

## Section 6

# Action Implementation Plan

### 6.1 INTRODUCTION

This section describes how the City of Shelby can implement a safe, convenient, and usable park and recreation system through the execution of its established goals in the Comprehensive Parks Master Plan. The strategy for achieving goals involves the recommended park, recreation and greenway facilities/programs discussed in Section 5. Section 6 deals with strategies and opportunities, key implementation steps (implementation policies), necessary staffing and methods for developing facilities. Together, these sections form the implementation program.

The results of the City of Shelby Parks and Recreation Comprehensive Master Plan 2008-2018 are based on the following discovery methods: (1) a review of the study area that is within the City limits, (2) an analysis of the existing parks and facilities; (3) community input; and (4) recreation standards that have been generically developed for municipalities and county governments. The Master Plan is designed to be action-oriented and serve as a tool in the improvement and enhancement of the park system for the City of Shelby.

*Identification of sufficient funding* is a crucial element that is required to implement the Master Plan, considering in particular, the City's budget constraints. The North Carolina Statewide Comprehensive Outdoor Recreation Plan is a guide by which inadequate funding for park and recreation facilities may be identified. *Insufficient funding* will be a key issue that will need to be addressed in the upcoming years if governments continue to provide basic minimum services. According to the U.S. Census Bureau, North Carolina and its local governments are 33% below the national average in the funding of parks and recreation services.

To meet the existing and future needs of the City of Shelby Parks and Recreation Department, the goals and objectives that are identified in the Master Plan, must be seriously considered for implementation. The City will need to continue to establish annual budgets for the Parks and Recreation Department based on projected capital improvement costs, staffing needs and operations/maintenance costs. The following Capital Improvements Plan is for the first 10-year period, 2008-2018, of the Master Plan recommendations and is broken into each fiscal year for implementation of specific projects.





## Park and Recreation Capital Expenditures

The population estimates used in this report were certified county and municipal estimates in July, 2005. The estimates were calculated by the State Demographer, Office of State Budget and Management and North Carolina Office of the Governor. The figures were provided online at <http://demog.state.nc.us>. The per capita expenditure figures are from the *North Carolina Municipal and County Parks and Recreation Services Study, Fiscal Year 2006-2007*.

The following government entities represent North Carolina municipalities with populations between 18,000 and 23,000 people. The City of Shelby is in the middle of that range of populations.

**Table 6.1.1**

Municipalities with populations of around 20,000	Population Estimate 2005	Per Capita Expenditure 2004-2005
Lenoir	18,588	128.55
Carrboro	18,611	102.83
Lexington	20,927	90.44
Shelby	20,863	86.19
Elizabeth City	19,449	55.07
Kinston-Lenoir	22,952	49.53
Lumberton	22,800	45.98

The following government entities represent North Carolina Counties with populations similar to that of Cleveland County.

**Table 6.1.2**

Counties with populations of 80,000 to 100,000	Population Estimate 2005	Per Capita Expenditure 2004-2005
Brunswick County	94,964	27.14
Craven County	95,558	7.05
Burke County	88,663	5.31
Moore County	82,292	7.58
Nash County	92,220	1.58
Cleveland County	96,714	*0.51

\*This figure is based upon the 2007-2008 Cleveland County Operating Budget.



To meet the existing and future needs of the City of Shelby Parks and Recreation Department, the goals and objectives, which are identified in the Master Plan, must be seriously considered for implementation. The City will need to continue to establish annual budgets for the Parks and Recreation Department based on projected capital improvement costs, staffing needs and operations/maintenance costs. The operating budget should include costs for staff, operations and general maintenance requirements similar to those being performed by the Parks and Recreation Department.

## 6.2 ECONOMIC DEVELOPMENT INITIATIVE

Studies have shown that economies are impacted *very positively* where bicycle and pedestrian tourism is fostered and promoted and where investments are made in bicycle and pedestrian facilities. The number of people who feel comfortable walking or riding bicycles is a measure of the quality of life in that area.

### Trails and Greenways

Trails and greenways are extremely popular amenities for vacationing bicyclists and pedestrians. Tourists and visitors to the area often return to communities that provide places (which are safely removed from busy roads) for walking and bicycling. Trails offer scenic recreation, which is suitable for a wide range of ages and abilities. Many times, lodging is in close proximity to popular trails, thereby increasing occupancy for the owner. For residents in these locales, investments in trails and greenways can increase property values and improve the overall livability of a community, as well as attracting, retaining, and expanding tourism and the associated revenues.

Investing dollars in greenways yield substantial community-wide returns. These returns are in the form of increased property values, business attraction, recreation revenue, and reduced water treatment and flooding costs. Not only are tourists attracted to these areas, but business leaders are selecting sites for the relocation and expansion of industries and corporations where the quality of life is high and recreation opportunities are abundant. Increasingly, corporations are recognizing the benefits of convenient fitness and recreation for their employees and are seeking these greenway amenities for potential locations.

Greenways, as vegetated buffers located adjacent to waterways, act as “filters” to clean the water, trapping nonpoint source pollutants. These pollutants which include sediment, pesticides, fertilizers, oil, gas and other chemicals, are transported into streams, rivers, and/or lakes by stormwater when rain or snow events occur.

Greenways, therefore, can reduce the need for expensive pre-treatment of the water supply by cleaning it before it reaches residents.



## **Trail Development**

The ongoing construction of bicycle and pedestrian facilities is proving to be a very wise economic investment for the communities through which they pass. Trails and pathways have a positive effect on nearby property values with homebuyers and business owners realizing the effect that such facilities bring to a community. According to research by the *Rails to Trails Conservancy*, there are vast amounts of people, who are using rail trails. It is easy to understand how communities can profit economically by meeting the needs of trail users: restaurants, convenience stores, bicycle and other merchandise shops, campgrounds and alternate lodging. All of these types of entrepreneurs attribute the location of a nearby trail to at least a portion of their success. Realtors and homebuyers alike are recognizing the benefits of properties located near trails. Both locally and nationally, the construction of trails have proven to be a cost effective use of public funds. In particular, multi-use trails allow more visitors and residents to replace automobile trips with non-motorized trips, thereby moving the citizenry closer to achieving public health objectives, including increased opportunities for physical exercise.

## **Parks**

Research has substantiated the direct proportion between economic growth and the existence of parks and open space in communities and municipalities around the country. This growth includes increased property values in residential, urban, and industrial communities, as well as the increased revenue from tourists.

## **Increased Property Value**

The real estate market consistently demonstrates that residents throughout the country are willing to invest larger amounts of money in properties that are located close to parks and open space areas than they would for homes that do not offer these types of amenities. The higher values of these homes produce higher property taxes in the affected area. In some instances, additional property taxes are sufficient to recoup the annual debt charges on bonds, which were originally used to finance park acquisition and development.

Studies have also concluded that the positive relationship between park proximity and property value also holds true in low-income urban areas. In dense, urban neighborhoods, the value effect of nearby green space can be stronger than the resident's lot value, increasing the lot value and again, yielding higher property taxes, to, perhaps fund the cost of the park.

The values of commercial properties also increase when parks or outdoor facilities (such as outdoor festivals, movies, restaurants, etc.) are in the immediate locale. Studies



indicate that “commercial asking rents” near park property exceed rents in surrounding submarkets.

### **Revitalization of Businesses and Residents**

In recent years, there has been a trend to revitalize inner-city and urban areas to improve their quality of life. The success of this revitalization has included the addition of parks and recreational activity in downtown areas. Generally speaking, people do not want to live or work in an environment where they have no refuge from downtown city buildings, without having any place to go out for a stroll, walk the dog, or just enjoy some sunshine. In studies of downtown revitalizations, the top recommendations include “the dramatic expansion of parks and open spaces”.

### **Tourism**

A park often becomes the signature attraction for a community or municipality. It is often used as a marketing tool to attract residents, tourists, conventions, and businesses. Parks often shape the identity of the area and give residents a sense of pride.

Organized events held in public parks; arts festivals, athletic events, food festivals, concerts, plays, et cetera, often bring substantial positive economic impacts to their communities by filling hotel rooms and restaurants, and bringing customers to other local business enterprises.

## **6.3 OPPORTUNITIES AND STRATEGIES**

### **Dedicated Source of Local Funding**

In order to leverage and provide matching funds for many of the programs listed above, the City of Shelby should evaluate the existing departmental budget and funding for capital improvements to include the following:

- Property/sales tax
- Bonds
- Fee in-lieu of contributions
- User fees/registration fees



## **Property/Sales Tax Revenues**

General tax revenues traditionally provide sources for general operations and maintenance of park systems for local governments. The Parks and Recreation Department is scheduled along with health, public safety, utilities, et cetera. in regular budgets established by the City. Assessed valuation of real and personal property tax and sales tax provides the framework for the major portion of the tax base for the City.

Traditionally ad valorem tax revenue has been the primary source of funding for the park and recreation enhancement of properties/facilities owned by local governments, 'Recreational opportunities' are considered a public service and often are a standard line item on general fund budgets. Creative financial opportunities are possible; however, ad valorem taxes will continue to be the major revenue source to support the system. As such, communities often vote to raise their local tax rate temporarily in support of their park and recreation systems.

## **General Obligation Bonds**

Many communities issue bonds that are typically approved by the shareholders, to finance site development and land acquisition costs. The State of North Carolina grants local governments the authority to borrow funds for parks and recreation through the issuance of bonds. The amount is not to exceed the cost of acquisition or improvement of park and recreation facilities. Total bond capacities for local governments are limited for parks and recreation, to a maximum percentage of assessed property valuation. Since the issuance of bonds relies on the support of the voting population, the implementation of awareness programs is absolutely essential prior to a referendum vote.

General Obligation bonds are the preferred financing approach of the North Carolina Local Government Commission and the general securities market, because these instruments are backed by the full faith and credit of the issuer. That simply means that the bonds represent an encumbrance against the property tax base of the issuing jurisdiction and therefore offer the best available security to the bond holder. The State of North Carolina gives the issuance of bonds not to exceed the total cost of improvements (including land acquisition). In view of the recommended capital improvements suggested in this plan, borrowing of funds to develop new facilities may be necessary. Total bonding capacities for local government is limited for parks and recreation to a maximum percentage of assessed property valuation.



The following are key factors to consider before using this financing instrument:

- In North Carolina, the issuance of General Obligation bonds requires a referendum of the voters within the issuing jurisdiction.
- The term of the debt may be extended to 20-30 years.
- The debt is publicly sold, so there are costs associated with the sale. These costs generally total 3% to 5% of the total bond principal. The issuance costs offset the lower interest rate and therefore, this instrument becomes more attractive as the size of the issuance increases and the issuance costs are spread over the larger debt. It has been found that this financing option becomes financially superior as the debt principal exceeds \$10-\$12 million.
- Generally, prepayment of the debt cannot be accomplished until reaching a call date. This usually is around 75% of debt retirement.

Failure of the General Obligation Bond to be ratified by referendum could mean that the County could not go forward with an alternative approach to financing without substantially changing the scope of the project

### **Fee in-lieu of contributions**

Under the Unified Development Ordinance (UDO), developers would have an option to pay a 'fee in lieu of' rather than to dedicate land for open space or recreation within conventional subdivisions. This program has proven to be successful for many local governments in providing a dedicated source of revenue, earmarked for park development. The City may choose to revisit this source of revenue to study the feasibility of enhancing the fee in-lieu formula.

### **User fees/registration fees**

Communities throughout the nation employ a wide variety of user fees for public use of recreational programs and services within their recreation departments. The amount of the fee is usually determined by a portion of the recreation costs needed for improvements and operations. These user fees are typically levied for special facilities such as water parks and golf courses; however, they can also be charged for the use of trails and ball fields. The City of Shelby should continue to generate revenue by charging user fees for use of facilities such as picnic shelters and the golf course in order to cover operation and administrative costs. As the park system continues develop, the City should examine their fee structure to identify opportunities for additional revenue. The current user fees appear to be fair and reasonable for a majority of the City residents. Elected officials should



determine the fees and charges; the fees should not be so high that persons of modest income would ultimately be denied the use of park facilities.

## **Other Sources Of Local Funding**

### **Tournament Based Recreation**

The demand for recreational facilities that are capable of hosting large visiting sports tournaments is prevalent across the state. Tournament-quality sports complexes not only emphasize the vital role sports play in our everyday lives but also generate revenue through the hosting of local youth, adult and senior competitions and by providing a venue for regional, state and national sports league tournaments. Sports complexes also highlight the quality of life in a community and serve to attract visitors and prospective residents. Sports complexes accomplish this by supporting the development of local athletics, tournament events, sports leagues and organizations.

A tangible benefit that sports complexes bring to their community is the generation of revenue from the hosting of tournaments. The local park and recreation department benefits financially from the rental of the facility, admission fees, parking and concession fees. The local retail community benefits financially from the influx of visitors spending money at retail establishments, hotels and restaurants. Indirect economic impact on the community comes in the form of additional tax revenue from sales taxes.

The main goal of any sports complex is to maximize the economic benefits of sports for the betterment of the entire local community. By increasing the number of people exposed to the host community's visitor amenities (i.e. restaurants, hotels, gas stations, etc.) these businesses gain increased opportunities to earn profit. The increased tourism generated by the sports complex may also improve visitor exposure to other local area attractions. Sports complexes capable of hosting events that span a wide spectrum of sports and performance levels can maintain their economic impact potential by creating seasonal sports tourism for the community throughout the year.

Sports complexes provide jobs in the form of public sector operations and maintenance staff. Operation of the facility can produce economic growth and private sector development and generate better statewide and regional exposure for the community.

The Rocky Mount Sports Complex is one example of how such a facility can produce a significant economic impact. This complex consists of a number of amenities including a championship baseball field, four softball/multi-purpose fields, and six youth ball fields with adjustable bases from 60'-70', two regulation basketball courts, ample lighting, and parking for 600 vehicles, restrooms and concession areas.



According to the Rocky Mount, North Carolina 2006-2007 Rocky Mount Sports Complex Economic Impact Report for March 15<sup>th</sup> to July 1<sup>st</sup>, there was an overall economic impact of \$2,242,000.00 from tournament events. These numbers reflect a total number of 12 tournament weekends with 220 total teams participating with an average attendance of 510 patrons per day. The dollar amount was based on \$40 a day spent for the average day tripper and \$100 a day spent by the average over-night visitor (Averages from Raleigh Sports Data, Greater Raleigh Sports Council 2007).

According to the Executive Director of the Statesville Convention and Visitors Bureau, the Statesville Soccer Complex recently hosted their Fall Classic soccer tournament. For that single event there were a total of 65 teams, 55 of these teams were from out of town. The majority of the out of town visitors reserved approximately 1284 area hotel rooms. The economic impact for this event was estimated to be \$786,324.

Following its opening in 2006, the Catawba Meadows Park played host to a 93 team, regional little league baseball tournament. With five little league ball fields and four softball/baseball fields this complex has already won a state economic development award and helped Morganton become one of the state's largest tourism regions.

Recently, Morganton's Catawba Meadows Park hosted four larger scale youth tournaments. According to the 2006 Greater Hickory Recreation/Tourism Plan (a Western Piedmont Council of Governments and the Unifour Recreation and Open Space Task Force report), the four tournaments generated about \$1.3 million in total economic activity. This amount is based on 60 teams with an average of 15 participants per team and 1.5 family members per team member. These tournaments occurred between March and July and were organized by a number of different organizations including BPA Baseball, AFA Fast-pitch Softball, USSSA Baseball and Triple Crown Baseball.

Ball sports are not the only events that create the opportunity for hosting financially beneficial tournaments. Swimming tournaments have the potential to create a positive economic impact. The Shelby Park Pool hosted four main events in 2007. These included The Shelby Invitational, Junior Olympic Qualifier, The Sprint Triathlon, and the Tuesday Night Swim Meets. The financial impact to Shelby from these events totals just over \$400,000.00. The tournament creating the largest single portion of the total economic impact was the Junior Olympic Qualifier. The Sharks Aquatic Club along with local sponsorships bore the cost of this meet which created a total estimated economic impact to Shelby of \$220,308.00. This number includes the sum total for local and distant entrants for lodging, meals and miscellaneous (entertainment) expenses.

The involvement of host clubs and organizations with regards to implementing and managing sports tournaments is crucial for the success of any sports complex.



These groups can be regional, statewide, national or even international and thus, could be an inexhaustible resource for encouraging sports tourists to visit any given sports complex.

According to TIA, Travel Industry Association, sports events-related travel has increased significantly in America. In 2007, TIA reports that "...in the last five years, 75.3 million U.S. adults attended an organized sports event, competition or tournament as either a spectator or as a participant while on a trip of 50 miles or more, one-way, or away from home." TIA also reports that a quarter of all sports events travelers attended events to watch their children or grandchildren play. Becoming part of this sports tourism market is possible by providing the sports tournament infrastructure necessary to attract this market. Therefore, having a successful sports complex can mean providing economic growth while attracting visitors and prospective residents to the community.

## 6.4 FUNDING/ACQUISITION SOURCES

Implementing the recommendations of this Comprehensive Parks Master Plan will require a combination of funding sources that include local, state, federal and private money. This Section provides a listing of the most commonly used funds for park and greenway facility projects in North Carolina. Fortunately, the benefits of protected greenways and parks are many and varied. This allows programs in The City of Shelby to access money earmarked for a variety of purposes including water quality, hazard mitigation, recreation, air quality, alternative transportation, wildlife protection, community health and economic development. Competition is always stiff for state and federal funds. It becomes imperative that local governments work together to create multi-jurisdictional partnerships and to develop their own local sources of funding. These sources can then be used to leverage outside assistance. The long term success of this plan will almost certainly depend on the dedication of local revenue stream for park and greenway projects.

It is important that the City of Shelby fully evaluate its available options and develop a funding strategy that can meet community needs, maximize local resources, improve quality of life and leverage outside funding. Financing will be needed to administer the continued planning and implementation process, acquire parcels or easements and manage and maintain facilities. Further research into these programs is recommended to determine requirements for specific grants.

McGill Associates advises the City of Shelby to pursue a variety of funding options. Below is a list of park and greenway funding opportunities that are typically sought by communities.



Creative planning and consistent monitoring of funding options will likely turn up new opportunities not listed here.

## **Grants**

State and federal agencies offer numerous grants to assist municipalities in the financing of their parks and recreation projects. This source of funding should definitely be investigated and pursued by the City of Shelby for present and future park and recreation improvements.

### **North Carolina Parks and Recreation Trust Fund (PARTF):**

PARTF was established for local governments and the North Carolina Division of Parks and Recreation in 1994 as a funding source for the development and/or improvement of parks and recreation facilities, and for the purpose of land acquisition. A state-funded program, PARTF matches monies spent by municipalities on parks and recreation, with each sharing 50% of the cost. In 2004, the fund request was elevated from a maximum of \$500,000 to \$1,000,000. The Recreational Resources Service should be contact for additional information at (919) 515-7118.

### **Land and Water Conservation Fund (LWCF):**

A federally-funded program, LWCF was established for local and state governments in 1965 as a funding source for outdoor recreational development and land acquisition. LWCF monies are derived from the sale or lease of nonrenewable resources, primarily offshore oil and gas leases, and surplus federal land sales. Acquisition and development grants may be used for a wide variety of outdoor projects such as city parks, tennis courts, bike trails, outdoor swimming pools and support facilities (roads, water supply, et cetera.) Facility design must be rather basic rather than elaborate and must remain accessible to the general public. No more than 50% of the project cost may be federally funded by LWCF, although all or part of the project sponsor's matching share may be obtained from certain other federal assistance programs. The federal government has proposed no funding for this program for fiscal year 2006.

### **North Carolina Natural Heritage Trust Fund**

The North Carolina Natural Heritage Trust Fund (NHTF) fund provides supplemental funding to select state agencies for the acquisition and protection of important natural areas, to preserve the state's ecological diversity and cultural heritage and to inventory the natural heritage resources of the state. Eligible agencies include the Dept. of Environment and Natural Resources, the Wildlife Resources



Commission, the Dept. of Cultural Resources and the Dept. of Agriculture and Consumer Services. Although the City of Shelby cannot be the applicant, there are state agencies, which could acquire properties, institute programs, et cetera in the City for preservation or education purposes. Grants are awarded for the following:

- The purchase of lands that represent the state's ecological diversity to ensure their preservation and conversation for recreational, scientific, educational, cultural and aesthetic purposes.
- The purchase of additions to state parks, state trails, aesthetic forests, wild or scenic rivers and fish/wildlife management areas.
- The development of a balanced state program of historic properties.
- The inventory and conservation planning of natural areas by the Natural Heritage program.

### **Federal Aid Construction Funds**

These funds are included in the National Highway System (NHS) Surface Transportation Program (STP), and Congestion Mitigation and Air Quality (CMAW). The funds provide for the construction of pedestrian and bicycle transportation facilities. The primary source of funding for bicycle and pedestrian projects is STP Enhancement Funding.

### **Safe Routes to School Program (SRTS)**

The Safe Routes to Schools Program is a Federal-Aid program of the U.S. Department of Transportation's Federal Highway Administration (FHWA). The Program was created by Section 1404 of the *Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users Act* (SAFETEA-LU). The SRTS Program is funded at \$612 million over five Federal fiscal years (FY 2005-2009) and is to be administered by State Departments of Transportation (DOT's).

The Program provides funds to the States to substantially improve the ability of primary and middle school students to walk and bicycle to school safely. The purposes of the program are:

1. To enable and encourage children, including those with disabilities, to walk and bicycle to school.

2. To make bicycling and walking to school a safer and more appealing transportation alternative, thereby encouraging a healthy and active lifestyle from an early age.
3. To facilitate the planning, development and implementation of projects and activities that will improve safety and reduce traffic, fuel consumption and air pollution in the vicinity (approximately 2 miles) of primary and middle schools (Grades K-8).

### **North Carolina Ecosystem Enhancement Program**

The N.C. Ecosystem Enhancement Program (EEP) combines a wetlands-restoration initiative by the N.C. Dept. of Environment and Natural Resources with ongoing environmental efforts by the Dept. of Transportation to restore, enhance and protect its wetlands and waterways. EEP provides:

- High-quality, cost-effective projects for watershed improvement and protection
- Compensation for unavoidable environmental impacts associated with transportation, infrastructure and economic development
- Detailed watershed-planning and project-implementation efforts within North Carolina's threatened or degraded watersheds

### **The Safe, Accountable, Flexible, Efficient, Transportation Equity Act of 2004 (SAFETEA).**

The Safe, Accountable, Flexible, Efficient, Transportation Equity Act of 2004 (SAFETEA), approved by the federal government in 2004, is a primary source for financing bicycle, pedestrian, and greenway projects throughout the country, at both the local and state levels. Providing as much as 80% for development and construction costs, this grant is earmarked for facilities such as sidewalks, rail-trails, bike-lanes and greenways. The Enhancement Program (a section of SAFETEA) is used primarily by municipalities since this section focuses on bicycle and pedestrian corridors, environmental mitigation, historic preservation and scenic byways. 20% matching funds are required by the applying entity and applicants must meet several other criteria as well. Prior to applying for this grant, a through engineering assessment should be performed to determine construction costs.



## **Recreation Trails Program**

The Recreation Trails Program (RTP) is an assistance program of the Department of Transportation's Federal Highway Administration (FHWA). RTP makes recreation funds available for state allocation to develop and maintain recreation trails and trail-related facilities for both non-motorized and motorized recreation trail users. RTP funds are distributed to states by

a legislative formula: half of the funds are distributed equally among all states and half are distributed in proportion to the estimated amount of non-highway recreational fuel used in each state. (Non-highway recreational fuel is the type which is typically used by snowmobiles, all-terrain vehicles, off-road motorcycles and off-road light trucks.)

## **Clean Water Management Trust Fund (CWMTF)**

Created in 1996 by the North Carolina General Assembly, the Clean Water Management Trust Fund (CWMTF) grants monies to local governments, state agencies and not-for-profit conservation groups. The money is to help finance projects that specifically address water pollution issues. CWMTF will fund projects that contribute toward a network of riparian buffers and greenways for environmental, educational and recreational benefits. There is no match required by local municipalities, however, the 'suggestion' of a match is highly recommended.

## **Watershed Protection and Flood Protection**

The USDA Natural Resource Conservation Service (NRCS) assists state and local governments in their operation and maintenance of watersheds whose areas are less than 250,000 square acres. The NRCS provides both financial and technical assistance to eligible projects for the improvement of watershed protection, flood prevention, sedimentation control, public water-based fish and wildlife enhancements and recreation planning. The NRCS requires a 50% local match for public recreation and fish/wildlife projects.

## **State Construction Funds**

These funds (not including the Highway Trust Fund for Urban Loops and Interchanges) may be used for the construction of sidewalks and bicycle accommodations that are a part of roadway improvement projects.



### **The North Carolina Conservation Tax Credit**

This program provides an incentive (in the form of an income tax credit) for landowners that donate interests in real property for conservation purposes. Property donations can be fee simple or in the form of conservation easements or bargain sale. The goal of this program is to manage stormwater, protect water supply watersheds, preserve working farms and forests and set-aside greenways for ecological communities, public trails and wildlife corridors. (Go to <http://ncctc.enr.state.nc.us/> for additional information,)

### **Farmland Protection Trust Fund**

Ranging from only a couple hundred thousand dollars to millions of dollars over the last several years, this program is funded through an allocation by the NC General Assembly to the NC Department of Agriculture and Consumer Services. It is a voluntary program designed to protect farmland from development by either acquiring property outright or acquiring conservation easements on the property. The program is administered by the Conservation Trust Fund for North Carolina (CTNC). Questions about available funding should be directed to CTNC.

### **Contributions**

The solicitation of contributions is an acceptable method of fund-raising for recreation departments. These donations, typically in the form of land, cash, labor and materials, could be solicited to assist the City of Shelby with its enhancement program. Corporations, civic organizations, individuals and other groups generally donate to a specific park project; however, donations may also be solicited for multiple project improvements or additions. The National Recreation and Park Association recommends the use of private, not-for-profit, tax-exempt foundations as a means of accepting and administering private gifts to a public park system.

### **Park Foundations**

Foundations are another source of financing by making direct contributions within communities, states or the nation. These types of funds are usually described as special program foundations, general-purpose foundations, or corporate foundations. Foundations generally have very few restrictions and/or limitations, and are typically received from local entities. A list of appropriate foundations can be found at <http://foundationcenter.org>.



## Partnerships

To implement the recommendations contained in the comprehensive master plan, the City of Shelby will most certainly have to expand their partnership agreements with other public agencies and private-sector organizations. There are many different types of partnerships that can be formed to achieve the goals established by the City. In fact, many local governments throughout the nation are utilizing partnerships with public and private-sector interests to accomplish community goals.

Listed below are the various types of partnerships that the City should consider in its efforts for the improvement and addition of parks and recreational facilities:

- Programming partnerships to co-sponsor events and facilities or to allow qualified outside agencies to conduct activities on properties which are municipally owned.
- Operational partnerships to share the responsibility for providing public access and use of facilities.
- Development partnerships to purchase land and/or build facilities.
- Management partnerships to maintain properties and/or facilities.

The City of Shelby is currently participating with partnerships in other related endeavors/functions and should evaluate forming additional partnerships which address the needs of a comprehensive park system. Direct requests should be made to potential partners, asking them to meet and to evaluate the possible benefits of partnering. This step should be made to generate interest and agreement prior to solidifying any responsibilities for each participating party.

Private-sector partnerships can be beneficial to municipalities. Developers can use private funds to develop facilities on municipal property and lease it to the City over a long term. Over a period of time, the developer returns a portion of the revenue to the City and at the end of the lease the facility is turned over to public ownership. This type of arrangement would typically be a large capital investment for a special use facility.



## **Land Acquisition and Development**

There are many different types of land acquisition available to the City of Shelby for park system expansion and/or future development. Due to the land costs and land availability, it is recommended that the City prioritize the property to be acquired for park facilities. Listed below are several methods for acquiring and developing parks:

### **Life Estate**

A life estate is a gift, whereby a donor retains the land during his/her lifetime and relinquishes title of the property after his/her death. In return, the owner (or family) is relieved of property tax for the given land.

### **Local Gifts**

Donations of land, money, labor and construction can have significant impact on the acquisition and development of park property. The solicitation of local gifts is highly recommended and should be organized thoroughly, with the utilization of very specific strategic methods. This often untapped source of obtaining funds requires the contacting of potential donors such as individuals, institutions, foundations, service clubs, et cetera.

### **Easement**

An easement is the most common type of 'less-than-fee' interest in land. An easement seeks to compensate the property owner for the right to use his/her land in some way or to compensate for the loss of his/her privileges to use the land. Generally, the land owner may still use the land and therefore continues to generate property tax revenue for the County.

### **Fee Simple Purchase**

Fee simple purchase is the most common method used to acquire municipal property for park facilities. Although it has the advantage of simplifying justification to the general public, fee simple purchase is the most difficult method to pursue due to limited monetary resources.

### **Fee Simple with Lease-Back or Resale**

This method allows local governments to acquire land by fee simple purchase; yet allows them to either sell or lease the property to prospective users with restrictions that will preserve the land from future development. The fee simple with lease-back or resale method of development commonly results from situations in which land owners, who have lost considerable monetary amounts in property value, determine



that it is more economical to sell the land to the City (with a lease-back option) than to keep it.

### **Long-Term Option**

Long-term options allow municipalities to purchase property over a long period of time. This method is particularly useful because it enables the City to consider a particular pieces of land that may have future value, though it is not currently desired or affordable at the time. There are advantages to this method of property acquisition. The City can protect the future of the land without purchasing it upfront. Meanwhile, the purchase price of the land will not increase and the City will have the right to exercise its option.

The disadvantage to the City is that all privileges relinquished by the land owner require compensation in the form of securing the option.

## **6.5 PLAN ADOPTION**

The first step in implementation of the Comprehensive Parks Master Plan is adoption of the plan by the City of Shelby. By adopting the Comprehensive Parks Master Plan, the community is able to help shape larger regional decisions so that they fit within the goals of the plan. The City also gives itself greater authority in shaping local land use decisions so that they achieve the goals and vision of this plan. In addition, the adoption of this Master Plan is essential in order to maximize available grant opportunities.

Among the opportunities available to promote the recommendations contained in the Master Plan is the ability to *build upon* an already committed and active base of residents, visitors and enthusiasts in the area. Through their organizations, institutions, publications and networks, the City of Shelby can promote both the improved and new parks and greenway facilities and programs.

Second among the opportunities is the *availability* of the existing park facilities (amenities, programs, existing trails, et cetera.) Though some changes are being suggested in the short-term and an expanded network is suggested for the long-term, the presence of an existing network provides a strong foundation from which to build. Many City residents are already accustomed to using the existing park facilities and should become used to seeing new park amenities, programs, signage and other improvements. Building on their existing awareness is much easier than building on no awareness.

## **Action Steps**

Upon adoption of this plan, implementation of specific recommendations can begin. Many of these will occur simultaneously and include policy and facility improvement changes. The key steps are:

- Secure a dedicated source of revenue to address the 10-year and beyond Capital Improvement Program and address the goals of the Master Plan.
- Provide staffing necessary to support and oversee the implementation of this plan and the proper maintenance and operation of the facilities that are proposed; for example, the City may designate or hire an employee to oversee this task.
- Create the City of Shelby Parks and Recreation Endowment Fund through the NC Community Foundation.
- Develop and implement educational and awareness programs such as public events and promotion of parks awareness by civic/environmental advocacy groups. These programs can be used to announce new park facilities and upcoming projects.
- Begin working on the proposed facilities that are listed in the 10-year and beyond Capital Improvement Program. From these opportunities come the framework for an initial implementation strategy:
  - 1) Aggressively begin to establish potential funding mechanisms for future park expansions. This high priority goal is essential for realizing the proposed recommendations for the future growth and development of Shelby's parks and recreation facilities.
  - 2) Use the nucleus of park patrons to expand the awareness of the amenities and programming of the City of Shelby parks and recreation system.
  - 3) Expand and modify the existing park system into a comprehensive, multi-use system, distributed so that it better meets the needs of the community, provides opportunities to all and enhances the current park system.
  - 4) Begin making the critical greenway connections between destination points that will allow for preservation of open space and offer an alternative mode of transportation.

These four steps represent the core of the implementation strategy. As the individual policy recommendations and physical recommendations are addressed, they should each fit with one of these four primary strategies.



- Ensure that park and greenway planning is integrated with other regional planning efforts at the state and local levels, and with long-range and current land use, economic development, parks, environmental and community planning. The following are mechanisms to achieve this action step:
  - 1) Expand local capital improvements program for yearly appropriation for greenway and park development.
  - 2) Set aside money for land acquisition, construction and maintenance of parks and greenway facilities in the annual operating budget.
  - 3) Pursue and request pedestrian/bicycle projects to be added to NCDOT TIP.
  - 4) Pursue developing and expanding existing and new partnerships.
  - 5) Apply for PARTF Grants and other related recreation grants for park projects and improvements.
  - 6) Seek other sources of revenue funding for parks and greenway improvements, such as including local assessment districts, developer exactions, et cetera.
  - 7) Pursue funding from other sources listed in this section.

## 6.6 CONCLUSION

This Comprehensive Parks Master Plan has laid out a set of strategies for expanding and developing a safe, convenient and usable park system as reflected in the following:

- Expansion and enhancement of existing facilities; and
- Creation of new facilities in areas of demand.

The plan has assessed the study area, analyzed the existing facilities, received community input, reviewed recreation standards, developed recommendations and provided strategies for implementing the plan. The Comprehensive Parks Master Plan is a comprehensive guide to be used in the improvement and enhancement of the park system for the City of Shelby Parks and Recreation Department.

**- END OF SECTION -**

