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# CharMeck Community Sustainability Plan Feasibility Study

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## EXECUTIVE SUMMARY

Over the years, the City of Charlotte and Mecklenburg County (“CharMeck”) have developed a number of plans, policies, and governing documents that support a sustainable community. While these documents are filled with insightful information, there has not yet been an effort to consolidate this material, bring together interested parties, and develop a unified vision that supports a sustainable CharMeck.

As the City of Charlotte and Mecklenburg County began to explore the idea of working together to achieve these goals, it was determined by staff that a feasibility study was needed. This study has been prepared over the course of two months and serves to provide a clear directive on whether a community sustainability plan (CSP) is feasible by answering the questions, *Why should or shouldn't CharMeck consider developing a CSP? Based on research and stakeholder feedback, which solutions for moving forward make the most sense? What is to be gained or lost by moving forward? What resources (time, money, effort) will be required?*

Local governments continue to explore the issue of developing CSPs because of the potential benefits that can result, like better cross-jurisdictional and cross-departmental coordination and collaboration, enhanced communication with policymakers and stakeholders regarding sustainability priorities, improved positioning for grant funding, awards, and recognition, cost-savings from the implementation of initiatives developed in the CSP, and many others.

Six scenarios for moving forward are presented by ICMA and are summarized beginning on page 3 of this Executive Summary, and described in greater detail in Section 4 of this study. It should be noted that for each of the scenarios presented, a triple-bottom-line approach is recommended, or one that incorporates the environment, economy, and social equity aspects equally. This approach is supported by thought-leaders in the sustainability field, and was confirmed as the preferable focus of a sustainability planning effort through stakeholder interviews and meetings.

ICMA has made the recommendation to move forward with a melding of two scenarios as the most feasible solution. This solution entails developing a common vision and a high-level framework that provides the foundation and context for building upon the Quality of Life (QOL) Study. ICMA made this recommendation based on research and stakeholder feedback. Stakeholders interviewed by ICMA felt strongly that the City and County at least do *something* to provide an opportunity to collaborate, and join together jurisdictions and community stakeholders.

To inform the feasibility study, the following information sources were used: ICMA survey data; analysis of sustainability plans, processes and programs from around the United States; meetings with CharMeck region local government staff and local non-profits; interviews of 18 CharMeck community leaders; as well as detailed case studies of 14 communities. Please see the Appendix for full case studies (Appendix A), summaries of local stakeholder interviews (Appendix B), stakeholder meeting notes (Appendix C), and additional resources consulted (Appendix D). A review of City, County, and regional CharMeck documents was also conducted.

All of these resources inform the “Findings” that are inserted at the beginning of each relevant section of this document, the Scenarios in Section 4.0, and the Recommendations in Section 5.0. The findings are brief summarizations of information that stood out during research or stakeholder interviews and meetings. Scenarios in Section 4.0 were developed as potential paths forward for CharMeck, and include a number of distinct options and features. The scenarios range from business-as-usual to the

development of a full-scale CSP, and also include the many shades of gray in between. Recommendations in Section 5.0 include ICMA’s recommended scenario, and general suggestions based on what was learned.

### *Prominent Findings*

Of the many findings sprinkled throughout this study, there were a few that stood out because they were mentioned by multiple stakeholders, have particular relevance to CharMeck, or were especially insightful. Following are a sampling of the more prominent findings:

- **Terminology Matters.** “Quality of life” is a phrase that is understood and supported among CharMeck residents, whereas the word “sustainability” can be divisive and perceived as a concept that places individual property rights at risk. As an alternative to the word sustainability, some communities have used phrases such as livability (“Denver Livability Partnership”)<sup>1</sup>, tomorrow (“The Tomorrow Plan”)<sup>2</sup> or pointed to a specific year (“Central City 2035”)<sup>3</sup>. Other jurisdictions have redefined sustainability. San Antonio’s Mission Verde Sustainability Plan focused largely on the ability to compete successfully in a 21<sup>st</sup> Century global economy.<sup>4</sup>
- **Knit Together Existing Resources.** The City of Charlotte, Mecklenburg County, and the CharMeck region have many existing efforts that address sustainability, including but not limited to a regional HUD planning grant (“Connect Project”); Quality of Life Study; Envision Charlotte plan; comprehensive plans of the towns in Mecklenburg County; Mecklenburg County’s Environmental Sustainability Plan, and Blueprint for a Healthier Generation, 2020; and the City of Charlotte’s Centers, Corridors and Wedges Growth Framework and Sustainable City Facilities Plan. A frequent comment heard during ICMA’s information-gathering processes was that a CSP could help “knit together” existing activities.
- **Engagement beyond Public Hearings.** Community engagement is an important part of developing a CSP. By inviting the community to have a seat at the table, CharMeck local governments can hear from stakeholders about common areas of interest and goals. By participating in the engagement process, stakeholders will have greater buy-in and understanding of the project. CharMeck stakeholders have successfully used community engagement tactics such as small group discussions, meetings with established civic groups, automated calls, traditional mail surveys, and online outreach like the development of project websites, the use of two-way communication tools, and surveys.
- **Goal Setting and Performance Measurement Matters.** ICMA research suggests that the adoption of a specific sustainability resolution or other policy action with specific goals and targets can lead to expanded actions by the jurisdiction. A CharMeck CSP would benefit from the existing quantitative measures and approaches undertaken by the Quality of Life data, because a potential performance measurement system is already in place in the community.

1 <http://www.denvergov.org/TOD/TODStrategicImplementation/tabid/438465/Default.aspx>

2 <http://www.thetomorrowplan.com>

3 <http://www.portlandoregon.gov/bps/47907>

4 <http://www.sanantonio.gov/oep/SustainabilityPlan/Summaries/Introduction.pdf>

The findings were then used to help develop the scenarios and recommendations.

### *Summarized Scenarios*

Scenarios were developed as a means to take the information learned from research and stakeholder feedback (as described in the findings), and use it to answer the question, “knowing what ICMA knows

(about sustainability plans generally and CharMeck specifically), what are the most promising options for a path forward?" These scenarios are summarized below:

**Scenario 1: Business as Usual.** Continue on the current course and proceed with business as usual.

**Scenario 2: Meeting of the Minds.** Continue the conversation between the City of Charlotte, Mecklenburg County, and the towns in Mecklenburg County to discover a common vision and areas of interest where collaboration and coordination may benefit all parties.

**Scenario 3: Framework.** Agree to a common set of guiding principles that each community is working towards, without proscribing how to get there. Common elements of existing vision and mission statements could present a starting point for the discussion.

**Scenario 4: Quality of Life 2.0.** Use the Quality of Life (QOL) Study to build a more integrated sustainability strategy for the CharMeck region. Many of the indicators addressed in the QOL Study have sustainability implications, as the concepts of sustainability and quality of life have significant overlap. Develop goals for specific indicators, and a plan for reaching those goals.

**Scenario 5: CharMeck Collaborative.** Promote cross-jurisdictional and public-private partnerships in support of regional action planning on sustainability and climate change. Establish a formal yet flexible Collaborative that defines expectations, and removes ambiguity as to how the partnership should function.

**Scenario 6: Community Sustainability Plan.** Develop a CSP using material from existing documents, and glean additional information from stakeholders. Each chapter of the plan focuses on a particular topic, and could include background information on progress that has already been made, and current programs. Also included would be goals attached to metrics (i.e. reduce energy used in commercial buildings 15% by 2025), and implementation steps detailing how the goal will be met. Each of the scenarios is meant to build from the previous scenario, and should be thought as a continuum with interchangeable features.

### *Prominent Recommendations*

In addition to the scenarios, a set of recommendations is included in Section 5.0. In this section, ICMA recommends moving forward with Scenario 3 (Framework) as a baseline for developing a common vision that would then provide the context for building upon the QOL Study, as described in Scenario 4 (Quality of Life 2.0). ICMA selected the hybrid Scenario 3 and Scenario 4 model based on research and stakeholder feedback. There is great interest in seeing the local governments move forward with an effort that allows for greater coordination and collaboration. Stakeholders also expressed concern over developing an effort that is redundant or not achievable. Based on ICMA's research, using the QOL Study is the best means to reach the desired end.

General recommendations were also developed based on research and stakeholder interviews, and the scenarios provided the proper context. The recommendations can be applied to any of the scenarios, and a sampling of the most prominent recommendations is included below.

🔗 ***Framing the Issue and the Path Forward.*** The word "sustainability" has become somewhat of a lightning rod and it may be that the CharMeck effort should be branded differently and in a way that resonates with as many stakeholder constituencies as possible. Themes, branding, taglines and terms should be carefully considered when moving forward. Additionally, it should be clear that sustainability

is perceived differently and in most places is interpreted at the local level. A path forward that allows some communities and jurisdictions to focus on larger sets of issues while others may only opt for a smaller subset would seemingly provide a viable approach for a CSP. Sustainability planning need not change the individual character of the communities in Mecklenburg County.

- ***Develop a Mechanism for Working Together.*** Use this opportunity to convene stakeholders in a cross-jurisdictional and multi-stakeholder process. Hold a meeting of the minds with, at a minimum, staff from the City of Charlotte, Mecklenburg County, and the towns in Mecklenburg County. This will afford an opportunity for jurisdictions to begin discussing priorities, goals, and opportunities for collaboration, now and in the future. At the onset of the project, there should be a process whereby the jurisdictions in Mecklenburg County can opt in or out of participation.
- ***Single Point of Entry.*** When getting started, CharMeck needs to establish a single point of contact that is easily identified and can clearly communicate the stages and phases, successes and challenges of developing a CharMeck CSP. Similarly, an advisory committee or board of directors that can provide strategic direction might also be warranted at the outset of a planning process.
- ***Keep it Manageable and Achievable.*** Determine what can reasonably be accomplished with available resources and move forward accordingly. As expressed during stakeholder interviews, the community is more interested in seeing the jurisdictions in Mecklenburg County successfully move forward with a small-scale effort rather than creating an effort so comprehensive that it's too cumbersome to manage and too challenging to implement.
- ***Two Key Partners.*** The Metropolitan Studies Group at the University of North Carolina, Charlotte and the Foundation for the Carolinas should be considered as priority partners in each of the scenarios. The Metropolitan Studies Group is already familiar with the indicators that are relevant to sustainability and with CharMeck local government staff. The Foundation for the Carolinas has successfully engaged the community on a broad range of issues, compensated through a variety of funding arrangements.

### *Going Forward*

There are many ways to approach the issue of sustainability planning in a large metropolitan area that, to its credit, has done much of the legwork and data collection that would be included in a community sustainability plan (CSP), or any other large-scale effort. In many ways this is a double-edged sword. Because CharMeck is neither at the beginning of the sustainability planning process nor the end, the challenge is in deciding where to jump in the middle, with whom, and in what direction. To a great extent, the CharMeck community is embarking on reverse engineering. The Quality of Life study has provided much of the data that would be measured in a CSP, but the missing piece is an actionable strategy to get from point A to point B. No matter which course of action is chosen, based on research and stakeholder feedback, a coordinated sustainability effort is a viable project, and what is most important is that the communities in Mecklenburg County do *something* that encourages collaboration and coordination in one easily identifiable place, be it a person, a document, or a committee.