

City of Statesville

unified development code

Response to Request for Qualifications

March 25, 2024

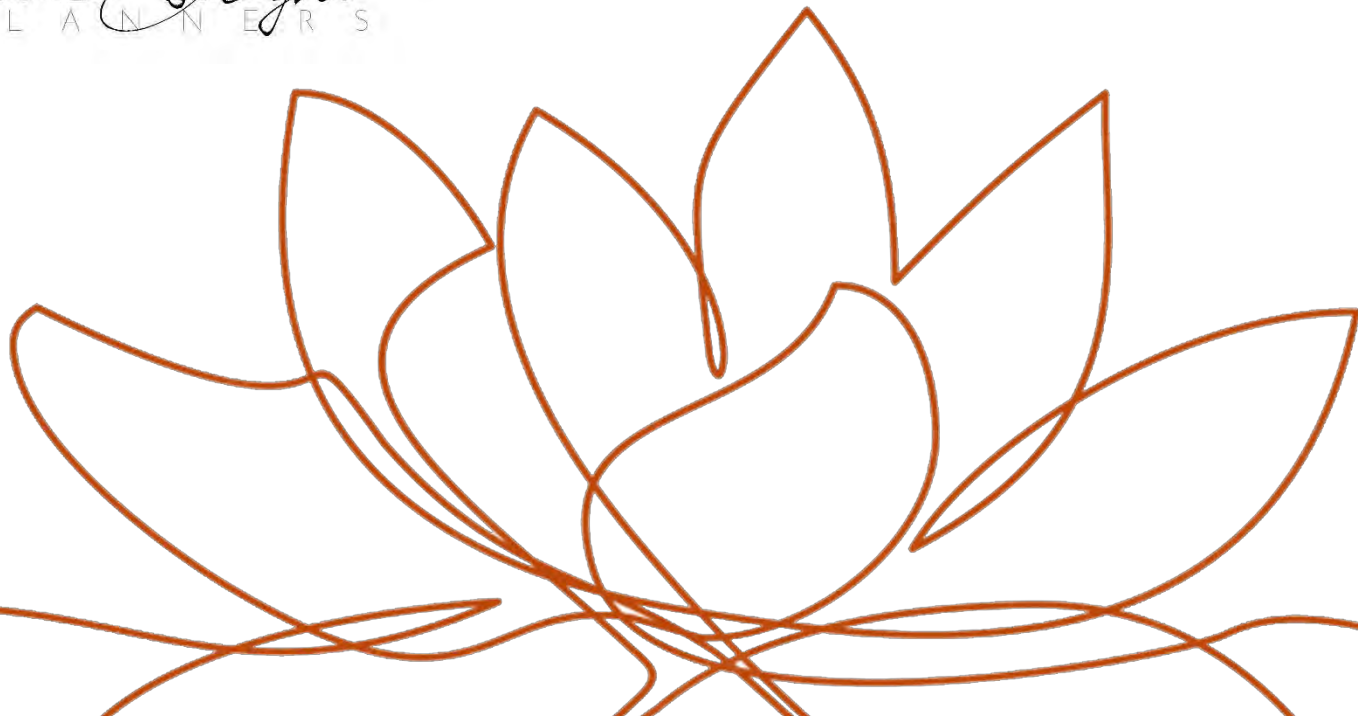




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March 25, 2024

Sherry Ashley, Planning Director
227 S. Center St., Statesville, NC 28687
(via electronic delivery to sashley@statesvillenc.net)



Dear Ms. Ashley,

Thank you for the opportunity to submit a response to the City's request for proposals to assist with the update, modernization, and codification of its Unified Development Code. CodeWright Planners, LLC is a planning consultancy specializing in drafting land use regulations. We are passionate about preparing clear, graphically-driven, and effective development codes that are predictable, easy to administer, and encourage sustainable development. Over the past 10 years, CodeWright has drafted land development regulations for more than 30 communities throughout North Carolina.

We believe we are uniquely suited to assist the City of Statesville with this project because:

- We are experts at code drafting – it is our core practice, not a sideline or an add-on;
- We track North Carolina legislation - and have a robust knowledge of North Carolina General Statutes;
- We are well-versed with national best practices - and incorporate these ideas into your regulations;
- We use multiple methods of outreach – opportunities for engagement come at the right times and with the right level of detail;
- We use numerous illustrations and tables – no other firm in North Carolina has prepared more graphically-driven regulations;
- We are committed to our clients – we see our projects through adoption and provide continuing services as desired.

CodeWright is joined in this response by Neighboring Concepts, a community-focused architecture firm based in Charlotte. Neighboring Concepts will bring their expertise and passion for establishing attainable housing. We understand that the City is seeking a modern development code that implements the 2045 Land Development Plan, is easy to read and administer, is consistent with State law and court precedent, and that helps facilitate desired growth. This response includes a seven-task scope of services (see Pages 7-16) with a proposed schedule of 24 months, and a not-to-exceed price of \$187,500.

If selected, I would serve as the Project Manager and day-to-day contact. I am authorized to bind the firms. We have no conflicts of interest, judgements, or pending litigation. On behalf of the CodeWright team, we very much hope for the opportunity to work with the City of Statesville.

Warmly,

A handwritten signature in black ink that reads "Chad Meadows". The signature is stylized and cursive.

Chad Meadows, AICP
Principal, CodeWright Planners

Prime Consultant

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Sub-Consultant

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PART A * PROJECT UNDERSTANDING



Statesville is a community of more than 28,000 people at the crossroads of I-77 and I-40 within the rapidly growing Charlotte-Concord-Gastonia Metropolitan Statistical Area (MSA). Statesville is the county seat and the center of government for Iredell County. The City was established in 1787 and began life as an agricultural center, but quickly became a center for commerce with deployment of the railroad by the mid 1850's. Today the City's central location equidistant from Charlotte, Winston-Salem, and Hickory make it a desirable location for economic activity.

Given its close proximity to the Charlotte Metro and Piedmont Triad, as well as a strategic location near major interstates, and the Norfolk Southern and Alexander railroads, Statesville is a prime location for business relocation and redevelopment. At the same time, the community features and facilities in Statesville (proximity to Lake Norman, two hospitals, a community center, regional airport, four golf courses, etc.) have made Statesville a desirable place to live.

In fact, over the last decade, over 4,000 people have moved to Statesville. The City has added over 4,600 new dwelling units since 2010, along with millions of square feet of new industrial space. While this kind of growth and development is desirable, the City is seeing increased growth pressures at its periphery, while the core has struggled to attract new investment. Most of the new residential development has taken the form of low-density, single-use, single-family detached homes at low-to-moderate densities in suburban locations.

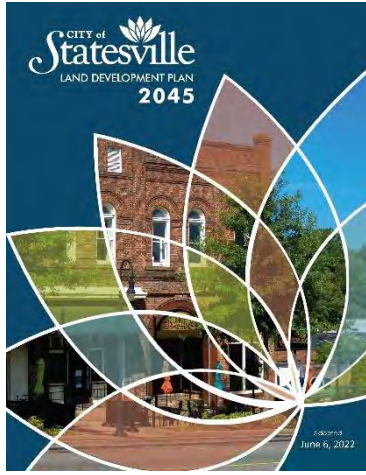
Statesville benefits from a diverse array of land use policy and related guidance, including:

- The 2045 Land Development Plan;
- A 5-year Strategic Plan - 2023-2028;
- The Route 2 Recreation Master Plan (2022);
- A Real Estate Market Analysis (2020);
- A 2019 Mobility & Development Plan; and
- A Downtown and NC 115 Streetscape/Land Use Plan from 2009.

The City's new Strategic Plan confirms that Statesville will work to be a vibrant regional center that provides a higher quality of life for all. The Plan seeks to maintain and expand public infrastructure to accommodate future growth, expand access to cultural and recreational amenities, and broaden the range of housing opportunities for residents.

Many of the City's policy guidance documents describe the phenomenon of peripheral growth combined with investment challenges in the core. All recognize the City's recent growth trends and explore ways to efficiently accommodate anticipated growth in the coming years.

PART A * PROJECT UNDERSTANDING



In response to shifting market conditions and a desire to make Statesville more competitive in attracting new investment, the City adopted the 2045 Land Development Plan in 2022 to guide land use in support of a growing local economy and a more resilient future. The Plan sets out a vision for a community that prioritizes growth and investment, supports expansion of the economy, and enhances the quality of life.

The Plan includes a series of important goals for land use decisions, such as:

- Maintaining a sustainable mix of land uses in and around the City through effective, coordinated growth management;
- Identification of New Development Focus Areas such as around the Statesville Regional Airport;
- Prioritized growth in the Redevelopment Focus Areas through development incentives and public investment;
- Emphasis on redevelopment and character protection along the City's gateway corridors;
- Promoting infill, redevelopment, and adaptive reuse of existing structures in established neighborhoods; and
- Establishing a broader range of by-right housing choices in accordance with changing economic trends and consumer preferences.

In addition to land use goals, the Plan also included a map showing 14 different land use and character areas around the City which serve as a guide for changes to the current zoning districts. This information also helps City officials weigh requests for changes to the City's Official Zoning Map

One important part of the 2045 Land Development Plan was the preparation of a Unified Development Code (or "UDC") analysis. The analysis cites Plan Action #22, which includes the following nine recommendations for changes to the UDC:

1. Update the zoning districts in accordance with the Land Use and Character section.
2. Develop user-friendly flowcharts for each development review process.
3. Include listed guidelines for rezoning cases.
4. Improve multifamily design standards.
5. Codify standards for apartment buildings or complexes, mixed use buildings, and accessory dwellings.
6. Add guidelines and standards for quality infill development.
7. Create incentives for redevelopment within strategic redevelopment focus areas.
8. Consider creating form-based overlay districts for gateway corridors.
9. Add guidelines or standards for transitions between different development intensities or use categories.

The analysis also includes three additional objectives for the revisions to the UDC, including:

- Making the code more "user-friendly" and procedurally-efficient;
- Revise, simplify, and modernize the zoning district structure; and
- Ensure recent UDC revisions are consistent with State and federal law.

This analysis is a unique feature of a land use plan and provides a good starting point for discussion about changes to the UDC to implement the Plan as well as to bring the UDC into closer alignment with best practices.

PART A * PROJECT UNDERSTANDING

In February, the City issued a Request for Qualifications for an update of the City's current Unified Development Code (or "UDC"). The request seeks assistance with updating, modernizing, and codifying the UDC. The current UDC was adopted in 2010, and revised after the recent 160D changes approved by the North Carolina General Assembly in 2019. The City now seeks a comprehensive revision to implement the new adopted policy guidance, ensure consistency with Plan land use and character areas, provide for a wider array of housing options, and establish new standards for redevelopment and compatible infill.

The City's request identifies several areas of project emphasis, including:

- Preparing a logical format and structure for the new UDC;
- Providing recommendations for correcting weaknesses in the existing regulations;
- Ensuring consistency between the new UDC text and other City regulations and policy;
- Reviewing and revising UDC text for greater readability, consistency of voice, and ease of use;
- Exploring issues of equity regarding how standards may impact different groups disproportionately;
- Conducting an analysis of the ways in which the UDC promotes or undermines the provision of diverse housing types;
- Incorporating incentives, flexibility, and a path of least resistance for preferred forms of development; and
- Preparing the new UDC in ways that are modern, graphically driven, and consistent with national best practice.

This document is the CodeWright team's response to the City's Request for Qualifications. Code drafting is our core practice and medium-sized cities experiencing rapid growth pressure are our ideal clients. We applaud Statesville for using placemaking efforts to raise the bar for development quality as a basis for attracting new investment. We agree that emphasis on compact development patterns and reinvestment in established areas are key to unlocking a greater return on the investments already made by the City. Success with raising the bar for development quality and promoting redevelopment requires a code that balances flexibility with predictability, provides incentives for preferred forms of development, and relies on codified standards for more predictable staff decision-making.



We have the capacity to assist Statesville with this important project. We have six open code projects, three of which will be complete before December 2024. We are joined by a team of affordable housing experts who can help ensure the new UDC is equitable and supports attainable housing. We are devoted to building long-term client relationships through effective code documents that function as intended and exceed expectations.

PART B * CODEWRIGHT APPROACH

WHAT DOES CODEWRIGHT DO DIFFERENTLY?

We relentlessly pursue innovation.

Our current code is better than our last one and we are driven by the desire to make the next code our best code.

We think about how a code will be provided before we start drafting.

Each code is unique and we explore options for appearance, maintenance, and update before we start.

We prepare detailed annotated outlines of new codes to create more opportunities for discussion and exploration before drafting starts.

We use incentives and flexibility to create win/win outcomes for applicants and clients.

We use a uniform procedural structure to ensure predictability for applications.

We track legislation to find new ways to maintain legal sufficiency.

We provide pro bono work and continuing services.

We stick around after adoption to learn what worked and to help fix what did not work.

HOW DO WE APPROACH PUBLIC ENGAGEMENT?

Approach to engagement.

Code projects are technical and require an approach targeted to the type of audience. We are firm believers in multiple iterations of review and discussion of deliverables throughout the process.

Audiences and methods of engagement.

Differing audiences require different engagement methods. Examples include:

- **The public** - Public forums, webpages, zoning map workshops, short videos, and office hours.
- **Staff** – Document review and discussion, status updates, and the Basecamp platform for internal project management.
- **Elected and appointed officials** – Assessments, presentations, and work sessions throughout the project.
- **Development community** – Testing, steering committee, and office hours.

Additional tools for engagement.

We create unique branding for each project. Branding is used throughout the project for meeting announcements, documents, and the website.

WE ARE A SMALL FIRM BY DESIGN – HERE'S WHY:

Value - We are stewards of finite resources:

- Project budget goes to drafting, graphics, and outreach, not management or administrative overhead.
- Project budget goes to paying for an expert, not training one.
- We focus on work product quality, not billable hours.
- Because we are small, we can focus on what it takes to get the work done instead of on contract amendments.

Specialists - Code drafting is our core practice:

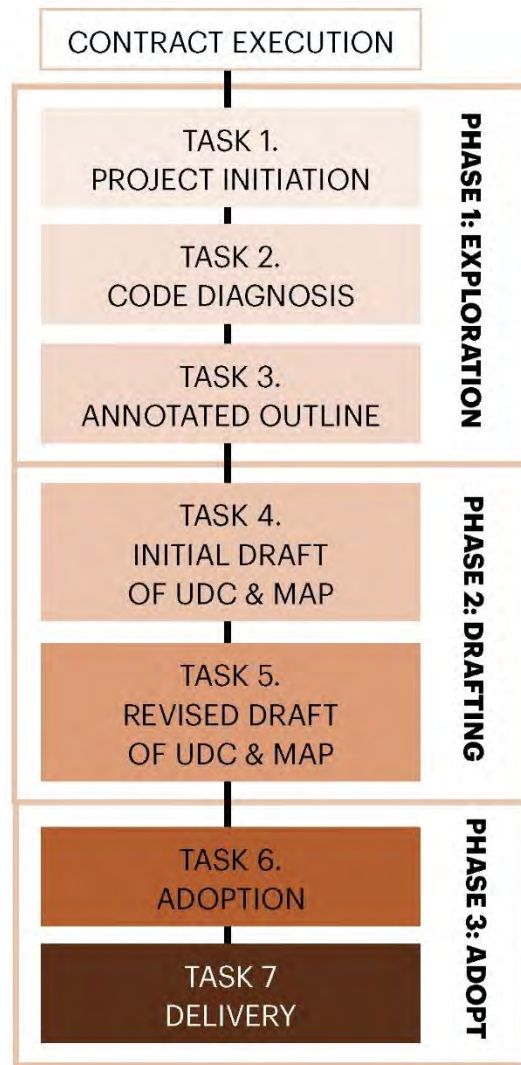
- We focus on regulations instead of other disciplines.
- We spend a lot of time thinking about how to write better codes.

Personal attention - More time with principals:

- Clients have direct access to seasoned professionals throughout the project.
- Regular access to experts means more time to discuss ideas and possibilities.

PART C * SCOPE OF SERVICES

Part C sets out our proposed scope of services. It is based on our experience with similar UDC update projects, but we view this as an initial draft that can be modified to meet the City's needs. The work program consists of the seven basic tasks (see the flow chart below) that result in one or more work products each.



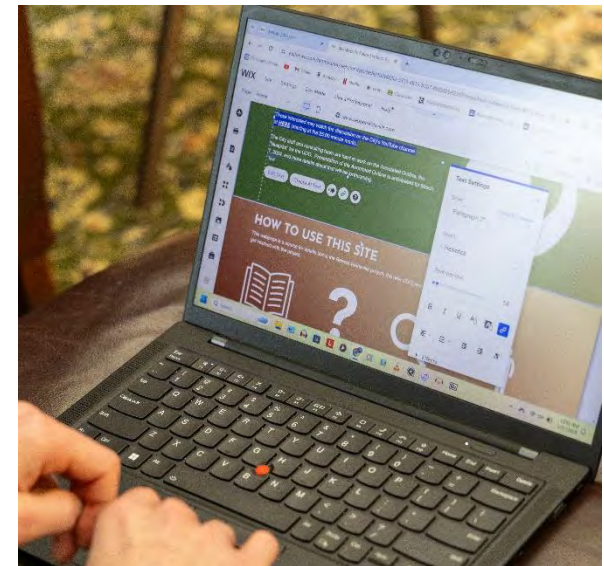
This scope anticipates that City staff will conduct review of draft work products, provide comments, and participate in meetings. City staff is also responsible for meeting coordination, scheduling, and securing venues. We are happy to have City staff take the lead on the preparation of certain sections, and can finalize those details during contract negotiation.

This scope of services is followed by a summary of the public engagement plan, a proposed schedule, and a project budget.

TASK 1. PROJECT INITIATION

Project Initiation includes the consulting team's thorough review of all policy guidance (like the 2045 Land Development Plan, and the 2019 Mobility + Development Plan), as well as the existing regulations. This scope of services contemplates this review during Task 1 instead of as a post-diagnosis task as contemplated in the City's RFQ.

After review of these documents, the consulting team will travel to Statesville for two days of meetings with the community. Activities during this trip include project introductions to City officials, discussion of project expectations, establishment of communication protocols, the initial meeting of the Steering Committee formed to oversee the project (which could also be the Planning Board), finalizing the public engagement plan (including plan for stakeholders), project schedule, creating project branding materials, an initial public forum to review land use and policy guidance, and stakeholder interviews. The task culminates with preparation and launch of a project webpage.



PART C * SCOPE OF SERVICES

TASK 2. CODE DIAGNOSIS

The Code Diagnosis is a “road map” for the new UDC. It is based on thorough reviews of adopted policy guidance and existing regulations as well as on the feedback collected during Task 1. It includes detailed summary tables of all current land use policy guidance and development regulations supplemented with details on how individual policy guidance could be implemented or how existing regulations might be revised.

The Code Diagnosis in Statesville will also assess how the UDC may be disproportionately impacting minority populations and recommend incentives and procedures to achieve greater equity in the administration of development rules. This analysis will include recommendations for how the UDC can better promote housing choice and housing attainability.

The Code Diagnosis organizes its recommendations for UDC improvement into a series of key themes for improvement such as how the document might be made user-friendly or how greater procedural efficiency can be achieved. This review will also outline any changes needed to comply with State law, federal law, and relevant case law. The task includes a two-day trip to Statesville after posting the document on the project webpage for consulting team members to discuss the report with the Steering Committee, the public, and the City Council. The consulting team will also host its first set of office hours where anyone can schedule a meeting with the consulting team to pose questions or learn about the project.

City staff’s role in Task 2 is to review the initial version of the Code Diagnosis and provide comments to the consulting team who will then revise the document prior to publication.

KEY THEMES FOR IMPROVEMENT - #2.
Implement the Town's Adopted Policy Guidance

The Town's Adopted Policy Guidance includes the adopted plans, policies, and policy statements that direct and inform day-to-day decisions on land use. The adopted policy guidance establishes and promotes the Town's vision for its future and how development, patterns and the 2045 Comprehensive Growth Parks and Recreation Plan. The Downtown Master Plan and the Downtown Master Plan are the primary documents that guide the Town's development decisions.

The table below provides a comprehensive summary of the important to note that the Plan will be made way contact address on the UDC draft with the guidance from the C

2045 COMPREHENSIVE POLICY STRATEGY DEVELOPMENT ACTION

Land Use and Housing

LU 1.1.2: Support varying development based on the Future Land Use

LU 1.1.3: Review and update UDC (and the 2006 General Guidelines)

LU 1.2.1: Encourage high-quality design in commercial and development

APPENDIX - REVIEW OF CURRENT UDC

The following table provides a detailed review of the Town of Clayton's current Unified Development Code (UDC) as effective 2.15.22. The table below summarizes each major section in the UDC and provides a recommendation (or indication for further discussion, if appropriate) for how the material could best be configured in the updated UDC. This information will be used to form the recommendations in the Diagnosis's Report and helps to clarify the structure in the Annotated Outline of the new UDC.

CLAYTON UNIFIED DEVELOPMENT CODE (effective 2.15.22)

§155.# / NAME	POTENTIAL DISPOSITION IN NEW UDC
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ARTICLE 1: GENERAL PROVISIONS

100 Title
Sets out the title of the UDC.
Change title to Unified Development Ordinance (UDO) and supplement with language identifying the Official Zoning Map

101 Authority & Identifies the statutory provisions allowing the Town to regulate land uses

102 Purpose
Repeats the basic purpose statements for zoning and land development and police power from the General Statutes

103 Effective Date
Identifies the effective date for the UDC.

104 Jurisdiction
Discusses the Official Zoning Map, the Future Land Use Map from the Comprehensive Plan, and other maps.

105 Legal Status

APPENDIX - STAKEHOLDER INPUT SUMMARY

Task 1, Initiation of the Codify Clayton project includes a series of 10 interviews with 20 different project stakeholders, including members of the development community, Town officials, and other interested parties. This summary report details the input collected during these interviews. The table below identifies the various interview dates and stakeholders who provided comments:

INTERVIEW DATE	STAKEHOLDER GROUP	PARTICIPANTS
4.27.22	Engineering Community	Donnie Adams - Adams & Hooge Richard Brown - Kinley Horn Austin Roland - Kinley Horn Spencer Meekins - McGill Assoc.
4.27.22	Archer Lodge	Mike Gordon - Manager Julie Maybae - Planning Director
5.3.22	Developer Representatives	Kent Alexander
5.3.22	Developer Representatives	Dave DeYoung - Hearth Points Haley Hogg - Hearth Points Emily Beddingfield - James Liscomb
5.5.22	Developer Representatives	Trey Adams - Ales Surf
5.5.22	Economic Development	Patrick Perce - Clayton Economic Development Jana Wooten - Clayton Chamber of Commerce Paul Auclair - Owner Deep River Brewing Co.
5.6.22	Town Officials	Andria Archer - Town Council Avery Everette - Town Council
5.12.22	Developer Representatives	*
5.23.22	Town Officials	Jason Thompson - Mayor Pro Tem Porter Casey - Town Council
6.23.22	Town Officials	Jordy McLeod - Mayor Michael Sims - Town Council

* No attendees. Twelve developer representatives were identified and contacted about attending one of the four interviews. A total of five developer representatives participated in the stakeholder interviews (a participation rate of 42%).

The next pages provide a summary of the input collected from the 20 stakeholders interviewed. Individual responses are held in confidence, but the following pages provide a summary of comments, organized by ten different topic areas.

UDC Diagnosis Report - June 2022
Page 58 of 67

PART C * SCOPE OF SERVICES

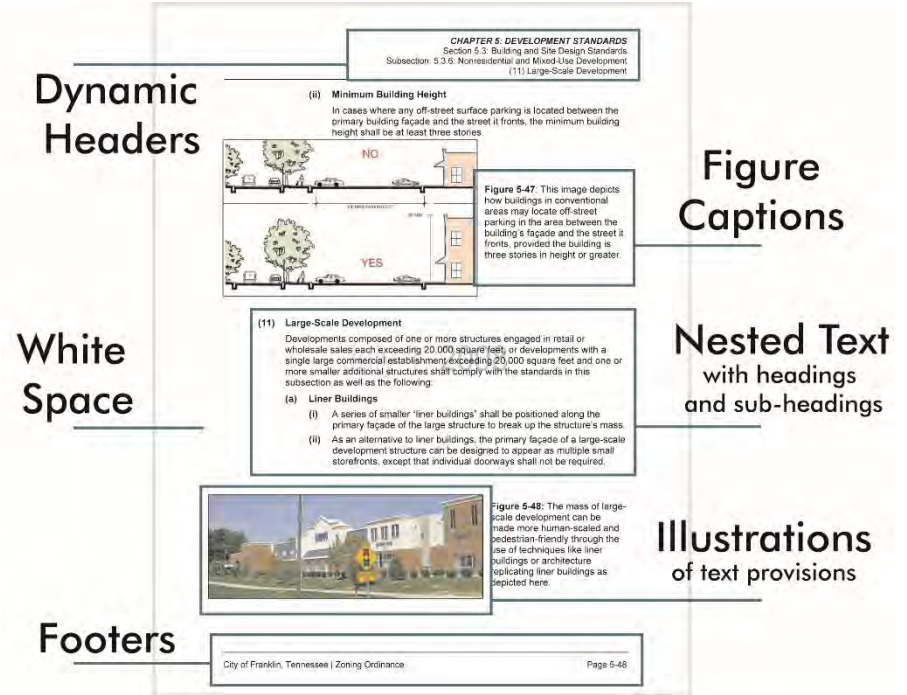
TASK 3. ANNOTATED OUTLINE

The Annotated Outline is a “dress rehearsal” for the new UDO. It includes the full document structure, organization, page layout, numbering scheme, and a detailed description of each major section of the document.

It includes footnotes clarifying how current sections are carried forward or revised as well as new sections added based on guidance in the Code Diagnosis (prepared in Task 2). The Annotated Outline will also include important summary tables such as the application procedures summary, the zoning district translation table, and the table of common principal uses (including a comparison to how the current UDC permits principal uses). It may also include a mockup of how the zoning district information will be organized, or how procedural text is configured.

Following an initial staff review and revision, the Annotated Outline will be revised, placed on the project webpage, and the consulting team will then travel to Statesville for three days of meetings with the Steering Committee, Planning Board, HPC, BOA, DDRC, any City-identified focus groups, the public, and the City Council.

City staff’s role in Task 3 is to review and comment on the draft Annotated Outline before it is posted. City staff will also need to coordinate a series of special meetings with City boards and commissions during the consulting team’s trip, which is timed to coincide with the City Council’s regular meeting on Day 3 of this trip.



The graphic above depicts the page layout from a modern development code. First and foremost, modern development codes are heavily reliant on graphics and illustrations to convey coding concepts. It is also important to provide captions that describe the imagery for readers. Document text is styled with varying typefaces, colors, and bolding schemes that help the reader better understand the relationships between text. Each page includes a series of navigational aids like dynamic page headers, and clear footers. The Annotated Outline is configured to demonstrate how all these pieces work together to make the new UDC easy to use and follow.

PART C * SCOPE OF SERVICES

TASK 4. DRAFT UDC & MAP

Task 4 includes the preparation and review of the initial draft of the new Unified Development Code and a draft version of the Zoning Map. The staff review version of the initial draft will be prepared in three modules, or groups of related chapters, each forwarded to staff when complete. Following discussion and revision, the initial draft version of the UDC in its entirety will be forwarded to the Steering Committee for its review, then the consulting team will travel to Statesville for two days of meetings. CodeWright will also prepare an initial draft version of the Zoning Map based on the input and discussion in Tasks 1 through 3. During the trip, the team will overview the UDC text and the zoning map during a public forum in addition to meeting with the Steering Committee and the City Council.

TASK 5. REVISED UDC & MAP

Task 5 includes the revisions to the initial draft versions of the UDC and Zoning Map based on the comments collected in Task 4. The consulting team will overview comments collected during Task 4 with City staff prior to preparing the revised draft versions. This helps minimize the need for two rounds of revision of materials in Task 5. CodeWright will consolidate the three modules of text into a single volume. Changes in the text will be tracked so that reviewers will see what portions of the document were revised. The consulting team will also prepare a revised version of the Zoning Map based on input collected. Following a few weeks for review, the consulting team will travel to Statesville to overview the UDC text and map with the Steering Committee, the Planning Board, and the public (a meeting with the City Council or other groups may also be arranged, at the City's discretion)

Chapter 6 Standards

Section 6.6 Landscaping and Screening
Sub-section 6.6.12 Perimeter Buffers

TABLE 6.6.12.D: PERIMETER BUFFER CONFIGURATION

TYPE D - OPAQUE

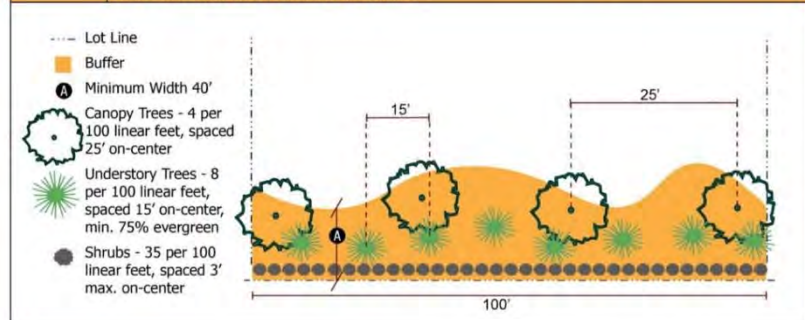
The Type D Opaque perimeter buffer functions as a fully opaque screen from the ground to a height of eight feet. This type of buffer provides a strong sense of visual and acoustic separation between uses. The cross-section image below shows an approximation of this buffer type at maturity.



BUFFER CONFIGURATION	REQUIREMENT
Buffer width (feet) [1]	40
Canopy trees per every 100 linear feet (#) / Max. on-center spacing (feet)	4 / 25
Understory trees per every 100 linear feet (#) / Max. on-center spacing (feet)	8 / 15
Minimum percentage of evergreen understory trees (% of total along 1 side)	75
Shrubs per every 100 linear feet (#) / Max. on-center spacing (feet) [2]	35 / 3
Minimum percentage of evergreen shrubs (% of total along 1 side)	85

NOTES:

- [1] Provision of a semi-opaque fence or wall along the entire buffer span allows the buffer width to be reduced by 5 feet (chain-link fencing is not permitted). Provision of a fully-opaque fence, wall, or berm along the entire buffer span allows the buffer width to be reduced by 10 feet.
- [2] In the event a fence or wall is provided, it shall be located within 10 feet of the lot line. Shrubs, if required, shall be located between the fence or wall and the lot line, but no closer than three feet to the lot line.



530

Town of Clayton Last Update
Unified Development Ordinance 11-20-23

PART C * SCOPE OF SERVICES

TASK 6. ADOPTION

As a part of Task 6, CodeWright will revise the draft UDC and Zoning Map to address remaining comments, insert any remaining illustrations, prepare appendices, and ensure the document text and Zoning Map is in adoption-ready form. The adoption process involves two hearings – one with the Planning Board (conducted as a public meeting, not a public hearing) and one with the City Council. Consulting team members will make two one-day trips to Statesville for these meetings. This scope of work anticipates the need for a third meeting or hearing, which has been included in the proposed budget.

TASK 7. DELIVERY

Following adoption, CodeWright will deliver a digital version of the adopted UDC prepared in Microsoft Word 10, MS Office 365, or other current version. CodeWright will deliver a .pdf format version suitable for placing on the City's webpage. Digital versions of all graphics and illustrations in the UDC are provided in .jpeg and native (Photoshop, Illustrator, Sketchup) formats. CodeWright will also deliver a package of digital ArcGIS shapefiles for the adopted Zoning Map. This scope of services includes an on-site training session with City staff regarding maintenance and revision of the ordinance text.



While not included in the scope of services, CodeWright provides 40 hours of post-adoption pro bono follow-up service to our clients. The manner and timing of the service is at the City's discretion. Some communities use it for additional research and drafting. Others use it for training purposes. Some communities bank the time and then utilize it at a later date for assistance with subsequent amendments or codification. We are proud to provide this service as a demonstration of our commitment to long-term client relationships and our pursuit of innovation in code drafting services.

PART D * ENGAGEMENT

The following is a summary of the six primary elements of the proposed public engagement plan for the Statesville UDC project. Public engagement is targeted to technical experts and interested parties during the early stages and broadens to the general public after initial draft materials are ready for consideration. As with the proposed scope of work, we view this as a draft and are happy to discuss the ways in which the engagement plan could be modified to better suit the City's needs.

1. PROJECT WEBPAGE

The CodeWright team develops a project webpage for use throughout the project as the primary source for project-related information and draft work products.

- Developed in Task 1
- Uses a unique project name/logo developed with the City
- The page includes draft documents, FAQ, contact details, upcoming events, project status reports
- Site visitors may leave a comment or ask a questions on the site
- The site is maintained by the consulting team throughout the project and then given to the City



2. STAKEHOLDER MEETINGS

Stakeholder meetings and interviews are an efficient way to identify issues of community concern.



- Interviews are usually conducted in Task 1
- A developers focus group may also be formed, at the City's discretion
- Stakeholders are City-identified
- The work program anticipates 8-10 one-on-one interviews without City staff present
- There are usually one or two stakeholders in each interview
- Interviews are conducted in-person or by video conference
- Work products include a summary report of stakeholder comments by topic

3. STEERING COMMITTEE

Code projects often rely on a steering committee (task force) to help review and revise draft work products.

- The Committee is formed in Task 1 and meets during Tasks 1 through 5
- The Committee is usually comprised of technical experts or constituency representatives (but can also be the Planning Board)
- The Committee provides initial reactions to work products but does not vote
- Work product reviews are conceptual, not line-by-line
- There are 6 meetings anticipated



PART D * ENGAGEMENT

4. PUBLIC FORUMS

Public forums are organized as a blend of formal presentation and open house format gatherings. They are conducted at key project milestones. Map-related forums are organized as workshops where people may review maps and pose questions at different stations around the room.

- There are approximately 5 public forums anticipated
- Forum 1 – Project Introduction
- Forum 2 – Code Diagnosis
- Forum 3 – Annotated Outline
- Forum 4 – Review of Initial Draft Text and Map (all-day drop-in forum)
- Forum 5– Review of Revised Draft Text and Map (all-day drop-in forum)



5. MEETINGS AND HEARINGS

Meeting and hearings are the formal presentations and discussions conducted with City officials. At least one meeting or hearing is conducted during each of the consulting teams' trips to Statesville.

Each meeting includes a PowerPoint or other presentation as well as a written meeting summary that documents the direction provided. The following is the list of anticipated meetings or hearings.

- Council Meeting, Task 1, Project Initiation
- Council Meeting, Task 2, Code Diagnosis (this is often conducted as a joint meeting with the Planning Board)
- Council Meeting, Task 3, Annotated Outline
- Council Meeting, Task 4 Initial UDC Draft
- Planning Board Meeting, Task 5 Revised UDC Draft
- Planning Board, Task 6 Adoption (conducted as a public meeting, not a public hearing)
- Council Meeting, Task 6 Adoption (conducted as a public hearing)
- This scope of work includes an additional meeting with City Council at no extra charge, if needed

All meetings are advertised by City staff.

6. OFFICE HOURS

The CodeWright team anticipates at least 4 multi-day trips to Statesville during Tasks 2 through 5. During each trip, the team sets-aside at least one half-day to conduct up to four "office hours" meetings. These are meetings or presentations that are requested by individual City residents or other organizations for the purpose of discussing the project or asking questions. Meeting are conducted by the consulting team with or without staff present while the consulting team is in Statesville.

City staff is responsible for scheduling office hours during the blocks of time allocated for these meetings, as well as for providing the necessary meeting space.



PART E * SCHEDULE

This portion of the response outlines a proposed **24-month project schedule** based on the Scope of Work in Part C. We view this proposal as a starting point for discussion and are willing to make modifications to better suit the City's needs. This schedule contemplates contract execution in early June of 2024 and completion of the project in late June of 2026.

TASK #	DESCRIPTION	START (mo/yr)	FINISH (mo/yr)	DURATION (months)
1	Project Initiation <ul style="list-style-type: none"> • Kickoff meeting • Webpage launch • Stakeholder interviews 			2
	<ul style="list-style-type: none"> • Steering Committee meeting 1 • Public Forum 1 • City Council Meeting 1 	6/24	7/24	
2	Code Diagnosis <ul style="list-style-type: none"> • Initial draft • Staff review & revision 			3
	<ul style="list-style-type: none"> • Steering Committee meeting 2 • Public Forum 2 • City Council meeting 2 	7/24	9/24	
3	Annotated Outline <ul style="list-style-type: none"> • Initial draft • Staff review & revision 			3
	<ul style="list-style-type: none"> • Steering Committee meeting 3 • Public Forum 3 • City Council meeting 3 	10/24	1/25	
4	Initial UDC Draft Text & Map <ul style="list-style-type: none"> • Initial draft • Staff review & revision • Revised draft 			9
	<ul style="list-style-type: none"> • Steering Committee meetings 4,5 • Public Forum 4 • City Council meeting 4 	2/25	10/25	
5	Revised UDC Draft Text & Map <ul style="list-style-type: none"> • Revised draft • All illustrations 			4
	<ul style="list-style-type: none"> • Steering Committee meeting 6 • Public forum 5 • Planning Board meeting 1 	11/25	2/26	
6	Adoption <ul style="list-style-type: none"> • Adoption versions 			3
	<ul style="list-style-type: none"> • Planning Board meeting 2 • City Council Hearing 	3/26	5/26	
7	Delivery <ul style="list-style-type: none"> • File consolidation 			1
	<ul style="list-style-type: none"> • Document training 	6/26	6/26	
				24

PART F * BUDGET

TASK	BUDGET
Task 1 Project Initiation	\$12,500
Task 2 Code Diagnosis	\$22,500
Task 3 Annotated Outline	\$25,000
Task 4 Initial UDC Draft Text and Map	\$65,500
Task 5 Revised UDC Draft Text and Map	\$38,500
Task 6 Adoption	\$6,000
Task 7 Delivery	\$5,500
Graphics	\$8,000
Web Page	\$4,000
TOTAL	\$187,500

This portion of the response outlines a proposed not-to-exceed project budget of **\$187,500** based on the proposed Scope of Work. We view this budget as a starting point for discussion and are willing to make modifications to better suit the City's needs. Each task includes an individual task balance, and there are some aspects of the project that are billed as a flat fee. CodeWright does not charge for travel and tasks are only billed following completion. The 40 hours of post-adoption pro bono service from CodeWright is not billed. We encourage the City to consider retaining a small contingency budget in case additional meetings become necessary. Hourly rates by team member are included in the table below.

TEAM MEMBER	HOURLY RATE
Chad Meadows, Project Manager, Lead drafter	\$200
Courtney Tanner, Code Drafter	\$150
Angie Manning, Drafting Assistant,	\$125
Andrew Ausel, Engagement, Formatting	\$100
Eric Orozco, Housing and Equity Analysis	\$234
Daniel McNamee Housing Analysis	\$183
Kim Whaley, Mapping	\$85

PART G * FIRM PROFILE

ABOUT

CODEWRIGHT PLANNERS, LLC

Year Founded: 2014

Type of Business: LLC

Headquarters: 9 Blue Bottle Lane, Durham, North Carolina 27705

Webpage: www.codewrightplanners.com

CodeWright provides a full suite of planning services, with code drafting at the core of our practice. **We guide our clients through a comprehensive process developed as a result of our deep experience – from branding and public engagement, through an iterative drafting process, all the way to final adoption and long-term maintenance.** We believe in building strong relationships with our clients to help them achieve their community's goals.

We are experts in:

- Creating incentives for preferred development
- Balancing predictability and flexibility
- Reliance on measurable review criteria
- Procedural clarity
- North Carolina planning law
- Tree protection, design controls, and sign regulations
- Graphics/Code formatting/Microsoft Word

CodeWright does not have any conflicts of interest, claims, investigations, litigation, regulatory proceedings, nor disciplinary actions.

Contact:

Chad Meadows, AICP, Principal & Founder

919.593.2868

chad@codewrightplanners.com



Celebrating 10 years of providing planning services to local governments throughout the Southeast

PART H * TEAM ORGANIZATION



The table below shows the estimated number of hours on the Statesville UDC project by professional. Hours are approximate, and may be revised over the course of the project.

Professional	% of UDC Project Time	Estimated # of Hours on Project
Chad Meadows	31%	380
Courtney Tanner	17%	200
Angie Manning	23%	275
Andrew Ausel	19%	225
Eric Orozco	4%	50
Daniel McNamee	4%	45
Kim Whaley	3%	36
	100%	1,211



**CHAD MEADOWS, AICP
PROJECT MANAGER**

Day-to-day Contact,
Drafting Lead, Illustrations



COURTNEY TANNER, AICP

Assistance on Code Diagnosis
& Annotated Outline, UDC
Peer Review



ANGIE MANNING, AICP

UDC Drafting
Assistance



ANDREW AUSEL, CZO

Public Engagement,
UDC Formatting



neighboring
concepts



**ERIC OROZCO, AICP,
LEED AP ND**

Neighboring Concepts
Housing & Equity



DANIEL MCNAMEE, AIA, LEED AP BD+C

Neighboring Concepts
Housing & Equity Analysis



KIMBERLY WHALEY
TideWater Associates
Mapping

PART I * QUALIFICATIONS



CHAD MEADOWS, AICP
Principal and Founder of CodeWright Planners

Years of Experience: 32

Education:

- Master of Urban and Regional Planning
Portland State University, Portland, OR
- Bachelor of Arts, Geography
University of North Carolina, Greensboro, NC

Affiliations:

- Chair, Legislative Committee, APA-NC
- Chair, Board of Adjustment, Durham City/County
- Past Chair, Raleigh Appearance Commission

Chad has spent the last twenty years drafting and illustrating award-winning land use regulations, creating growth management plans, and providing planning support for a variety of municipalities across the United States. He takes a pragmatic and comprehensive approach to solving planning issues and has conducted complex projects as a public sector planner and as a private consultant. An expert in development regulations, Chad is passionate about producing the highest quality codes and plans for his clients and is driven by a desire to continuously improve, learn, and share his knowledge.

As a public sector planner, Chad worked in the Portland Bureau of Planning, served as Senior Comprehensive Planner in the Florida Keys, and oversaw the Land Development Ordinance Update in Cary, North Carolina. His breadth of experience includes working on growth management and adequate public facilities issues, long range planning, and entitlements.

Prior to founding CodeWright, he spent a decade drafting and illustrating codes for a national land use consulting firm, and co-authored *The Rules that Shape Urban Form*. Chad founded CodeWright Planners in 2014 to focus on providing code drafting services to towns, cities, and counties throughout the Southeast.

Bold=CodeWright clients

SELECTED PROJECT EXPERIENCE

Complete Development Codes

Archer Lodge, NC	High Point, NC
Atlantic Beach, NC	Henderson, NV
Burlington, NC	Jackson, NC
Camden County, NC	Jacksonville, NC
Cary, NC	Laurel Park, NC
Cashiers, NC	Leggett, NC
Clayton, NC	Morehead City, NC
Currituck Co., NC	Mooresville, NC
Dallas, NC	Moore County, NC
Edgecombe Co., NC	New Bern, NC
Falls Church, VA	Portsmouth, VA
Fayetteville, NC	Pulaski County, IN
Folly Beach, SC	Red Oak, NC
Franklin, TN	Reidsville, NC
Franklinton, NC	Rock Hill, SC
Fredericksburg, VA	Stantonsburg, NC
Gates County, NC	Weldon, NC
	Zebulon, NC

Special Projects

- Atlantic Beach, NC – CAMA Plan**
- Conway, NC – Code Assessment**
- Cumberland County, NC – Sign Code**
- Edenton/Chowan Co., NC – Joint CAMA Plan**
- Franklin County, VA – Code Assessment
- Greenville, SC – Design Standards
- Hendersonville, NC – Subdivision Ordinance**
- Henrico County, VA – Code Assessment
- Morehead City, NC – Targeted code revisions**
- Morrisville, NC – Targeted code revisions**
- Raleigh, NC – PDD Application Materials**
- Stafford County, VA – Code Assessment
- Stantonsburg, NC – Town Code**
- Talbot County, MD – Working Waterfront**
- Vienna, VA – Maple Avenue District
- Winston-Salem/Forsythe County, NC – UDO Assessment & Reformat**

PART I * QUALIFICATIONS



COURTNEY TANNER, AICP, CZO
Code Drafter

Years of Experience: 21

Education:

- Master of Urban and Regional Planning
- Bachelor of Science
Virginia Commonwealth University, Richmond, VA

Affiliations:

- UNC School of Government Civic Fellow
- Awards Committee, APA-NC

Courtney brings a public sector lens to the code writing and adoption process. She has managed or overseen ordinance rewrites, design standards, and land use plans. Courtney understands the importance of having an ordinance that is clearly written, well-illustrated, easy to implement, and legally defensible, and views these principles as instrumental in solving development issues.

Courtney has worked at the senior management level for nearly half of her twenty-one years in the public planning sector. Her work often involves negotiating solutions to politically sensitive projects with numerous stakeholders. She has extensive experience interpreting ordinances, implementing comprehensive plans, and reviewing a variety of development application types.

An AICP-certified planner and a North Carolina Certified Zoning Official, Courtney is also a UNC School of Government Civic Fellow and a graduate of UNC’s Municipal and County Administration course. She is a frequent speaker at national and state conferences and has volunteered as a member of the APA-NC Awards Committee since 2014.

SELECTED PROJECT EXPERIENCE

Code Projects

- Town of Morrisville, NC*
 - Commercial Architectural Design Standards
 - Town Center Code
 - Town-wide Rezoning
 - Tree Preservation Ordinance
 - Unified Development Ordinance

New Bern, NC
Reidsville, NC

Bold=CodeWright clients

Planning Projects

- Town of Morrisville, NC*
 - Affordable Housing Plan
 - Comprehensive Transportation Plan
 - ETJ Expansion
 - Land Use Plan
 - Public Transportation Study
- Town of Wake Forest, NC*
 - Community Plan
 - Comprehensive Transportation Plan
 - Downtown Plan (ongoing)
 - Historic Preservation Plan
 - Housing Affordability Plan
 - Northeast Community Plan
 - Public Transit Plan

**Morrisville and Wake Forest projects completed while employed in the public sector.*



ANGIE MANNING, AICP
Code Drafter

Years of Experience: 26

Education:

- Bachelor of Arts
Meredith College, Raleigh, NC
- Major: Political Science
- Minors: Business and Communications

Angie has more than 26 years of experience in municipal and county planning, and a decade of experience in the construction industry. Angie’s communication and active listening style leads to positive outcomes for clients and stakeholders. Her experience in the public and private sectors has given her the ability to relate to both local officials and the development community in a meaningful way.

While in public service, Angie led the implementation of county-wide zoning in Onslow County, North Carolina. She also led the implementation of Onslow County’s first Joint Land Use Study (JLUS) with Marine Corps Base Camp Lejeune, Onslow County, and the local municipalities. After Hurricane Florence in 2018, Angie established post-storm procedures for permitting, flood plain management, substantial damage reporting for FEMA and administering the Hazard Mitigation Grant Program (HMGP).

Angie also has construction business experience, and managed the residential division including permits, sales, and closings.

SELECTED PROJECT EXPERIENCE

Code Projects

- Clayton, NC**
- Jackson, NC**
- Leggett, NC**
- Morehead City, NC**
- Stantonsburg, NC**
- Weldon, NC**

Planning Projects

- Archer Lodge, NC**
- Leggett, NC**
- Stantonsburg, NC**

Bold=CodeWright clients

Special Projects

- Joint Land Use Study (JLUS), Camp Lejeune and Onslow County, NC
- Flood plain management, Onslow County, NC
- Implementation of county-wide zoning, Onslow County, NC
- Post-storm permitting procedures, Onslow County, NC

**Onslow County projects completed while employed in the public sector.*

PART I * QUALIFICATIONS



ANDREW AUSEL, CZO
Drafting Assistant

Years of Experience: 5

Education:

- Master of Urban and Regional Planning Virginia Tech, Alexandria, VA
- Bachelor of Arts, Political Science Messiah College, Mechanicsburg, PA

Andrew has over five years of experience in planning, specifically in the areas of ordinance drafting, environmental planning, public engagement, and stakeholder facilitation.

His public sector work focused on drafting the environmental articles of the City of Charlotte’s Unified Development Ordinance, including tree preservation, stormwater, floodplains, and soil erosion and sedimentation. In addition, Andrew managed rezoning mapping applications for over 1,800 parcels to Transit-Oriented Development (TOD) zoning districts.

Prior his planning career, Andrew was the Associate Director of Legislative and Public Affairs at the Design-Build Institute of America in Washington, DC, where he worked to advance the educational mission of the association in the state legislatures and in the private sector.

SELECTED PROJECT EXPERIENCE

Code Projects

Clayton, NC
Charlotte, NC
Dallas, NC

Planning Projects

Archer Lodge, NC
Red Oak, NC

Bold=CodeWright clients

Special Projects

City of Charlotte, NC
Tree Canopy Action Plan
UDO Lead on Stormwater, Floodplains, Soil Erosion and Sedimentation, and Tree Protection Corridors of Opportunity Lead for Environmental and Sustainability Project Planning
Public engagement for UDO and Rezoning

**Charlotte projects completed while employed in the public sector.*



KIMBERLY WHALEY
Tidewater Associates

CADD Operator, Mapping Specialist

Years of Experience: 28

Education:

- Associate in Architectural Drafting, Coastal Carolina Community College

Kimberly Whaley is an expert CADD operator and is the CADD Drafting Supervisor at Tidewater Associates. She is responsible for mapping, technical drawing, and managing CADD Department personnel.

Kim has over 28 years of experience in civil drafting, technical drawings, graphics production, and micro computer applications utilizing Advanced Computer Aided Drafting and Design software.

In addition to creating land use maps and zoning maps, Kim’s graphic experience includes production of Street and Utility Construction Plans, Boundary and Topographic Survey Maps, and Engineering Plans for institutional, municipal, commercial, and residential developments.

SELECTED PROJECT EXPERIENCE

Land Use and Zoning Mapping Projects

Archer Lodge, NC Plan Update
Leggett, NC Land Use Plan
Mills River, NC Zoning Map
Morehead City, NC Zoning Map
New Bern, NC Zoning Map
Stantonsburg, NC Land Use Plan

Bold=CodeWright clients

PART I * QUALIFICATIONS



ERIC OROZCO, AICP, LEED AP
Urban Planning & Engagement
Neighboring Concepts

Years of Experience: 30

Education:

- Master of Architecture
Massachusetts Institute of Technology
- Bachelor of Science, Arts and Design,
Minor in Mechanical Engineering
Massachusetts Institute of Technology

Eric is an urban designer with a multi-disciplinary background including architecture and equitable development. He has participated in collaborative projects for affordable housing development, community regeneration, and mass transit. A special focus of Eric's work is addressing the historical inequities of urban planning practices.

Eric has contributed notable efforts to make thriving places that create economic opportunity for communities. He enjoys working with communities to organize neighborhood opportunity and housing initiatives. Such recent work includes helping to found the West Side Community Land Trust, Charlotte's first non-profit creating permanently affordable housing.

In addition, Eric's planning and design experience encompasses many of North Carolina's rapid transit and high-profile development projects. He is a LEED Accredited Professional in Neighborhood Development and has managed several green development projects.

SELECTED PROJECT EXPERIENCE

Community Projects and Major Planning Studies

- Smithville Community Infill Development Plan, Cornelius, NC
- Historic West End Partners Oaklawn Forward, Charlotte, NC
- Renaissance LEED Neighborhood Development, Charlotte Housing Authority
- Boulevard Homes HOPE VI, Charlotte, NC
- 5 Point Better Block, Charlotte, NC
- NC 147 Durham Freeway Reconnection Communities Study, Durham, NC
- "Shaping Our Future" Equitable TOD Planning, Chapel Hill, NC
- SouthPark Comprehensive Neighborhood Improvement Program, Charlotte, NC
- Charlotte Center City 2040 Vision Plan, Charlotte, NC
- Charlotte Future 2040 Comprehensive Plan, Charlotte, NC



DANIEL MCNAMEE, AICP, LEED
Principal-in-Charge
Neighboring Concepts

Years of Experience: 20

Education:

- Bachelor of Architecture
Virginia Polytechnic Institute and
State University

Daniel is a passionate leader at Neighboring Concepts and serves as one of four partners. He spearheads the development of authentic and sustainable communities through educational, recreational, and residential design. As the firm's leader for housing projects, he ensures that the firm meets its mission of design excellence and sustainability.

Daniel has designed award winning neighborhood and mixed-use developments, Daniel is a licensed architect and a LEED Accredited Professional in Neighborhood Development.

SELECTED PROJECT EXPERIENCE

Residential Housing and Development

- The Residences at Renaissance, Certified LEED Neighborhood, Charlotte, NC
- Mosaic Village Mixed-Use Development, Charlotte, NC
- 300/500 E. Main Development, Durham, NC
- 757 North Apartments, Winston-Salem, NC
- The Oaks at Cherry Redevelopment, Charlotte, NC
- Centra Square Redevelopment, Charlotte, NC

Master Planning and Community

- Charlotte Knowledge Community Master Plan, Charlotte, NC
- Mecklenburg County Parks & Recreation Master Plan, Charlotte, NC
- GTCC NW Campus Master Plan, HACA, Greensboro, NC
- Deaverview Redevelopment Master Plan, HACA, Asheville, NC
- Discovery Place Community Engagement, Charlotte, NC
- Harvey B. Gantt Center for African American Arts & Culture, Charlotte, NC
- The Renaissance Plan – HOPE VI, Charlotte, NC

PART J * PROJECT EXPERIENCE

CLAYTON, NORTH CAROLINA

Unified Development Ordinance

With pending completion of the final leg of Raleigh's Outer Loop (I-540), Clayton has become the fastest growing city in Johnston County (the fastest growing county in NC). Clayton has rapidly changed from a sleepy town of 7,000 in 2000 to a regional city of over 30,000 by 2023. In March 2022, Clayton hired CodeWright Planners to transform its development code into a modern, comprehensive unified development ordinance. The Town's goals for the Codify Clayton UDO project included:

- Implementation of its 2045 Comprehensive Growth Plan;
- More precise language and illustrations;
- A wider range of housing options; and
- Raising the bar for development quality.

The new UDO includes standards for 22 different zoning districts, 31 application procedures, 81 summary tables, and 287 illustrations. Public engagement on the project included a project web page, project brochure, 3 public forums, meetings with a development community focus group, 11 steering committee meetings over the course of the 21-month project. The new UDO was adopted in November 2023.

Clayton has engaged CodeWright in a continuing services contract to assist the town with perfecting its new UDO.



Learn more about the UDO and the Codify Clayton project at www.codifyclayton.com

Clayton Planning Department
Ben Howell, Director
Clayton Town Hall
111 East Second St.
919.553.5002
planning@townofclaytonnc.org



UDO features addressing Land Use & Housing goals

- Allow more mixed use development
- Add aesthetic and design standards for most uses
- Increase the range of housing types



UDO features addressing Downtown goals

- Make it easier and less expensive to develop in downtown
- Encourage redevelopment with infill incentives
- Foster live/work and upper story residential



UDO features addressing Transportation goals

- Provide more pedestrian infrastructure
- Add more bike lanes and facilities
- Establish street connectivity requirements
- Add new access management and driveway rules



UDO features addressing Economic Growth goals

- More predictable application procedures
- Foster mixed-use employment centers
- Add incentives for employment generating uses



UDO features addressing Parks & Natural Resources goals

- Increase open space requirements
- Add sustainable development incentives
- Increase tree protection rules
- Add a conservation subdivision option



UDO features addressing Public Services goals

- Enhance stormwater requirements
- Identify areas where public water & sewer will not be extended
- Increase densities in areas already served by infrastructure

Chapter 6 Standards

a. MINIMUM CONNECTIVITY INDEX SCORE REQUIRED
All development subject to this Ordinance shall achieve an internal street connectivity score in accordance with the following table:

ZONING DISTRICT WHERE LOCATED [1]	MINIMUM REQUIRED INDEX SCORE
KJR, RLL, RLD	1.20
UD, HD, CZ1	1.25
RMD, RHD, CZR	1.30
NCM, PUB, CZC	1.40
DTN, MXD, CZM, CZD	1.50

NOTES:
[1] In cases where a single development is located within more than one zoning district, the connectivity index score shall be based on the zoning district with the highest minimum score requirements.

b. CONNECTIVITY INDEX SCORE CALCULATION
i. The connectivity index for a development is calculated by dividing its links by its nodes.
ii. Figure <> Street Connectivity Index Example provides an example of how to calculate the connectivity index. Nodes (dots) exist at street intersections and cul-de-sac heads within the development. Links (lines) are sections of road that connect nodes. Street stub-outs are considered as links, but are not counted as nodes. One link beyond every node that exists in the development and provides access to the street system outside the development shall be included in the index calculation.
iii. In the diagram, there are 37 links (circles) and 22 nodes (squares); therefore, the connectivity index is $1.68 (37/22 = 1.68)$.

FIGURE <> STREET CONNECTIVITY INDEX EXAMPLE



KEY PROJECT FEATURES

- A novel approach to alphabetical chapter and section naming
- Unique three-tiered approach to conditional rezoning
- Innovative tree retention requirements
- Context-based open space standards
- Comprehensive infrastructure provisions
- Incentives for preferred development forms
- Project was completed on-time and under budget



<https://www.townofclaytonnc.org/746/Unified-Development-Ordinance>

PART J * PROJECT EXPERIENCE

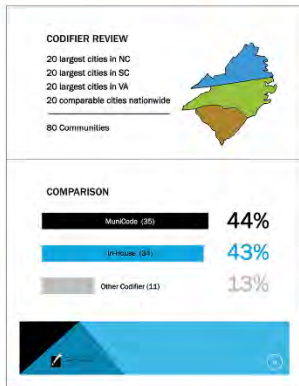
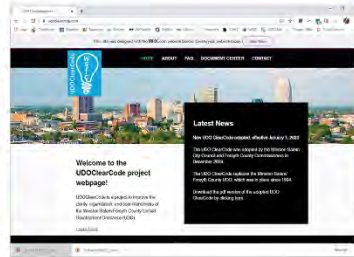
WINSTON-SALEM/FORSYTH COUNTY NORTH CAROLINA UDO Assessment & Reformat

Current UDO Chapter Structure

Chapter A – Definitions Ordinance
Article I. General
Article II. Definitions
Chapter B – Zoning Ordinance
Article I. Purpose and Authority
Article II. Zoning Districts, Official Zoning Maps & Uses
Article III. Other Development Standards
Article IV. Historic/Historic Overlay Districts
Article V. Miscellaneous Situations
Article VI. Administration and Amendments
Article VII. Site Plan Requirements
Article VIII. Fees
Article IX. Enforcement
Article X. Appeals/Complaints
Chapter C – Environmental Ordinance
Chapter D – Subdivision Regulations

Proposed Updated UDO Chapters

Chapter 1. General Provisions
Chapter 2. Provisions
Chapter 3. Zoning Districts
Chapter 4. Use Regulations
Chapter 5. Development Standards
Chapter 6. Subdivision Requirements
Chapter 7. Environmental Provisions
Chapter 8. Nonconformances
Chapter 9. Appeals & Enforcement
Chapter 10. Definitions & Measurement



Winston-Salem/Forsyth County is a community of 250,000 people in the Triad region of North Carolina. The community has a consolidated Planning and Development Services Department that serves both the City and the County. The community contracted with CodeWright to assess their 1,000-page UDO as part of a multi-pronged approach to updating the document, which has been amended over 300 times since its adoption in 1994.

The project, called UDO Clearcode, included a detailed code assessment report, a project web page, and substantial public outreach to the public, development community, and City/County staff. The assessment identified a wide range of substantive and non-substantive recommendations for improvement to the UDO. It also included a thorough review of the document's compliance with applicable State and federal planning law and court precedent. In addition, the project included a review of digital codification options for the community's consideration.

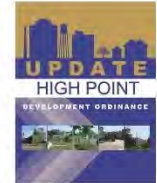
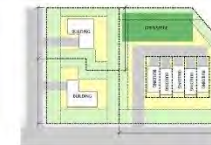
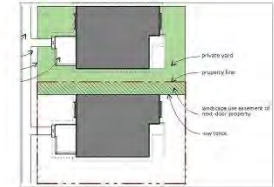
Following completion of the assessment report, the community extended its contract with CodeWright for the reformatting of the current UDO with a new intuitive structure, new style set and numbering system, and conversion of prose paragraphs into numbered statements and summary tables. The community adopted the reformatted version of the UDO in December of 2019, and will use this document as the basis for a series of staff-generated text amendments based upon the recommendations included in the code assessment report.

KEY PROJECT FEATURES

- Reformatting of current code language into a new document structure, layout, and numbering system
- Innovative means of distinguishing between text applicable to a land in one jurisdiction versus another
- Overview of digital codification options and best practices

<https://www.udoclearcode.org/>

HIGH POINT, NORTH CAROLINA Development Ordinance Update



- Regulations tailored to both Core City and suburban areas
- Incentives for preferred development types
- Consolidation of uses into major/minor categories
- Setbacks modified to enhance district distinctions
- Alternative equivalent compliance options
- Extensive development form controls

The City of High Point is a community of over 100,000 people in the Piedmont Triad region of North Carolina that hosts the international home furnishings market. The City recently adopted a plan for its Core City area and received a HUD Sustainable Communities Challenge Grant to update its development ordinance. CodeWright, in cooperation with Clarion Associates, was retained to assist the City in rewriting its current suburban-style zoning ordinance to implement the Core City Plan and integrate modern best practices into the code. Tasks include preparation of an assessment of the current development regulations, administration of a preference survey of city residents (particularly under-represented persons), testing of the updated ordinance provisions, training of City staff and officials in the new regulations, and maintenance of a comprehensive website that documented the project. The updated development ordinance incorporates modern graphic techniques, measurable development standards, and an extensive set of development form controls. The City adopted the updated Development Ordinance in May of 2016.

PART J * PROJECT EXPERIENCE

JACKSON COUNTY, NC Village of Cashiers Zoning District



RECODIFY CASHIERS
Community Character Analysis
9-25-23

PLACES OF CONSISTENCY

1. Bucks Coffee Cafe

- A Local Business
- B Gathering Area
- C Residential-Scale
- D Storefront Windows
- E Pitched Roof
- F Earth Tone Color

2. 107 South Corridor (Comucopia, Fiddleheads, Vivas, & Highland Hiker)

- A Residential Scale
- B Wooden Siding
- C 1-2 Story Height
- D Pitched Roof
- E Gathering Spaces
- F Informal Parking
- G Earth Tone Colors
- H Close to Street
- I Storefront Windows
- J Sequential Additions

RECODIFY CASHIERS
Community Character Analysis
9-25-23

PLACES OF INCONSISTENCY

4. Spin Stations (Highway 64 locations)

- A Canopy in Front
- B No Architectural Relationship between Canopy and Building
- C Scale of Canopy
- D Flat Roof
- E Limited Glazing (windows)
- F Service Areas not Screened

5. Designer Cottages (display on Highway 64)

- A Modern Architecture
- B Monopich Roof
- C Building Width
- D Scale
- E Foundation Obscured



The village of Cashiers is an unincorporated crossroads on a mountain plateau in Jackson County, 40 miles southwest of Asheville. A community of 700 permanent residents, it has been a vacation home and summer resort destination for over a century. In addition to seasonal residents, Cashiers attracts thousands of summer visitors each year. It receives over 87 inches of rainfall a year, making the area hydrologically dynamic and environmentally sensitive.

Growth pressures, traffic congestion, high land costs, and environmental protection issues led Jackson County to prepare a small area plan for Cashiers in 2019. This was followed by a community-sponsored ULI Advisory Services Panel Report which recommended managing growth and protecting the environment. In 2023, Jackson County hired CodeWright to assist with an overhaul of the Cashiers Commercial Area regulations.

The Recodify Cashiers project is a unique community character-based approach to zoning provisions. The project includes seven multi-day trips to Cashiers to discuss policy guidance, community goals, existing community character, and how modern development (like village-scale

mixed-use, boutique lodging, and workforce housing) can best be accommodated. Trips involved detailed discussions with community members and careful analysis of the current development template to establish a community character analysis report that documents Cashiers' community character in images and in written description.

The new Cashiers Commercial District will be a character-based zoning code that regulates building and site features based on consistency with community character. It also guides expansion of private transportation infrastructure in an environmentally-sensitive area.

KEY PROJECT FEATURES

- Environmentally-sensitive mountain resort destination
- Unincorporated village with its own zoning district
- Community character is codified in words and photos and used as review criteria
- Open space requirements for all use types

www.recodifycashiers.com

LAUREL PARK NORTH CAROLINA Unified Development Ordinance

FIGURE 6.1.10: ZONING PROCEDURE

STEP	ACTION
1	Pre-Application Conference See Section 6.2.6 (Pre-Application Conference)
2	Neighborhood Information Meeting Required for applications seeking more intense zoning districts See Section 6.2.5 (Neighborhood Information Meeting)
3	File Application See Section 6.2.6 (Application Filing and Acceptance)
4	Determination of Completeness See Section 6.2.6 (Determination of Application Completeness)
5	Staff Review See Section 6.2.6 (Staff Review and Action)
6	Planning Board Review and Recommendation
7	Public Hearing Scheduled
8	Public Notification See Section 6.2.6 (Public Notification)
9	Town Council Review and Decision
10	Written Notification of Decision See Section 6.2.12 (Written Notice of Decision)

FIGURE 7.4.6 (LANDSCAPE PLAN EXAMPLE)

CHAPTER 8: STANDARDS
SECTION 8.1.0 (LANDSCAPE AND SITEWORK)

8.1.1 PRIMARY ENTRANCES

- A. The primary entrance shall incorporate a landing, stoop, porch, walk, or screen located on the exterior of the building or an adjacent walkway or driveway.
- B. The primary entrance shall be clearly visible from the street.
- C. The primary entrance shall be clearly visible from the street.

8.1.2 SECONDARY ENTRANCES

- A. Secondary entrances shall be clearly visible from the street.
- B. Secondary entrances shall be clearly visible from the street.

8.1.3 WINDOW REQUIREMENTS

- A. Windows shall be clearly visible from the street.
- B. Windows shall be clearly visible from the street.

8.1.4 SCREENING REQUIREMENTS

- A. Screening shall be clearly visible from the street.
- B. Screening shall be clearly visible from the street.



Laurel Park is a highly desirable mountain community at the eastern end of the Blue Ridge Mountains 26 miles south of Asheville. The community has a long history of tourism and real estate speculation stretching back to the turn of the 20th Century, when real estate and resort developer platted much of the land that rests atop the two mountains that comprise much of the community. Continued growth and development have taken place in and around Laurel Park including significant improvements along Highway 64 through the heart of Town. Laurel Park contracted with CodeWright Planners to assist in the development of a new unified development ordinance aimed at protecting sensitive environmental resources as mountainside lots are developed and fostering high quality community design in the new town center district formed in response to the changes associated with Highway 64.

KEY PROJECT FEATURES

- Innovative stormwater and tree protection standards
- Design incentives for single-family development
- Comprehensive landscaping and screening standards
- Full 160D and 2021 Session Law compliance
- Reed-compliant signage standards

The project included an innovative set of stormwater and tree protection provisions, comprehensive design incentives for single-family residential development, a complete overhaul of the Town's subdivision provisions including new requirements for subdivision design and infrastructure development, new procedures to clarify and simplify the development application process, and full compliance with a wide variety of State and federal laws (including 160D, the Reed decision, NC Court of Appeals rulings on administrative flexibility, and even the suite of applicable 2021 Session Law).

The UDO was adopted in March of 2021 and became effective in August. Since adoption, the Town has entered into continuing services contract with CodeWright Planners, who have prepared a complete set of 19 new digital application forms for each procedure in the UDO as well as assistance with post-adoption codification of amendments in response to changing State legislation.

<http://tinyurl.com/LaurelParkUDO>

PART J * PROJECT EXPERIENCE

HENDERSONVILLE NORTH CAROLINA Subdivision Ordinance

ARTICLE 5.03. ENVIRONMENT
Section 5.03.01. Steep Slopes

SECTION 5.03.01.01. SLOPE SLOPES

A. PURPOSE
These standards establish minimum requirements for subdivision and development of lots that include steep slopes, ridges, and valleys that are visible from the public right-of-way or the public. More specifically, these standards are intended to:

1. Prevent or reduce the possibility of accelerated erosion on lots with significant slopes.
2. Reduce the risk of landslides or subsidence resulting from inappropriate construction techniques or development patterns in areas with steep slopes, and
3. Provide the owner, developer of projects and adjacent visible from the public right-of-way.

B. APPLICABILITY
The standards in this section shall apply to every subdivision, commercial subdivision, and major subdivision located on lots with an average slope of 15% or more.

C. STANDARDS

1. MINIMUM LOT AREA AND COVERAGE.
a. Regardless of the zoning district where located, lots located in areas subject to these standards shall maintain a minimum lot area and maximum lot coverage in accordance with Table 5.03.01.01, Steep Slope Standards.

AVG. SLOPE (PERCENT)	MINIMUM LOT AREA (SQ. FT.)	MAXIMUM LOT COVERAGE (PERCENT)
15.0%	1.2 Acre (52,903.36 SQ. FT.)	25
15.0% - 20.0%	1.5 Acre (65,343.36 SQ. FT.)	25
20.0% - 25.0%	2.0 Acre (87,120.36 SQ. FT.)	25

b. The maximum slope of a lot is provided in Figure 5.03.01.01, Steep Slope Standards.

Hendersonville Subdivision Ordinance 5-3 Effective: March 3, 2020

FIGURE 5.03.01.01. SLOPE EXAMPLES

- 45' accessway
- Exempt subdivision
- Bona fide farm
- Expedited subdivision
- Public street

Hendersonville is a diverse and historic community of 13,000 people in the North Carolina mountains 22 miles south of Asheville. Hendersonville contracted with CodeWright to assist the City with a complete revision of its subdivision ordinance. The City's prior subdivision ordinance was adopted in 1964 and amended in 1996. It lacked clear standards for infrastructure (streets, water, sewer, sidewalks, functional fire protection, etc.) and contained a substantial amount of obsolete and unclear language that required numerous interpretations. The City was also looking for additional flexibility mechanisms to allow development on difficult terrain.

CodeWright facilitated an Advisory Committee of City officials, staff, and members of the development community in the preparation of a new comprehensive subdivision ordinance that addressed conflicting language, added clarity to minimize the need for interpretation, included new enforcement provisions, and added several national best practices. The new subdivision ordinance included an administrative adjustment procedure, a comprehensive fee-in-lieu system, an updated set of performance guarantee provisions, comprehensive owners' association provisions, and several hundred new definitions. The City adopted the new subdivision ordinance in March, 2020.

KEY PROJECT FEATURES

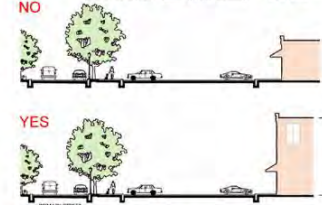
- Comprehensive set of street design standards
- Consistent with "160D" requirements
- New fee-in-lieu system
- Owner's association formation and maintenance responsibility timing standards
- Hillside development provisions
- Subdivision enforcement standards
- Added over 200 definitions

<http://tinyurl.com/HendersonvilleSubdiv>

ARCHER LODGE NORTH CAROLINA Unified Development Ordinance



PASSIVE	ACTIVE	CREDITED AS SETBACK
Greenway, Trail	Splash Pools and Fountains	Fence
Boardwalk	Playgrounds	Outdoor Dining
Picnic Shelter	Outdoor Fitness Equipment	Seating, Gathering Areas
Streams, Lakes, and Ponds	Boat Launches	Indoor Features



KEY PROJECT FEATURES

- 160D-Compliant procedures and development standards
- 4 types of subdivision procedures with requirements and certificates for each
- An updated plant list with native and non-native species recommendations
- Over 57 pages of defined terms
- Innovative HOA operating standards

Archer Lodge, North Carolina's newest municipality, is facing intense development pressure as I-540 (the "Outer Loop") is being completed on the eastern side of the Triangle. Archer Lodge, a new community with limited resources hired CodeWright, in cooperation with the Brough Law Firm in 2019 to prepare a the Town's first unified development ordinance.

The UDO project focused on establishing a basic set of illustrated development standards for landscaping, parkland, open space, signage, and commercial design standards along with a modern set of 160D-compliant development procedures and definitions.

Following adoption of the UDO on June 7, 2021, the Town began a continuing services contract with CodeWright for assistance with text amendment drafting, codification, assistance with pre-application conferences and development review, and has recently embarked on a comprehensive plan update process that includes exploration of the establishment of an extrajurisdictional jurisdiction.

<http://tinyurl.com/ArcherLodgeUDO>

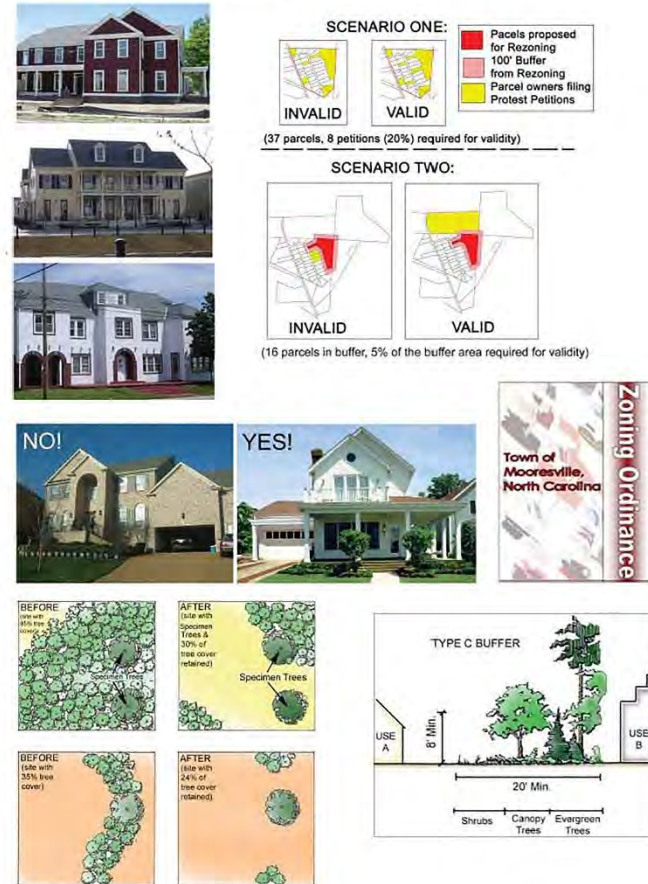
PART J * PROJECT EXPERIENCE

MORRISVILLE, NORTH CAROLINA Design and Development Standards



The town of Morrisville is a fast-growing town of 18,000 people between the Research Triangle Park, Cary, and Durham in central North Carolina. CodeWright has been working with the Town for several years on revisions to its unified development ordinance. CodeWright was retained to prepare new design provisions for single-family, townhouse, and multi-family development in light of recent legislative limitations adopted by the General Assembly. CodeWright has also been retained to make substantive revisions to the town's tree canopy retention regulations. The town was at an impasse with the development community regarding the tree standards, and CodeWright was brought in to facilitate a compromise on tree canopy retention priorities, a three-tiered mitigation system for tree removal, new civil penalties for tree removal violations, and general procedural clarifications. The most recent efforts undertaken with the Town include a comprehensive analysis and revision of the various flexibility mechanisms built into the code for greater consistency with recent jurisprudence.

MOORESVILLE, NORTH CAROLINA Zoning Ordinance



Mooresville, a town of 50,000 people located just north of Mecklenburg County in the Charlotte metro area, selected Chad Meadows (while employed with a different firm) to assist the staff in the preparation of a new zoning ordinance. Mooresville is a fast-growing community on the shores of Lake Norman with its own school district and a highly diversified economy, including the global headquarters of Lowe's Home Improvement Warehouse. The zoning ordinance modernized and streamlined the town's existing development standards while integrating an innovative approach that combined new building form standards within a zoning district context. The town's zoning districts were also updated to address mixed uses, village centers, and form-based concepts. The code includes a generous use of user-friendly techniques such as graphics, illustrations, summary tables, and process diagrams. The ordinance was adopted in 2008. The ordinance won an Outstanding Planning Award from the North Carolina Chapter of the American Planning Association in 2008.

PART K * REFERENCES

The following references can help provide additional details and perspective on working with CodeWright Planners. Additional references are also available at www.codewrightplanners.com.

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THANK YOU FOR THE OPPORTUNITY TO SUBMIT A RESPONSE!