

**Report to
Charlotte Mecklenburg Community Foundation's
Environment Committee:**

*Connecting
People to People... People to Places... Places to Places...
Through the Preservation of Natural Areas*

March 2005



THE LEE INSTITUTE

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**“If you will it, it is no dream.”
Theodore Herzl**

I. Background

Charlotte Mecklenburg Community Foundation’s Environment Committee engaged The Lee Institute, beginning March 2004, to investigate alternative courses of action that the Committee might undertake in order to protect and improve the environment in the greater Charlotte region. Between March 2004 and November 2004, The Lee Institute explored possible avenues for the Committee to pursue, using a variety of methods: survey, individual interviews, focus groups and research. Through this work it became clear that Foundation For The Carolinas is perfectly positioned to become the key catalyst for a major environmental initiative to improve the quality of life in our region. The idea of preserving open space surfaced as the number one idea for further exploration by the Environment Committee.

In January 2005, The Lee Institute resumed its work for the Foundation by convening a broad group of leaders in conservation and business in order to develop a model for preserving open space in the region. A timeline of meetings and accomplishments for this phase of work (January – March 2005) appears in Appendix A. The invitees and participants at these meetings are listed in Appendix B. These meetings were intended as an open planning process, building on the knowledge of many, in order to achieve consensus on a model for conserving land in our region.

II. Guiding Principles

During the series of meetings facilitated by The Lee Institute, the following principles emerged and are integrated into the proposed model.

- a. *Focus on natural areas.* The intention for this initiative is to preserve scenic vistas, historic landscapes, farms and farmland, forests, and natural habitats in order to protect air and water quality. Urban open spaces, such as plazas, are outside the general scope of this initiative.
- b. *Think regionally; act locally.* While the top priority natural areas to be preserved may cross county lines, local governmental entities must determine for themselves whether and how to act to preserve those lands.
- c. *Collaborate with entities and, possibly, for land, outside the Foundation’s footprint.* Gaston County Community Foundation is a

good example of an organization that may be a valuable partner in this endeavor.

- d. *Leverage existing work.* The focus of future work should be to build on or update plans already completed, rather than creating new plans.
- e. *No new organization:* Building capacity and integrating the work of existing organizations will produce the desired results.
- f. *Avoid a regulatory slant.* While there may be a place for regulatory approaches to land conservation, the group's recommendation is to focus on voluntary initiatives.
- g. *Recognize the need for big capital.* The price of land necessitates commitment of major funds that may only be available through public financing, for example, bond referenda.
- h. *Build in a variety of funding approaches.* While bond referenda may be the largest single public funding source, some local governments may raise public funds in other ways. Private funding may be the only funding source in those areas that cannot raise public dollars.
- i. *Emphasize connectivity.* Building a connected network of natural areas will increase public benefit and ensure that lands conserved are more than the sum of their parts.

III. Definition of "Natural Areas"

Natural areas consist of the following:

- Land in its natural state
 - Wetlands, floodplains, and the vegetated areas alongside streams and rivers
 - Wildlife habitats
 - Restored habitats
 - Forests
- Working lands
 - Farms
 - Managed forests
 - Horse farms
- Recreation lands & areas
 - Bodies of water / blue-ways
 - Greenways, trails and corridors
 - Passive recreation areas (nature preserves, hiking trails)

Natural areas for this project do not include: ball fields; parking lots; golf courses; small grass lots or gardens; or paved urban plazas.

Natural areas may be publicly or privately owned, often provide public access, and always provide public benefit (e.g., clean air and water, aesthetic view sheds, wildlife, and community and natural heritage).

IV. Preamble, Vision and Mission

Preamble

Our region's natural areas sustain our economic vitality, our quality of life, and our connection to place and each other. These vital resources are rapidly disappearing. We must act now to conserve the region's land for today and the future.

Vision

We envision a region of communities characterized by abundant green spaces that connect people to people, people to places, and places to places, and where we have preserved our:

- Carolina Piedmont heritage;
- Air and water quality, scenic vistas, historic landscapes, farms and farmland, forests, and natural habitats;
- Outdoor recreation areas and healthy lifestyles;
- Relationships with each other and with our unique places;
- Connections and public access that strengthen our community character; and
- Sense of place and life in balance.

Mission

To achieve our Vision we will establish the Carolina Piedmont Land For Tomorrow Fund to conserve land in the region. This initiative will:

- Create a conservation leadership structure;
- Enhance the capacity of local land conservation organizations to permanently conserve land;
- Identify and define regional land conservation priorities;
- Prompt governmental units to establish priorities and public funds for conservation of natural areas, honoring local government autonomy and self-determination;
- Leverage funds to preserve strategic lands; and
- Provide an integrated centralized data source to track progress.

V. Overview of the Model

The centerpiece of the proposed model is the establishment and management of a fund at the Foundation, administered by the Environment Committee. This fund will serve as a mechanism for funneling resources to this initiative from a variety of sources, including the Charlotte Mecklenburg

Community Foundation, other FFTC affiliates, corporate partners, other foundations and private sources. It will be used for the following purposes:

- a. Engaging a service provider to identify and update regional land conservation priorities and to serve as a clearinghouse for land conservation data. This organization will track and report on progress of this endeavor over time.
- b. Increasing the capacity of land conservation organizations, via staffing, technology and project development, to conserve natural areas.
- c. Leveraging funds with local governmental entities and land conservation organizations for land or conservation easement acquisition for permanent preservation.

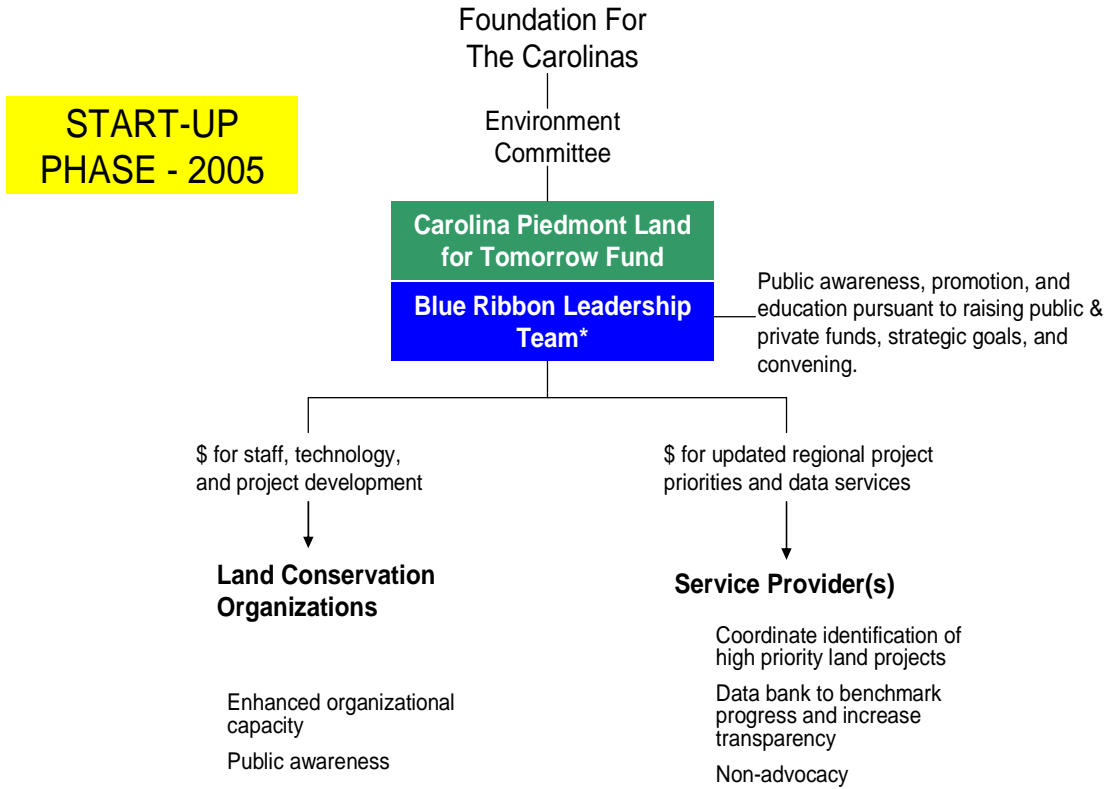
The model needs to be promoted in ways that will resonate with target audiences. Those who have crafted this model are aware that the current presentation needs to be repackaged for the public and, possibly, the business community. Word choices will be very important.

This model also calls for establishment of a leadership team consisting of representatives from the Environment Committee, corporate partners, and key community leaders from the region. The team would be charged with advocating for natural areas and generating the political will necessary to raise the required funds by concentrating on public awareness, promotion, and education. The leadership team would provide the context for groups, such as government and land trust planners, to meet, set goals, and assess progress. They might oversee development of a web-based campaign to promote public support and display progress. The leadership team may need some level of staff support and may need the convening resources of the Foundation to complete its responsibilities.

The following sections present a definition of “natural areas”, a preamble, vision, and mission for this initiative, and a graphic representation of the model. Special recognition goes to Dave Cable, Saxby Chaplin, and Carla DuPuy who lent an extraordinary amount of their time and their expertise to the development of this model. Implementation of the model can begin immediately, and will build on the strong level of interest sustained through the series of meetings held to date.

VI. Graphic Presentation of the Model

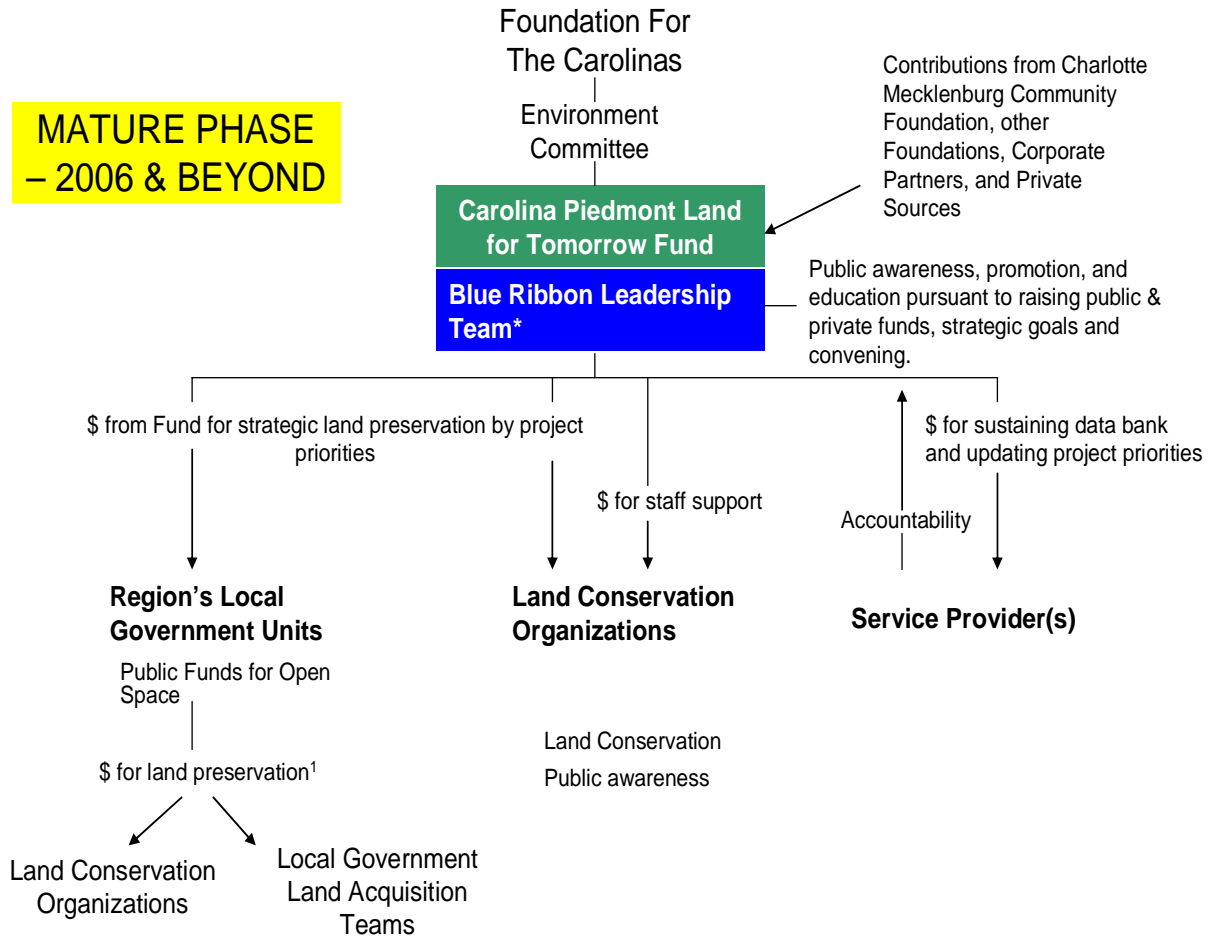
FLOW OF DOLLARS



* Leadership team includes representatives from the FFTC Environment Committee, corporate partners, and key community leaders from the region. The Team is charged with advocating for natural areas and generating the political will necessary to achieve the mission.

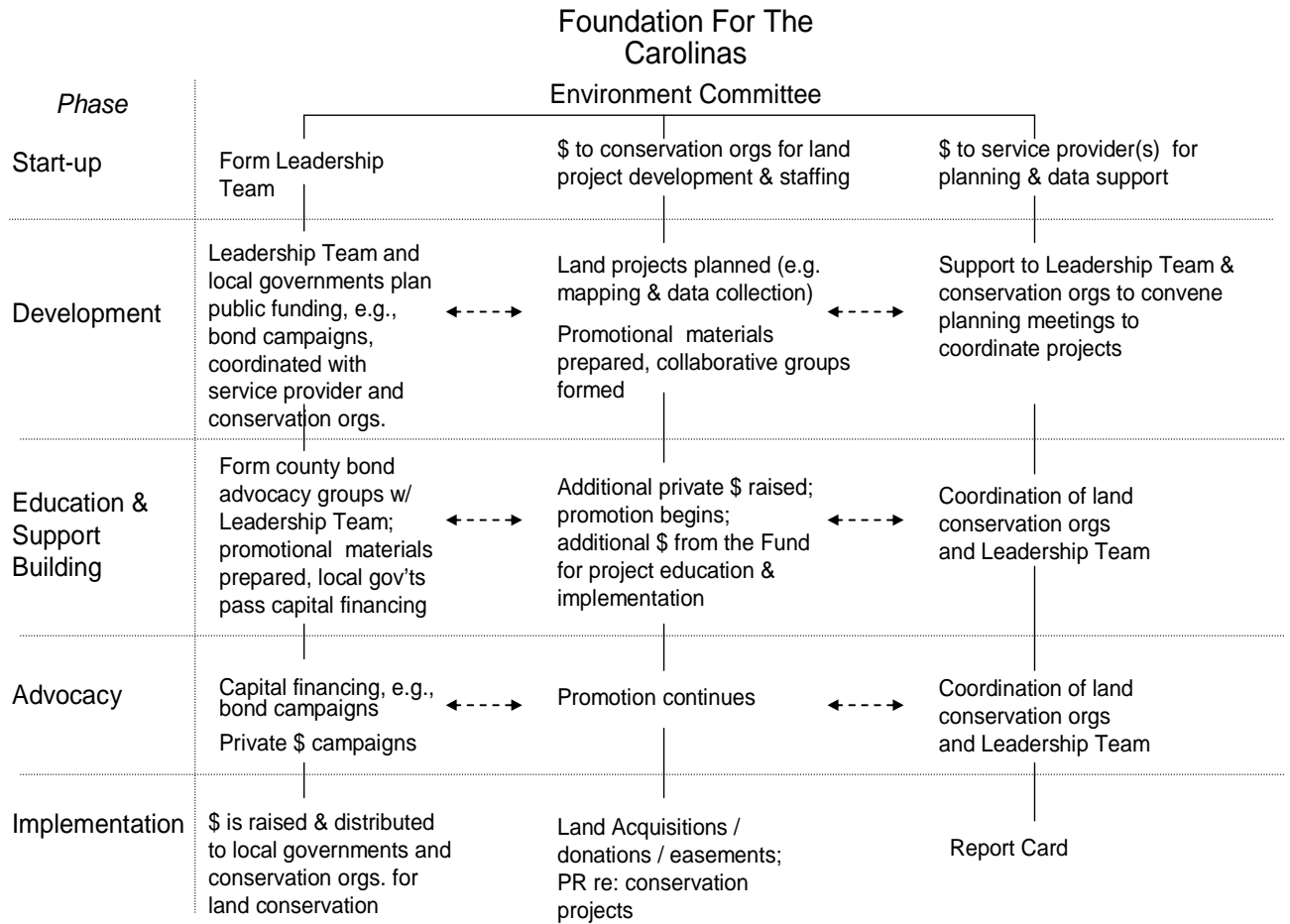
FLOW OF DOLLARS

**MATURE PHASE
– 2006 & BEYOND**



¹ Land or conservation easement acquisition for permanent preservation.

TIME FLOW



VII. Key Decisions for Foundation For The Carolinas

This proposal reflects consensus decision-making by a group with a common goal to design a proposal for review by the Foundation's Environment Committee. The Environment Committee must broaden the scope of the proposal to meet the mission and goals of the Charlotte Mecklenburg Community Foundation Board.

The following issues have been identified for decision by the Environment Committee and Foundation staff.

- a. *Fund structure*: Does the fund meet all legal and fiduciary requirements of the Foundation? What is the role for the Foundation staff and the Environment Committee? What is the role and interface of the proposed Leadership Team?
- b. *Recruitment of the Leadership Team*: What are the criteria for Leadership Team membership? Would members be representing their organizations? Should the Leadership Team include representatives from advocacy and lobbying?
- c. *Geographic boundary*: What is the geography of the Fund – from the upper Catawba; the Foundation service counties; Gaston County?
- d. *Definition*: What is the most appropriate term for the Fund to use – “open space” or “natural areas”?
- e. *Fund name*: Does the name “Carolina Piedmont Land for Tomorrow Fund” reinforce or blur with the State “Land for Tomorrow” initiative?
- f. *Goal statement*: Is the fund most successful with a specific target for land acquisition, for example, number of acres or percentage of land to be conserved? How does this work within the principle of local autonomy by each county?
- g. *Service provider*: What services does the Foundation want from the service provider?

APPENDICES

Appendix A: Timeline

Date / Time	Group	Accomplishments
Tues, Jan. 11, 1:00 – 4:00 pm The Duke Mansion	Full Group	Created working agreements, developed timeline of past open space conservation in the region, drafted definition of open space, and drafted vision statement.
Fri, Feb. 4, 1:00 – 4:00 pm Helms, Mullis & Wicker	Full Group	Agreed on work team to draft action plan, continued work on open space definition and vision, and developed four action scenarios.
Wed, Feb. 9, 3:30 – 5:30 pm The Lee Institute	Small Work Team	Agreed on definition of open space, continued dialogue about vision and mission, developed basic components of model to propose to the Foundation.
Mon, Feb. 14, 4:00 – 6:00 pm The Lee Institute	Small Work Team	Articulated beliefs and values, refined vision and mission, and critiqued model.
Thurs, Feb. 17, 2:00 – 4:00 pm The Lee Institute	Small Work Team	Refined model, and finalized preamble, vision and mission for presentation to full group.
Wed, Feb. 23, 2:00 – 5:00 pm The Duke Mansion	Full Group	Developed shared understanding of preamble, vision, mission, definition, and model, and gathered feedback to integrate into final set of recommendations to the Foundation.

Appendix B: Invitees and Participants

		Participated in at least one of the full group meetings	Participated in at least one of the meetings of the small work team
Tony Almeida	Duke Energy		
Mary Lou Babb	Charlotte Mecklenburg Community Foundation	x	
Bill Barnhardt	Foundation For The Carolinas Environment Committee	x	
McCray Benson	Foundation For The Carolinas		
Steve Blount	Rowan County Commission	x	
Phillip Blumenthal	the Blumenthal Foundation	x	
Frank Bragg	citizen	x	x
Nancy Bryant	Carolinas Clean Air Coalition	x	
Chris Buchanan	Sierra Club	x	
Dave Cable	Catawba Lands Conservancy	x	x
Ken Carter	citizen	x	
Nancy Carter	the Charlotte City Council	x	
Betty Chafin Rash	citizen	x	
Saxby Chaplin	the Trust for Public Land-Charlotte	x	x
Dumont Clarke	the County Commission	x	
Will Close	the Springs Close Foundation		
Jerry Cochran	Lincoln County		
Tom Cox	citizen	x	x
Kristy Davis	Wachovia		
Graham Denton	Bank of America		
Roger Dick	Stanly County		
Bridget Dixon	the Charneck Planning Commission	x	x
Kate Dixon	the Land for Tomorrow Coalition	x	
Lindsay Dunevant	the City of Albemarle - Park and Rec	x	x
Carla DuPuy	Crescent Resources	x	x
Kim Duren	Broad River Greenway	x	
Richard Duren	Gaston County	x	
Mac Everett	Foundation For The Carolinas Environment Committee		
Jill Flynn	Foundation For The Carolinas Environment Committee	x	
Paul Gettys			
Rai Glover	Bank of America	x	
Susie Hamrick-Jones	Foothills Conservancy	x	
Lislott Harberts	Allison Woods Foundation		
Jane Henderson	Wachovia		
Mark Hollis	Duke Energy	x	
Judge Horton	Cabarrus County		
Don Jonas	Foundation For The Carolinas	x	
Tom Lannin	Voices and Choices	x	
Steve Law	Park and Rec-Greenways	x	
Angie Lawry	the Charlotte Regional Partnership		

Jenni LeBlanc	Foundation For The Carolinas	x	
Donna Lisenby	Catawba RiverKeeper	x	x
Jud Little	Crosland	x	
EmmyLou Burchette	Advantage Carolina		
Todd Mansfield	Crosland		
Michael Marsicano	Foundation For The Carolinas	x	
Frank Martin	Landcraft Properties/Sustainable NC		
Angie McCrae	the Springs Close Foundation		
Peter McKay	Foundation For The Carolinas Environment Committee	x	
Bill Medlin	the Yadkin Pee Dee Lakes Project	x	
Jeff Michael	the UNCC Urban Institute	x	x
Pat Mumford	the Charlotte City Council		
Cheryl Myers	Center City Partners		
Peter Pappas	Pappas Properties		
Robert Patterson	Park and Rec Citizen Committee	x	
Susan Patterson	the Knight Foundation	x	
Lindsay Pettus	Katawba Valley Land Trust	x	
Brownie Plaster	Cleveland County	x	
Andrew Plepler	Bank of America		
Jim Puckett	the County Commission		
Dick Ranson	Foundation For The Carolinas Environment Committee	x	
Lisa Renstrom	citizen	x	
Linda Rimer	the EPA		
Jennifer Roberts	the County Commission	x	
Richard Rogers	the Office of Conservation and Community Affairs for NC DENR		
Deb Ryan	the Charlotte Community Design Studio	x	
Ruth Samuelson	citizen	x	
Harold Shapiro	Catawba COG	x	
Al Sharp	Centralina COG	x	
Van Shields	the Culture and Heritage Museums	x	x
Marcia Simon	Foundation For The Carolinas Environment Committee	x	
Katherine Skinner	The Nature Conservancy		
Linda Slade	Gaston County Community Foundation		
Fred Stanback	Rowan County		
Vance Stine	citizen	x	
Mary Tribble	the Forum for Corporate Conscience	x	
Jeff Updike	the Nation Ford Land Trust	x	
Christa Wagner	Sierra Club		
Jason Walser	the Land Trust for Central North Carolina	x	
Oliver Webster	Yadkin Pee Dee Lakes Project	x	
Wayne Weston	Charmek Park and Recreation	x	
Jeff Wise	Charlotte Whitewater Park		
Rick Roti		x	
Doug Youngblood	Partners for Parks	x	



Open Space Implementation Planning – Homework
Summary of Responses
with Feb. 4 Meeting Additions in Bold

Assignment: Within each of the categories below, please indicate what you think needs to happen in order to achieve the Vision for preservation of open space. In other words, what needs to be in place in order for our work to be successful?

I. Identifying Land for Conservation

- Avoid shotgun approach, don't get stuck striving for perfection
- Shared goals
- Priorities – consensus on critical lands to preserve
 - At-risk properties
 - Readily available
 - Cost
 - Location
 - Habitat protection
 - Recreation value
 - Tree canopy
 - Natural heritage
 - Connectivity
 - Farmland
- Wildlife corridors
- View sheds
- Water quality
- Natural areas
- Catawba Regional Trail System
- Power line easements
- Large contiguous parcels
- Prioritize land that meets multiple priorities
 - Analyze & select land by area within the region
 - Timeline
 - Map – visual display – linkages
 - Leverage existing work
 - Open Space Framework (update as needed)
 - York County Forever
 - Counties' greenway & parks plans
 - Land Trusts' priorities
 - Duke re-licensing process
 - Metro Advisory Group
 - Assign/propose roles, e.g.,
 - Urban Institute
 - Land Trusts

II. Leadership

- Regional focus promoting partnerships, broad base of participation, including political, corporate and development arenas
- Could be led by single champion e.g., charismatic leader from business
- Could look to land trusts & regional open space advocates
- Needs to represent broad base including various areas of o.s. interest
- Continuity for the long-term

III. Stakeholders

- Represent a very broad base: Chamber; UNC Charlotte; Parks & Recreation; Real Estate lawyers; County planners; Land Trusts; Elected officials; COGs; FFTC; Homeowners; Youth; Water quality experts; Architects; Farmers; Environmental Justice advocates; minority interests; natural area user groups, e.g., Trout Unlimited
- Reach the unconverted
- Ensure that there are no losers
- Keep process open
- Land trusts – communication, collaboration, execution
- Urban Institute – stakeholder input

Funding

- Big capital – bond referenda
 - After public education
- Federal funds via COGs and municipalities
- Private sector donations and corporate sponsorships as matching funds
- Regional approach to avoid fragmentation
- Funds on smaller scale for:
 - Stewardship of acquired lands
 - Support for data warehouse
 - Campaign to garner public support
 - Land trust staff to go after deals
- Other funding ideas:
 - Legislative set-asides
 - Revolving fund for land acquisition
 - Permanent dedication of rail and utility easements
 - Creation of UW/ASC-like entity as funding mechanism
- Plan for multiple sources, including private funding

Public Support

- Ongoing outreach campaign
 - Focus on public benefit
 - Rapid disappearance of open space
 - Impact on water quality
 - Be seen as pro-growth
 - Present public with clear timetable and deliverables
 - Go to where people are: neighborhood groups, billboards, banners radio
 - Need active support of media – regular articles
 - FFTC as funding source?

- Use Land for Tomorrow research
- Educate, including through schools
- Be strategic in communications – no piecemeal
- Create a sense of urgency

Organizational Capacity to Implement Plan

- Do not reinvent wheel or create a new organization
- Be sure groups not duplicating effort
- Most frequent response:
 - Support land trusts – have infrastructure, need capital, fund staff to implement
- Also mentioned:
 - COGs have expertise to build collaborations, write grants, etc.
 - Committees report to leadership
 - Create rapid response capacity
 - Fund group dedicated to advocacy
 - Voices and Choices has business plan for this
- Encourage state funding
- Need to unite political leaders across counties (V&C could do this)
- Create public campaign to funnel \$ to this one effort so that \$ contributions don't get diluted
- Be data-driven – build in technology so that we can see what we're accomplishing > build in a “green data layer”

Appendix D: Map of the Region

