visitors annually and is a large consumer of services.

Citizens speak fondly of summers spent with family and friends in Montreat's Christian setting. Generations have come to Montreat over the years to learn and enjoy the fellowship developed by the MRA. Historically, it is the heart of the community. This tradition continues but in the context of modern times and pressures. The MRA is in the process of evaluating its own future course and the outcome of that evaluation will have implications for the town in terms of demands for services and the means to provide it.



Together, Montreat College and MRA are the largest land holders in Montreat.

For example, if the MRA expanded its traditional summer season to include programs in the spring and fall, there would likely be additional demands placed on the town's water system. Overlapping with the college's academic year could compound some traffic and parking problems. Similarly, competition for housing could force some students or conference attendees to seek housing elsewhere, even outside Montreat. Taken individually, these may seem like minor matters but collectively they could lead to significant disruptions in the life of the community. If the MRA plan also called for new construction or redevelopment of some of its existing properties, the community's appearance and quality of life could be affected. In a small town, even small decisions can have a large impact.

Montreat College also has plans to grow. Unlike the MRA, the college has the ability to expand its facilities outside of Montreat on land that it has been able to acquire. The long-term goal is to leave the main campus in its present location and to provide for other facilities off-site if needed. But this relies on the college's ability to be able to do some expansion of the main campus and/or its buildings to accommodate a larger student population and additional staff. Such expansion could impact nearby properties and bring additional housing demands to Montreat. According to the community survey, most respondents are not supportive of additional, higher density housing. College students could have a difficult time finding housing choices within the town, resulting in more traffic from commuting students who will also need additional parking.

With these issues outstanding, questions remain from conflicting community survey results. For example, while 42% of respondents thought the town should plan for and encourage the expansion of the MRA, only 34% thought the town should plan for and encourage the expansion of the college. Nearly half opposed additional student housing. Yet, no one would suggest that either of these institutions be prevented from growing and prospering. But as they grow and demands for services increase, how will the town afford the costs of new or expanded services? Revenue will be critical for the town.

## 2.5 HOUSING

Historically, the citizens of Montreat have discussed the need to do a better job with housing choices. This need is three-fold. First, Montreat was founded upon a number of principles and missions, among them the heartfelt desire that retired church workers, missionaries and ministers be able to afford to live in the town. While this mission has been repeated in various MRA reports and studies through the years, little has been done to address the need to build more types of housing that retired church workers can afford. Secondly, during the summer months the town has a substantial influx of visitors who come to Montreat to attend conferences and vacation with family. Montreat routinely has a shortage of housing to accommodate these visitors during the peak summer demand period. Lastly, any future expansion plans by Montreat College must come with new solutions to the problem of housing students.

Simultaneously, there are changing demands in Montreat brought about by increased single-family home construction, the growth of Montreat College and its plans for future growth, as well as the changing and expanding programs of the MRA. Yet, as evidenced by the results of the community survey, these changing market forces impacting Montreat and the historical mission to provide a variety of housing choices for retired church employees and ministers are of less concern. An overwhelming 77% of those surveyed oppose higher density housing, usually more affordable by nature. An even larger majority, 82%, oppose the construction of apartments to house MRA and college workers, volunteers, students and staff. While such significant opposition exists to higher density residential development, the survey reveals conflicting, nearly equally divergent opinions, in regard to housing. The survey indicates 46% agree on encouraging a mix of seasonal lodging for students, volunteers and staff, and 54% agree on encouraging a mix of permanent housing for retirees and ministers. Again, market forces are in play. Land and the cost of new homes in Montreat are steadily rising, pressuring the existing housing stock as well. Residential properties make up the only significant tax base in Montreat and the cost of future services will have to be balanced, at least in part, by property taxes. The cost to live in Montreat will be among the most discussed and perhaps contentious issues the community will face in coming years.



Montreat's land use is overwhelmingly single-family residential, such as this home typical of the Montreat style with its large porch, wide columns, stone foundation and pitched roof.



Housing is a primary land use in Montreat and is a major influence in the town's character. The town has become a popular location in the second home market, increasing home values.



Ten Thousand Villages is one of the few stores in Montreat.

## 2.6 COMMERCIAL SERVICES

Nearly totally reliant on property taxes, Montreat differs radically from other communities as it is almost completely absent of commercial and service uses. Most goods and services are supplied beyond the town's jurisdictional boundary in neighboring towns such as Black Mountain. The town lacks the benefit of commercial tax base to help provide the costs of municipal services, yet 80% of residents said in the community survey that they oppose commercial development.

However, in some of the latter community meetings, some residents stated that they were in favor of some services within the town (e.g., a café). At the initial community forums, general commentary reinforced the survey results, which revealed opposition to additional commercial services. Residents say they rely on nearby Black Mountain to provide their needs of daily life. Even the smallest need requires a vehicle trip out of town. The lack of retail and service uses, coupled with so much tax-exempt land and residential property, means future financial burdens will fall upon homeowners and owners of the limited amount of vacant land in town.



Roadways in Montreat provide views to serene landscapes and access to locations throughout the town.

## 2.7 TRAFFIC & CIRCULATION

The Town of Montreat is unique in its transportation infrastructure since it has only one way in and one way out of the community. Although a restrictive element from a transportation network perspective, the stone arches are an artful entry monument to the town. This poses a potential problem in the event of an emergency evacuation. Topography and the limited connectivity to areas outside of town complicate the challenge. The core of Montreat is accessed by Assembly Drive. It connects the town to NC 9 and the nearby community of Black Mountain. It also provides access to Interstate 40. Roads such as Louisiana Road, Virginia Road, Mississippi Road, Texas Road and Lookout Road connect residential areas to the town center. They are accessed from the main spine that is Assembly Drive. Based on the Town-Wide Roadway Evaluation and Parking Study conducted in 2000, the town maintains 14.96 miles of roadway within its limits. Most of the roads that provide access to higher elevations from the town center are winding roads with sharp turns. This challenges emergency vehicles and increases response times.

### VEHICULAR MOBILITY

#### A. Road Design & Construction

Although most of the roads within the town limits are considered to be safe, the road study of 2000 identified three intersections in need of improvement. Mississippi Road at Mecklenburg Circle, Mississippi Road at Virginia Road, and Kanawha Road at Mecklenburg Circle have problems in terms of sight distances, steep grades, or stop conditions.

Other roads, especially at higher altitudes, remain unpaved and make some travel challenging. Lookout Road is one such example. In eastern Montreat, beyond Oklahoma Road, streets exist only on paper due to the way some lots were platted. There is no allowance for topography along these ‘paper roads’ and may become a future issue if land owners attempt to develop these parcels.

The town currently has four one-way streets: portions of South Carolina Terrace, West Virginia Terrace, Texas Road and Gaither Circle. Vehicular circulation on these one-way streets works with few problems except on the portion of South Carolina Terrace during Sunday church activities when on-street parking makes circulation difficult. The same roadway study identified difficult travel where limited sight distance hinders drivers on narrow-width streets. The study recommended that West Virginia Terrace, Kentucky

Circle, Arkansas Trail, South Carolina Extension, Texas Road, Assembly Circle from Kentucky Road to Gaither Circle, and a portion of Virginia Road from Alabama Terrace to North Carolina Terrace be considered for one-way traffic flow. While these needs have been identified, the community survey showed more than half, 53%, of residents are opposed to spending additional tax dollars on roadway improvements. Another 25% of respondents were undecided or did not reply. Roads were cited as being among the top concerns, as evidenced by the results of the community survey and the October 13, 2006 community meeting.

#### B. Traffic

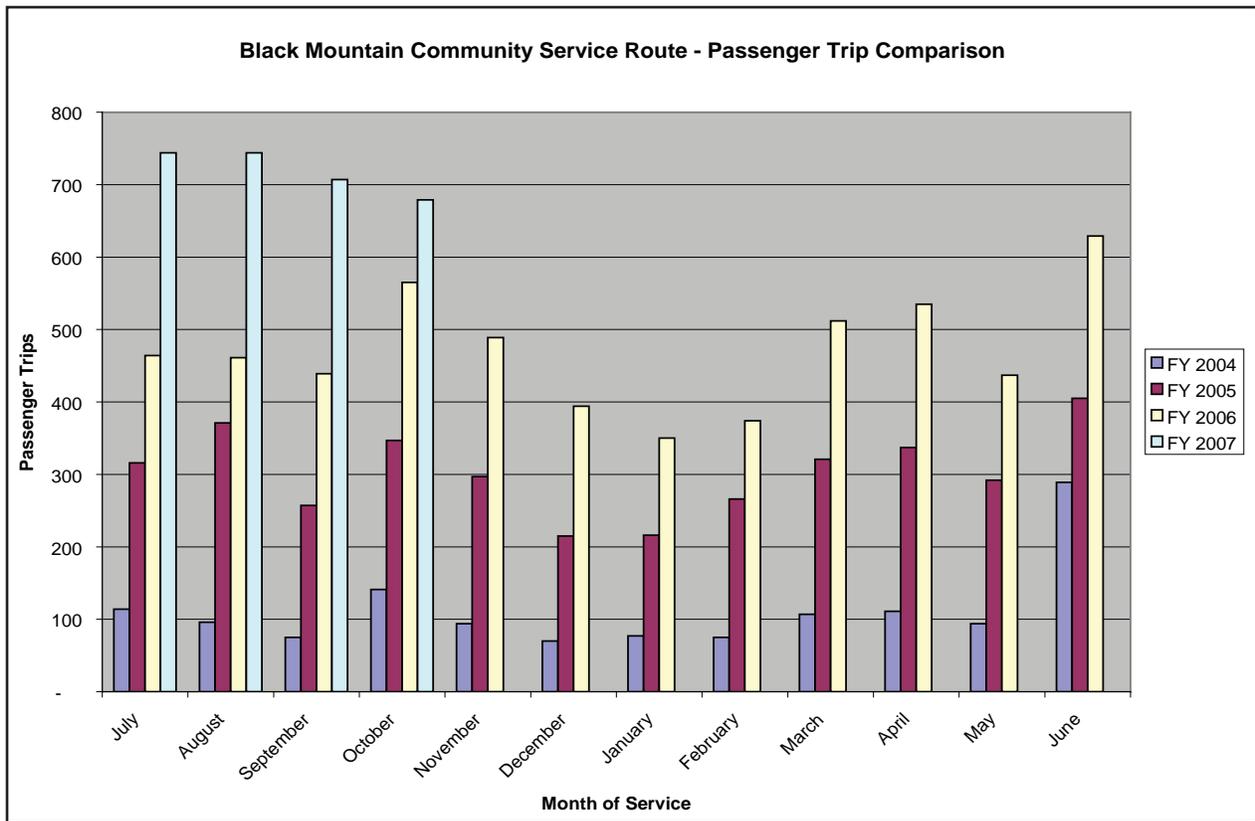
Only during peak summer weeks is traffic congestion an issue. Based on a North Carolina Department of Transportation traffic survey in 2004, the Average Annual Daily Traffic (AADT) count outside the town limits on NC 9 is 3,700 vehicle

trips per day. This number, although a good indicator of average traffic flow in and out of the town, does not reflect peak traffic volumes during summer months. The town has plans to conduct a traffic count during the summer of 2007 to assess peak season traffic volume. The study will give the town a better understanding of peak traffic conditions and how it affects mobility within the town during the summer months.

### C. Alternative Modes of Transportation

Transit service provided by Buncombe County, known as Mountain Mobility, connects Montreat to Black Mountain and Asheville. The maximum usage during the 2006 calendar year was in June when 629 passenger trips were made. This roughly corresponds with the peak periods for MRA activities and the fall opening of Montreat College.

A detailed breakdown of passenger trips from 2004 to date and projections for July, August, September and October of 2007, is shown below. A quick look at the chart reveals that the number of passenger trips has increased in recent years and that the demand for such service is at its peak between June and October.





LEFT: Pathways are important for pedestrian connection purposes. RIGHT: The Gate Trail, a narrow dirt path that opens at the town entrance, connects pedestrians to the town center. Existing pathways in Montreat need to be improved for the safety and circulation of pedestrians and bicyclists.

## NON-VEHICULAR MOBILITY

The scale of the town with its compact form and well-defined core lends itself to a very walkable environment. There are two kinds of walking pathways. First is the series of hiking trails that connect the town with the surrounding wilderness areas. Of these trails, Old Mitchell Toll Road Trail connects the entrance of Montreat to the Blue Ridge Parkway via Rainbow Mountain Trail. It is one of the longest trails in the town's vicinity. Greybeard Trail connects the town to the Greybeard Mountain. West Ridge Trail runs along the ridgeline northwest of the town and connects various unnamed peaks before ending at Big Slaty (False Greybeard). The second set of trails is the in-town trail network that provides connectivity within the town. One such trail is the Gate Trail. One may walk from town entrance to town core along Assembly Drive and Flat Creek on this trail, characterized by its very narrow dirt path.

Montreat is a safe place to walk and bicycle. 75% of survey respondents said they feel safe and comfortable walking in town. Although there are many long-distance hiking trails in the wilderness areas, and some opportunities for biking, the internal trail system is weak. It would benefit from greater connectivity to key destinations within Montreat. There is an identified need for a multi-use trail within the town core that could be used by different demographic groups for different purposes – jogging, walking, and biking. Such a system of trails would be especially useful for students who want to connect to various destinations and for visitors during summer months to walk from lodging to campsites. Lastly, there is a need to link pedestrian walkways to parking lots. The town's Park and Recreation Committee is looking into strengthening the internal trail system, as well as connecting trails to other communities, such as Black Mountain. That study will be further refined after this process.

During the stakeholder interview process town residents suggested that they prefer pathways and walkways to sidewalks. Organic pathways and walkways are found to be more in keeping with the character of Montreat. Over half of survey respondents, 58%, opposed the idea of the town building sidewalks. Nearly half of residents, 49%, said the town should build multi-purpose trails.

## PARKING

Parking, although sufficient during most of the year, becomes an issue during the peak summer season when 1,500 to 2,000 weekly visitors come to town. Among survey respondents, 70% agreed that the town needs additional parking during summer months to reduce pressure on the limited number of available parking spaces. A total of 461 parking spaces are scattered throughout the town (Comprehensive Plan Alternatives for Montreat, North Carolina, 2003). Currently, there is no charge or fee for student and visitor parking, although students are required to obtain a permit to park in campus parking lots. There is a nominal fine for parking violations. Additional parking is available near the town entrance by the stone gate, and these spaces are used heavily during the summer season.



Although parking presents a problem during peak demand periods, there is ample parking throughout non-peak demand periods. Parking needs to be organized more efficiently.

Many see off-site satellite parking as a potential solution to alleviate the seasonal problem. Among respondents, 52% agreed that satellite parking is needed for conference center visitors and students. Although there is a clear demand for parking, especially during peak season, 64% of survey respondents opposed the town exploring the need for a parking structure. More than half of respondents, 54%, said that parking management is more important than additional parking spaces.

## 2.8 INFRASTRUCTURE

Montreat's infrastructure consists of a water system and stormwater. Other services are provided by other parties. Development and redevelopment in Montreat presents problems for stormwater as steep slopes and disturbance of vegetation create soil erosion and allow chemicals to enter creeks and streams.

### STORMWATER

The important issue of stormwater is directly related to water quality and health. Run-off from impervious surfaces, such as streets, parking lots and rooftops, sends chemical pollutants, unwanted materials, and especially sediment directly into streams without filtration measurements through a water treatment facility. Sediment is particularly problematic.

Montreat's stormwater run-off is directly affected by the cleaning of and the loss of vegetation, impervious surfaces, hydrology, soil typology, and the steepness of slopes. The elimination of existing vegetation on hillsides during development exposes soils, allowing stormwater run-off to carry sediment into creeks and streams. Development on steep slopes exacerbates the problem in that the increased velocity of the stormwater run-off increases erosion. While much of Montreat is protected by a conservation easement, development and redevelopment remains a factor in erosion and stormwater management.

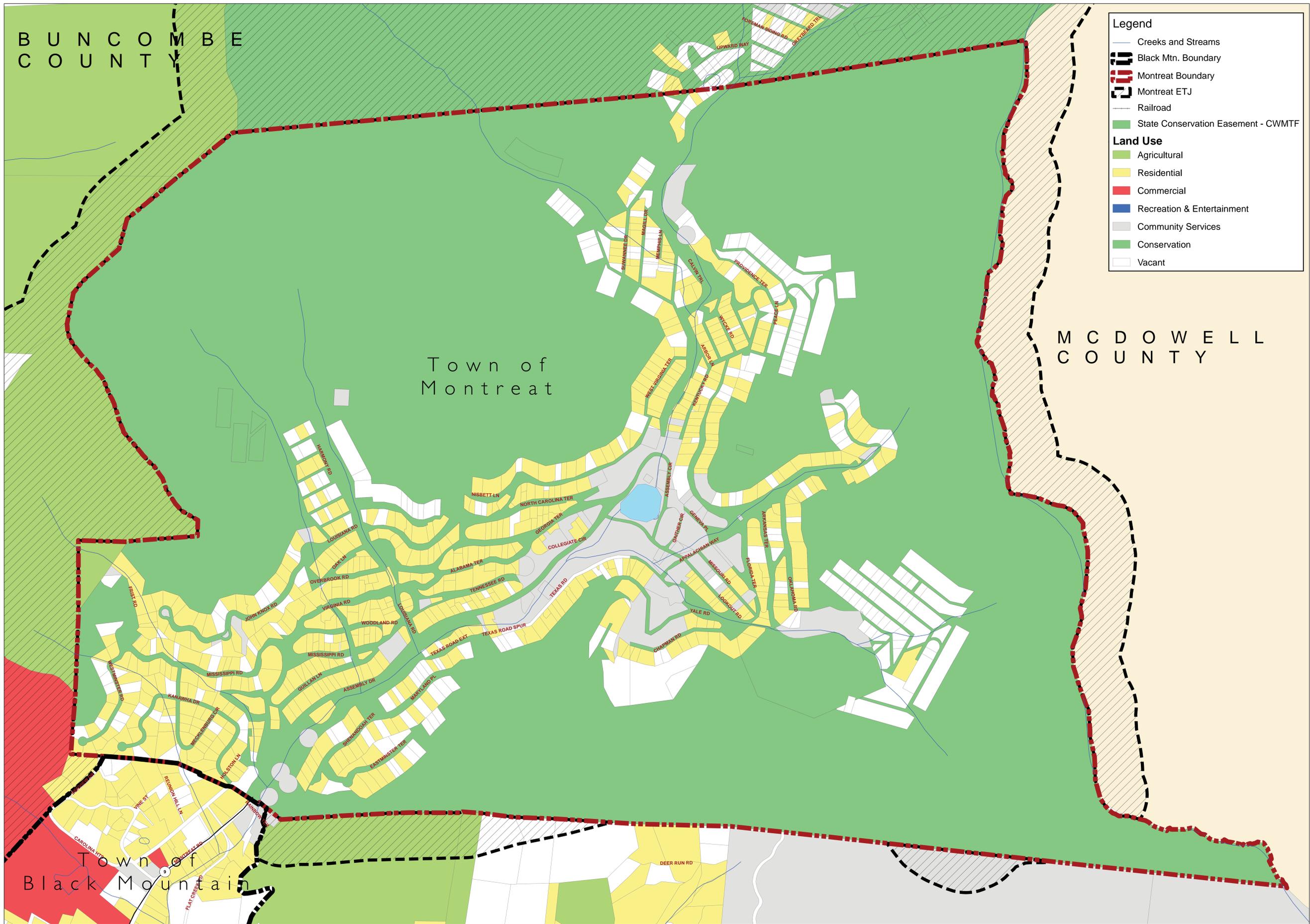
Montreat is greatly impacted by its amount of impervious surface areas (roadways, rooftops, parking facilities and other hard surfaces) where rainfall and run-off are unable to be absorbed into soils. According to Planning and Urban Design Standards, impervious surfaces "preclude the infiltration of precipitation into soils and can significantly reduce groundwater recharge, subsequently lowering the water table, depleting groundwater supplies, and reducing ecologically important base flow to streams and wetlands." With relatively few parking spaces and a limited number of new homes built annually, Montreat's ratio of pervious surface to impervious surface remains high compared to other towns.

Still, accepted practices for stormwater management continue, such as faithfully adhering to federal regulations, encouraging land conservation and implementing recently approved new regulations.

The Federal Clean Water Act requires communities to adhere to management principles for stormwater run-off and to control non-point source pollution. A specific requirement of this act, known as Phase II, is written for smaller cities and towns such as Montreat. Specifically, Montreat follows regulation requirements established by the National Pollutant Discharge Elimination System (NPDES) Phase II Stormwater Program. These regulations are established to control polluted run-off and thereby protect and improve water quality, safeguard human health, protect aquatic habitats and encourage stewardship and pollution prevention within Montreat. Requirements address public education, public involvement, illicit discharge detection and elimination, construction site run-off controls, post-construction site run-off controls, good housekeeping/pollution prevention and municipal facilities. The law requires Montreat to submit a plan and obtain a state permit to manage stormwater run-off, and to report regularly to the state about Montreat's adherence to the plan.

INSERT:

FIGURE # 2: EXISTING *LAND USE MAP*



**Legend**

- Creeks and Streams
- Black Mtn. Boundary
- Montreat Boundary
- Montreat ETJ
- Railroad
- State Conservation Easement - CWMTF

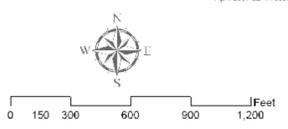
**Land Use**

- Agricultural
- Residential
- Commercial
- Recreation & Entertainment
- Community Services
- Conservation
- Vacant

**Figure #2**  
**Existing Land Use Map**  
 Comprehensive Plan  
 Town Of Montreat

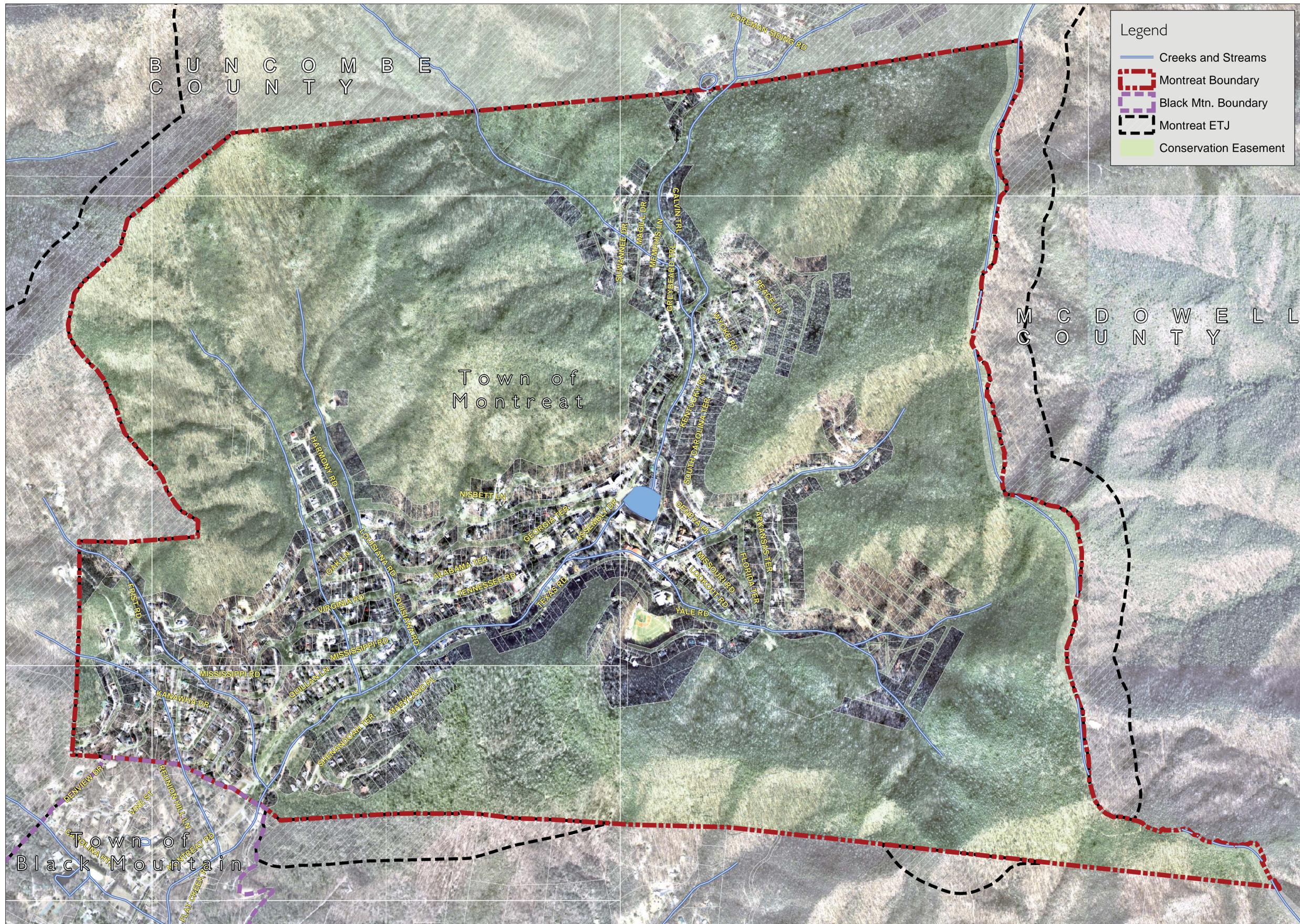
Source: Buncombe County GIS, North Carolina Department of Transportation (NCDOT) GIS, North Carolina Center for Geographic Information and Analysis (NCCGIA)

*Disclaimer: This GIS Data is deemed reliable but provided "as is" without warranty of any representation of accuracy, timeliness, reliability or completeness. This map document does not represent a legal survey of the land and is for graphical purposes only. Use of this Data for any purpose should be with acknowledgment of the limitations of the Data, including the fact that the Data is dynamic and is in a constant state of maintenance, correction, and update.*



INSERT:

FIGURE # 3: *AERIAL MAP*



Legend

-  Creeks and Streams
-  Montreat Boundary
-  Black Mtn. Boundary
-  Montreat ETJ
-  Conservation Easement

Figure #3  
 Aerial Map  
 Comprehensive Plan  
 Town Of Montreat

Source: Buncombe County GIS, North Carolina Department of Transportation (NCDOT) GIS, North Carolina Center for Geographic Information and Analysis (NCCGIA)

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FIGURE # 4: *TRENDLINE MAP*



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FIGURE # 5: *STEEP SLOPE MAP*

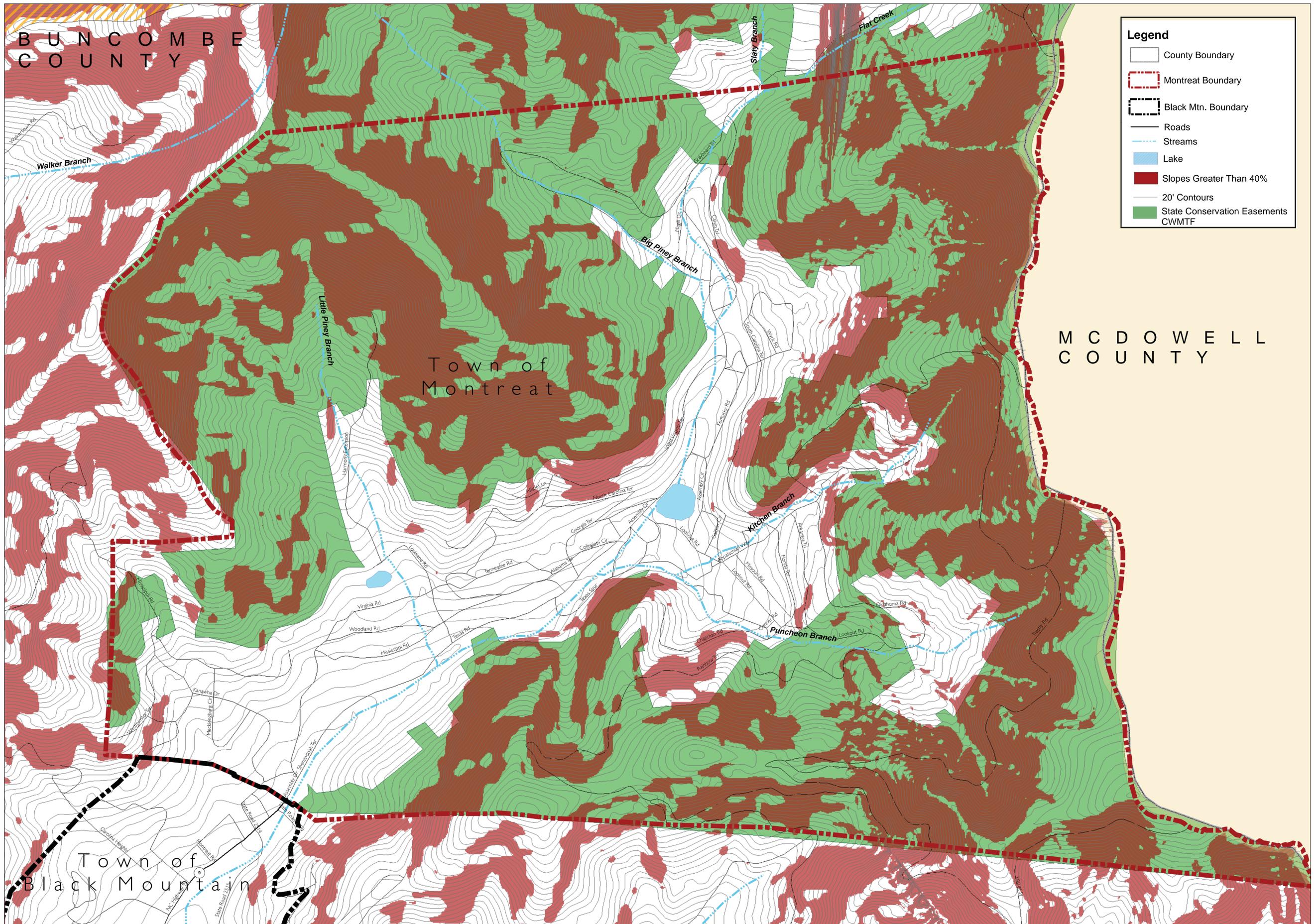
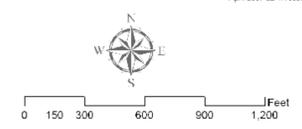


Figure #5  
 Steep Slope Map  
 Comprehensive Plan  
 Town Of Montreat

Source: Buncombe County GIS, North Carolina Department of Transportation (NCDOT) GIS, North Carolina Center for Geographic Information and Analysis (NCCGIA)

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## CHAPTER 3: MONTREAT TOMORROW

### 3.1 GOALS

### 3.2 THE PLAN FOR MONTREAT

### 3.3 RECOMMENDATIONS & IMPLEMENTATION STRATEGIES

#### 3.3.1 CHARACTER & DESIGN

#### 3.3.2 MANAGEMENT OF GROWTH

#### 3.3.3 TAX BASE & REVENUE SOURCES

#### 3.3.4 IMPACT OF THE MRA & COLLEGE

#### 3.3.5 HOUSING

#### 3.3.6 COMMERCIAL SERVICES

#### 3.3.7 TRAFFIC & CIRCULATION

#### 3.3.8 INFRASTRUCTURE

3.0 MONTREAT  
TOMORROW

# 3.0 MONTREAT TOMORROW

## 3.1 GOALS

Given the existing conditions in Montreat today, a set of goals for the town's future was established through the community involvement process. These goals were used to guide the development of the Comprehensive Plan. Collectively, these goals establish a framework for policy initiatives created to implement the various objectives and initiatives that are found in the Recommendations & Implementation Strategies section of the plan. These goals are not organized in the order of priority, all goals are equally important. However, the implementation strategies outlined later in section 3.3 are aimed at achieving these goals. Future prioritization of the strategies will be a reflection of the importance the community places on achieving each goal.

- A. The Town of Montreat will recognize the need for adaptive and constructive management of new development and redevelopment of land and structures in the community while preserving the character, quality of life, and natural beauty of the town.
- B. Maintain the natural integrity of the Conservation Easement and Ridgeline Protection ordinance while integrating passive recreation areas.
- C. Preserve the character of both the natural and the man-made environments while providing for the development and redevelopment of existing residential areas by developing and adopting standards for both land and building development that preserves and enhances the community's image while providing for responsible growth.
- D. Preserve the character of both the natural and the man-made environments while providing better circulation for all modes of transportation in the Assembly Drive corridor.
- E. Manage growth in the outlying areas in a manner that protects views and the character of the natural environment while providing opportunities for variations in housing form and layout.
- F. Focus and facilitate community activities, new development opportunities, and more intense uses into the town's center.
- G. Provide for safe and reliable water supply matched to the needs of the community and designed to serve future development and redevelopment.
- H. Provide efficient and reliable services to the citizens of Montreat that will accommodate future growth and limit damage from local erosion and flooding while complying with state and federal water quality requirements.
- I. Maintain a balanced network of streets, pathways and trails that accommodates the mobility needs of the residents, visitors and students whether they travel by vehicle, bicycle or foot while providing safe access to the properties in the community.
- J. Create a highly interconnected system of non-vehicular circulation routes to provide connectivity to community destinations with minimal disturbance to vegetation.
- K. Improve parking efficiency in the Town Center and establish standards for better parking management in areas outside the Town Center.
- L. Identify sources of funding for general fund and earmarked expenditures focused on the implementation of the community's plans to manage growth and investigate alternative revenue sources to supplement the town's budget, reduce dependence on real property taxes and seek opportunities to expand the tax base with new development consistent with the protection of the character of the community.
- M. The town should seek opportunities to coordinate and cooperate with the MRA and Montreat College on matters of common interest, including the joint use of facilities, use of land for multiple purposes, the accommodation of the needs of all three parties, and protecting the character and quality of life of the community.
- N. The town will embrace opportunities for alternative forms of land development and housing types to broaden the range of housing choices for its citizens, visitors, students and faculty, and retirees while protecting the character of the community.
- O. The town should allow limited commercial development to allow for the daily needs of its citizens, visitors, students, and faculty and to provide a focus for other community activities while protecting the character of the community.

## 3.2 THE PLAN FOR MONTREAT

The Comprehensive Plan for Montreat reflects the community's ideas for managing change throughout the town and the areas within the town's jurisdiction. As depicted in Figure #6, the plan for Montreat's jurisdictional area, and Figure #7, the Town-Wide Plan, and as described in the text that follows, the community has a desire to protect the many features that define the character of Montreat while accommodating minor development and redevelopment that will maintain, if not enhance, the quality of life residents and visitors enjoy. Design scenarios have been developed to illustrate portions of the plan in greater detail. These design scenarios represent only a few possibilities out of hundreds of potential ways to interpret the policies in the plan. They demonstrate how such policies might be manifested in future development or redevelopment.

### THE JURISDICTIONAL AREA BEYOND THE TOWN LIMITS

The plan for Montreat's jurisdictional area addresses the future of the areas that lie outside the town limits where even limited disturbance could cause significant alterations to the character of the town:

- the conservation easement,
- the scenic ridgeline areas, and
- the areas of potential change on the west side.

In their natural tree-covered state, these areas are the reason why the vistas from a variety of vantage points within the town are so scenic. The plan reflects the community's desire to minimize development in these areas and, in doing so, maintain the viewsheds as well as the valuable plant and animal habitats, among other things.

#### The Conservation Easement

North and west of Montreat's town limits, yet inside the town's ETJ, is a portion of the very large area of land in permanent conservation easement. Envisioned as an area to remain undeveloped, the easement was established years before the development of this plan. The only uses the community supports are limited to those dictated by the easement. Among those uses are low impact trails that respect the unique and special environment of Montreat. They provide an amenity enjoyed by residents and visitors alike. Wells needed to ensure the town has an adequate future water supply are also among the uses deemed suitable for the conservation easement, provided the digging and placement of such facilities are undertaken in a manner that limits land disturbance. The easement is more restrictive than any local regulations, such as zoning, and therefore, where in conflict, the conditions of the easement govern.

#### The Scenic Ridgeline Areas

The scenic ridgeline, appreciated by the town's residents and visitors, terminates most of the views from within the town. Recognizing this, the town established an ETJ boundary to protect its treasured ridgelines. As a result, Montreat exercises planning control 500 feet beyond the ridge. Like the easement, these areas are also envisioned to remain relatively undisturbed. However, a limited amount of uses are permitted, among them is agriculture, excluding logging.

#### The Areas of Potential Change on the West Side

On the town's western boundary and within the ETJ are two large parcels of property, one held by the Billy Graham Evangelical Association and the other, known as the Camp Merri-Mac property, in private ownership. Unlike the land held in conservation easement and the protected ridgelines, these two large properties represent significant areas where development may occur in the future, including some residential and institutional uses. If developed, each would have a significant impact on the town. Therefore, the plan calls for development that will complement existing development and be consistent with the character of Montreat, such as low density residential development.

### THE TOWN-WIDE PLAN

As detailed in the Town-Wide Plan (Figure #7), Montreat is considered and evaluated from its core, the Town Center, outward along Assembly Drive, its residential components and its outlying areas.

## The Town Center

At the heart of town, Lake Susan is the centerpiece of Montreat's Town Center. The lake is flanked by institutional buildings used by the MRA, the college and church. The mix of uses in the Town Center includes civic, institutional, service and residential uses, making the Town Center the most appropriate area to integrate a variety of desired non-residential uses. Through infill development, redevelopment and adaptive reuse of some structures, the introduction of a wider range of uses could strengthen this area as Montreat's Town Center. Based on predominant land use and activities, the plan looks at three sub-areas within the Town Center, identified as Town Center 1, Town Center 2 and Town Center 3, as delineated in the Town-Wide Plan.

Town Center 1 (TC1) is planned mostly for institutional uses and activities centered around the MRA. In addition to institutional uses, this area could include office, civic, residential and service uses. In TC1, the possibility exists for collaboration between the MRA and the college to address housing needs, especially the lodging needs the MRA experiences during the peak summer visitor season. The joint use of facilities could be encouraged here. Redevelopment infill opportunities also exist. For example, the Presbyterian Historical Society building at the intersection of Assembly Drive and Lookout Road could be utilized by the MRA as potential office space or by the town as a potential Town Hall, welcome center or community center. Despite being closed since June 2006, it could be used for a number of civic purposes, even while some of the organization's artifacts remain housed there.

Like TC1, Town Center 2 (TC2) is envisioned mostly as institutional with uses and activities centered around Montreat College. In this area, college offices and classrooms, student dormitories, staff housing and parking could be complemented by more of the same. In fact, the college has previously identified its need to expand or construct new dormitory space for an additional 400 students as it plans for future growth.

The Baseball Field Design Scenario (See Figure #9) specifically addresses the need for more student housing. Located just south of the Town Center, the baseball field site could be redeveloped as a dormitory. But because of this central location, as well as the demonstrated need for more housing during Montreat's annual seasonal influx of visitors, this dormitory could also house staff and MRA's conferees when not occupied during the academic year. At two floors, this concept illustrates roughly 110 rooms of student housing. At two students per room, this will accommodate 220 students, more than half of the college's projected enrollment growth in coming years. This two-story dorm scenario could be further expanded to three or four stories without significantly affecting the character of Montreat, providing additional housing options for college staff, MRA volunteers and MRA conference attendees. Like any new construction in Montreat, the architecture of this building should be in keeping with structures nearby, such as Assembly Inn and Anderson Auditorium, and employ similar building materials, like stone. It should be noted that, like other design scenarios, this is one out of many possibilities to develop this site. Montreat College has not endorsed this scenario.



Open spaces in the Town Center create an environment where people can relax.



New structures in the Town Center should feature lush vegetation.



New services in the Town Center could potentially provide additional dining options for Montreat.



The Town Center development could supply a variety of needs while respecting its immediate surroundings.



There are limited retail options in Montreat, but as and when Town is ready for it, it could be integrated in a way that fits with Town's character.

An additional benefit the town could realize from this concept, if implemented, is its basement level parking structure that could accommodate 165 vehicles. Meant for student parking during the school year, the parking structure would be valuable during the summer season when visitors attend conferences and vacation with family in Montreat. The benefits of the parking structure are covered in more detail in the parking recommendations provided in section 3.3.7 of Montreat Tomorrow.

Town Center 3 (TC3) could be a good location to have a mix of uses that complement uses in TC1 and TC2. Such a mix of uses could include a variety of residential uses such as dorms, townhomes or other residential products. Another use could be a small store. Presently, even the quickest trip to a store requires the Montreat resident to drive to Black Mountain. Other uses could include a patio café or small restaurant where patrons could enjoy the natural beauty of Lake Susan and the views to the ridges that surround Montreat.

Figure #10, the Town Center Design Scenario, shows one way the area can integrate complementary uses in this area. Open space used by the community today could continue to be utilized in the same fashion tomorrow. Buildings used for civic purposes could continue to be used in that manner. For example, the fond memories many residents and visitors have of barn dances should be relived and strengthened by the continued use of the barn for dances. At the lakeside, topography allows the creation of a stepped open green that could provide a gathering place for outdoor performances in the heart of Montreat or, when not in use for that purpose, a quiet space for passive recreation.

Among the buildings that currently exist, the Town Center Design Scenario addresses potential uses of the Left Bank building, including its continued use as office space. Other uses could include services such as a patio café or restaurant, even civic uses. Directly northwest of the Left Bank building and labeled on Figure #10 as “Infill Opportunity 1,” two structures with the potential to house a variety of uses are illustrated. This pair of buildings could be up to three stories tall, depending on the need for space. However, in order to maintain similar mass and verticality as surrounding buildings, each structure should be two stories and have architecture complementary to that of the Left Bank building and Assembly Inn. Any new structures proposed for Montreat should accommodate the need for certain services, housing or institutional requirements, as well as respect the historic composition of the built environment flanking Lake Susan.

### Assembly Drive

As the gateway into Montreat, Assembly Drive is envisioned to remain a scenic entranceway and corridor that sets the tone for the place. However, over time, minor changes could occur to allow this corridor to accommodate a wider variety of land uses without significantly altering the character of Montreat. A range of uses along Assembly Drive could include a richer mix of uses: institutional uses of the MRA, the town or churches; mixed-use; residential; services such as a bed and breakfast. Along Assembly Drive, the road’s cross-section may be changed to better accommodate non-vehicular traffic more comfortably to provide improved connectivity between destinations, as well as the use of multiple forms of mobility (See Figure #11, Assembly Drive Circulation Improvements).

### Residential Areas

Historically, the primary land use in Montreat has been single-family residential development (See Figure #2, the Land Use Map). In the Montreat of tomorrow, the community envisions a continuation of this pattern. The plan calls for two areas of primarily residential development. As shown on Figure #7, the Town-Wide Plan, Residential Area 1 could be predominantly single-family residential while Residential Area 2 could have a mix of residential types, single-family and multi-family.

Residential Area 1 could maintain a density of four dwelling units per acre (DUA) for single-family residential. Here, the appearance of existing single-family residential should be maintained for visual continuity. Montreat has a distinctive style of residential architecture, the cottage style, that honors specific design characteristics such as building materials, the consistent pitch of the roof lines, façade widths, the proportion and rhythm of fenestrations, and large porches. The scale in relation to other elements of the built environment in town and setbacks are also consistent. In addition, the built environment should continue to be integrated into the natural vegetation that is well preserved in Montreat.

Residential Area 2 could exhibit all the characteristics of Residential Area 1 except that it may allow a wider variety of uses and achieve the slightly higher densities, as contemplated for the area through zoning. In addition to typical single-family residential, Residential Area 2 could include bed and breakfasts and multi-family residential uses of up to five DUA. Such an increase in density is due to two reasons: the area's gentle topography and its proximity to the Town Center.

Founded upon an historic mission to provide opportunities for retired church workers, missionaries and ministers to live in Montreat, housing to accommodate them has always been an identified priority in town. Today, market forces, the seasonal influx of visitors, and the rising cost of land and construction are among the many factors impacting housing costs in Montreat. The plan addresses these issues in calling for a variety of housing types. In addition to Residential Areas 1 and 2, it identifies various locations throughout the town for additional housing and lodging, and suggests the appropriate housing types possible in those areas. For example, the plan calls for providing housing for retired ministers in the Town Center (See Figure 7, Town-Wide Plan) and it calls for the housing of students in a new dormitory to be built on the site of the current baseball field (See Figure 9, Baseball Field Design Scenarios). The plan suggests additional housing options for the MRA, its staff and volunteers and provides potential locations for infill development as an opportunity for the MRA, college and town to partner to find solutions to housing issues.

## Outlying Areas

Inside Montreat's town limit are general pockets of potential change areas, generally located toward the periphery of the valley and therefore referred to as outlying areas. (See Figure #7 for the location of these areas.) They include the Harmony area, the Claybrook property area, the Lookout Road area, the Upper Kentucky Road area and the Northern Montreat area. These areas are important to the town because changes could significantly alter the character of the town and its much-valued viewsheds. Here, the plan offers three design scenarios: conventional subdivision design, conservation subdivision neighborhood design and cluster design. These three design scenarios are seen as figures 8A, 8B and 8C and are detailed in this section of the plan.

These areas represent the few remaining developable areas that have not been placed in the conservation easement. While adding these areas to the easement is an option each property owner could consider, it is more likely that the owners will develop these parcels at some point in the future. Because of the topography and difficult access, these areas present opportunities to stray from the conventional subdivision. Some areas would require the assemblage of several parcels for replatting so that the layout of a future subdivision is more sensitive to the physical constraints that have been an obstacle to development for some property owners.

The uses are expected to be primarily residential at current densities of 4 DUA, with some areas providing more variety of residential choices than others.

The conservation subdivision approach suggested in the plan allows for the same density on smaller lots by modifying the minimum lot size requirements in the ordinances to protect more open space. Studies have suggested that people place more value on preserved open spaces and are willing to live on smaller lots to be near—and have access to—these open spaces.

Regardless, development should be mindful of and protect current views and the natural environment. In addition, all new development should be consistent with the Montreat character, scale and architectural style that has been previously explained in this report. This includes minimal disturbance to existing vegetation, limited impervious surface area and respect for existing mountain viewsheds.

In order to provide an example of how the outlying parcels may develop, a series of design scenarios has been provided for the Claybrook property if and when the owner decides to develop it. Located along Chapman Road, the Claybrook property is one of the few, larger developable properties in Montreat. The site is approximately 9.7 acres. It is surrounded by single-family detached housing to the north and undeveloped land to the east, south, and west. This undeveloped area is currently located within the conservation easement. The site is currently bisected by the Rainbow Trail, a low-impact trail that is part of a town-wide and regional trail system.



Residential development will offer more open space and be less intrusive on the natural environment.

The scenarios presented offer three different possible approaches to how the site could be developed. This is only a design study, one of many ways to interpret the policies in the plan, and shows how such policies might be manifested in future development or redevelopment. The first approach is a conventional subdivision design that illustrates what can be done based on existing regulations. The second approach is a conservation subdivision, a design that protects a large amount of open space and clusters single-family lots together to limit the impact on the natural environment. The third example is the cluster design approach. It protects a large portion of open space and may provide a different housing product than single-family homes. These three scenarios are defined as follows:

#### **Conventional Subdivision Design (Shown as Figure #8A)**

This type of development utilizes the maximum area available on a given parcel of land. Currently, zoning regulations and the lack of conservation incentives encourage the conventional approach. Using the Claybrook property as a test case, a conventional subdivision would, by right, offer 33 units. This provides a gross density of 3.4 units per acre, which is allowed by the current zoning code. The conventional neighborhood development does not necessarily set aside land for conservation purposes nor does it try to preserve existing views from lower elevations toward the mountainside; the land could be extensively graded and developed, leaving behind a limited amount of aged vegetation. One of the largest problems is the exposure of this development from various views in Montreat. Conventional design does not often result in uninterrupted viewsheds.

#### **Conservation Subdivision (Shown as Figure #8B)**

Driven by the desire to conserve open space, conservation subdivisions reduce the per unit impact on the environment by creating smaller lots and bringing them close together. This is done to maximize the amount of open space and conserve land for a variety of open space purposes, such as the protection of natural habitats. In the instance of the Claybrook property, as shown in Figure #8B, a conservation subdivision would conservatively offer 35 lots, 6% more than otherwise would be allowed. This particular illustration preserves close to 40% of the site, while the remaining land is used for the development of single-family detached housing units. These “pods” could each contain a handful of homes while the rest of the site is protected from development. These homes, which should reflect the character and design of Montreat’s unique architectural style as highlighted in the Montreat Today portion of the plan, should be one to two stories tall. If appropriate regulations that allow for flexibility on minimum lot size requirements, and incentives, such as density bonuses, are in place, developers may choose to group development and conserve more land.

#### **Cluster Design (Shown as Figure #8C)**

By employing the cluster design scenario, over 40% of the site could be protected from development. The remainder of the site has been designed to maximize the number of clustered units in the developable area. Each building structure in Figure # 8C represents two to three units. This illustration depicts 39 total units, each with 2,500 square feet and a two-car garage. In this approach, the developer gains a 20% density incentive compared to the conventional design. These attached homes are designed for homeowners who wish to live in a larger home but do not want the maintenance a larger home usually requires. Still, each attached home unit has its own private courtyard, complemented by the site’s preserved open space, including an area of a community green, as seen in Figure #8C.

### 3.3 RECOMMENDATIONS & IMPLEMENTATION STRATEGIES

To realize the vision for Montreat and to achieve the stated goals, this section outlines broad recommendations on a variety of topics and specific implementation strategies for each recommendation to put this plan into action. But they can not remain locked within these pages. Implementation of the plan in accordance with the recommendations and strategies is key to realizing the vision. The existing steering committee could act as the implementation committee along with necessary expansion of town staff to implement this plan. Some of these implementation strategies are within the control of the town. Others are subject to the desires and expectations of individual property owners and community institutions. Yet, others are the prerogative of the North Carolina General Assembly to allow. As such, it may be impractical to expect that each and every strategy will be accomplished. Even if priorities dictate one choice over another, each strategy contributes to realizing the community's vision for tomorrow. Recommendations and implementation strategies outlined in this section need to be reviewed and prioritized to achieve the short-, mid-, and long-term needs of the community.

While there was general agreement on the broader issues and the goals that were set during the process, a wide variety of diverging views and opinions expressed during the process complicated the effort to define the appropriate solutions. Based on the input received throughout the planning process, the consultant team generated these recommendations and implementation strategies which the town may choose to follow or not.

#### 3.3.1 CHARACTER & DESIGN

##### Overview

As a top priority to protect its character, the town should commission a study sufficient to determine what, if any, structures have historical significance at the local, state, or national level. As part of that study, an analysis can be performed to identify all 'contributing structures' that can result in the demarcation of areas that could be designated as historic districts. Within these districts, architectural standards may be enforced on new and renovated structures to preserve the character of the historic district. It is important to understand that an historic district is often viewed as a very strict form of government control.

As a second priority to protect this character, the town should adopt more specific controls on land development that encourages more compact development and tightens the standards for development on sloping sites. These standards would include limits on the amount of land that can be disturbed, controls to minimize erosion and the concentration of overland water flows, and the development of a more versatile means to regulate the height of structures.

The town should consider the development of a Montreat Manual that would incorporate an illustrated guide for basic land development standards with additional guidelines for structure design characteristics that have been identified as common or desired in Montreat.

##### Summary of Character & Design Issues & Opportunities

- Montreat's buildings of historic value are not adequately protected.
- New construction in Montreat does not reflect the style of architecture that contributes to the town's character.

##### Recommendations & Implementation Strategies

**Recommendation 1:** Increase the possibility of preserving structures that are of historic significance in the town.

**Strategy 1:** Evaluate the advantages and disadvantages of a local historic district.

**Note 1:** *Establishment of a local historic district involves a series of steps. These steps are briefly outlined below –*

1. *Establish a Historic District Commission that will oversee the historic designation process.*
2. *Conduct a professional survey of structures of historical significance that would be deemed "contributing" and create a "Designation Report" that not only describes and identifies the location of such structures but also delineates a district.*
3. *Send this report to State Historic Preservation Office (SHPO) in Raleigh for its review.*
4. *Based on the feedback from the SHPO and the professional survey, evaluate the possibility of the establishment of a local historic district based on the study.*

5. *After such district has been established, the historic district commission will set guidelines for modifying properties and for new development within the district.*

**Note 2:** *Several towns within North Carolina have adopted local historic districts that are administered by historic district commissions. Examples that the Town of Montreat could look into are those in Town of Davidson and Town of Chapel Hill.*

**Strategy 2:** Create a mechanism for educating property owners about the value of historic structures, particularly their value to the town, and raise awareness of losses, of potential losses and the negative impacts of the losses of historic structures.

**Note:** *One method to increase awareness could be the addition of an educational session on the agenda of the annual Cottagers' meeting.*

**Recommendation 2:** Ensure that areas outside of the town limits but within the ETJ are preserved.

**Strategy 1:** Evaluate the official zoning map and determine the extent to which the zoning provides the protection for this land as envisioned in the comprehensive plan.

**Note:** *The zoning map may depict the Woodlands and the R-3 zoning districts. However, it is unclear, due to the map color selected for the Woodlands district and the expansion of the ETJ to include the ridgeline areas, whether the entire planning area is zoned.*

**Strategy 2:** Update the zoning map to ensure all zoning districts are clearly delineated.

**Strategy 3:** Revisit the uses in the Woodlands and R-3 and determine whether the permitted use lists require revisions to adequately manage growth outside of the town.

**Strategy 4:** Evaluate the need for a new zoning district for the areas beyond the town limits to better manage growth.

**Recommendation 3:** Guide the design of new and renovated structures in existing neighborhoods to foster consistency in scale, style, materials and design with the existing built form that is characteristic of Montreat.

**Strategy 1:** Create architectural design guidelines for new and renovated houses to preserve character.

**Note:** *While not a regulatory tool, such guidelines will communicate the expectations of the town to potential developers and future residents. Examples of architectural standards and design guidelines are included as Appendix H and Appendix I at the end of this document.*

**Strategy 2:** Create architectural design guidelines for the Town Center area that will promote design that is in accordance with the overall character of its surroundings.

**Note:** *The Town Center, as described in Section 2.0 Montreat Today and Section 3.2 The Plan for Montreat, is organized around Lake Susan and has some of the most prominent and architecturally interesting buildings. Any new structure in this area should complement the style and character of its surroundings.*

**Strategy 3:** Create a "Montreat Manual" to serve as an illustrated guide for basic land development standards to address design principles for locating structures (orientation and placement), fences, walls, and materials throughout the town.

**Strategy 4:** Modify zoning ordinance to ensure that new homes conform to the setbacks of existing structures to provide visual continuity.

*Note: Especially along Assembly Drive, make sure that the construction of any new structure adheres to the setbacks of structures on either side being developed, or, the setback of the entire block, whichever is more stringent.*

**Recommendation 4:** Preserve the character of Assembly Drive.

**Strategy 1:** Create an Overlay District that allows for a variety of uses, such as institutional (e.g. church), mixed-use, residential and services.

**Strategy 2:** Set standards for the Overlay District that includes:

- Minimum setbacks (whichever is more stringent of the following)
  - o Minimum setback of 100 feet from centerline
  - o Average setback of the two adjoining structures
- Building height less than two stories or 35 feet
- Preservation of existing vegetation
- Incorporate provisions for the replacement of trees (e.g. require two new trees replace each mature tree taken down).

**Recommendation 5:** Promote a compact form of development.

**Strategy 1:** Modify the town’s zoning ordinance to allow for a more compact form of development through flexibility in the requirements governing minimum lot size, yards, etc.

**Strategy 2:** Add Conservation Subdivision design and clustering standards as options in the subdivision ordinance.

**Recommendation 6:** Improve hillside development regulation language to further protect environmentally sensitive areas and existing views for proposed developments that are less than a 25% grade slope.

**Strategy 1:** Establish a height limit for non-residential structures to a 60-foot maximum (measured as the vertical distance of a building / structure as measured from the average elevation of the ground level at the structure foundation to the uppermost point of the roof) or limit the height of the proposed building so that it cannot exceed the tallest existing tree canopy on the lot, whichever is the most stringent application.

**Strategy 2:** Evaluate the possibility of establishing a maximum disturbance and maximum impervious cover similar to Buncombe County’s Zoning Ordinance as outlined in the dimensional requirements (Section 78-642).

**Recommendation 7:** Improve hillside development regulation language to further protect environmentally sensitive areas and existing views for proposed developments that are equal to or greater than a 25% grade slope.

**Strategy 1:** Evaluate the possibility of applying more stringent regulations on slopes greater than 25%.

**Note:** Consider maximum disturbance and maximum impervious regulations outlined in Buncombe County’s Zoning Ordinance (Hillside Development Standards 70-68(e)), which is outlined below:

- Maximum disturbance:
  - Sites with 25 to 35 percent slopes
    - Maximum gross site area disturbed = 30 percent
    - Maximum gross site area impervious = 15 percent
  - Sites greater than 35 percent slopes
    - Maximum gross site area disturbed = 15 percent
    - Maximum gross site area impervious = 8 percent

**Note:** Consider reducing the building height of residential and non-residential to existing standards or such standards outlined in Jackson County’s Zoning Ordinance (Steep slope Ordinance 16.5), whichever is most stringent. Jackson County’s ordinance is below:

“The height of any building shall not extend closer than 20 feet to the uppermost point of any protected mountain ridge, as that term is defined herein, on which said building is constructed. For the purposes of this Ordinance, the uppermost point of the crest, summit, or ridge top refers to geological formations and not vegetation.”

**Note:** Consider utilizing a density-scale similar to Buncombe County’s Zoning Ordinance (Hillside Development Regulations 70-68(d)) that will gradually reduce the permissible density of a site based upon incremental increases in slope percentages, which is indicated below:

SLOPE %	UNITS PER ACRE	MINIMUM LOT IN ACRES
25	1.250	0.80
26	1.064	0.94
27	0.926	1.08
28	0.820	1.22
29	0.735	1.36
30	0.667	1.5
31	0.625	1.6
32	0.588	1.7
33	0.556	1.8
34	0.526	1.9
35	0.500	2.0
36	0.476	2.1
37	0.455	2.2
38	0.435	2.3
39	0.417	2.4
40	0.400	2.5
41	0.385	2.6
42	0.370	2.7
43	0.357	2.8
44	0.345	2.9
45	0.333	3.0
46	0.323	3.1
47	0.313	3.2
48	0.303	3.3
49	0.294	3.4
50	0.286	3.5
51	0.278	3.6
52	0.270	3.7
53	0.263	3.8
54	0.256	3.9
55	0.250	4.0
56	0.217	4.6
57	0.192	5.2
58	0.172	5.8
59	0.156	6.4
60	0.143	7.0
61	0.132	7.6
62	0.122	8.2
63	0.114	8.8
64	0.106	9.4
65	0.100	10

*As the table and the definition of hillside area indicate, any proposed development whose average natural slope is less than 25 percent is not subject to the regulations for permitted density as set forth herein. Any proposed development which meets the definition of hillside area and whose average natural slope is above 65 percent is subject to the most restrictive percent labeled on the maximum density scales.*

**Note:** Consider establishing regulations that require roadways to follow existing and natural contours.

**Recommendation 9:** Continue to protect the environment by collaborating with the National Wildlife Federation and state agencies to promote awareness about the unique wildlife habitat found in the planning area.

*Note: The National Wildlife Federation designated the Town of Montreat and the surrounding area as a designated Community Wildlife Habitat. This area is also on North Carolina's registry of Natural Heritage Areas.*

**Recommendation 10:** Improve signage and monumentation to aid in circulation and wayfinding.

**Strategy 1:** Institute a committee that will establish guidelines and oversee the process of signage design, monument design and wayfinding.

**Strategy 2:** Identify critical locations where the placement of signs and/or monumentation will add to the character of that area and also help in orientation for visitors by identifying key buildings, structures and uses.

*Notes: The intersection of Lookout Road and Assembly Drive presents an opportunity where a monument, along with an appropriate sign, announces the Town Center, and therefore acts as a gateway while directing residents and visitors to key buildings such as Assembly Inn, Anderson Auditorium and various buildings of Montreat College.*

### 3.3.2 MANAGEMENT OF GROWTH

#### Overview

To a certain degree, growth is inevitable. But as growth management is described in section 2.0 Montreat Today, traditional growth and planning models do not apply in Montreat. In a town affected as much as Montreat is by its physical surroundings, by the limitations on annexation and by the fact that the largest consumers of services pay little or nothing in taxes, a small amount of growth can have a large effect. Bound by a common vision for Montreat, it is critical that the town's leadership effectively manage growth to maintain the town's unique character.

#### Summary of Management of Growth Issues & Opportunities

- Montreat can not grow in a traditional sense due to physical limitations. This poses challenges for finding sources of additional revenue.
- The growth of the MRA and Montreat College plus increased interest in residential development creates pressure on existing infrastructure such as roads, water, sewer, etc.
- Growth could change the quality of life in Montreat.

#### Recommendations & Implementation Strategies

**Recommendation 1:** Implement the Comprehensive Plan.

**Strategy 1:** Subcommittees shall be formed for various topic areas and volunteers, including some Comprehensive Plan Steering Committee members, will be recruited to serve as the "Implementation Committee" to execute the various recommendations and implementation strategies as prioritized by the Implementation Committee.

**Strategy 2:** Adopt new regulations and improve existing regulations as mentioned throughout in this section to address Montreat's issues and opportunities.

**Strategy 3:** Update the Comprehensive Plan on a regular basis and no less than every five years to address the changing needs of the community.

### 3.3.3 TAX BASE & REVENUE SOURCES

#### Overview

Montreat's unique history, development patterns and land ownership pattern conspire to severely restrict the town's ability to diversify and grow its tax base. This limited ability creates numerous concerns when discussing the town's future. Citizens abhor the notion of continually rising property taxes but expect the town to maintain, even expand, the services it offers. The discussion of growth and consequences raises fears of new expenses and higher taxes. This frustration is evident in the community survey and from comments at community meetings. Two large institutions in Montreat, the MRA and the college, drive the need for municipal services yet do not adequately contribute to the town's property tax base. However, both institutions contribute in a variety of ways to the overall betterment of the town. For example, the MRA maintains a considerable amount of trails through its volunteers. The MRA also maintains the Lake Susan dam, and both institutions provide their buildings for community use on a regular basis. Montreat does not provide electricity or gas as a municipal service so revenue from those traditional sources is not available. And Montreat has little, if any, land to accommodate commercial or industrial land uses which most municipalities count on to significantly add to town coffers through sales and property taxes. For this dilemma, there are no simple answers.

The means by which municipalities raise revenue is prescribed and limited by the North Carolina General Assembly through standard enabling legislation and through special legislation proposed by individual towns, cities and counties. The standard legislation provides a variety of methods by which the town may raise revenue, principally through taxes and fees. Special legislation provides authority to levy taxes or fees for certain limited purposes. For example, many resort communities have been granted the ability to levy an "occupancy" tax, sometimes called the "Hotel / Motel" tax which raises funds from visitors who occupy hotel rooms. These additional revenue sources supplement more common taxes such as the property tax and sales tax. Montreat should avail itself to all authorized means to raise municipal revenues and should consider seeking special legislation to supplement its options where possible.

The town may have a little more flexibility in the imposition of user fees to address specific needs. The town attorney would need to advise the Town Council as to its authority for certain purposes, but several fees have already been suggested in prior sections of this plan- stormwater fees, increased fees for building permits and increased fees for inspections are examples. While the ability to impose a "tax" on otherwise tax-exempt institutions may be questioned, the ability to establish fees that simply recognize and offset the specific impacts or community costs in the provision of services is a common practice. The town should evaluate those areas of service where specific user fees are authorized or appropriate, even if the initial perception regarding specific proposed revenue streams is unpopular. For example, according to the Institute of Government at UNC Chapel Hill, the state allows towns to implement a privilege license fees on certain businesses, including on the employees of tax-exempt entities such as the MRA and Montreat College.

The accommodations tax, privilege license fees and, with General Assembly authorization, fees on heavy vehicles passing through town, are but a few examples that fit Montreat's circumstances.

In addition, the town should consider retaining the services of a grants specialist to evaluate and recommend what government or private grants may be available and appropriate for Montreat. Millions of dollars are awarded to communities annually by various organizations. While these awards are not always recurring, they can provide new funds for special needs or projects that would benefit the community.

Montreat could propose that the General Assembly create a special funding act for communities that have large areas set aside for permanent open space that benefits the state as a whole. For example, if Clean Water Act funds are used to acquire conservation easements over thousands of acres, the entire state benefits but it severely impacts the local municipality's ability to earn taxes from that property. This is certainly the case for Montreat. Other communities may support such an effort and the local delegation would have to carry the bill to Raleigh. While long-term financial decisions should not be based on such a plan, the potential benefit could be worth the effort.

Other ideas for potential revenue sources could include the Real Estate Transfer Tax and solid waste fees. In the session of the North Carolina General Assembly that concluded in July 2007, the state granted counties the option of placing two ballot initiatives before voters to raise additional revenue. Counties are allowed to ask voters to approve one of two funding

options: an extra quarter penny on the county's existing sales tax, or, increase the existing real estate transfer tax from the statewide 0.2% currently collected to 0.4% within that particular county. Counties may have either of these two options but not both. With state and county approval, Montreat could request similar options.

Expanding the tax base is equally challenging. While the town can tell property owners what they may or may not do with their land, it can not compel owners to develop their property. It will be necessary to rely on the good graces of property owners, especially the institutional owners, to 'think outside the box' when it comes to development of their land. The means by which the needs of these institutions could be met, in fact, could add to the town's tax base. As has been noted earlier in this plan, a developer might choose to enter a joint venture to provide office space or other facilities for the MRA, the town or the college by building a privately-funded building on MRA, town or college land that is not currently taxed. Montreat College might enter into an agreement with a developer to build student housing and parking on land owned by the college. Or, a development proposal might come to the town for a mixed housing / retail project that is funded privately but needs the zoning necessary for construction. All of these examples would add to the tax base and all could be accomplished within the concepts presented in this plan.

### Summary of Tax Base & Revenue Sources Issues & Opportunities

- Montreat has restrictions in its ability to diversify and grow its tax base.
- The tax-exempt nature of the two major institutions in Montreat limits the town's ability to generate taxes.
- Montreat has little land to accommodate commercial and industrial land uses, and has limited ability to annex.

### Recommendations & Implementation Strategies

**Recommendation 1:** Investigate and consider alternative sources of revenue.

**Strategy 1:** Expand the potential sources of revenue to include user fees, special assessments, negotiated payments in lieu of taxes, and facility fees.

*Note: See Appendices D, E, and F for more information on potential sources of revenues allowed municipalities in North Carolina.*

**Recommendation 2:** Consider new taxes, such as the real estate transfer tax and/or occupancy tax, to supplement tax revenues already being collected.

**Strategy 1:** Request the state grant Montreat the ability to levy- and the county grant Montreat the approval to create a ballot initiative for the right to levy- a Real Estate Transfer Tax.

*Note: Presently, counties, not towns or cities, levy, collect and benefit from funds raised through the Real Estate Transfer Tax.*

**Strategy 2:** Request the state grant Montreat the ability to levy an occupancy tax, or similar fees, on lodging / rentals.

**Recommendation 3:** Consider new fees for vehicle permits, parking permits, building permits, inspection fees, or privilege license fees on certain businesses. (See also *Vehicle Mobility Recommendation 4, Parking Recommendation 6 and Infrastructure Recommendation 2.*)

**Recommendation 4:** Consider retaining the services of a grants specialist to seek grants from both public and private entities that may be available and appropriate for specific needs.

**Strategy 1:** Coordinate with the Land of the Sky Council of Governments or a similar entity to seek help in grant writing.

**Recommendation 5:** Expand the tax base by increasing the amount of taxable property.

**Strategy 1:** Encourage public / private partnerships to joint venture on opportunities to build taxable student housing, parking structures and/or other facilities on land currently owned by the tax-exempt institutions.

**Recommendation 6:** Seek special legislation to mitigate the impact of loss of revenue due to the conservation easement.

**Strategy 1:** Coordinate with League of Municipalities and investigate the opportunities to collaborate with municipalities with similar constraints and draft a bill to identify means to generate funding.

### 3.3.4 IMPACT OF THE MRA & MONTREAT COLLEGE

#### Overview

Montreat owes its existence to the creation of the MRA, which functioned much like a municipality until 1967. The MRA built most of the public infrastructure that exists in the town today and still maintains significant open space and recreation resources that are open to the public. Montreat College is an outgrowth of the original mission of the MRA and has become a well-recognized educational institution in its own right. These two institutions, more than any other factors except the natural environment, define Montreat and have set the stage for what Montreat is today.

The MRA and the college represent the physical heart of the community, as well as the town's dominant land uses. Both institutions have endured difficult times yet both look forward to promising futures. They have experienced growth pains, but still plan to grow in the future, if not physically, then in their programming. The community has expressed the desire for both institutions to remain in Montreat and prosper in the future.

The sizes of each institution plus the fact that they are both 'tax-exempt' presents a tax base challenge for the town. The MRA and the college place capacity demands on the water supply system and through their programs bring traffic to local streets. The two institutions pay the same rate for water and sewer services as other customers, but as the two institutions grow they will place a burden on the town's ability to expand its water infrastructure. They are the primary employers in the town and the two greatest reasons why people visit Montreat. Montreat could be radically altered if either entity changed significantly.

Both the MRA and Montreat College are actively planning for their futures. This is especially true of the college. The fact that these parallel planning activities is ongoing is significant. Hopefully, as three 'legs of the stool,' the town, the MRA and the college can plan their futures together. The cooperation and coordination between entities will be critically important in the near future as decisions are made about infrastructure, expansion of activities, and mitigating the impacts of development. The town should take full advantage of this heightened cooperation and coordination to better manage its growth and its responsibilities to its citizens. The pairing of the MRA, the college, or the town with a private sector entity could, for example, lead to the development of buildings and facilities which would not be tax-exempt, adding to Montreat's tax base.

#### Summary of MRA and Montreat College Issues and Opportunities

- The MRA and Montreat College are the two institutions that dominate the town, driving both the demand and need for services, such water and sewer.
- Both the MRA and the college are tax-exempt organizations which presents a tax base challenge for the town.
- The MRA owns significant amount of vacant land that could be developed at some point in the future.

#### Recommendations & Implementation Strategies

**Recommendation 1:** Create opportunities where the major institutions in Montreat may collaborate for common purposes.

**Strategy 1:** Explore joint venture opportunities between the town, MRA and Montreat College that could lead to the co-development of facilities shared by the institutions or the co-development of facilities with the private sector, including structures and parking.

**Strategy 2:** As identified in Recommendation 5 in the Tax Base & Revenue section, the town should encourage the public / private partnership between various institutions and private developers by providing incentives such as density bonuses, the contribution of land or funds, or through the acceleration of the approval process.

**Strategy 3:** Investigate opportunities to identify a location for a new town hall in collaboration with the MRA and Montreat College as they expand, renovate or add to their existing facilities.

**Note:** *The existing Historic Society building near the intersection of Assembly Drive and Lookout Road could be one potential location and goes well with the description of Town Center 1 as outlined in section 3.2.*

### 3.3.5 HOUSING

#### Overview

The town should consider adopting development standards that relate housing development to the land, to infrastructure capacity, and to the needs of the community operating in a unique housing market. Subdivision standards should encourage, and in some cases require, more compact development that allows for housing to be provided while protecting the natural environment. Today, Montreat lacks regulations or standards to encourage conservation and clustering development.

Both the Conservation Subdivision Neighborhood and the Cluster Design offer opportunities to conserve open space and reduce the per unit impact on the environment through employing smaller lots and placing them in close proximity to other residential lots. More, they allow the developer to modestly increase densities while significantly reducing its impact. With the right incentives, such as density bonuses, it could be possible to create more opportunities for various housing choices while preserving more land for open space. Allowing property owners the by-right option to choose the Conservation Subdivision or Cluster Subdivision would help the town increase density and preserve the character of Montreat. The town should remain predominantly single-family residential in its land use, striving for an overall density of four DUA within the developed area outside the conservation easement.

Standards should be developed that allow ‘accessory housing’ to be developed. Accessory housing typically takes the form of a small free-standing structure, such as a garage apartment, or is included within the principal single-family structure. The allowance for such housing could increase the supply of seasonal housing, provide income for home owners, provide affordable housing for students and others, and increase the tax base. Simply put, allowing accessory housing increases the housing diversity available in Montreat. Another consideration regards opportunities for mixed-use development that would provide needed housing as part of a larger development or redevelopment of land or buildings within the town. This could provide opportunities for the MRA and the college to joint venture with private or other institutional interests for needed facilities while allowing higher density housing as part of the development. Furthermore, creating new design standards is essential to encourage consistent appearance among structures, especially in the case of redevelopment.

An innovative housing philosophy that holds great promise has emerged in recent years and would be a good fit for Montreat and its institutions. The concept, called ‘Shared Equity Homeownership’ (SEH), provides for actual ownership of housing units while managing the upward escalation of prices and allowing the owner to share in the equity appreciation of the housing unit. Using this approach, a state or local government, or other institution, provides funding or services that helps a perspective homeowner afford a home. In return, the government shares in the benefits of any home appreciation. Later, when the homeowner sells the home, the government may be repaid or the value stays with the home, reducing its cost for the next buyer. There are numerous models of SEH operating around the country. The practice has been most successful in areas with supportive policies, equitable taxation, and a durable housing market. Montreat has or can have all of these attributes. The MRA and Montreat College are institutions with the housing needs and opportunities to take advantage of this type of program. The regulations needed to facilitate these programs are no different than those which are appropriate for other forms of land and housing development. To fulfill the original mission of the Montreat community, the town should explore and encourage a SEH-type program.

Lastly, Montreat should modify its policies regarding residential structures. To respect the views from neighboring homes to

the surrounding mountains, as well as relate the home's height to steep slopes, a height limit of 35 feet for single-family residential structures is suggested.

### Summary of Housing Issues & Opportunities

- Montreat lacks the regulations and standards to encourage conservation and cluster development.
- Montreat lacks a variety of housing choices for retired ministers and church professionals.
- Development and re-development of significant size housing structures on steep slopes and higher elevation have impacted the views from key locations.

### Recommendations & Implementation Strategies

**Recommendation 1:** Maintain a predominantly single-family residential land use at an overall density of four DUA.

**Strategy 1:** Maintain the permitted uses at the permitted density for the R-1 and R-3 districts in the existing zoning regulations.

**Strategy 2:** Consider only amendments to the official Zoning Map that result in the reduction of the R-1 and R-3 districts if such amendments are consistent with the Comprehensive Plan.

**Recommendation 2:** Provide as an option an alternative to conventional subdivision: cluster or conservation development patterns where possible to preserve the natural environment.

**Strategy 1:** Modify the zoning ordinance and subdivision ordinances to allow for conservation subdivision by right for the outlying areas as identified in Figure #7, the Proposed Town-Wide Plan.

*Note: Provide a definition of conservation subdivision in the zoning and subdivision ordinances and communicate to the development community about its relevance to the Town of Montreat.*

**Strategy 2:** Modify the minimum lot size requirements in the zoning ordinance / subdivision ordinance to allow for the flexibility in lot dimensions to encourage conservation subdivision.

**Recommendation 3:** Allow for higher densities to encourage the use of conservation subdivision / cluster subdivision development.

**Strategy 1:** Provide density bonuses to developers who use the conservation subdivision approach to encourage this form of development pattern.

**Recommendation 4:** Allow a variety of residential dwelling types within Montreat to increase housing diversity.

**Strategy 1:** Modify the zoning ordinance to allow for attached housing as part of conservation subdivision approach in residential districts R1 and R3.

**Strategy 2:** Modify the zoning ordinance to allow for townhomes, especially within the Town Center 3 area (see section 3.2 for a detailed description), to allow for higher density residential near the core of the town.

**Strategy 3:** Allow for student housing in Town Center 2 area.

*Note: The existing baseball field could be one such opportunity. See Figure #9.*

## 3.3.6 COMMERCIAL SERVICES

### Overview

Much of what might be normal retail or community services, such as food and lodging, as well as very limited retail service,

has historically been provided by the MRA and Montreat College for their visitors, staffs and students. But those same customers, along with a growing residential population, and what over time will likely include a certain ‘tourist’ component, may be able to support some additional limited services. These new services might be provided in cooperation with the two institutions or as a separate venture. The town should embrace such opportunities by adopting land development standards that allow such uses but do so only with appropriate controls on location, design and parking to protect the image and character of the community.

### Summary of Commercial Services Issues & Opportunities

- Most of Montreat’s commercial services have been historically provided by the two tax-exempt institutions, the MRA and the college. These institutions may or may not be able to deliver the future need for services.
- In the future, Montreat’s growing number of residents and seasonal visitors may drive greater demand for commercial services.

### Recommendations & Implementation Strategies

**Recommendation 1:** Adopt land development standards and controls that allow service uses in appropriate areas but still protect the image and character of the community.

**Strategy 1:** Modify the zoning ordinance to allow for service uses in appropriate locations as noted on Figure #7, the Proposed Town-Wide Plan.

*Note 1: As described in section 3.2, The Plan for Montreat, the Town Center 3 area is an appropriate location for any service related uses that may be deemed appropriate by the community in the future. The range of uses that could be allowed at this location could vary from a small lakeside restaurant, patio café, or a small store. Other uses, such as office or civic uses, could also be allowed in this area.*

*Note 2: To allow service uses in Town Center 3 will require the town to create a new zoning district, Neighborhood Services, for example. It will also require the town change the zoning map and the zoning text.*

**Strategy 2:** Define a town center district and add to the zoning ordinance and zoning map.

## 3.3.7 TRAFFIC & CIRCULATION

### A. Vehicular Mobility Overview

Montreat’s streets form a contorted pattern that resembles a tree with many branches: it has one main trunk that supports all the limbs above. Formed by the natural contours of the land and water, even today this winding street pattern is a challenge for further growth. Maintenance of the system, while challenging due to its age and the difficult topography over which the streets pass, should continue. With only one way in and one way out of town, the preservation of Assembly Drive, the ‘trunk,’ should be a high priority. This vital corridor includes both vehicular and pedestrian features and needs to be improved to safely accommodate bicycle traffic. Improved bicycle mobility may help to reduce vehicle trips.

Secondly, Montreat should evaluate the platted but non-built streets to determine the need, practicality and likelihood that they could ever be constructed. The elimination or relocation of such streets might be accomplished through the development process. Also, due to the age of some streets and the fact that North Carolina Department of Transportation maintenance stops at the town gate, Montreat should consider placing limitations on the weight of vehicles using the town’s streets since heavier vehicles can be significant damage to roadways. Other considerations in regard to vehicles in Montreat should include evaluating a permit system for all vehicles. Fees from vehicle permits could be applied to the costs of street maintenance. Also, a permitting system for vehicles has the potential to be implemented in ways to better manage traffic flow during the peak visitor season.

Evaluating street design should be a priority for the town. The town could also identify areas of transition by creating features or foci, especially in the Town Center, as part of street design. Lastly, the town should consider an opportunity to decrease traffic congestion through encouraging cooperative and collaborative partnerships between the MRA, Montreat College and the Town of Black Mountain by utilizing Mountain Mobility or other shuttle service(s) that employ the use of satellite parking facilities outside Montreat.

## B. Non-Vehicular Circulation Overview

Montreat has an extensive network of pathways and trails that connect the community to the wilderness beyond. This system could be expanded and improved to connect key destinations within the community, as well as connect hikers and bikers to points outside of Montreat, such as Black Mountain. Montreat should prioritize the enhancement of the trail system, indeed the entire pedestrian network, to focus on areas where the improvements would provide better mobility and create the greatest benefit to the most people, from novices to expert users. The town should evaluate and consider the creation of a dedicated fund for pedestrian amenities.

Improving mobility is crucial throughout Montreat, but especially vital in the Town Center area. Connections to the Black Mountain Trail along Assembly Drive should include widening, improving and maintaining the existing path by constructing six-foot to eight-foot pathways for hiking and biking along Flat Creek. Refer to Figure #11 to see various alternatives that could accommodate bicycle and pedestrian amenities on Assembly Drive. In the Assembly Drive and other important corridors, the town should provide space to accommodate bicyclists, as well as provide ample room for conveniently located bike racks. Sharing the roadways with walkers and bikers encourages the use of transportation modes other than vehicles. Providing racks for cyclists to secure their bicycles at strategic locations throughout the town encourages the use of multiple modes of transportation.

So too, this improved and integrated network of pathways should connect existing residential areas to the Town Center and other destinations. Outside the town's core, Montreat should implement recommendations of the Wilderness Committee to provide better access and connectivity to the Wilderness Trails. And much like the volunteers of the Wilderness Committee who have faithfully maintained the Wilderness Trails, Montreat should encourage others in the community to 'take ownership' of the town's trails and facilities by 'adopting a pathway.'

## C. Parking Overview

An often overlooked component of the circulation network is the location and function of parking, especially when concentrated in large parking facilities or lots. As this plan has noted, Montreat suffers from seasonal congestion as visitors and residents vie for limited available parking. The community consensus seems to be that this seasonal (or sometimes even a Sunday) crush is annoying but bearable, and preferred to the construction of additional parking lots that would disrupt the community by impacting the environment and the image of Montreat. But the existing parking lots that serve students and visitors might be improved for parking and circulation by reconfiguring the surface area's striping pattern and using better signage to direct visitors to the destinations they seek.

The MRA, the college and the town have common parking concerns. One way to address parking concerns is to approach the issue cooperatively and collaboratively by encouraging joint ventures between public and private entities to build additional parking facilities. The town should permit and encourage 'table-top' parking that takes advantage of Montreat's steep topography (a brief definition of 'table-top' parking is provided on page 5).

The development of a satellite parking system with shuttles to bring students and visitors into Montreat would make more efficient use of the town's limited existing parking facilities and improve circulation by potentially removing some vehicles from roadways. In addition to the satellite parking, a town parking permit system would help manage traffic as well as raise revenue for the town's needs. In residential areas, the town should require sufficient off-street parking for homes and rental cottages to assure that parked vehicles will not be detrimental to traffic circulation or block access by emergency responders.

Lastly, all parking areas should be improved through the use of consistent signage that directs visitors to available parking, with better pedestrian access between parking structures and destinations, and enhanced mobility that encourages the use of multiple modes of transportation, especially in the Town Center. Improvements to pathways, greenways and bicycle facilities should all be integrated into the overall improvement plan for more efficient use of Montreat's limited parking

options.

## Summary of Traffic & Circulation Issues & Opportunities

- Maintenance of the road system is challenging due to its age, the town's topography, and the methods and materials used to construct the roads.
- Assembly Drive is the only way in and out of town.
- Some platted streets may be unnecessary or not possible to construct.
- Roadways, especially Assembly Drive, are congested in peak periods.
- Bike and pedestrian amenities are limited, especially between the town of Montreat and town of Black Mountain.
- The parking issue is seasonal but total supply is adequate even during peak periods.

## Recommendations & Implementation Strategies

**Vehicular Mobility Recommendation 1:** Maintain existing streets.

**Strategy 1:** Continue the program of street maintenance and upgrades of existing streets.

**Vehicular Mobility Recommendation 2:** Evaluate platted but non-built streets for abandonment if no future need is identified.

**Strategy 1:** Inventory all platted but non-built streets on a map.

**Strategy 2:** Rank all platted but non-built streets in decreasing order by usage so that future needs may be identified and priorities may be set for those roads which could be abandoned.

**Vehicular Mobility Recommendation 3:** Evaluate placing weight limits on streets to minimize the impacts of heavy vehicles, which can damage streets.

**Strategy 1:** Conduct a geotechnical study to evaluate the acceptable weight that the existing roads in the town could handle.

**Strategy 2:** Institute a permit system that is administered by the town which requires vehicles above the acceptable weight to be charged a fee to offset the maintenance cost associated with the wear and tear of roads from such traffic.

*Note: North Carolina code regulating motor vehicles allows municipalities to charge for trucks above a certain size and weight. Evaluation of the possibility of such enforcement might be worthwhile to assess the revenue it may generate.*

**Vehicular Mobility Recommendation 4:** Evaluate a vehicle permit system for all vehicles to offset street maintenance costs and manage peak flows.

**Strategy 1:** Conduct a vehicle count study to assess the actual peak flow during busy summer months and Sunday mornings.

*Note: This could be accomplished through some volunteering efforts to count all the vehicles that flow through the gates on a daily and weekly basis.*

**Strategy 2:** In collaboration with the MRA, Montreat College and the Presbyterian Church, and based on the vehicle count study, the town can evaluate the possibility of creating a permit system that charges a nominal fee for visitors' vehicles coming into Montreat on a daily or weekly basis.

**Vehicular Mobility Recommendation 5:** Evaluate street design to create features for transition, especially in the Town Center area.

**Strategy 1:** Identify key areas that lend themselves as transition points in the community, especially in areas of increased pedestrian activity to slow vehicular traffic.

*Note: One such area is by Lake Susan in front of Assembly Inn. As shown in Figure #10, the specialty paving of certain segments of streets in that vicinity could be integrated to indicate those transition points.*

**Vehicular Mobility Recommendation 6:** Decrease congestion by encouraging partnerships between the MRA, Montreat College and the Town of Black Mountain by utilizing Mountain Mobility or a shuttle service(s).

**Strategy 1:** Coordinate with Mountain Mobility and the Town of Black Mountain to establish shuttle services that will cater to visitors and residents during peak summer months and will provide alternatives to using personal automobiles.

**Non-Vehicular Mobility Recommendation 1:** Provide better mobility within the Town Center.

**Strategy 1:** Connect key destinations (such as Assembly Inn, Anderson Auditorium, and Montreat College) via a network of pedestrian linkages.

*Note: These pedestrian connections are shown on figures #7 and #10.*

**Non-Vehicular Mobility Recommendation 2:** Define, prioritize and construct an improved pedestrian network for the greater town area.

**Strategy 1:** To provide the greatest benefit, prioritize the trails that will need to be constructed according to the pedestrian network as detailed in Figure #7.

**Strategy 2:** Provide connections to the Black Mountain Trail along Assembly Drive by widening, improving and maintaining the existing path or by building six-foot to eight-foot pathways for hiking and biking along Flat Creek.

**Strategy 3:** Seek funding from potential national, state and private sources to aid with the design and construction of pathways and greenways throughout the planning area.

*Note: A list of potential funding sources are provided in Appendix I.*

**Strategy 4:** Coordinate with NCDOT and the Town of Black Mountain to explore a bike and pedestrian connection beyond Montreat's incorporated boundaries

*Note: There is a need to establish a connection for existing greenways and pathways beyond Montreat to Black Mountain as students, visitors and residents could utilize a safe and direct connection.*

**Non-Vehicular Mobility Recommendation 3:** Provide connections to the Wilderness Trails.

**Strategy 1:** Coordinate with the Wilderness Committee and consider its recommendations as to where the town should provide connections to the Wilderness Trails.

**Strategy 2:** Identify and prioritize connections to the Wilderness Trails.

**Non-Vehicular Mobility Recommendation 4:** Provide additional pedestrian and bicycle opportunities.

**Strategy 1:** Improve pedestrian and bicycle connectivity to residential neighborhoods, especially along Harmony Road, Lookout Road, and Assembly Drive, as these roads are major connections to existing neighborhoods.

**Non-Vehicular Mobility Recommendation 5:** Provide space for bicycle traffic along Assembly Drive.

**Strategy 1:** Evaluate the feasibility of a bike lane on the Assembly Drive by narrowing the vehicular lane. This will further slow the traffic on the Assembly Drive and make it safer.

**Note:** *It is not necessary that a bike lane symbol be painted on the bike lane.*

**Non-Vehicular Mobility Recommendation 6:** Provide conveniently located bike racks.

**Strategy 1:** Identify appropriate locations of bike racks, such as near Assembly Inn, near potential Plaza/Town Square, near Anderson Auditorium, and close to the larger dorms and educational facilities of Montreat College and work with the institutions to determine the most equitable sharing of the responsibilities for providing the racks.

**Note:** *Many amenities, big and small, such as benches and monuments, are dedicated by individuals who care about Montreat. Additional sources of funding could come from similar individuals who want to contribute by donating bike racks.*

**Non-Vehicular Mobility Recommendation 7:** Establish a fund devoted to pedestrian amenities.

**Strategy 1:** Identify pedestrian amenities such as benches, wayfinding signage, etc. that will promote a better walking environment and will encourage visitors and residents to make short trips on foot.

**Strategy 2:** Coordinate with the Land of Sky Council of Governments to identify various sources of funding that are available to offset funding for pedestrian amenities.

**Strategy 3:** Continue coordination with the various wilderness committees to identify sources of funding through private donations.

**Strategy 4:** Encourage the community to “take ownership” of nearby facilities by “adopting a pathway” to help offset some of the costs associated with the maintenance of pedestrian amenities.

**Parking Recommendation 1:** Reconfigure existing parking areas for improved efficiency.

**Strategy 1:** Conduct a study that will evaluate existing parking areas, and redesign them to achieve a higher number of parking spaces.

**Parking Recommendation 2:** Encourage joint ventures between public and private entities to build additional parking facilities.

**Strategy 1:** Identify projects, such as the building of student dormitories and other lodging, that could present opportunities to build additional parking which could be shared by public and private entities.

**Strategy 2:** Identify the means that would encourage private entities to build additional parking facilities in Montreat through the contribution of land or funds, incentives such as density bonuses or through the acceleration of the approval process.

**Parking Recommendation 3:** Permit and encourage “table-top” parking where feasible to take advantage of topography.

**Note:** *One such location where a “table-top” parking structure could be successful is shown in Figure 10 as “Infill Opportunity 2.”*

**Parking Recommendation 4:** Create a satellite parking system with shuttle service.

**Strategy 1:** Coordinate with the Town of Black Mountain to identify potential locations in the Town of Black Mountain that could be used for satellite parking during peak seasons.

*Note: Such coordination will require partnerships with the MRA and Montreat College. Some possibilities of satellite parking lots include church parking lots that are in Black Mountain, Montreat College-owned land in Black Mountain and other areas owned by the Town of Black Mountain.*

**Strategy 2:** Work with the MRA and Montreat College to establish a shuttle service shared by and supported by all three entities (See Vehicular Recommendation 6).

**Parking Recommendation 5:** Require adequate off-street parking in residential areas.

**Strategy 1:** In addition to the requirement for off-street parking based on the square footage of the residential unit, require off-street parking based on the number of bed-rooms, whichever is higher.

*Note: Currently, Montreat's ordinance requires up to four off-street parking spaces in residential areas. But since the trend in recent years is to build homes larger than those historically constructed in Montreat, the requirement of four spaces may not be enough.*

**Parking Recommendation 6:** Consider parking permits and parking fees to offset street maintenance costs.

**Strategy 1:** Assign parking permits to residents of Montreat for a nominal fee on a yearly basis.

**Strategy 2:** Charge parking fees from visitors on a daily and/or weekly basis.

*Note: This parking fee could be calculated by assessing the peak flow of vehicles, the cost associated with the maintenance of existing parking facilities and the contribution that town could make towards additional parking facilities such as new parking decks and satellite parking lots.*

**Parking Recommendation 7:** Improve pedestrian access between parking areas and destinations.

**Strategy 1:** Create pedestrian pathways that connect existing and future key buildings to existing and future major parking lots.

*Note: Some of the major connections are the parking lot in front of Anderson Auditorium that could be connected to the Assembly Inn, future parking decks either at the baseball site or the "Infill Opportunity 2" in Figure 10 that will need to be connected to Montreat College, Assembly Inn and other civic sites such as a potential future Town Hall in the town center.*

**Parking Recommendation 8:** Provide better signage to direct visitors to parking locations.

**Strategy 1:** Create signage at key locations, such as at the intersection of Lookout Road and Assembly Drive (as shown in Figure 10), that identifies the location of key buildings and places in Montreat and directs residents and visitors to nearby parking locations.

## 3.3.8 INFRASTRUCTURE

### Overview

Montreat has the responsibility for two current services and one emerging infrastructure service: public streets and water, and soon, stormwater. The town's street system has been previously discussed in the Traffic & Circulation section. The town's water system, originally developed and operated by the MRA, is dependent on a number of wells. Normally, these wells meet Montreat's daily water supply needs. However, on occasion, the town uses water supplied through an agreement with the Town of Black Mountain.

The major concern with the existing system deals with peak demands and the prospect of new development, the growth of Montreat College, and the expansion of programs offered by the MRA. It will be important for the town to secure and develop additional wells and storage tank sites to accommodate these new demands. Additional well sites have been set aside on the outskirts of the conservation easement, but wells are not permitted within the conservation easement unless conditions necessitate the water usage that could not be met by any other source. Sensitivity to clearing and grading, as governed by the conditions of the conservation easement, must be honored at these potential sites. The town should consider a fee structure for water use that reflects the cost of system expansion and the need to guard the limited supply of available water, discourages the unnecessary use of water (such as for irrigation), and captures the extra cost to provide a system for water usage in peak periods. Furthermore, the town should compare and evaluate the benefits to enhancing its water supply agreement with the Town of Black Mountain versus the costs and benefits of digging new wells and constructing new storage tanks.

The newly emerging stormwater management component is driven by the advent of new stormwater controls. These new controls, along with flood regulations, will require that Montreat takes a much more active role in development review and inspections to guarantee compliance, both during construction and following it. It is appropriate to fund such a 'utility' through a user fee system tied to the amount of impervious surface area. Owners who have larger amounts of impervious surface would pay a higher fee. These fees can then be used to offset administrative costs and fund capital improvements to the system.

### Summary of Infrastructure Issues & Opportunities

- Montreat is responsible for public streets, water and soon, stormwater services. This creates burden on town's ability to provide these services with limited budget.
- Lack of water supply, especially during peak period, needs to be addressed to respond to existing and future demand.

### Recommendations & Implementation Strategies

**Recommendation 1:** Although storage capacity is sufficient for current usage, identify and pursue additional well sites and storage facilities to meet future demand.

**Strategy 1:** Investigate the possibility of additional well locations within the conservation easement by discussing this situation with Southern Appalachian Highland Conservancy and the MRA.

**Recommendation 2:** Identify additional water sources needed to provide efficient flow and service for future fire emergencies.

**Strategy 1:** Determine the additional peak time capacity needed to handle future fire emergencies.

**Strategy 2:** Study the "build-out" scenario to determine peak demand or set limits on what may be built to limit future demand.

**Strategy 3:** Identify reasonable sources to best serve that demand and evaluate the feasibility of each option.

**Recommendation 3:** Require users who drive peak demand to offset the costs of an expanded system.

**Strategy 1:** Collaborate with the MRA and Montreat College to determine the impact on the water system during the peak season and identify the means to mitigate or offset costs of improvement.

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FIGURE # 6 *PLANNING AREA PLAN MAP*

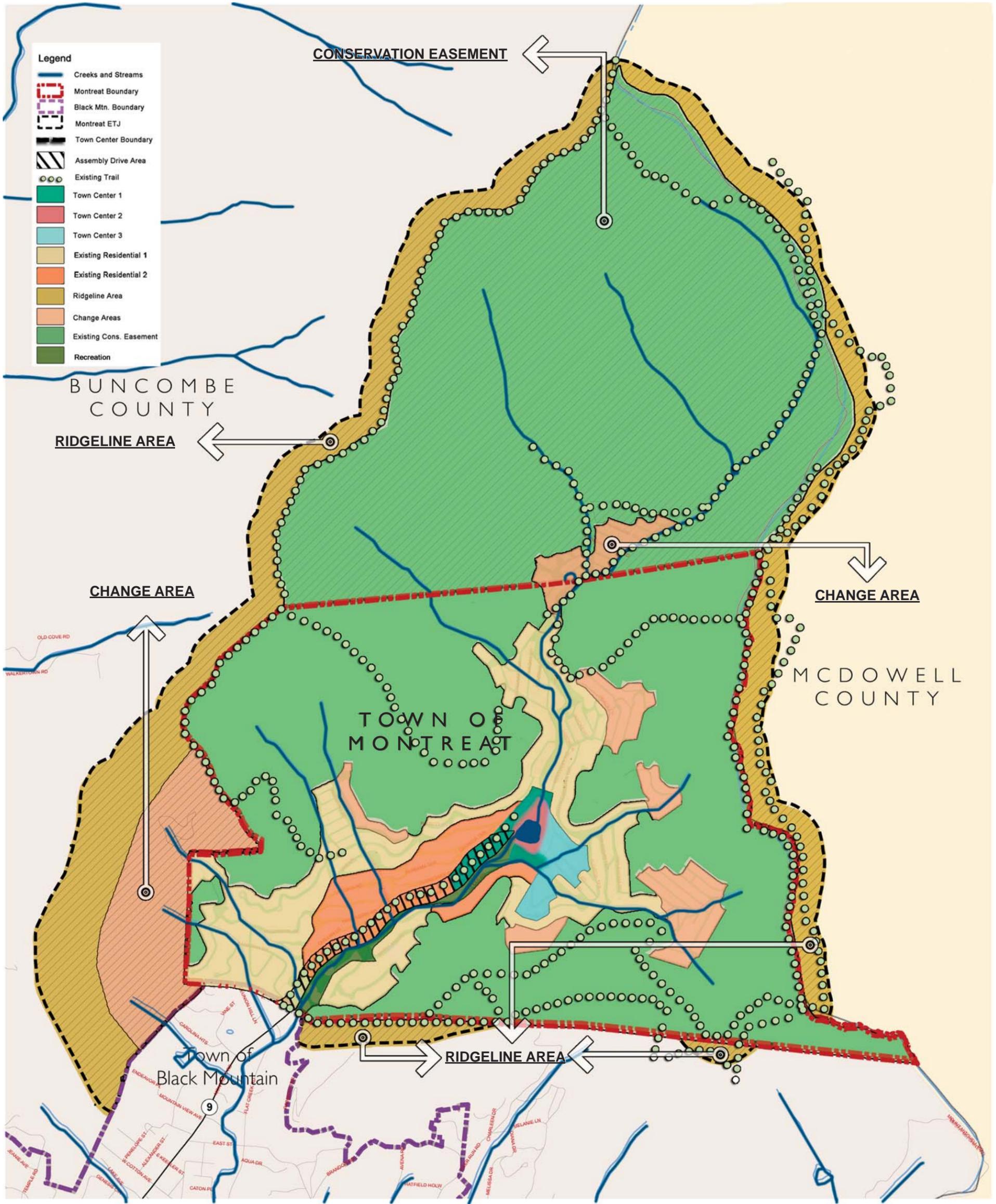


Figure #6  
 Montreat's Planning Area Plan  
 Comprehensive Plan  
 Town of Montreat, NC

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FIGURE # 7: *TOWN-WIDE PLAN MAP*

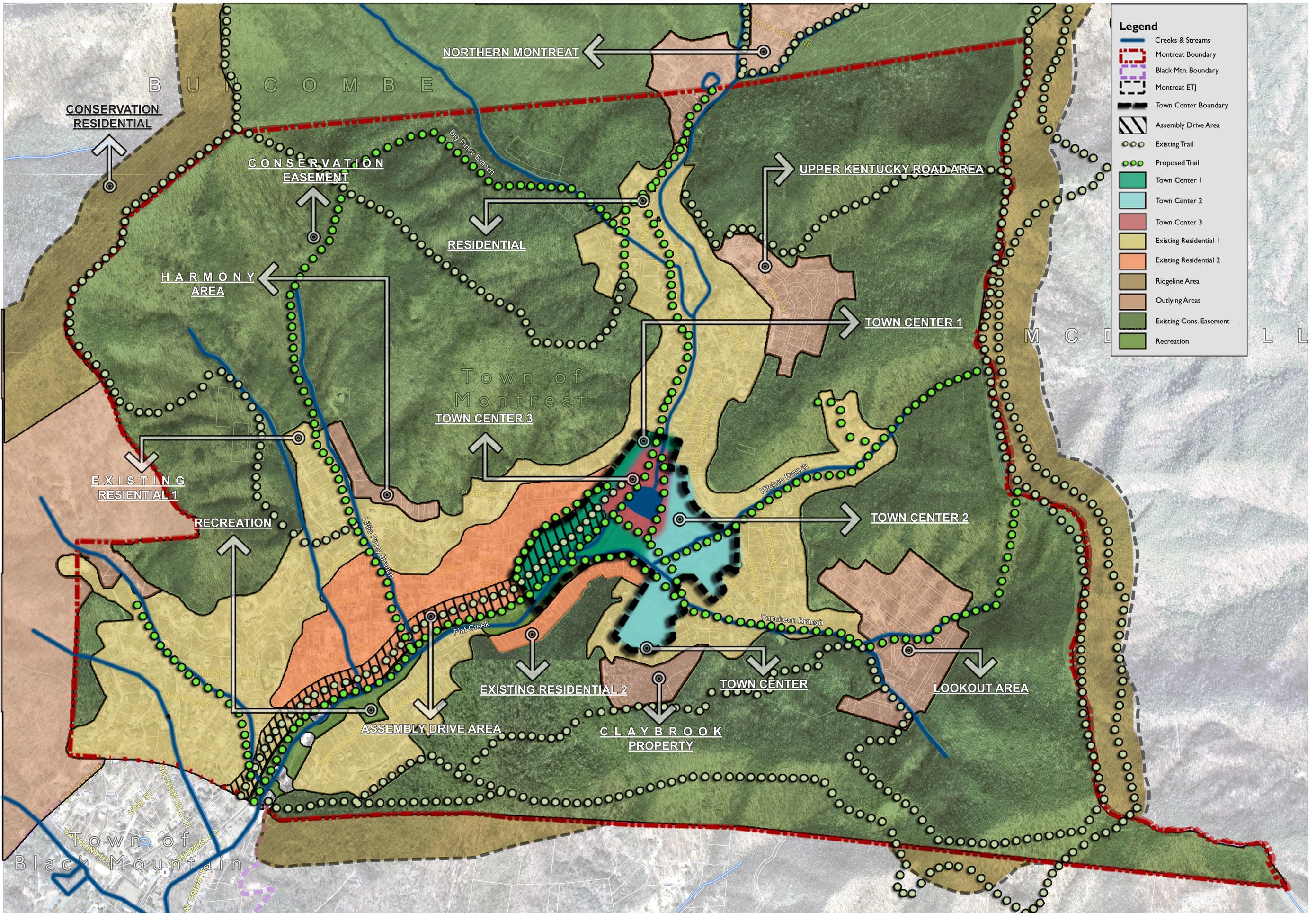


Figure #7  
 Proposed Town-Wide Plan  
 Comprehensive Plan  
 Town Of Montreat

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**FIGURE # 8A: CLAYBROOK  
CONVENTIONAL SUBDIVISION DESIGN  
SCENARIO**

**FIGURE # 8B: CLAYBROOK  
CONSERVATION DESIGN SCENARIO**

**FIGURE # 8C: CLAYBROOK CLUSTER  
DESIGN SCENARIO**



Figure # 8A  
 Conventional Subdivision Design Scenario  
 Comprehensive Plan  
 Montreat, NC

LandDesign

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Consultants for Planning, Zoning & Land Development

Figure # 8B  
Conservation Subdivision Design Scenario  
Comprehensive Plan  
Montreat, NC

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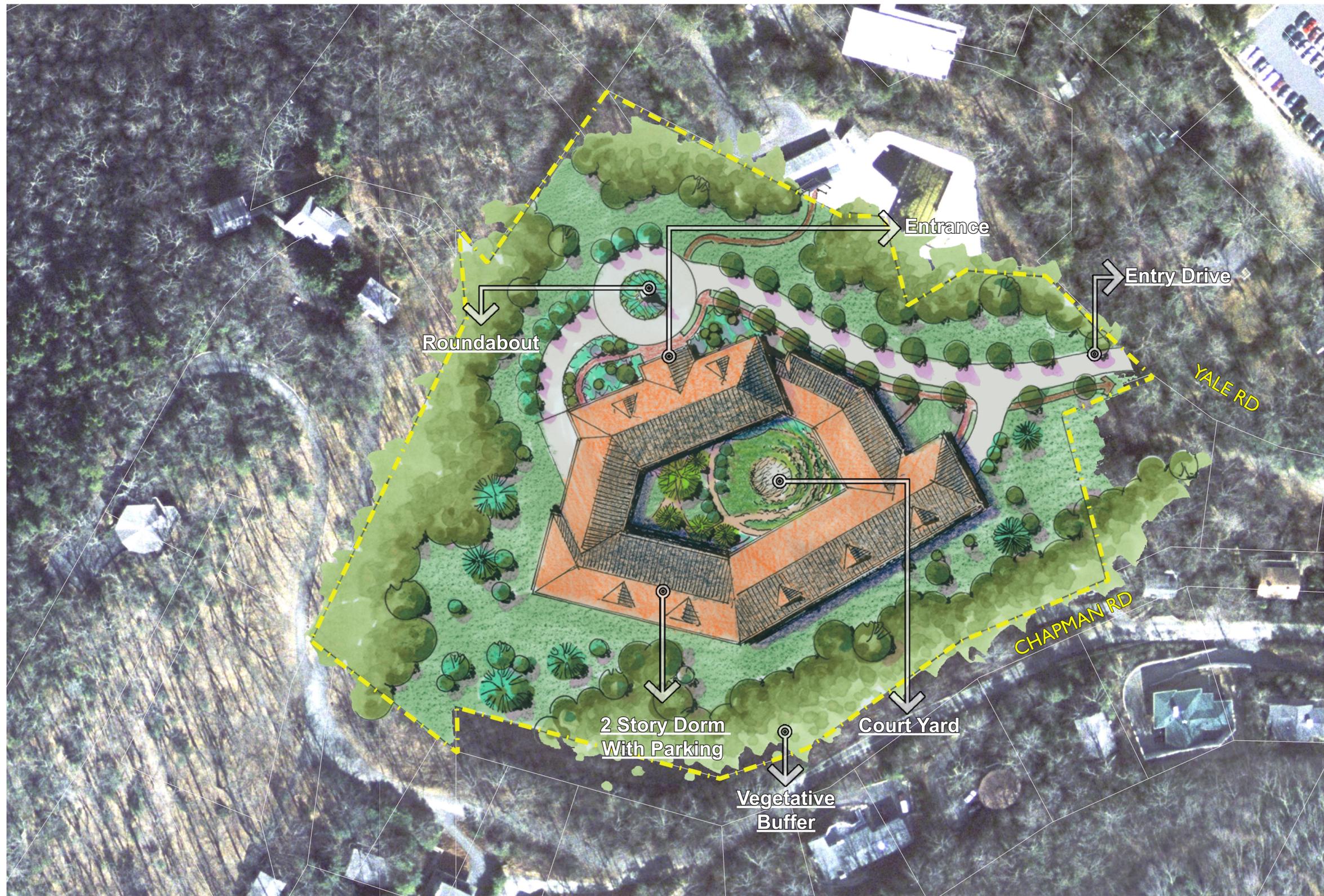
Figure # 8C  
 Cluster Design Scenario  
 Comprehensive Plan  
 Montreat, NC

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FIGURE # 9: *BASEBALL FIELD  
DESIGN SCENARIO*



COLLEGE HOUSING  
STUDENT & STAFF HOUSING



INSERT:

FIGURE # 10: *TOWN CENTRE  
DESIGN SCENARIO*

INSERT:

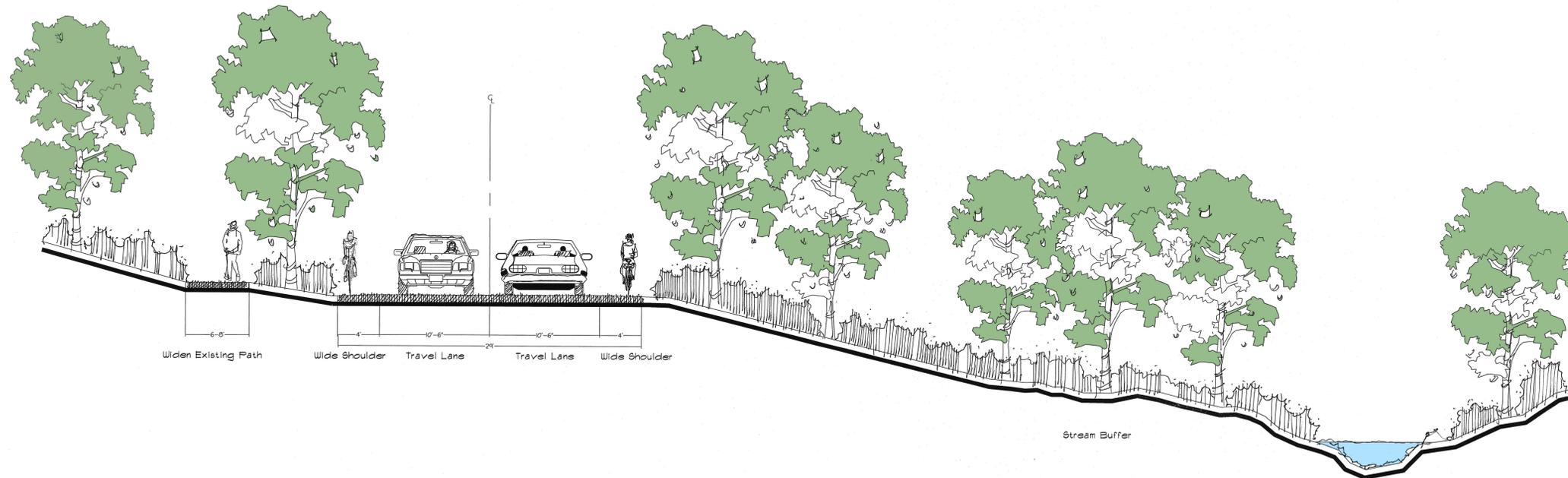
FIGURE # 11: *Assembly Drive  
Circulation Improvements*



A



B



C





APPENDICES

- APPENDIX A: 2006 Comprehensive Plan Community Survey Instrument
- APPENDIX B: 2006 Comprehensive Plan Community Survey Results
- APPENDIX C: List of Community Stakeholders Interviewed
- APPENDIX D: Government Taxes Authorized by Local Act of the General Assembly
- APPENDIX E: Sources of Revenue for Municipalities in North Carolina
- APPENDIX F: State-Collected Local Taxes: Basis of Distribution
- APPENDIX G: Design Standards Example 1
- APPENDIX H: Design Standards Example 2
- APPENDIX I: Funding Options for Greenways
- APPENDIX J: References

Appendices

# Town of Montreat, NC

## 2006 Comprehensive Plan Community Survey

The Town of Montreat is seeking public input for its 2006-07 Comprehensive Plan effort. We are asking for your assistance to help us plan for Montreat’s future over the next 20 years. This is a **very important** task that requires input and ideas from our town residents and property owners. In general, a comprehensive plan is a written document that identifies the goals, objectives, principles, policies, and standards for the protection, enhancement, growth and development of a town. It requires public participation from residents and property owners in order to accurately reflect local opinions on a variety of planning and growth issues. Your address has been used for mailing purposes only, your name will never be placed on the survey and you will not be identified in the study results.

In addition to conducting this community survey, we will be holding a series of public meetings to seek additional input for the comprehensive plan. You are cordially invited to attend the first public meeting scheduled for **October 13, 2006 from 2:00 – 4:00 pm** with an open house to preview maps starting @ 1:30 pm. The meeting will be located at Upper Anderson Auditorium. Please fold the completed survey and place it into the postage-paid return envelope and **return by October 20th, 2006.**

Thank you,

**The Comprehensive Plan Steering Committee (CPSC)**

<i>Matt Ashley, Chair</i>	<i>George Barber</i>	<i>Bob Headley</i>	<i>Bill Hollins</i>	<i>Ron Nalley, Staff</i>
<i>Don Reid</i>	<i>Linda Stroupe</i>	<i>Dan Struble</i>	<i>Nancy Hope</i>	

**The following statements are indicators of community feelings about current and future issues within the Town of Montreat. Please follow the directions provided for each set of questions.**

### Vision

Please indicate your level of agreement with each of the following statements. (Please circle your choice)

Statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1. The Town of Montreat should remain as unchanged as possible over the next twenty years.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
2. The Town of Montreat should maintain its existing “spiritual community” character.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
3. The Town of Montreat should make provisions to meet the housing needs of its citizens and institutions.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
4. The Town of Montreat should manage growth by providing standards and guidelines to protect its community character.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>

### Land Use and Community Character

Please indicate your level of agreement with each of the following statements. (Please circle your choice)

Statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
5. The Town of Montreat should remain mostly residential over the next 20 years.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
6. The Town of Montreat should accommodate and encourage a variety of services, such as restaurants, doctor’s offices and a grocery store within the Town Limits.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
7. The Town of Montreat should encourage all new development to fit with the Town’s existing character.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>

## **Natural Resources**

Please indicate your level of agreement with each of the following statements. (Please circle your choice)

<b>Statement</b>	<b>Strongly Disagree</b>	<b>Disagree</b>	<b>Neutral</b>	<b>Agree</b>	<b>Strongly Agree</b>
8. Current federal, state, county, and town regulations are adequately protecting the natural resources of the town.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
9. The Town of Montreat should develop stronger regulations to protect the natural appearance of the ridgelines.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
10. The Town of Montreat should develop stronger regulations for storm water runoff and erosion and sediment control.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
11. The Town of Montreat needs to acquire and conserve more open space.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>

**12. Would you be willing to pay additional tax dollars and fees for open space acquisition and protection?**

Yes  No  Undecided

## **Housing**

Please indicate your level of agreement with each of the following statements. (Please circle your choice)

<b>Statement</b>	<b>Strongly Disagree</b>	<b>Disagree</b>	<b>Neutral</b>	<b>Agree</b>	<b>Strongly Agree</b>
13. The Town of Montreat should encourage a variety of housing choices, particularly those that provide for temporary lodging.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
14. The Town of Montreat should encourage a mix of seasonal lodging for students, volunteers and staff.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
15. The Town of Montreat should encourage a mix of permanent housing for retirees and ministers.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
16. Guidelines should be crafted that encourage environmental sensitivity for home site development.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>

## **Development and Growth**

Please indicate your level of agreement with each of the following statements. (Please circle your choice)

<b>Statement</b>	<b>Strongly Disagree</b>	<b>Disagree</b>	<b>Neutral</b>	<b>Agree</b>	<b>Strongly Agree</b>
17. The Town of Montreat should allow commercial development in key or central areas.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
18. New guidelines should be developed that limit impacts on the environment and steep slopes areas.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
19. New development should have limited impact on views.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
20. The Town of Montreat should develop historic design guidelines.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
21. The Town of Montreat should encourage underground utility installations.	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>
22. The Town of Montreat should require developers and single home builders to help pay their fair share for needed public infrastructure (roads, utilities etc.).	<b>SD</b>	<b>D</b>	<b>N</b>	<b>A</b>	<b>SA</b>

Statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
23. The operations of the College have significantly reduced the capacities of town services and infrastructure.	SD	D	N	A	SA
24. The operations of the Mountain Retreat Association have significantly reduced the capacities of town services and infrastructure.	SD	D	N	A	SA
25. The Town of Montreat should plan for and encourage future growth of the Mountain Retreat Association.	SD	D	N	A	SA
26. The Town of Montreat should plan for and encourage the future growth of the College.	SD	D	N	A	SA
27. The Town of Montreat should consider expanding services into the undeveloped areas of the Extra Territorial Jurisdiction (ETJ).	SD	D	N	A	SA

**28. Would you be willing to pay additional tax dollars and fees for more Town staff to oversee building and development inspection and enforcement?**

Yes  No  Undecided

## **Development Types**

**Please rate your support or opposition to various types of potential development within Montreat.**  
*(Please check your choice for each development type)*

Types of Development	Strongly Oppose	Somewhat Oppose	Somewhat Favor	Strongly Favor	No Opinion
29. Single Family Homes	<input type="checkbox"/>				
30. Large Estate Homes	<input type="checkbox"/>				
31. Retirement Homes	<input type="checkbox"/>				
32. Lodging/Rental Housing in Residential Areas	<input type="checkbox"/>				
33. Hotels, Motels and Bed and Breakfasts	<input type="checkbox"/>				
34. Health Care Facilities	<input type="checkbox"/>				
35. Student Housing	<input type="checkbox"/>				
36. Condos and Townhouses	<input type="checkbox"/>				
37. Apartments	<input type="checkbox"/>				
38. Mobile/Modular Homes	<input type="checkbox"/>				
39. Assisted Living/Nursing Homes	<input type="checkbox"/>				
40. Small Shops (Retail and Commercial)	<input type="checkbox"/>				
41. Restaurants	<input type="checkbox"/>				
42. Park and Recreation Areas/Facilities	<input type="checkbox"/>				
43. Open Space	<input type="checkbox"/>				
44. Education/Institutional Facilities	<input type="checkbox"/>				
45. Cultural Facilities	<input type="checkbox"/>				

# Transportation

Please indicate your level of agreement with each of the following statements. *(Please circle your choice)*

Statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
46. Overall, The Town of Montreat is currently a safe place to walk and bicycle.	SD	D	N	A	SA
47. The Town of Montreat should build sidewalks.	SD	D	N	A	SA
48. The Town of Montreat should build multi-purpose trails.	SD	D	N	A	SA
49. The Town of Montreat only needs additional parking during summer months.	SD	D	N	A	SA
50. The Town of Montreat needs a satellite parking lot for conference center visitors and students located outside of the Town.	SD	D	N	A	SA
51. The Town of Montreat should explore the needs for a parking structure.	SD	D	N	A	SA
52. Parking management is more important than additional parking spaces.	SD	D	N	A	SA
53. The existing public transit service offered is adequate.	SD	D	N	A	SA

**54. Would you be willing to pay additional tax dollars and fees for sidewalks and multi-purpose trails?**

- Yes  No  Undecided

**55. Would you be willing to pay additional tax dollars and fees for improved streets and additional public parking?**

- Yes  No  Undecided

**56. Which of the following do you think the Town should investigate as alternative revenue sources?  
(Please check all that apply)**

- Bonds
- User Fees
- Impact Fees
- Donations, etc.
- Grants
- Developer Contributions
- Other \_\_\_\_\_

**57. What are Montreat's 3 greatest strengths and weaknesses?**

- Strengths**
1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_

- Weakness**
1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_

58. What do you feel is the single biggest issue facing Montreat over the next several years?

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59. Please briefly describe your vision of what Montreat should be twenty years from now?

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60. Gender

- Male
- Female

61. Are you a full time resident of the Town of Montreat

- Yes
- No

62. Age

- 18 & under
- 19-29
- 30-39
- 40-49
- 50-59
- 60-69
- 70+

63. What is your employment status?

- Full Time
- Part Time
- Retired
- Homemaker
- Disabled
- Unemployed
- Student
- Self-Employed/Home Office Business
- Other\_\_\_\_\_

64. If you live in the Town of Montreat full time, how many school age children do you have?

\_\_\_\_\_ #

65. Please indicate which of the following applies to you. (Check all that apply)

- Registered voter in Montreat
- Taxpayer in Montreat
- Primary residence outside of Montreat
- Owner of residential land w/ structure in Montreat
- Owner of vacant land in Montreat
- Business owner in Montreat
- Renter in Montreat
- Student/Faculty Resident in Montreat

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Please fold the completed survey and place it into the postage-paid return envelope and return by October 20th, 2006. If you have any questions about this survey please call Ron Nalley @ (828) 669-8002.

Please join us for our first public meeting on:  
**October 13<sup>th</sup> 2:00 pm at the Upper Anderson Auditorium**

The tentative date for the second public meeting is Tuesday, Jan 2<sup>nd</sup> 11:00 am -1:00 pm (lunch included) at the Upper Anderson Auditorium.

**Thank you,**

**The Comprehensive Plan Steering Committee (CPSC)**

*Matt Ashley, Chair*  
*Don Reid*

*George Barber*  
*Linda Stroupe*

*Bob Headley*  
*Dan Struble*

*Bill Hollins*  
*Nancy Hope*

*Ron Nalley, Staff*

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**Additional Comments and Suggestions**

**Please Return to:**  
**Town of Montreat**  
**96 Rainbow Terrace**  
**PO Box 423**  
**Montreat, NC 28757.**

**APPENDIX B**

*The Town of Montreat, NC*

*Comprehensive Plan Survey Results*

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December 1, 2006

**Prepared for:**

The Town of Montreat, NC

**Prepared by:  
LandDesign Inc.**

## **Background**

During September and October of 2006, the Town of Montreat administered a community wide Comprehensive Plan household survey to all Montreat property owners. The survey questionnaire was jointly developed by Town staff, the consultant and modified by Town staff and the Comprehensive Plan Steering Committee (CPSC). The survey objectives were to:

- 1. To gain public information to help inform the Comprehensive Plan process.*
- 2. Benchmark of attitudes and perceptions regarding a variety of key town issues.*
- 3. Input on ideas for future facilities and services.*
- 4. Establishment of baseline measurements for comparison in future surveys.*

## **Method**

The comprehensive plan survey was delivered to all Montreat property owners via US mail. Each survey package contained a three page double sided survey questionnaire as well as a return postage paid envelope.

## **Response Rate**

The Town received 373 completed questionnaires out of 728 survey mailers. This represents a response rate of approximately 51.2 percent at the 95 percent confidence level with a margin of error of plus-or-minus 3.55 percentage points. Background information gathered from the respondents was highly reflective of the town's resident and non-resident composition.

- Out of the 373 total responses approximately 102 (27.5%) were full-time residents.
- Over 87.6% of the respondents were over the age of 50.
- 30% of the respondents work full-time while 40% are retired.

## **Highlights**

Overall the survey results were very consistent across the board. A large majority of the questions resulted in high levels of agreement. There were 26 questions that resulted in an agreement level over 70%. Any result depicting 70% or higher levels of agreement can be identified as a strong directional indicator. The surveys results also yielded a high number of write in comments for various qualitative questions.

The following section is a brief overview of the questions and related responses that received the highest levels of overall agreement. Detailed survey results can be found in the following pages which include the survey instrument, statistical breakdown of each question and write in comments received from the respondents.

### ***Vision***

Vision questions yielded high overall agreement/disagreement levels for the following topics:

- Maintain existing spiritual character (91%)
- Should manage growth (91%)
- Remain as unchanged as possible – place (75%)

### ***Land Use & Community Character***

Land Use and Community Character questions yielded very high agreement levels for the following topics:

- Remain mostly residential (95.4%)
- The Town should **not** accommodate a variety of services (83%)
- Encourage development to fit within the Town's existing character (88%)

### ***Natural Resources***

The natural resources questions yielded very high agreement levels for the following topics:

- Stronger develop regulations for ridgeline protection (77%)
- Stronger regulations for storm water runoff (69%)

### ***Housing***

The housing questions yielded very high agreement/disagreement levels for the following topics:

- Encourage guidelines for environmental sensitivity for home site development (85%)

### ***Development and Growth***

The development and growth questions yielded very high agreement/disagreement levels for the following topics:

- New development should have limited impact on views. (85%)
- Encourage underground utility installations (82%)
- Should **not** allow commercial development in key areas (80%)
- New guidelines that limit impacts on the environment and steep slope areas (79%)
- Require developers and single home builders to pay their share for needed infrastructure. (78.8%)

### ***Development Types***

The development type questions yielded very high favorable/opposition levels for the following topics:

#### **Most Favored Types of Development (over 70%)**

<u>Development Type</u>	<u>Somewhat and Strongly Favored Combined Score</u>
Single Family Homes	85%
Park and Recreation Areas	76%

Open Space 83%

**Most Opposed Types of Development (over 70%)**

<u>Development Type</u>	<u>Somewhat and Strongly Opposed Combined Score</u>
Mobile Homes	95%
Apartments	82%
Hotels, Motels and Bed and Breakfasts	82%
Large Estate Homes	78%
Assisted Living/Nursing Homes	77%
Condos and Townhouses	77%
Small Shops	75%
Restaurants	75%

***Transportation***

The transportation questions yielded very high agreement/disagreement levels for the following topics:

- Montreat is a safe place to walk and bicycle (76%)
- The Town only needs additional parking during the summer months (71%)

## APPENDIX C

### *List of Community Stakeholders*

Key stakeholders who represented a variety of interests and, more importantly, deal on a regular basis with one or more aspects of the issues addressed by the comprehensive plan were interviewed early in the planning process. The input gathered from these individuals aided the process by providing an additional layer of information that cannot be gleaned from reports, observations in the field or data analysis. Furthermore, their input complements the input received from the public and the Comprehensive Plan Steering Committee. Their involvement in the planning process is gratefully acknowledged.

Matt Ashley, *Montreat Presbyterian Church*  
George Barber, *MRA*  
Joel Barker, *Montreat Presbyterian Church*  
Peter Boggs, *Montreat Cottagers*  
Edward Brouwer, *Montreat Presbyterian Church*  
Charlie Caldwell, *Public Works Department*  
Chip Craig, *Town Commissioner*  
Ruth Currie, *Town Commissioner*  
Al Edwards, *Montreat College*  
Jim Field, *Planning Board*  
Rusty Frank, *Parks and Recreation Committee*  
Kim Hayes, *Parks and Recreation Committee*  
Jim Henderson, *Planning Board*  
Jerone Herring, *Planning Board*  
Fred Holder, *MRA Wilderness Committee / Parks and Recreation Committee*  
Jean Holder, *MRA Wilderness Committee*  
Bill Hollins, *Town Commissioner*  
Jane Holt, *MRA Wilderness Committee*  
Sam Hope, *Parks and Recreation Committee*  
Charles Mitchell, *Planning Board*  
Ron Nalley, *Town Administrator*  
Eric Nichols, *Town Commissioner*  
Dottie Shuman, *Parks and Recreation Committee*  
Richard Sills, *CFO, MRA*  
Frank Spencer, *MRA Planning Committee*  
Linda Stroupe, *Planning Board*  
Dan Struble, *Montreat College*  
O'Neil Tate, *Town Commissioner*  
Letta Jean Taylor, *Mayor*  
Martha Teeters, *Planning Board*  
Ann Walker, *Montreat Cottagers*  
Perrin Wright, *Montreat Cottagers*



North Carolina Association  
of County Commissioners

North Carolina League of  
Municipalities



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**LOCAL GOVERNMENT TAXES AUTHORIZED  
BY LOCAL ACT OF THE GENERAL ASSEMBLY**  
Current through 2006 Session

**ADMISSIONS TAX**

Greensboro SL 1989-383

**FURNITURE SHOWROOM TAX**

High Point SL 2001-11

**IMPACT/FACILITY FEES**

Carrboro SL 1985-357  
Cary SL 1987-801  
Catawba County SL 1987-1021  
Chatham County SL 1987-460  
Dunn SL 1991-660  
Durham SL 1987-802; SL 1989-476, SL 1991-992  
Garner SL 1989-608; SL 1993-601  
Hickory SL 1987-705  
Kill Devil Hills SL 1985-536; SL 1987-258; SL 1987-986; SL 1987-987; SL 1987-988;  
SL 1989-469  
Kitty Hawk SL 1985-536; SL 1987-258; SL 1987-986; SL 1987-987; SL 1987-988;  
SL 1989-469  
Knightdale SL 1987-668; SL 1989-430  
Manteo SL 1985-536; SL 1987-258; SL 1987-986; SL 1987-987; SL 1987-988;  
SL 1989-469  
Nags Head SL 1985-536; SL 1987-258; SL 1987-986; SL 1987-987; SL 1987-988;  
SL 1989-469  
Orange County SL 1987-460; SL 1989-324  
Pittsboro SL 1987-460  
Raleigh SL 1985-498; SL 1987-514  
Rolesville SL 1987-996  
Southern Pines SL 1989-607  
Southern Shores SL 1985-536; SL 1987-258; SL 1987-986; SL 1987-987  
Wake Forest SL 1989-502  
Zebulon SL 1987-668

## LAND TRANSFER TAX

Camden County	SL 1985-954
Chowan County	SL 1985-881
Currituck County	SL 1985-670
Dare County	SL 1985-525; SL 2001-394
Pasquotank County	SL 1989-393
Perquimans County	SL 1989-393
Washington County	SL 1989-393

## MOTOR VEHICLE FEE

Fee for the use of vehicles within the municipal jurisdiction:

Bald Head Island	SL 2002-129
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## MOTOR VEHICLE LICENSE TAX

Cities that have obtained local acts of the General Assembly allowing them to charge amounts other than the \$5 general authorization in G.S. 20-97(b):

<u>City</u>	<u>Session Law</u>	<u>Per Vehicle</u>
Ahoskie	1989-893	\$10.00
Black Mountain	2005-306	\$5.00 for public transp.
Cabarrus Co. cities	2005-116	\$20.00
Carrboro	1991-392; 1993-456; 1995-339; 2005-306	\$25.00
Cary	1993-325	\$10.00
Chapel Hill	1991-392; 1993-456; 1995-339	\$15.00
Charlotte	1985-1009; 1991-209; 1993-345	\$30.00
Cornelius	1985-1009	\$20.00
Creedmoor	1987-610	\$10.00
Davidson	1985-1009	\$20.00
Durham	2003-329; 2004-103	\$10.00
Gastonia	1989-1016; 1991-557	\$15.00
Greensboro	1991-31	\$10.00
Greenville	1993-200	\$20.00
Henderson	1987-1066	\$10.00
Hillsborough	1991-822	\$10.00
Huntersville	1985-1009	\$20.00
Kinston	1991-838	\$15.00
Matthews	1985-1009; 1993-345	\$30.00
Mint Hill	1985-1009	\$20.00
Murfreesboro	1987-953	\$20.00
Oxford	1987-610	\$10.00
Pineville	1985-1009	\$20.00
Raleigh	1987-998; 1991-229	\$15.00
Roxboro	1997-282 (City Charter § 8.1)	\$10.00
Roanoke-Rapids	1995-34	\$6.00
Winston-Salem	1993-56; 2005-278	\$20.00

\*Note that cities that operate a public transportation system may levy an additional \$5 per year municipal vehicle tax for public transportation purposes under G.S. 20-97(c).

## OCCUPANCY TAXES

Ahoskie	SL 2006-164
Alamance County	SL 1987-950
Albemarle	SL 1991-915
Alleghany County	SL 1991-162; SL 2004-106
Anson County	SL 2001-434
Ashe County	SL 1991-163
Avery County	SL 1993-472; SL 1997-410; SL 2001-439
Avery Co. municipalities (those not otherwise authorized)	SL 2001-439; SL 2002-94
Bald Head Island	SL 1991-664; SL 1993-617
Banner Elk	SL 1989-318; SL 1993-428; SL 2000-103; SL 2002-94
Beech Mountain	SL 1987-376; SL 2001-434; SL 2001-439; SL 2002-94
Beech Mountain Dist. W	SL 2001-434
Belmont	SL 2005-220
Benson	SL 2006-120
Blowing Rock	SL 1987-171; 2003-281
Boiling Springs	SL 2006-120
Boone	SL 1987-170
Brunswick County	SL 1997-364
Buncombe County	SL 1983-908; SL 1985-942; SL 2001-162
Burgaw	SL 2006-167
Burke County	SL 1989-422; SL 1995-143
Cabarrus County	SL 1989-658; SL 2001-439
Caldwell County	SL 1987-472
Camden County	SL 2004-120
Carolina Beach	SL 2002-138
Carrboro	SL 2001-439
Carteret County	SL 1987-375; SL 1989-171; SL 2001-381; SL 2005-120
Cary	SL 1989-874
Caswell Beach	SL 1991-664; SL 1997-364
Chapel Hill	SL 1987-460
Cherokee County	SL 1983-1055
Chowan County	SL 1989-174; SL 2006-129
Clay County	SL 1985-969; SL 1987-118; SL 1987-195; SL 2006-120
Cleveland County	SL 1989-173
Columbus County	SL 1995-530; SL 1995-540
Columbus	SL 1991-632
Conover	SL 1985-929; SL 1987-172; SL 1987-319
Craven County	SL 1995-721; SL 1996-20 (Ex Sess)
Craven County	SL 1983-980; SL 1999-286
Cumberland County	SL 1983-983; SL 2001-348
Currituck County	SL 1987-209; SL 1991-155; SL 1999-155; SL 2004-95
Dare County	SL 1985-449; SL 1985-826; SL 1991-177; SL 1991-906; SL 2001-439

Davie County	SL 1989-928
Dobson	SL 2006-118
Duplin County	SL 1987-317; SL 2005-53
Durham County	SL 1985-969; SL 1991-665; SL 2001-480; SL 2005-233; SL 2006-98
Eden	SL 2005-233
Elizabeth City	SL 1987-175; SL 2005-16
Elkin	SL 2006-118
Forsyth County	SL 1983-908; SL 1985-942; SL 1989-870; SL 1997-408
Franklin	SL 2004-105
Franklin County	SL 2005-233
Garner	SL 1989-660
Gaston County	SL 1987-618; SL 1991-49; SL 1995-172
Gastonia	SL 2001-439
Goldsboro	SL 1985-929; SL 1987-172; SL 1987-319; SL 1991-555; SL 1997-447
Graham County	SL 1985-969; SL 1987-118; SL 1987-195
Granville County	SL 1993-454; SL 2000-380
Greensboro	SL 1991-22; SL 1995-380; SL 1995-540; SL 1999-302
Guilford County	SL 1983-988; SL 1989-39; SL 1991-93
Halifax County	SL 1987-377; SL 2005-46; SL 2006-120; SL 2006-164
Harnett County	SL 1987-142; SL 2001-439
Haywood County	SL 1983-908; SL 1985-942; SL 1987-48; SL 1995-540
Henderson County	SL 1985-962, SL 1987-172; SL 1991-55
Hendersonville	SL 1985-929, SL 1987-172
Hertford	SL 1987-979
Hickory	SL 1985-929; SL 1987-172; SL 1987-319
High Point	SL 2001-11
Holden Beach	SL 1987-963; SL 1997-364
Hyde Co.	SL 1991-230; SL 1991-806; SL 2006-128
Iredell County	SL 1985-570
Jackson County	SL 1985-969; SL 1987-118; SL 1987-195
Johnston County	SL 1987-647
Jonesville	SL 2002-95
Kenly	SL 2006-120
Kings Mountain	SL 2001-439
Kinston	SL 1993-648
Kure Beach	SL 2002-138
Lee County	SL 1987-538
Lenoir County	SL 1987-561; SL 1989-576; SL 1989-770; SL 1991-76
Lexington	SL 1993-602; SL 2001-365
Lincoln County	SL 1993-549
Lincolnton	SL 2001-439
Long Beach	SL 1983-908; SL 1983-985; SL 1983-1028; SL 1987-935; SL 1989-857; SL 1998-207
Lumberton	SL 1983-1028; SL 1987-935; SL 1997-447
Macon County	SL 1985-969; SL 1987-118; SL 1987-195
Madison County	SL 1997-102; SL 2005-118
Martin County	SL 1991-80; SL 2006-127
McDowell County	SL 1985-892

Mecklenburg County	SL 1983-908; SL 1989-821; SL 1989-922; SL 2001-402; SL 2005-68; SL 2005-276
Mitchell County	SL 1987-141
Monroe	SL 2001-439
Montgomery County	SL 2001-434
Moore County	SL 1987-188
Mooresville	SL 1991-296; SL 1991-577; SL 1999-258
Mount Airy	SL 1997-410; SL 2001-7; 2003-281
Nash County	SL 1987-32; SL 1993-545; SL 1997-255; SL 2001-349
New Hanover County	SL 1983-908; SL 1983-987; SL 1985-971; SL 1995-540; SL 2002-138; SL 2003-166; SL 2006-167
North Topsail Beach	SL 2001-439
Ocean Isle Beach	SL 1983-908; SL 1997-364
Ocracoke Township	SL 2006-128
Onslow County	SL 1985-857
Orange County	SL 1991-392
Oriental	SL 1993-695
Pasquotank County	SL 1987-175; SL 2005-16
Pender County	SL 1987-970; SL 2001-439
Person County	SL 1997-364
Pilot Mountain	SL 2006-118
Pitt County	SL 1987-143; SL 1993-410
Polk County	SL 1985-969
Raleigh	SL 1985-850
Reidsville	SL 2005-233
Richmond County	SL 1987-969; SL 2001-439
Roanoke Rapids	SL 2005-46
Rockingham County	SL 1991-322
Rowan County	SL 1987-379; SL 1991-882; SL 2001-439
Rowland	SL 1991-154
Rutherford County	SL 1991-577
Saint Pauls	SL 1998-112; SL 2006-34
Scotland County	SL 1997-410
Selma	SL 2001-439
Shalotte	SL 1997-364
Shelby	SL 1997-447
Smithfield	SL 2001-439
Southport	SL 1989-639; SL 2002-129
Stanly County	SL 2001-434
Statesville	SL 1985-570, SL 1987-930; SL 1998-112
Sunset Beach	SL 1987-956; SL 1997-364
Surf City	SL 1983-908
Swain County	SL 1985-923
Thomasville	SL 1993-453
Topsail Beach	SL 1983-908
Transylvania County	SL 1985-969; SL 1999-205; SL 2005-88
Troutman	SL 2005-220
Tryon	SL 2006-148
Tyrrell County	SL 2001-468

Vance County	SL 1987-1067; SL 2001-321
Wake County	SL 1985-850; SL 1991-594; SL 1995-458
Wake Forest	SL 1989-604
Washington County	SL 1991-821; SL 2001-305
Washington	SL 1991-158; SL 2001-365
Watauga County Dist. U	SL 2005-197
West Jefferson	SL 2005-49
Wilkesboro	SL 2001-439
Wilmington	SL 2002-139; SL 2006-167
Wilson County	SL 1987-484
Wrightsville Beach	SL 2002-138
Yancey County	SL 1987-140
Yaupon Beach	SL 1991-820; SL 1997-364

### **PREPARED FOOD & BEVERAGE TAX**

Cumberland County	SL 1993-413; SL 2001-347
Dare County	SL 1991-177; SL 2001-347; SL 2002-141
Hillsborough	SL 1993-449; SL 1999-304; SL 2001-347
Mecklenburg County	SL 1989-821; SL 1989-922; SL 2001-347; SL 2001-402
Monroe	SL 2005-261; SL 2006-171
Wake County	SL 1991-594; SL 1995-458; SL 2001-347

### **SALES TAX**

Dare County	SL 2004-123	1 cent, beach nourishment, no referendum, 8 years
Gaston County	SL 2004-122	½ cent, economic development/tourism, referendum, 8 years
Mecklenburg County	SL 1997-417	½ cent, public transportation, referendum, no expiration

## **Sources of Revenue for Municipalities in North Carolina**

### **Property Taxes –**

Collection of current and prior year tax levies

Interest on delinquent taxes

Late listing penalties and other costs of collecting delinquent taxes

### **Utilities**

Water and sewer sales

Electric power sales

Natural gas sales

Tap, connection and and reconnection fees, penalties and interest charges

### **Sales Taxes**

One percent Local Government Sales Tax - One percent sales tax imposed by County Governments is collected and administered by the State. The distribution of the tax is on a point of delivery basis back to the Counties. The County then divides the proceeds among the County and its municipal governments. The method of distribution by the County can be either on a population basis or an ad valorem basis. Counties are allowed to change the method of distribution every April.

Supplemental ½ Percent Local Government Sales Tax and Additional ½ Percent Local Government Sales Tax – A ½ percent sales tax levied by County Governments which is also collected and administered by the State. However, this tax is distributed back to Counties on a per capita basis (not a point of delivery basis). The distribution of the funds among the county and its municipalities is under the same formula selected for use in that county for the original sales tax.

Third ½ Percent Local Government Sales Tax - An additional ½ percent sales tax levied by County Governments which is collected and administered by the State. Half of the proceeds of the additional local option tax is to be distributed to the counties on a per capita basis and half on a point of delivery basis. Distribution between the taxing county and municipalities within the county is on the same basis as the one percent sales tax.

Two Percent Local Government Sales Tax on Food –State distribution to municipalities of local sales taxes on food

Local Government Public Transportation Sales Tax - applies only to Mecklenburg County

**Sales and Services**

Parking revenues

Rents and royalties

Airport revenues

Fire protection charges

Solid waste charges

Ambulance and rescue squad charges

Cemetery revenues

Recreation service revenues

Library service revenues

Other cultural and recreational service revenues

Mass transit revenues

**Intergovernmental**

Federal, state and local assistance including payments in lieu of taxes

Equitable sharing of federally forfeited property

Categorical grants (see attached list of grants)

Controlled substance tax

Intangibles tax received from the State

Distributions of utility franchise taxes, beer and wine tax and Powell Bill funds

Food stamp purchases tax reimbursements

Manufacturers and retailers and wholesalers inventory tax

Piped Natural Gas Excise Tax

Telecommunications Sales Tax

**Debt Proceeds**

Proceeds from the sale of bonds and notes excluding any bond anticipation notes that were sold but redeemed by the sale of new bonds

Proceeds of lease-purchase agreements

**Miscellaneous**

Collections of taxes from special tax districts

Animal taxes

Privilege licenses

Motor vehicle licenses and other licenses

911 charges

Building and other permits

Inspection fees

Investment earnings

Special assessments

Private contributions and donations

Sales of materials, fixed assets and real property

Non-government contributions for streets and traffic signals

ABC Board distributions

**Additional Taxes**

Subject to the approval of a local act, municipalities can levy:

occupancy taxes

prepared food and beverage taxes

# State-Collected Local Taxes: Basis of Distribution

PREPARED BY THE NORTH CAROLINA LEAGUE OF MUNICIPALITIES -- MARCH 2006

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## Powell Bill Funds

**Distribution Schedule:** The distribution of Powell Bill proceeds is once a year on or before October 1. The total amount of these funds distributed to municipalities in October, 2005, was \$136,850,767. This distribution provided a per mile rate of \$1,709.23 and a per capita rate of \$23.20.

The State levies a gasoline tax of 17 cents plus a variable rate of either 3½ cents per gallon or 7 percent of the average wholesale price of motor fuel for the applicable base period, whichever is greater, on each gallon of gasoline sold in North Carolina. One and ¾ cents of this gasoline tax is distributed to cities and towns for street and sidewalk construction and maintenance purposes. Of this allocation, the distribution of 25 percent is to cities and towns based on the relative mileage of non-state system or local streets, and 75 percent based on relative population. To receive funds, each municipality must file an annual certified map and an annual expenditure report. (G.S. 136-41.1).

The specific eligibility requirements (G.S. 136-41.2A) for a municipality incorporated before January 1, 1945 are:

- it has conducted an election within the preceding four years and
- it must either impose an ad valorem tax or provide other funds for its operating expenses

For a city or town incorporated after January 1, 1945, to share in Powell Bill funds, it must certify that (G.S. 136-41.2):

- it has conducted its most recent required election,
- it has levied at least a five cent ad valorem tax for the current fiscal year,

- it has collected at least 50 percent of the total ad valorem tax levied for the preceding fiscal year, and
- it has formally adopted a budget ordinance showing revenue received from all sources and showing that funds have been appropriated for at least two of the following municipal services: water distribution; sewage collection or disposal; garbage and refuse collection or disposal; fire protection; police protection; street maintenance, construction or right-of-way acquisition; and street lighting.

Questions may be directed to Ms. Betsy Williams at the Department of Transportation (919/733-3524).

The 1989 General Assembly established the North Carolina Highway Trust Fund to finance highway improvements funded through gasoline taxes and vehicle registration and other fees. This measure also added a substantial supplement to Powell Bill allocations, amounting to 6.5 percent of Highway Trust Fund net revenues. (G.S. 136-176 (b)(3)). *[Background information on the Powell Bill Program and electronic copies of the "State Street Aid Allocations to Municipalities Report" can be found at: [www.ncdot.org/financial/fiscal/Enhancement/Powell\\_Bill/powellbill.htm](http://www.ncdot.org/financial/fiscal/Enhancement/Powell_Bill/powellbill.htm).]*

## ***Exemption from the State Road Tax on Motor Fuels***

The 2002 session of the General Assembly passed SB 1407, which eliminated the extra steps and paperwork of applying for a refund of the State Road Tax on Motor Fuels by exempting from the excise tax fuel that is sold to a county or municipality for its use, effective January 1, 2003.

The state's Motor Fuels and Excise Tax Division has informed fuel distributors of the change. If they attempt to charge tax on fuel for municipal use, please report this to the Division. For further information about the exemption, call Peggy Norris in the Department of Revenue at (919) 715-2607. (G.S. 105-449.88, -449.106)

## Utility Franchise Tax

**Distribution Schedule:** The municipal distributions of the utility franchise tax on electricity gross receipts are on September 15, December 15, March 15, and June 15. The total amount that was distributed to municipalities during FY2004-05 was approximately \$130,949,014.

The state levies a 3.22 percent franchise tax on the total gross receipts of all businesses within the State that furnish electricity. An amount equal to 3.09 percent of the total gross receipts of electricity service derived from the sale within any municipality is distributed to the municipality in which these gross sales are made. (G.S. 105-116).

*[The General Assembly, in 1998, replaced the utility franchise tax on piped natural gas with an excise tax on piped natural gas. In 2001 the General Assembly replaced the utility franchise tax on local telephone service with a new sales tax on telecommunications.]*

During the 1990 session, the General Assembly passed HB2377, which converted the utility franchise tax distribution from an automatic reserve for local governments to an annual appropriation by the legislature. In 1991, the Legislature froze all growth in the franchise tax.

During the 1993 session, the Legislature removed the utility franchise tax from the annual appropriation process and returned it to an automatic distribution with normal growth, effective in FY1995-96. The state will retain forever the amount of growth in the franchise tax from FY1990-91 through FY1994-95 (approximately \$30,000,000) and deduct it from the amount due local governments.

This retained growth, or holdback, is calculated separately for each municipality by subtracting

each city's FY1990-91 Utility Franchise Tax collections from those in FY1994-1995. In calculating quarterly distributions, this annual figure is divided by the state into four, equal quarterly holdback amounts and subtracted from actual collections before distribution to each city (105-116(d) and 105-120(c)).

The lifting of the freeze means that the distributions of these revenues are again based on actual utility franchise tax collections within each city's limits. It is important to remember that there are significant local variations in revenues and significant differences from city to city in the amount of holdback from the state, due to variations in each city's prior franchise tax growth rate.

Any local utility rate increases or decreases approved during the year, local variations in the weather, annexations, and losses or gains of industrial or other facilities that are heavy users of electric service during the fiscal year could cause individual city receipts to change in ways that differ from the statewide average growth rate.

Legislation passed during the 1997 session made adjustments to the holdback amounts for those cities and towns that received in FY1995-96 less than 95 percent of the amount of utility franchise tax they got in FY1990-91. It also provided for the proportionate cost to the Department of Revenue of administering the distribution to be subtracted from each city's distribution (G.S. 105-114(b), -116, -116.1, -120).

Legislation passed during the 2000 session amends G.S. 105-116.1 to provide an additional limited hold-harmless adjustment of utility franchise tax distributions to cities that in 1995-96 received less than 60 percent of the amount they received from such taxes in 1990-91. It applies to distributions on or after October 1, 2000.

*[Electronic copies of quarterly reports on the distribution of the utility franchise tax on electricity gross receipts can be found at: [www.dor.state.nc.us/publications/reimbursement.html](http://www.dor.state.nc.us/publications/reimbursement.html).]*

## **Piped Natural Gas Excise Tax**

**Distribution Schedule:** The municipal distributions of the piped natural gas excise tax are on September 15, December 15, March 15, and June 15. The total amount that was distributed to municipalities during FY2004-05 was approximately \$25,472,328.

SB1327, *No Tax On Gas Cities*, passed in 1998, replaced the existing utility franchise tax and sales and use tax on piped natural gas with a new excise tax on piped natural gas. Rates are based on monthly therm volumes received by the end-user of the gas.

The law provides for the quarterly distribution of part of the tax proceeds to cities, with each city receiving one-half of the amount of the new tax attributable to customers within that city's municipal boundaries for the quarter. It requires the Secretary of Revenue to determine each city's "benchmark amount" (amount of the utility franchise tax attributable to piped natural gas the city received for the corresponding quarter in FY1998-99) and provides that the amount distributed to a city under the new tax may not exceed the city's benchmark amount until each city receives its benchmark amount. The tax provisions of the law were effective July 1, 1999 and apply to natural gas delivered on or after that date. (G.S. Chapter 105, Article 5E; G.S. 105-116, -116.1, -122, -164.3 (25), -164.4(a), -164.13, -164.20, -259(b); G.S. 160A-211). [*Electronic copies of quarterly reports on the distribution of the piped natural gas excise tax can be found at: [www.dor.state.nc.us/publications/reimbursement.html](http://www.dor.state.nc.us/publications/reimbursement.html).*]

## **Telecommunications Sales Tax**

### **Distribution Schedule:**

Legislation passed during the 2001 session—HB571, *Simplify Taxes on Telecommunications* 2 and minor amendments in HB338 and SB1005—repealed the utility franchise tax on telephone companies and replaced it with a sales tax on telecommunications of 6 percent of gross receipts, effective January 1, 2002. Included in gross receipts are receipts from local, intrastate, interstate, toll, private, and mobile telecommu-

nications services; charges for directory assistance, call forwarding, call waiting, and similar services; customer access line charges billed to subscribers for access to the intrastate or interstate inter-exchange network; and charges billed to a pay telephone provider who uses the telecommunications service to provide pay telephone service (G.S. 105-164.3, -164.4, -164.4B, -164.16, -164.20, -164.27A, -164.44F).

The amount of the new tax the Secretary of Revenue must distribute quarterly to municipalities is 18.26 percent of the net proceeds of the tax, minus \$2,620,948. (This deduction is 1/4 of the annual amount by which the distribution to cities of the franchise tax on telephone companies was required to be reduced beginning in FY1995-96 as a result of the "freeze deduction.") The share for a city incorporated on or after January 1, 2001 is its per capita share of the amount to be distributed to all cities incorporated on or after that date. That amount is the proportion of the total to be distributed that is the same as the proportion of the population of cities incorporated on or after January 1, 2001 compared to the population of all cities.

In 2005, the General Assembly increased the State rate of tax on the gross receipts derived from providing telecommunications service from 6 percent to the new combined general rate of 7 percent (G.S. 105-164.4(a)(4c)). "Combined general rate" is defined in G.S. 105-164.3(4a) as "the State's general rate of tax . . . plus the sum of the rates of the local sales and use taxes."

The rate change was accompanied by a reduction in the percentage of the net proceeds on which the municipal distribution is based—to keep the municipal share revenue neutral—from 18.26 percent to 18.03 percent. (Effective for distributions of taxes collected during calendar quarters that begin on or after January 1, 2006; G.S. 105-164.44F(a).)

Cities incorporated before January 1, 2001, receive a proportionate share of the amount to be distributed to all cities incorporated before that date. The quarterly share is based on the amount of telephone gross receipts franchise taxes at-

tributed to the city under G.S. 105-116.1 for the same quarter that was the last quarter in which taxes were imposed on telephone companies under repealed G.S. 105-120 (franchise or privilege tax on telephone companies).

The municipal distributions of the sales tax on telecommunications gross receipts are on September 15, December 15, March 15, and June 15. The total amount that was distributed to municipalities during FY2004-05 was approximately \$56,285,767. *[Electronic copies of quarterly reports on the distribution of sales tax on telecommunications gross receipts can be found at: [www.dor.state.nc.us/publications/reimbursement.html](http://www.dor.state.nc.us/publications/reimbursement.html).]*

## Beer and Wine Tax

**Distribution Schedule:** The distribution of beer and wine taxes is within 60 days of March 31. The amount that was distributed to municipalities in FY2004-05 was \$18,703,575.

G.S. 105-113.82 provides for the distribution of 23¾ percent of state beer tax collections to local governmental units in which beer is legally sold, on a per capita basis. It further provides for the distribution of 62 percent of the state tax collections for taxes on unfortified wine and 22 percent of collections for taxes on fortified wine to local governmental units in which wine is legally sold, on a per capita basis. These distributions use incorporated municipal populations and the unincorporated population of counties to determine their respective per capita shares.

During the 1990 session, the General Assembly passed HB2377, which converted the beer and wine tax distribution from an automatic reserve for local governments to an annual appropriation by the legislature. In 1991, the Legislature froze all growth in the beer and wine tax. During the 1993 session, the Legislature removed the beer and wine tax from the annual appropriation process and returned it to an automatic distribution with growth, effective in FY1995-96. *[Electronic copies of the annual reports on the distribution of beer and wine taxes can be found at: [www.dor.state.nc.us/publications/reimbursement.html](http://www.dor.state.nc.us/publications/reimbursement.html).]*

## Local Option Sales and Use Taxes

*[Electronic copies of the monthly reports on the distribution of local sales and use taxes can be found at: [www.dor.state.nc.us/publications/reimbursement.html](http://www.dor.state.nc.us/publications/reimbursement.html).]*

### **One Percent Local Government Sales Tax (1971)**

Article 39 of Chapter 105 of the General Statutes provides that the county commissioners may, either upon their own action or upon the approval of the voters, levy a 1 percent local government sales tax along with the State sales and use tax at the general State rate. All 100 counties levy the tax.

The act further provides for the allocation of all the local sales taxes to the county of origin, but collected and administered by the Secretary of Revenue. In 2001, SB144, *Streamlined Sales/Use Tax Agreement*, changed the rule for determining the source of sale for a product. The distribution of this tax is now on a **point of delivery basis**, with most sales “delivered” within the county (in the store) in which the sales take place. However, for certain types of products, especially furniture, which are purchased in one county for delivery in another, there could be a shift in sales tax revenues away from a limited number of counties.

The division of the proceeds among a county and its municipalities is on one of two bases, depending upon the method chosen by the county commissioners at the time they levy the tax.

### **County Sales Tax Distribution Methods**

Every April, counties can change the method of distributing local option sales tax revenues within the county: from per capita to the proportion of ad valorem tax levies or the other way around. The method chosen by the county board of commissioners determines the division of money within a county area among county and municipal governments for the next year. Population or tax levy changes might make some counties take a close look at the distribu-

tion method they now use to see if it is still advantageous to them.

**Population Distribution.** The county commissioners may choose to distribute the proceeds between the county and the municipalities on a population basis. After adding the total population of the county to the population of each municipality, the distribution of the tax to each unit is on a per capita basis. For distributions based on the proportional populations of the units, a large annexation by one city, effective by July 1, may distort the next year's allocations. The population figure is the most recent estimate of population as certified to the Secretary of Revenue by the State Budget Officer. The act further provides that the State Budget Officer shall annually prepare and certify to the Secretary of Revenue such reasonably accurate population estimates.

**Ad Valorem Distribution.** The commissioners may choose to distribute the net proceeds of the tax collected in their county on an ad valorem basis. If they choose this method, the proceeds must be divided between the county and the municipalities in proportion to the total amount of ad valorem taxes levied by each. Therefore, a large tax increase by a unit in one year may distort the next year's allocations. When a county increases tax rates each year and the cities in that county hold the line on tax increases or keep increases at a minimum, it is possible for municipalities in ad valorem distribution counties to find that not only are their sales tax revenues not increasing at the statewide average, but that they are lower than the previous year.

For the purposes of this type of distribution, the amount of the ad valorem taxes levied by the county or municipality includes any ad valorem taxes levied by the county or municipality on behalf of a taxing district or districts (such as fire or sanitary) and collected by the county or municipality. If the county employs this basis, a municipality or county must share the proceeds with any district or districts on behalf of which the county or municipality levied ad valorem taxes in the proportion that the district levy

bears to the total levy of the county or municipality.

***Supplemental ½ Percent Local Government Sales Tax (1983) and Additional ½ Percent Local Government Sales Tax (1986)***

The 1983 General Assembly gave each county authority to levy an additional ½ percent local option sales tax (Article 40, G.S. Chapter 105). All 100 counties levy the tax.

The procedures for levy and collections are the same as for the original local option sales tax. However, the distribution of net proceeds is on a per capita basis among the counties that have levied the tax, instead of on a point-of-delivery basis. Once allocated to a county, the distribution of the funds among the county and its municipalities is under the same formula selected for use in that county under the original sales tax.

The 1985 General Assembly (1986 Regular Session) authorized counties to levy a second ½ percent local option sales tax, with an effective date not earlier than September 1, 1986 (Article 42, G.S. Chapter 105). All 100 counties levy the tax.

In the course of repealing the Intangibles Tax, the General Assembly changed the source of funding for:

- the Ad Valorem Tax Division,
- the Property Tax Commission,
- the Institute of Government's Property Tax Training Programs, and
- part of the operations of the Local Government Commission (G.S. 105-501).

Since FY1995-96, the funds that had been taken from the intangibles tax have been deducted from the proceeds of the second ½ percent local option sales tax before distribution to cities and counties.

All 100 counties have levied each of the first three local option taxes, and the total municipal allocation for FY2004-05 from the Department of Revenue was \$542,228,937.

### ***Third ½ Percent Local Government Sales Tax (2001)***

The 2001 General Assembly gave each county authority to levy a third ½ percent local option sales tax, effective July 1, 2003 (Article 44, G.S. Chapter 105). Food is exempted from this new tax. In exchange for that authority, it repealed the local government reimbursements for the intangibles tax, inventory tax, homestead exemption, and sales tax on food stamp purchases effective July 1, 2003.

The 2001 legislation specifies that half of the proceeds of the additional local option tax are to be distributed to the taxing counties on a per capita basis and half on a point of delivery basis. Distribution between the taxing county and municipalities therein is on the same basis as the existing one percent tax under G.S. Chapter 105, Article 39.

The legislation includes a hold-harmless provision requiring the Secretary of Revenue to make an annual payment on or before August 15, beginning in 2003 (G.S. 105-521), to those local governments whose estimated revenue from the sales tax is less than 100 percent of the value of their repealed reimbursements. By statute, the hold harmless payments are scheduled to expire after 2012. The minimum amount of hold harmless that will be distributed is \$100. The amount of hold harmless funds distributed to 115 municipalities in August 2005 was \$11,211,914. *[Electronic copies of the annual reports on the sales tax hold harmless distribution can be found at: [www.dor.state.nc.us/publications/reimbursement.html](http://www.dor.state.nc.us/publications/reimbursement.html).]*

In 2002, the General Assembly modified the third ½ percent local government sales and use tax by accelerating its effective date from July 1, 2003 to December 1, 2002. (SB 1292 - SL 2002-123) The reimbursement payments to local governments were repealed, effective retroactively to July 1, 2002 and no hold harmless funds were provided for FY2002-03.

All 100 counties have enacted the new ½ percent local option sales tax with an effective date on or before July 1, 2003. The total municipal allocation for FY2004-05 was \$121,795,352.

### ***Impact of the Change from Quarterly to Monthly Sales Tax Distributions***

The distribution of local option sales tax proceeds had been quarterly, on August 15, November 15, February 15, and May 15. Beginning with collections (not retail sales) on or after July 1, 2003, the distribution became monthly, within 45 days from the end of the collection month. (HB 232 - SL 2001-427) The first monthly distribution was September 15, 2003.

Unfortunately, the change from quarterly to monthly distributions caused an inconsistency in the way the September 15<sup>th</sup> distribution was being treated from an accounting perspective.

That distribution date falls beyond the 60-day period most units have used for determining if revenues are available for accrual at year end in General Fund statements. The continued use of a 60-day period would result in units recording less than 12 months of sales tax revenue in the 2003-04 fiscal year: because of the transition the July 2003 collections did not include all of June 2003 sales. The use of a 60-day period would also result in different revenue amounts between general fund and government-wide statements.

To solve this problem, the Local Government Commission (LGC) now encourages the use of a 90-day period for determining if revenues are available. By extending the accrual period from 60 to 90 days, the September 15, 2004 distribution can be accrued, as well as that monthly payment in subsequent years. This will meet GASB 33 measurement focus requirements and will result in prior period adjustments only if the amounts are material. Please refer to memo #1015 "Recognition of Sales Tax and Other Revenues at Year-End," issued by the LGC on March 31, 2004, for further details and guidance. [[www.treasurer.state.nc.us/NR/rdonlyres/CE6E899D-3045-4D3D-8837-9A349DA00FEF/0/Memo1015.pdf](http://www.treasurer.state.nc.us/NR/rdonlyres/CE6E899D-3045-4D3D-8837-9A349DA00FEF/0/Memo1015.pdf)]

### ***Two Percent Local Government Sales Tax on Food***

The 2003 session of the General Assembly passed legislation that provides for the administration of local sales taxes on food as if they

were state taxes. (Food is taxed under the Article 39, 40, and 42 sales and use taxes, but not under the Article 44 tax.) This was done to prevent any distortions in local sales tax distributions as North Carolina met the requirement of the national sales tax streamlining project to have a uniform tax rate on food. The sales tax streamlining project is designed to help capture sales tax revenue currently lost with remote (Internet and mail order) sales.

S97, *Revenue Laws Technical Changes*, allocates one-half of the net proceeds of local sales taxes on food to county areas on a per capita basis. The remaining net proceeds are distributed to county areas proportional to the FY1997-98 Article 39 distribution of the tax on food, the last year in which the separate distribution of the food tax to county areas was known. This alternative way to handle the local sales taxes on food became effective as of October 1, 2003 tax collections, not retail sales. (G.S. 105-469).

In 2005, the General Assembly changed the statute to clarify that one-half of the per capita amount of the local sales taxes on food is included in the distribution for the first one-half percent local tax (Article 40) and the other one-half is in the distribution for the second one-half percent local tax (Article 42). (G.S. 105-469(a)).

### ***Local Government Public Transportation Sales Tax (1997)***

The 1997 General Assembly gave Mecklenburg County authority to levy an additional ½ percent local option sales and use tax, the proceeds of which are to be used only for financing, constructing, operating, and maintaining local public transportation systems (Article 43, G.S. Chapter 105). The distribution of the funds among the county and its municipalities that operate public transportation systems is per capita. The tax in FY2004-05 produced the following distributed revenues: Charlotte \$25,619,471 and Huntersville, \$1,242,829.

### ***Refunds of Sales and Use Tax***

In 1991, the General Assembly authorized state agencies to get a refund of local government

sales taxes, just as local governments have long enjoyed a refund of the state sales tax. In 2003, the General Assembly exempted state agencies from paying local sales taxes on direct purchases of tangible personal property and services. (G.S. 105-164.14(e)) The change from refund to exemption has administratively simplified the process and reduced agency and Department of Revenue costs.

During the 1998 session, the General Assembly added local school administrative units to the list of governmental entities that may request refunds of sales and use taxes. (G.S. 105-164.14(c)).

Currently, 28 separate types of entities are entitled to sales tax refunds, excluding those related to economic development incentives. Not only have refunds been getting larger over past 10 years, but the change from quarterly to monthly distributions has also made them more noticeable, since they are not averaged out over three months as before. Refunds tend to bunch up in certain months, as there are monthly, quarterly, semi-annual, and annual filers. Therefore, the impact of refunds on a single month's distribution can be considerable (October 2003 is a good example). The variable impact of refunds, together with timing issues in the administration of the taxes (changing close-out dates, late submissions, etc.), also makes month-to-month comparisons with past sales tax data difficult.

In 2005, HB105 changes the law regarding city access to information about refunds. The statute was rewritten to provide that the information required to be given to a designated county official pertaining to refunds of tax of at least \$1,000.00 must also be given to the designated city official. It provides that a designated city official is the mayor of the city or a city official designated in a resolution adopted by the city's governing board. Cities now have the same access to refund information as counties and both are entitled to information on additional and any future refund categories. (G.S. 105-164.14(f)).

Just a reminder that municipalities are eligible for a refund of the state sales and use taxes they

pay on direct purchases of tangible personal property during the year. (G.S. 105-164.14(c)). You must file a claim for refund within six months following the close of the fiscal year during which the tax was paid. While this is not directly a revenue source, it is an important way to cut the cost of city and town purchases during the year. For further information about these refunds, call David Reardon in the Department of Revenue at (919) 733-7983.

percent local option sales tax, the 2002 session of the General Assembly repealed \$333.4 million in reimbursement payments to local governments, effective retroactively to July 1, 2002. Included were reimbursements for the inventory tax, intangibles tax, sales tax on food stamp purchases, and homestead exemption. (SB 1115, Section 30A.1 - SL 2002-126)

## **Local Occupancy Taxes**

More than 100 municipalities and counties now have local act authority to levy hotel, motel and other occupancy taxes. Each act is different and municipalities may levy an occupancy tax only under authority of a local act.

## **Prepared Food and Beverage Taxes**

Four counties, the Town of Hillsborough, and the City of Monroe (although it has not yet been approved by the voters) now have local act authority to levy a one percent sales tax on prepared food and beverages. Municipalities may levy this tax only under authority of a local act.

## **Eligibility for State-Collected Local Revenues**

The 1999 session of the General Assembly passed HB964, *Municipal Incorporation Process*, which provides that no municipality incorporated with an effective date on or after January 1, 2000, is eligible for Powell Bill funds, local option sales tax proceeds, utility tax distributions, or beer and wine tax distributions unless it complies with the 5-cent property tax rate and four services requirements for Powell Bill funds. It also makes a municipality incorporated with an effective date on or after January 1, 2000, ineligible for state-collected local revenues unless a majority of its street miles are open to the public.

## **State Reimbursements for Repealed Local Taxes**

In exchange for the authority to levy a third  $\frac{1}{2}$



## CITY OF WHITE HOUSE COMMERCIAL DESIGN STANDARDS

# DESIGN STANDARDS – ARCHITECTURAL STANDARDS

“There are opportunities that will enhance the standard of living within our community, opportunities that will create a better sense of ‘place’ for everyone. We need to set a new standard for design and commercial development within this community; a standard that will go beyond a typical small residential town’s planning efforts...changes that will foster the growth of community and family.”

- The Architecture Steering Committee

The quality of a development is largely determined by the characteristics of the buildings within it. For this reason, special attention must be given to the design of each building within the City of White House. This section sets forth standards that address each of the following:

- Size (height, massing, and scale)
- Materials
- Color

Design decisions related to the architecture must take into consideration the impact on the streetscape, the pedestrian scale of the development, and the characteristics of adjacent buildings to ensure compatibility and continuity in design.

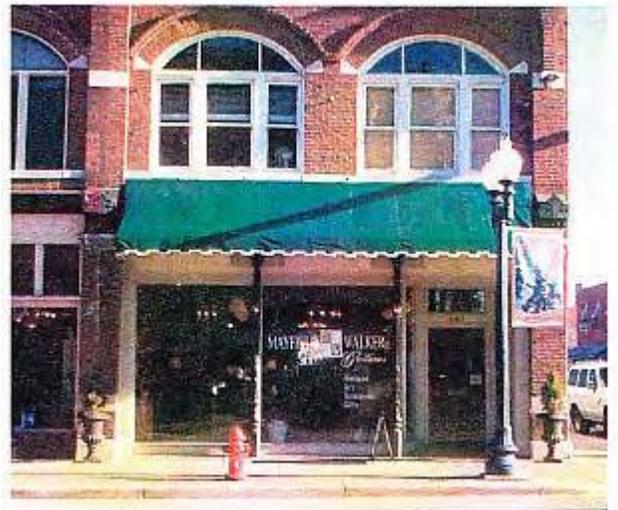
### **Building Height, Massing & Scale**

The height, mass and scale of the buildings and the features that comprise each building facade can affect the feel and character of the streetscape. Buildings shall be designed to reinforce the human scale of the pedestrian environment.

The impact that a building’s size has on the pedestrian environment can be controlled by stepping upper floors back, thereby creating a break in the facade and allowing more natural light on the street. Also, details incorporated into the facades of buildings such as windows, doors, a jog in the building wall, or a change in building materials to accentuate certain architectural features can also make a relatively large building appear smaller.

To maintain a pedestrian scale, buildings within shall adhere to the following:

1. Building heights shall not exceed thirty-five (35) feet except as permitted by the City of White House Zoning Ordinance.
2. Building design shall incorporate architectural features to reduce scale. Acceptable features include, but are not limited to columns, entry porches, arcades, canopies, step-downs, step-backs, roof elements, vertical and horizontal banding, pilasters, color variations, window treatment, textures, and change of materials.
3. Blank walls at ground floor street facades are not permitted.
4. Ground floor street facades shall have windows and doors that make up a minimum of sixty (60) percent of the facade.
5. Public entries shall be provided with shelter such as canopies, arcades or porches.



**DESIGN GUIDELINES DESCRIPTION:**

Elevated behind the Community Center Pond, Village 3 contributes to the image of the Pond as viewed from the Parkway. A grand residential statement is made as creatively articulated houses look out over the expansive pond at the heart of the community.

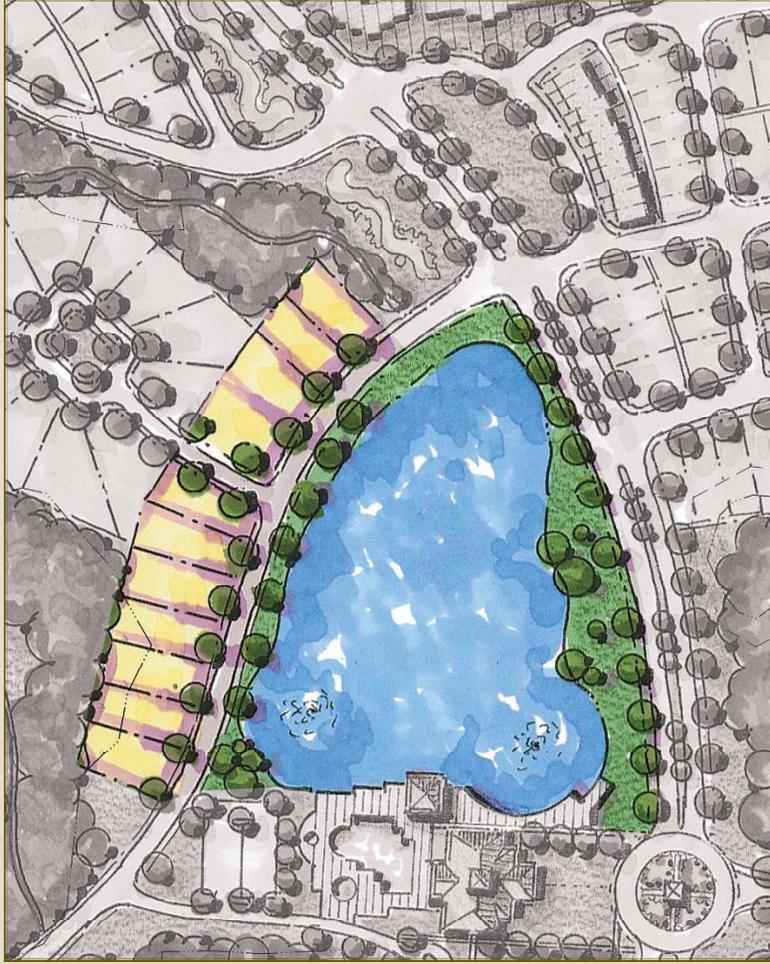
**Single Family lots:**

- 7200 s.f. min. lot size
- Minimum 2 story
- Alley load lots (where possible). Existing wetlands may prevent alleys in some locations.

© RONA M KOORBEYAS



Community Center Pond

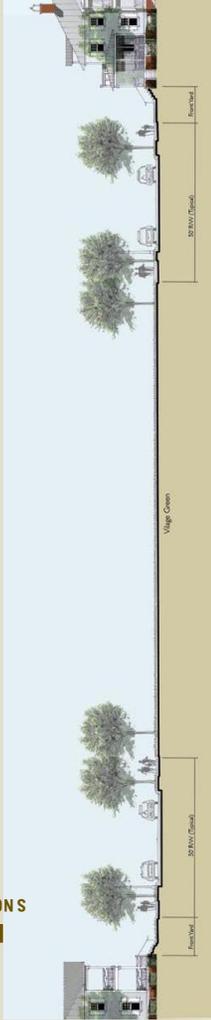
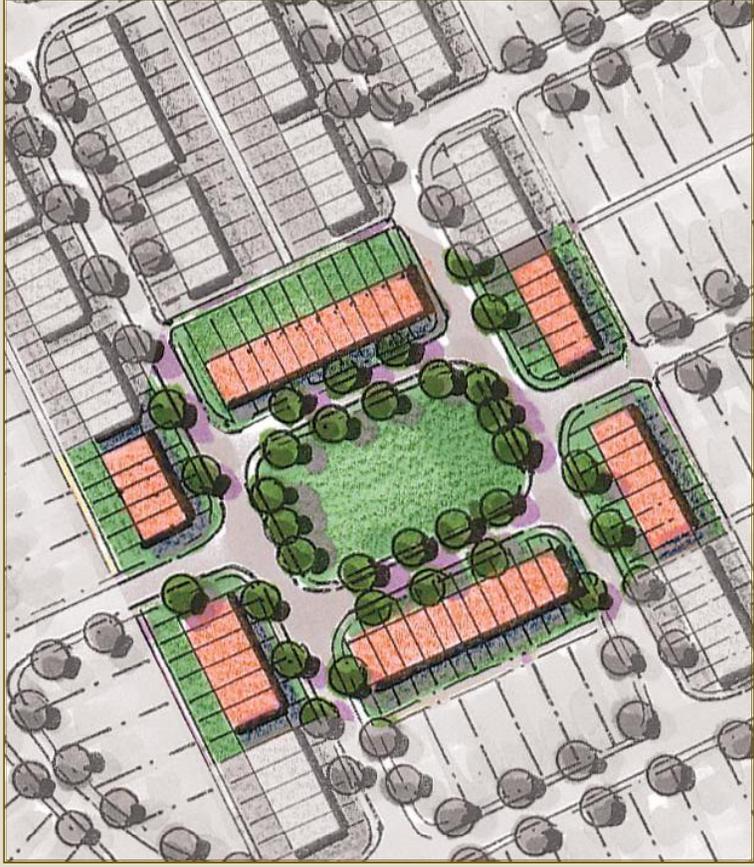


*A custom designed neighborhood will overlook the community center and lake.*



**DESIGN GUIDELINES DESCRIPTION:**

Village 4 serves as a dense neighborhood pocket park, featuring attached houses that form a homogeneous edge for the formal park at the center. All architecture for the attached homes should consistently relate to each other, architecturally. Views into and out of the park are further pronounced by the orthogonal block patterns.



*Custom designed townhomes will have pocket parks and courtyards, throughout the neighborhood.*



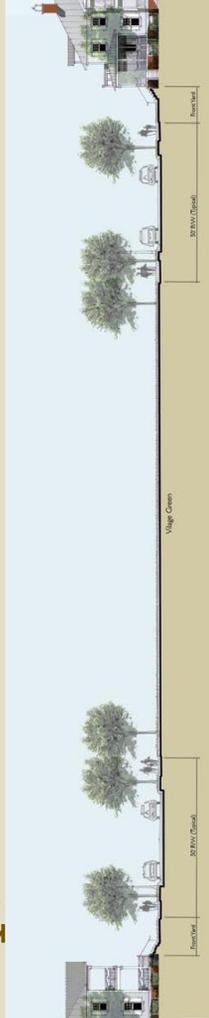
© KOORBEYAS  
SNO MDC RETRAHC



© KOOREYAS & ASSOCIATES

**DESIGN GUIDELINES DESCRIPTION:**

The principal purpose of Village 5 is to create a monumental residential expression for the neighborhood along Hwy 544. Village and Estate lots align to create a picturesque streetscape, opening up to a formal green with a large pond in the background. Elevated above the pond, Estate lots overlook the grand residential entry and serve as the terminating view as one enters into the community.



*Signature parks and lakes in the neighborhood will be framed by custom designed homes with grand porches and architectural elements.*



**SECTION C**

ARCHITECTURAL VISION

## HISTORY AND CHARACTER

The Lowcountry Classical style is based on the Georgian, Federal and Classical Revival styles found in abundance in surrounding coastal Carolina communities from the mid-18th century to mid-20th century. Another regional style called the Georgetown “single” or “double” house, set with its narrow end facing the street and side-flanking porches, will be an important local adaptation of this style.

The Lowcountry Classical house marries the grandeur and sophistication of the quintessential Southern summer home and the more casual expression of comfort. The undisturbed quality of these homes provide an elegant foundation to the community and reflects the permanence of the Southern Tradition.

Lowcountry Classical homes have a refined, graceful quality that is most evident in the simple, yet thoughtful detailing of the columns and porches as a reflection of the main house. The union of elegance and livability is reflected in gracious outdoor rooms and the sometimes informal approach to the home.



Federal-style home with double porch and fan light/side light entry on both levels. Beaufort, SC

## DEFINING CHARACTERISTICS

- Well-proportioned homes, symmetrical with special attention to eave and cornice detailing.
- Temple-front facades are common, as are expansive verandas, single and double-story porches, and overall orderly composition.
- Entries are often accentuated with gable front porch extensions, column pairs and semi-circular steps to grade. Main level is generally 3’-4’ above grade.
- Windows are vertical in proportion, with divided lights in both sashes and sized to draw from the coastal climate.



Three-bay front porch with square balusters in a Chippendale pattern. Beaufort, SC



Entry portico w/ semi-circular brick steps and wrought iron rail. Beaufort, SC



Greek Revival raised cottage, Georgetown, SC



The Ocean Forest Country Club clubhouse completed in 1927 (now known as Pine Lakes Country Club) is characteristic of the Classical Revival Style. The two-story entry porch is supported by Doric columns. The three part composition is composed of the two-story main building flanked by one-story wings (not shown).

This compendium is a collection of referenced funding resources available for greenway, trail and bikeway development in the State of North Carolina. Please note the following information is a collection of specific funding information obtained from each funding agency. All sources are cited and detailed information is available from each source's web site and noted contacts.

**Overview of Funding Strategies**

The following section highlights possible greenways funding strategies that could provide a consistent source of dedicated capital to help build high priority greenways at a faster than normal pace.

**Revenue Bonds**

A revenue bond is a municipal bond identified by its guarantee of repayment solely from revenues generated by a specified revenue-generating entity associated with the purpose of the bonds. Revenues specified in the legal contract between the bond holder and bond issuer are required to be used for repayment of the principal and interest of the bonds; other revenues (notably tax revenues) and the general credit of the issuing agency are not so encumbered. This is the major difference between a revenue bond and a general obligation bond. Due to the pledge of secured funds is not as great as that of general obligation bonds, revenue bonds may carry a slightly higher interest rate than general obligation bonds; however, but are also considered one of the most secured type of municipal bonds options.

**General Obligation Bonds**

General obligation bonds are issued with the underlying belief that a municipality will be able to repay its debt obligation through taxation or revenue from projects. This financial commitment does not require assets to be used as collateral, but is issued as "good faith debt". A GOB is a bond sold by a specified jurisdiction to investors to raise money. Typically, money is raised for capital improvement projects and general improvements (i.e. open space acquisition and/or park and greenway construction); this depends on the local and state laws which are subject to change. A GOB requires a referendum approval before issued. This portion of the process is time sensitive as referendums are approved or denied in election years.

**Special Assessment Bonds**

A special type of municipal bond used to fund a development project. Interest owed to lenders is paid by taxes levied on the community benefiting from the particular bond-funded project. For example, if a bond of this sort was

issued to pay for sidewalks to be re-paved in a certain community, an additional tax would be levied on homeowners in the area benefiting from this project. Area homeowners get nicer walking paths, and they will probably see the value of their property increase accordingly, but this comes at a price. Their property taxes will increase to pay the interest owed to the bondholders by the municipality. Source:<http://www.investopedia.com>

**State Revolving Fund Loans**

There is a variety of revolving loan funds offered through the State of North Carolina for water pollution control and environmental protection. These revolving loan funds are available for local communities and act similar to revenue bonds which require upfront revenue repayment sources, limited repayment terms and low interest rates.

**Installment Purchase Agreement**

An installment purchase agreement is basically a payment plan to compensate property owners for restrictions on the future use of their land. IPAs spread out payments so that landowners receive tax exempt interest over a period up to 30 years. The principal of the sales amount is due at the end of the agreed upon term thus making the agreement favorable in terms of property taxes. However, because installment purchase agreements are essentially long-term debt, the agreements generally require the same approvals as general obligation bonds and require a dedicated funding source to be in place (American Farmland Trust, 2000).

**Mitigation Banking**

Mitigation banking involves the creation, preservation, or enhancement of wetlands. This happens only when wetland losses are unavoidable in advance of development actions, when the wetland cannot be compensated for within the development's parameters, or when the wetland would not be as environmentally beneficial. It typically involves the consolidation of small, fragmented wetland mitigation projects into one large contiguous site. Units of restored, created, enhanced or preserved wetlands are expressed as "credits" which may subsequently be withdrawn to offset "debits" incurred at a project development site.

**Private Individual Donations**

Private individual donations can come in the form of liquid investments (i.e. cash, stock, bonds) or land. Municipalities typically create funds to facilitate and simplify a transaction from an individual's donation to the given municipality. Donations are mainly received when a widely supported

capital improvement program is undergone. Such donations can improve capital budgets and/or projects.

### Corporate Donations

Corporate donations are often received in the form of liquid investments (i.e. cash, stock, bonds) and in the form of land. Municipalities typically create funds to facilitate and simplify a transaction from a corporation's donation to the given municipality. Donations are mainly received when a widely supported capital improvement program is undergone. Such donations can improve capital budgets and/or projects.

### Corporate Sponsorships

Corporate sponsorships are often delivered in the form of services, personnel volunteers, liquid investments (cash or stock) or land. Municipalities often team with corporations for necessary and or alternative funding. A sponsorship, which is the equivalent of a donation, usually involves some marketing elements or recognition in some form or another. The benefits of marketing often improve the image of the given corporation and are often thought to benefit both parties.

### Foundation Grants

Foundation grants are provided by corporations, individuals, or organizations with a specific mission. The process involves an application which requires the municipality to explain the direct relation between the foundation's mission and the applicant's reason for the funding needs. Foundation grants can offer a wide range of awards from a thousand dollars to a million dollars. The award amounts depend on the foundation's funding capacity and allocation decision.

### Federal Grants

The federal government offers grants for a variety of purposes. These grants can be extremely large and can jump start or complete an entire capital improvements program. Municipalities must apply for grants and express a connection between its agenda and the grants purpose. Given the financial capacity of these grants, each is extremely competitive among all jurisdictions.

### State Grants

Each state offers a variety of grants, each with specific purposes. State grants are limited to municipalities within the specific state's border. These grants range from capital improvement projects to economic revitalization purposes. The award amounts of these grants depend on the state's funding capacity and allocation decisions.

### Local Grants

Municipalities oftentimes offer a variety of grants, each with specific purposes. Local grants are limited to areas within the specific municipality's border. These grants range from capital improvement projects to economic revitalization purposes. The award amounts of these grants depend on the state's funding capacity and allocation decisions. These grants are typically much lower than federal grants and state grants.

### Fundraising / Campaign Drives

Organization and individuals can participate in a fundraiser of a campaign drive. It is essential to market the purpose of a fundraiser to rally support and financial backing. Oftentimes fundraising satisfies the need for public awareness, public education, and financial support.

### Land Trust Acquisition and Donation

Land trusts are held by a third party other than the primary holder and the beneficiaries. This land is oftentimes held in a corporation for facilitating the transfer between two parties. For conservation purposes, land is often held in a land trust and received through a land trust. A land trust typically has a specific purpose such as conservation and is used so land will be preserved as the primary holder had originally intended.

### Greenway Specific Trust Fund

A greenway specific trust fund is a holding company designated to shelter land for the purpose of greenway usage. This land should be preserved as intended and is protected by law. The trust can accept land, funding, or both. The land can be utilized for the actual greenway or for a potential land swap, which depends on the donor's specifications. Funding can be used for infrastructure, land acquisition, maintenance, and/or services.

### Capital Budget Increase

An increase in the capital budget increases the financial capacity for capital improvements. This option is rarely exercised unless there is a specific use for the capital reallocation. Capital budgets changes originate in the capacity of the federal government, state, county, town or city. It is possible for a jurisdiction to ask for a change in capital budget from more than one entity to obtain funding for a project.

### Local Budget Yearly Contributions

Local governments may choose to contribute to capital improvement projects on an annual basis as opposed to a one-time budget allocation. A funding change such as this offers a project a financial perpetuity which is a continuous stream of funding. This is especially beneficial when a project requires additional funding for maintenance, operations, salaries, or scheduled enhancements.

**Overview Federal Funding Sources**

**Surface Transportation Program - Transportation Enhancement Activities**

Pedestrian and bicycle projects are eligible for all Surface Transportation Program (STP) funds. The STP provides more than \$6 billion annually to the States through a formula apportionment. Ten percent must be used for Transportation Enhancement (TE) Activities. TE funds provide about two-thirds of the Federal-aid highway funding for pedestrian and bicycle projects and programs. TE funds may be used for project construction and related activities, but not for routine maintenance. TE projects must relate to surface transportation, but many TE projects benefit recreation.

Three of the 12 TE categories specifically benefit pedestrians, bicyclists, and trails:

- Pedestrian and bicycle facilities (which may include sidewalks, bicycle parking, bicycles on buses, and pedestrian and bicycle transportation facilities, including shared use paths),
- Pedestrian and bicycle safety and education activities
- Preservation of abandoned railway corridors (also known as rail-trails or rails-to-trails).

Since 1992, more than 20,000 TE projects have been selected for funding, totaling about \$6 billion. More than half of the TE funds have been used for pedestrian and/or bicycle facilities and related projects. About one-third to one-half of these projects are shared use paths or trail-related, including more than 1,000 rail-trail projects.

Many States give extra credit to projects that benefit two or more of the eligible TE activities (including items such as scenic or historic easements, landscaping and scenic beautification, historic preservation, environmental mitigation, and transportation museums).

In general, the maximum Federal share for TE projects is 80 percent (higher in States with large proportions of Federal lands). The non-Federal match must come from project

sponsors or other fund sources. Some in-kind materials and services may be credited toward the project match. Some States allow case-by-case exceptions to standard Federal-aid requirements.

**Source:**  
[www.fhwa.dot.gov/environment/te](http://www.fhwa.dot.gov/environment/te) and  
[www.enhancements.org](http://www.enhancements.org)

**Contact:**  
 Denese Lavender  
 Administrator  
 Enhancements Unit  
 Department of Transportation  
 1534 Mail Service Center  
 Raleigh, NC 2766-1534  
 Tel: 919-733-2039 Fax: 919-733-3585  
 Email: [dlavender@dot.state.nc.us](mailto:dlavender@dot.state.nc.us)

**Surface Transportation Act (SAFETEA LU)**

“On August 10, 2005, the President signed into law the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU). With guaranteed funding for highways, highway safety, and public transportation totaling \$244.1 billion, SAFETEA-LU represents the largest surface transportation investment in our Nation’s history. The two landmark bills that brought surface transportation into the 21st century—the Intermodal Surface Transportation Efficiency Act of 1991 (ISTEA) and the Transportation Equity Act for the 21st Century (TEA-21)—shaped the highway program to meet the Nation’s changing transportation needs. SAFETEA-LU builds on this firm foundation, supplying the funds and refining the programmatic framework for investments needed to maintain and grow our vital transportation infrastructure.

**Source:**  
 Federal Highway Administration Office of Legislation and Intergovernmental Affairs Program Analysis Team

**Contact:**  
 Denese Lavender  
 Administrator  
 Enhancements Unit  
 Department of Transportation  
 1534 Mail Service Center  
 Raleigh, NC 2766-1534  
 Tel: 919-733-2039 Fax: 919-733-3585  
 Email: [dlavender@dot.state.nc.us](mailto:dlavender@dot.state.nc.us)

**Recreational Trails Program (RTP)**

The Recreational Trails program provides funds to the States to develop and maintain recreational trails and trail-related facilities for both non-motorized and motorized recreational trail uses. Funded by contract authority, to remain available for 4 years. Funds are subject to the overall Federal-aid highway obligation limitation. Before apportioning funds to the States, there will be a takedown of \$840,000 each fiscal year (2005-2009) for program research, technical assistance, and training expenses.

Funds are available to develop, construct, maintain, and rehabilitate trails and trail facilities. Trail uses include hiking, bicycling, in-line skating, equestrian use, cross-country skiing, snowmobiling, off-road motorcycling, all-terrain vehicle riding, four-wheel driving, or using other off-road motorized vehicles.

Continued eligibilities include:

- Maintenance and restoration of trails
- Development and rehabilitation of trailside and trailhead facilities
- Purchase and lease of trail construction and maintenance equipment
- Construction of new trails (with some limits on Federal lands)
- Acquisition of easements and fee simple title to property
- Assessment of trail conditions for accessibility and maintenance
- Development and dissemination of publications and operation of trail safety and trail environmental protection programs.

New eligible activities include:

- Assessment of trail conditions for accessibility and maintenance
- Clarification that education funds may be used for publications, monitoring and patrol programs and for trail-related training

States must meet minimum funding between motorized, non-motorized and diverse trail use:

- 40% for diverse trail use;
- 30% for non-motorized recreation
- 30% for motorized recreation

The ability for a State recreational trails advisory committee to waive the set-asides for non-motorized and motorized recreation has been eliminated by SAFETEA-LU.

States are encouraged to enter into contracts and cooperative agreements with youth conservation and service corps to perform trail construction and maintenance.

Recreational Trails program funds may be used to match other Federal program funds for purposes that would be eligible under the Recreational Trails program

**Source:**

<http://www.fhwa.dot.gov/environment/rectrails/>

**Contact:**

Darrell L McBane, State Trails Coordinator  
 NC Division of Parks & Recreation  
 MSC 1615  
 Raleigh NC 27699-1615  
 919-715-8699; Fax 919-715-3085  
 darrell.mcbane@ncmail.net

**Congestion Mitigation and Air Quality (CMAQ)**

The Congestion Mitigation and Air Quality Improvement Program (CMAQ) provides funding for projects and programs in air quality nonattainment and maintenance areas for ozone, carbon monoxide (CO), and particulate matter (PM-10, PM-2.5) which reduce transportation related emissions.

Funded by contract authority, to remain available for 4 years. Funds are subject to the overall Federal-aid obligation limitation.

Funds are apportioned according to a formula based on population and severity of pollution in ozone and carbon monoxide areas, similar to the formula under TEA-21, but weighting factors have been revised.

A State may transfer CMAQ funds to its Surface Transportation, National Highway System, Interstate Maintenance, Bridge, Highway Safety Improvement, and/or Recreational Trails apportionment.

States and MPOs are encouraged to consult with State and local air quality agencies in non-attainment and maintenance areas on the estimated emission reductions from proposed congestion mitigation and air quality improvement programs and projects.

An evaluation and assessment of CMAQ projects and programs to determine the direct and indirect impact of the projects on air quality and congestion is required. A cumulative database describing the impacts shall be maintained and disseminated.

The Federal share is generally 80 percent, subject to sliding scale and 90 percent for Interstate projects. Certain other activities, including carpool/vanpool projects, priority control systems for emergency vehicles and transit vehicles and traffic control signalization receive a Federal share of 100 percent

**Source:**  
www.fhwa.dot.gov

**Contact:**  
Denese Lavender  
Administrator  
Enhancements Unit  
Department of Transportation  
1534 Mail Service Center  
Raleigh, NC 2766-1534  
Tel: 919-733-2039 Fax: 919-733-3585  
Email: dlavender@dot.state.nc.us

**Land and Water Conservation Fund (LWCF)**

The Land and Water Conservation Fund (LWCF) provides funding to assist in preserving, developing, and assuring accessibility to outdoor recreation resources including but not limited to parks, trails, wildlife lands, and other lands and facilities desirable for individual active participation. Grants are to be evaluated based on:

- how the project addresses the identified needs and priorities of a statewide comprehensive or strategic plan
- technical merits
- public/private partnerships

Eligible Grant Recipients:

- Counties, cities and towns
- Park districts
- Port districts
- Tribal governments
- State agencies

Grant recipients must provide at least 50% matching funds in either cash or in-kind contributions. Applications are to be evaluated in a competitive process by a team of experts, with criteria developed by a citizen advisory committee. A portion of Federal revenue derived from sale or lease of off-shore oil and gas resources. The program is administered by the US Department of the Interior through the National Park Service.

**Source:**  
http://www.nps.gov/

**Contact:**

Division of Parks and Recreation  
Dept. of Environmental and Natural Resources  
P.O. Box 27687  
Raleigh, NC 27611-7687  
Tel: 919-733-4181

**Environmental Protection Agency (EPA) - Environmental Education Grants Program**

The Grants Program sponsored by EPA's Environmental Education Division (EED), Office of Children's Health Protection and Environmental Education, supports environmental education projects that enhance the public's awareness, knowledge, and skills to help people make informed decisions that affect environmental quality. EPA awards grants each year based on funding appropriated by Congress. Annual funding for the program ranges between \$2 and \$3 million. More than 75 percent of the grants awarded by this program receive less than \$15,000.

**Source:**  
http://www.epa.gov/enviroed/grants.html

**Contact:**  
Alice Chastain  
U.S. EPA, Region 4  
Environmental Education Grants  
Office of Public Affairs  
61 Forsyth Street SW  
Atlanta, GA 30303  
chastain.alice@epa.gov

**Community Block Development Grant Program (HUD-CDBG)**

Since States are in the best position to know and to respond to the needs of local governments, Congress amended the Housing and Community Development Act of 1974 (HCD Act) in 1981 to give each State the opportunity to administer CDBG funds for non-entitlement areas. Non-entitlement areas include those units of general local government which do not receive CDBG funds directly from HUD as part of the entitlement program (Entitlement Cities and Urban Counties). Non-entitlement areas are cities with populations of less than 50,000 (except cities that are designated principal cities of Metropolitan Statistical Areas), and counties with populations of less than 200,000.

The State CDBG program has replaced the Small Cities program in States that have elected to participate. Currently, 49 States and Puerto Rico participate in the program. HUD continues to administer the program for the non-entitled counties in the State of Hawaii because the State has permanently elected not to participate in the State CDBG.

The primary statutory objective of the CDBG program is to develop viable communities by providing decent housing and a suitable living environment and by expanding economic opportunities, principally for persons of low- and moderate-income.

Communities receiving CDBG funds from the State may use the funds for many kinds of community development activities including, but not limited to:

- Acquisition of property for public purposes;
- Construction or reconstruction of streets, water and sewer facilities, neighborhood centers, recreation facilities, and other public works;
- Demolition;
- Rehabilitation of public and private buildings;
- Public services;
- Planning activities;
- Assistance to nonprofit entities for community development activities; and
- Assistance to private, for profit entities to carry out economic development activities (including assistance to micro-enterprises).

**Source:**

[www.hud.gov](http://www.hud.gov)

**Contact:**

Greensboro Field Office  
 Asheville Building  
 1500 Pinemcree Road  
 Suite 401  
 Greensboro, NC 27407-3838  
 Field Office Director (336) 547-4001  
 Fax (336) 547-4138

**Overview of State Funding Sources**

**North Carolina DOT – Bicycle and Pedestrian Program**

The North Carolina General Assembly enacted legislation (G.S. 136-71.12 Funds) that authorizes the North Carolina Department of Transportation (NCDOT) to spend any federal, state, local, or private funds available to the Department and designated for the accomplishment of Article 4A, Bicycle and Bikeway Act of 1974. In addition to the 2005 Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) requires the Department to set aside federal funds from eligible categories for the construction of bicycle and pedestrian transportation facilities”

*Federal Aid Construction Funds* – Several categories of federal aid construction funds — National Highway System

*(NHS) and Surface Transportation Program (STP) — or Congestion Mitigation and Air Quality (CMAQ) funds provide for the construction of pedestrian and bicycle transportation facilities. The primary source of funding for bicycle and pedestrian projects is STP Enhancement Funding.*

*Governor’s Highway Safety Program (GHSP) – GHSP funding is provided through an annual program, upon approval of specific project requests, to undertake a variety of pedestrian and bicycle safety initiatives. Amounts of GHSP funds vary from year to year, according to the specific amounts requested.*

*Independent Projects – \$6 million is annually set aside for the construction of bicycle improvements that are independent of scheduled highway projects in communities throughout the state. Eighty percent of these funds are from STP-Enhancement funds, while state funds provide the remaining 20 percent. Currently, \$1.4 million is annually set aside for pedestrian hazard elimination projects in the 14 NCDOT highway divisions across the state; \$200,000 is allocated to the Division of Bicycle and Pedestrian Transportation for projects such as training workshops, pedestrian safety and research projects, and other pedestrian needs statewide.*

**Source:**

[www.ncdot.org](http://www.ncdot.org)

**Contact:**

Division of Bicycle and Pedestrian Transportation  
 401 Oberlin Road, Suite 250, Raleigh, NC 27605 (Delivery)  
 1552 Mail Service Center, Raleigh, NC 27699-1552 (Mail)  
 Main Office  
 (919) 807-0777  
 Fax (919) 807-0768  
[bikeped\\_transportation@dot.state.nc.us](mailto:bikeped_transportation@dot.state.nc.us)

**North Carolina's Clean Water Management Trust Fund (CWMTF)**

North Carolina's Clean Water Management Trust Fund (CWMTF) was established by the General Assembly in 1996 (Article 18; Chapter 113A of the North Carolina General Statutes). CWMTF receives a direct appropriation from the General Assembly in order to issue grants to local governments, state agencies and conservation non-profits to help finance projects that specifically address water pollution problems. The 21-member, independent, CWMTF Board of Trustees has full responsibility over the allocation of moneys from the Fund.

CWMTF will fund projects that (1) enhance or restore degraded waters, (2) protect unpolluted waters, and/or (3) contribute toward a network of riparian

**Source:**

<http://www.cwmtf.net>

**Contact:**

Western Piedmont Field Representative:  
Bern Schumak  
(336) 366-3801  
bschumak@surry.net

**North Carolina Parks and Recreation Trust Fund (PARTF)**

The North Carolina General Assembly established the Parks and Recreation Trust Fund (PARTF) on July 16, 1994 to fund improvements in the state's park system, to fund grants for local governments and to increase the public's access to the state's beaches. The Parks and Recreation Authority, an eleven-member appointed board, was also created to allocate funds from PARTF to the state parks and to the grants program for local governments.

PARTF is the primary source of funding to build and renovate facilities in the state parks as well as to buy land for new and existing parks.

The PARTF program also provides dollar-for-dollar grants to local governments. Recipients use the grants to acquire land and/or to develop parks and recreational projects that serve the general public. At this website, you can learn how to apply for a grant, see lists of past grant recipients, and download an application. You can also learn about the Parks and Recreation Authority and how to contact us. A portion of PARTF is the primary funding source for the Public Beach and Coastal Waterfront Access Program. The program, administered by the Division of Coastal Management (DCM), offers matching grants to local governments throughout North Carolina's twenty coastal counties.

**Source:**

<http://www.partf.net>

**Contact:**

John Poole, Program Manager  
1615 MSC  
Raleigh, NC 27699-1615  
Phone: (919) 715-2662  
e-mail: John.Poole@ncmail.net

**North Carolina Natural Heritage Trust Fund**

Established in 1987, the North Carolina Natural Heritage Trust fund provides supplemental funding to select state agencies for the acquisition and protection of important

natural areas, to preserve the state's ecological diversity and cultural heritage, and to inventory the natural heritage resources of the state. The enabling legislation is found at General Statute Article 5A Sections 113-77.6 through 113-77.9.

The trust fund is supported by 25% of the state's portion of the tax on real estate deed transfers and by a portion of the fees for personalized license plates. These sources now generate about \$19 million each year. Since its creation, the trust fund has contributed more than \$136 million through 345 grants to support the conservation of more than 217,000 acres.

Conserving North Carolina's natural and cultural heritage now is critical. The state's population is expected to grow by 50% in the next 25 years (that's 4 million more people!) As detailed on One NC Naturally's website, North Carolina loses an estimated 383 acres per day of woodlands, farmland and open space. This loss of natural areas has serious consequences for our air and water quality, wildlife habitat, recreational opportunities, and our quality of life. Jobs in rural areas are increasingly dependent upon tourism generated by scenic beauty, historic places and quality outdoor recreational opportunities. Land conservation helps families to continue working in forestry and farming. Surveys show that open space, outdoor recreational opportunities and other conservation benefits are important for attracting and keeping knowledge-based workers.

The Natural Heritage Trust Fund invests in North Carolina's most significant natural areas, strengthening our communities and our economy

**Source:**

<http://www.ncnhf.org/>

**Contact:**

Lisa Riegel, Executive Director  
MSC 1601  
Raleigh, NC 27699-1601  
Phone (919) 715-8014  
Fax (919) 715-3060  
Email: nc.nhft@ncmail.net

**North Carolina Conservation Income Tax Credit Program**

North Carolina has a unique incentive program to assist land-owners to protect the environment and the quality of life. A Credit is allowed against individual and corporate income taxes<sup>1</sup> when real property is donated for

conservation purposes. Interests in property that promote specific public benefits may be donated to a qualified recipient. Such conservation donations qualify for a substantial tax credit.

**Source:**

<http://www.enr.state.nc.us/conservationtaxcredit/>

**Contact:**

N.C. Department of Revenue  
(919) 733-4684 for individual income taxes  
or call (919) 733- 3166 for corporate income taxes.

**North Carolina Adopt-a-Trail Grants**

The Adopt-A-Trail Grant Program (AAT) awards \$108,000 annually to government agencies, nonprofit organizations and private trail groups for trails projects. The funds can be used for trail building, trail signage and facilities, trail maintenance, trail brochures and maps, and other related uses. Requires no local match or in-kind services.

**Source:**

<http://ils.unc.edu/parkproject/trails/grant.html>

**Contact:**

Darrell McBane  
(919) 715-8699  
darrell.mcbane@ncmail.net.  
N.C. Division of Parks and Recreation  
State Trails Program  
1615 Mail Service Center  
Raleigh, NC 27699-1615

**North Carolina Division of Water Quality - 319 Program Grants**

By amendment to the Clean Water Act Section in 1987, the Section 319 Grant program was established to provide funding for efforts to curb nonpoint source (NPS) pollution, including that which occurs through stormwater runoff. The U.S. Environmental Protection Agency provides funds to state and tribal agencies, which are then allocated via a competitive grant process to organizations to address current or potential NPS concerns. Funds may be used to demonstrate best management practices (BMPs), establish Total Maximum Daily Load (TMDL) for a watershed, or to restore impaired streams or other water resources. In North Carolina, the 319 Grant Program is administered by the Division of Water Quality of the Department of Environment and Natural Resources.

Each fiscal year North Carolina is awarded nearly 5 million dollars to address nonpoint source pollution through its 319 Grant program. Thirty percent of the funding supports

ongoing state nonpoint source programs. The remaining seventy percent is made available through a competitive grants process. At the beginning of each year (normally by mid-February), the NC 319 Program issues a request for proposals with an open response period of three months. Grants are divided into two categories: Base and Incremental. Base Projects concern research-oriented, demonstrative, or educational purposes for identifying and preventing potential NPS areas in the state, where waters may be at risk of becoming impaired. Incremental projects seek to restore streams or other portions of watersheds that are already impaired and not presently satisfying their intended uses.

State and local governments, interstate and intrastate agencies, public and private nonprofit organizations, and educational institutions are eligible to apply for Section 319 monies. An interagency workgroup reviews the proposals and selects those of merit to be funded.

**Source:**

[http://h2o.enr.state.nc.us/nps/Section\\_319\\_Grant\\_Program.htm](http://h2o.enr.state.nc.us/nps/Section_319_Grant_Program.htm)

**Contact:**

Mooresville Regional Office  
610 East Center Ave  
Suite 301• Mooresville, NC 28115  
Voice: (704) 663-1699  
Fax: (704) 663-6040

**North Carolina Ecosystem Enhancement Program**

Clean water, clean air and thriving natural habitats are fundamental indicators of a healthy environment. Protecting North Carolina's ecosystems is critical to maintaining the state's quality of life, continuing its economic growth, and ensuring the health and well-being of its citizens.

According to the three-party Memorandum of Agreement that established the initiative's procedures in July 2003, the mission of the Ecosystem Enhancement Program is to "restore, enhance, preserve and protect the functions associated with wetlands, streams and riparian areas, including but not limited to those necessary for the restoration, maintenance and protection of water quality and riparian habitats throughout North Carolina."

EEP provides:

- High-quality, cost-effective projects for watershed improvement and protection;
- Compensation for unavoidable environmental impacts associated with transportation-infrastructure and economic development; and

- Detailed watershed-planning and project-implementation efforts within North Carolina's threatened or degraded watersheds.

**Source:**

<http://www.nceep.net>

**Contact:**

MAIN OFFICE  
Shipping Address:  
2728 Capital Blvd, Suite 1H 103  
Raleigh NC 27604  
(919)715-0476  
(919)715-2219 (fax)

**Mailing Address:**

1652 Mail Service Center  
Raleigh, NC 27699-1652

**North Carolina Wetlands Restoration Program (NCWRP)**

Established by the General Assembly in 1996, the North Carolina Wetlands Restoration Program (NCWRP) is an innovative, non regulatory initiative to restore wetlands, streams and nonwetland riparian areas through out the state. The Department of Environment and Natural Resources -Division of Water Quality oversees the program. The goals of NCWRP are:

- To restore functions and values lost through historic, current and future wetland and stream impacts.
- To achieve a net increase in wet-land acres, functions and values in all of North Carolina's major river basins.
- To provide a consistent approach to address mitigation that may be required by law when dredging or filling wetlands, or altering of streams, is authorized.

To increase the ecological effectiveness of required wetlands and stream mitigation, and to promote a comprehensive approach to the protection of natural resources.

The NCWRP actively seeks land owners who have restorable wetland, riparian and stream sites. For more information about the Program

**Source:**

<http://h2o.enr.state.nc.us>

**Contact:**

Bonnie Mullen  
North Carolina Wetlands Restoration  
NCWRP  
(919) 733-5208.

**Water Resources Development Grant Program**

This program is designed to provide cost-share grants and technical assistance to local governments throughout the State. Applications for grants are accepted for seven purposes: General Navigation, Recreational Navigation, Water Management, Stream Restoration, Beach Protection, Land Acquisition and Facility Development for Water-Based Recreation, and Aquatic Weed Control. There are two grant cycles per year, the application deadlines are January 1st and July 1st. Contact John Sutherland , Jeff Bruton or Darren England for additional information.

**Source:**

[http://www.ncwater.org/Financial\\_Assistance/](http://www.ncwater.org/Financial_Assistance/)

**Contact:**

NC Division of Water Resources,  
DENR  
1611 Mail Service Center  
Raleigh, NC 27699-1611  
Phone: (919)733-4064  
Fax: (919)733-3558

**Blue Cross Blue Shield Mini Grant**

The BCBSNC Foundation developed the Mini-Grants category in order to provide funding opportunities for counties that are experiencing greater levels of economic distress. The Foundation is also interested in supporting smaller non-profit organizations that provide direct services within the specified geographic region. Specifically, funding is restricted to the 85 designated rural counties across the state. Organizations with an annual operating budget of less than \$500,000 are eligible to apply.

The BCBSNC Foundation funds programs that align with its mission and established focus areas. Applicants in the Mini-Grants category will engage in a competitive process for funding. The typical range is between \$1,500 - \$5,000.

**Source:**

<http://www.bcbsnc.com/foundation/mini-grants.html>

**Contact:**

Mailing Address:  
P.O. Box 2291  
Durham, NC 27702  
General Contact:  
Phone: 919-765-7347

Fax: 919-765-2433  
 Email: foundation@bcbsnc.com

**Blue Cross Blue Shield Grant**

The BCBSNC Foundation funds programs that align with its mission and established focus areas. Applicants in the Grants up to \$25,000 category, engage in a two-step, competitive process to identify those projects that meet all required eligibility criteria and present the most compelling case for funding. The typical range is between \$5,000 - \$15,000.

**Source:**  
<http://www.bcbsnc.com/foundation/grants.html#four>

**Contact:**  
 Mailing Address:  
 P.O. Box 2291  
 Durham, NC 27702  
 General Contact:  
 Phone: 919-765-7347  
 Fax: 919-765-2433  
 Email: foundation@bcbsnc.com

**Overview Private Funding**

Many communities have solicited greenway funding assistance from private foundations and other conservation-minded benefactors. Below are two examples of private funding opportunities available in North Carolina.

**North Carolina Community Foundation**

The North Carolina Community Foundation serves philanthropic donors and supports not-for-profit organizations throughout North Carolina. The NCCF makes grants from charitable funds established by individuals, families, corporations, and non-profit organizations. Our donors make grants from over 800 funds that serve the following areas of interest:

- Arts and Humanities
- Community Service
- Education
- Environment
- Health
- Historic Preservation
- Religion
- Science
- Social Services
- Youth

**Source:**  
<http://www.nccommunityfoundation.org/>

**Contact:**  
 4601 Six Forks Road, Suite 524  
 Raleigh, North Carolina 27609  
 (919) 828-4387  
 (800) 201-9533  
 Fax: (919) 828-5495

**Duke Energy Foundation**

The Cinergy Foundation places special emphasis on projects that help communities help themselves. We support local community, civic and leadership development projects. The Cinergy Foundation also views community foundations as positive vehicles for sustaining the long-term health of a community and promoting philanthropic causes. Infrastructure needs by a community will not be considered.

The Cinergy Foundation supports health and social service programs which promote healthy life styles and preventative medical care. United Way campaigns are included in Health and Social Services funding.

**Source:**  
<http://www.cinergy.com/foundation/categories.asp>

**Contact:**  
 Rachele Caldwell  
 Manager  
 Cinergy Foundation  
 (513) 287-2363  
 (800) 262-3000 x 2363  
 The Cinergy Foundation  
 139 E. Fourth St.; EA029  
 Cincinnati, Ohio 45202

**American Greenways Eastman Kodak Awards**

Eastman Kodak, The Conservation Fund, and the National Geographic Society provide small grants to stimulate the planning and design of greenways in communities throughout America. The annual grants program was instituted in response to the President's Commission on Americans Outdoors recommendation to establish a national network of greenways. Made possible by a generous grant from Eastman Kodak, the program also honors groups and individuals whose ingenuity and creativity foster the creation of greenways. The program goals include:

- Develop new, action-oriented greenway projects
- Assist grassroots greenway organizations.
- Leverage additional money for conservation and greenway development

- Recognize and encourage greenway proponents and organizations

**Source:**

<http://www.conservationfund.org>

**Contact:**

The Conservation Fund  
[greenways@conservationfund.org](mailto:greenways@conservationfund.org)  
703-525-6300

## APPENDIX J

### References

Anderson, The Rev. Robert Campbell, D.D., *The Story of Montreat from its Beginning: 1897-1947*, Kingsport, Tenn., Kingsport Press, 1949.

Buncombe County Register of Deeds, *Montreat Conservation Easement*, 2004.

Dodson, Randy, ed., *Town-Wide Roadway Evaluation and Parking Study, Town of Montreat, North Carolina*, Martin & Craig, Inc., 2000.

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Town of Montreat, *Study and Zoning Plan for a Proposed Area of Extraterritorial Planning and Regulation of Development by the Town of Montreat, North Carolina*, Montreat Planning and Zoning Commission, 1992.

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Town of Montreat, *Zoning Ordinance for the Town of Montreat*, 2005.

Town of Montreat, *Parking and Traffic Analysis for the Town of Montreat*, The Land-of-Sky Regional Council, 1982.

Town of Montreat, *Town of Montreat Capital Improvement Program Fiscal Years 2006-2011*, 2006.

Town of Montreat, *Town of Montreat Flood Damage Prevention Ordinance*, 2005.

Town of Montreat, *Phase II Stormwater Ordinance for Montreat*, North Carolina, 2006.

# Town of Montreat Comprehensive Plan Implementation Matrix

## **IMPLEMENTATION MATRIX**

The Implementation Matrix is composed of a series of “action” items, or strategies, which are tied to the goals and recommendations contained in the Comprehensive Plan. This matrix was created to be used during the upcoming implementation phase, following the adoption of the Comprehensive Plan. Those participating in the monitoring of implementation activities and measuring progress will have this available as a type of worksheet, a starting point in an exercise of prioritizing activities.

The recommended timing for each proposed strategy is categorized as “short-term,” “mid-term,” or “long-term,” as determined by those individuals responsible for implementing the Comprehensive Plan. Short-term implementation strategies are meant to be completed within the first year of the new Comprehensive Plan. Mid-term implementation strategies are meant to be completed within two to five years. Long-term implementation strategies are to be completed in five-plus years. Those responsible for creating a strategic implementation plan are encouraged to do a thorough evaluation of the priorities indicated based on budget constraints and other relevant circumstances.

## **GOALS**

Given the existing conditions in Montreat today, a set of goals for the town's future was established through the community involvement process. These goals were used to guide the development of the Comprehensive Plan. Collectively, these goals establish a framework for policy initiatives created to implement the various objectives and initiatives that are found in the Recommendations & Implementation Strategies section of the plan. These goals are not organized in the order of priority, all goals are equally important. However, the implementation strategies outlined in section 3.3 are aimed at achieving these goals. Future prioritization of the strategies will be a reflection of the importance the community places on achieving each goal. Recommendations and strategies are tied to specific goals, represented by a corresponding letter (below and in section 3.1 of Montreat Tomorrow), in the Implementation Matrix.

- A. The Town of Montreat will recognize the need for adaptive and constructive management of new development and redevelopment of land and structures in the community while preserving the character, quality of life, and natural beauty of the town.
- B. Maintain the natural integrity of the Conservation Easement and Ridgeline Protection ordinance while integrating passive recreation areas.
- C. Preserve the character of both the natural and the man-made environments while providing for the development and redevelopment of existing residential areas by developing and adopting standards for both land and building development that preserves and enhances the community's image while providing for responsible growth.
- D. Preserve the character of both the natural and the man-made environments while providing better circulation for all modes of transportation in the Assembly Drive corridor.
- E. Manage growth in the outlying areas in a manner that protects views and the character of the natural environment while providing opportunities for variations in housing form and layout.
- F. Focus and facilitate community activities, new development opportunities, and more intense uses into the town's center.
- G. Provide for safe and reliable water supply matched to the needs of the community and designed to serve future development and redevelopment.

- H. Provide efficient and reliable services to the citizens of Montreat that will accommodate future growth and limit damage from local erosion and flooding while complying with state and federal water quality requirements.
- I. Maintain a balanced network of streets, pathways and trails that accommodates the mobility needs of the residents, visitors and students whether they travel by vehicle, bicycle or foot while providing safe access to the properties in the community.
- J. Create a highly interconnected system of non-vehicular circulation routes to provide connectivity to community destinations with minimal disturbance to vegetation.
- K. Improve parking efficiency in the Town Center and establish standards for better parking management in areas outside the Town Center.
- L. Identify sources of funding for general fund and earmarked expenditures focused on the implementation of the community's plans to manage growth and investigate alternative revenue sources to supplement the town's budget, reduce dependence on real property taxes and seek opportunities to expand the tax base with new development consistent with the protection of the character of the community.
- M. The town should seek opportunities to coordinate and cooperate with the MRA and Montreat College on matters of common interest, including the joint use of facilities, use of land for multiple purposes, the accommodation of the needs of all three parties, and protecting the character and quality of life of the community.
- N. The town will embrace opportunities for alternative forms of land development and housing types to broaden the range of housing choices for its citizens, visitors, students and faculty, and retirees while protecting the character of the community.
- O. The town should allow limited commercial development to allow for the daily needs of its citizens, visitors, students, and faculty and to provide a focus for other community activities while protecting the character of the community.

## CHARACTER & DESIGN STRATEGIES FOR IMPLEMENTATION

<i>Goals(s)</i>	<i>Recommendations</i>	<i>Implementation Strategies</i>	<i>Short-Term</i>	<i>Mid-Term</i>	<i>Long-Term</i>
A, C	<b>Recommendation 1:</b> Increase the possibility of preserving structures that are of historic significance in the town.	<b>Strategy 1:</b> Evaluate the advantages and disadvantages of a local historic district.  <b>Strategy 2:</b> Create a mechanism for educating property owners about the value of historic structures, particularly their value to the town, and raise awareness of losses, of potential losses and the negative impacts of the losses of historic structures.			
A	<b>Recommendation 2:</b> Ensure that areas outside of the town limits but within the ETJ are preserved.	<b>Strategy 1:</b> Evaluate the official zoning map and determine the extent to which the zoning provides the protection for this land as envisioned in the comprehensive plan.  <b>Strategy 2:</b> Update the zoning map to ensure all zoning districts are clearly delineated.  <b>Strategy 3:</b> Revisit the uses in the Woodlands and R-3 and determine whether the permitted use lists require revisions to adequately manage growth outside of the town.  <b>Strategy 4:</b> Evaluate the need for a new zoning district for the areas beyond the town limits to better manage growth.			
A, C	<b>Recommendation 3:</b> Guide the design of new and renovated structures in existing neighborhoods to foster consistency in scale, style, materials and design with the existing built form	<b>Strategy 1:</b> Create architectural design guidelines for new and renovated houses to preserve character.  <b>Strategy 2:</b> Create architectural design guidelines for the Town Center area that will promote design that is in accordance with the overall character of its surroundings.			

	that is characteristic of Montreat.	<p><b>Strategy 3:</b> Create a “Montreat Manual” to serve as an illustrated guide for basic land development standards to address design principles for locating structures (orientation and placement), fences, walls, and materials throughout the town.</p> <p><b>Strategy 4:</b> Modify zoning ordinance to ensure that new homes conform to the setbacks of existing structures to provide visual continuity.</p>			
D	<b>Recommendation 4:</b> Preserve the character of Assembly Drive.	<p><b>Strategy 1:</b> Create an Overlay District that allows for a variety of uses, such as institutional (e.g. church), mixed-use, residential and services.</p> <p><b>Strategy 2:</b> Set standards for the Overlay District that includes:</p> <ul style="list-style-type: none"> <li>• Minimum setbacks (whichever is more stringent of the following) <ul style="list-style-type: none"> <li>○ Minimum setback of 100 feet from centerline</li> <li>○ Average setback of the two adjoining structures</li> </ul> </li> <li>• Building height less than two stories or 35 feet</li> <li>• Preservation of existing vegetation</li> <li>• Incorporate provisions for the replacement of trees (e.g. require two new trees replace each mature tree taken down).</li> </ul>			
A, E, N	<b>Recommendation 5:</b> Promote a compact form of development.	<p><b>Strategy 1:</b> Modify the town’s zoning ordinance to allow for a more compact form of development through flexibility in the requirements governing minimum lot size, yards, etc.</p> <p><b>Strategy 2:</b> Add Conservation Subdivision design and clustering standards as options in the subdivision ordinance.</p>			
A, C	<b>Recommendation 6:</b> Improve hillside development regulation language to further protect environmentally sensitive areas and existing views for proposed	<b>Strategy 1:</b> Establish a height limit for non-residential structures to a 60-foot maximum (measured as the vertical distance of a building / structure as measured from the average elevation of the ground level at the structure foundation to the uppermost point of the roof) or limit the height of the proposed building so that it cannot exceed the tallest existing tree canopy on the lot, whichever is the most stringent application.			

	<p>developments that are less than a 25% grade slope.</p>	<p><b>Strategy 2:</b> Evaluate the possibility of establishing a maximum disturbance and maximum impervious cover similar to Buncombe County's Zoning Ordinance as outlined in the dimensional requirements (Section 78-642).</p>																											
<p>A, C</p>	<p><b>Recommendation 7:</b>          Improve hillside development regulation language to further protect environmentally sensitive areas and existing views for proposed developments that are equal to or greater than a 25% grade slope.</p>	<p><b>Strategy 1:</b> Evaluate the possibility of applying more stringent regulations on slopes greater than 25%.</p> <p><b>Note:</b> Consider maximum disturbance and maximum impervious regulations outlined in Buncombe County's Zoning Ordinance (Hillside Development Standards 70-68(e)), which is outlined below:</p> <ul style="list-style-type: none"> <li>• <b>Maximum disturbance:</b> <ul style="list-style-type: none"> <li>Sites with 25 to 35 percent slopes               <ul style="list-style-type: none"> <li>Maximum gross site area disturbed = 30 percent</li> <li>Maximum gross site area impervious = 15 percent</li> </ul> </li> <li>Sites greater than 35 percent slopes               <ul style="list-style-type: none"> <li>Maximum gross site area disturbed = 15 percent</li> <li>Maximum gross site area impervious = 8 percent</li> </ul> </li> </ul> </li> </ul> <p><b>Note:</b> Consider utilizing a density-scale similar to Buncombe County's Zoning Ordinance (Hillside Development Regulations 70-68(d)) that will gradually reduce the permissible density of a site based upon incremental increases in slope percentages, which is indicated below:</p> <table border="1" data-bbox="1016 1092 1583 1330"> <thead> <tr> <th>SLOPE %</th> <th>UNITS PER ACRE</th> <th>MINIMUM LOT IN ACRES</th> </tr> </thead> <tbody> <tr> <td>25</td> <td>1.250</td> <td>0.80</td> </tr> <tr> <td>26</td> <td>1.064</td> <td>0.94</td> </tr> <tr> <td>27</td> <td>0.926</td> <td>1.08</td> </tr> <tr> <td>28</td> <td>0.820</td> <td>1.22</td> </tr> <tr> <td>29</td> <td>0.735</td> <td>1.36</td> </tr> <tr> <td>30</td> <td>0.667</td> <td>1.5</td> </tr> <tr> <td>31</td> <td>0.625</td> <td>1.6</td> </tr> </tbody> </table>	SLOPE %	UNITS PER ACRE	MINIMUM LOT IN ACRES	25	1.250	0.80	26	1.064	0.94	27	0.926	1.08	28	0.820	1.22	29	0.735	1.36	30	0.667	1.5	31	0.625	1.6			
SLOPE %	UNITS PER ACRE	MINIMUM LOT IN ACRES																											
25	1.250	0.80																											
26	1.064	0.94																											
27	0.926	1.08																											
28	0.820	1.22																											
29	0.735	1.36																											
30	0.667	1.5																											
31	0.625	1.6																											

			33	0.556	1.8
			34	0.526	1.9
			35	0.500	2.0
			36	0.476	2.1
			37	0.455	2.2
			38	0.435	2.3
			39	0.417	2.4
			40	0.400	2.5
			41	0.385	2.6
			42	0.370	2.7
			43	0.357	2.8
			44	0.345	2.9
			45	0.333	3.0
			46	0.323	3.1
			47	0.313	3.2
			48	0.303	3.3
			49	0.294	3.4
			50	0.286	3.5
			51	0.278	3.6
			52	0.270	3.7
			53	0.263	3.8
			54	0.256	3.9
			55	0.250	4.0
			56	0.217	4.6
			57	0.192	5.2
			58	0.172	5.8
			59	0.156	6.4
			60	0.143	7.0
			61	0.132	7.6
			62	0.122	8.2
			63	0.114	8.8
			64	0.106	9.4
			65	0.100	10
			As the table and the definition of hillside area indicate, any proposed development whose average natural slope is less than 25 percent is not subject to the regulations for permitted density as set forth herein. Any proposed development which meets the definition of hillside area and whose average natural slope is above 65 percent is subject to the most restrictive percent labeled on the maximum density scales.		

C	<p><b>Recommendation 9:</b> Continue to protect the environment by collaborating with the National Wildlife Federation and state agencies to promote awareness about the unique wildlife habitat found in the planning area.</p>				
D	<p><b>Recommendation 10:</b> Improve signage and monumentation to aid in circulation and wayfinding.</p>	<p><b>Strategy 1:</b> Institute a committee that will establish guidelines and oversee the process of signage design, monument design and wayfinding.</p> <p><b>Strategy 2:</b> Identify critical locations where the placement of signs and/or monumentation will add to the character of that area and also help in orientation for visitors by identifying key buildings, structures and uses.</p>			

**MANAGEMENT OF GROWTH STRATEGIES FOR IMPLEMENTATION**

<i>Goals(s)</i>	<i>Recommendations</i>	<i>Implementation Strategies</i>	<i>Short-Term</i>	<i>Mid-Term</i>	<i>Long-Term</i>
	<p><b>Recommendation 1:</b> Implement the Comprehensive Plan.</p>	<p><b>Strategy 1:</b> Subcommittees shall be formed for various topic areas and volunteers, including some Comprehensive Plan Steering Committee members, will be recruited to serve as the “Implementation Committee” to execute the various recommendations and implementation strategies as prioritized by the Implementation Committee.</p> <p><b>Strategy 2:</b> Adopt new regulations and improve existing regulations as mentioned throughout in this section to address Montreat’s issues and opportunities.</p> <p><b>Strategy 3:</b> Update the Comprehensive Plan on a regular basis and no less than every five years to address the changing needs of the community.</p>			

### TAX BASE & REVENUE SOURCES STRATEGIES FOR IMPLEMENTATION

<i>Goals(s)</i>	<i>Recommendations</i>	<i>Implementation Strategies</i>	<i>Short-Term</i>	<i>Mid-Term</i>	<i>Long-Term</i>
L	<b>Recommendation 1:</b> Investigate and consider alternative sources of revenue.	<b>Strategy 1:</b> Expand the potential sources of revenue to include user fees, special assessments, negotiated payments in lieu of taxes, and facility fees.			
L	<b>Recommendation 2:</b> Consider new taxes, such as the real estate transfer tax and/or occupancy tax, to supplement tax revenues already being collected.	<b>Strategy 1:</b> Request the state grant Montreat the ability to levy- and the county grant Montreat the approval to create a ballot initiative for the right to levy- a Real Estate Transfer Tax.  <b>Strategy 2:</b> Request the state grant Montreat the ability to levy an occupancy tax, or similar fees, on lodging / rentals.			
L	<b>Recommendation 3:</b> Consider new fees for vehicle permits, parking permits, building permits, inspection fees, or privilege license fees on certain businesses. ( <i>See also Vehicle Mobility Recommendation 4, Parking Recommendation 6 and Infrastructure Recommendation 2.</i> )				
L	<b>Recommendation 4:</b> Consider retaining the services of a grants specialist to seek grants from both public and private entities that may be available and	<b>Strategy 1:</b> Coordinate with the Land of the Sky Council of Governments or a similar entity to seek help in grant writing.			

	appropriate for specific needs.				
L	<b>Recommendation 5:</b> Expand the tax base by increasing the amount of taxable property.	<b>Strategy 1:</b> Encourage public / private partnerships to joint venture on opportunities to build taxable student housing, parking structures and/or other facilities on land currently owned by the tax-exempt institutions.			
L	<b>Recommendation 6:</b> Seek special legislation to mitigate the impact of loss of revenue due to the conservation easement.	<b>Strategy 1:</b> Coordinate with League of Municipalities and investigate the opportunities to collaborate with municipalities with similar constraints and draft a bill to identify means to generate funding.			

**IMPACT OF THE MRA AND COLLEGE STRATEGIES FOR IMPLEMENTATION**

<i>Goals(s)</i>	<i>Recommendations</i>	<i>Implementation Strategies</i>	<i>Short-Term</i>	<i>Mid-Term</i>	<i>Long-Term</i>
M	<b>Recommendation 1:</b> Create opportunities where the major institutions in Montreat may collaborate for common purposes.	<p><b>Strategy 1:</b> Explore joint venture opportunities between the town, MRA and Montreat College that could lead to the co-development of facilities shared by the institutions or the co-development of facilities with the private sector, including structures and parking.</p> <p><b>Strategy 2:</b> As identified in Recommendation 5 in the Tax Base &amp; Revenue section, the town should encourage the public / private partnership between various institutions and private developers by providing incentives such as density bonuses, the contribution of land or funds, or through the acceleration of the approval process.</p> <p><b>Strategy 3:</b> Investigate opportunities to identify a location for a new town hall in collaboration with the MRA and Montreat College as they expand, renovate or add to their existing facilities.</p>			

## HOUSING STRATEGIES FOR IMPLEMENTATION

<i>Goals(s)</i>	<i>Recommendations</i>	<i>Implementation Strategies</i>	<i>Short-Term</i>	<i>Mid-Term</i>	<i>Long-Term</i>
C	<b>Recommendation 1:</b> Maintain a predominantly single-family residential land use at an overall density of four DUA.	<b>Strategy 1:</b> Maintain the permitted uses at the permitted density for the R-1 and R-3 districts in the existing zoning regulations.  <b>Strategy 2:</b> Consider only amendments to the official Zoning Map that result in the reduction of the R-1 and R-3 districts if such amendments are consistent with the Comprehensive Plan.			
E, N	<b>Recommendation 2:</b> Provide as an option an alternative to conventional subdivision: cluster or conservation development patterns where possible to preserve the natural environment.	<b>Strategy 1:</b> Modify the zoning ordinance and subdivision ordinances to allow for conservation subdivision by right for the outlying areas as identified in Figure #7, the Proposed Town-Wide Plan.  <b>Strategy 2:</b> Modify the minimum lot size requirements in the zoning ordinance / subdivision ordinance to allow for the flexibility in lot dimensions to encourage conservation subdivision.			
E, N	<b>Recommendation 3:</b> Allow for higher densities to encourage the use of conservation subdivision / cluster subdivision development.	<b>Strategy 1:</b> Consider density bonuses to developers who use the conservation subdivision approach to encourage this form of development pattern.			
E, N	<b>Recommendation 4:</b> Allow a variety of residential dwelling types within	<b>Strategy 1:</b> Modify the zoning ordinance to allow for attached housing as part of conservation subdivision approach in residential districts R1 and R3.			

	<p>Montreat to increase housing diversity.</p>	<p><b>Strategy 2:</b> Modify the zoning ordinance to allow for townhomes, especially within the Town Center 3 area (see section 3.2 for a detailed description), to allow for higher density residential near the core of the town.</p> <p><b>Strategy 3:</b> Allow for student housing in Town Center 2 area.</p>			
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**COMMERCIAL SERVICES STRATEGIES FOR IMPLEMENTATION**

<i>Goals(s)</i>	<i>Recommendations</i>	<i>Implementation Strategies</i>	<i>Short-Term</i>	<i>Mid-Term</i>	<i>Long-Term</i>
O	<p><b>Recommendation 1:</b> Adopt land development standards and controls that allow service uses in appropriate areas but still protect the image and character of the community.</p>	<p><b>Strategy 1:</b> Modify the zoning ordinance to allow for service uses in appropriate locations as noted on Figure #7, the Proposed Town-Wide Plan.</p> <p><b>Strategy 2:</b> Define a town center district and add to the zoning ordinance and zoning map.</p>			

### TRANSPORTATION (VEHICULAR MOBILITY) SERVICES STRATEGIES FOR IMPLEMENTATION

<i>Goals(s)</i>	<i>Recommendations</i>	<i>Implementation Strategies</i>	<i>Short-Term</i>	<i>Mid-Term</i>	<i>Long-Term</i>
I	<b>Vehicular Mobility Recommendation 1:</b> Maintain existing streets.	<b>Strategy 1:</b> Continue the program of street maintenance and upgrades of existing streets.			
I	<b>Vehicular Mobility Recommendation 2:</b> Evaluate platted but non-built streets for abandonment if no future need is identified.	<b>Strategy 1:</b> Inventory all platted but non-built streets on a map.  <b>Strategy 2:</b> Rank all platted but non-built streets in decreasing order by usage so that future needs may be identified and priorities may be set for those roads which could be abandoned.			
I	<b>Vehicular Mobility Recommendation 3:</b> Evaluate placing weight limits on streets to minimize the impacts of heavy vehicles, which can damage streets.	<b>Strategy 1:</b> Conduct a geotechnical study to evaluate the acceptable weight that the existing roads in the town could handle.  <b>Strategy 2:</b> Institute a permit system that is administered by the town which requires vehicles above the acceptable weight to be charged a fee to offset the maintenance cost associated with the wear and tear of roads from such traffic.			
D, I	<b>Vehicular Mobility Recommendation 4:</b> Evaluate a vehicle permit system for all vehicles to offset street maintenance costs and manage peak flows.	<b>Strategy 1:</b> Conduct a vehicle count study to assess the actual peak flow during busy summer months and Sunday mornings.  <b>Strategy 2:</b> In collaboration with the MRA, Montreat College and the Presbyterian Church, and based on the vehicle count study, the town can evaluate the possibility of creating a permit system that charges a nominal			

		fee for visitors' vehicles coming into Montreat on a daily or weekly basis.			
D	<b>Vehicular Mobility Recommendation 5:</b> Evaluate street design to create features for transition, especially in the Town Center area.	<b>Strategy 1:</b> Identify key areas that lend themselves as transition points in the community, especially in areas of increased pedestrian activity to slow vehicular traffic.			
I	<b>Vehicular Mobility Recommendation 6:</b> Decrease congestion by encouraging partnerships between the MRA, Montreat College and the Town of Black Mountain by utilizing Mountain Mobility or a shuttle service(s).	<b>Strategy 1:</b> Coordinate with Mountain Mobility and the Town of Black Mountain to establish shuttle services that will cater to visitors and residents during peak summer months and will provide alternatives to using personal automobiles.			

**TRANSPORTATION (NON-VEHICULAR MOBILITY) SERVICES STRATEGIES FOR IMPLEMENTATION**

<i>Goals(s)</i>	<i>Recommendations</i>	<i>Implementation Strategies</i>	<i>Short-Term</i>	<i>Mid-Term</i>	<i>Long-Term</i>
D, I, J	<b>Non-Vehicular Mobility Recommendation 1:</b> Provide better mobility within the Town Center.	<b>Strategy 1:</b> Connect key destinations (such as Assembly Inn, Anderson Auditorium, and Montreat College) via a network of pedestrian linkages.			

D, I, J	<p><b>Non-Vehicular Mobility Recommendation 2:</b> Define, prioritize and construct an improved pedestrian network for the greater town area.</p>	<p><b>Strategy 1:</b> To provide the greatest benefit, prioritize the trails that will need to be constructed according to the pedestrian network as detailed in Figure #7.</p> <p><b>Strategy 2:</b> Provide connections to the Black Mountain Trail along Assembly Drive by widening, improving and maintaining the existing path or by building six-foot to eight-foot pathways for hiking and biking along Flat Creek.</p> <p><b>Strategy 3:</b> Seek funding from potential national, state and private sources to aid with the design and construction of pathways and greenways throughout the planning area.</p> <p><b>Strategy 4:</b> Coordinate with NCDOT and the Town of Black Mountain to explore a bike and pedestrian connection beyond Montreat’s incorporated boundaries</p>			
B, I, J	<p><b>Non-Vehicular Mobility Recommendation 3:</b> Provide connections to the Wilderness Trails.</p>	<p><b>Strategy 1:</b> Coordinate with the Wilderness Committee and consider its recommendations as to where the town should provide connections to the Wilderness Trails.</p> <p><b>Strategy 2:</b> Identify and prioritize connections to the Wilderness Trails.</p>			
B, J	<p><b>Non-Vehicular Mobility Recommendation 4:</b> Provide additional pedestrian and bicycle opportunities.</p>	<p><b>Strategy 1:</b> Improve pedestrian and bicycle connectivity to residential neighborhoods, especially along Harmony Road, Lookout Road, and Assembly Drive, as these roads are major connections to existing neighborhoods.</p>			

D, I, J	<p><b>Non-Vehicular Mobility Recommendation 5:</b> Provide space for bicycle traffic along Assembly Drive.</p>	<p><b>Strategy 1:</b> Evaluate the feasibility of a bike lane on the Assembly Drive by narrowing the vehicular lane. This will further slow the traffic on the Assembly Drive and make it safer.</p>			
D, I	<p><b>Non-Vehicular Mobility Recommendation 6:</b> Provide conveniently located bike racks.</p>	<p><b>Strategy 1:</b> Identify appropriate locations of bike racks, such as near Assembly Inn, near potential Plaza/Town Square, near Anderson Auditorium, and close to the larger dorms and educational facilities of Montreat College and work with the institutions to determine the most equitable sharing of the responsibilities for providing the racks.</p>			
B, I	<p><b>Non-Vehicular Mobility Recommendation 7:</b> Establish a fund devoted to pedestrian amenities.</p>	<p><b>Strategy 1:</b> Identify pedestrian amenities such as benches, wayfinding signage, etc. that will promote a better walking environment and will encourage visitors and residents to make short trips on foot.</p> <p><b>Strategy 2:</b> Coordinate with the Land of Sky Council of Governments to identify various sources of funding that are available to offset funding for pedestrian amenities.</p> <p><b>Strategy 3:</b> Continue coordination with the various wilderness committees to identify sources of funding through private donations.</p> <p><b>Strategy 4:</b> Encourage the community to “take ownership” of nearby facilities by “adopting a pathway” to help offset some of the costs associated with the maintenance of pedestrian amenities.</p>			

## TRANSPORTATION (PARKING) SERVICES STRATEGIES FOR IMPLEMENTATION

<i>Goals(s)</i>	<i>Recommendations</i>	<i>Implementation Strategies</i>	<i>Short-Term</i>	<i>Mid-Term</i>	<i>Long-Term</i>
K	<b>Parking Recommendation 1:</b> Reconfigure existing parking areas for improved efficiency.	<b>Strategy 1:</b> Conduct a study that will evaluate existing parking areas, and redesign them to achieve a higher number of parking spaces.			
K, M	<b>Parking Recommendation 2:</b> Encourage joint ventures between public and private entities to build additional parking facilities.	<b>Strategy 1:</b> Identify projects, such as the building of student dormitories and other lodging that could present opportunities to build additional parking which could be shared by public and private entities.  <b>Strategy 2:</b> Identify the means that would encourage private entities to build additional parking facilities in Montreat through the contribution of land or funds, incentives such as density bonuses or through the acceleration of the approval process.			
K	<b>Parking Recommendation 3:</b> Permit and encourage “table-top” parking where feasible to take advantage of topography.				
K, M	<b>Parking Recommendation 4:</b> Create a satellite parking system with shuttle service.	<b>Strategy 1:</b> Coordinate with the Town of Black Mountain to identify potential locations in the Town of Black Mountain that could be used for satellite parking during peak seasons.  <b>Strategy 2:</b> Work with the MRA and Montreat College to establish a			

		shuttle service shared by and supported by all three entities ( <i>See Vehicular Recommendation 6</i> ).			
K	<b>Parking Recommendation 5:</b> Require adequate off-street parking in residential areas.	<b>Strategy 1:</b> In addition to the requirement for off-street parking based on the square footage of the residential unit, require off-street parking based on the number of bed-rooms, whichever is higher.			
K	<b>Parking Recommendation 6:</b> Consider parking permits and parking fees to offset street maintenance costs.	<b>Strategy 1:</b> Assign parking permits to residents of Montreat for a nominal fee on a yearly basis.  <b>Strategy 2:</b> Charge parking fees from visitors on a daily and/or weekly basis.			
D, I	<b>Parking Recommendation 7:</b> Improve pedestrian access between parking areas and destinations.	<b>Strategy 1:</b> Create pedestrian pathways that connect existing and future key buildings to existing and future major parking lots.			
K	<b>Parking Recommendation 8:</b> Provide better signage to direct visitors to parking locations.	<b>Strategy 1:</b> Create signage at key locations, such as at the intersection of Lookout Road and Assembly Drive (as shown in Figure #10), that identifies the location of key buildings and places in Montreat and directs residents and visitors to nearby parking locations.			

## INFRASTRUCTURE STRATEGIES FOR IMPLEMENTATION

<i>Goals(s)</i>	<i>Recommendations</i>	<i>Implementation Strategies</i>	<i>Short-Term</i>	<i>Mid-Term</i>	<i>Long-Term</i>
G	<b>Recommendation 1:</b> Although storage capacity is sufficient for current usage, identify and pursue additional well sites and storage facilities to meet future demand.	<b>Strategy 1:</b> Investigate the possibility of additional well locations within the conservation easement by discussing this situation with Southern Appalachian Highland Conservancy and the MRA.			
G	<b>Recommendation 2:</b> Identify additional water sources needed to provide efficient flow and service for future fire emergencies.	<b>Strategy 1:</b> Determine the additional peak time capacity needed to handle future fire emergencies.  <b>Strategy 2:</b> Study the “build-out” scenario to determine peak demand or set limits on what may be built to limit future demand.  <b>Strategy 3:</b> Identify reasonable sources to best serve that demand and evaluate the feasibility of each option.			
G	<b>Recommendation 3:</b> Require users who drive peak demand to offset the costs of an expanded system.	<b>Strategy 1:</b> Collaborate with the MRA and Montreat College to determine the impact on the water system during the peak season and identify the means to mitigate or offset costs of improvement.			
G	<b>Recommendation 4:</b> Consider new and expanded water service and how it will	<b>Strategy 1:</b> Consider special capital facility fees for new or expanded water service.			

	be funded.	<b>Strategy 2:</b> Explore opportunities for joint venture with the Town of Black Mountain to increase existing capacity and flow of water compared to the costs of well system expansion.			
G	<b>Recommendation 5:</b> Establish or continue programs for compliance with state and federal water quality requirements, as well as to limit damage from local erosion and flooding.	<b>Strategy 1:</b> Enforce stormwater standards that meet federal and state requirements.			
A, C	<b>Recommendation 6:</b> Identify and enact a dedicated funding source (e.g. stormwater fees) for system improvements.	<b>Strategy 1:</b> Adopt new stormwater standards that are accompanied by a fee structure designed to offset operating costs and debt service for the new stormwater program.			