

Co-Chair Report on Lessons Learned from the Central West Planning Process

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Introduction

On November 26, 2013, the Town Council unanimously endorsed the Central West Focus Area small area plan. This planning effort was initiated through a community-driven process, the recommendations of which were approved by Council with minor amendments in October 2012. The planning process itself was conducted by the seventeen-member Central West Steering Committee (CWSC) appointed by the Town Council, assisted by the planning consultants Rhodeside-Harwell and Town staff, with two members of the Committee elected to serve as co-chairs.

The work of the Committee took nearly a year and involved thirty-four full committee meetings that averaged three hours each, several subcommittee meetings, and at least seven community outreach events. The result is a thoughtful, realistic plan that effectively balances the needs of the town as a whole, the surrounding neighborhoods, and the planned new UNC campus at Carolina North.

While the outcome was ultimately successful, the process itself was difficult, contentious, and often inefficient. We support ongoing community involvement in planning efforts in Chapel Hill and believe the Town can learn important lessons for future processes from the successes and failures of Central West. Accordingly, we are pleased to share our observations regarding Central West and offer suggestions for the design and conduct of future efforts. Please note that these recommendations were developed solely by the Committee co-chairs and reflect only our assessment of the process and its lessons.

Summary of Conclusions

Central West can serve Chapel Hill as a useful case study of community planning efforts. We believe there are six important lessons to be learned:

1. Community planning processes must begin with an explicit charge from the Town Council that spells out expectations, roles, and other key parameters.
2. Citizens should be tasked with work they can perform effectively (such as determining principles for area development, making decisions among trade-offs, and evaluating consultant plans for suitability). Other work (such as design, identifying and analyzing trade-offs) should be the province of professionals.
3. Committees should be small enough to work efficiently; ten to twelve is a more realistic maximum for a working group than seventeen.
4. Voting rules should be designed in conjunction with committee size and makeup, so that all decisions will be the result of broad-based agreement.
5. Community involvement should be well managed, with clearly defined expectations and adequate resources to ensure that those expectations are met.
6. Finally, given the challenges inherent in these efforts and the likelihood that the Town will conduct more of them, we believe that Chapel Hill should develop a standard process for future community planning efforts.

Recommendations

1. Begin with a Specific Charge from Council

The charge that a committee receives from the Council is crucial in setting the goals and process for the group and the community's expectations of the effort.

In the case of Central West, while the time frame, planning area, and overall goal were well specified, at least three other important parameters were less clear: Council's big-picture objectives for the area (i.e., did they desire a change from the currently allowed levels of development?), the level of detail for the Committee's recommendations, and the role of the Committee vis-à-vis the community (the Committee as a conduit for community input vs. the Committee as a representative body charged with weighing input from multiple sources).

The lack of clarity in some elements of the charge often caused confusion and contention within the Committee, misunderstanding and conflict with community members, and many hours of Committee discussion that would better have been spent working on the plan itself.

Accordingly we suggest that for future community planning efforts, the Council provide as much clear direction as possible regarding the following:

- **Desired product and scope of work**—Is the group tasked with producing a small area plan, advice on whether to move forward with a development agreement, an NCD plan? Council should also specify what decisions the group will make and the level of detail to which they should work: Is the group providing principles and objectives for development? Providing general height/density/use recommendations? Working to decide more detailed issues like streetscape design? Setting goals for traffic performance or environmental mitigation?
- **Planning context**—Overall rationale for the effort, whether new development/change in land use or intensity is desired, specific Council goals for the area, and how those goals contribute to meeting overall town planning objectives.
- **Committee's authority**—Is the committee deciding on and authoring its own report/plan/recommendations, or is it largely advising Town staff and consultants on a report/plan/recommendations that they are developing?
- **Time frame and milestones**—Total amount of time allocated for the process and whether there should be interim reports to the Council and, if so, at what key points.
- **Role of the committee vis-à-vis the community**—Is the committee a conduit or a representative group?

2. Focus Community Members on What They Do Best

The CW process involved the Committee in three major activities: developing a vision, principles, and objectives for the area; planning for bike and pedestrian circulation and new street design; and making recommendations regarding land use, density, and intensity. The Committee functioned well when doing the first two and struggled mightily with the last.

The visioning/principles and objectives phase was successful for a number of reasons. This is an area in which citizens can rightfully be considered the "experts" on the area in which they live and the principles they hold most strongly. Also, because this stage of the process is still somewhat abstract, it is easier for a committee to reach agreement and find common ground with the broader community.

Circulation design was also accomplished smoothly, thanks to good input from the urban design consultants that received strong support from Committee and community members.

For many reasons, the Committee adopted the role of planners/designers in the third part of the process. As a result, progress was slow; trade-offs inherent in certain options were often not clear; and the laypeople on the Committee found themselves tasked with making technical judgments for which they were ill equipped.

Community members can make good planning decisions when provided with clear information about trade-offs, reasonable expectations of what is feasible, and a range of options from which to choose. We recommend that future area processes be designed so that citizens are making the kinds of decisions that they can make efficiently and competently:

- With good background data and basic logistical support, community members on a committee are well equipped to develop area visions and lists of principles and objectives for future development.
- Once these are accomplished, it should be the role of technical experts (staff and consultants) to create a broadly reasonable range of options for meeting those visions and principles, clarifying the trade-offs involved in each, obtaining the data necessary to understand the consequences of different decisions, and educating committee members about their options.
- Given this information, committee members are competent to weigh the options presented to them and decide which best fit the mission, principles, and objectives they have articulated.

3. Establish Effective Committee Size and Composition

The CWSC was large (seventeen members plus a Council liaison) and based on constituencies (residents, landowners, business owners, advisory board members, etc.). While this ensured a diversity of opinions and expertise, it also presented challenges.

The size presented logistical challenges—our attendance was excellent (never less than fourteen or so members), and a significant amount of meeting time was consumed if many members wished to express an opinion on a specific issue, even if they spoke for only a minute or two. Accordingly, we suggest that it would be desirable for committees to be smaller to enable more efficient meetings, with a target maximum of ten to twelve people.

Even with a committee of this smaller size, it still is difficult to do substantive work with the full group. The CWSC used subcommittees effectively to draft the principles and objectives from Committee and community input and in revising the final plan document. We recommend that future groups should divide into working groups or subcommittees as necessary, with these groups doing the substantive work on an issue and reporting their conclusions back to the larger group for discussion and approval.

4. Create a Voting Structure that Fosters Broad-Based Agreement

During Central West, there was often conflict between the goals of residents of the immediate area and broader town-wide concerns.

The Committee was made up of approximately half local residents and half other stakeholders. We adopted a two-thirds voting rule, which ensured that neither group could dominate the votes and that any

recommendation would have buy-in from a significant number from both constituencies. We recommend that subsequent community processes adopt a similar voting model.

5. Manage Community Involvement

The CW process promised significant community input—which promise was kept. We had three large community workshops, drop-in sessions, outreach efforts, prompt posting of committee meeting materials online, and community comment periods before and after each committee meeting.

That said, there was no defined process by which the community's input was catalogued, reviewed, discussed, and responded to. This contributed to frustration and anger on the part of community members who felt their input was being ignored by the CWSC. Although partly the result of differences of opinion between community members and the Committee, some of the frustration occurred because despite heroic efforts by our staff support team, the level of resources available to work with the community was incommensurate with what was needed.

We also underestimated the importance of good public information efforts in keeping community members correctly informed of Committee actions and how community input was being integrated into the Committee's process. It must also be said that lack of a clearly defined Committee/community relationship helped to fuel certain expectations of responsiveness to community wishes that were not met by the Committee.

Another challenge faced by the Committee was securing input from town stakeholders as a whole and not only the residents from the immediate area. While there was exceptional engagement with nearby residents, securing the participation of a broader cross-section of the community proved nearly impossible. While we do not have a solution for this issue, we view it as one that needs significant attention.

We recommend that in future processes:

- The roles of the committee vis-à-vis the community be specified clearly in the charge (i.e., is the committee a conduit or a representative body?)
- The way in which the community will be listened and responded to be clearly defined.
- The appropriate level of resources be allocated to make sure that staff can meet those promises for receiving community input and communicating clearly how the committee has responded. It might be useful to involve the Town public information officer in such efforts.
- The Town explore ways to increase broad community input on small area plans.

6. Develop a Standard Process for the Future

The Central West Committee was given the charge of setting up and managing its own process, and many of the difficulties the Committee encountered stemmed from this initial decision, which resulted in the group beginning work without having a well-defined process in place. This also contributed to difficulties with the consultant's contract and scope of work.

Because Chapel Hill is likely to continue community-planning processes in the future, we believe that it would be in the Town's best interest to develop a standardized process for conducting these efforts. This would eliminate many of the problems with inefficient work planning and process wrangling that

occurred with Central West and set a clear road map for efficient committee work. While no two processes will be identical, we believe that there will be sufficient similarities to justify this step; once a standardized process has been developed, it can be easily modified to fit the needs of each particular planning effort. Further, once accepted as “the way things are done in Chapel Hill,” a standard process will make planning and implementing such community processes simpler, less expensive, and less contentious.

We recommend that Council consider using an expert in facilitation work—and someone who is seen as a neutral party by the community—to develop such a process.

Based on our experience with Central West, we believe that such a process should address the following issues:

- Nature of the charge to be provided by the Council
- Guidelines for size and composition of committees (including need for/role of subcommittees)
- Tasks of the committee, and clarity on their role in each task: when they will act in an advisory role (such as providing input and critique to designers) and when they will be the decision makers (such as when they create area principles, select among options provided by consultants, or approve the text of their final report)
- Responsibilities, particularly in terms of overall process leadership, conduct of meetings, and community relations: How will work be shared between committee members, co-chairs, Town staff, and consultants? Who will develop the work plan, prepare meeting agendas, lead/facilitate meetings, and act as committee liaison with community members?
- Key work steps, decisions, and milestones
- Voting rules
- Role of outside facilitators/mediators
- Means by which community input can best be sought and utilized

Conclusion

The Central West small area planning process ultimately achieved its goal of developing a realistic, forward-thinking, broadly accepted vision for the Central West area. While the outcome was successful, the process itself was lengthy, often inefficient, resource-intensive, and sharply contentious.

We support continuing Chapel Hill’s tradition of including community members in substantive roles in planning the town’s future and encourage the development of a process with the requisite clarity and structure to make such efforts effective and useful to the Town and the Council and less onerous and contentious for community participants. Central West can provide a valuable case study for what works well—and not so well—for large community planning efforts in Chapel Hill. We hope that this report will be useful to the Council and Town and would be pleased to discuss our report or provide additional information should Council wish.

Finally, we thank the Council for allowing us to serve on the CWSC and the Town staff for their herculean efforts in bringing the plan to completion.