IV. the pl anning pr ocess



Town Planner Anna Readling reviews comments at the first community meeting at the Bond Park Community Center.

In February 2009, the Town hired Thomason and Associates, a preservation planning firm based in Nashville, Tennessee, as the prime consultant to prepare a town-wide historic preservation master plan. The consulting team also included three sub-consultants: Philip Walker of The Walker Collaborative, Nashville, TN; Mary Ruffin Hanbury of Hanbury Preservation Consulting, Raleigh, NC; and Russ Stephenson, AIA, Raleigh, NC. The consulting team worked under the guidance and direction of Town staff. The Town's project team was made up of staff from the Planning Department and the Parks, Recreation, and Cultural Resources Department.

The Cary Historic Preservation Master Plan is the result of a year-long planning process that began in February 2009 and was accomplished in four over-lapping "activity phases:" Phase I - Data Compilation and Review; Phase II - Public Education and Visioning; Phase III - Plan Development; and Phase IV - Final Drafts and Plan Adoption. The planning process included numerous opportunities for community input. Cary citizens were able to participate in the development of the plan through four community-wide meetings, three educational workshops, and at any other time with comments by phone or email to the Town planning staff and consultants. At each community meeting and workshop, the project consultants made a formal presentation that included a project status report and an overview of progress-to-date. The presentations were followed by discussion periods, and interactive exercises were often used to actively involve meeting attendees and solicit their comments. The public input received during the public meetings and workshops is summarized in Appendix A of this Plan.

The Master Plan also benefited from the participation of a fourteen-member Advisory Committee which met five times during the planning process. The committee was made up of historians, contractors, historic property owners and interested citizens representing diverse sections of the town. The Advisory Committee was instrumental in formulating and articulating the goals, objectives and actions set forth in this Plan.

Public Outreach

The planning process followed a communications plan designed to ensure that as many citizens as possible were informed of the project. The following methods were used to reach citizens and inform them of the community meetings and educational workshops:

Direct Mail

Before each community meeting, postcards were mailed to citizens who own property in the three National Register Historic Districts, and also to citizens who live within a onefourth-mile circumference of the Districts. For community meetings #3 and #4, postcards were also sent to citizens who live in houses built before 1960.

Email Lists

Before each event, informational emails were sent to the Historic Preservation Master Plan Citizens' Advisory Committee, attendees at previous historic preservation community meetings, Town boards and commissions, the Friends of Page-Walker Hotel, the Heart of Cary organization, and to the thousands of Cary citizens who subscribe to the Town's email list.

Flyers/Posters/Take-home Cards

Before the first two community meetings, posters/flyers/takehome cards were placed in community centers and local libraries and at reception desks in Town Hall.

BUD Newsletter

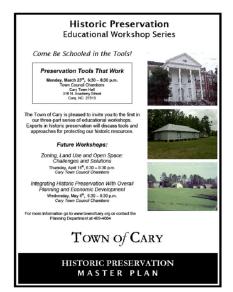
Announcements were placed in the Town's BUD newsletter before each public meeting and workshop. The BUD newsletter is included in every property owner's monthly public utility bill.

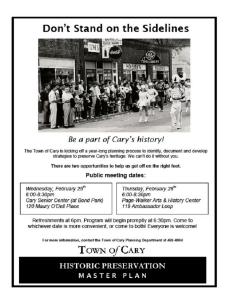
Ads in the Cary News

Before each event, a display ad ran for two consecutive weeks in the Cary News.

Town Web Site/Project Web Pages

Meeting announcements were posted on the Town's home





The workshops and committee meetings were advertised on flyers distributed in the community and on the Town's website.



Advisory Committee members at work at their February 24^{th} meeting.



Consultants outlined the intent of the Historic Preservation Master Plan at the first community meeting on February 25, 2009.

page and on the project web page; a Citizens' Advisory Committee web page posted an agenda before each meeting along with the minutes of the last meeting. In addition, periodic announcements were sent to the media resulting in an article in The Cary News, and several meeting announcements in The Cary News and The News and Observer.

Four Activity Phases

The planning process was accomplished in four overlapping phases of activity. Specific actions during each of the phases are detailed below.

Phase I: Data Compilation and Review

February – May 2009

During this activity phase, the project consultants interviewed various Town staff, reviewed Cary's history and past preservation work, conducted a windshield survey of Cary's portion of the existing Wake County inventory of historic and archaeological resources, and reviewed Town policies, ordinances, and plans for their impact on historic resources.

Phase II: Public Education and Visioning

February – May 2009

The public education and visioning phase took place simultaneously with Phase I and included the following activities:

February 24, 2009 – Citizens' Advisory Committee Meeting #1

At this kick-off meeting, staff introduced the project consultants to the Advisory Committee members. The consultants presented an outline of the planning process and discussed the Advisory Committee's role. This allowed the consultants a chance to become acquainted with the members as well as their interests and background in historic preservation. The Committee, Town staff and consultants then discussed the format for the first two community meetings.

February 25-26, 2009 – Community Meetings #1 and #2

The first two community meetings were held on successive evenings from 6:30 - 8:30 p.m. The first was held on February 25 at the Bond Park Senior Center, and the second was held the next evening on February 26th at the Page-Walker

Arts & History Center. Approximately 25 citizens attended each meeting. Citizens were asked to write answers on large sticky notes to the following three questions:

1. What do you think makes our community special?

2. What types of historic and/or cultural resources do you value most?

3. What would you like this historic preservation plan to accomplish?

The answers were posted on the wall and reviewed in the meeting. After the meeting, the information was tabulated by Town staff for use by the consultants and the Advisory Committee during the plan development phase.

In addition to the community meetings, during this phase of the planning process the consultants also conducted a series of three educational workshops for Cary citizens on specific historic preservation topics. All three workshops were held on weekday evenings (6:30 - 8:30 p.m.) in the Town Council chambers in Town Hall:

March 23, 2009 – Workshop # 1: *Historic Preservation Tools That Work*

This workshop provided an overview of how historic preservation programs are administered at the federal, state, and local level. Topics discussed included the role of the State Historic Preservation Office, and how communities typically create and administer a historic preservation program. The consultants discussed the role of Historic Preservation Commissions as well as commonly used regulatory tools and financial incentives. Approximately 30 citizens attended the workshop.

April 15, 2009 – Workshop # 2: Zoning, Land Use and Open Space – Challenges and Solutions

This workshop focused on issues related to zoning, land use and open space. This topic was selected due to the rapid development of agricultural land and woodlands in Cary in the past several decades and the associated loss of historic structures. The consultants presented a review of planning and zoning concepts, zoning challenges and solutions using case studies, and preservation tools for both urban and rural areas. The consultants also reviewed Cary's past preservation efforts especially those affecting rural resources and open space. Approximately 25 citizens attended the meeting.

May 6, 2009 – Workshop # 3: Integrating Historic Preservation with Local Government and the Economic Benefits of



Citizens discuss the preservation plan project at the February 26, 2009 community meeting at the Page-Walker Arts & History Center.

Historic Preservation

In this workshop the consultants addressed issues of how a historic preservation program is created, what a preservation ordinance contains and the opportunities and constraints of creating a Historic Preservation Commission. The presentation discussed the various roles a Commission can play in the community and its interaction with other governmental agencies. The workshop concluded with an overview of the economic benefits of historic preservation. Approximately 20 citizens attended the meeting.

Phase III: Plan Development

May -- November 2009

During Phase III, the consultants worked with the Citizens' Advisory Committee and Town staff to translate input from the community meetings and workshops into draft Plan goals and objectives:

May 7, 2009 – Citizens' Advisory Committee Meeting #2

The consultants met with the Advisory Committee and summarized the public planning process to date and reviewed all of the comments received at the first two public meetings and the three workshops. After this presentation, the Advisory Committee engaged in a 75-minute exercise to develop a set of draft goals for the Plan. The task of the Committee was to take the 56 separate ideas about preservation that were generated by citizens at the community input meetings. The Committee came up with five groupings; then they generated a goal statement for each group. The final result was five draft plan goals, each heading an associated group of ideas. The consultants then took these goals and associated ideas back to their office and began drafting objectives to meet the five broad goals.

June 16, 2009 – Citizens' Advisory Committee Meeting #3

At this meeting the consultants presented the draft objectives developed to this point to the Advisory Committee. There was extensive discussion concerning the objectives and many more were recommended while others were condensed under the five broad goals. This meeting also began the process of developing specific action items for each objective. At the end of the meeting there was consensus on a draft set of goals and objectives to be presented to the community for their review and input.

The next step in the planning process was for consultants



One of the exercises at the June 17, 2009 community meeting was for citizens to add their comments to proposed goals and actions.

and staff to present the draft Plan goals and objectives to the community for their review and input:

June 17, 2009 - Community Meeting #3

The third community meeting was held at 6:30 p.m. at the

Bond Park Community Center. At this meeting, the consultants reviewed the planning process to this point, and presented the draft goals and objectives. Following the presentation, the attendees adjourned to tables set up with the draft goals and objectives written on large sheets of paper. Attendees were asked to write their comments under the draft goals and objectives, and to add any additional objectives they thought were needed. The last part of the meeting was used to review and discuss the comments. Approximately 30 citizens attended.

July 16, 2009 – Stakeholders' Meeting With the Friends of Page-Walker Hotel Preservation Committee

Consultants and staff met with nine members of the Friends of Page-Walker Hotel Preservation Committee at the Page-Walker Arts and History Center. After discussing the planning process and progress-to-date, the group brainstormed answers to the question: *"What is your primary hoped-for outcome from the Historic Preservation Master Plan?"*

July 21, 2009 - Town Council Work Session #1

The consultants presented an overview of the planning process and then presented the draft Plan goals and objectives along with a few example actions that could be used to implement the objectives and goals. Town Council members asked questions and gave preliminary endorsement to the goals and objectives with the understanding that fully developed implementation actions and plan recommendations would be forthcoming for their review.

July 22, 2009 - Citizens' Advisory Committee Meeting #4

At this meeting, the Advisory Committee worked on developing actions to implement the goals and objectives. The consultants divided committee members into two groups for brainstorming. After 75 minutes of brainstorming, the groups re-convened as one and reported their actions. By the end of the meeting dozens of recommended actions were outlined and agreed upon by the committee.



A slide program detailed the recommended actions at the September 2, 2009 community meeting.

The next steps in the planning process were to present the draft goals, objectives and implementation actions to the community, then to elected and appointed Town leaders:

September 2, 2009 - Community Meeting #4

The final community meeting was held at the Bond Park Community Center and was attended by approximately twenty-nine Cary citizens. At this meeting a fully developed draft of Plan goals, objectives, and recommended actions was presented, followed by a lengthy question and answer session. Attendees received a survey to complete.

September 14, 2009 – Planning & Zoning Board Work Session

At a work session held with the Planning and Zoning Board, the consultants presented the draft Plan goals, objectives, and actions for the Board's review and feedback.

October 14, 2009 – Town Center Review Commission Plan Update

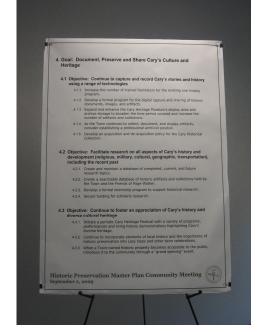
Staff met with the Town Center Review Commission to provide an overview of the planning process and to present the draft plan goals, objectives, and actions for their review and feedback.

October 21, 2009 – Citizens Advisory Committee Meeting #5

The final Advisory Committee meeting was a round-table discussion of the draft Plan's recommended actions, a copy of which members had received earlier for their review. The discussion yielded several suggestions that the consultant used to refine and clarify the actions.

November 10, 2009 - Town Council Work Session #2

The consulting team presented the major actions and recommendations of the draft Historic Preservation Master Plan to Town Council. After a discussion period, Council authorized staff to move forward and prepare a final draft of the Plan for final public comment before beginning the public hearing and adoption process.



At the September 2, 2009 meeting the recommended actions were presented on easels for citizens to review and comment.

Phase IV: Final Drafts and Plan Adoption

November 2009 -- May 2010

From mid-November to mid-January, the project consultants worked with staff to prepare a revised draft of the plan incorporating the comments received from the final community meeting in September, the work session with the Planning and Zoning Board in September, the final Citizens' Advisory Committee meeting in October, and the final work session with Town Council in November.

Final Draft

In January 2010, nearly a year of planning culminated in a complete draft of the Historic Preservation Master Plan, with five goals to serve as the guiding principles for the Town's preservation work program; two to four objectives for each goal to provide direction on how to accomplish the goals; and 71 specific actions to be implemented in order to achieve the objectives:

1. GOAL: ESTABLISH FAIR AND EFFECTIVE PROCESSES AND POLICIES FOR PRES-ERVATION

1.1 Objective: Adhere to an effective administrative and legal framework when implementing historic preservation activities

- 1.1.1. Develop an ordinance for Town Council review and adoption establishing a Cary Historic Preservation Commission; coordinate with the State Historic Preservation Office.
- 1.1.2. Prepare a plan for recruitment, involvement and training of Historic Preservation Commission members; ensure representation of diverse neighborhoods and interests.
- 1.1.3. When a preservation ordinance and Commission are in place, achieve and maintain Certified Local Government status.
- 1.1.4. Upon the establishment of a Historic Preservation Commission, identify and train departments/staff charged with supporting the activities and public processes that fall under the purview of the Commission.

1.2 Objective: Maintain a complete, up-to-date survey of Cary's historic resources

- 1.2.1. Undertake a comprehensive, local survey of historic resources fifty years or older resulting in streamlined and accessible survey data; make recommendations for Study List and National Register eligibility.
- 1.2.2. Using established standards, develop for Town Council review and adoption clear criteria for determining historic significance of structures and other resources.
- 1.2.3. Following the completion of a comprehensive survey, categorize resources determined to be historically significant into levels of priority (designation, protection, purchase, etc.).

1.2.4. Undertake a survey of all subdivisions platted and developed from 1960 to 1970 within the Maynard Loop; identify individual properties that may be of architectural or historical interest.

1.3. Objective: Ensure that historic preservation concerns are considered in all Town actions and ordinances

- 1.3.1. Develop a Town policy for review and adoption that requires that historic resource preservation be considered in future Town planning efforts and in overall approaches to environmental sustainability.
- 1.3.2. Begin conducting annual training for Town staff who must enforce historic preservation ordinances or policies.
- 1.3.3. Hold a meeting every three years with Town Council and the Planning and Zoning Board to review effectiveness of preservation policies and Plan actions.

1.4 Objective: Promote preservation using economic incentives whenever possible

- 1.4.1. Continue to provide assistance to historic property owners wishing to apply for State and/or Federal tax credits.
- 1.4.2. Develop a proposal for Town Council's consideration that outlines and recommends economic incentives such as low/zero interest loans, renovation grants, or fee waivers to owners who agree to certain preservation conditions.
- 1.4.3. Develop a proposal for Town Council's consideration that expands the Town's façade grant program to include historic properties outside of downtown.
- 1.4.4. Prepare a proposal for Town Council's consideration to establish a revolving fund for the purchase, protection, and then re-sale of historic structures.
- 1.4.5. Begin conducting periodic workshops on the Town's façade grant program.

2. GOAL: PRESERVE, PROTECT AND MAINTAIN CARY'S HISTORIC RESOURCES

2.1. Objective: Preserve and protect Cary's historic structures

- 2.1.1. Identify areas meeting qualifications for new or expanded National Register Historic District designations; prepare nomination(s) with owner support.
- 2.1.2. Following the recommendations made in the comprehensive survey, *c*ontact property owners of National Register-eligible properties to explain the process and benefits of designation; pursue designation for properties when there is owner support.
- 2.1.3. Continue to identify properties eligible for local landmark designation; contact property owners; pursue designation for properties with owner support.
- 2.1.4. Begin periodic informational meetings for interested property owners to explain the process and benefits of historic district zoning.

- 2.1.5. Develop for Town Council's consideration alternative zoning and site design standards for the Green Level and Carpenter historic areas to help mitigate threats to historic structures and landscapes.
- 2.1.6. Develop for Town Council's consideration alternative zoning and design standards for the Town Center's historic core to ensure compatible infill and to reinforce traditional design patterns.

2.2. Objective: Preserve and protect cemeteries and archaeological resources

- 2.2.1. Develop and maintain an inventory of cemeteries and known archaeological sites.
- 2.2.2. Develop for Town Council's consideration an ordinance requiring a phase I archaeological survey for new development projects involving site disturbance.
- 2.2.3. Develop a public education program to educate citizens and hobbyists about site preservation and the importance of archaeological context.

2.3. Objective: Encourage adaptive re-use of historic structures

- 2.3.1. Develop a delay-of-demolition ordinance for Town Council review and adoption that applies to significant historic structures outside of local historic districts.
- 2.3.2. Seek State enabling legislation to allow "demolition-by-neglect" regulation of historically significant structures located outside of local historic districts.
- 2.3.3.Acquire and promote materials to educate landowners and developers about the use 3.1.3. of the available North Carolina Rehabilitation Code.
- 2.3.4. Begin sponsoring periodic public workshops on historic building repair and maintenance.

2.4. Objective: Effectively steward Town-owned historic resources

- 2.4.1. Develop and a policy for review and adoption by which the Town, prior to its purchase of properties with potential historic significance, completes an assessment to determine the historic and archaeological value of the site and its existing structures.
- 2.4.2. Begin preparing preservation and stewardship plans for each historic resource (structural and non-structural) owned by the Town; continue as resources are acquired.
- 2.4.3. Develop an interpretive plan that incorporates educational goals and addresses public access for each Town-owned historic site/property.
- 2.4.4. Develop a process by which proposed changes to, demolition, or moving of historically significant Town-owned properties be reviewed first by a historic preservation commission.

3. GOAL: PRESERVE HISTORIC CONTEXT

3.1. Objective: Protect existing development patterns that contribute to historic areas

- 3.1.1. Initiate periodic meetings with downtown property owners, including churches and schools, to discuss their future expansion plans and their potential impact on historic resources.
- 3.1.2. Establish standards for determining when moving a historically significant structure is an appropriate preservation solution.
- 3.1.3. Develop application criteria and a review process for neighborhoods interested in pursuing a neighborhood conservation overlay district; hold periodic informational meetings with interested neighborhoods.

3.2. Objective: Preserve and protect historic viewsheds, rural and designed landscapes, and associated historic resources

- 3.2.1. Develop requirements for the protection and ownership of historic structures that are preserved during the rezoning/site development process.
- 3.2.2. Based on the results of a comprehensive historic resources survey, expand the applicability of historic preservation incentives in the Conservation Residential Overlay District (Southwest Area Plan) to historic structures outside of the Green Level National Register Historic District.
- 3.2.3. Continue to seek state, federal, and private grant opportunities to acquire historic landscapes and/or easements that protect historic landscapes and views.
- 3.2.4. Prepare a historic preservation bond referendum proposal for consideration by Council to fund the purchase and preservation of historic structures and historic rural landscapes.
- 3.2.5. Develop a process by which preservation interests are routinely considered during planning for roadway improvements.
- 3.2.6. Review current buffer standards in the Land Development Ordinance and assess the need for increased buffering of uses adjacent to historic structures/areas outside of the town center.

4. GOAL: RAISE AWARENESS OF HISTORIC PRESERVATION

4.1. Objective: Increase the visibility and accessibility of historic resources and preservation information

- 4.1.1. Develop and maintain a historic preservation web page; periodically explore new internet technologies to promote preservation.
- 4.1.2. Establish and maintain a program to distribute materials about Cary's preservation program and historic areas to local hotels, restaurants, antique shops, and other merchants.
- 4.1.3. Publish a paper inventory of Cary's historic properties following the completion of a comprehensive survey.
- 4.1.4. Continue to celebrate National Historic Preservation Month with special events.

4.1.5. Develop and maintain a Historic Preservation Resource Library that is accessible to the public.

4.2. Objective: Educate the community about Cary's history

- 4.2.1. Continue to update history-based curriculum materials and distribute to area schools to further student appreciation of local history.
- 4.2.2. Continue to offer hands-on educational tours of the Page-Walker Arts and History Center and of the Cary Heritage Museum to area schools.
- 4.2.3. Develop educational tours of other Town-owned historic properties as they become accessible.
- 4.2.4. Continue to offer periodic historic preservation-themed public education programming in collaboration with the Friends of the Page-Walker Hotel.
- 4.2.5. Continue to offer a downtown walking tour which emphasizes historical and architectural significance of historic downtown structures.
- 4.2.6. Develop, with citizen input, additional walking or driving tours of historic neighborhoods throughout Cary.

4.3. Objective: Promote understanding of the environmental and economic value of historic preservation

- 4.3.1. Begin producing an annual report for preservation in Cary
- 4.3.2. Create a speaker's bureau for presenting historic preservation information to local community groups and organizations.
- 4.3.3. Begin sponsoring periodic workshops on the use of federal and state historic tax credits for owners of historic properties, developers, real estate professionals, and others in coordination with the State Historic Preservation Office.

4.4. Objective: Promote a sense of pride among owners of historic properties

- 4.4.1. Expand house marker programs throughout historic areas such as downtown, Carpenter and Green Level, as well as individual resources.
- 4.4.2. Periodically post a feature article on a local historic property and its owner on a Town Historic Preservation web page.
- 4.4.3. Establish an annual awards program to recognize those who have rehabilitated historic buildings in the past year.
- 4.4.4. Continue to provide guidance to historic home owners in obtaining chain-of-title research, ownership history, biographical data, etc.
- 4.4.5. When a comprehensive historic/architectural survey is completed or updated, distribute copies to owners whose property is included in the survey.

5. GOAL: DOCUMENT, PRESERVE AND SHARE CARY'S CULTURE & HERITAGE

5.1. Objective: Continue to capture and record Cary's stories and history using a range of technologies

- 5.1.1. Increase the number of trained facilitators for the existing oral history program.
- 5.1.2. Develop a formal program for the digital capture and sharing of historic documents, images, and artifacts.
- 5.1.3. Expand and enhance the Cary Heritage Museum to broaden the time period covered and increase the number of artifacts and collections displayed.
- 5.1.4. As the Town continues to collect, document, and display artifacts, develop strategies for storing and managing the archives, including the development of a searchable database of collections and artifacts.
- 5.1.5. Develop an acquisition and de-acquisition policy for the Cary Historical Collection.

5.2. Objective: Facilitate research on all aspects of Cary's history and development (religious, military, cultural, geographic, transportation), including the recent past

- 5.2.1. Create and maintain a database of completed, current, and future research on historical topics.
- 5.2.2. Develop a formal internship program to support historical research documentation.
- 5.2.3. Secure funding for scholarly research on historic topics.

5.3. Objective: Continue to foster an appreciation of Cary's history and diverse cultural heritage

- 5.3.1. Initiate a periodic Cary Heritage Festival with a variety of programs, performances and living history demonstrations highlighting Cary's diverse heritage.
- 5.3.2. Continue to incorporate elements of local history and the importance of historic preservation into Lazy Daze and other town celebrations.

Citizen Survey

The draft of the Historic Preservation Master Plan, along with a citizen survey, was posted on the internet during the month of February 2010. A notice about the survey was included in the February BUD newsletter that went to all residences in Cary. The survey was also advertised with a public service announcement, in the Cary News, on the Town website, and through the project email list.

There were 62 respondents to the survey:

- 50% have lived in Cary more than 10 years.
- 15% didn't live inside Cary's town limits.
- 40% of the respondents had attended at least one community meeting or workshop held last year.
- 25% live in homes built before 1970; 66% live in homes built since 1970.

Sixteen questions gauged the level of support for historic preservation and the major plan recommen-

dations. The level of support was greater than 60% for all the questions, with the lowest level of support (63%) being for the idea of creating a demolition-by-neglect ordinance. The highest level of support was for the question: How important is it for a community to preserve its historic character, including buildings? Eighty-nine percent responded that it was important.

The average response for all questions was:

- 73% supportive
- 14% neutral
- 13% unsupportive

More detail and a summary of responses from all of the survey questions are included in Appendix A to this document.

Final Plan Review and Adoption

Responses from the survey were compiled and presented along with the draft Plan to Town Council and the public at a public hearing on March 23, 2010. In April 2010, staff presented the draft plan to the Town's Parks, Recreation and Cultural Resources Advisory Board and to the Town Center Advisory Commission for their review and recommendation to Town Council. Both the Board and the Commission recommended adoption. On April 19, 2010, a second public hearing was held at a meeting of the Town's Planning and Zoning Board. The Board voted 8 to 1 in favor of adoption and forwarded their recommendation back to the Town Council. On May 27, 2010, the Town Council unanimously adopted the Historic Preservation Master Plan as volume VIII of the Town's Comprehensive Plan.

Conclusion

The planning process – from project kick-off to final adoption -- lasted fifteen months. A major focus of the planning process was public outreach and education. The plan benefited greatly from the public's input. In fact, the plan's goals, objectives, and actions were developed directly from input received from the public.

In summary, the plan development process included four community-wide meetings; three public educational workshops; five meetings with a Citizens' Advisory Committee; two work sessions with Town Council; one work session with the Planning and Zoning Board; and one information session with the Town Center Review Commission.

After a complete draft of the Plan was developed, citizens were invited to review and comment on the draft Plan through a public survey that was posted on the internet for a month and available as a hard copy upon request. The draft Plan was also reviewed by two standing citizen advisory boards – the Parks, Recreation and Cultural Resources Advisory Board and the Town Center Review Commission. Finally, the Plan was reviewed and presented for public comment at two public hearings before being adopted by Town Council.

The next chapter provides discussion about and recommendations for the implementation of each proposed Plan action.