


**To:** Sherry Ashley, City of Statesville  
**From:** Chad Meadows, CodeWright   
**Date:** 9/15/2024  
**CC:** Andrew Ausel, File  
**RE:** Statesville Soars  
Task 1, Project Initiation (7.29 & 7.30) – Trip Notes



## MESSAGE

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These are the meeting notes from the Statesville Soars UDC project Task 1 Project Initiation trip conducted in Statesville on July 29 and 30, 2024. These notes document the activities conducted during the trip and summarize the discussion. Copies of presentation slides are also included. The consulting team also conducted a series of eight stakeholder interviews and five discussions with Statesville elected officials that are summarized in a separate document.

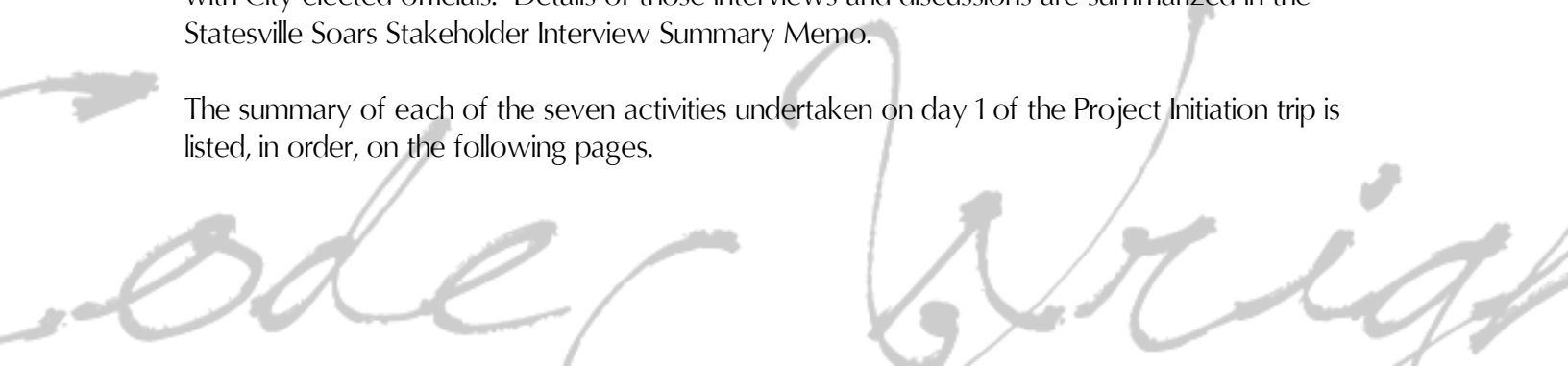
The Statesville Soars project is an effort to update the City's UDC to implement the 2045 Land Development Plan as well as to restructure and modernize the current UDC, clarify development review procedures, add modern uses, and incorporate more graphics and illustrations. The project also seeks to support the City's objectives for greater provision of affordable and attainable housing. CodeWright Planners are the lead consultants for Statesville Soars, but are supported in the efforts to foster attainable and workforce housing by Neighboring Concepts, an affordable housing and architecture firm in Charlotte, North Carolina.

Task 1 of Statesville Soars is Project Initiation. The Project Initiation task includes the following seven activities:

1. Project Introduction Meeting with Key City Staff
2. Introduction Meeting with City Manager
3. Meeting with City Attorney
4. Meeting with City Public Information Officer
5. GIS (Zoning Map) File Exchange
6. UDC Codification Discussion
7. Steering Committee Meeting 1(Day 1)

Day Two of the Project Initiation task included eight stakeholder interviews and two discussions with City elected officials. Details of those interviews and discussions are summarized in the Statesville Soars Stakeholder Interview Summary Memo.

The summary of each of the seven activities undertaken on day 1 of the Project Initiation trip is listed, in order, on the following pages.





## 1. Project Introduction Meeting with City Staff

The Project Introduction meeting was conducted on July 29, 2024, in the conference room in City Hall. The following staff members were in attendance:

- Sherry Ashley, Planning Director
- Herman Caulder, Assistant Planning Director
- Matt Pierce, Assistant to the City Manager
- Emily Kurfees, City Clerk
- April Nesbit, Public Information Officer
- Pete Morrison, Fire Marshal
- Veronica Bateson, Planning
- Christopher Hooper, Planning
- Marci Sigmon, Planning
- Matt Kirkendall, Planning

The Project Introduction meeting is an opportunity for the consulting team City staff to introduce themselves, and hear about some of the concerns from Key staff members. The following is a short list of topics raised during the meeting (in no particular order).

The City follows the adopted Fire Code when considering development, and there is a need to reconcile the standards for better clarity across Planning, Engineering, and Fire.

There is a need to address fire flow complexity and complexities in potable water versus fire protection. There is a private firm (Iredell Water) that has federal contracts to provide fire protection water, but this firm does not also provide potable water. This situation could result in areas where there are dual water providers – one for fire protection and one for potable water. This can result in confusion and inefficiency.

The City would like to prepare and present incentives for the provision of affordable (attainable) housing. The City may pursue a separate initiative focused on affordable housing and the UDC revisions should be configured in ways that support these efforts. There is tension from landowners in the City over this issue, and the City would like to have some ideas about incentives by February, 2025.

Discussion also centered on the issues of utility extension. While the City seeks the extension of water and sewer utilities into vacant and underbuilt areas, the City relies on the development community to extend utilities. As a result, utilities are extended in locations sought by the market or by developers, not necessarily into the areas sought for increased development potential by the City. The net result is that the City does not always get development where it would prefer it to be located. This is especially true with respect to the City's desired patterns of infill and redevelopment.





Staff also clarified that the adopted Land Development Plan is largely silent on the issue of density, resulting in developers and applicants typically seeking R-5 district densities as part of new projects. The new UDC needs to explore the relationship between the future land use map designations anticipated by the Land Development Plan while also contemplating the appropriate range(s) of development density for each future land use designation. The land use designations, in turn, need to be paired with the appropriate zoning district classifications. When this is accomplished, the Land Development Plan can be a more effective guide for future development.

## 2. Introduction Meeting with City Manager

Shortly after the staff introduction meeting, the consulting team met with the City Manager to introduce the project and talk through the Manager's expectations, the political environment, and sequencing issues associated with affordable housing (the City may be looking for a set of incentives, and potentially new regulations, for affordable housing in February, 2025 – well in advance of delivery of UDC language).

The City Manager said that there are nine City Council members, including a long-serving Mayor. The City Council is not monolithic in its ideas about affordable housing. Some on the Council support the provision of affordable housing and want to make its provision a City priority. Other Council members see affordable housing as important, but do not see it as a priority at this time. The Land Development Plan identifies the need for workforce or attainable housing as an important effort for the City to consider.

The Manager discussed a handful of recent developments that are taking place on land located in suburban or peripheral locations, like the Holland Farms development. A community of 900-1,000 homes on 400 acres. The development includes 80 acres of open space, curb, gutter, and sidewalk, as well as land for a school and land for a park. Despite its accolades, there was not a lot of support for the development from County residents. It may be that this lack of support turns on the development's size and distance from the core of the City.

The Manager indicated the desire for a new code that was easy to follow and easy to administer. There is support for increased graphics and development review efficiency. The project will need to take its cues from the elected officials regarding the appetite for raising the bar for development quality.

## 3. Introduction Meeting with City Attorney

Leah Messick serves as the City's attorney and also has her own practice.

She indicates that the City is often involved in land use litigation, including the recent case with Iredell Water Company.

The City has several pieces of special legislation pertaining to the UDC, which are listed on the following pages:





SL 1975-146; Bill H468 – Allows Statesville to exercise the authority granted under NCGS 136-66.3(c) for the public purpose of acquiring lands, easements, privileges, rights-of-way and other interests for public purposes in the exercise of eminent domain. -- <https://www.ncleg.gov/enactedlegislation/sessionlaws/pdf/1977-1978/sl1977-56.pdf>

SL 1977-56; Bill H158 – Amends SL 1975-146; Bill H468 to allow Statesville to also exercise this authority in its planning area as defined in 160A-360 – <https://www.ncleg.gov/enactedlegislation/sessionlaws/pdf/1977-1978/sl1977-56.pdf>

SL 1977-1156; Bill H1599 – amendment to the charter to add streets and sidewalks to Sec. 9.13(a) -- <https://www.ncleg.gov/enactedlegislation/sessionlaws/pdf/1977-1978/sl1977-1156.pdf>

SL 1983; Bill H466 – Amends the charter of the City in section 8.1 – for the procedure for assessments for streets or sidewalks. – <https://www.ncleg.gov/enactedlegislation/sessionlaws/pdf/1983-1984/sl1983-250.pdf>

SL 1987-426; Bill H644 – An act to reduce the number of publications required for local street closing hearings to two consecutive calendar weeks with the first not less than 10 nor more than 25 days before the hearing – <https://www.ncleg.gov/enactedlegislation/sessionlaws/pdf/1987-1988/sl1987-426.pdf>

SL 1989-882; Bill H2040 – 160A-58.1(b)(5) does not apply to the City of Statesville (satellite corporate limits may not exceed 10% of the area within the primary corporate limits) -- <https://www.ncleg.gov/enactedlegislation/sessionlaws/pdf/1989-1990/sl1989-882.pdf>

SL 1991-698; Bill H985 – Statesville may exempt from special assessments levied under Art 10, Ch 160A for the construction of water lines, any property within the area annexed by Statesville, if the property on the effective date of the annexation was situated adjacent to the water lines of either IWC, Piedmont Water, or existing water lines of the City. – <https://www.ncleg.gov/enactedlegislation/sessionlaws/pdf/1991-1992/sl1991-698.pdf>

SL 2005-143; Bill H1020 – An act authorizing Statesville to regulate demolition of structures within the City's historic districts -- <https://www.ncleg.gov/enactedlegislation/sessionlaws/pdf/2005-2006/sl2005-143.pdf>

## 4. Meeting with City Public Information Officer

The consulting team met with the City's PIO to discuss the proposed public engagement plan for the Statesville Soars project. The plan includes the development of a project website with project-specific branding to be maintained by the consulting team throughout the project. A series of 8 stakeholder meetings (slated to be conducted on 7/30/24), the formation of a project Steering Committee (comprised of City staff and officials) who will meet at least six times a key project milestones. The plan also includes a series of five public forums to review draft work products and the draft Zoning Map, a series of 7 meetings with either the City Council or the Planning Board (as determined appropriate by the City) throughout the project, and a series of office hours slots available to anyone who would like to meet with the consulting team during one of its trips to the City.

The PIO also talked about the City's current logo and branding conventions, and the need for the project webpage to cover, in detail, why the City is undertaking the UDC project. The group also talked through some potential project names (the PIO and the City staff settled on "Statesville Soars" on August 30.





## 5. GIS Zoning Map File Exchange

The City has GIS staff who are responsible for maintaining the Official Zoning Map (the zoning map is part of the UDC). The Statesville Soars scope of work anticipates the development of a new Official Zoning Map as part of the project. There are likely to be some new zoning district names, some zoning district consolidations, and potentially the addition of new zoning districts which may either be mapped or simply made available for landowners to request. The degree of change between the current map and the new zoning map will be better understood in the coming months, but the intention is to take a “light hand” and avoid the creation of nonconforming situations where possible.

The GIS staff outlined a series of concerns with the City’s current zoning map to be reviewed as part of Statesville Soars, including:

- Conversion of current zoning polygons into shapefiles that follow lot lines;
- Removal or consolidation of “slivers” or narrow bands of zoning designation left over from map corrections or from other changes;
- Corrections to areas where base zoning districts overlap one another;
- Corrections to the Zoning Map to remove zoning from public street rights-of-way;
- Reversions to speculative zoning district designations that have never been acted upon.

City staff supports the conversion of the polygon-based zoning map to a parcel-based zoning map and is open to discussion of alternative district color conventions based on best practices and industry standards.

The Statesville Soars project team will need to work with the City’s GIS staff to maintain and promulgate a summary of the changes to the current zoning map as the project progresses.

## 6. UDC Codification Discussion

The City currently relies on an outside codifier to maintain and update the UDC text. The Statesville Soars project anticipates the development of a new UDC document in Microsoft Word 365 that is based upon Microsoft Styles settings and other automatic features like automatic numbering, automatic cross referencing, automatic indexing, and aspects. The new UDC utilizes page layout and font techniques that help readers understand relationships in the text as well as summary tables that include colors and images.

By developing the document in Microsoft Word with proper construction and integration of automatic document features, the resulting UDC may be easily converted to a digital portable document format with “off the shelf” software the City already owns and that City staff already knows how to use. In this way, the City can begin to maintain and codify its own regulations and text amendments without the need for an outside codifier.





The City Clerk and the consulting team went over several other examples like the Burlington UDO, the Clayton UDO, the Laurel Park UDO, and others to demonstrate what is possible. Each of these examples includes development ordinances that are codified and maintained in house.

<https://www.burlingtonnc.gov/2048/Unified-Development-Ordinance>

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

<https://www.laurelpark.org/government/code-of-ordinances>

The City Clerk will make the ultimate determination about how the UDC is codified as the project progresses, though the City will be able to maintain and update its own document in house, should it decide to do so.

## 7. Steering Committee Meeting 1

The project Steering Committee is a group of City staff and appointed officials formed to provide high-level guidance to the consulting team as work products are prepared. The Committee includes staff from Planning and Zoning, Public Works, Public Utilities, Parks and Recreation, members of the Technical Review Committee (TRC), and the Planning Board. The Steering Committee provided “first-blush” reactions to ideas and work products and also helps identify issues for further consideration.

The Steering Committee is expected to meet at least six times prior to the commencement of the adoption portion of the project. The initial meeting of the Committee was held to introduce the consulting team, the project scope and schedule, explain the role of the Committee, and collect initial thoughts about the project. The consulting team also shared the following observations about the current land use policy guidance and current development regulations, which are organized into three sections: Introductory Issues, Policy Guidance, and Current Regulations.

### INTRODUCTORY ISSUES

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- Project Objectives: Increase housing supply, adding redevelopment incentives for focus areas, making the code more user-friendly, implementing adopted policy guidance, placemaking and aesthetic improvements, and raising the bar for development quality.
- The project will take place from now (July 2024) until December 2025 and will include several rounds of staff review and edits.
- The Project Initiation task includes naming the project. A couple of options were mentioned including: Statesville Synergy, Streamline Statesville, Envision Statesville, Statesville Solutions, Blueprint Statesville, and a few others (the name “Statesville Soars” was selected by the City at the end of August).
- Project initiation will also include generation of a logo, website and other deliverables to kick off the project.
- The Stakeholder Committee is comprised of our “idea” people who intentionally stay out of the nitty-gritty details and provide conceptual guidance. There is no leadership or voting.





### **POLICY GUIDANCE**

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The Land Use Plan has three legs (in bold below). Each of these were discussed:

- **Prioritize growth and reinvestment:** How are the strategic areas tied to zoning? How do these gateway corridors relate to the zoning districts? Who will pay for infrastructure improvements? How will we create enough incentives for development to focus in the priority areas and not just move to the periphery of the City?
  - Clear predictable process: This is in place for most development forms except for multifamily which is decided in a quasi-judicial manner.
  - Infrastructure – tiered growth map for infrastructure expansion has mixed results on directing infrastructure investment.
  - You want to discourage reliance on wells and septic. Alliance with Iredell County has had both challenges and benefits. Fire station service is one of the issues.
- **Support Expansion of the Local Economy:** A positive climate for new business. Sherry mentioned that the quarry is an important business operation to the City and when improvements are proposed there is always community pushback. It was also noted that the ease of approvals and staff review for site plans are one area of focus.
- **Enhance Quality of Life**
  - Balancing housing supply with maintenance of that housing may be a challenging task.
  - Public facilities and connected streets. Community is good with the concept unless its their neighborhood. Sherry noted that the current code says that street stubs should be connected but when it comes down to a decision by city council or the planning board.
  - Street trees- need to navigate conflict between planning and fire access
  - Floodplain ordinance update is coming up, the policy calls for no new buildings in the floodplain.

Discussion also addressed the need for a stronger connection between the adopted policy guidance and the zoning map.

- Do we have the latitude we need to set down a translation table and set down densities for each of the zoning districts?
- Staff advised that the periphery of the City will be heavily debated. The rural areas of the City are upgraded to the “yellow” category if sewer is extended. Do we want to allow the rural (green) areas to turn to yellow? One stakeholder sees the benefit of allowing some of both- both suburban areas for new nice subdivisions and infill redevelopment.

### **CURRENT REGULATIONS**

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- The current code is fairly well structured, but there are a handful of issues that may need to be addressed. Each of these will be identified in the Code Diagnosis (being prepared in Task 2). Some of these items included the following:
  - City Council deciding on multifamily and special use permits is not ideal. This body is best making decisions where they can talk to all the parties and problem solve as opposed to adjudicate.
  - 26 base conventional districts is too many, 25 parallel zoning districts. 300+ uses in your use table.
  - Non-conforming standards are too short.
  - Rules of measurement are in the development standards section and they should be their own section.
  - Applicability sections are too complicated.
  - Sign standards are ok but need some important legal updates.
  - No fencing, wall, screening standards.





# Statesville Soars

## Task 1 Project Initiation - Trip Notes

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- Screening for outdoor storage is in the prescribed conditions
- No illustrations for the design standards. Need to add some of these.

### **OTHER QUESTIONS FROM STAFF**

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- Cluster subdivisions are giving us the best product today because of the open space and amenities provided.
  - Consulting team recommended the conservation subdivision as a great option. They need sewer service, require almost half of the site to be conserved as open space. Developers like it because it reduces the amount of infrastructure they need to provide.
  - Planning staff have already started reviewing this. They would like to see if there is anyway to include different housing types like townhomes and small multi-family.
    - Consulting team noted that very few of these are permitted because of the political issues and, banks aren't always willing to lend for this.
    - These rules generally allow the same residential yield but require more open space.
- Bell Farm subdivision is a good case study for the consultant team to look at. They did plant some younger trees and had utility easements that limited them but the plantings aren't impressive.
  - Everyone wants to regulate building materials. Staff tries to use conditional zoning to get better materials but this is really the only tool Statesville has.
- Sherry noted that the current code doesn't have any multi-family design standards and could be a good concession to Council to balance out the restriction of density for single family.
- The current code uses a lot of "should" and this needs to be cleaned up.
- The growth tiers are always changing because of Council policy to change the growth tier once the pipes are extended. The sewer is a key driver for redevelopment. Consulting team would like to add standards to require more for new subdivisions in these areas where extension is an issue to meet the need as the plans come in.
- The City has issues with water providers putting in pipes that are too small. County regularly requires space on each of these sites for a well. Can Statesville prohibit wells?
  - The City can prohibit utility infrastructure in open spaces.
- Schools were discussed. It's not possible for us to write an adequate public facilities ordinance for Statesville because it's a heavily litigated issue and its unlikely to get school board support.
- It's important that the City enforces proper maintenance for downtown buildings that are falling apart. Consulting team mentioned that we need minimum maintenance requirements and some facade grant money to fund improvements when an owner is cited for a violation.
- Can we eliminate the use of "homemade signs." - Yes we can limit sign materials
- There are downtown design guidelines that are different than what applies to the rest of the City. Consulting team wants to talk about this more because they shouldn't be called "guidelines."

In addition to the discussion, the consulting team also provided an initial introductory presentation to the Statesville Soars project. The slides from the presentation are included on the following pages.







**Statesville**  
Unified Development Code  
Steering Committee Meeting 1 • 7.29.24

# OVERVIEW

01	Team	05	Committee Role
02	Project Objectives	06	Land Use Plan
03	Scope & Schedule	07	Discussion
04	Task 1 - Initiation	08	Next Steps

# 1. TEAM

**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

**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

# 2. OBJECTIVES

<b>POLICY IMPLEMENTATION</b> <ul style="list-style-type: none"> <li>2045 Land Development Plan</li> <li>2019 Mobility Development Plan</li> <li>Recreation &amp; Parks Master Plan</li> </ul>	<b>BROADEN HOUSING OPTIONS</b> <ul style="list-style-type: none"> <li>'Missing Middle' housing options</li> <li>Incentives for workforce housing</li> <li>Conservation subdivisions</li> </ul>	<b>PROMOTE INFILL &amp; REDEVELOPMENT</b> <ul style="list-style-type: none"> <li>10 Gateway Corridors</li> <li>Redevelopment Areas</li> <li>Infrastructure Tiers</li> <li>Compliance flexibility for non-conforming sites</li> </ul>
<b>USER-FRIENDLY CODE</b> <ul style="list-style-type: none"> <li>Illustrations &amp; graphics</li> <li>Dynamic page layout</li> <li>Summary tables &amp; flowcharts</li> </ul>	<b>PLACEMAKING FOR ECONOMIC GROWTH</b> <ul style="list-style-type: none"> <li>Parks &amp; open space</li> <li>Mixed-use development</li> <li>Aesthetics along corridors</li> </ul>	<b>RAISE THE BAR FOR QUALITY</b> <ul style="list-style-type: none"> <li>Infill compatibility standards</li> <li>Multi-family design controls</li> <li>Enhance landscaping &amp; screening</li> </ul>

# 3. SCOPE & SCHEDULE

# 4. PROJECT INITIATION TASKS

- Kickoff Meetings with Staff
- Finalize Engagement Plan
- Project Logo & Branding
- Steering Committee Meeting 1
- 8 Stakeholder Interviews
- Initial Meetings with City Council
- Webpage Launch

# 5. ROLE OF THE COMMITTEE

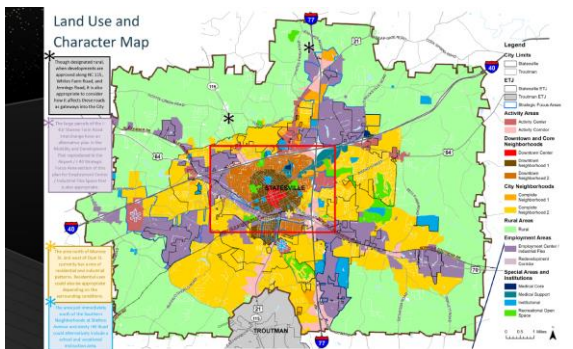
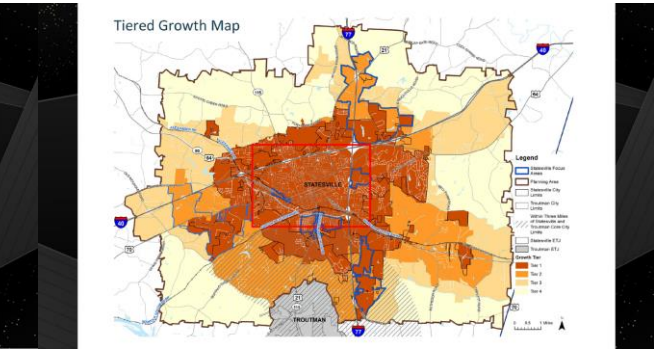
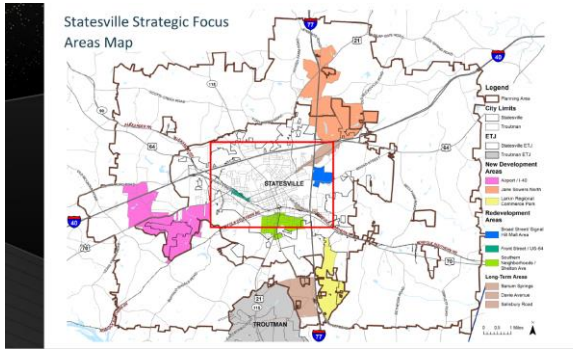
<b>Technical Experts</b>	People who understand development codes
<b>Sounding Board</b>	Group to discuss ideas, not get bogged down in details
<b>Initial Reviews</b>	First to see work products
<b>30,000 feet</b>	See the 'big picture'
<b>Spread the Word</b>	Inform constituencies about status
<b>No Voting</b>	This group does not do line-by-line reviews or voting

# 6. LAND USE PLAN

- Prioritize Growth & Reinvestment
- Support Expansion of the Local Economy
- Enhance Quality of Life

City's attractiveness, sense of place, and intangibles are critical to attracting and maintaining a talented workforce





## 7. DISCUSSION

- Key issues to address
- Questions to be answered
- Topics to include in UDC
- What else?

## 8. NEXT STEPS

### CODE DIAGNOSIS

- Review of current UDC
- Gap analysis between policy goals and current regulations
- Exploration of housing situation
- A series of recommendations

## Thanks!

END OF REPORT