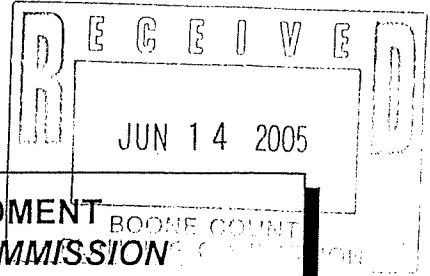


OS-zma-018-A

6/14/05

APPLICATION FORM



ZONING MAP AMENDMENT
BOONE COUNTY PLANNING COMMISSION

(See Boone County Zoning Regulations)

SECTION A (To be completed by applicant)

1. Name of Project Hance Property
2. Location of Project Ky. Hwy. 16, Walton-Nicholson Pike
3. Total Acreage of Site 48 Acres
4. Current Zoning of Site A-2
5. Proposed Zoning (Classification being requested) SR-2
6. Proposed Uses (please specify each use) Single Family Residence

7. Names of Applicant(s) James W. Berling
Phone Number 331-9191 Fax No. 344-7422
8. Address of Applicant(s) 1671 Park Road, Suite One
Ft. Wright, Kentucky 41011
City State Zip
9. Name of Property Owner(s) Daniel & Evelyn Hance & George & Sara Anderson
Phone Number 485-7193 485-7361 Fax No. _____
10. Address of Property Owner(s) 273 & 293 Walton-Nicholson Pike
Walton, Kentucky 41094
City State Zip
11. Proposed Building Intensities (please specify) Residential

12. Are there any existing buildings on the site? Yes
How many? Four
13. Deed Book 234-659-659 Page No. 142-158-160 Group No. 2080
14. Are you also applying for:
No Conditional Use Permit
No Dimensional Variance
15. Have you submitted a Concept Development Plan? Yes
16. Have you had a pre-application meeting with BCPC Staff? No
17. Please check the following organizations/agencies which you have discussed the proposed development within the last several months:

- _____ Boone County Water District
- _____ Florence Water and Sewer Dept.
- _____ Cinergy/U.L.H.&P. Co.
- _____ Sanitation District #1
- _____ Cincinnati Bell
- _____ Owen County Rural Electric
- _____ Boone County Public Works Department
- _____ Kentucky Transportation Cabinet
- _____ City of Florence Public Services Department
- _____ Boone County Building Department

Hance 659/140
659/158
Anderson 234/142

EXHIBIT

“A”

STAFF REPORT

The request of **James W. Berling (applicant)** for **Daniel Hance, Evelyn Hance, George Anderson, and Sara Anderson (owners)** for a Zoning Map Amendment from Rural Suburban (RS) and Agricultural Estate (A-2) to Suburban Residential Two (SR-2) for a 48 acre area located at 247, 273, and 293 Walton-Nicholson Road, Walton, Kentucky. The request is for a zone change to allow the Boone County portion of a subdivision, for single family residences, that will be located in both Boone and Kenton counties.

August 3, 2005

REQUEST

The applicant is proposing approximately 151 lots on 48 acres in Boone County for a density of 2.15 dwelling units per acre. The Suburban Residential Two (SR-2) zone allows 8 dwelling units per acre with a minimum lot size of 6,500 square feet and minimum lot frontage of 50 feet for detached single family and patio homes.

Access into this proposed subdivision is shown off Walton-Nicholson Road in Boone County. Walton-Nicholson Road is a State maintained road and an encroachment permit will be required from the District 6 Office of the Kentucky Transportation Cabinet (see attached comments). No access points are shown into the adjoining parcels to the west between this development and the North Walton Commerce Park. The only additional access point shown is in Kenton County to the south toward Percival Road.

The City of Walton annexed the entire site (both in Boone and Kenton Counties) into the City and currently has the recommendation for denial from the Kenton County & Municipal Planning & Zoning Commission (by a vote of 6 to 5) for the Kenton County portion of the project.

ADJACENT ZONING AND LAND USES

- North: Residential and agricultural property ranging in size from 1 acre to 18.57 acres across Walton-Nicholson Road zoned Rural Suburban (RS).
- East: Across the Boone/Kenton County Line which lies the remaining 138 acres of the proposed development. The current zoning designation in Kenton County is Agricultural One (A-1) which permits one (1) dwelling unit per acre.
- South: The Kunkel property consisting of approximately 95 acres (unincorporated Boone County) zoned Agricultural Estate (A-2).

West: O'Donnell (1.12 acres) zoned Rural Suburban (RS), Townsend (4.72 acres) and Robke (35.41 acres) zoned Rural Suburban (RS) and Agricultural Estate (A-2) located in unincorporated Boone County. Further west is the North Walton Commerce Park zoned Industrial One with an approved Concept Development Plan (I-1/CD).

RELATIONSHIP TO COMPREHENSIVE PLAN

The Future Land Use Map shows the subject property as Industrial (I). This classification is defined in the adopted Comprehensive Plan as:

Industrial: "Manufacturing, wholesale, warehousing, distribution, assembly, mining, and terminal uses."

The Land Use Element within the 2000 Boone County Comprehensive Plan only refers to this general area by stating:

"The Walton area should experience gradual commercial, residential, and industrial growth. This growth should result primarily from the Walton interchange, and its location near the intersection of I-71 and I-75."

"The City of Walton is being surrounded by industrial development and zoning to the north, south, and west of the City. Therefore, to ensure the integrity of the central portion of Walton, the area from the former Turner Fishing Lake to Boone Lakes should have a land use designation of Suburban Residential. This would allow the central portion of Walton to experience residential growth in response to the employment growth and utility expansion in the area. Suburban Residential development is occurring south of Chambers Road."

The Housing Element (page 88) refers to the **Walton-Verona** area by stating:

"Walton has annexed several areas north and west of the city to provide public water service and has experienced significant subdivision development during the 1990's."

The adopted 2005 Boone County Comprehensive Plan Goals and Objectives include the following pertinent statements:

- A. Proper planning is achieved through specific land use regulation tools and coordination with public infrastructure ("Overall," Goal).

- B. Boone County shall be viewed as an integral part of the Cincinnati Metropolitan Area ("Overall," Objective 1).
- C. Development issues shall be viewed in terms of promoting overall quality of life. Mixing of residential and other land uses shall be encouraged, within appropriately planned and designed neighborhood developments ("Overall," Objective 2).
- D. Proper design principles shall be applied in development ("Overall," Objective 3).
- E. Future growth shall be accompanied by adequate infrastructure and services. Existing infrastructure and services shall be monitored, maintained and improved as needed ("Overall," Objective 4).
- F. The needs of Boone County's population are measured and fulfilled through the provision of orderly growth ("Population," Goal).
- G. Boone County's development policies shall provide equal opportunity for the establishment of a balanced population regardless of age, race, or socio-economic status ("Population," Objective).
- H. New development or redevelopment within Boone County is designed, constructed and operated in such a way that the quality of the existing physical environment and social environment are enhanced. Development within Boone County preserves and promotes a better quality of life ("Environment," Goal).
- I. New development or redevelopment shall attempt to design sites utilizing existing topography and vegetation, and encourage preservation of the existing character of the land. New development shall be designed in harmony with the physical environment in such a way that each site's existing physical assets are used. Residential development design in particular should minimize grading work as opposed to clearing the entire site. Existing trees and pasture land shall be evaluated during the design and construction process as a visual and economic benefit to the community ("Environment," Physical Objective 2).

Table 2.5 in the Population Element (page 21) shows the population by traffic zone. In 1990, the population within this traffic zone (884) was 1,857 and in 2000 grew to 2,107. This geographic zone is bound by Walton-Nicholson Road to the north, Interstate 75 to the south and west and the County line to the east. The development has occurred primarily in subdivisions such as Sunset Ridge, Wildcat Run and Showalter Green. The projected population for this traffic zone (884) as shown in Table 2.15 (page 28) is 3,206 by 2010.

STAFF CONCERNS/COMMENTS

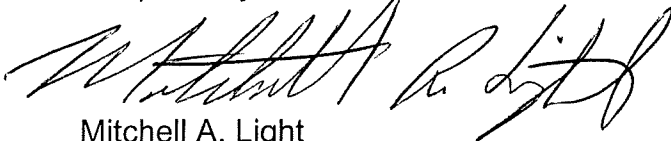
1. The Concept Development Plan shows no proposed street connection to the west. Properties owned by Robke and Kunkel (approximately 130 acres) are the only parcels between this development and the proposed North Walton Commerce Park request. Staff feels that if this request is approved that it could be the primary access point, not only for this development, but also any future residential development west and south along the Boone/Kenton County line with the potential of connecting to Percival Road. The proposed boulevard shows no individual driveway access and could provide a necessary north/south connection.
2. Staff questions the appropriateness of this type of development given that the projected Future Land Use is Industrial (I) as shown in the 2000 Boone County Comprehensive Plan and that there are existing industrial uses nearby. The projected Future Land Use in Kenton County is industrial as well.
3. No traffic impact study has been provided for Staff to review. We do not know the potential impacts on the existing road infrastructure and what improvements will be necessary to the existing road infrastructure, or whether there will be a need for acceleration and deceleration lanes on Walton-Nicholson Road.
4. Staff questions whether the proposed boulevard will have 4' wide sidewalks on both sides or is the applicant proposing 6' along one side?
5. The applicant has not supplied Staff with specifics, such as the minimum lot size, minimum lot frontage, setbacks and proposed housing types. The Suburban Residential Two (SR-2) zone allows detached single family, duplex dwelling units, patio homes and townhomes.
6. The Walton-Verona Schools have supplied a letter outlining their concerns with this proposed development which is attached to this Staff Report.
7. Also attached is an e-mail that Northern Kentucky Tri-ED submitted for the North Walton Commerce Park proposed Zoning Map Amendment. It is attached for reference purposes based on this proposals Future Land Use designation and proximity to the North Walton Commerce Park request.
8. If approved, the Future Land Use Map would need to be amended.

CONCLUSION

The Boone County Planning Commission and the City of Walton must review this request on the basis of its relationship to the Comprehensive Plan and in terms of the three (3) criteria necessary for a Zoning Map Amendment.

1. The map amendment request is in agreement with the adopted Comprehensive Plan and any specific study designed to further detail the Boone County Comprehensive Plan for the location in question; or,
2. The existing zoning classification is inappropriate and that the proposed zoning classification is appropriate; or,
3. There have been major changes of an economic, physical, or social nature not anticipated in the adopted Comprehensive Plan that substantially alter the area's character.

Respectfully Submitted,

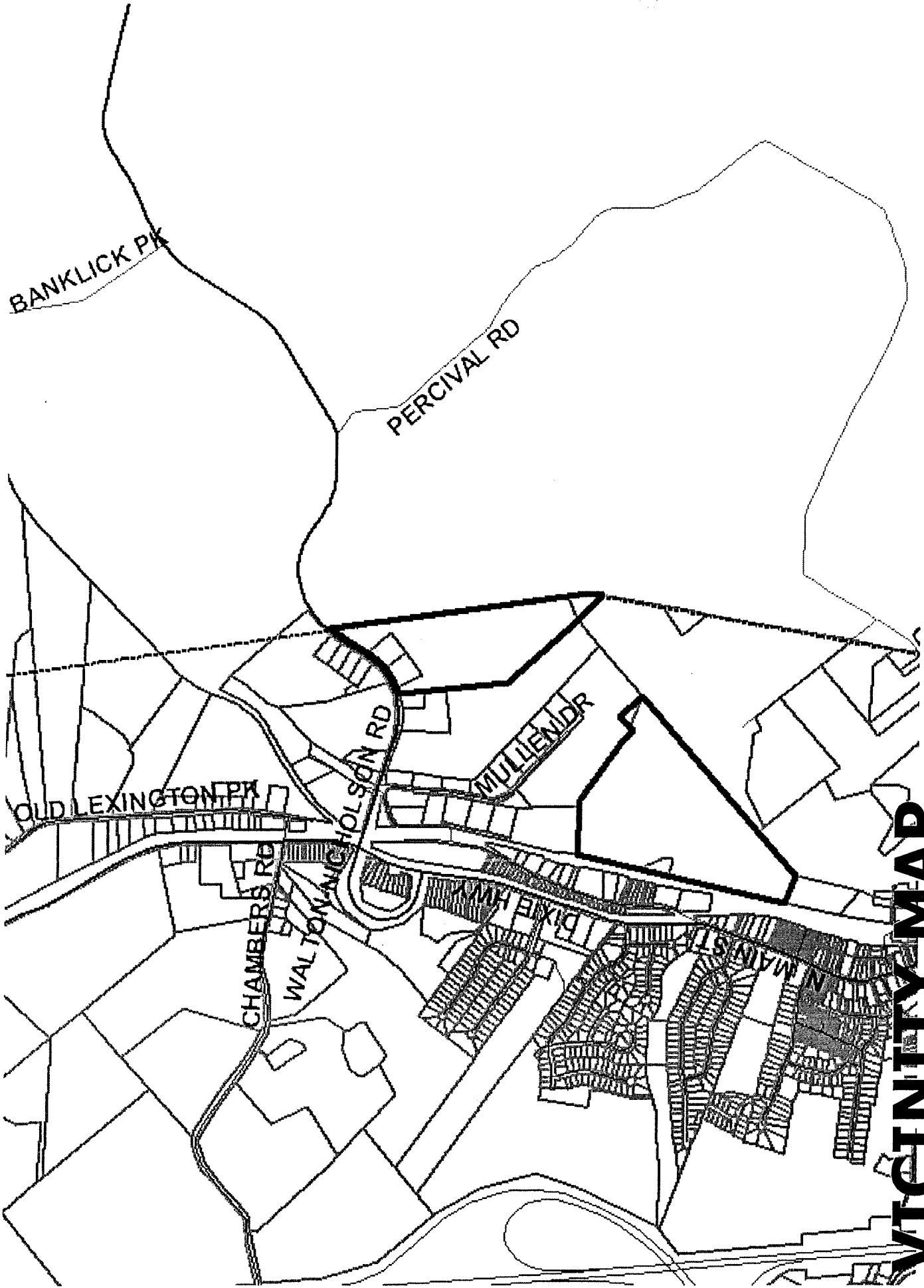


Mitchell A. Light
Asst. Zoning Administrator/Enforcement Officer

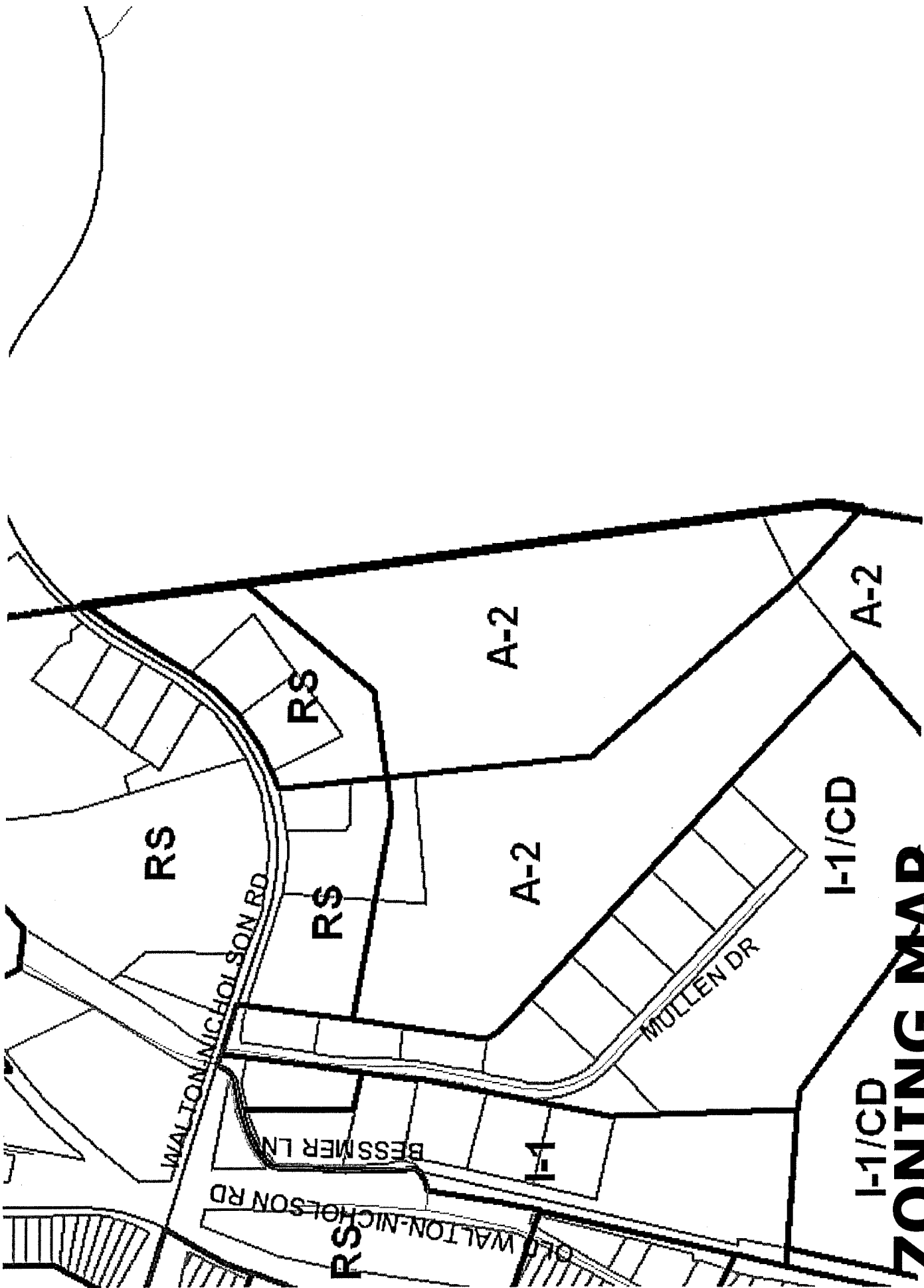
MAL/pr

Attachments:

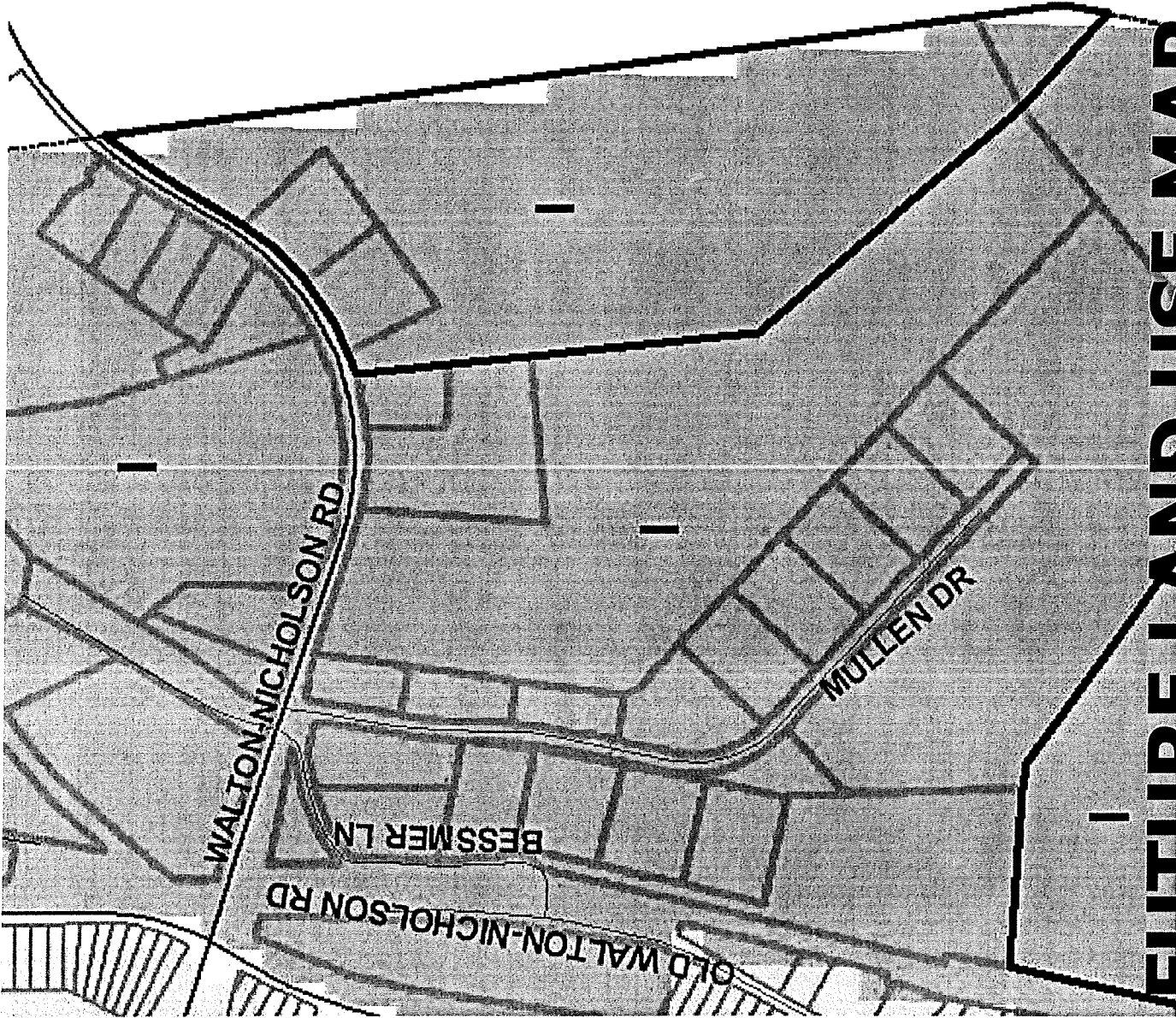
- Vicinity Map
- Zoning Map
- Future Land Use Map
- Existing Topography
- 2004 Aerial Photography
- Overall Concept Plan
- Concept Plan (Boone County Section Only)
- Relationship of Both Requests
- Letter from Bill Boyle, Superintendent, Walton-Verona Independent Schools
- Letter from Ed Thompson, Permit Supervisor, KTC District 6
- KC&MP&ZC Statement of Recommendation
- E-Mail from Dan Tobergte, President & CEO, NKY Tri-ED
- Application



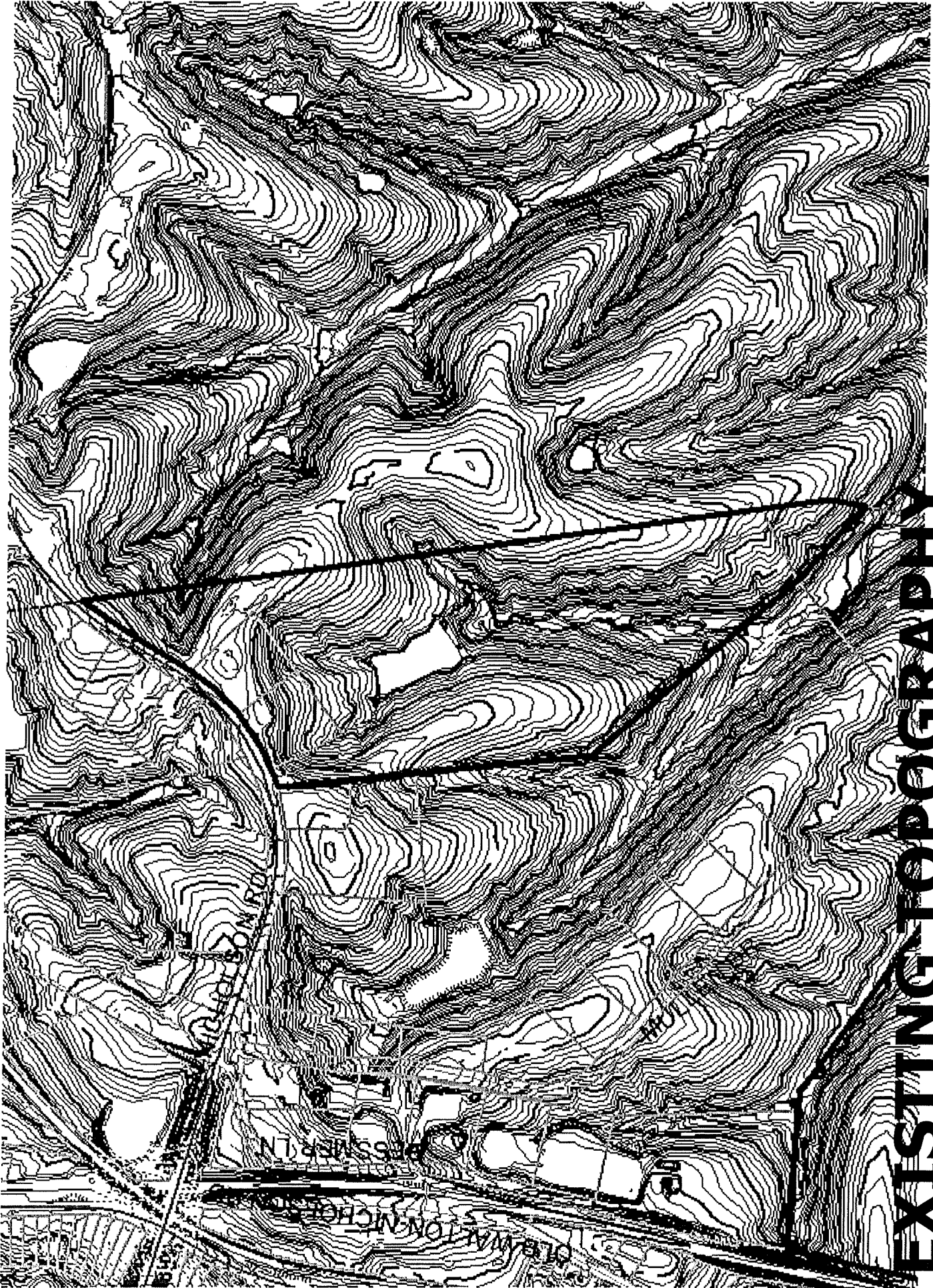
VICINITY MAP



I-1/CD
ZONING MAP



FUTURE LAND USE MAP



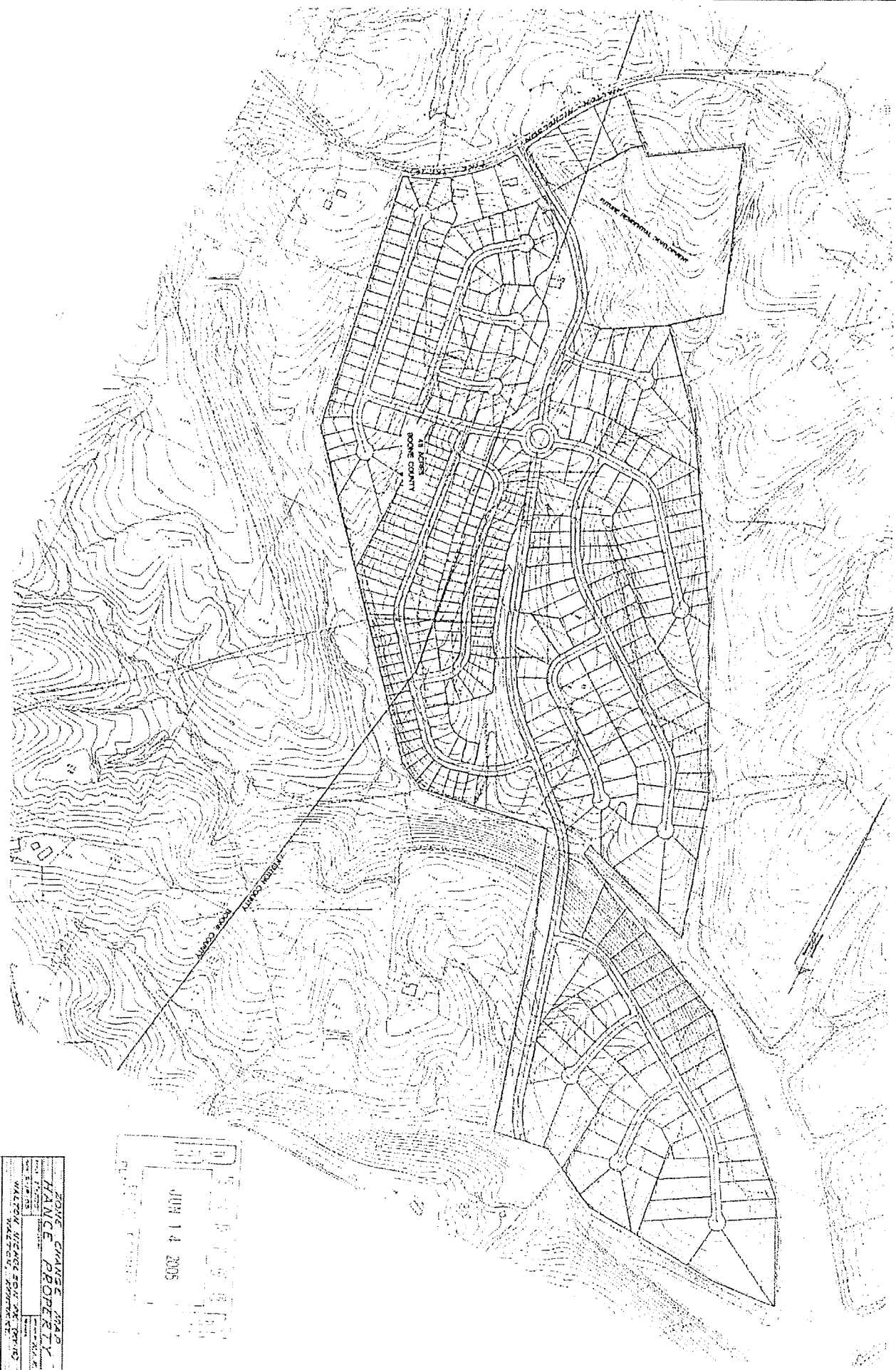
EXISTING TOPOGRAPHY



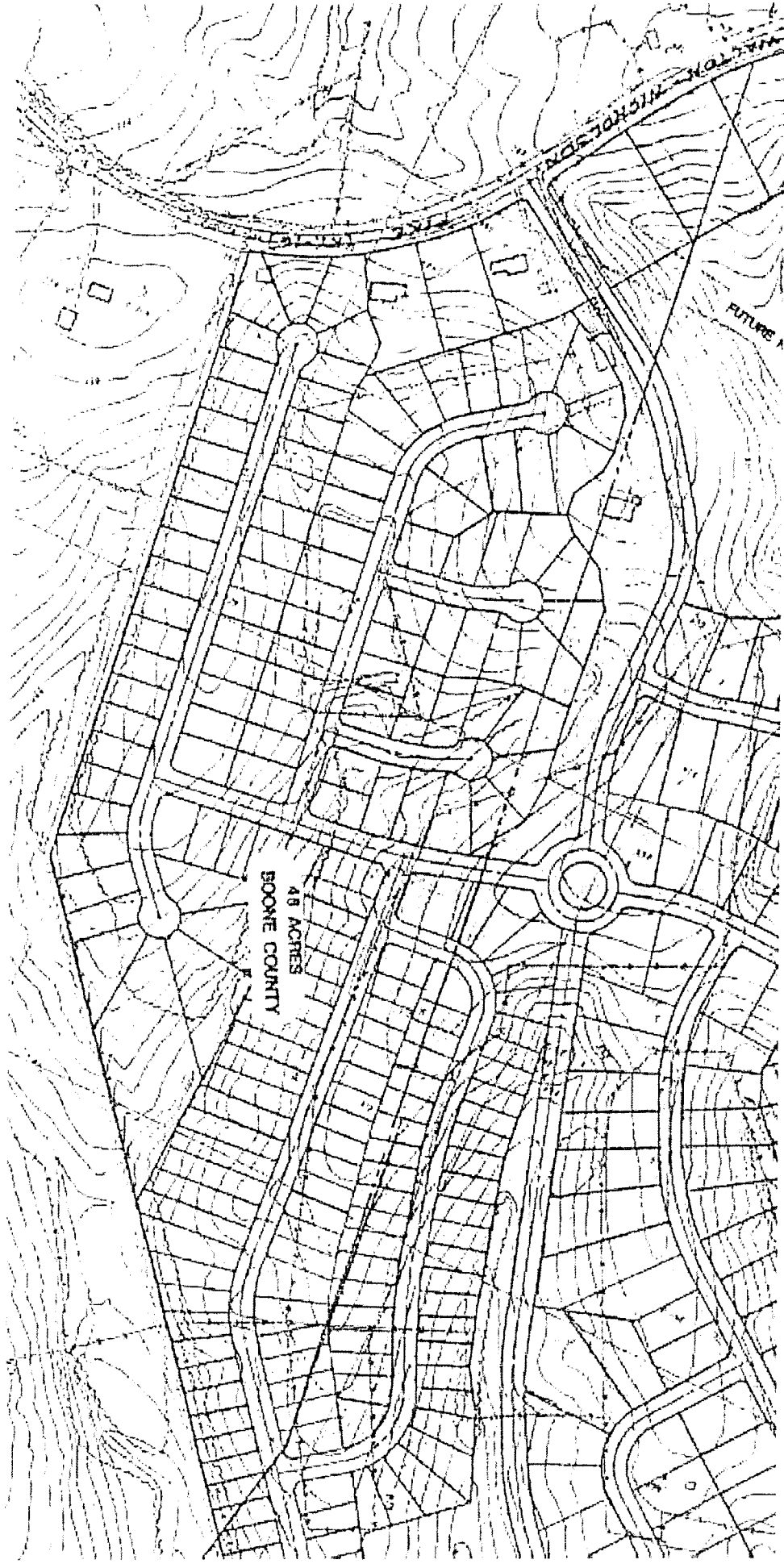
2004 AERIAL PHOTOGRAPHY

ZONE CHANGE MAP
 HANCE PROPERTY
 WALTERS & WILSON ENGINEERING
 WALTERS WILSON ENGINEERING
 WALTERS WILSON ENGINEERING

JUN 14 2005
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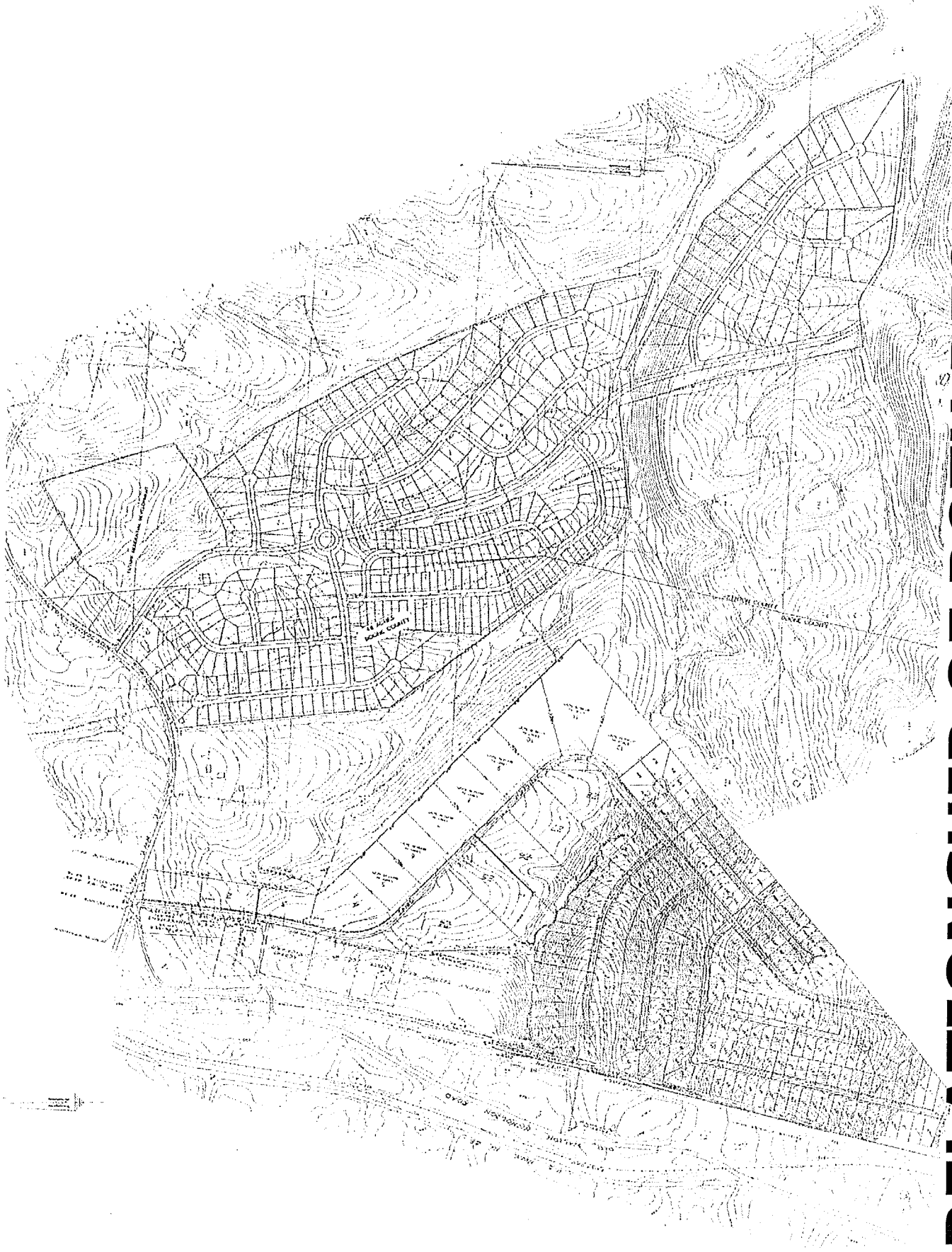


OVERALL CONCEPT PLAN NORTH >



CONCEPT PLAN

NORTH >



RELATIONSHIP OF BOTH REQUESTS

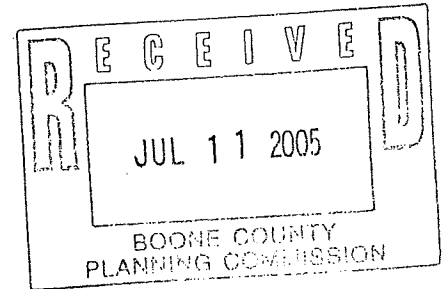
Walton-Verona Independent Schools

Accredited by Southern Association of Colleges and Schools

16 School Road • Walton, Kentucky 41094
Phone: (859) 485-4181 • Fax: (859) 485-1810
www.w-v.k12.ky.us

June 28, 2005

Mitchell A. Light
Boone Co. Planning Commission
2995 Washington St.
Burlington, Ky 41005



Dear Mr. Light,

With regard to the request of James W. Berling (applicant) for Daniel Hance, Evelyn Hance, George Anderson and Sara Anderson (owners) for a Zoning Map Amendment from Agricultural Estate (A-2) to Suburban Residential (SR-2) for a 48 acre area located at 247,273 and 293 Walton-Nicholson Road, Walton, Kentucky, we provide the comments below.

We oppose future high density housing projects within the Walton-Verona School District. We are beyond our capacity for our current student population, with inadequate funding to build another school. We are experiencing explosive growth in our district and simply do not have room for additional students. We are currently utilizing eight (8) trailers or mobile classrooms with more on the horizon as existing developments build out. Simply put, we can't handle any more high density housing developments and continue to provide the level of educational services to our community that has enabled us to be among the best in the state of Kentucky. That being said, Sr-2 up to 8 per acre is not acceptable. Homes that are on 1 plus acre lots are more within the limits of what we could handle on this project.

Another concern is the layout of the project. The layout shows numerous lots that are bisected by the Boone County/Kenton County line. While this may not be a problem for the developer it is a problem for school districts, fire districts, emergency management and taxing entities in general. For all of the aforementioned groups, there needs to be a clear line of division from county to county. This county line needs to either be defined down the middle of the street or clearly at the end of property boundaries. It makes no sense, in a case like this where it can be done correctly, to have anyone's property in two counties. This is necessary so that the property owner knows what school they will attend, what fire department will respond, what police department will respond, and to what entities they will be paying taxes. These are issues that can be resolved and must be resolved.

Bill Boyle
Superintendent

Gene Kirchner
Deputy Superintendent

Pam Saylor
Director of Student Services

Claudia Coleman
Treasurer

Dan Stenger
Director of Technology



Board Members:

William M. Wethington
Chairman

Shirley E. Cummins
Vice-Chairman

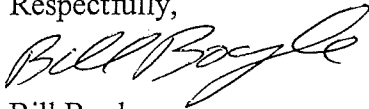
John Daugherty

Kelly Fulmer

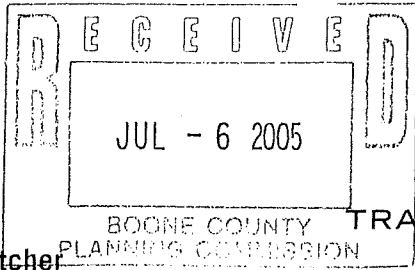
Walt Ryan

Again, the time has come when common sense must prevail and allow our schools and infrastructure to support proposed development. **Few care about the impact on schools at this point of the process, but everyone that purchases a home cares when it is too late and we are unable to house the children and provide adequate services.** Please contact me with any questions or concerns. I would be glad to meet with anyone regarding this project at your convenience.

Respectfully,

A handwritten signature in cursive script that reads "Bill Boyle". The signature is written in black ink and is positioned above the printed name and title.

Bill Boyle
Superintendent



Ernie Fletcher
Governor

BOONE COUNTY
TRANSPORTATION CABINET
PLANNING COMMISSION

Frankfort, Kentucky 40622
www.kentucky.gov

Bill Nighbert
Acting Secretary

Jim Adams
Deputy Secretary

Marc Williams
Commissioner of Highways

Dan Druen
Commissioner of
Administrative Services

Paul Steely
Commissioner of Aviation

Roy Mundy
Commissioner of
Vehicle Regulation

Boone County Planning Commission
2995 Washington Street
Burlington, KY 41005
Attn.: Mitchell Light, Asst. Zoning Administrator

Subject: Development Plan, Boone/Kenton County Line
KY 16 – Boone County

July 1, 2005

Dear Mr. Light:

This letter is in response to your letter dated June 23, 2005, regarding a proposed development located on KY 16 in Walton, Kentucky.

The Department has reviewed the proposed development plans for this site. The entrance location will need to meet our standards and specifications for sight distance and safety at the location indicated.

This is subject to the Formal Encroachment Permitting Application that is required to be forwarded to the Department for final review.

This office would like to thank you for this opportunity to comment on these proposed developments in Boone County. If any additional information is desired, please contact me at (859) 341-2700, Ext. 307.

Sincerely,

Edmond C. Thompson
Permit Supervisor

ECT/csm

Cc: Thomas J. Schomaker, CDE

**KENTON COUNTY & MUNICIPAL PLANNING & ZONING COMMISSION
STATEMENT OF RECOMMENDATION**

NUMBER: 1749R

WHEREAS

James W. Berling, on behalf of Daniel and Evelyn Hance and George and Sara Dean Anderson, HAS SUBMITTED AN APPLICATION REQUESTING THE KENTON COUNTY PLANNING COMMISSION TO REVIEW AND MAKE RECOMMENDATIONS ON: A proposed map amendment to the Walton Zoning Ordinance, changing an approximate 138-acre area located along the south side of Walton Nicholson Pike, at the Kenton/Boone County border, from A-1* (an agricultural one zone) to R-1F (a single-family residential zone); AND

WHEREAS

A PUBLIC HEARING WAS HELD ON THIS APPLICATION ON THURSDAY, JULY 7, 2005, AT 6:15 P.M., IN THE NORTHERN KENTUCKY AREA PLANNING COMMISSION'S FIRST FLOOR MEETING ROOM, 2332 ROYAL DRIVE, FORT MITCHELL, KY;; AND A RECORD OF THAT HEARING IS ON FILE AT THE OFFICES OF THE KENTON COUNTY PLANNING COMMISSION, 2332 ROYAL DRIVE, FORT MITCHELL, KENTUCKY.

NOW, THEREFORE,

THE KENTON COUNTY PLANNING COMMISSION SUBMITS THE FOLLOWING RECOMMENDATIONS, ALONG WITH SUPPORTING INFORMATION AND COMPREHENSIVE PLAN DOCUMENTATION:

KCPC RECOMMENDATION – WALTON ZONING ORDINANCE:

To disapprove the proposed map amendment from A-1* to R-1F.

COMPREHENSIVE PLAN DOCUMENTATION:

- Date of Adoption by the Kenton County Planning Commission: December 18, 2001.

SUPPORTING INFORMATION/BASES FOR KCPC RECOMMENDATION:

1. The proposed map amendment from A-1* to R-1F is not consistent with the Land Use Plan Map of the 2001 Area-Wide Comprehensive Plan Update which identifies the site in question for Industrial uses. The proposed R-1F Zone would allow residential development to occur in an area recommended for industrial uses.
2. The existing A-1* Zone is appropriate for the area given the existing land uses adjacent, and in the vicinity, of the site in question. The site in question, and the general area surrounding the site in question is characterized by rural development and activities. The existing A-1* Zone will provide for a consistent development pattern.

3. There have not been any major changes of an economic, physical, or social nature, within the vicinity of the site in question, since the adoption of the 2001 Area-Wide Comprehensive Plan Update to warrant the proposed map amendment.

ALEXANDRA K. WELDON, CHAIR
KENTON COUNTY PLANNING COMMISSION

Mitch Light

From: Dan Tobergte [det@NorthernKentuckyUSA.com]
Sent: Monday, July 18, 2005 4:45 PM
To: Mitch Light
Cc: Judge Moore; 'Patty Krohman'; 'Wm. T. Robinson III'; 'Judge Executive Steve Pendery'; 'Karen Finan'; 'Mr. Bob Green'; 'Paul Smith'; 'Lori Reed'
Subject: Zoning Map Amendment: Bessmer Lane, LLC Owners

Mitch:

Thank you for proving me with the memo indicating the intention of Bessmer Lane, LLC to seek rezoning of approx. 68 acres of land in the North Walton Commerce Park from Industrial One to Suburban Residential One (SR-1). A response by email was encouraged by your memo. Attached is the current KCED site map for this site.

While the absorption of industrial land by industrial users has not been particularly encouraging to Northern Kentucky's industrial site developers over the last five years, Northern Kentucky Tri-ED wishes to express our opinion in opposition to this zone change.

This site is adjacent to the Norfolk Southern mainline railroad track and can easily be served by Norfolk Southern with a lead track turnout from the mainline,. Further, Norfolk Southern can adequately provide shuttle service to this site from its yard operations in Cincinnati. This ability to serve this site was recently confirmed in writing to Northern Kentucky Tri-ED on April 14, 2005 after an in-field inspection of this site by Robby Klein, Industrial Development Manager of Norfolk Southern. Mr. Klein and I reviewed this site among three others for an industrial prospect that needed a 40-acre rail served site for its operations in late March of this year.

Of the sites that Mr. Klein reviewed, this site offered the best opportunity for immediate site and rail service development in all of Northern Kentucky for Norfolk Southern. Within Northern Kentucky, we have a lack of well-qualified, ready-to-go industrial rail-served sites. The North Walton Commerce Park rail-served site is relatively level, has adequate access to both the Richwood and Walton Interstate 75/71 Exits/Entrances, has sufficient utilities for light industrial uses, is controlled by a single owner willing to market and sell the property at a competitive price, is of sufficient size and configuration to be attractive to light industrial rail users and is properly zoned.

Please feel free to contact me at 859-344-0040 regarding this site. Thank you for informing Northern Kentucky Tri-ED of this re-zoning request.

c. Northern Kentucky Tri-ED Executive Committee
Northern Kentucky Tri-ED Staff: Bob Green, Paul Smith, Lori Reed and Karen Finan

Daniel E. Tobergte
President & CEO
Northern Kentucky Tri-ED
P.O. Box 17246
Covington, KY 41017
det@NorthernKentuckyUSA.com
859-344-0040 Office
888-874-3365 Toll Free
859-750-4041 Mobile
www.NorthernKentuckyUSA.com

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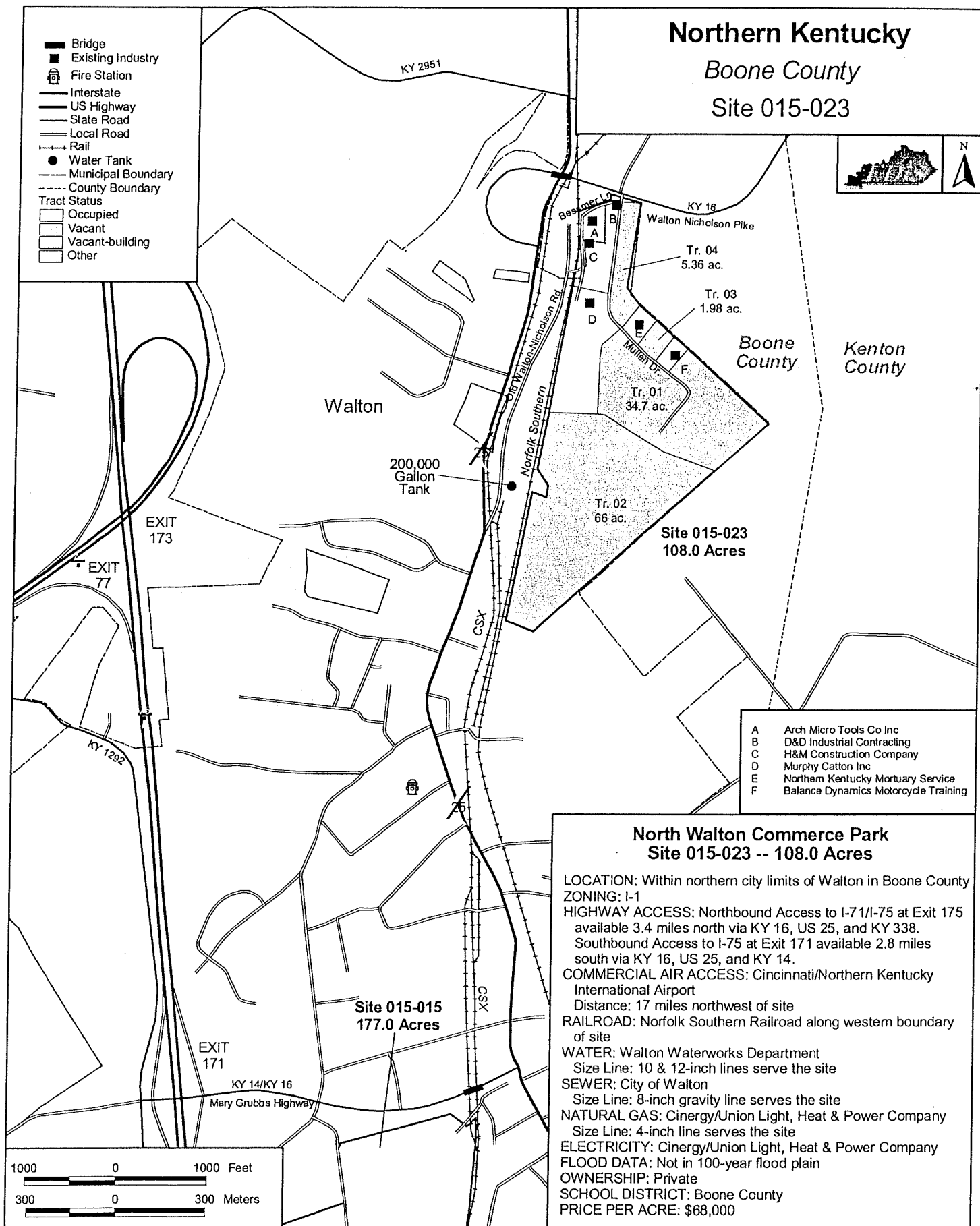
Northern Kentucky

Boone County

Site 015-023



- Bridge
- Existing Industry
- 🚒 Fire Station
- Interstate
- US Highway
- State Road
- Local Road
- Rail
- Water Tank
- Municipal Boundary
- - - County Boundary
- Tract Status
- Occupied
- Vacant
- Vacant-building
- Other

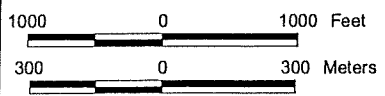


- A Arch Micro Tools Co Inc
- B D&D Industrial Contracting
- C H&M Construction Company
- D Murphy Catton Inc
- E Northern Kentucky Mortuary Service
- F Balance Dynamics Motorcycle Training

North Walton Commerce Park Site 015-023 -- 108.0 Acres

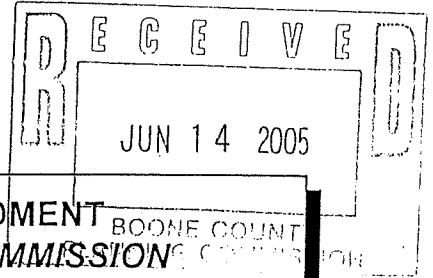
LOCATION: Within northern city limits of Walton in Boone County
ZONING: I-1
HIGHWAY ACCESS: Northbound Access to I-71/I-75 at Exit 175 available 3.4 miles north via KY 16, US 25, and KY 338. Southbound Access to I-75 at Exit 171 available 2.8 miles south via KY 16, US 25, and KY 14.
COMMERCIAL AIR ACCESS: Cincinnati/Northern Kentucky International Airport
 Distance: 17 miles northwest of site
RAILROAD: Norfolk Southern Railroad along western boundary of site
WATER: Walton Waterworks Department
 Size Line: 10 & 12-inch lines serve the site
SEWER: City of Walton
 Size Line: 8-inch gravity line serves the site
NATURAL GAS: Cinergy/Union Light, Heat & Power Company
 Size Line: 4-inch line serves the site
ELECTRICITY: Cinergy/Union Light, Heat & Power Company
FLOOD DATA: Not in 100-year flood plain
OWNERSHIP: Private
SCHOOL DISTRICT: Boone County
PRICE PER ACRE: \$68,000

Site 015-015
177.0 Acres



6/14/05

APPLICATION FORM



ZONING MAP AMENDMENT
BOONE COUNTY PLANNING COMMISSION

(See Boone County Zoning Regulations)

SECTION A (To be completed by applicant)

1. Name of Project Hance Property
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 4. Current Zoning of Site A-2
 5. Proposed Zoning (Classification being requested) SR-2
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7. Names of Applicant(s) James W. Berling
Phone Number 331-9191 Fax No. 344-7422
 8. Address of Applicant(s) 1671 Park Road, Suite One
Ft. Wright, Kentucky 41011
City State Zip
 9. Name of Property Owner(s) Daniel & Evelyn Hance & George & Sara Anderson
Phone Number 485-7193 485-7361 Fax No. _____
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City State Zip
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How many? Four
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No Dimensional Variance
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 16. Have you had a pre-application meeting with BCPC Staff? No
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- _____ Boone County Water District
- _____ Florence Water and Sewer Dept.
- _____ Cinergy/U.L.H.&P. Co.
- _____ Sanitation District #1
- _____ Cincinnati Bell
- _____ Owen County Rural Electric
- _____ Boone County Public Works Department
- _____ Kentucky Transportation Cabinet
- _____ City of Florence Public Services Department
- _____ Boone County Building Department

ZONING MAP AMENDMENT
APPLICATION
PAGE 2

- Northern Kentucky Health District
- USDA NRCS/Boone County Conservation District
- KY Division of Water
- Local School District
- Local Fire District
- Other: City of Walton

18. Project Jurisdiction/Location
- Unincorporated Boone County
 - Florence
 - Walton Union

19. Applicant's Signature [Signature]
- Property Owner's Signature [Signature] [Signature] [Signature]

SECTION B (To be completed by BCPC Staff)

1. Date Received 6-14-05
2. Review Fee \$1769.00 R# 42739
3. Check what has been submitted:
 - Application
 - Fee
 - Legal Description
 - Concept Development Plan
 - Address of Adjoining Property Owners
 - 5 Number of copies of plan received**
4. Is application complete? Yes No
5. Staff Reviewer _____
6. Committee Chairman _____
7. Scheduled Public Hearing Date _____
8. Boone County Planning Commission Action:
 - Approval
 - Approval with Conditions
 - Denial
9. Other: _____

** Five (5) Copies Are Required

Boone County Planning Commission
2995 Washington Street
Burlington, Kentucky 41005
(859) 334-2196 - Phone
(859) 334-2264 - Fax
plancom@boonecountyky.org - E-mail
www.boonecountyky.org - Web Page

NOTE: An application consists of all fees paid in full, submitted drawings and a completed application form.

**BOONE COUNTY PLANNING COMMISSION
BOONE COUNTY ADMINISTRATION BUILDING
COURTROOM 3A
August 3, 2005
7:30 P.M.**

PUBLIC HEARINGS

Commission Members Present: Mr. Barlow, Mr. Breetz, Mr. Bungler, Mr. Caddell – Chairman, Mr. Carmichael, Mrs. Kegley, Mr. McMillian, Mr. Poe, Mrs. Poston - Vice Chairperson, Mr. Schwenke, Mr. White, and Mrs. Wilson – Secretary/Treasurer.

Staff Members Present: Mr. Kevin Costello, AICP, Executive Director; Ms. Jan Hancock, Secretary; and Mr. Mitch Light, Assistant Zoning Administrator/ZEO.

Legal Counsel Present: Mr. Dale Wilson

Mr. Arnold Caddell, Chairman, called the meeting to order at 7:45 PM and introduced the first item on the Agenda:

Applicant: James W. Berling for Daniel Hance, Evelyn Hance, George Anderson and Sara Anderson (owners)

Request: Zoning Map Amendment

The request of James W. Berling (applicant) for Daniel Hance, Evelyn Hance, George Anderson and Sara Anderson (owners) for a Zoning Map Amendment from Agricultural Estate (A-2) to Suburban Residential Two (SR-2) for a 48-acre area located at 247, 273, and 293 Walton-Nicholson Road, Walton, Kentucky. The request is for a zone change to allow the Boone County portion of a subdivision for single-family residences that will be located in both Boone and Kenton counties.

Staff Member Mitch Light presented the Staff Report which included a Power Point presentation (see Staff Report).

Mr. Schwenke left the meeting at this time.

Following an explanation of the Public Hearing process, the Chairman asked for the applicant's presentation.

Mr. Jim Berling, applicant and engineer for the proposed development, stated that the Anderson family and the Hance family, as well as the gentlemen who will be developing the property, are present this evening to answer any questions. Mr. Berling stated that this property is unique in its location and it is especially appropriate for the residential uses they are proposing. He stated that the Long-Term Plan and other studies have identified the area for industrial. He stated that some of his partners in developing this property are also involved with the adjacent parcel (Public Hearing Item #2 this evening) and they believe industrial is not appropriate for this location. He stated that they started in the North Walton Industrial Park five years ago and they have sold three lots. He stated that the industrial use has not worked because of the location, the topography, and the roadway. Mr. Berling asked Staff about the three letters that we received from neighbors. Mr. Light responded that copies of the letters are in the packets and he will submit them. Mr. Berling stated that one of the letters states that Walton-Nicholson Pike had a double yellow line from one end to the other. He stated that the reason for that is that there are no opportunities to pass in a legal manner because of the many curves. He reviewed how trucks would have to travel from the site to get on U.S. 25 and go through the City of Walton to the interstate system and stated that the site is not suited for industrial development, but it is well suited for residential development. He stated that the current zoning is inappropriate and the proposed residential zoning is appropriate. He stated that there are some interconnecting roadways that they have not shown on the plan, but it is a Concept Plan. He stated that they will tie into the adjacent properties to the east, west, and south – they will do whatever is required. They do not know exactly where the neighbors want to tie in, but they will make the tie-ins when the time comes. He stated that the road will be a thoroughfare similar to Triple Crown but going in a north/south direction. He stated that the property is viable because people can cross the railroad on Walton-Nicholson Pike with the new loop built over the top. He stated that money has been approved to extend Mary Grubbs Highway over the railroad so that people will be able to cross down there. He stated that the City of Walton is currently limited in getting across the railroad tracks and connecting a good road like they are proposing from one of the railroad crossings to the other will open the area for a lot of other developments. He stated that they have various lot sizes from 50 feet to 100 feet on the plan – they wanted to mix the lot sizes because it then becomes a total community with different uses. They have not shown any attached housing and if they have attached housing in the future, they would have to come back to the Planning Commission. He referred to the letter from Tri-ED (see e-mail attached to the Staff Report from Daniel E. Tobergte, President & CEO of Northern Kentucky Tri-ED), and stated that no one from Tri-ED has sold a lot for industrial development in this area. The completed the applicant's presentation.

Chairman Caddell asked if there was anyone else present who wished to speak in favor of this request. Mr. Light submitted for the record copies of letters (see Exhibit 1) received in favor of the request from Arthur & Roselle Green, Deane

and Elizabeth Poore, Daniel Childress and Shawn Murray. Mr. Costello stated that Staff will verify that their addresses are in Boone County. There being no one present who wished to speak in support of the request the Chairman asked if there was anyone present who wished to speak in opposition.

Mr. Wendell Brown, 12228 Percival Road, Walton, stated that the people who submitted the letters are the owners of the industrial property next door and they want to develop their property as residential too. He stated that Drees owns the property behind this property and they will develop that property too. He stated that this is a beautiful area. He stated that only forty acres of this property is in Boone County and Kenton County has declined this zone change. He stated that the applicant is proposing 4 – 8 houses per acre and there will be thousands of houses if you include the Drees property and the properties next door. This will not blend into the community. An example of “blending” is the Adams farm with five, ten, and twenty-acre-acre lots. He stated that he is a longtime resident, and the new neighbors did not move there to have a huge subdivision in the area. They want the rural atmosphere. They do not want crowded schools and roads. He stated that the back of this subdivision comes out onto Percival Road, which is a one-lane road with *Watch Out for Horses* signs and kids riding bicycles on it. He stated that there will have to be a large road built there. He stated that the industrial zoning retains the rural atmosphere and is preferable to this large amount of houses. He stated if these were going to be five-acre lots that blended into the community, they would not be here. He stated that the developer may decide to make all of the lots 50-foot frontages. He stated that it would be best to keep the area agricultural and let the subdivisions grow from where they are now. What is proposed is an unnecessary change of the atmosphere and way of life. He asked that the request be denied.

Ms. Sherry Carran, 927 Forest Avenue, West Covington, stated that she spoke at the Kenton County public hearing. She also spoke at the 2001 meeting in Kenton County when they were looking at this area to get an industrial base to bring in money for their budget. She told them that they need to consider agriculture as a way of bringing money into the county. She stated that agriculture is a land use that has a benefit. She stated that many people consider agricultural land as land waiting to be developed, but that not the case. She submitted a copy of a letter she submitted to Kenton County Fiscal Court in 2001 (see Exhibit 2). She reviewed the information she submitted to Kenton County and stated that we are losing our agricultural land. She stated that this is highly productive agricultural land. There are productive farms on the land to the west of this site in Kenton County. She stated that we need to find ways to save land that is still in agricultural production and benefiting the county. She reviewed the 1995 Kenton County Comprehensive Plan and the highlighted comments in her letter to Judge Murgatroyd and Commissioners (see Exhibit 2). She stated that she mentioned “Cost of Community Service” Studies (see Exhibit 2) to Kenton County Fiscal Court. She has served on the Kenton County Conservation District and has been involved with farmland issues. She is the Marketing Manager for the Northern

Kentucky Regional Farmers' Market in Covington. She stated that they received a grant from the Greater Cincinnati Foundation to do Cost of Community Services Studies and they have completed one in Butler County, Ohio (see Exhibit 2). She stated that these studies show that agricultural land brings in a fiscal surplus that counties need to balance their budgets. She stated that agriculture should be considered as a positive land use for Boone County. She stated that if the property is going to be changed, industrial would be a better change. She stated that light industrial has less impact on existing adjacent farmland and would be a more compatible land use. She stated that there was an article in the newspaper a couple of weeks ago that one in every five jobs in Kentucky is agriculture related. She stated that the Boone County farmers market is growing and there is a need for fresh locally grown produce. Ms. Carran reviewed and submitted *Why Smart Growth: A Primer* (see Exhibit 2).

Mr. Mark Petticord, 523 Walton-Nicholson Road, stated that his property adjoins the subject property and is located in Kenton County. He did not receive a letter as an adjoining owner, but he got word of the meeting. He stated that he would not care to have an industrial park in his back yard, but the industrial traffic would be less than the traffic from a thousand houses. He stated that the City of Walton has a tight school system and it is hard to get in, even for the people living in the City of Walton. The schools are overcrowded and even with a new school going in he does not know how the schools would support all of these houses. He stated that Walton-Nicholson Road currently has septic systems and questioned the sewer system for the proposed houses. He stated that he would like the property to remain agricultural at one house per acre, rather than having four houses per acre. He has lived on his property for fifteen years and has 8.5 acres – it is nice country living and he does not want to see it go away.

Mr. Light submitted a letter received in opposition from Charles, Viola, Carolyn and Joan O'Donnell (see Exhibit 3).

Mrs. Kegley stated that the City of Walton has annexed property in Kenton County. She stated that she believes people living in Kenton County and paying taxes in Kenton County would go to school in Kenton County. She stated that some of the lines are in the middle of lots and questioned what that would mean in regard to the school system. Mr. Costello responded that the Walton-Verona School District has district boundaries and the boundaries go beyond the city limits. He noted the county line within some of the lots and stated that it is not just an issue of the School District, but also the Fire District. He stated that there has been some discussion of realigning the lots so that they are either in Kenton County or in Boone County. He stated that the lots in Boone County would be served by Walton-Verona School District.

Mr. Berling stated that the Walton-Verona School District had some concerns about this development and they met with the School District two or three times after they wrote the letter (see letter dated June 28, 2005 from Bill Boyle,

Superintendent, Walton-Verona Independent Schools which is attached to the Staff Report). Mr. Berling stated that they will make every effort to have the property lines coincide with the county line which will avoid the property owners have two tax bills. He stated that Walton-Verona School District boundaries go to the county line regardless of the city limits and the children in this development will go to two different school districts. He stated that they did longer cul-de-sacs in Wildcat Run to get bus service and they are doing a 90-foot cul-de-sac rather than the normal 60-foot cul-de-sac in this development. He stated that one of the attractions of Walton is the Walton-Verona School District and they will work with the school district.

Mr. McMillian questioned why the lots are so much smaller in Boone County than in Kenton County. Mr. Berling responded that they have changed that.

In response to a question from Mrs. Poston, Mr. Berling stated that the development will be on city sewers or it will not happen. He stated that there will be a central system and there will be treatment. He stated that there will not be septic systems, there will not be individual units – it will be a central sewer system.

Mr. Berling stated that the lots sizes were done without thought of county line – they were working with the topography. He stated that this was mentioned by the School District and the lots are now more evening distributed – which they will show when they come back with the plan. Mr. McMillian asked if the lots in Boone County are a lot bigger. Mr. Berling responded “yes” and stated that they estimate there will not be more than three houses to the acre. He stated that they have no frontage on Percival Road, but they have shown a road worthy of being called a north/south connector road and they will probably tie into Percival Road at some point. He stated that they met with Bill Boyle (Superintendent, Walton-Verona Independent Schools) and he was happy with the revisions. They will meet with Bill Boyle again. Chairman Caddell stated that the Planning Commission has not received any follow-up letters from Walton-Verona School District.

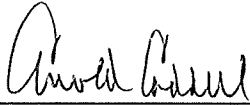
Mr. McMillian questioned why there are no recreation areas for that many houses. Mr. Berling responded that there is open space and there are community facilities with a shelter and a pool. Mr. Light indicated the open space on the Power Point slide.

Mr. Carmichael asked if the applicant wants to amend the request from SR-2 to SR-1 since the applicant indicated that there will be three houses per acre. Mr. Berling responded “no” and stated that SR-1 would not allow less than 65-foot lots, but with SR-2 they can have 50-foot lots and 100-foot lots and have the flexibility to do a mix. Mr. Carmichael asked if they would be willing to accept three houses per acre as a condition of the zone change. Mr. Berling responded “yes”.

Mr. Wendell Brown stated that the Walton-Verona School District is great because it is small – but with this development and so many more houses, it will just be another school district.


There being no further comments, the Chairman stated that the Committee Meeting for this item will be on August 24, 2005 at 5:00 PM. This item will be on the Agenda for the Business Meeting on September 7, 2005 at 7:00 PM. The Chairman closed this Public Hearing.

APPROVED:



Arnold Caddell, Chairman

Attest:



Jan Hancock, Recording Secretary

Exhibits –

- 1. Letters from Arthur & Roselle Green, Deane and Elizabeth Poore, Daniel Childress and Shawn Murray submitted by Staff**
- 2. Submitted by Sherry Carran: (1) letter from Ms. Carran to Judge Murgatroyd and Commissioners dated March 20 2001, (2) letter from Ms. Carran to Kenton County Fiscal Court dated May 31, 2001, (3) copy of *Smart Growth America*, (4) *Cost of Community Services Study, Butler County, Ohio* – prepared by American Farmland Trust, December 2004, (5) *Farmers Market Growth*, and (6) *Why Smart Growth: A Primer* by International City/County Management Association**
- 3. Letter from Charles, Viola, Carolyn and Joan O'Donnell submitted by Staff**

August 02, 2005

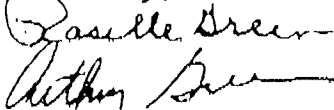
TO BOONE COUNTY PLANNING AND ZONING:

This is to inform you of our concerns regarding the development of the Anderson and Hance farm located on Walton-Nicholson Pike in Boone County. My wife and I have been neighbors and friends of them for forty years since our property backs part of their property in Kenton County.

We are certain this development will be a great asset to the community and the surrounding county by bringing in new businesses, such as a much needed grocery store in the Walton area.

Again, my wife, Roselle, and myself, Art, are pleased with this upcoming development and with the growth it will bring to this neighborhood.

Sincerely,



Arthur & Roselle Green

12810 Percival Rd.

Walton, Ky 41094

August 1, 2005

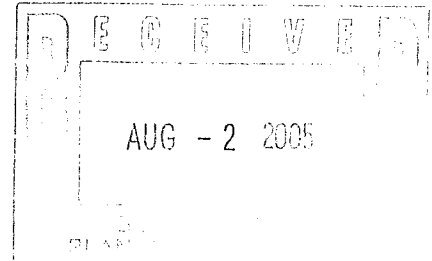
Boone County Planning and Zoning,

We would like to give our support for the proposed rezoning project on the Hance - Anderson farm on Ky. 16. We believe it will be good for our community and school systems. We feel it could help revitalize our downtown business district and with good growth, it would create new business and possibly support a full service super market, dry cleaners, etc. of which we have a real need.

Thanks for your consideration,
Sincerely,
Deane and Elizabeth Poore
31 Alta Vista Dr.
Walton, Ky.

Daniel E. Childress
1680 Walton Nicholson Pike
Walton, KY 41094
859-356-9862

August 2, 2005



Mitchell Light, Assistant Zoning Admin.
Boone County Planning Commission
2985 Washington Street
Burlington, KY 41005

Re: Industrial Development -- Hwy. 16 -- Kenton-Boone County Line

I am an owner of three residential parcels of property on Ky. 16 in Kenton County. I also own a parcel of business property in Kenton County on Ky. 17. In addition to that I own a parcel of business property on Ky. 16 in Boone County, located in the North Walton Business Park.

All my property on Ky. 16, in Kenton County, and all my property in Boone County on Ky. 16, is very close to the Hance property. It is my understanding that an application to rezone this parcel to residential is under consideration.

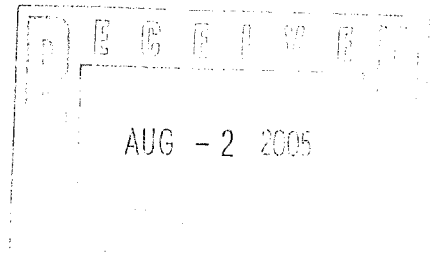
Being part of the North Walton Business Park for the last few years, I don't see any real potential for industrial growth with this park. I see too many industrial areas in the works on Ky. 25 between Walton and Richwood. I also see Ky. 16, east of North Walton Industrial Park, requiring major road improvement for heavy truck usage. When I-75 is shut down and traffic is detoured to Ky. 16, it becomes a very dangerous road with no room for error. For example, Ky. 16 (Walton Nicholson Pike) has a double yellow line for its entirety.

Being a resident, a property owner, and a business owner within walking distance of the Hance property, I am in favor of a zoning change for this property to residential.

Regards,


Daniel E. Childress

Shawn Murray
12620 Percival Road
Walton, KY 41094
859-359-4073



August 2, 2005

Mitchell Light, Assistant Zoning Admin.
Boone County Planning Commission
2995 Washington Street
Burlington, KY 41005

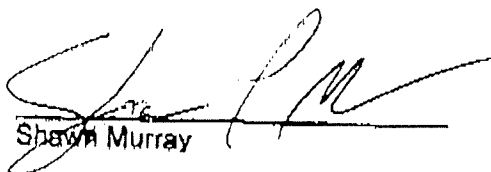
Re: Industrial Development -- Hwy. 18 -- Kenton-Boone County Line

It has come to my attention that the Hance property may be rezoned. I am the owner of a residential parcel of property on Percival Road in Kenton County that backs up to the Hance property. I also own a parcel of business property on Ky. 16 in Boone County, located in the North Walton Business Park.

As an owner of property in the North Walton Business Park, I don't see any real potential for industrial growth in this vicinity. I feel there is an excess of industrial developments in this area.

It is my opinion that the Hance property is better suited for residential zoning. Being a resident, a property owner, and a business owner close to the Hance property, I am in favor of a zoning change for this property to residential.

Regards,



Shawn Murray

Tuesday, March 20, 2001, Public Meeting

Judge Murgatroyd and Commissioners Black, Humpert, and Koenig,

Part of the responsibility of the Kenton County Conservation District is to educate the public about sound land use activities and to promote good stewardship of our natural resources. We rely on giving information and technical assistance to carry out our duties. The reason I'm here is to give maybe some added input on the zone change being considered tonight so that an informed decision may be made.

In considering this zone change there are 3 land uses that need a closer look:

- ... Industrial
- ... Agricultural
- ... Recreation/Open Space

The 1995 Comprehensive Plan for Northern Kentucky states:

- Industrial type development should be based on area-wide consideration resulting in utilization of the most suitable and desirable land and location of employment centers, which would be accessible to the greatest number of persons.
- Land, which is most advantageous for industrial development, should contain the following characteristics:
 - ... Good access to major transportation
 - ... Good proximity to urban development (employment sources)
 - ... Relatively flat land
 - ... Full range of urban services
- Land, which can be best used for industrial purposes, should be identified and reserved for industrial use and encouraged to be used only for such purposes.

Then we have Agriculture as a land use. In the information passed out there is a map of important farmland in Kenton County. This map is dated 1984. When you give this map a closer look you will realize that a lot of this land is no longer farmland.

Disappearance of farmland near major cities has become an issue of national importance. A 1997 report by U.S. Dept. of Agriculture stated that between 1982-92 Kentucky lost 36,280 acres of farmland and greenspace each year to development. Between 1992-97 that figure almost doubled with a loss of 70,820 acres each year. For the five year period 1992-97 Ohio was 10th in the nation with a loss of 521,220 acres. Kentucky was 14th with a loss of 354,100 acres. Indiana was 25th with a loss of 274,400 acres.

The area to be rezoned contains a substantial amount of prime and important farmland and some of this land has been formed into Agricultural Districts. When land is in an Agricultural District it is the state law that governments consider the impacts of their actions on agricultural lands and search out alternatives to converting farmland for other uses.

These figures have been amended see back page

The 1995 Comprehensive Plan states that production and employment in the agricultural sector is an important part of Northern Kentucky's economy. Further study may show how important.

Communities often evaluate the impact of growth on local budgets by conducting fiscal impact studies. These studies project public cost and revenues from different land development patterns. They generally show that residential development is a net fiscal loss for communities and recommend commercial and industrial development as a strategy to balance local budgets. These fiscal impact studies rarely consider the fiscal contribution of farm, forest and recreational lands, which are very important to rural economies.

There is a study called a Cost of Community Service Study which is inexpensive, easy-to-understand way to determine the net fiscal contribution of different land uses to local budgets. These studies usually show that agricultural land is similar to other commercial and industrial uses. According to the American Farmland Trust, in every community studied, farmland has generated a fiscal surplus to help offset the shortfall created by residential demand for public services.

Communities must balance goals such as maintaining affordable housing, creating jobs and conserving land and resources. With good planning, these goals can complement rather than compete with each other. Cost of Community Services Studies give communities another tool to make decisions about their futures.

The last land use is Open Space / Recreation. This land use seems to be top priority according to the 1995 Comprehensive Plan. It is recommended that sufficient land be reserved for recreation, including parks and open space. Undeveloped hillsides and stream valleys are considered open space.

According to the 1995 Comprehensive Plan, open spaces are important for our community and form an integral part of our natural landscape. They provide the aesthetic beauty that defines Northern Kentucky and serve as important environmental areas such as floodplains, wildlife habitats and buffer zones.

In the information passed out there is a map of the Banklick Creek Watershed Project proposed in 1971. This was a project considering the creation of several areas like Doe Run Lake. This map is not being presented to say this project should or should not happen but to point out the areas that are important for watershed protection and to control flooding of the Banklick Creek. The one area is the Wolf Penn Creek area, which is located in the area being considered tonight. If this area is developed it could compound the flooding problems of the Banklick Creek downstream and could degrade the adjacent streams and habitats.

If this area were left as Agriculture it would be considered Open Space. The areas around

the upper Banklick Creek and Wolf Penn Creek could be then considered for Riverwalks and Bikeways as proposed by the 1995 Comprehensive Plan. This proposal was part of the Area -Wide Parks Plan. (See Map 6 H of the 1995 Comp. Plan)

Area-Wide Parks are the foundation of the park-link system which was proposed in the 1972 Comprehensive Plan. Purpose of the park-link system is to connect existing and proposed parks, historic sites and districts, and scenic areas with hiking trails, bike paths and pedestrian walkways along streams and rivers.

In summing up:

- ... Good soils and streams are not needed for Industrial land use.
- ... Farming can only occur on good soils.
- ... Open Space and passive Recreation is the most pleasing along scenic areas with rivers and streams.

The Kenton County Conservation District hopes Fiscal Court and Area Planning take a closer look at this proposed zone change. The Conservation District is willing to help in any way.

“We abuse land because we regard it as a commodity belonging to us. When we begin to see land as a community to which we belong, we may begin to use it with love and respect.” - Aldo Leopold

Thank you,
Sherry Carran
Kenton County Conservation District, Board Member

May 31, 2001

To: Kenton County Fiscal Court

Regarding: Public Meeting, March 20, 2001, on proposed zone change of the Upper Banklick Creek Area

Dear Judge Murgatroyd and Commissioners Black, Humpert, and Koenig,

I would like to amend some figures I quoted in my comments on the proposed zone change of the Upper Banklick Creek Area. Just recently, I discovered that the 1997 National Resources Inventory has been revised. I enclose a copy of Natural Resources Conservation Service's explanation.

I also enclose a copy of my comments made at the public hearing. I have highlighted the figures that should be revised. The highlighted area should now read as follows:

A 1997 National Resources Inventory conducted by the USDA's Natural Resources Conservation Service (revised December 2000) states between 1982-92 Kentucky lost 35,500 acres of non-federal land each year to development. In the 5-year period between 1992-97 that figure is almost 1-1/2 times greater than the previous 10-year period, with a loss of 47,400 acres each year. For the 5-year period between 1992-97:

... Ohio was 8th in the nation with a loss of 364,800 acres of non-federal land to development (219,000 of those acres were agricultural according to the American Farmland Trust (AFT))

... Kentucky was 16th with a loss of 237,000 acres (164,000 of those acres were agricultural (AFT))

... Indiana was 23rd with a loss of 195,300 acres (144,000 of those acres were agricultural (AFT))

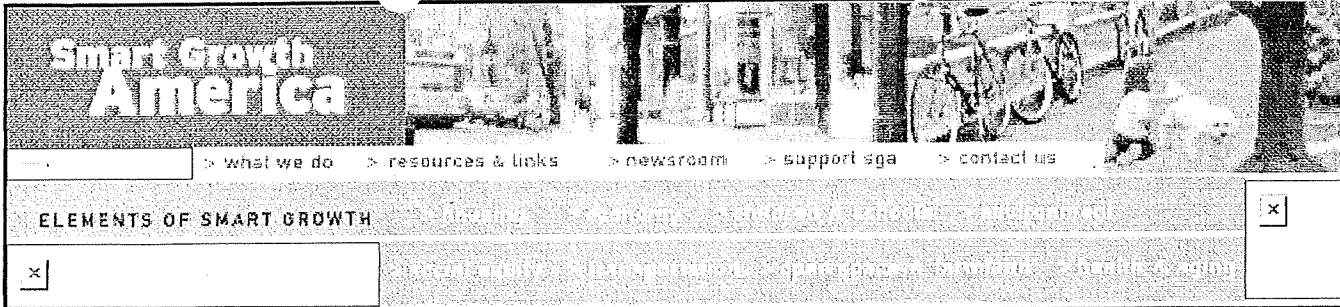
I wanted you to have the revised statistics.

Sincerely,

Sherry Carran, Board Member
Kenton County Conservation District

Enclosures - 2

cc: Northern Kentucky Area Planning



Smart Growth America

what we do > resources & links > newsroom > support sga > contact us

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 [Smart Growth and the Environment](#)
 [Smart Growth and Transportation](#)
 [Smart Growth and Economic Development](#)
 [Smart Growth and Quality of Life](#)
 [Smart Growth and Land Use](#)
 [Smart Growth and Community Design](#)
 [Smart Growth and Public Policy](#)
 [Smart Growth and the Future](#)



NEWS SOURCES

[Land Trust Alliance Newsroom](#)

[Trust for Public Land](#) email alerts

RECENT REPORTS

[Farming on the Edge](#)

RESOURCES & CLASSIC REPORTS

Translation paper: [Parks, Greenspace, and Land Conservation and Saving Farmland](#)

PARTNER ORGANIZATIONS

[American Farmland Trust](#)

[Land Trust Alliance](#)

[The Biodiversity Project](#)

[The Conservation Fund](#)

[Alliance for Transportation Research](#)

Open Space & Farmland

A core goal of smart growth is to encourage and attract investment into existing communities, and to ensure that residents in those communities have access to parks and recreational opportunities that make neighborhoods more enjoyable.

In the process, smart growth preserves farmland, rangeland and open space in rural areas by decreasing the pressure to develop there. The opposite is also true. Programs to preserve open space and farmland can aid efforts to direct growth into existing communities, protect the environment and make communities more livable. Read on to find out more about the relationship between sprawl, smart growth, and open space and farmland preservation.

[SPRAWL AND LAND CONSUMPTION](#)

[SMART GROWTH AND OPEN SPACE AND FARM PRESERVATION](#)

Sprawl and Land Consumption

In October 2002, American Farmland Trust released a report, *Farming on the Edge: Sprawling Development Threatens America's Best Farmland* that found that between 1992 and 1997, the U.S. paved over more than 6 million acres of farmland, an area approximately the size of Maryland. Americans developed twice as much farmland in the 1990s as in the 1980s, and we are losing high quality farmland – the land best suited for growing food – the fastest.

However, the most disturbing finding was that inefficient land use rather than economic growth was to blame for the trend. From 1982-1997, the U.S. population grew by 17 percent, while urbanized land grew by 47 percent. Over the past 20 years, the acreage per person for new housing almost doubled, and since 1994, 10-plus acre housing lots have accounted for 55 percent of the land developed.

Economic Challenges The loss of farmland and open space often causes unexpected economic challenges for rural communities. In these communities, farmland, forests, ranch land and open space tend to be the economic drivers that attract businesses, residents and tourists. Sprawling development compromises the resources that are the core of the community's economy.

At the same time, sprawling development rarely brings about the economic benefits anticipated. While it is true that an acre of land with a new house generates more total revenue than an acre of hay or corn, the cost of providing infrastructure and services to that property is greater for residential development than for commercial, farm, or forest land. Cost of Community Services (CCCS) studies conducted in more than 83 communities show that owners of farm, forest and open lands

pay more in local tax revenues than it costs local government to provide services to their properties. Residential land uses, in contrast, are a net drain on municipal coffers: **It costs local governments more to provide services to homeowners than residential landowners pay in property taxes. ([Cost of Community Services Fact Sheet](#)).**

One land use is not by itself better than another, however, understanding the benefits and costs of different types of development can be helpful in comparing and evaluating alternative growth strategies that may include a mix of different land uses, or simply concentrate on one. COCS studies are also a useful tool for land preservation advocates, who need to dispel the myths that residential development automatically leads to lower taxes, and that farmland must be developed to ensure a community's continued fiscal stability.

Smart Growth and Open Space and Farmland Preservation

Smart growth is an approach to development that concentrates on investing in existing communities. By directing growth to communities where people already live and work, smart growth limits the amount of farmland and open space that is developed, makes existing communities more attractive -- with a mix of housing, restaurants, parks, cafes, and jobs, and minimizes the need for new water, sewer and road infrastructure that increase taxpayer burdens.

For rural communities, smart growth means supporting town centers and Main Streets, and attracting and encouraging growth and investment in and around these centers and within existing communities, preserving the character of rural towns. In contrast, sprawling development in rural, suburban and urban areas is auto-oriented, single use development -- frequently along or at the intersection of nearby highways -- that draws economic activity out of downtowns, damaging their vitality and dramatically increasing infrastructure needs. Smart Growth, in contrast, simultaneously preserves open space and farmland while ensuring that there is an adequate supply of housing for families with a mix of incomes. Smart Growth provides residents with a mix of shops, offices, restaurants, and other services that they can get to by automobile, bus, bike or foot.

Economic Benefits Communities across the country have found that protecting open space, parks and farmland is a strategy that can be used to strengthen existing communities, attract businesses, and avoid the costs of urban and suburban sprawl. As part of a package of smart growth programs and policies, communities that offer a high quality of life including well-maintained neighborhood parks and extensive park systems consistently attract and retain businesses. For example, Portland, Oregon, which adopted extensive growth management practices beginning in the 1970s and invested in an extensive park system, has attracted numerous new companies, including Hewlett-Packard, Intel and Hyundai, which picked the city because its quality of life would be able to attract an educated workforce. "According to Bill Calder, a spokesman for Intel, the computer chip manufacturer that has nearly 9,000 employees in Oregon, 'Companies that can locate anywhere they want to will go to places that attract good people.'" For more info [click here](#).

Agriculture contributes to local economies directly through sales, job creation, support services and businesses, and by supplying lucrative secondary markets such as food processing. In many rural areas, tourism is a major industry that supports local economies, and as discussed earlier, farmland and open space impose significantly fewer costs on local governments.

■ For more information on the economic benefits of open space, and parks, [click here](#).

■ For more information on the economic benefits of farmland preservation, [click here](#).



**Cost Of
Community
Services
Study**

Butler County, Ohio

Prepared by American Farmland Trust
for the Smart Growth Coalition for Greater Cincinnati and Northern Kentucky
December 2004



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*The OKI and Greater Cincinnati regions include Butler, Clermont, Hamilton and Warren counties in Ohio; Boone, Kenton and Campbell counties in Kentucky; and Dearborn County in Indiana.

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American Farmland Trust (AFT) is a private, nonprofit conservation organization founded in 1980 to protect our nation's strategic agricultural resources. AFT works to stop the loss of productive farmland and to promote farming practices that lead to a healthy environment. AFT provides a variety of services to landowners, land trusts, public officials, planners, agricultural agencies and others. Services include Cost of Community Services studies, workshops on farmland protection and estate planning, farmland protection program development and agricultural economic analysis.



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**Butler County, Ohio
Cost of Community Services Study**

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EXECUTIVE SUMMARY

Butler County is located in the southwest corner of Ohio, between the urban centers of Cincinnati to the south and Dayton to the north. In the past half century, its population more than doubled to bring it to nearly 340,000 today. Accompanying this growth is development and a shrinking agricultural base. Over the past 20 years, Butler has lost 200 farms. Just in the past five years, its land in farms has dropped by more than 6,000 acres. These changing land use patterns affect the size and extent of public services demanded by a growing population base. County officials need to understand the benefits and costs of different types of development in order to compare and evaluate alternative growth strategies. Part of this understanding will be the realization that farmland is not undeveloped land but is land that is contributing to the economy and character of the county, and that it should be considered and supported when making policy about land use.

The Smart Growth Coalition for Greater Cincinnati and Northern Kentucky contracted with American Farmland Trust (AFT) to conduct a Cost of Community Services (COCS) study in Butler County to compare the net fiscal impacts of farm/open land uses to residential and commercial/industrial land uses. AFT analyzed the revenues generated by each of these land uses and compared them to the expenditures of each land use for county services.

The COCS analysis was based on budgets, audited financial statements, departmental reports and interviews with governmental officials about county revenues and expenditures. County services include education, public health and safety, public works, local government and courts. The time periods investigated included two overlapping fiscal years: 2002 (January 1 to December 31, 2002) for all services except public education and 2003 for public education.

The findings present a snapshot in time of revenues versus costs of providing services to Butler County's major land uses. They show:

- 85 percent of total county revenue was generated by residential land uses, 13 percent by commercial/industrial land uses, and 2 percent by farm/open lands.
- 93 percent of expenditures were used to provide services to residents, 6 percent for services to the commercial/industrial sector and 1 percent for farm/open lands.
- For every \$1 of revenue generated by the residential sector, \$1.12 was spent to provide county-level services to residents.
- For every \$1 of revenue generated by commercial/industrial land uses, 45 cents was spent to provide county-level services to businesses and industries.
- For every \$1 of revenue generated by farm/open lands, 49 cents was spent to provide county-level services to farm and undeveloped lands.

These findings show that farm/open and commercial/industrial land uses are important to Butler County's fiscal equilibrium. Together they help offset the shortfall associated with providing county-level services to residential development. The findings suggest that because agricultural land uses makes a positive net contribution to county coffers, protecting farmland and supporting the county's agricultural base can provide long-term fiscal benefits to the county.

INTRODUCTION

Butler County is located in southwestern Ohio and contains 468 square miles. Most of the county is located within a one-hour drive from the nearby metropolitan centers of Cincinnati to the south and Dayton to the north. According to the U.S. Census in 2000, Butler County had a population of 332,807 and ranked eighth in population of Ohio's 88 counties.

The population of Butler County increased steadily over the last 50 years. Between 1950 and 2000, it more than doubled from 147,203 to 332,807 people. This growth is expected to continue, as the county's 2001 Land Use Plan projects the 2020 population to be near 412,060.

Agriculture is a significant industry in Butler County, recording \$35 million in sales in 2002. Grains, including corn and soybeans, represent the largest crop at \$11.6 million. Indicative of an urbanizing area, the nursery and greenhouse industry is rapidly expanding and now ranks second at \$10.7 million, with cattle and dairy products remaining as the other significant industries with \$3.2 and \$1.7 million in sales respectively in 2002.

However, the amount of cropland¹ in the county declined significantly between 1997 and 2002, falling from 111,728 acres to 105,505 acres—a decrease of 6,223 acres.² The amount of land enrolled in Ohio's Current Agricultural Use Valuation Program also has been steadily decreasing. From 1985 to 2001, enrollment decreased by 2,067 acres per year or 18 percent overall. Another indicator of the decline in agriculture is the loss of farms. Between 1980 and 2001, Butler County lost 200—or 17 percent of its remaining farms. Left unchecked, the decline could result in the loss of all the county's farmland by the end of the century.

In 1999, the Ohio State University administered a survey to Butler County residents to assess their opinions about farmland preservation. The survey found that 71 percent of those polled agreed or strongly agreed with the statement that it is important to preserve farmland in the county. Only 8 percent of those surveyed disagreed or strongly disagreed. In a follow-up to this survey, the Butler County Land Use Coordinating Committee issued a series of policy recommendations including the formation of an Agricultural Impact Committee, policies that promote growth in non-farmland areas, a purchase of development rights program for the county and a zoning code that promotes agricultural land preservation.

¹ The USDA Census of Agriculture defines land in farms as cropland, woodland, pastureland and rangeland, and other land including ponds, house lots, roads, wasteland, etc.

² Data were released as a part of the 2002 Census of Agriculture. For the first time, the National Agricultural Statistics Service (NASS) adjusted the data to account for farms missed or misclassified during the previous census. NASS measured the incompleteness of the census mailing list (CML) by interviewing each producer identified on randomly selected sample tracts and comparing this information to the CML. Census data were then weighted to approximate data for operations that were not included. As a result of "coverage adjustment" there was an apparent increase in the number of farms, farmers and land in farms from the figures reported in the 1997 Census of Agriculture. More importantly, adjusted figures may not be comparable to the old data. NASS adjusted the 1997 data and presented it alongside the original 1997 data in the Historical Highlights tables for purposes of comparison between the two methodologies. In all other places, 1997 data published in the 2002 Census of Agriculture have been adjusted.

Given the increasing pressures of development, the Smart Growth Coalition for Greater Cincinnati and Northern Kentucky, with funds from the Greater Cincinnati Foundation, contracted with American Farmland Trust (AFT) to conduct a Cost of Community Services (COCS) study to help them gain a better understanding of the relative fiscal contributions of Butler County's agricultural lands.

WHAT IS A COST OF COMMUNITY SERVICES STUDY?

COCS studies are a case study analysis of the average local budgets. They provide a snapshot in time of revenue service demands. COCS studies are descriptive—not predictions for a specific community in a recent time period—they analyze the impacts of farm and other open lands on local budgets. The findings provide the benefit of hindsight into current land use and development.

AFT developed the COCS approach to investigate three meetings. The findings of more than 100 COCS studies have dispelled these myths:

1. Open lands—including working agricultural and forest lands—are an inefficient land use and should be developed to their "highest and best use."

Findings prove that keeping farm and forestland productive is a viable economic use of the land. Studies find that farm, forest and open land have a modest demand for services, and therefore require a low level of expenditures from local government. In addition, agriculture and forestry provide numerous economic and environmental benefits. Therefore, keeping land open is often the best use from a fiscal, economic and environmental perspective.

2. Farmland gets an "unfair" tax break when enrolled in current use programs, such as Ohio's Current Agricultural Use Value Program (CAUV).

Ohio's CAUV taxes land that is actively used for farm or forestry at its use value rather than its market value. Because of the modest demand of farm and forestland for public services, COCS findings show that most of these programs tax open land at a fair value based not only on the land's current use but also on its modest cost to the community.

3. Residential development will lower property taxes by increasing the tax base.

Residential development contributes revenue to the tax base through property and other taxes, but it also increases municipal costs for services such as public safety and education. When these costs are taken into account, COCS findings consistently show that, on average, residential development does not pay for itself.

*Walton Mayor
Phil Trzop
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Jim Carmichael*

AFT follows three basic steps in the process of conducting a COCS study:

1. Collect data: Obtain relevant reports and other financial records, interview officials, and representatives of boards and departments.
2. Allocate revenues and expenditures by land use.
3. Analyze data and calculate ratios.

In other words, first AFT gathers information about county revenues and expenditures, then it allocates them to defined land use categories, and finally analyzes revenues and expenditures to determine the net fiscal impact on the basis of land use demand for services. Allocations are based on audited county financial statements, local budgets, departmental reports and probing interviews with local governmental officials to determine how revenues were generated and appropriations spent during a recent fiscal period. Ultimately, the fiscal relationship between revenues and expenditures for each land use category can be expressed in ratios.

The following section explains how these steps were followed in Butler County.

COCS PROCESS IN BUTLER COUNTY

AFT contacted key public officials to understand local issues related to budgets and to define land use categories for the study. Based on local input, AFT decided to use financial statements from the most recent fiscal years with closed books for the General Fund and other entities involved in countywide services (Appendix). The county's fiscal year coincides with the calendar year. AFT used the most recent audited financial statements available when the study began, which were from fiscal year 2002.

After a review of the county property tax classification system and the CAUV, three land use categories were defined for this study:

- ***Residential Land Uses*** – property used for dwellings, *including farmhouses* and the one-acre “homesite” they occupy, apartments, townhouses, condominiums and vacant residential parcels of less than ten acres.
- ***Commercial and Industrial Land Uses*** – property actively used for business purposes other than agriculture or forestry, including retail and wholesale production, utilities, and vacant commercial and industrial parcels of less than 10 acres.
- ***Farm and Open Land*** – property used or designated as farmland, woodland or open land. The minimum acreage for open land or vacant land was based upon the CAUV minimum acreage requirement. To qualify for CAUV in Ohio, parcels must be at least 10 acres. Therefore, any privately held land of 10 acres or more without development was categorized as open land.

Table 1 provides an overview of what is included in each category:

OHIO LAND USE CATEGORIES		COCS LAND USE CATEGORIES		
Use Code	Description	Residential	Commercial/ Industrial	Farm & Open Land
100 – 199, 390, 502 – 505, 800	Properties receiving a Current Agricultural Use Valuation	Farm houses and one acre of land, farm buildings		Farmland & farm buildings
200 – 380, 399, 416 – 499, 810 – 880	Commercial/ Industrial properties		All parcels with buildings and vacant parcels < 10 acres	Vacant parcels ≥ 10 acres
401 – 403, 415, 500, 501, 510 – 599	Residential properties	Houses and land for properties ≤ 11 acres; houses and 1 acre of land for properties ≥ 11 acres		Vacant parcels ≥ 10 acres; excess land on parcels with houses ≥ 11 acres

1. COLLECT DATA

The study was conducted at the county level and focused on the county General Fund, Special Revenue Funds and public schools. All countywide public services that received property tax allocations from the auditor's office were included. Public education is organized by district, but the services are available throughout the county and since schools receive property tax contributions, they were included in the study. AFT analyzed the entire service budget for every school district serving Butler County residents, including state and other financial assistance. However, township-level services were not included in the study, including fire and EMS.

The Butler County General Fund supports many county-level services including sheriff, regional planning, public works, financial management, administration and others. Special Revenue Funds provide the balance of countywide services (with the exception of public schools) including health and human services, water and sewer services, and road and bridge construction. AFT interviewed county officials and department heads to help tease out subtleties in the varying demands for services by land use category as well as how revenues coming into the General Fund were spent by land use category. Tax-exempt lands owned by government or other qualifying organizations were not included in the study.

The following are the five key materials gathered and reviewed to conduct the analysis:

1. 2004 assessed property values broken down by land use category;
2. Butler County Comprehensive Annual Financial Report, Fiscal Year 2002;
3. Traffic counts from the Ohio Department of Transportation;
4. Vehicle license and registration information from the Ohio Department of Public Safety;
5. School District Comprehensive Annual Financial Reports, Fiscal Year 2003, from the Ohio Auditor of the State.

2. ALLOCATE REVENUES AND EXPENDITURES BY LAND USE

After reviewing financial data and conducting interviews, AFT allocated revenues and expenditures to the defined land use categories. In addition to the General Fund and several Special Revenue Funds, Butler County allocates property tax revenues to 16 different school districts and three joint vocational schools.

General Fund and Special Revenue Funds allocations were based on the sources of revenues and the recipients of services. Most court revenues were assigned the fallback percentage (see below), as there was insufficient data available for a full analysis, except for juvenile courts, which were assigned to residential land use. Expenditures by the sheriff's office were allocated according to the function and size of each division within the office, and split among the three land use types. Most health and human services were allocated to residential. The Department of Development spent nearly equal amounts on residential and commercial/industrial land uses and a smaller portion on farm/open lands.

The county's Motor Vehicle Special Revenue Fund is funded primarily through vehicle registration fees and the gas tax. The Ohio Department of Public Safety provided information about residential, commercial and farm vehicle registration and license fees for the county. Revenues from the fees were allocated to the land use categories in proportion to vehicle type. Passenger cars, motor homes, motorcycles, and mopeds were classified as residential, most trucks as commercial/industrial and farm trucks as farm and open land. Expenditures from this fund and other funds that were used to finance road and bridge construction were based on traffic counts broken down by vehicle type from the Ohio Department of Transportation.

In the case of the General Fund and several of the Special Revenue Funds, fiscal year 2002 expenditures exceeded revenues. Several sources were used by county officials to account for these shortfalls including the fund balance from prior years, proceeds from notes and bonds, and transfers from other funds that carried a surplus in 2002. While this study focuses on fiscal year 2002 expenditures and revenues, some of these other financing sources were included in the study. For example, proceeds from notes or bonds transferred into a fund and surplus funds transferred into a fund with a deficit were included. However, in most cases, these funds do not have a readily accessible association with the land use types used in this study. Therefore, if a connection to a land use could not be determined, the revenues from these other financing sources were allocated among the three land use types in the same proportion as they were expended. For example, 98 percent of Road Improvement Capital Projects Fund expenditures were used for residential development, 8 percent for commercial/industrial development, and less than one percent for farm/open land. These same percentages were applied to the \$6.9 million of notes and advances used to balance this fund's budget.

"Fallback percentages"

Most revenue and expenditure line items could be linked to a particular land use or combination of land uses. In some cases however, sufficient objective information was not available to allocate revenues or expenditures to the defined land use categories. For example, revenues identified as "miscellaneous" or "other" did not have a clear link to any land use type. Additionally, expenditures for administrative salaries and public buildings serve the entire

county in a general capacity. In such cases, “fallback percentages” were used to allocate revenues or expenditures in this study.

To determine these fallback percentages, assessed property values were added together for each category shown in Table 1 and the subtotals were divided by the total of all assessed values. Since countywide assessed values were not available for 2002, assessed values as of June 2004 were used for these calculations. It was assumed that the percentages did not change significantly between 2002 and June of 2004. The resulting fallback percentages were:

- 79 percent of the total assessed value was from residential lands;
- 16 percent from commercial and industrial lands; and
- 5 percent from farm and open lands.

School Districts

Residents of Butler County have access to 16 school districts and three vocational schools. Revenues and expenditures for every school district were obtained for fiscal year 2003 from audited Comprehensive Annual Financial Reports available on the Ohio Auditor of the State’s Web site. Revenues for school services include property taxes, tuition and fees, investment earnings, and state and federal aid.

Tuition and fees and state and federal aid were allocated as a residential land use. Property taxes and investment earnings were distributed to all three land use categories. Due to the considerable variation in the land use composition of the different school districts, a fallback percentage was also calculated for each school district. This was done in order to ensure an accurate estimate of the real estate taxes contributed by each land use category in each school district. The fallback percentages for each school district are shown in Table 2.

School District	Residential Lands	Commercial/Industrial Lands	Farm/Open Lands
College Corner	51%	18%	31%
Edgewood	77%	11%	12%
Fairfield City	82%	16%	2%
Hamilton City	79%	20%	1%
Lakota	80%	17%	3%
Madison	87%	4%	9%
Mason City	100%	0%	0%
Middletown	80%	19%	1%
Monroe City	67%	25%	8%
New Miami	79%	15%	6%
Ross	83%	4%	13%
Talawanda	79%	16%	5%
Northwest	95%	1%	4%
Preble Shawnee	53%	0%	47%
Princeton	47%	52%	1%
Southwest	88%	0%	12%

3. ANALYZE DATA AND CALCULATE RATIOS

Once interviews were completed and the necessary data collected, the information was entered in a computer spreadsheet. The dollar amount for each line item of the budget was allocated to the three land use categories according to the associated percentages. Once the percentages were entered for each line item, total revenues and total expenditures were calculated for each land use category. Then, by comparing total revenues to total expenditures in each category, a surplus or deficit was calculated. This information is presented in a simple ratio that shows the actual expenditure for every dollar raised. The findings were checked for accuracy and analyzed to understand differences in the ratios.

FINDINGS

The findings for each land use category are presented in the table below. The first two rows show the total dollar amounts allocated to each land use for revenues and expenditures. The third row shows the net fiscal impact on the county budget for each land use, which was determined by comparing the revenues generated with the expenditures incurred. The last row presents the findings in ratios that show the contribution or cost of each land use per dollar of revenue generated for the county.

In Butler County, residential land use generated \$791,063,789 in revenues to cover \$887,436,427 million of expenditures, resulting in a \$96,372,638 shortfall. Commercial and industrial land use generated \$119,724,952 in revenues to cover expenditures of \$53,990,271. Farm and open land brought in \$21,299,643 but incurred only \$10,923,541 of expenditures.

TABLE 3: REVENUES AND EXPENDITURES BY LAND USE				
Butler County	Actual	Residential Land	Commercial/Industrial Land	Farm and Open Land
a) Total Revenues	\$932,088,384	\$791,063,789	\$119,724,952	\$21,299,643
b) Total Expenditures	\$951,802,800	\$887,436,427	\$53,990,271	\$10,376,102
Net surplus or (shortfall)	(\$19,714,416)	(\$96,372,638)	\$65,734,680	\$10,923,541
Final land use ratio		\$1 : \$1.12	\$1 : \$0.45	\$1 : \$0.49

The final land use ratios presented in the last row of the table show the expenditures required per dollar of revenue generated. For every dollar of revenue that residential land generated for Butler County, \$1.12 was required for services to local residents. For every dollar of revenue that commercial and industrial land generated for the county, 45 cents was required for services to businesses and industries. For every dollar that farm and open land generated, 49 cents was required for services.

DISCUSSION

Cost of Community Services studies provide a baseline of information to help local officials and citizens make informed land use decisions. They offer the benefit of hindsight on the fiscal

impacts of existing development patterns. Thereby, they provide another piece in the puzzle of the costs and benefits of various community land uses. What makes them unique is that COCS studies specifically address privately owned and managed agricultural and other open lands.

The results of this study demonstrate the importance of agricultural lands to the fiscal stability of Butler County. The county is one of the fastest growing in the state of Ohio and has had to continuously increase the size of government to provide the necessary services to the expanding population. While farm and open lands only contribute \$21.3 million of revenues to county coffers, their net fiscal impact was a positive \$10.9 million. This surplus, along with the surplus generated by commercial and industrial development, helped offset the \$96.3 million shortfall created by residential development.

Farmland is not only important from the fiscal perspective of helping to balance the county's budget, but from an economic one as well. It is the foundation of the agricultural industry, which, in 2002, played an important role in Butler County's economy with more than \$35 million in farm gate sales. Adding to this figure are the support services for agriculture, such as fertilizer and equipment dealers, and downstream industries such as food processors. These are mostly local businesses that rely on the agricultural industry for sales income and inputs. The food and farming system and all its local infrastructure is like an intricate web, providing valuable jobs and income, and underpinning the local economy. It has developed over decades, and the loss of just a few more farms could trigger the closure of multiple businesses closely linked to agriculture.

Much of Butler County's agricultural production comes from field crops that require a large acreage. Farmers growing corn and soybeans typically farm 1,000 acres or more to provide a sufficient family income. The \$10.7 million nursery and greenhouse industry is expanding rapidly, which also requires a large and stable land base as it often takes up to eight years to raise potted plants, shrubs and trees to an ideal size for the marketplace. Beyond the economic benefits of keeping this land in production, these farmers also provide a community benefit by keeping this land as well-managed open space.

The beautiful landscape and scenic views provided by farmland is highly valued by county residents. According to the 1999 Ohio State University survey, seven out of 10 residents agreed that it is important to preserve farmland in the county. Farmland provides multiple non-market benefits to the community such as groundwater recharge, wildlife habitat, traffic control, reducing climate change and staving off sprawl. These quality of life issues are crucial considerations as Butler County plans for its future.

If current trends continue, more and more Butler County farmland will be converted to new residential developments. The results of this study suggest that when farmland is converted to residential use, the tax burden is likely to shift from a land use that contributes significant surplus revenue to one that, on average, falls short of paying for all of the services it requires. Planning is needed both to protect the agricultural infrastructure, direct future growth to areas that can best accommodate new development, accommodate affordable housing and encourage appropriate commercial land uses.

Butler County leaders have a unique opportunity to preserve much of the remaining agricultural land in the county, as well as the agricultural industry. Much of the county's agricultural land lies to the west of the Miami River in an area that remains largely rural. A comprehensive plan for agriculture, one that includes tools to retain the land base and strategies to address economic development of agriculture, would work toward retaining this industry—and way of life—in Butler County. Farmland preservation tools could include both incentive and regulatory approaches, along with strong right-to-farm laws and zoning that allows farmers to conduct a wide variety of agriculture-related operations on their land. Marketing and technical assistance could allow farmers to tap into new and expanding markets and capitalize upon their proximity to nearby urban centers.

COCS findings are descriptive and cannot be used to predict the specific impact of a new development project. However, the pattern of findings in Butler County is consistent with the findings from other nearly 100 other COCS studies in Ohio and around the country. The findings suggest that it would make sense to retain and enhance land uses that fully pay for the services they require and that:

- A balance of land uses, including agricultural and open lands, is needed to supply adequate revenue to pay for community services. Without such a balance, new residential development is likely to create the need for tax increases.
- Current use tax programs, such as Ohio's CAUV are justified as a way to provide an incentive to keep land open and in active agricultural use. Even with a reduced assessed value, agricultural properties contribute a surplus of revenue to pay for public services for residents of Butler County.
- Strategies to retain land in agriculture, such as a Purchase of Agricultural Conservation Easements (PACE) program are good long-term investments in agricultural infrastructure.

The findings of this study show the fiscal benefits that result from farm and open lands, and provide factual information to help residents understand the delicate fiscal balance between land uses. This information should be useful for county leaders and residents when faced with land use decisions now and in the future. In addition to helping maintain fiscal balance, agricultural lands help sustain Butler County's economy and rural character, and help shape the overall quality of life in the region.

The Smart Growth Coalition of Greater Cincinnati and Northern Kentucky, with funding from the Greater Cincinnati Foundation, commissioned the COCS study in Butler County because of the significant "quality of life" contributions of farmland in Butler County, and to make the study available to the citizens and government officials of Butler County to be used as a planning tool to help them in land use policy decision making. According to Edward Thompson, Jr., of American Farmland Trust, "Farmland closest to our cities and towns is among the nation's most productive and important for a variety of economic, environmental and aesthetic reasons. The sustainability of the nation's agriculture is being progressively compromised as this land is lost to sprawling development. The rate of farmland loss is

accelerating as public policies exaggerate the competitive edge that development has over agriculture. He also notes that, “Federal farm policy, in particular, does little to help farmers in urban-influenced areas. States and local communities are leaders in adopting innovative approaches to farmland protection as an integral smart growth strategy.”

With good planning and community support, Butler County can help lead the way.

APPENDIX

General Fund and Special Revenue Funds, Revenue/Expenditures – FY 2002

Butler County Cost of Community Services Study

Actual Revenues

Fund or Entity	Actual	Residential	Comm./Ind.	Farm/Open	Check	Comments
Butler County General Fund (2002)	\$ 65,997,178	\$ 38,023,735	\$ 26,127,437	\$ 1,846,006	\$ 65,997,178	58/40/2
Special Revenue Funds (2002)	\$ 363,080,432	\$ 301,398,297	\$ 53,426,480	\$ 8,255,655	\$ 363,080,432	83/15/2
College Corner School District	\$ 259,823	\$ 202,094	\$ 21,206	\$ 36,522	\$ 259,823	see education sheet
Edgewood School District	\$ 32,282,471	\$ 27,677,907	\$ 2,202,183	\$ 2,402,381	\$ 32,282,471	see education sheet
Fairfield City School District	\$ 64,036,312	\$ 58,214,436	\$ 5,175,001	\$ 646,875	\$ 64,036,312	see education sheet
Hamilton City School District	\$ 81,340,480	\$ 74,370,869	\$ 6,637,725	\$ 331,886	\$ 81,340,480	see education sheet
Lakota Local School District	\$ 148,008,960	\$ 131,542,474	\$ 13,996,513	\$ 2,469,973	\$ 148,008,960	see education sheet
Madison Local School District	\$ 14,252,855	\$ 13,478,035	\$ 238,406	\$ 536,414	\$ 14,252,855	see education sheet
Mason City School District	\$ 696,511	\$ 696,511	\$ -	\$ -	\$ 696,511	see education sheet
Middletown School District	\$ 62,511,190	\$ 56,922,131	\$ 5,309,606	\$ 279,453	\$ 62,511,190	see education sheet
Monroe City School District	\$ 15,597,485	\$ 12,752,034	\$ 2,155,644	\$ 689,806	\$ 15,597,485	see education sheet
New Miami School District	\$ 13,824,792	\$ 13,253,032	\$ 408,400	\$ 163,360	\$ 13,824,792	see education sheet
Ross Local School District	\$ 16,194,639	\$ 15,264,536	\$ 218,848	\$ 711,255	\$ 16,194,639	see education sheet
Talawanda School District	\$ 26,325,847	\$ 22,903,487	\$ 1,053,034	\$ 2,369,326	\$ 26,325,847	see education sheet
Northwest Local School District	\$ 141,322	\$ 137,990	\$ 667	\$ 2,666	\$ 141,322	see education sheet
Priebie Shawnee Local School District	\$ 118,093	\$ 106,441	\$ -	\$ 11,652	\$ 118,093	see education sheet
Princeton City School District	\$ 2,934,105	\$ 1,685,060	\$ 1,225,478	\$ 23,567	\$ 2,934,105	see education sheet
Southwest School District	\$ 881,712	\$ 835,325	\$ -	\$ 46,387	\$ 881,712	see education sheet
Butler County JVS	\$ 23,390,253	\$ 21,430,459	\$ 1,493,176	\$ 466,618	\$ 23,390,253	see education sheet
Great Oaks JVS	\$ 212,015	\$ 167,428	\$ 34,834	\$ 9,753	\$ 212,015	79/16/5 - fallback
Montgomery County JVS	\$ 1,909	\$ 1,508	\$ 314	\$ 88	\$ 1,909	79/16/5 - fallback
total	\$ 932,088,384	\$ 791,063,789	\$ 119,724,962	\$ 21,299,643	\$ 932,088,384	
		85%	13%	2%		

Revenues by land use

Actual Expenditures

Fund or Entity	Actual	Residential	Comm./Ind.	Farm/Open	Check	Comments
Butler County General Fund (2001)	\$ 67,624,810	\$ 56,589,857	\$ 7,671,650	\$ 3,363,303	\$ 67,624,810	84/11/5
Special Revenue Funds (2001)	\$ 386,070,553	\$ 332,739,133	\$ 46,318,621	\$ 7,012,798	\$ 386,070,553	86/12/2
College Corner School District	\$ 259,823	\$ 259,823			\$ 259,823	100/0/0
Edgewood School District	\$ 32,282,471	\$ 32,282,471			\$ 32,282,471	100/0/0
Fairfield City School District	\$ 64,036,312	\$ 64,036,312			\$ 64,036,312	100/0/0
Hamilton City School District	\$ 81,340,480	\$ 81,340,480			\$ 81,340,480	100/0/0
Lakota Local School District	\$ 148,008,960	\$ 148,008,960			\$ 148,008,960	100/0/0
Madison Local School District	\$ 14,252,855	\$ 14,252,855			\$ 14,252,855	100/0/0
Mason City School District	\$ 696,511	\$ 696,511			\$ 696,511	100/0/0
Middletown School District	\$ 62,511,190	\$ 62,511,190			\$ 62,511,190	100/0/0
Monroe City School District	\$ 15,597,485	\$ 15,597,485			\$ 15,597,485	100/0/0
New Miami School District	\$ 13,824,792	\$ 13,824,792			\$ 13,824,792	100/0/0
Ross Local School District	\$ 16,194,639	\$ 16,194,639			\$ 16,194,639	100/0/0
Talawanda School District	\$ 26,325,847	\$ 26,325,847			\$ 26,325,847	100/0/0
Northwest Local School District	\$ 141,322	\$ 141,322			\$ 141,322	100/0/0
Priebie Shawnee Local School District	\$ 118,093	\$ 118,093			\$ 118,093	100/0/0
Princeton City School District	\$ 2,934,105	\$ 2,934,105			\$ 2,934,105	100/0/0
Southwest School District	\$ 881,712	\$ 881,712			\$ 881,712	100/0/0
Butler County JVS	\$ 18,486,916	\$ 18,486,916			\$ 18,486,916	100/0/0
Great Oaks JVS	\$ 212,015	\$ 212,015			\$ 212,015	100/0/0
Montgomery County JVS	\$ 1,909	\$ 1,909			\$ 1,909	100/0/0
total	\$ 951,802,800	\$ 887,436,427	\$ 53,990,271	\$ 10,376,102	\$ 951,802,800	
		93%	6%	1%		

Expenditures by land use

Overall Findings	
Revenues	\$ 932,086,384
Expenditures	\$ 951,802,800
Excess of Revenues over (under)	\$ (19,714,416)
Expenditures	\$ (96,372,638)
Land Use Ratio, Per Dollar	1.12
	0.49

Butler County General Fund
Fiscal Year 2002

Revenue	Actual	Residential	Comm./Ind.	Farm/Open	Check	Comments
Taxes	\$ 27,220,694	\$ 8,351,309	\$ 16,382,135	\$ 487,250	\$ 27,220,694	31/67/2 - based on interview
Charges for services	\$ 22,234,032	\$ 17,311,417	\$ 4,153,317	\$ 769,298	\$ 22,234,032	78/19/3 - based on interview
Licenses and Permits	\$ 20,665	\$ 20,665	\$ 20,665		\$ 20,665	0/100/0 - based on interview
Fines and Forfeitures	\$ 1,122,528	\$ 903,186	\$ 171,410	\$ 47,932	\$ 1,122,528	81/15/4 - based on interview
Intergovernmental	\$ 8,593,255	\$ 7,120,371	\$ 1,150,637	\$ 322,247	\$ 8,593,255	83/13/4 - based on interview
Interest	\$ 4,725,519	\$ 2,722,371	\$ 1,870,833	\$ 132,315	\$ 4,725,519	58/60/2 - average of revenues
Other	\$ 2,080,485	\$ 1,615,081	\$ 378,440	\$ 86,964	\$ 2,080,485	78/18/4 - based on interview
General Fund Total Revenues	\$ 65,997,178	\$ 38,023,735	\$ 26,127,437	\$ 1,846,006	\$ 65,997,178	
Expenditures						
Fiscal Year 2002						
Expenditure	Actual	Residential	Comm./Ind.	Farm/Open	Check	Comments
General Government- Legislative and Executive						
Commissioners	\$ 1,170,112	\$ 924,037	\$ 192,249	\$ 53,825	\$ 1,170,112	79/16/5 - fallback
Commissioners-Other	\$ 1,575,844	\$ 1,244,444	\$ 258,911	\$ 72,489	\$ 1,575,844	79/16/5 - fallback
Auditor	\$ 1,496,015	\$ 1,181,403	\$ 245,795	\$ 68,817	\$ 1,496,015	79/16/5 - fallback
Treasurer	\$ 1,017,972	\$ 803,892	\$ 167,253	\$ 46,827	\$ 1,017,972	79/16/5 - fallback
Prosecutor	\$ 3,197,315	\$ 3,197,315			\$ 3,197,315	100/0/0 - based on interview
Prosecutor-CSEA	\$ 220,661	\$ 220,661			\$ 220,661	100/0/0 - based on interview
Department of Development	\$ 1,497,351	\$ 742,237	\$ 681,145	\$ 73,969	\$ 1,497,351	50/45/5 - based on interview
Mailroom	\$ 738,529	\$ 583,216	\$ 121,340	\$ 33,972	\$ 738,529	79/16/5 - fallback
Information Services	\$ 1,396,529	\$ 1,102,839	\$ 229,450	\$ 64,240	\$ 1,396,529	79/16/5 - fallback
Prosecutors Child Support Task Force	\$ 44,810	\$ 44,810			\$ 44,810	100/0/0 - based on interview
Prosecutor Gun Control	\$ 29,195	\$ 29,195			\$ 29,195	100/0/0 - based on interview
Board of Elections	\$ 1,460,350	\$ 1,460,350			\$ 1,460,350	100/0/0
Recorder	\$ 753,990	\$ 203,577	\$ 527,793	\$ 22,620	\$ 753,990	27/70/3 - based on interview
Maintenance	\$ 4,029,911	\$ 3,182,421	\$ 662,114	\$ 185,376	\$ 4,029,911	79/16/5 - fallback
Records Center	\$ 323,962	\$ 295,833	\$ 53,227	\$ 14,902	\$ 323,962	79/16/5 - fallback
Bureau of Inspection	\$ 127,195	\$ 100,446	\$ 20,898	\$ 5,851	\$ 127,195	79/16/5 - fallback
Jail Transition Team	\$ 235,338	\$ 223,571	\$ 9,414	\$ 2,353	\$ 235,338	95/4/1 - based on interview
Insurance, Pensions and Taxes	\$ 9,546,305	\$ 7,538,717	\$ 1,568,458	\$ 439,130	\$ 9,546,305	79/16/5 - fallback
Total General Government - Legislative and Executive	\$ 28,861,384	\$ 23,038,965	\$ 4,738,048	\$ 1,084,371	\$ 28,861,384	

Expenditure	Actual	Residential	Comm./Ind.	Farm/Open	Check	Comments
General Government - Judicial						
Court of Appeals	\$ 2,240,892	\$ 1,769,632	\$ 368,179	\$ 103,081	\$ 2,240,892	79/16/5 - fallback
Common Pleas Court	\$ 722,174	\$ 570,301	\$ 118,653	\$ 33,220	\$ 722,174	79/16/5 - fallback
Probate Court	\$ 1,104,872	\$ 872,517	\$ 181,530	\$ 50,824	\$ 1,104,872	79/16/5 - fallback
County Courts	\$ 3,346,809	\$ 3,346,809			\$ 3,346,809	100/0/0
Juvenile Court	\$ 1,742,620	\$ 1,742,620			\$ 1,742,620	100/0/0
Domestic Relations Court	\$ 637,882	\$ 503,735	\$ 104,804	\$ 29,343	\$ 637,882	79/16/5 - fallback
Municipal Court	\$ 538,963	\$ 538,963			\$ 538,963	100/0/0
Drug Court	\$ 1,142,950	\$ 984,537	\$ 123,896	\$ 34,517	\$ 1,142,950	86/11/3 - based on interview
Clerk of Courts	\$ 29,135	\$ 23,008	\$ 4,787	\$ 1,340	\$ 29,135	79/16/5 - fallback
Asbestos Removal	\$ 417,159	\$ 329,430	\$ 68,539	\$ 19,189	\$ 417,159	79/16/5 - fallback
Court of Appeals	\$ 11,923,456	\$ 10,681,554	\$ 970,388	\$ 271,514	\$ 11,923,456	
Total General Government - Judicial						
Public Safety						
Coroner	\$ 686,118	\$ 686,118			\$ 686,118	100/0/0
Sheriff	\$ 14,756,712	\$ 11,510,235	\$ 1,481,574	\$ 1,764,903	\$ 14,756,712	78/10/12 - based on interview
Juvenile Detention Center	\$ 1,927,409	\$ 1,927,409			\$ 1,927,409	100/0/0
Adult Probation	\$ 1,602,373	\$ 1,522,254	\$ 64,095	\$ 16,024	\$ 1,602,373	95/4/1 - prison breakdown
Paramedics	\$ 1,187,130	\$ 1,127,774	\$ 47,485	\$ 11,871	\$ 1,187,130	95/4/1 - prison breakdown
Criminal Justice Board	\$ 42,550	\$ 40,423	\$ 1,702	\$ 426	\$ 42,550	95/4/1 - prison breakdown
Butler Clermont Warren Corrections	\$ 27,992	\$ 26,592	\$ 1,120	\$ 280	\$ 27,992	95/4/1 - prison breakdown
Sheriffs Academy	\$ 27,957	\$ 21,806	\$ 2,807	\$ 3,344	\$ 27,957	78/10/12 - based on interview
Sheriffs Resolutions	\$ 4,116,405	\$ 3,910,585	\$ 164,656	\$ 41,164	\$ 4,116,405	95/4/1 - based on interview
Total Public Safety	\$ 24,374,646	\$ 20,773,196	\$ 1,763,439	\$ 1,838,011	\$ 24,374,646	
Public Works						
Engineers-Plat Room	\$ 151,084	\$ 135,220	\$ 604	\$ 15,259	\$ 151,084	90/1/10 - based on interview
Community Grants	\$ 571,028	\$ 428,271	\$ 142,757		\$ 571,028	75/25/0 - based on interview
Solid Waste Landfill	\$ 46,117	\$ 36,419	\$ 7,577	\$ 2,121	\$ 46,117	79/16/5 - fallback
Total Department of Public Works	\$ 768,229	\$ 599,910	\$ 150,938	\$ 17,381	\$ 768,229	
Health						
Registration Vital Statistics	\$ 6,864	\$ 5,421	\$ 1,128	\$ 316	\$ 6,864	79/16/5 - fallback
Other Health	\$ 425,262	\$ 425,262			\$ 425,262	100/0/0 - based on interview
Total Health	\$ 432,126	\$ 430,683	\$ 1,128	\$ 316	\$ 432,126	
Human Services						
Human Services	\$ 726,058	\$ 726,058			\$ 726,058	100/0/0 - based on interview
Soldiers Relief	\$ 18,189	\$ 18,189			\$ 18,189	100/0/0 - based on interview
Veterans Services	\$ 744,247	\$ 744,247			\$ 744,247	
Total Human Services	\$ 1,498,494	\$ 1,498,494			\$ 1,498,494	
Conservation and Recreation						
Agricultural	\$ 462,722	\$ 275,500	\$ 38,180	\$ 149,042	\$ 462,722	60/8/32 - based on interviews
Emergency Management	\$ 28,000	\$ 22,112	\$ 4,600	\$ 1,288	\$ 28,000	79/16/5 - fallback
Historical Society	\$ 30,000	\$ 23,691	\$ 4,929	\$ 1,380	\$ 30,000	79/16/5 - fallback
Total Conservation and Recreation	\$ 520,722	\$ 321,303	\$ 47,709	\$ 151,710	\$ 520,722	
General Fund Total Expenditures	\$ 67,624,810	\$ 56,589,657	\$ 7,671,650	\$ 3,363,303	\$ 67,624,810	

Special Revenue Funds
Fiscal Year 2002

Fund	Actual	Residential	Comm./Ind.	Farm/Open	Check	Comments
<u>Mental Retardation Special Revenue Fund</u>						
Revenues:						
Taxes	\$ 13,954,379	\$ 11,019,773	\$ 2,292,704	\$ 641,901	\$ 13,954,379	79/16/5 - fallback
Charges for Services	\$ 464,951	\$ 464,951			\$ 464,951	100/0/0
Intergovernmental	\$ 10,334,812	\$ 10,334,812			\$ 10,334,812	100/0/0
Other	\$ 338,099	\$ 338,099			\$ 338,099	100/0/0
Total Revenues	\$ 25,092,241	\$ 22,157,635	\$ 2,292,704	\$ 641,901	\$ 25,092,241	
Expenditures:						
Total Expenditures	\$ 26,979,003	\$ 26,979,003			\$ 26,979,003	100/0/0 - based on interview
<u>Job & Family Services Special Revenue Fund</u>						
Revenues:						
Intergovernmental	\$ 27,762,673					
Other	\$ 1,257,868					
Total Revenues	\$ 29,020,541	\$ 26,118,487	\$ 2,902,054		\$ 29,020,541	90/10/0 - based on interview
Expenditures:						
Total Expenditures	\$ 34,522,483	\$ 31,070,235	\$ 3,452,248		\$ 34,522,483	90/10/0 - based on interview
<u>Children Services Special Revenue Fund</u>						
Revenues:						
Taxes	\$ 7,678,294	\$ 6,063,549	\$ 1,261,544	\$ 353,202	\$ 7,678,294	79/16/5 - fallback
Intergovernmental	\$ 9,848,417	\$ 9,848,417			\$ 9,848,417	100/0/0
Other	\$ 161,389	\$ 161,389			\$ 161,389	100/0/0
Total Revenues	\$ 17,688,100	\$ 16,073,355	\$ 1,261,544	\$ 353,202	\$ 17,688,100	
Expenditures:						
Total Expenditures	\$ 24,541,934	\$ 24,541,934	\$ -	\$ -	\$ 24,541,934	100/0/0 - based on interview
<u>Bond Retirement-Debt Services Fund</u>						
Revenues:						
Special Assessments	\$ 1,604,625		\$ 1,604,625		\$ 1,604,625	0/100/0 - based on interview
Interest	\$ 11,842		\$ 11,842		\$ 11,842	0/100/0 - based on interview
Total Revenues	\$ 1,616,467	\$ -	\$ 1,616,467	\$ -	\$ 1,616,467	
Expenditures:						
Total Expenditures	\$ 113,042,942	\$ 89,270,011	\$ 18,572,955	\$ 5,199,975	\$ 113,042,942	79/16/5 - fallback
Other Financing Sources (Uses):						
Other Financing Sources	\$ 10,998					
Proceeds of Bonds	\$ 416,324					
Proceeds of Notes	\$ 62,960,000					
Operating Transfers - In	\$ 48,226,186					
Operating Transfers - Out	\$ -					
Total Other Financing Sources (Uses)	\$ 111,613,508	\$ 88,141,187	\$ 18,338,099	\$ 5,134,221	\$ 111,613,508	79/16/5 - fallback

Fund	Actual	Residential	Comm./Ind.	Farm/Open	Check	Comments
Buildings Construction and Renovations--						
Capital Projects Fund						
Revenues:						
Intergovernmental	\$ 5,897,370	\$ 5,473,349	\$ 336,150	\$ 87,871	\$ 5,897,370	93/6/1 - based on interview
Interest	\$ 235,155	\$ 218,247	\$ 13,404	\$ 3,504	\$ 235,155	93/6/1 - based on interview
Total Revenues	\$ 6,132,525	\$ 5,691,596	\$ 349,554	\$ 91,375	\$ 6,132,525	
Expenditures:						
Total Expenditures	\$ 13,727,788	\$ 12,740,760	\$ 782,484	\$ 204,544	\$ 13,727,788	93/6/1 - based on interview
Other Financing Sources (Uses):						
Proceeds of Bonds	\$ 31,200,000					
Proceeds of Notes	\$ 4,520,000					
Operating Transfers - In	\$ 329,000					
Operating Transfers - Out	\$ (31,375,169)					
Total Other Financing Sources (Uses)	\$ 4,673,831	\$ 4,337,783	\$ 266,408	\$ 69,640	\$ 4,673,831	93/6/1 - based on interview
Sewer Enterprise Fund						
Revenues:						
Charges for Services	\$ 16,193,472					
Special Assessments	\$ 232,569					
Other Non-Operating Revenues	\$ 6,938,936					
Other Operating Revenues	\$ 326,325					
Total Revenues	\$ 23,691,322	\$ 17,057,752	\$ 6,633,570	\$ -	\$ 23,691,322	72/28/0 - based on interview
Expenditures:						
Total Expenditures	\$ 16,760,832	\$ 11,988,805	\$ 4,662,313	\$ 109,714	\$ 16,760,832	71/28/1 - based on interview
Operating Transfers - In	\$ -					
Operating Transfers - Out	\$ (6,649,315)	\$ (4,787,507)	\$ (1,861,808)		\$ (6,649,315)	72/28/0 - based on interview
Water Enterprise Fund						
Revenues:						
Charges for Services	\$ 20,483,558					
Interest Income	\$ 115,023					
Other Non-Operating Revenues	\$ 4,086,440					
Other Operating Revenues	\$ 174,816					
Premium on Bonds Issued	\$ 522,419					
Proceeds of Bonds	\$ 35,030,000					
Total Revenues	\$ 60,412,256	\$ 47,423,621	\$ 12,988,635	\$ -	\$ 60,412,256	78.5/21.5/0 - based on interview
Expenditures:						
Total Expenditures	\$ 59,516,326	\$ 46,720,316	\$ 12,796,010	\$ -	\$ 59,516,326	78.5/21.5/0 - based on interview
Operating Transfers - In	\$ -					
Operating Transfers - Out	\$ (2,499,306)	\$ (1,961,955)	\$ (537,351)	\$ -	\$ (2,499,306)	78.5/21.5/0 - based on interview
GSC Parking Facility--Enterprise Fund						
Revenues:						
Charges for Services	\$ 131,423	\$ 103,785	\$ 21,593	\$ 6,045	\$ 131,423	79/16/5 - fallback
Other Non-Operating Revenues	\$ 697	\$ 550	\$ 115	\$ 32	\$ 697	79/16/5 - fallback
Total Revenues	\$ 132,120	\$ 104,335	\$ 21,707	\$ 6,078	\$ 132,120	
Expenditures:						
Total Expenditures	\$ 81,045	\$ 64,001	\$ 13,316	\$ 3,728	\$ 81,045	79/16/5 - fallback
Operating Transfers - Out	\$ (45,000)	\$ (35,537)	\$ (7,394)	\$ (2,079)	\$ (45,000)	79/16/5 - fallback

Fund	Actual	Residential	Comm./Ind.	Farm/Open	Check	Comments
Real Estate Assessment--Special Revenue Fund						
Revenues:						
Charges for Services	\$ 2,610,477	\$ 2,061,494	\$ 428,901	\$ 120,082	\$ 2,610,477	79/16/5 - fallback
Other	\$ 157,910	\$ 124,702	\$ 25,945	\$ 7,264	\$ 157,910	79/16/5 - fallback
Total Revenues	\$ 2,768,387	\$ 2,186,195	\$ 454,846	\$ 127,346	\$ 2,768,387	
Expenditures:						
Total Expenditures	\$ 3,052,916	\$ 2,410,888	\$ 501,594	\$ 140,434	\$ 3,052,916	79/16/5 - fallback
Other Financing Sources	\$ 61,217	\$ 48,343	\$ 10,058	\$ 2,816	\$ 61,217	79/16/5 - fallback
All Other Legislative and Executive--Special Revenue Fund						
Revenues:						
Taxes	\$ 161,898	\$ 127,851	\$ 26,600	\$ 7,447	\$ 161,898	79/16/5 - fallback
Charges for Services	\$ 2,762,920	\$ 1,711,076	\$ 997,967	\$ 53,877	\$ 2,762,920	62/36/2 - based on interview
Intergovernmental	\$ 18,239	\$ 18,239	\$	\$	\$ 18,239	100/0/0 - Homestead & Rollback
Special Assessments	\$ 166,450	\$ 131,446	\$ 27,348	\$ 7,657	\$ 166,450	79/16/5 - fallback
Interest	\$ 19,948	\$ 12,771	\$ 6,736	\$ 441	\$ 19,948	64/34/2 - average of revenues
Other	\$ 34,995	\$ 24,612	\$ 9,907	\$ 476	\$ 34,995	70/28/2 - based on interview
Total Revenues	\$ 3,164,450	\$ 2,025,994	\$ 1,068,558	\$ 69,898	\$ 3,164,450	
Expenditures:						
Total Expenditures	\$ 2,846,401	\$ 2,016,390	\$ 769,667	\$ 60,344	\$ 2,846,401	71/27/2 - based on interview
Other Financing (Uses):						
Advances - Out	\$ (42,000)					
Operating Transfers - Out	\$ (80,000)					
Total Other Financing Sources (Uses)	\$ (122,000)	\$ (78,104)	\$ (41,199)	\$ (2,696)	\$ (122,000)	64/34/2 - based on interview
All Other Judicial--Special Revenue Fund						
Revenues:						
Charges for Services	\$ 1,184,587	\$ 948,380	\$ 184,559	\$ 51,648	\$ 1,184,587	80/16/4 - based on interview
Fines and Forfeitures	\$ 31,439	\$ 30,886	\$ 431	\$ 123	\$ 31,439	98/1/1 - based on interview
Other	\$ 5,549	\$ 4,382	\$ 912	\$ 255	\$ 5,549	79/16/5 - fallback
Total Revenues	\$ 1,221,575	\$ 983,648	\$ 185,901	\$ 52,026	\$ 1,221,575	
Expenditures:						
Total Expenditures	\$ 918,911	\$ 739,448	\$ 140,226	\$ 39,237	\$ 918,911	81/15/4 - based on interview
Other Financing Sources (Uses):						
Operating Transfers - In	\$ 50,000					
Operating Transfers - Out	\$ (27,775)					
Total Other Financing Sources (Uses)	\$ 22,225	\$ 17,884	\$ 3,392	\$ 949	\$ 22,225	81/15/4 - based on interview
All Other Public Safety--Special Revenue Fund						
Revenues:						
Charges for Services	\$ 278,980	\$ 265,031	\$ 11,159	\$ 2,790	\$ 278,980	95/4/1 - prison breakdown
Fines and Forfeitures	\$ 3,491	\$ 2,757	\$ 574	\$ 161	\$ 3,491	79/16/5 - fallback
Intergovernmental	\$ 6,737,774	\$ 6,532,485	\$ 148,905	\$ 36,384	\$ 6,737,774	97/2/1 - based on interview
Other	\$ 68,588	\$ 66,770	\$ 1,447	\$ 370	\$ 68,588	97/2/1 - based on interview
Total Revenues	\$ 7,088,833	\$ 6,887,043	\$ 162,085	\$ 39,705	\$ 7,088,833	
Expenditures:						
Total Expenditures	\$ 7,261,700	\$ 7,049,658	\$ 163,388	\$ 48,653	\$ 7,261,700	97/2/1 - based on interview

Fund	Actual	Residential	Comm./Ind.	Farm/Open	Check	Comments
Child Support Enforcement Special Revenue Fund						
Revenues:						
Charges for Services	\$ 795,024					
Intergovernmental	\$ 5,044,996					
Other	\$ 221,998					
Total Revenues	\$ 6,062,018	\$ 6,062,018	\$ -	\$ -	\$ 6,062,018	100/0/0 - based on interview
Expenditures:						
Total Expenditures	\$ 6,063,377	\$ 6,063,377	\$ -	\$ -	\$ 6,063,377	100/0/0 - based on interview
Motor Vehicle-Special Revenue Fund						
Revenues:						
Taxes	\$ 2,264,700	\$ 1,788,434	\$ 372,090	\$ 104,176	\$ 2,264,700	79/16/5 - fallback
Charges for Services	\$ 494,686	\$ 368,838	\$ 122,880	\$ 2,968	\$ 494,686	78/22/1 - based on interviews
Fines and Forfeitures	\$ 305,882	\$ 160,802	\$ 143,489	\$ 1,591	\$ 305,882	52/47/1 - based on interview
Intergovernmental	\$ 11,991,922	\$ 9,298,536	\$ 2,629,828	\$ 63,557	\$ 11,991,922	78/22/1 - based on interviews
Other	\$ 436,883	\$ 389,180	\$ 36,786	\$ 917	\$ 436,883	91/8/1 - Road Usage Data
Total Revenues	\$ 15,494,073	\$ 12,015,790	\$ 3,305,074	\$ 173,210	\$ 15,494,073	
Expenditures:						
Total Expenditures	\$ 14,406,722	\$ 13,163,422	\$ 1,213,046	\$ 30,254	\$ 14,406,722	91/8/1 - Road Usage Data
All Other Public Works--Special Revenue Fund						
Revenues:						
Charges for Services	\$ 176,068	\$ 1,056	\$ 174,483	\$ 528	\$ 176,068	1/99/1 - based on interview
Intergovernmental	\$ 2,545,250	\$ 1,560,747	\$ 265,979	\$ 718,524	\$ 2,545,250	61/11/28 - based on interviews
Special Assessments	\$ 164,692	\$ 164,692			\$ 164,692	100/0/0 - based on interview
Interest	\$ 47,842	\$ 27,595	\$ 8,769	\$ 11,477	\$ 47,842	58/18/24 - average of other revenues
Other	\$ 114,937	\$ 4,448	\$ 109,650	\$ 839	\$ 114,937	4/95/1 - based on interviews
Total Revenues	\$ 3,048,789	\$ 1,758,539	\$ 556,881	\$ 731,369	\$ 3,048,789	
Expenditures:						
Total Expenditures	\$ 4,748,439	\$ 3,258,379	\$ 780,643	\$ 709,417	\$ 4,748,439	67/16/15 - based on interview
Alcohol and Drug Addiction Service--Special Revenue Fund						
Revenues:						
Charges for Services	\$ 56,025					
Intergovernmental	\$ 4,969,158					
Other	\$ 123,825					
Total Revenues	\$ 4,969,158	\$ 4,969,158			\$ 4,969,158	100/0/0
Expenditures:						
Total Expenditures	\$ 4,893,247	\$ 4,893,247			\$ 4,893,247	100/0/0 - based on interview
Other Financing Sources:	\$ 423					
Operating Transfers - In	\$ 423				\$ 423	100/0/0

Fund	Actual	Residential	Comm./Ind.	Farm/Open	Check	Comments
<u>Mental Health - Special Revenue Fund</u>						
Revenues:						
Taxes	\$ 1,838,763	\$ 1,452,071	\$ 302,109	\$ 84,583	\$ 1,838,763	79/16/5 - fallback
Intergovernmental	\$ 13,511,966	\$ 13,511,966			\$ 13,511,966	100/0/0
Other	\$ 965,097	\$ 965,097			\$ 965,097	100/0/0
Total Revenues	\$ 16,315,826	\$ 15,929,134	\$ 302,109	\$ 84,583	\$ 16,315,826	
Expenditures:						
Total Expenditures	\$ 17,606,225	\$ 17,606,225			\$ 17,606,225	100/0/0 - based on interview
<u>Other Financing Sources:</u>						
Total Other Financing Sources	\$ 142	\$ 142			\$ 142	100/0/0
<u>All Other Health - Special Revenue Fund</u>						
Revenues:						
Licenses and Permits -	\$ 338,833					
Fines and Forfeitures	\$ 18,986					
Other	\$ 5,767					
Total Revenues	\$ 363,586	\$ 363,586	\$ -	\$ -	\$ 363,586	100/0/0 - based on interview
Expenditures:						
Total Expenditures	\$ 454,353	\$ 408,918	\$ 40,892	\$ 4,544	\$ 454,353	90/9/1 - based on interview
<u>Other Financing Sources:</u>						
Advances - In	\$ 75,000					
Total Other Financing Sources	\$ 75,000	\$ 67,500	\$ 6,750	\$ 750	\$ 75,000	90/9/1 - based on interview
<u>County Care Facility - Special Revenue Fund</u>						
Revenues:						
Charges for Services	\$ 1,281,506					
Intergovernmental	\$ 6,047,257					
Other	\$ 131,272					
Total Revenues	\$ 7,460,035	\$ 7,460,035	\$ -	\$ -	\$ 7,460,035	100/0/0 - based on interview
Expenditures:						
Total Expenditures	\$ 7,335,947	\$ 7,335,947	\$ -	\$ -	\$ 7,335,947	100/0/0 - based on interview
<u>Elderly Services Levy - Special Revenue Fund</u>						
Revenues:						
Taxes	\$ 7,104,791	\$ 5,610,653	\$ 1,167,317	\$ 326,820	\$ 7,104,791	79/16/5 - fallback
Intergovernmental	\$ 785,570	\$ 785,570			\$ 785,570	100/0/0 - based on interview
Other	\$ 30	\$ 30			\$ 30	100/0/0 - based on interview
Total Revenues	\$ 7,890,391	\$ 6,396,253	\$ 1,167,317	\$ 326,820	\$ 7,890,391	
Expenditures:						
Total Expenditures	\$ 7,408,213	\$ 7,408,213	\$ -	\$ -	\$ 7,408,213	100/0/0 - based on interview

Fund	Actual	Residential	Comm./Ind.	Farm/Open	Check	Comments
All Other Human Services--Special						
Revenue Fund						
Revenues:						
Intergovernmental	\$ 155,773					
Other	\$ 2,474					
Total Revenues	\$ 158,247	\$ 158,247	\$ -	\$ -	\$ 158,247	100/0/0 - based on interview
Expenditures:						
Total Expenditures	\$ 220,540	\$ 220,540	\$ -	\$ -	\$ 220,540	100/0/0 - based on interview
Other Financing Sources:						
Advances - In	\$ 16,000					
Operating Transfers - In	\$ 54,395					
Total Other Financing Sources	\$ 70,395	\$ 70,395	\$ -	\$ -	\$ 70,395	100/0/0 - based on interview
Capital Improvement--Capital Projects						
Fund						
Revenues:						
Intergovernmental	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Revenues	\$ -	\$ -	\$ -	\$ -	\$ -	
Expenditures:						
Total Expenditures	\$ 223,753	\$ 176,698	\$ 36,763	\$ 10,293	\$ 223,753	79/16/5 - fallback
Other Financing Sources:						
Operating Transfers - In	\$ 112,000					
Total Other Financing Sources	\$ 112,000	\$ 88,446	\$ 18,402	\$ 5,152	\$ 112,000	79/16/5 - fallback
Stormwater Management Study--Capital						
Projects Fund						
Revenues:						
Interest	\$ 2,389					
Total Revenues	\$ 2,389	\$ 2,106	\$ 283	\$ -	\$ 2,389	88/12/0 - based on interview
Expenditures:						
Total Expenditures	\$ 136,665	\$ 120,470	\$ 16,195	\$ -	\$ 136,665	88/12/0 - based on interview
Other Financing Sources:						
Proceeds of Notes	\$ 505,000					
Operating Transfers - Out	\$ (3,565)					
Total Other Financing Sources	\$ 501,435	\$ 442,015	\$ 59,420	\$ -	\$ 501,435	88/12/0 - based on interview
Road Improvement--Capital Projects Fund						
Revenues:						
Intergovernmental	\$ 1,132,184	\$ 1,034,477	\$ 95,330	\$ 2,378	\$ 1,132,184	91/8/1 - Road Usage Data
Special Assessments	\$ 19,111	\$ 19,111	\$ 19,111	\$ -	\$ 19,111	07/00/0 - based on interview
Interest	\$ 121,949	\$ 109,571	\$ 12,122	\$ 256	\$ 121,949	90/10/1 - average of revenues
Total Revenues	\$ 1,273,244	\$ 1,144,048	\$ 126,563	\$ 2,634	\$ 1,273,244	
Expenditures:						
Total Expenditures	\$ 9,956,610	\$ 9,097,355	\$ 838,347	\$ 20,909	\$ 9,956,610	91/8/1 - Road Usage Data
Other Financing Sources (Uses):						
Proceeds of Notes	\$ 7,180,000					
Advances - In	\$ 60,615					
Operating Transfers - Out	\$ (260,661)					
Total Other Financing Sources (Uses)	\$ 6,979,954	\$ 6,377,584	\$ 587,712	\$ 14,658	\$ 6,979,954	91/8/1 - Road Usage Data

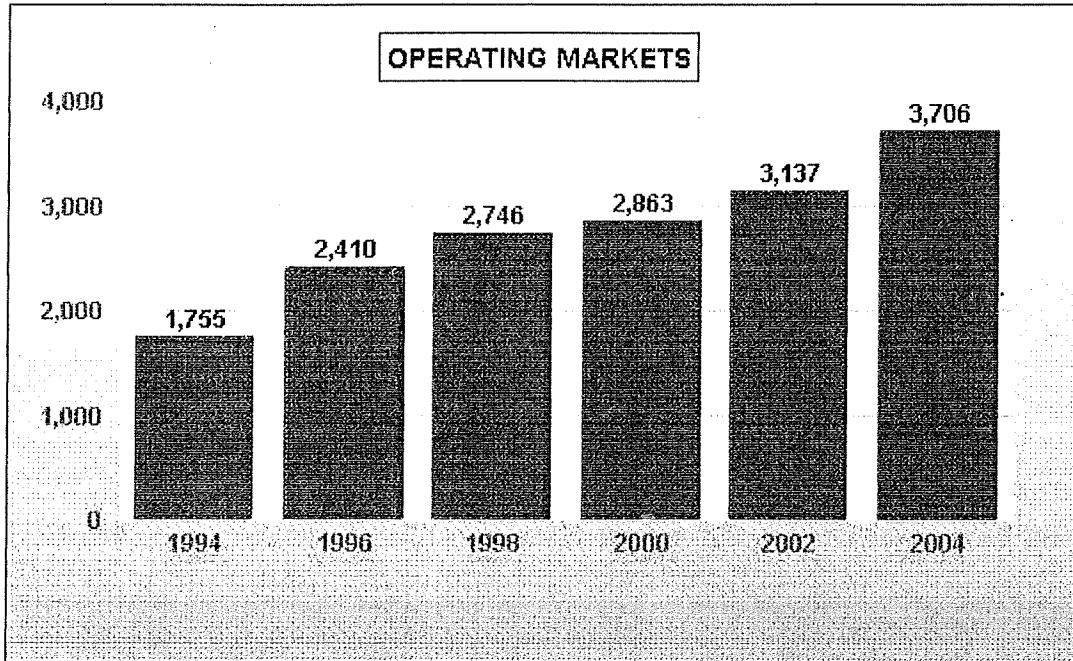
Fund	Actual	Residential	Comm./Ind.	Farm/Open	Check	Comments
Technology—Capital Projects Fund						
Revenues:						
Interest	\$ 44,773					
Other	\$ 220,592					
Total Revenues	\$ 265,365	\$ 209,559	\$ 43,599	\$ 12,207	\$ 265,365	79/16/5 - fallback
Expenditures:						
Total Expenditures	\$ 5,971,427	\$ 4,715,636	\$ 981,105	\$ 274,686	\$ 5,971,427	79/16/5 - fallback
Other Financing Sources (Uses):						
Proceeds of Bonds	\$ 2,865,000					
Proceeds of Notes	\$ 4,770,000					
Advances - In	\$ 50,000					
Operating Transfers - In	\$ 250,000					
Operating Transfers - Out	\$ (2,955,543)					
Total Other Financing Sources (Uses)	\$ 4,979,457	\$ 3,932,277	\$ 818,125	\$ 229,055	\$ 4,979,457	79/16/5 - fallback
Workers Compensation Benefit—Internal Service Fund						
Revenues:						
Charges for Services	\$ 804,967					
Other Non-Operating Revenues						
Other Operating Revenues	\$ 240,616					
Total Revenues	\$ 1,045,583	\$ 825,697	\$ 171,789	\$ 48,097	\$ 1,045,583	79/16/5 - fallback
Expenditures:						
Total Expenditures	\$ 2,947,187	\$ 2,327,394	\$ 484,223	\$ 135,571	\$ 2,947,187	79/16/5 - fallback
Health Insurance—Internal Service Fund						
Revenues:						
Charges for Services	\$ 928,945	\$ 733,588	\$ 152,626	\$ 42,731	\$ 928,945	79/16/5 - fallback
Total Revenues	\$ 928,945	\$ 733,588	\$ 152,626	\$ 42,731	\$ 928,945	
Expenditures:						
Total Expenditures	\$ 445,567	\$ 351,864	\$ 73,207	\$ 20,496	\$ 445,567	79/16/5 - fallback
Total Revenue, Special Revenue Funds	\$ 363,080,432	\$ 301,398,297	\$ 53,426,480	\$ 8,255,655	\$ 363,080,432	
Total Expenditure, Special Revenue Funds	\$ 386,070,553	\$ 332,739,133	\$ 46,318,621	\$ 7,012,798	\$ 386,070,553	



AMS Farmers Markets

Farmers Market Growth

In 1994, the U.S. Department of Agriculture (USDA) began publishing the National Directory of Farmers Markets which lists all farmers markets operating in the U.S. Since that time, USDA has updated the Directory every 2 years. The following graph shows the number of markets at each update.



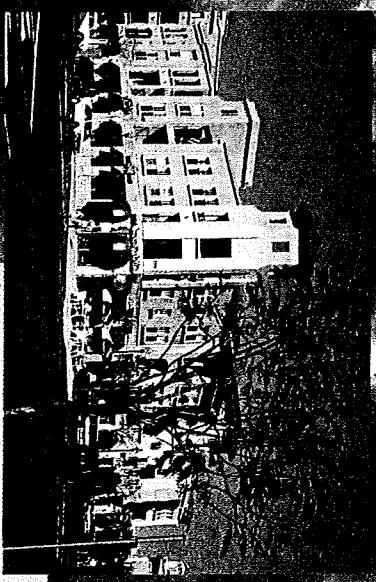
[Follow this link for a text description of chart titled "Farmers Market Growth, 1994-2004."](#)

[Find a Farmers Market in Your State](#)

[Return to Marketing Services Branch](#)

WHY SMART GROWTH: A PRIMER

International City/County Managers Association
with Geoff Anderson



WHY SMART GROWTH: A PRIMER

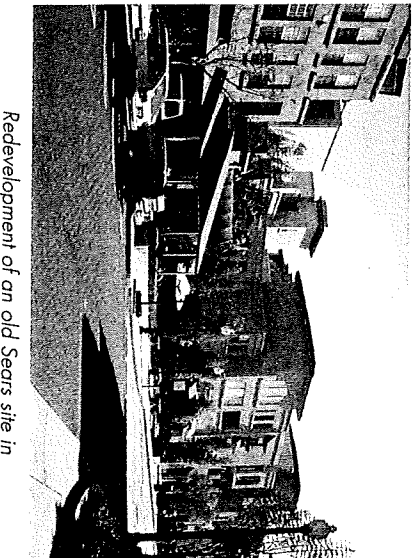
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EXECUTIVE SUMMARY



Redevelopment of an old Sears site in San Diego, California.

In communities across the nation, there is a growing concern that current development patterns—dominated by what some call “sprawl”—are no longer in the long-term interest of our cities, existing suburbs, small towns, rural communities, or wilderness areas. Though supportive of growth, communities are questioning the economic costs of abandoning infrastructure in the city, only to rebuild it further out. They are questioning the social costs of the mismatch between new employment locations in the suburbs and the available workforce in the city. They are questioning the wisdom of abandoning “brownfields” in older communities, eating up the open space and prime agricultural lands at the suburban fringe, and polluting the air of an entire region by driving farther to get places. Spurring the smart growth movement are demographic shifts, a strong environmental ethic, increased fiscal concerns, and more nuanced views of growth. The result is both a new demand and a new opportunity for smart growth.

This opportunity should not be confused with “no growth,” or even “slow growth.” People want the jobs, tax revenues, and amenities that come with development. But they want these benefits without degrading the environment, raising local taxes, increasing traffic congestion, or busting budgets. More and more local governments are finding that current development patterns frequently fail to provide this balance.

Kansas City, Missouri, and Lancaster County, Pennsylvania, are two communities searching for this balance. Kansas City has struggled with the classic pattern of disinvestment in urban/suburban areas while investment in as-yet-unbuilt communities on the fringe continues. In the last two decades, flight from the core to the suburbs created a “golden ring” of the priciest homes encircling the city; this ring has moved ever further outward over time. In Lancaster County, the rural character is undermined by its own popularity. Traffic congestion, higher taxes, decline in public services, loss of farmland, and breakup of the area’s diverse culture threatened the county’s quality of life and future. On the other hand, Portland, Oregon, with its long-standing urban growth boundary, downtown building boom, and well-developed transit system is one of the best known and frequently cited examples of smart growth.

Smart growth recognizes connections between development and quality of life. It leverages new growth to improve the community. The features that distinguish smart growth in a community vary from place to place. In general, smart growth invests time, attention, and resources in restoring community and vitality to center cities and older suburbs. New smart growth is more town-centered, is transit and pedestrian oriented, and has a greater mix of housing, commercial and retail uses. It also preserves open space and many other environmental amenities. But there is no “one-size-fits-all” solution. Successful communities do tend to have one thing

Local economic development strategy also affects growth patterns. Many have come to equate attracting new business with improving the community's economy. Sometimes development represents a net increase in economic activity, but it may also simply shift economic activity from one area to another. The new shopping mall on the edge of town may result in the closure of shops downtown. Many smaller stores rely upon the foot traffic created by a successful group of stores. If a few close, the entire area may fail.

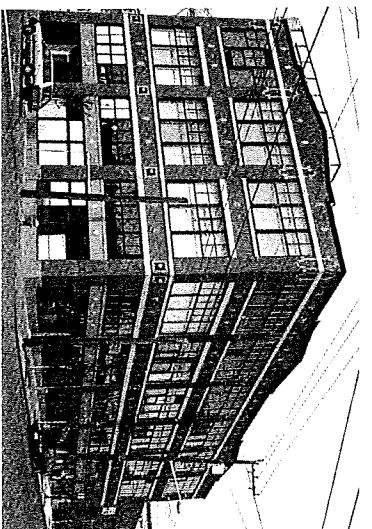
Many communities have refused an "either/or" attitude toward this problem. Instead they are providing incentives for locating "big-box" stores and other major retail chains downtown, increasing competition and downtown pedestrian traffic. For an economy to truly develop, local governments must also be cognizant of the nonmarket costs associated with different development patterns. For instance, will a mall on the fringe cause greater congestion and air pollution or reduce them? Will it add to or detract from the community's social fabric? Is the downtown a focal point for the community? Does it define the community in any way? These "livability" factors are increasingly important in attracting mobile, high-tech businesses.

To further investment in existing communities and create and preserve social capital at the same time, some states have turned to direct incentives for historic preservation. Others have focused more on business retention and expansion than on finding new tenants.

However, more common for neighboring jurisdictions is to compete for new business and tax base. While communities compete to further their own gains, they may be more dependent on the region than they want to admit. Ultimately, competition between jurisdictions can be a losing proposition all the way around. *Emerging Trends in Real Estate*, an industry report, agrees. The report cites one expert who says: "There's nothing worse than having neighboring suburban municipalities competing with one another for resources and tax base....The schools go downhill, middle-class neighborhoods become lower-class. It can be over quickly." The net result? Those who can afford to move farther out, fueling the trend.

Changing development patterns have environmental implications. Farmland and open space are consumed by increasingly distant and dispersed development. Air quality is worsened as people are forced to make longer trips and become more auto-dependent. More land area covered by roads and rooftops translates into more polluted runoff in local streams and lakes. And because few incentives exist for moving development back into existing communities, abandoned downtown sites remain derelict, degrading the quality of life for area residents. Some communities are countering these trends by encouraging brownfield redevelopment and more compact, mixed use, pedestrian and transit-oriented new communities.

As local public participation shows, development, and in many cases lack of development, greatly impact a community's quality of



Historic preservation contributes housing to central cities.

life. Urban cores such as downtown Columbus, Ohio, live with the consequences of disinvestment, population decline, and concentration of poverty. Until recently, this decline was seen as an urban problem. However, now many suburbs find Columbus' story is their story too. No longer an urban problem, this pattern of decline is recognized by many as the outcome of a tilted playing field—one that favors investment in as-yet-unbuilt communities while discouraging investment in existing ones. The social consequences for communities can be severe.

But even where suburbs are currently economically healthy, some residents believe that their community fabric is weak. A recent article in *American Enterprise*, "Are Today's Suburbs Really Family-Friendly?" argues that typical suburban development is "desirable for families not so much for what it is as for what it isn't: it is not dangerous, not dirty.... It offers more physical security than cities and greater economic security than the average small

PROLOGUE

Growth and development are controversial almost everywhere. Public debates are often pitched in extreme terms of property rights versus the public good, social engineering versus the free market, and unfettered growth versus no growth. Both sides in the debate formulate their positions from truths about growth. Growth can fuel economic expansion, revitalize commercial districts, and increase the tax base. But it can also cause traffic congestion, drain local resources, and destroy local cultural and ecological features.

A community's growth strategy can greatly influence the outcome of growth. Ultimately, these results affect the health and welfare not only of the individual community, but also of entire regions and, indirectly, the entire nation. This primer uses research, economic analyses, and actual community experience to illustrate a new concept known as "smart growth." Smart growth adds value to existing communities while engaging all stakeholders and rewarding developers with profitable products.

INTRODUCTION

Smart growth shifts the terms of debate away from the pro- and anti-growth context of the past. Coalitions of developers, environmentalists, citizens, and government officials are banding together to address the new fundamental question, which is not whether to grow but how. Successful communities have a vision of where they want to go and of what things they value in their neighborhoods and downtowns. Their plans for development reflect these values and answer questions facing communities nationwide. How can a community capture the benefits of growth without overcrowding its schools? How can a community maintain its small-town charm and character while accommodating new residents and prospering economically? How can a community, city, or suburb benefit from growth but not suffer the post-growth disinvestment that so often follows?

Across the country in large metropolitan areas and rural towns alike, growth and development are receiving increased attention. Growth patterns are linked to a community's success in providing quality schools, relieving traffic congestion and air pollution, controlling taxes, and providing economic opportunity. Major regional newspapers in Kansas City, Missouri, and Charlotte, North Carolina, reported on this connection, examining "sprawl" in terms of loss of farmland and fiscal stability, as well as of disinvestment in older cities and suburbs. Rural areas are responding to the growth they see heading

their way. In rapidly growing communities from Virginia to Idaho, small towns hold local forums on growth. Anticipating rapid development, they seek to preserve their way of life.

Of course, growth has another face. It is praised for successfully leveraging existing

BUILDING BOOM REVITALIZES CALIFORNIA CITY

In 1989, the San Francisco Chronicle ranked the city of Suisun as the worst place to live in the Bay Area. In response, the city took on a massive building effort in its own downtown, renovating some buildings, demolishing others, and clearing the waterfront for better commercial and citizen access. Today, commercial activities have returned to the downtown and the waterfront draws boaters and festival crowds.

—USA Today¹

investment, revitalizing downtowns in Cleveland and Baltimore, and fueling economic expansion in already thriving neighborhoods in Portland, Oregon. It is responsible for the revitalization of Suisun City in California. Innovative developers are using new suburban growth to increase the sense of community and add amenities to bedroom communities. In discrete increments, such as renovation of houses and redevelopment of abandoned sites, growth keeps communities healthy and livable.

Despite successes associated with growth, communities increasingly have an ingrained, BANANA (build absolutely nothing anywhere near anything) reaction. In many such cases, the community has failed to recognize qualitative differences among growth patterns. Rather than blindly resisting growth, communities can find strength in directing growth to meet their objectives, such as affordable housing, economic development, and better transportation alternatives. The key is to ask how to use growth rather than how to stop it.

Current development patterns are all too familiar. Post-World War II growth has been characterized by disinvestment in older communities and the flight of much of the middle class to newer, diffuse, single-use developments. Cities such as Chicago and Philadelphia have grown by more than 30 percent in land but by less than 5 percent in population between 1970 and 1990.² In the 1940s and 1950s, it was commonly assumed that such growth automatically meant investment, jobs, new housing, and an improved tax base. These

investment value longer. These places will be attractive sites for new investment and growth, which will improve their ability to compete in the world economy. Some places have already taken steps in this direction. Others are only beginning to see the possibilities.

The remainder of this primer explores both positive and negative aspects of growth and suggests how communities can achieve smart growth. Part I uses three case studies to illustrate why it is important to ask questions about proposed growth. Part II reviews a range of results from growth, looking separately at government, economic, environmental, and community effects. The appendices describe a number of tools and assessments that you can use to begin creating smart growth.

PART I

ASKING THE RIGHT QUESTIONS

Successful growth starts with the right questions. These questions identify the important decisions about growth based on both obvious and subtle impacts. For example, will the costs of our school system change as a result of new development? Will new residents expect a different level of public service than is currently provided? How much will local tax revenues increase, and who would receive the additional revenues? What happens to the tax base after a building boom is over? (See Appendix A for a set of questions to help you begin evaluating development.) A look at three typical communities illustrates their different experiences with growth and highlights some of the critical issues for communities to consider.

The following three case studies—Lancaster County, Pennsylvania; Kansas City, Missouri; and Portland, Oregon—are representative of the experiences of communities across the country. The first two case studies show the unanticipated drawbacks of rapid growth. The third case study shows that with smarter growth, new investments add value to existing communities.



Preservation of rural character is a challenge.

DEVELOPMENT IN SEMI-RURAL AREAS: LANCASTER COUNTY, PENNSYLVANIA

Historically, Lancaster County had been beyond the reach of eastern urban centers. But in the 1980s, with better highway access, the area had become a magnet for urbanites who longed to live in the country and were willing to commute to places as far away as Harrisburg, Philadelphia, New York, Wilmington, Baltimore, and Washington, D.C.

The transformation from agricultural to suburban community progressed rapidly. In the ten-year period from 1981 to 1990, population grew by 50 percent, construction rates were up 300 percent, and the number of outlet stores jumped from 17 to 150. This growth in residential and commercial land use resulted in a loss of 50,000 acres of farmland and jeopardized the county's agricultural production, worth \$800 million per year. It also threatened the county's rural character, its natural beauty (a draw for prospective businesses), and its culture (the source of its \$400-million-per-year tourist trade).

The area's culture bears the imprint of the Plain Sect people, the Amish, and Old Order Mennonites, who have lived and farmed here for two and a half centuries. The changing way of life, rising land prices, and inheritance taxes made it difficult to preserve the family farm and pass it on to the next generation. With land values rising from \$6,000 to \$20,000 per acre, fewer than 1 in 10 newly married Amish couples were taking up agriculture as a way of life.

farther from downtown at a rate of about two miles per decade. In its wake are acres of declining property values that have left many residents stranded.

Inside the golden ring, many parts of Kansas City have seen a decline in population and income. This dual decline has been true for both the older suburbs and the central city. Median family income in more than one-half of the Kansas City suburbs declined even faster than incomes in the city during the period from 1960 to 1990. The combination of falling populations and declining incomes has spread to the commercial sector as well. Empty stores, vacant parking lots, and boarded-up shopping centers dot the city and inner suburbs.

Jobs also have moved with the population. In 1970, nearly three out of every five Kansas City regional jobs were in the core; in 1990, only two out of five were in the core. Suburban community officials have fueled this outward movement of jobs by providing tax breaks, public infrastructure, and other incentives to large commercial and industrial employers. Central cities fight back with tax breaks of their own. In the recent battles over the relocation of Sealright, Black & Veach, Toys-R-Us, and Citicorp to outlying locations, more than 2,800 jobs were at stake. Residential taxpayers on both sides are the big losers when municipalities bid for employers with tax breaks: residents end up paying higher local property taxes to make up for corporate tax breaks. With rapid expansion in the region, more jurisdictions will enter the bidding war.

Even when a jurisdiction succeeds in winning an employer, jobs don't necessarily go to those residents who subsidize corporate tax breaks. Sixty percent of the unionized workforce at the General Motors' (GM) major plant expansion in Kansas City, Kansas, live in Missouri. Meanwhile the residents of Wyandotte County, Kansas, have paid \$1,300 each for the tax breaks given to GM to locate there. As stated in the local newspaper, "Kansas City, Kansas, landed a whopper in 1985 when it won a new General Motors Corporation assembly plant... The taxpayers have been paying for it ever since."⁹

Other policies have also helped to shape Kansas City's growth. Like other large cities, Kansas City used federal tax dollars to build a series of beltways over the last several decades, enabling development on the fringe and abandonment of existing infrastructure. Mortgages insured by the Federal Housing Authority subsidized home purchases in the suburbs, further enabling flight from the cen-

tral city with its declining neighborhoods, aging infrastructure, and shrinking tax base. Central cities often must spend nearly twice as much for public safety as their suburban counterparts and usually can afford roughly only half as much per capita for capital improvements. This imbalance sets in motion a cycle of disinvestment that is difficult to break. This cycle is moving out into the Kansas City suburbs, trailing the golden ring of investment.

During 1995-96, the Metropolitan Development Forum attempted to counteract these forces by bringing together business, political, and community leaders in a yearlong series of meetings intended to promote critical thinking and public understanding of issues affecting the growth and development of the Kansas City metropolitan area. According to the executive director of the Mid-America Regional Council, one of the sponsors of the Forum, "The purpose of the Forum was to inform, not to persuade. The Forum events...presented a range of viewpoints on key issues and opportunities surrounding physical growth and development in our region." The Forum is credited with contributing to progress in several areas:

- Achieving regional accord on the economic development role of tax incentives
- Examining barriers to affordable housing
- Launching "empowerment zones"
- Measuring "vital signs"—neighborhood-level indicators
- Determining transportation needs in the



Abandonment of land and infrastructure contributes to the decline of central cities.

ways, investing in transit instead. In a recent survey, only 14 percent of the region's voters favored expanding the road system over more transit. In two successive measures, voters approved expanding Portland's light-rail system by nearly fourfold, from 15 to 58 miles. Clearly, residents of the Portland metropolitan area have realized that these transit and land-use decisions are not ends in themselves but are the tools with which to build a more livable community.¹¹

The case studies demonstrate growth and development's tremendous impact on a community's economy and environment. Without planning for these impacts, attractive elements of the community—good schools, uncongested roads, sense of community—can be lost. Smart growth recognizes these connections and leverages new growth to improve the community. The features that distinguish smart growth vary from place to place. There is no one-size-fits-all solution. Successful communities do tend to have one thing in common: a vision of where they want to go and of what things they value. Their plans for development reflect these values. Part II of this primer is intended to help communities better understand how alternative development proposals will affect them and their gathering places, resources, and character.

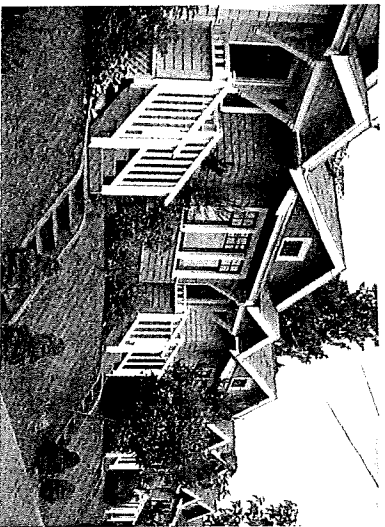
PART II

OUTCOMES OF GROWTH

Making choices about development is a complex process. Communities are often confronted with more than one project at a time, and development alternatives often have interactive or linked effects. Still, it is possible to assess each development proposal against community goals. Equally important is the assessment of cumulative and synergistic effects of a number of development projects over time. This section presents research and analyses, along with communities' own experiences, to create a framework for thinking about the range of effects that growth may cause. Although not a substitute for analysis of specific local situations, this framework is useful in framing the right questions about growth and in conveying the relative magnitude of likely development impacts.

Part II is divided into sections that explore the following areas:

- Local government costs and revenues—such as cost of public services and tax revenues generated
- Economic impacts—such as changes in job availability, access to jobs, and impacts on a community's existing economic base
- Environmental impacts—such as changes in air and water quality, loss of farmland, and availability of habitat and open space



Smaller-lot houses provide housing diversity.

- Community impacts—such as access to services and sense of community.

LOCAL GOVERNMENT COSTS AND REVENUES

Virtually all development requires public facilities and services, but communities often underestimate these needs. Research and experience have shown that a development's impact on local government finances is determined largely by that development's land use, density, location, and user characteristics.¹²

Residential Land Use

Few people realize that most residential development generally doesn't pay its own way. In Prince William County, Virginia, for instance, a local official says, "Every time I see a new house, I look at it and say, there goes another \$1,600."¹³ In community after community and study after study, the results are the same. As a general rule, residential development costs more than the revenue it generates. The main drivers of this equation are number of children (and thus school costs), level of service provided, and value of the property. Number of school-age children is especially important in suburban and rural communities, where the cost of providing education comprises anywhere from 50 to 80 percent of local operating expenditures.¹⁴

The negative impact of residential development on local government budgets is not always recognized because of the timing of costs and revenues. During construction,

South Carolina, is a good example of how mixed-income housing can work. The scattered buildings don't resemble traditional, monolithic, public housing. The porches, materials, and roof lines all look like other Charleston homes. Charleston mayor Joe Riley's dictum is that "there is no reason for government ever to build something that is not beautiful." By designing handsome public housing, the city of Charleston minimized the NIMBY (not in my backyard) problem.¹⁷

Mixing housing types, with large-lot homes next to smaller (less expensive) lots and apartments above commercial uses, can provide housing diversity and fiscal relief. Smaller living spaces are occupied by smaller families, singles, and retired couples. The national trend toward smaller households will make this an increasingly attractive and marketable option for local governments and developers.¹⁸

Non-Residential Land Use

Retail, commercial, and industrial land uses, along with agricultural lands, generally provide positive net revenues to the local government and are often used to balance out the shortfall associated with residential uses.¹⁹

Nonresidential developments appear to be attractive solutions to revenue shortfalls. This is especially true for bedroom suburbs that have "built out." Having relied on the taxes provided by rapid building, they now find themselves desperate for revenue generators. As a result, communities might consider

incompatible uses that they otherwise would not accept. Revenue shortfalls also lead to bidding wars between jurisdictions, with an increasing array of tax breaks and incentives for incoming businesses. But many localities fail to account for secondary impacts of attracting nonresidential development. For instance, new commercial and industrial development frequently attracts new residential development. Rio Rancho, New Mexico, offered a \$114 million incentive package to draw Intel's new semiconductor plant in 1993. By 1994, the town found itself unable to afford schools for the children of the families that came with the plant.²⁰

As shown in a study done for Montgomery County, Maryland (see Table 1), when the impact of employee residences is

BUILDING IT

"Maryland will go bankrupt building the roads, schools, and other facilities needed to accommodate the kind of sprawling suburban growth patterns that have characterized development in the last few decades."

—Maryland Governor Parris N. Glendening²¹

also included, the net tax revenues of nonresidential development may be significantly reduced. For example, the ratio of tax revenues to service costs for a major shopping center is about \$2.14 for every dollar of local government service required. But when the taxes and service costs of the residences of the shopping center employees are included, the ratio drops to \$1.00 of revenue for each local government dollar spent.²²

Thus, to be successful, the strategy of attracting businesses must also focus on where employees will be coming from. Are they current residents of the jurisdiction or will they be moving in from outside? Strategies focusing on providing jobs to current residents will almost certainly improve local fiscal position. If employees will be moving in, will they bring higher-than-average incomes or many school-age children? The impact on costs and revenues will also be affected, as Rio Rancho found, if the developer receives tax breaks as an incentive for building in the community. If the community does not collect enough revenues to cover the costs of providing local services, it must either recover these excess costs from other properties in the community or reduce services.

Location

Service costs are affected both by land-use characteristics within the development and by the development's location relative to existing communities. Locations far from existing communities are often referred to as "leapfrog."

Density

Local government revenues and costs are also affected by how close together developments are built—or how densely land is developed. The density of American cities has dramatically decreased over the past 20 years. Density has effects on both up-front costs and ongoing maintenance costs. Here we consider these two types of costs separately.

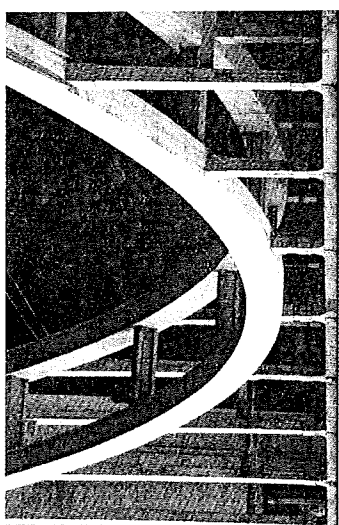
Capital Costs—The effect of density on capital costs for neighborhood infrastructure is well documented.²⁹ Increasing density generally results in capital cost savings for roads, water and sewer, and other neighborhood-scale infrastructure. Shorter runs between houses translate into infrastructure cost savings. And where houses are connected, shared walls reduce materials costs. Because the developer generally pays for the neighborhood-level infrastructure, these costs (within the development) are borne by the developer and the home buyer. Some localities effectively prevent private cost savings by prohibiting development densities over a certain threshold or by requiring certain spacing between houses that precludes clustering options. As Table 2 demonstrates, these costs are not inconsiderable.

In subdivision development, these costs are borne by the private sector. Thus, the density within a new subdivision does not have a large effect on local government capital costs. Revenues, however, are a different story. Although it might not accrue capital cost savings, a municipality or county that clusters its

development may save substantially more agricultural land than its lower-density counterpart. As mentioned, agricultural land generally provides a positive net revenue to local governments.

Operation and Maintenance—Operations and maintenance costs generally account for 80 to 85 percent of local government costs.³⁰ Like capital costs, operations and maintenance are also affected by development density. Much remains to be learned about exactly how costs and revenues are affected. Intuitively, we might expect servicing higher-density development to be cheaper. However, study results yield conflicting conclusions. Some evidence suggests that higher densities are associated with higher per-capita operations and maintenance costs for local governments, at least for certain services.³¹ At very low densities, some costs, such as private wells and septic systems, may be shifted from the local government to the individual homeowners. On the other hand, costs of some services, such as school transportation costs³² and water and sewer operations, can be higher for low-density developments where these services are centralized.³³

Several questions still need to be answered. What is the effect of urban form on operations and maintenance? How do levels of service change? Given these uncertainties and in some cases conflicting findings, it is difficult to calculate density's ultimate impact. One thing is clear, however: today's service costs are likely to change with changing development and are therefore poor indicators of costs in the future.



Operating and maintaining infrastructure account for a large share of local government costs.

Net Effects on Costs

Some studies have sought to capture the net effects of differing growth patterns (including location, density, and land uses). Their results support the individual findings discussed above. For instance, a study of two alternative growth patterns in New Jersey found that following the current dispersed pattern of growth would cost approximately 9 percent more in infrastructure capital costs than following a planned development pattern.³⁴ Other studies by Frank³⁵ and Duncan³⁶ have found similar outcomes (see Table 3).

ECONOMIC IMPACTS

Market Economics

It is frequently argued that current patterns of growth and development in the United States are simply the results of consumer preferences. Any attempt to affect how growth

interest and property tax payments and by capital gains tax deferrals. It is estimated that these combined subsidies were worth \$83.2 billion in 1995.³⁹ How do these subsidies affect development patterns? By creating a tax advantage for the purchase of larger, more expensive housing, these subsidies tend to favor new, low-density developments located outside the central metropolitan core.⁴⁰ In 1993, for instance, households with annual incomes over \$100,000 received 38.9 percent of homeowner subsidies even though they represented only 5 percent of the population.⁴¹

In addition, although Section 1034 of the tax code was recently changed so that capital gains taxes on most home sales have been eliminated, the code helped create our current patterns of development. Section 1034 allowed home sellers to defer capital gains tax liabilities when buying a home of equal or greater value, creating an incentive for sellers to move to a more expensive home to gain a tax advantage. Bier and Maric estimated in 1994 that because of Section 1034, movement outward by home sellers in the Cleveland area was 16 percent greater than would otherwise be expected.⁴²

Utility Pricing

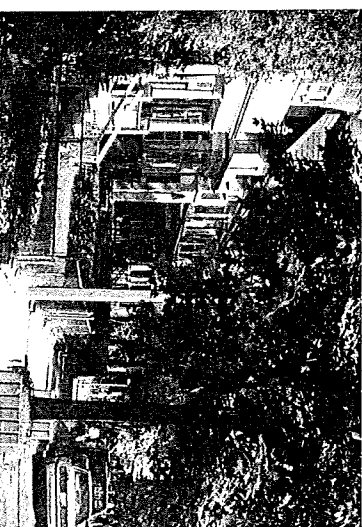
Low-density developments generally enjoy subsidized utility costs because utility pricing is based on average, rather than actual, costs of providing services. Cable television, development impact fees, and electric, phone, water, gas, and wastewater services all charge

on an average-cost basis. For example, one regional Bell telephone operating company provided a rough estimate that, compared to the monthly costs of serving customers in the central business district, it costs twice as much to serve households in the rest of the central city and 10 times as much to serve households on the urban fringe.⁴³

Because all customers pay average costs, residents in more urban, higher-density areas subsidize those on the fringe. The same principle applies to development impact fees. Many jurisdictions have begun charging fixed development impact fees, regardless of the cost of serving the development. One official of a large western city reported that it costs the city \$10,000 more to serve a house on the urban fringe than a house in the urban core.⁴⁴ However, when these fees are based on average costs, each developer pays the same amount. This same phenomenon holds true to varying degrees for electric, phone, gas, water, sewer, and other linear services.

Capital Costs of Water and Sewer

Good water and sewer service facilities are a prerequisite for development. Historically, the federal government has heavily subsidized the building of new water and sewer facilities with grant programs and revolving loan funds. Between 1972 and 1990, federal investments in wastewater systems, dispersed through the Construction Grants Program, totaled more than \$60 billion.⁴⁵ These funds were available primarily for building new infrastructure



Home ownership is one of our shared national goals.

rather than for operating or maintaining of existing infrastructure. The combination of grants for new infrastructure and the lower maintenance costs in new systems encourages growth at the fringe.

Infrastructure spending patterns within a jurisdiction have also played an important role in subsidizing development at the fringe. Myron Orfield, a member of Minnesota's House of Representatives, found that 23 percent of the existing sewer service area in Minneapolis in 1990 had less than capacity use. Rather than directing growth to this area, between 1987 and 1991 the region provided new capacity to 28 square miles of land at a cost of \$50 million per year. The capacity went primarily to serve expansion into the affluent suburbs. Orfield calculates that by 1992, the central cities were paying over \$6 million annually to subsidize the flight of their middle class.⁴⁶

capita and rural areas took in \$98 per person. The study points out that this spending pattern prevailed despite transportation legislation that had a monetary set-aside for urban areas.⁵²

Cumulative Effects of Subsidies

It is difficult to predict the cumulative effect of these different subsidies on a particular development. Archer quantified some of these subsidies for one leapfrog development in Lexington, Kentucky. The results, presented in Table 4, show that for a 200-acre development, subsidies amounted to \$99,334 in 1973 dollars.⁵³

Archer's study is an illustrative example only and does not account for many of the factors discussed above. It demonstrates that development is not simply the free market efficiently responding to consumer demands. Rather, in addition to consumer preferences, development is influenced by a number of nonmarket factors.

Consumer Preferences

Any investigation of the market's influence on development patterns would be remiss without a discussion of what consumers want. Consumer choices are based on a number of factors. Typically, consumers consider price and proximity to work, family, or schools. They also might consider transportation options, local services, long-term investment value, and flexibility of space. Not surprisingly, a wide variety of preferences exists.

Indeed, in a market survey conducted by the market research firm American Lives,

prospective and recent home buyers were asked about their preferences for types of neighborhoods and amenities. Specifically, the survey looked at the market potential for neighborhoods that reflect the traditional town model typical of pre-1950 development patterns. The survey results are shown in Table 5.

The market researchers concluded from these and other data that consumers are not happy with the current styles of development and that conventional suburbs are no longer a safe bet. They note further that a major objection to more traditional town-like development is density. Lower densities are perceived to

WHO PAYS THE BILL?

Firms locating in outer suburban areas reap most of the benefits, while most of the costs...are borne by unemployed city residents, commuters who bear the cost of congestion, accidents, and pollution, and taxpayers who foot the bill for subsidies for transportation, home ownership and other public subsidies.⁵⁴

solve the problems of noise, safety, privacy, and convenient access by car. The study's authors believe that these objections can be overcome with smart design that combines, in very specific ways, elements of the old and the new.⁵⁵

Though more examples are needed, sales figures from recent projects provide support for this view. A study of six developments in the Southeast United States—incorporating higher densities, strong public spaces, and a mix of uses—showed returns of 25 to 45 percent compared with 9 percent for more standard projects.⁵⁶ The Woodlands, a master-planned community in Houston, Texas, incorporates a mix of incomes, keeps housing and jobs together, and preserves the site's environmental features. Compared to other master-planned communities in the Houston region, the Woodlands has ranked first in annual new home sales every year since 1990.⁵⁷

Consumers' desires will change as demographics and values change. American Lives' data indicate a growing desire for community, open space, and town-centered living with less reliance on the automobile. Demographic shifts underlie and support these trends. The "typical" family—a married couple with children—described 40 percent of all households a generation ago; it now accounts for only 26 percent.⁵⁸

Currently, a full third of the home-buying market is over the age of 45.⁵⁹ In surveys of this market segment, most people want to live in communities with a diversity of ages. Three of their top four location priorities are based on

easy transportation: access to shopping, access to family and friends, and access to medical care. And of mature home buyers who intend to move, most will move to smaller houses with smaller yards to reduce cleanup and yard-work.⁶⁰ Mature buyers' preferences, in combination with the overall trend in the United States toward smaller households, will create a greater market for smaller houses on smaller lots—especially where density's perceived problems can be solved through smart design.

GROWTH AS AN ECONOMIC DEVELOPMENT STRATEGY

Many local jurisdictions have come to equate attracting new business with improving the location's economy. As Rio Rancho, New Mexico, did, some cities have found that when all the impacts are taken into account, the new business does not have the promised economic development value.

Sometimes development represents a net increase in economic activity, but it may also simply shift economic activity from one area to another. The new shopping mall on the edge of town may result in the closure of shops downtown. Since many smaller stores, like those near Portland's light rail, rely on the foot traffic created by a successful group of stores, when a few close, the entire area may fail. Thus, the new jobs created by development may simply be a transfer from one area to another, and they certainly call for high levels of scrutiny when public subsidies are being considered.

HISTORIC PRESERVATION IN MARYLAND AND VIRGINIA

*Studies of Maryland's tax credit show that it will create \$9.7 million in investment, add 122 jobs worth \$11.3 million in wages, and increase property values by \$2.4 million. Already residential renovations caused property values within a historic district in Fredericksburg, Virginia, to rise 674 percent between 1971 and 1990 compared with homes outside the district, which rose 410 percent.*⁶¹

Many communities have refused an "either/or" attitude and have turned this problem on its head by providing incentives for locating "big-box" stores and other major retail chains downtown, thereby increasing competition and adding value to the existing retail chains with increased pedestrian traffic. One example of this strategy is Recreational Equipment Incorporated's (REI) decision to build its new, im-

novative flagship store in central Seattle, rather than in an outlying mall. In Carroll, Iowa, a Wal-Mart agreed to locate downtown instead of at the fringe and to pay for half the cost of a new parking lot that could be used by everyone, not only Wal-Mart customers. Other national retailers have followed Wal-Mart's example, strengthening Carroll's economic vitality.⁶¹

For an economy to truly develop, local governments must also be cognizant of the nonmarket costs associated with different development patterns. For instance, will a mall on the fringe cause greater or reduced congestion and air pollution? Will it add to or detract from the community's social fabric? Is the downtown a focal point for the community? Does it define the community in any way? These "livability" factors are increasingly important in attracting mobile high-tech businesses. A study of the factors that anchor people to their home communities found a correlation between strong small businesses and a high level of civic engagement in small towns. The study concludes that the "social capital" of a community "enhances [the] community's ability to compete for jobs and residents."⁶²

To further investment in existing communities and create and preserve social capital at the same time, some states have turned to direct incentives for historic preservation. This shift makes sense especially in communities in which tourism and related activities, such as conventions, are a major source of employment and tax revenues. Seven states currently have

pounds released into the air each year.⁷⁰ Technological approaches such as catalytic converters and reformulated gasoline have reduced the impact of automobile-related air pollution and have improved air quality dramatically. However, the Environmental Protection Agency predicts that increases in vehicle miles traveled will begin to erode these gains within the next eight years.⁷¹

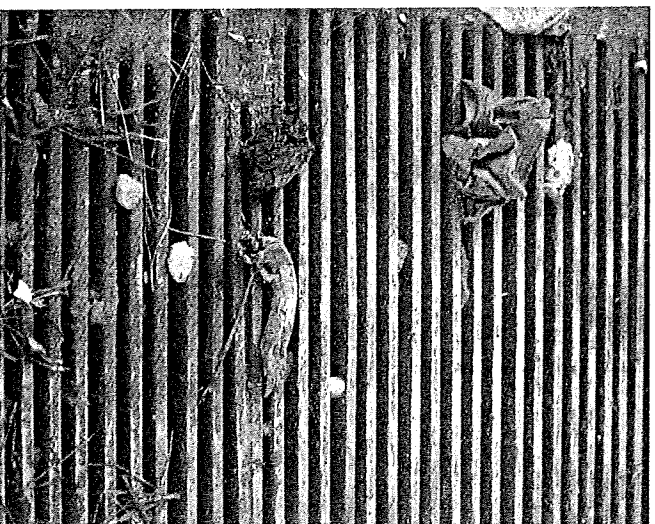
Compact, mixed-use, pedestrian, and transit-oriented communities have a positive impact on air quality by providing convenient travel alternatives. The Nationwide Personal Transportation Survey of 1990 shows that households in city centers take 18 percent fewer trips, make on average 18 percent shorter trips, and travel 36 percent fewer miles.⁷² City center residents not only reduce “cold starts” (starting the car when it hasn’t been used for the past few hours), a major source of ozone pollution, but also cut vehicle miles traveled, further reducing smog-forming emissions.

Studies of growth patterns in Portland predict that following a strategy of mixed uses with transit- and pedestrian-friendly design would lead to 7 percent fewer vehicle trips and vehicle miles traveled, less congestion, and reductions in nitrogen oxide, hydrocarbons, and carbon monoxide.⁷³ A similar study of the Washington, D.C., region conducted by the Chesapeake Bay Foundation and Environmental Defense Fund also showed that reductions in congestion, vehicle miles traveled, and vehicle trips were achievable.⁷⁴ Critical factors in

generating trip reductions appear to be a good balance between jobs and housing and a mixture of uses, including retail and office centers.⁷⁵

Water Quality: Urban Runoff

Streets, parking lots, rooftops, and other impervious surfaces all contribute to urban runoff. Parking lots generate almost 16 times as much runoff as an undeveloped meadow.⁷⁶ As the amount of paved and covered surfaces within a watershed grows, stream beds are widened, flooding is increased, and groundwater recharge is reduced. As the amount of impervious surface within a watershed rises above 10 percent, impacts on local water



Impervious surfaces contribute to urban runoff.

bodies are significant. Beyond 30 percent they are quite damaging.⁷⁷ The most recent National Water Quality Inventory reports that runoff from urban areas is the leading source of damage to estuaries and the third largest source of water-quality damage to lakes.⁷⁸

Total runoff can be reduced by clustering development and leaving larger open spaces and buffers. Although compact development generates higher runoff and pollution levels within the development, it is more than offset by reductions in the undeveloped areas. A study comparing growth scenarios for a town in South Carolina found that runoff from the spread-out, large-lot scenario was 43 percent higher than the compact “town” scenario. In addition, sediment, phosphorous, nitrogen, and other pollutants leaving the site were reduced.⁷⁹

Water Use

While water tends to be plentiful in the eastern and southern parts of the United States, many areas in the western states suffer from periodic or chronic water shortages. One way to reduce water usage is to encourage compact developments. Because they have relatively smaller areas of turf and landscaping, which are major sources of water demand, compact developments require less water. A major study in New Jersey estimated outdoor water use by housing type. The study found that larger, single-family detached units consume 30 gallons of water per day for outdoor use, 6 times the amount that single-family attached or multi-family units use. In rural areas,

COMMUNITY IMPACTS

Each place has its own story. Urban cores such as downtown Columbus, Ohio, live with the consequences of disinvestment, population decline, and concentration of poverty. Residents know firsthand the effect this decline has on their community. Longtime residents remember when all the neighbors knew each other and took care of their properties. Since 1960 the area has lost three-fifths of its population and, in 1990, their neighborhood was the poorest in Columbus. As jobs have moved to the suburbs, workers in the older areas of the central city found it increasingly difficult to get to where the jobs are, exacerbating decline.⁹² Formerly perceived as an urban problem, now many suburbs find Columbus's story is increasingly familiar. Seeing disinvestment headed their way, suburbs around Cleveland have formed a group called First Suburbs to encourage investment in existing communities.

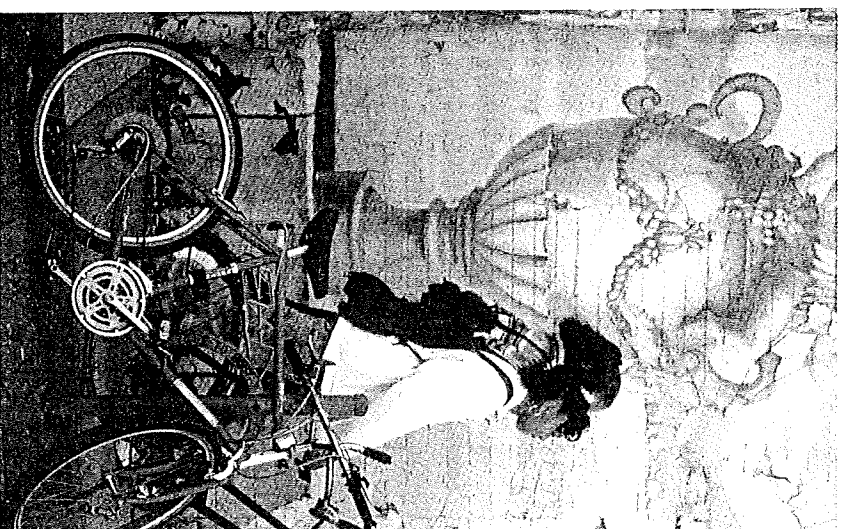
But even when suburbs are economically healthy, many residents believe that their community fabric is weak. A recent article in *American Enterprise*, "Are Today's Suburbs Really Family-Friendly?" argues that typical suburban development is "desirable for families not so much for what it is as for what it isn't: it is not dangerous, not dirty....It offers more physical security than cities and greater economic security than the average small town."⁹³ The article states that suburbs isolate those without cars—the elderly, the young, and the infirm. The neg-

ative impacts of isolation on these groups is well documented.⁹⁴ When the *Wall Street Journal* asked one suburban mother what social reform would most improve her quality of life, she replied, "Lower the driving age to 10." She had put 40,000 miles on her minivan in the previous 18 months ferrying her three kids around the suburbs.⁹⁵

New development, and how it occurs, profoundly influences community life in towns and rural areas as well. In Lancaster County, Pennsylvania, the strong cultural traditions of the Amish community were rapidly diminished by the influx of new residents. The charm and slow pace of a 200-year-old agricultural community were rapidly worn away by increasing tourism and outlet malls. The sense of place, commitment of families to the land, and authentic Amish traditions that attracted new residents to this part of Pennsylvania 10 or 15 years ago no longer provide the same central focus for the community. Along with the loss of more than 50,000 acres of prime farmland to residential and commercial development, the residents of Lancaster County have also had to give up a large measure of the distinctive cultural heritage for which their community was famous.⁹⁶

Putting the Pieces Together

Clearly, growth and development can cut two ways. Growth can improve quality of life by adding services, creating opportunity, and enhancing access to amenities. It can also



Community life in a pedestrian neighborhood of Toronto.

drive disinvestment, reduce competitiveness, and degrade the environment. Businesses, community leaders, developers, and local governments need to work to ensure that new growth improves the economy and environment of existing communities. In building new places, we must build places people want to live in for what they are, rather than for what they are not. This is smart growth.

APPENDIX A

STARTING POINT: THE BOTTOM LINE

The following set of questions is a tool to help identify which kinds of impacts your community might need to address. The questions apply to a single development or to policy, and they cover a range of fiscal, economic, environmental, and social factors. The questions also address both short- and long-term impacts. The relative importance of each question depends on the particular goals of your community.

FISCAL: IMPACTS ON COSTS OF SERVICES AND REVENUES

1. How will this project change our school system?
 - a. By how much will the costs change and will the development affect state grant formulas?
 - b. Will there be more children to educate, and can the current school facilities accommodate the increased number of students?
 - c. Will the new residents expect a different level of education than currently provided?
2. Will other public services change as a result of this project?
 - a. By how much will the costs change?
 - b. In particular, will there be a greater need for police and fire protection?
3. Will infrastructure costs (such as water, sewers, and roads) change due to this project?
 - a. Can or should individual wells and septic systems be replaced with publicly provided water system and sewage treatment?
 - b. Will the current systems need to be enlarged to provide greater water and sewage capacity? Road capacity? Other infrastructure capacity?

4. Will local tax revenues increase as a result of this project?
 - a. If so, by how much?
 - b. Who would receive the additional revenues—the municipality, the county, or the state?

5. Will the project “pay for itself”?
 - a. In other words, will the tax revenues that the project generates cover the costs of the additional services needed—at each level of government?
 - b. Is there a need for impact fees (or other forms of payment) to cover the additional costs?
 - c. Can impact fees be defended in court?

ECONOMIC: IMPACTS ON THE LOCAL AND REGIONAL ECONOMIES

6. Will the project make the community more competitive in a commercial sense and more attractive to other businesses?
 - a. How many jobs will the project create?
 - b. Will these be high-paying, stable jobs?
 - c. Will the project encourage other new businesses?
 - d. Will the project increase personal income in the community?
7. What will be the project’s impact on the cost of housing and property values in the community?
8. Will the project have a negative effect on other communities in the area?
 - a. Will the jobs created employ people in this community or draw commuters from other areas?
 - b. Will the project simply shift activities from one part of the area to another without creating new jobs?

APPENDIX B

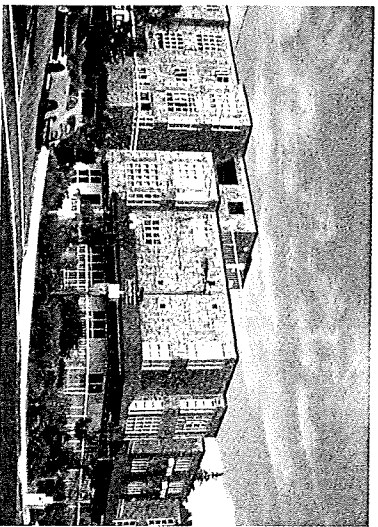
TOOLS TO SHAPE GROWTH PATTERNS

As a preview of what the Smart Growth Network plans to offer, this section presents some of the many alternative growth patterns and tools for communities and local governments.

ALTERNATIVE GROWTH PATTERNS

Market researchers are finding that consumers are not happy with the current styles of development and that conventional suburbs are no longer a safe marketing bet. They note further that a major objection to more traditional town-like development is density. Lower densities are perceived to solve the problems of noise, safety, privacy, and convenient access by car. These problems can be overcome with “smart design” that combine, in very specific ways, elements of the old and the new.³⁷

Two widespread alternative physical approaches are infill development and neotraditional development. These approaches tend to be of higher density with less emphasis on the automobile than conventional development patterns. These development patterns use urban design, architecture, and open space to shape higher densities into pleasing



Mixed-use infill built on the site of an old gas station.

and desirable neighborhoods. Although infill and neotraditional development are explored below, they are only two of the many possible approaches that can result in smart growth.

Infill

Infill intensifies current development patterns in existing neighborhoods. Infill often saves a community money by making better use of existing infrastructure so that the community can make other investments in amenities such as open space, education, or crime prevention. Greater population densities resulting from infill can also support both neighborhood businesses and a wider range of choices with respect to public transportation.

In some instances, infill may occur on brownfields. As defined by the U.S. EPA, brownfields are abandoned, idled, or underused industrial and commercial facilities where expansion or redevelopment is complicated by real or perceived environmental contamination. Brownfield redevelopment encourages environmental cleanup, brings jobs to underemployed communities, revitalizes deteriorating neighborhoods, and counteracts sprawl. Examples of infill sites on brownfields include overlooked, underdeveloped, or vacant parcels in an area with existing infrastructure. The presence of pre-existing infrastructure for transportation and other services facilitates infill.

Neotraditional Communities

A growing trend in urban design has been toward neotraditional development, or “new urbanism.” These forms of development are based on traditional, small American towns with strong civic centers. Neotraditional development can occur as infill or in place of new subdivision development. The new urbanism wears many faces, ranging from the glossy resort village of Seaside, Florida, to the neighborly Kentlands in Gaithersburg, Maryland. These neotraditional communities share many common goals:

- Return to pedestrian or “village” scale
- Decreased reliance on the automobile
- Smaller streets in grid patterns
- Shallow front yards with porches
- Greater efficiency of public infrastructure
- Reduced energy consumption
- Multiple-use development in compact neighborhoods
- A vital town center

they are not a new idea (Portland, Oregon, established a UGB in 1979), UGBs have been receiving more attention recently.

Infrastructure Investments That Shape Development—As described in Part II, the availability of highways, public transit, and water and sewer lines can encourage development in one location versus another. Therefore, decisions about where, when, and what kind of infrastructure to build are decisions about the location, form, and timing of development. Development patterns are influenced by small infrastructure decisions as well as major policies such as Portland’s commitment to its public transit system.

Defining a Community’s Vision—In many large cities, such as Seattle and Baltimore, and in smaller ones as well, the process of defining the community’s vision and goals is well advanced. Although each community differs in the content of its plans, almost all of the plans rest on a clear statement of principles and/or values that the community as a whole wants to preserve and enhance. These principles are usually developed collaboratively by a diverse group; they are general enough to be inclusive and relevant to different groups, but specific enough to acknowledge the unique character and resources of the region (for example, Seattle’s commitment to conservation of natural resources, with particular concern for preventing the further loss of Pacific salmon populations). This collaborative process also builds political will and a constituency for making the vision a reality.

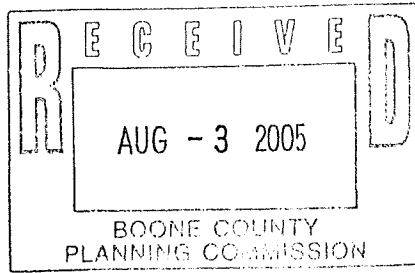
Development Impact Assessment—Increasingly, communities are using formal impact assessment techniques to determine whether a development will move them toward their goals. Some states, like California, mandate these assessments through a state environmental quality act. The areas usually addressed in impact analyses are fiscal, traffic, public facility, and special impacts (such as air quality, noise, and exposure to particular hazards). To get the most out of impact analyses, a community can:

- Develop a screening process and publish the results for all developments
- Use extensive impact analysis for only significant projects, not for minor ones
- Develop in-house capacity
- Try to minimize delays in the development approval process by establishing deadlines for reviews and local decisions.¹⁰⁰

Impact analyses are gaining popularity because communities have realized the importance of knowing where growth is taking them. For most communities, impacts are measured against informal goals that already exist and share wide acceptance—fiscal soundness, good schools, and public and private investments that hold their value. By making goals explicit, the process becomes more democratic and also allows individuals, community organizations, and governments to prioritize their actions. Citizens can then better hold their governments and others accountable by measuring progress toward identifiable milestones.

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- ⁴³ U.S. Congress, Office of Technology Assessment, *The Technological Reshaping of Metropolitan America*, Washington, D.C.: U.S. Government Printing Office, 1995. OTA-ETI-643.

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- ⁷⁵ Reid Ewing, "Characteristics, Causes, and Effects of Sprawl: A Literature Review," *Environmental and Urban Issues*, FAU/FIU Joint Center, Winter 1994.
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- ⁷⁷ Chester L. Arnold and James C. Gibbons, "Impervious Surface Coverage: The Emergence of a Key Environmental Indicator," *Journal of the American Planning Association*, Spring 1996: 246.
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August 2, 2005

Charles, Viola, and Carolyn O'Donnell
(Property Owners)
225 Walton-Nicholson Road
Walton, KY 41094

Joan O'Donnell
(Property Owner)
539 Walton-Nicholson Road
Walton, KY 41094

Mitchell A. Light, Asst. Zoning Administrator/Enf. Officer
Boone County Planning Commission
2995 Washington Street
Burlington, KY 41005

Dear Mr. Light:

This letter is in regards to the Public Hearing to be held on Wednesday, August 3, 2005, at 7:30 p.m. with the Boone County Planning Commission for public opinions and questions regarding the request of James W. Berling (applicant) for Daniel Hance, Evelyn Hance, George Anderson, and Sara Anderson (owners) for a Zoning Map Amendment from Agricultural Estate (A-2) to Suburban Residential Two (SR-2) for a 48-acre area located at 247, 273, and 293 Walton-Nicholson Road, Walton, Kentucky, to allow for the Boone County portion of a subdivision, for single family residences, that will be located in both Boone and Kenton Counties. Due to work and family commitments, we will not be able to attend the Public Hearing but request that our opinions and questions in this letter be entered for consideration into the record of the Public Hearing.

We feel there are several concerns that need to be addressed in your consideration of this request for a Zoning Map Amendment on this property.

One of the major concerns regards the density of this proposed subdivision and the increase in the amount of traffic this will bring to Walton-Nicholson Road, a road that already has more traffic than it can safely handle. This road is already getting 200-250 vehicles per hour one way (total of 400-500 per hour both ways). This has been counted from the front porch of one of our residences. This road has already had major accidents, resulting in deaths of drivers/passengers, as well as the airlifting of injured drivers/passengers to hospitals. With the density of this proposed subdivision, this causes great concern and we question how this road can handle the increase of vehicles that will be traveling on it, considering the fact that we are looking at there being at least two people per residence in this subdivision at the minimum end of the estimate, and more likely, four plus per residence. This road is already at so high a capacity of

vehicles, at 55 MPH, that residents on this road are afraid to let their children play in their front yards due to the high speed, the accidents, and vehicles running off the road into their yards, knocking down mailboxes, utility poles, and trees, etc. If we add the traffic volume to this road that this subdivision projects (not only with the additional volume of residents traveling it, but also with their visitors, additional delivery vehicles, etc.) going to and from these residences, we feel there is a major concern for not only how the road is going to hold up, but most importantly the safety of the residents already living along this road, as well as the people traveling this road daily. We also feel that just reducing the speed limit on this road (which several residents have agreed does need to be reduced) will not improve the prospect of the density of this project, because the added volume of traffic will then only cause backups on this road, which may lead some to propose the widening of this road, which would involve the Highway Department and where to get the finances for such a project and how far in the future this could even be done. Then, with any consideration of widening the road comes the fact that some residents who already live on this road will lose their houses or parts of their yards so the road can be widened.

We have heard that the plan may be to make another road through the proposed subdivision all the way over to Percival Road. The one end of Percival Road leads to Church Street and into Walton, where consideration must be given to the fact that the railroad tracks must be crossed to get into Walton, which leads to the increased risk of accidents at the crossing due to the higher volume of traffic, as well as the fact that this increase in daily traffic would then be going off of Church Street onto Main Street in Walton, where another consideration must be given to that intersection's ability to handle that volume of traffic. The other end of Percival Road, which leads back to Walton-Nicholson Road, is a narrower road that could not withstand that amount of traffic either, which would also put those residents and the children living along that road in more danger, and we feel this must also be taken into consideration.

Another concern that the residents have along Walton-Nicholson Road regarding the density that this proposed subdivision would bring is the noise factor. Walton-Nicholson Road is a quiet, county, residential/agricultural area where a lot of the residents have chosen to live for this very reason, which the density of this proposed subdivision will significantly diminish. The road noise alone at the present time is high enough, and this proposed subdivision will only add to the noise. This proposed subdivision is not even near the main downtown district of the City of Walton where the residential density is higher, but is actually being proposed in a lower density residential/agricultural area. We have spoken with several of the residents (in both Boone and Kenton Counties) whose properties join the land involved in this Zoning Map Amendment request, as well as other residents who live along Walton-Nicholson Road. The majority of us agree that we would not like to see a subdivision developed on this property at all, but since we have learned about the density of the subdivision projected for this property, our concerns have significantly increased regarding the ability of this road and this area to be able to handle this density.

Another concern with the density of this project is the ability of the Walton-Verona Independent Schools to handle the influx of students from this proposed subdivision. With the new subdivisions and buildup already going on in this school district, we feel this must be taken into consideration. The only way to handle the influx of new residents with children is to build a new school. Where is the school district going to get the money to build a new school? Obviously, at least a portion of the money comes from taxes collected from the residents, but we know it will not just come from taxes from the new residents. The increased tax burden will also come from the current residents of both Boone and Kenton Counties on taxes

on property, vehicles, utilities, etc. , which leads to the question of how will this affect our tax base?

Another concern which we feel must be addressed is the burden added to the police and fire/emergency departments in this region for both Boone County and Kenton County and the City of Walton and whether these departments have the personnel/staff to handle the capacity of the density of this proposed subdivision or have the finances to increase the personnel/staff needed to handle this, because we all know that with the increase in population in an area comes the increase in crime, accidents, and emergencies. Of course, this leads back to the need for additional finances for these departments to handle this increase, which leads back to an increased tax burden on the residents of these two counties.

It is obvious that a major concern with this requested Zoning Map Amendment and proposed subdivision for the above-mentioned property is the density of this project and the inability of this road and area to handle this project.

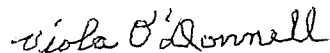
These are some concerns and questions that we have as residents of Walton-Nicholson Road that we request be entered for consideration into the record of the Public Hearing regarding the above-mentioned Zoning Map Amendment request that is being presented to the Boone County Planning Commission.

Sincerely,

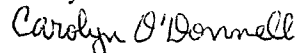
Charles O'Donnell



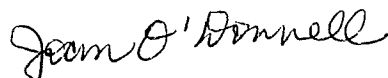
Viola O'Donnell



Carolyn O'Donnell



Joan O'Donnell



**BOONE COUNTY PLANNING COMMISSION
BOONE COUNTY ADMINISTRATION BUILDING
COURTROOM 3A
BUSINESS MEETING
September 7, 2005
7:00 P.M.**

Mrs. Poston Vice Chairperson, called the meeting to order at 7:02 PM.

COMMISSION MEMBERS PRESENT:

Mr. Randy Barlow
Mr. Greg Breetz
Mr. Kim Bungler
Mr. Jim Carmichael
Mr. Don McMillian
Mrs. Susan Poston, Vice Chairperson
Mr. Bob Schwenke
Mr. Earl White
Mrs. Lisa Wilson, Secretary/Treasurer

COMMISSION MEMBERS NOT PRESENT:

Mr. Arnold Caddell, Chairman
Mrs. Janet Kegley
Mr. Richard Knock, Temporary Presiding Officer
Mr. Robert Newman
Mr. Randy Poe
Mr. Charlie Reynolds

LEGAL COUNSEL PRESENT:

Mr. Dale Wilson

STAFF MEMBERS PRESENT:

Mr. Kevin Costello, AICP, Executive Director
Ms. Jan Hancock, Secretary
Mr. Mitch Light, Assistant Zoning Administrator/ZEO
Mr. Kevin Wall, AICP, CDT – Director, Zoning Services

Mr. McMillian moved that the salaries, benefits, and bills due be approved and paid as presented; and indicated approval of those items which have been paid. Mrs. Wilson seconded the motion and it carried unanimously

ACTION ON PLAN REVIEWS:

1. **Zoning Map Amendment**

The request of James W. Berling (applicant) for Daniel Hance, Evelyn Hance, George Anderson and Sara Anderson (owners) for a Zoning Map Amendment from Agricultural Estate (A-2) to Suburban Residential Two (SR-2) for a 48-acre area located at 247, 273, and 293 Walton-Nicholson Road, Walton, Kentucky. The request is for a zone change to allow the Boone County portion of a subdivision for single-family residences that will be located in both Boone and Kenton counties.

Mrs. Poston stated that the vote in Committee on this request was a tie. When there is a tie vote in Committee, the Planning Commission's procedure is to read both sets of Findings of Fact. The first version read will be the one that reflects the vote of the Chairperson. The Chair will entertain a motion based on either set of Findings of Fact and if that motion is defeated, the Chair will entertain a motion to accept the other Findings of Fact. She stated that Mr. Barlow was Chairperson of the Committee and the Findings of Fact that represent his vote will be presented first.

Staff Member Mitch Light presented the Findings for Approval subject to conditions (see Berling/Hance/Anderson Zone Change Findings for Approval). The property owners have signed the letter agreeing to the conditions. Mr. Light then presented the Findings for Denial (see Berling/Hance/Anderson Zone Change Findings for Denial).

In accordance with the Planning Commission's new procedure, Mrs. Poston allowed the applicant up to five minutes to summarize their position.

Attorney Gerald Dusing stated that the basis for the zone change is Section 308 of the Zoning Code, Finding #2 that the existing zoning classification is inappropriate and the proposed zoning classification is appropriate. He stated that the Northern Kentucky Area Planning Commission Staff at the Kenton County zoning hearing found numerous reasons why the current zoning classification of A-1 was not appropriate, including the proximity of the site to the city of Walton and the possibility that the site would be annexed into the City of Walton, the availability of utilities, and that KY 16 with its topography was suitable for residential development. He stated that the requested zoning is appropriate because there are existing substantial residences along Walton-Nicholson Road. Walton-Nicholson Road is an excellent road for passenger type vehicles. The proposed residential

subdivision does not intersect or interact with Percival Road, which is too narrow for increased traffic. SR-2 zoning is a reasonable density that makes efficient use of the existing infrastructure and makes it economically feasible to expand the public water and sewer. He stated that Industrial is inappropriate. Many years ago, Industrial in southern Kenton County was drawn with a broad brush and was not meant to pigeonhole this type of small acreage right next to the City of Walton. Following the Comprehensive Plan and zoning the property Industrial, would put over sixty existing homes into an Industrial classification, which is not appropriate. He stated that Industrial belongs on a three- or five-lane road built for tractor-trailers, but Walton-Nicholson Road is a two-lane road with a double yellow line all the way to Nicholson Pike. He stated that the subject area is a natural extension of the residential area in and around Walton and there is a high demand in the Walton area for the type of housing that SR-2 zoning requires. Residential growth for the City of Walton is impeded to the north, west and south by existing commercial and industrial development and the only way residential can develop and the City of Walton can grow is to the east.

Mrs. Poston asked if there was a spokesperson for the opposition who wished to summarize their position at this time. There was no response.

Mr. Barlow moved by resolution to the City of Walton to approve the zone change with the conditions based on the Findings for Approval. Mr. Bunger seconded the motion.

Mrs. Poston, a member of the Committee, stated that the Comprehensive Plan designated this property as future Industrial land. She questioned where we will get industrial land if we use the land set aside for industrial for residential uses. She stated that you do not go into a Residential area and carve out Industrial or into a Commercial area and carve out Industrial. She stated that it is seldom you get a four- or five-lane road going into an area that is not developed. She is opposed to the zone change request.

Mrs. Poston stated that a "yes" vote is a vote to approve the zone change request.

There being no further comments, **Mrs. Poston asked for a roll call vote on the motion made by Mr. Barlow which found Mr. Barlow, Mr. Breetz, Mr. Bunger, Mr. Carmichael, Mr. McMillian, Mr. Schwenke, Mr. White, and Mrs. Wilson in favor. Mrs. Poston was opposed. The motion carried by a vote of 8 to 1.**

2. Zoning Map Amendment

The request of James W. Berling (applicant) for Bessmer Lane, LLC (owner) for a Zoning Map Amendment from Industrial One (I-1) to Suburban Residential One (SR-1) for a 67.82 acre area located south of the property at 115 Bessmer Lane, south of the current terminus of Mullen Lane, northwest of

EXHIBIT

“B”

BERLING/HANCE/ANDERSON ZONE CHANGE FINDINGS FOR APPROVAL

September 7, 2005

The requested zone change from RS & A-2 to SR-2 for 48 acres located at 247, 273 and 293 Walton-Nicholson Road should be approved for the following reason.

1. The applicant adequately demonstrated that the existing zoning classification of RS & A-2 is inappropriate and that the proposed zoning classification of SR-2 is appropriate.

The following conditions are necessary to achieve consistency with the specific goals, objectives, and policies of the 2005 Boone County Comprehensive Plan. The conditions listed below are necessary to mitigate any foreseeable community impacts that may be created by the development. The property owners have signed a letter demonstrating agreement with these conditions.

CONDITIONS

1. The applicant agrees that only single family detached housing will be constructed within the proposed development.
2. The applicant agrees that there will be no individual driveway access onto the main boulevard off Walton-Nicholson Road.
3. The applicant agrees that there will be no lots less than 60' wide.
4. The applicant agrees that sidewalks will be constructed within the proposed development per the *Boone County Subdivision Regulations*.
5. The applicant agrees that there will be no more than 40 zoning permits issued per calendar year for the proposed development.
6. The applicant agrees that the lots fronting Walton-Nicholson Road will have front yard setbacks consistent with neighboring homes along Walton-Nicholson Road.

**BOONE COUNTY PLANNING COMMISSION
BOONE COUNTY ADMINISTRATION BUILDING
COURTROOM 3A
August 3, 2005
7:30 P.M.**

PUBLIC HEARINGS

Commission Members Present: Mr. Barlow, Mr. Breetz, Mr. Bunger, Mr. Caddell – Chairman, Mr. Carmichael, Mrs. Kegley, Mr. McMillian, Mr. Poe, Mrs. Poston - Vice Chairperson, Mr. Schwenke, Mr. White, and Mrs. Wilson – Secretary/Treasurer.

Staff Members Present: Mr. Kevin Costello, AICP, Executive Director; Ms. Jan Hancock, Secretary; and Mr. Mitch Light, Assistant Zoning Administrator/ZEO.

Legal Counsel Present: Mr. Dale Wilson

Mr. Arnold Caddell, Chairman, called the meeting to order at 7:45 PM and introduced the first item on the Agenda:

Applicant: James W. Berling for Daniel Hance, Evelyn Hance, George Anderson and Sara Anderson (owners)

Request: Zoning Map Amendment

The request of James W. Berling (applicant) for Daniel Hance, Evelyn Hance, George Anderson and Sara Anderson (owners) for a Zoning Map Amendment from Agricultural Estate (A-2) to Suburban Residential Two (SR-2) for a 48-acre area located at 247, 273, and 293 Walton-Nicholson Road, Walton, Kentucky. The request is for a zone change to allow the Boone County portion of a subdivision for single-family residences that will be located in both Boone and Kenton counties.

Staff Member Mitch Light presented the Staff Report which included a Power Point presentation (see Staff Report).

Mr. Schwenke left the meeting at this time.

Following an explanation of the Public Hearing process, the Chairman asked for the applicant's presentation.

Mr. Jim Berling, applicant and engineer for the proposed development, stated that the Anderson family and the Hance family, as well as the gentlemen who will be developing the property, are present this evening to answer any questions. Mr. Berling stated that this property is unique in its location and it is especially appropriate for the residential uses they are proposing. He stated that the Long-Term Plan and other studies have identified the area for industrial. He stated that some of his partners in developing this property are also involved with the adjacent parcel (Public Hearing Item #2 this evening) and they believe industrial is not appropriate for this location. He stated that they started in the North Walton Industrial Park five years ago and they have sold three lots. He stated that the industrial use has not worked because of the location, the topography, and the roadway. Mr. Berling asked Staff about the three letters that we received from neighbors. Mr. Light responded that copies of the letters are in the packets and he will submit them. Mr. Berling stated that one of the letters states that Walton-Nicholson Pike had a double yellow line from one end to the other. He stated that the reason for that is that there are no opportunities to pass in a legal manner because of the many curves. He reviewed how trucks would have to travel from the site to get on U.S. 25 and go through the City of Walton to the interstate system and stated that the site is not suited for industrial development, but it is well suited for residential development. He stated that the current zoning is inappropriate and the proposed residential zoning is appropriate. He stated that there are some interconnecting roadways that they have not shown on the plan, but it is a Concept Plan. He stated that they will tie into the adjacent properties to the east, west, and south – they will do whatever is required. They do not know exactly where the neighbors want to tie in, but they will make the tie-ins when the time comes. He stated that the road will be a thoroughfare similar to Triple Crown but going in a north/south direction. He stated that the property is viable because people can cross the railroad on Walton-Nicholson Pike with the new loop built over the top. He stated that money has been approved to extend Mary Grubbs Highway over the railroad so that people will be able to cross down there. He stated that the City of Walton is currently limited in getting across the railroad tracks and connecting a good road like they are proposing from one of the railroad crossings to the other will open the area for a lot of other developments. He stated that they have various lot sizes from 50 feet to 100 feet on the plan – they wanted to mix the lot sizes because it then becomes a total community with different uses. They have not shown any attached housing and if they have attached housing in the future, they would have to come back to the Planning Commission. He referred to the letter from Tri-ED (see e-mail attached to the Staff Report from Daniel E. Tobergte, President & CEO of Northern Kentucky Tri-ED), and stated that no one from Tri-ED has sold a lot for industrial development in this area. The completed the applicant's presentation.

Chairman Caddell asked if there was anyone else present who wished to speak in favor of this request. Mr. Light submitted for the record copies of letters (see Exhibit 1) received in favor of the request from Arthur & Roselle Green, Deane

and Elizabeth Poore, Daniel Childress and Shawn Murray. Mr. Costello stated that Staff will verify that their addresses are in Boone County. There being no one present who wished to speak in support of the request the Chairman asked if there was anyone present who wished to speak in opposition.

Mr. Wendell Brown, 12228 Percival Road, Walton, stated that the people who submitted the letters are the owners of the industrial property next door and they want to develop their property as residential too. He stated that Drees owns the property behind this property and they will develop that property too. He stated that this is a beautiful area. He stated that only forty acres of this property is in Boone County and Kenton County has declined this zone change. He stated that the applicant is proposing 4 – 8 houses per acre and there will be thousands of houses if you include the Drees property and the properties next door. This will not blend into the community. An example of “blending” is the Adams farm with five, ten, and twenty-acre-acre lots. He stated that he is a longtime resident, and the new neighbors did not move there to have a huge subdivision in the area. They want the rural atmosphere. They do not want crowded schools and roads. He stated that the back of this subdivision comes out onto Percival Road, which is a one-lane road with *Watch Out for Horses* signs and kids riding bicycles on it. He stated that there will have to be a large road built there. He stated that the industrial zoning retains the rural atmosphere and is preferable to this large amount of houses. He stated if these were going to be five-acre lots that blended into the community, they would not be here. He stated that the developer may decide to make all of the lots 50-foot frontages. He stated that it would be best to keep the area agricultural and let the subdivisions grow from where they are now. What is proposed is an unnecessary change of the atmosphere and way of life. He asked that the request be denied.

Ms. Sherry Carran, 927 Forest Avenue, West Covington, stated that she spoke at the Kenton County public hearing. She also spoke at the 2001 meeting in Kenton County when they were looking at this area to get an industrial base to bring in money for their budget. She told them that they need to consider agriculture as a way of bringing money into the county. She stated that agriculture is a land use that has a benefit. She stated that many people consider agricultural land as land waiting to be developed, but that not the case. She submitted a copy of a letter she submitted to Kenton County Fiscal Court in 2001 (see Exhibit 2). She reviewed the information she submitted to Kenton County and stated that we are losing our agricultural land. She stated that this is highly productive agricultural land. There are productive farms on the land to the west of this site in Kenton County. She stated that we need to find ways to save land that is still in agricultural production and benefiting the county. She reviewed the 1995 Kenton County Comprehensive Plan and the highlighted comments in her letter to Judge Murgatroyd and Commissioners (see Exhibit 2). She stated that she mentioned “Cost of Community Service” Studies (see Exhibit 2) to Kenton County Fiscal Court. She has served on the Kenton County Conservation District and has been involved with farmland issues. She is the Marketing Manager for the Northern

Kentucky Regional Farmers' Market in Covington. She stated that they received a grant from the Greater Cincinnati Foundation to do Cost of Community Services Studies and they have completed one in Butler County, Ohio (see Exhibit 2). She stated that these studies show that agricultural land brings in a fiscal surplus that counties need to balance their budgets. She stated that agriculture should be considered as a positive land use for Boone County. She stated that if the property is going to be changed, industrial would be a better change. She stated that light industrial has less impact on existing adjacent farmland and would be a more compatible land use. She stated that there was an article in the newspaper a couple of weeks ago that one in every five jobs in Kentucky is agriculture related. She stated that the Boone County farmers market is growing and there is a need for fresh locally grown produce. Ms. Carran reviewed and submitted *Why Smart Growth: A Primer* (see Exhibit 2).

Mr. Mark Petticord, 523 Walton-Nicholson Road, stated that his property adjoins the subject property and is located in Kenton County. He did not receive a letter as an adjoining owner, but he got word of the meeting. He stated that he would not care to have an industrial park in his back yard, but the industrial traffic would be less than the traffic from a thousand houses. He stated that the City of Walton has a tight school system and it is hard to get in, even for the people living in the City of Walton. The schools are overcrowded and even with a new school going in he does not know how the schools would support all of these houses. He stated that Walton-Nicholson Road currently has septic systems and questioned the sewer system for the proposed houses. He stated that he would like the property to remain agricultural at one house per acre, rather than having four houses per acre. He has lived on his property for fifteen years and has 8.5 acres – it is nice country living and he does not want to see it go away.

Mr. Light submitted a letter received in opposition from Charles, Viola, Carolyn and Joan O'Donnell (see Exhibit 3).

Mrs. Kegley stated that the City of Walton has annexed property in Kenton County. She stated that she believes people living in Kenton County and paying taxes in Kenton County would go to school in Kenton County. She stated that some of the lines are in the middle of lots and questioned what that would mean in regard to the school system. Mr. Costello responded that the Walton-Verona School District has district boundaries and the boundaries go beyond the city limits. He noted the county line within some of the lots and stated that it is not just an issue of the School District, but also the Fire District. He stated that there has been some discussion of realigning the lots so that they are either in Kenton County or in Boone County. He stated that the lots in Boone County would be served by Walton-Verona School District.

Mr. Berling stated that the Walton-Verona School District had some concerns about this development and they met with the School District two or three times after they wrote the letter (see letter dated June 28, 2005 from Bill Boyle,

Superintendent, Walton-Verona Independent Schools which is attached to the Staff Report). Mr. Berling stated that they will make every effort to have the property lines coincide with the county line which will avoid the property owners have two tax bills. He stated that Walton-Verona School District boundaries go to the county line regardless of the city limits and the children in this development will go to two different school districts. He stated that they did longer cul-de-sacs in Wildcat Run to get bus service and they are doing a 90-foot cul-de-sac rather than the normal 60-foot cul-de-sac in this development. He stated that one of the attractions of Walton is the Walton-Verona School District and they will work with the school district.

Mr. McMillian questioned why the lots are so much smaller in Boone County than in Kenton County. Mr. Berling responded that they have changed that.

In response to a question from Mrs. Poston, Mr. Berling stated that the development will be on city sewers or it will not happen. He stated that there will be a central system and there will be treatment. He stated that there will not be septic systems, there will not be individual units – it will be a central sewer system.

Mr. Berling stated that the lots sizes were done without thought of county line – they were working with the topography. He stated that this was mentioned by the School District and the lots are now more evening distributed – which they will show when they come back with the plan. Mr. McMillian asked if the lots in Boone County are a lot bigger. Mr. Berling responded “yes” and stated that they estimate there will not be more than three houses to the acre. He stated that they have no frontage on Percival Road, but they have shown a road worthy of being called a north/south connector road and they will probably tie into Percival Road at some point. He stated that they met with Bill Boyle (Superintendent, Walton-Verona Independent Schools) and he was happy with the revisions. They will meet with Bill Boyle again. Chairman Caddell stated that the Planning Commission has not received any follow-up letters from Walton-Verona School District.

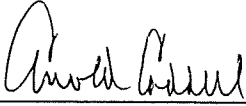
Mr. McMillian questioned why there are no recreation areas for that many houses. Mr. Berling responded that there is open space and there are community facilities with a shelter and a pool. Mr. Light indicated the open space on the Power Point slide.

Mr. Carmichael asked if the applicant wants to amend the request from SR-2 to SR-1 since the applicant indicated that there will be three houses per acre. Mr. Berling responded “no” and stated that SR-1 would not allow less than 65-foot lots, but with SR-2 they can have 50-foot lots and 100-foot lots and have the flexibility to do a mix. Mr. Carmichael asked if they would be willing to accept three houses per acre as a condition of the zone change. Mr. Berling responded “yes”.

Mr. Wendell Brown stated that the Walton-Verona School District is great because it is small – but with this development and so many more houses, it will just be another school district.

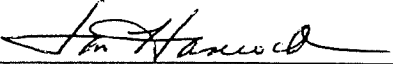
There being no further comments, the Chairman stated that the Committee Meeting for this item will be on August 24, 2005 at 5:00 PM. This item will be on the Agenda for the Business Meeting on September 7, 2005 at 7:00 PM. The Chairman closed this Public Hearing.

APPROVED:



Arnold Caddell, Chairman

Attest:



Jan Hancock, Recording Secretary

Exhibits –

1. Letters from Arthur & Roselle Green, Deane and Elizabeth Poore, Daniel Childress and Shawn Murray submitted by Staff
2. Submitted by Sherry Carran: (1) letter from Ms. Carran to Judge Murgatroyd and Commissioners dated March 20 2001, (2) letter from Ms. Carran to Kenton County Fiscal Court dated May 31, 2001, (3) copy of *Smart Growth America*, (4) *Cost of Community Services Study, Butler County, Ohio* – prepared by American Farmland Trust, December 2004, (5) *Farmers Market Growth*, and (6) *Why Smart Growth: A Primer* by International City/County Management Association
3. Letter from Charles, Viola, Carolyn and Joan O'Donnell submitted by Staff

ZONE CHANGE/CONCEPT PLAN COMMITTEE VOTE

TO: Boone County Planning Commission

FROM: Randy Barlow, Chairman

DATE: August 24, 2005


RE: Request of **James W. Berling (applicant)** for **Daniel Hance, Evelyn Hance, George Anderson, and Sara Anderson (owners)** for a Zoning Map Amendment from Agricultural Estate (A-2) to Suburban Residential Two (SR-2) for a 48 acre area located at 247, 273, and 293 Walton-Nicholson Road, Walton, Kentucky. The request is for a zone change to allow the Boone County portion of a subdivision, for single family residences, that will be located in both Boone and Kenton counties.

REMARKS:

We, the Committee Members were present at the Committee Meeting and voted on the above request or else were absent from voting. Further, based upon the vote, the Committee directs the Staff to draft the findings of fact and conditions if deemed necessary in order to complete the Committee Report.

Berling/Hance/Anderson

August 24, 2005

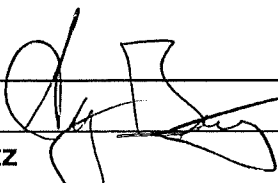


Randy Barlow

For Project Absent
 Against Project
 Abstain Deferred

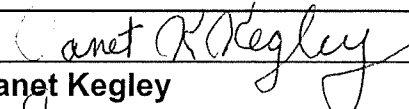
Kim Bunger

For Project Absent
 Against Project
 Abstain Deferred



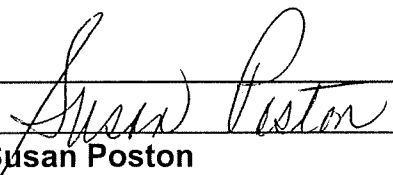
Greg Breetz

For Project Absent
 Against Project
 Abstain Deferred



Janet Kegley

For Project Absent
 Against Project
 Abstain Deferred



Susan Poston

For Project Absent
 Against Project
 Abstain Deferred

Charlie Reynolds (Alternate)

For Project Absent
 Against Project
 Abstain Deferred

Earl White (Alternate)

For Project Absent
 Against Project
 Abstain Deferred

Lisa Wilson (Alternate)

For Project Absent
 Against Project
 Abstain Deferred

TOTAL: DEFERRED 2 FOR PROJECT 1 ABSENT
2 AGAINST PROJECT ABSTAIN

SUPPORTING INFORMATION



JAMES W. BERLING ENGINEERING, PLLC

Land Surveying • Site Development • Civil Engineering Services • Land Planning

KY License No. 5745

1671 PARK ROAD, SUITE ONE • FT. WRIGHT, KENTUCKY 41011 • (859) 331-9191 • FAX (859) 344-7422

Land Surveyor License KY 206

June 14, 2005

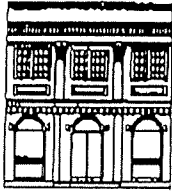
LEGAL DESCRIPTION

48 ACRES

Beginning at a point in the south right of way line of Walton-Nicholson Pike, said point being the northwest corner of the property of the Hance Family Trust (Deed Book 438, Page 122); thence in an easterly direction along the south right of way line of Walton-Nicholson Pike a distance of 1,150.00 feet to the Kenton Count-Boone County line; thence in a southerly direction along the Kenton-Boone County line, 3,070.00 feet more or less to an angle point in said line; thence continuing along the county line in a southwesterly direction 230.00 feet more or less to a point in the southwest line of said Hance Family Trust property; thence in a northwesterly direction along the southwest line of the Hance Family Trust property 1,485.00 feet more or less to a corner; thence in a northerly direction along the west line of the Hance Family Trust property 1,335.00 feet more or less to the place of beginning.

Containing 48 Acres

BOONE COUNTY PLANNING COMMISSION



2995 Washington Street • Burlington, KY 41005

www.boonecountyky.org

Phone: (859) 334-2196

Fax: (859) 334-2264

E-mail: plancom@boonecountyky.org

August 30, 2005

James W. Berling
1671 Park Road
Suite One
Ft. Wright, KY 41011

RE: The request of James W. Berling (applicant) for Daniel Hance, Evelyn Hance, George Anderson, and Sara Anderson (owners) for a Zoning Map Amendment from Rural Suburban (RS) and Agricultural Estate (A-2) to Suburban Residential Two (SR-2) for a 48 acre area located at 247, 273, and 293 Walton-Nicholson Road, Walton, Kentucky. The request is for a zone change to allow the Boone County portion of a subdivision, for single family residences, that will be located in both Boone and Kenton counties.

Dear Mr. Berling:

The following represents the conditions of approval for the above referenced application as recommended by the Planning Commission's Zone Change Committee at their August 24, 2005 meeting. If you, as the applicant, agree with these conditions, please indicate by providing the signatures of the property owners in the spaces provided at the end of this letter, and return the original letter to the Planning Commission office by Tuesday, September 6, 2005.

CONDITIONS

1. The applicant agrees that only single family detached housing will be constructed within the proposed development.
2. The applicant agrees that there will be no individual driveway access onto the main boulevard off Walton-Nicholson Road.
3. The applicant agrees that there will be no lots less than 60' wide.
4. The applicant agrees that sidewalks will be constructed within the proposed development per the *Boone County Subdivision Regulations*.
5. The applicant agrees that there will be no more than 40 zoning permits issued per calendar year for the proposed development.
6. The applicant agrees that the lots fronting Walton-Nicholson Road will have front yard setbacks consistent with neighboring homes along Walton-Nicholson Road.

Sincerely,

Mitchell A. Light
Assistant Zoning Admin/Enforcement Officer

MAL/pr

James W. Berling
August 30, 2005
Page 2

AGREEMENT

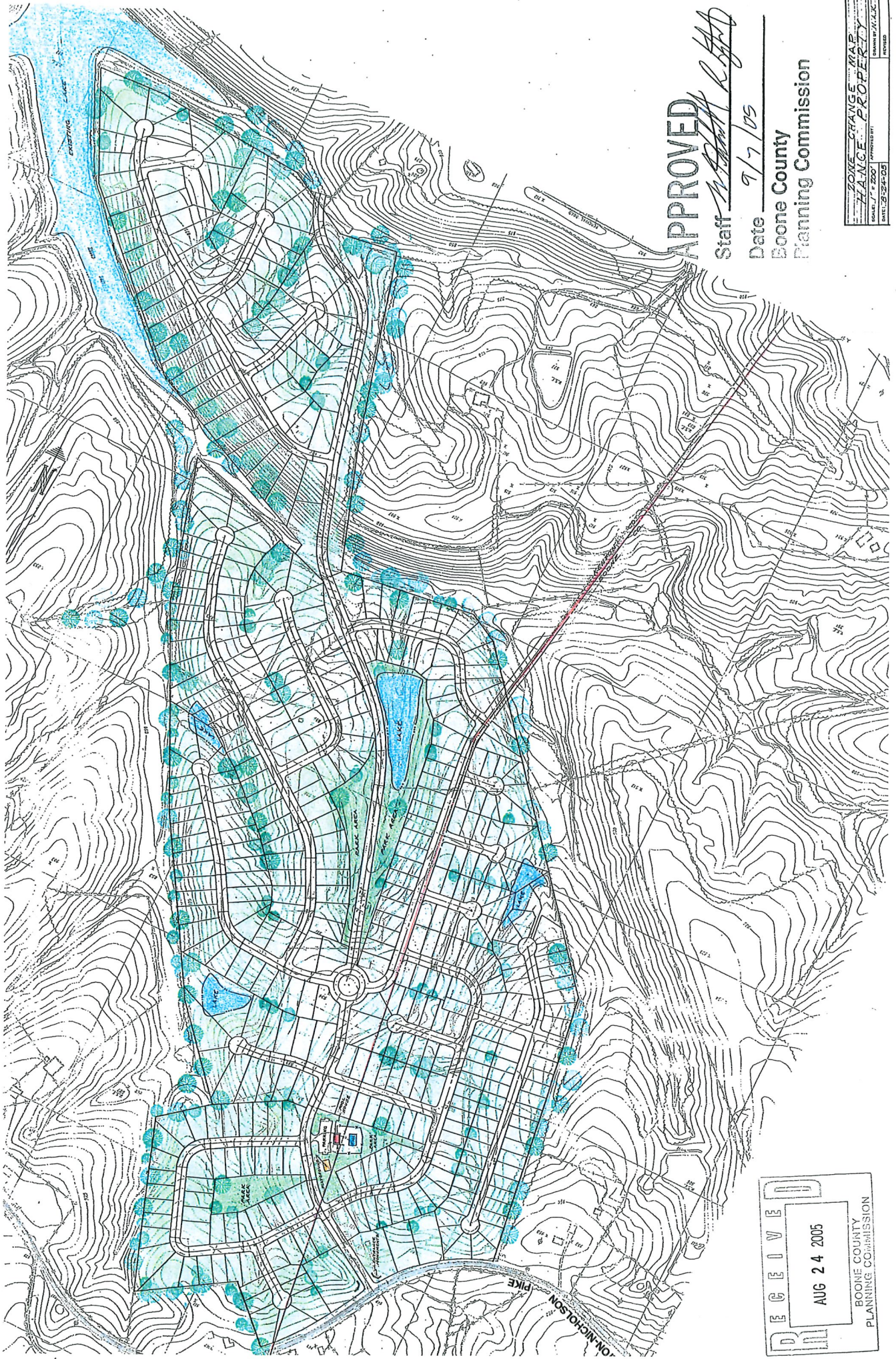
We, the Property Owners, do hereby agree to the recommended conditions of approval stated above for a Zoning Map Amendment from Rural Suburban (RS) and Agricultural Estate (A-2) to Suburban Residential Two (SR-2) for a 48 acre area located at 247, 273, and 293 Walton-Nicholson Road, Walton, Kentucky, to allow a subdivision for single family residences.

Daniel Hance 8/30/05
Daniel Hance (owner) Date

Evelyn Hance 8/30/05
Evelyn Hance (owner) Date

George Anderson 8-30-05
George Anderson (owner) Date

Sara Anderson 8/30/05
Sara Anderson (owner) Date



APPROVED
Staff *[Signature]*
Date 9/7/05
Boone County
Planning Commission

ZONE CHANGE MAP
HANGE PROPERTY
DRAWN BY: N.A.C.
SCALE: 1" = 200'
DATE: 05-23-05
REVISED

RECEIVED
AUG 24 2005
BOONE COUNTY
PLANNING COMMISSION

CITY OF WALTON, KENTUCKY
ORDINANCE NO. 2005- 13

AN ORDINANCE APPROVING AND ADOPTING A RESOLUTION OF THE BOONE COUNTY PLANNING COMMISSION RECOMMENDING APPROVAL FOR A REQUEST FOR A ZONING MAP AMENDMENT.

WHEREAS, the City of Walton, is a legislative body member of the Boone County Planning Commission, a joint county-wide planning unit or commission established under Chapter 100 of the Kentucky Revised Statutes; and,

WHEREAS, the Boone County Planning Commission received a request from James W. Berling (Applicant) on behalf of Daniel and Evelyn Hance and George and Sara Anderson (Owners) for a Zoning Map Amendment to the Boone County Zoning Map, and such Zoning Map Amendment being a zone change from Agricultural Estate (A-2) to Suburban Residential Two (SR-2) for a forty-eight (48) acre area located at 247, 273, and 293 Walton-Nicholson Road, Walton, Kentucky, in order to allow single family residences in the Boone County portion of a subdivision that will be located in both Boone and Kenton Counties; and,

WHEREAS, the Boone County Planning Commission, as the planning unit for the City of Walton, was requested to and has conducted a Public Hearing serving as a due process trial-type hearing and made findings recommending approval for the Zoning Map Amendment; and,

WHEREAS, the City of Walton, has received Resolution R-05-018-A of the Boone County Planning Commission recommending approval for this request; and,

WHEREAS, the City of Walton, deems it necessary to enact this Ordinance to preserve and protect the health, safety and convenience of the inhabitants of the City of Walton, pursuant to the City of Walton's legal authority, including but not limited to KRS Chapter 100;

NOW, THEREFORE, BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF WALTON, KENTUCKY, as follows:

SECTION ONE

The request for a Zoning Map Amendment is hereby approved. The Zoning Map Amendment is a zone change from Agricultural Estate (A-2) to Suburban Residential Two (SR-2) for a forty-eight (48) acre area located at 247, 273, and 293 Walton-Nicholson Road, Walton, Kentucky, in order to allow single family residences in the Boone County portion of a subdivision that will be located in both Boone and Kenton Counties. The real estate which is the subject of this request for a Zoning Map Amendment is more particularly described in Deed Books 234, 659, and 659, Page Nos. 142, 158, and 160, respectively, (as supplied by the Applicant) as recorded in the Boone County Clerk's records.

SECTION TWO

Resolution R-05-018-A of the Boone County Planning Commission, recommending approval of the Zoning Map Amendment, is hereby approved and adopted. The Resolution, along with the minutes and official records for this request, is attached hereto as Exhibit "A" and incorporated herein by reference.

SECTION THREE

This Ordinance and the Boone County Zoning Regulations, including the zoning map, adopted and approved, and their parts, sections, subsections, clauses, and provisions are hereby declared to be severable. If a Court having jurisdiction invalidates any part, section, subsection, clause, or provision of this Ordinance or the Boone County Planning and Zoning Regulations, including the Boone County Zoning Map, all other parts, sections, subsections, clauses, or provisions shall remain valid and effective, as they are severable.

SECTION FOUR

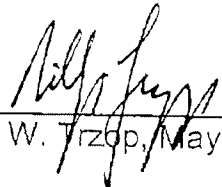
This Ordinance shall take effect and shall be in full force after its enactment and publication as required by law.

PASSED AND APPROVED on first reading by 5 Members of City Council on the 6TH day of October, 2005.

PASSED AND APPROVED on second reading by 6 Members of City Council on the 10TH day of October, 2005.

DATE OF PUBLICATION: October 20, 2005.

APPROVED:

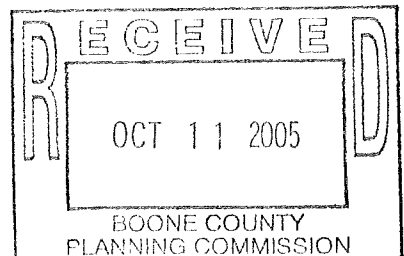


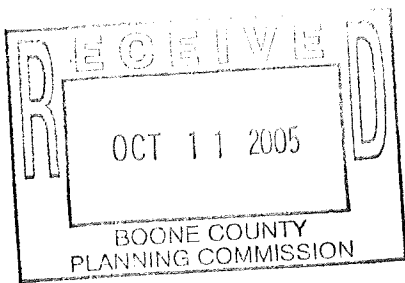
Phillip W. Trzop, Mayor

ATTEST:



Peggy Gray, City Clerk





City of Walton
P. O. Box 95
Walton, KY 41094

Phone number:
859-485-4383

Fax Number:
859-485-9710

Fax Transmittal Form

To: Kevin Costello

From: Peggy Gray, City Clerk

Phone number: 859-334-2196
Fax number: **859-334-2264**

Phone number: 859-485-4383
Fax number: 859-485-9710

Date: 10-11-05

Time: 11:00 AM

Pages: 3

- Urgent
- Please Reply
- For your Approval

- As Requested
- For Review and Comment
- Confidential

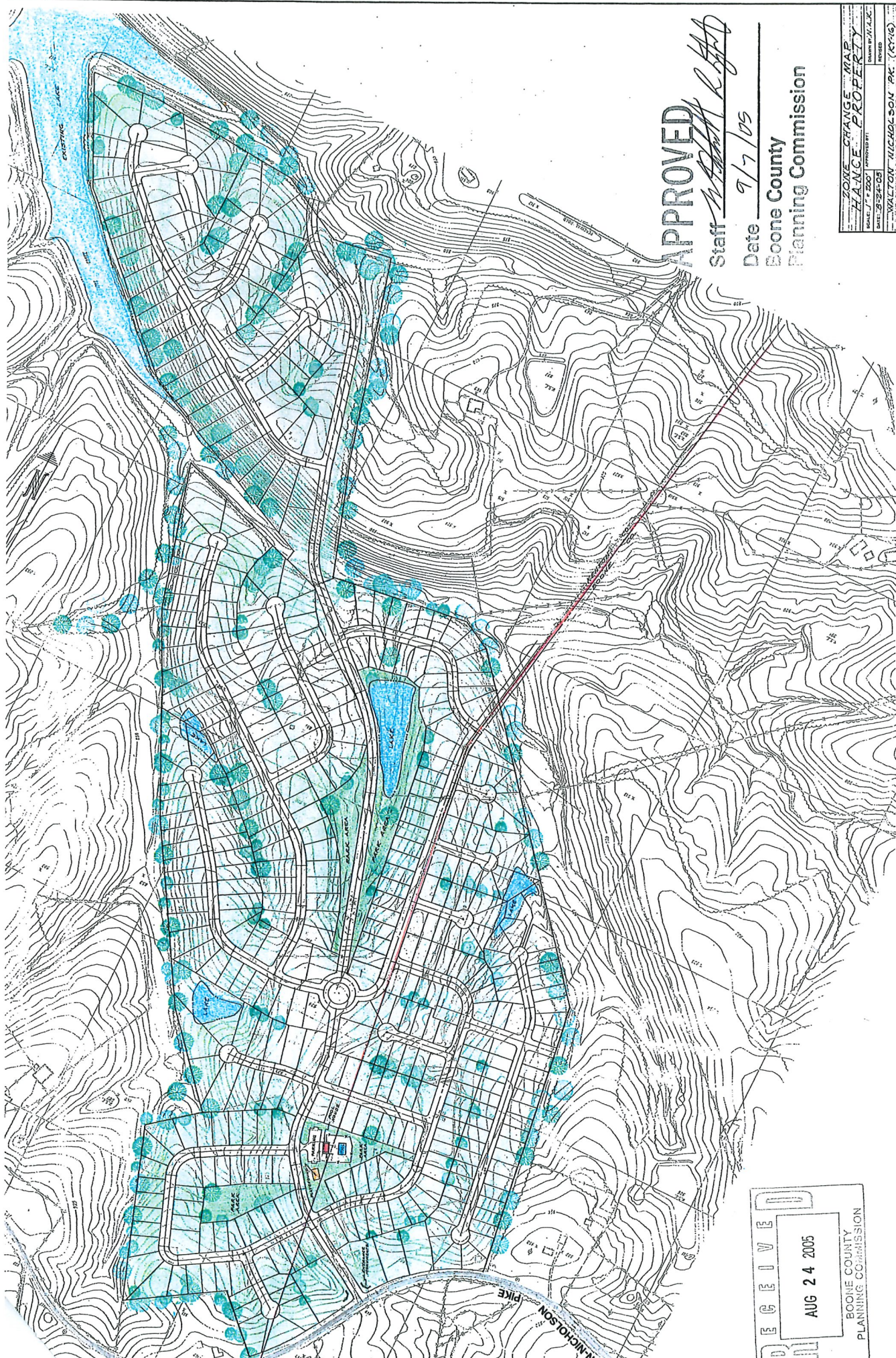
.....
Message:

Kevin,

I am faxing you a copy of The City of Walton Ordinance No. 2005-13; an Ordinance approving and adopting a Resolution of the Boone County Planning Commission recommending approval for a request for a zoning map amendment.

Thank you,

Peggy Gray
Peggy Gray



APPROVED

Staff *Robert R. [Signature]*

Date 9/7/05

Boone County
Planning Commission

ZONE CHANGE MAP	
CHANGE PROPERTY	
DATE: 7-22-05	PROJECT: [illegible]
BY: [illegible]	ISSUED BY: [illegible]
WALTON LUTON PIKE (CR-16)	
WALTON, MISSOURI, REFP002	

RECEIVED
AUG 24 2005
BOONE COUNTY
PLANNING COMMISSION