

**CITY OF BOULDER
PLANNING BOARD AGENDA ITEM**

MEETING DATE: August 21, 2008

AGENDA TITLE: Update on the process to address remodels and demolition/rebuilds that impact established neighborhoods (“Pops and Scrapes”).

REQUESTING DEPARTMENT:

Ruth McHeyser, Acting Planning Director
Susan Richstone, Long Range Planning Manager
Julie Johnston, Senior Planner

EXECUTIVE SUMMARY:

The purpose of this item is to provide the Planning Board with an update on the process to address single-family remodels and demolition/rebuilds that are impacting established neighborhoods. The project, formally referred to as “FARs” or “Pops and Scrapes” is now being called “Compatible Development in Single-Family Neighborhoods.”

In particular, the board can provide Winter and Company, the consultants hired for this project, with feedback on the project tasks and schedule. Finally, staff will be recommending that Council form a subcommittee of City Council and Planning Board members at their September 2, 2008 meeting.

BACKGROUND:

The firm of Winter and Company has been hired as the city’s consultant to address the impacts of new construction and additions in established single-family residential neighborhoods. The proposal, scope of work, draft schedule, and budget are included in *Attachment A*. Winter and Company has begun work on the project and the first public workshop will be held on September 10 at the West Senior Center.

City Council identified addressing this issue as a high priority at its January retreat. This issue was discussed at the joint Planning Board/ City Council Study Session on March 13, and at its March 18 meeting, City Council requested input from the Landmarks Board and the Planning Board on an interim ordinance. At its April 15 meeting City Council:

- Decided not to move forward with an interim ordinance;
- Requested that staff move forward expeditiously to develop an RFP for consultant services and select a consultant with the assistance of a subcommittee composed of two members each of City Council, Planning Board, and Landmarks Board; and

- Identified a problem statement, project objectives and public process objectives. (see Attachment B)

Following the April 15 City Council meeting, an RFP for consulting services was issued, four proposals were received, and three firms were short-listed and then interviewed by the subcommittee and staff on June 27. The Council Subcommittee met four times to provide input to the Request for Proposals (RFP), review proposals received, and select the consultant. The subcommittee has completed its work, which was to help draft the RFP and select the consultant. Winter and Company was selected, is under contract, and has begun work on the project.

QUESTIONS:

1. Does Planning Board have any questions or comments on the scope of work?
2. Does Planning Board have any questions or comments on staff's recommendation to form a subcommittee?

CONSULTANT TEAM AND SCOPE OF WORK:

The project team includes Winter and Company as the project lead with the following sub-consultants:

- Code Studio – assistance on code changes
- RRC Associates – conduct focus groups and assist in public outreach process
- Urban Advisors – overview of potential economic impacts

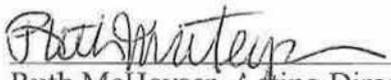
The project will include four steps (please see pages 23-27 of Attachment A for more information):

1. Frame the Question (*July – October*)
This step includes collecting data, reviewing the city's current regulations, modeling six to seven neighborhood contexts (existing character, existing regulations, alternative standards), refining the problem statement, and conducting a community survey. This step will include a community workshop, neighborhood workshops, interest group meetings, and a survey. The survey will glean feedback on alternative visual models that will be developed based on issues raised in the initial community workshop.
2. Develop a Strategy (*November – January*)
A strategy paper will be produced in this step that will outline alternative tools and provide preliminary suggestions for revisions to regulatory tools. This step will include a Peer Review Panel, preparation and presentation of an economics report, a community workshop, and smaller neighborhood workshops and/or interest group meetings as determined by feedback received in Step 1. This step will include Planning Board and City Council meetings for direction on the tools.
3. Produce the Tools (*February – March*)
During this step, the consultants will assist staff in developing the actual tools to implement the strategy. This will include drafting recommended ordinance language for adoption, a community workshop, and a focus group meeting.
4. Implementation (*April*)
This step will include adoption hearings.

PROCESS SUBCOMMITTEE:

Planning staff and the consultant are recommending that City Council appoint a new subcommittee composed of two members each of Planning Board and City Council to monitor and provide input on the public process as the project proceeds. The subcommittee would provide input on the agendas and materials for public meetings and also identify when additional process steps are needed or if additional City Council or Planning Board check-ins should be added. The subcommittee would not provide direction on substantive issues.

Approved By:



Ruth McHeyser, Acting Director
Planning & Development Services

ATTACHMENTS:

- A. Scope of Work
- B. Problem Definition, Goals and Objectives

Proposal for Single-Family Zoning District Regulations City of Boulder, Colorado

QUALIFICATIONS



Noré Winter conducting a community workshop.

Key Objective:

To revise the single-family zoning district regulations to address the impact of new construction and additions that are incompatible in scale and bulk with the character of the neighborhood.

Introduction

Boulder is recognized for its livability and high quality of life, much of which derives from the character of its neighborhoods. These have emerged over more than 125 years and are places where residents have invested, raised families and contributed to the civic vitality of the community. Many exhibit physical characteristics that have defined traditional neighborhoods of the city. These features have sustained over time, even when changes in the area have occurred.

The City Council has identified new construction and additions that are incompatible in scale and bulk with the character of established neighborhoods as an important issue. This determination builds upon decades of previous efforts and action to address the character of infill construction in and around the city's neighborhoods. In 2002, a focus group process helped clarify the issues and generate discussion on possible solutions. The results of this process, responses to the 2007 Community Survey and other previous projects and evaluations provide a solid starting point for this project.

Today, there is a sense that change now is happening which challenges neighborhood character and livability. While the term "pops and scrapes" has been used in an abbreviated manner to describe the discussion, we recognize that there are several issues that have brought the city to this point. Those issues include:

Accommodating Creative Design

The potential for new regulations to hinder creative designs is an issue.

Adjusting to Change

Some negative reactions may simply be in response to the pace of change that has been experienced recently. How change influences one's perception of compatibility, and how that feeling alters as a site matures, is an issue as well.

Increasing Density

Distinguishing increased building mass that is a part of increasing the number of living units on a site, versus increasing the floor area of a property is also an issue.



Loss of Traditional Buildings

Demolition of older buildings, some potentially with historic significance, erodes neighborhood character.

Mass and scale of buildings

Size, as seen from the street, and as perceived scale along side property lines are issues.

Open space

The percentage of lot coverage that is experienced as open space is said to be declining in some areas.

Pedestrian Orientation

Some new houses and landscape designs seek to isolate a property, rather than contribute to the pedestrian orientation of a neighborhood.

Solar Access

Larger buildings may constrain solar access. At the same time, the city's solar code may shape buildings in a manner that is inconsistent with design traditions.

To reach a practical solution, we must build upon previous efforts while also taking a fresh look at the issues. An inclusive process will be needed to define the compatibility threshold for new construction in a variety of neighborhood contexts. It will also be important to understand what can be built under current regulations.

With these starting issues in mind, we recognize that further analysis and discussion is needed to more precisely frame the problem and craft a response that is appropriate. That process is described later in this proposal document.

In preparing this proposal, we have reviewed the following materials:

- 2005 Boulder Valley Comprehensive Plan
- Boulder Community Survey, Dec. 2007
- "Pops and Scrapes Problem Definition, Goals and Objectives"
- Pop-Ups and Scrape-offs Summary of Results (Dec. 02)
- Staff memo and accompanying background information regarding the process to address impacts of remodels and demolition/rebuilds in established neighborhoods.

Proposal Contents:

	Page
Project Team Overview	3
National Trends in Neighborhood Character	5
Key Features of Our Approach	12
Scope of Work	19
Schedule	23
Budget	25
References	26
Office Resources	26
Appendices	27

Project Team Overview

Winter & Company is pleased to respond to the request for proposal to assist the City of Boulder in refining its Single-Family Zoning District Regulations. We offer a team of professionals skilled in developing neighborhood character strategies that are tailored to the community and that are structured for implementation and easy administration. Our experience includes projects in cities of similar scale across the country.

Winter & Company is a planning and urban design firm based in Boulder that consults nationwide to public agencies, neighborhood associations and private property owners. Many projects focus on maintaining community character and protecting livability.

Services include urban design plans, neighborhood conservation strategies, historic preservation programs and design guidelines. A special area of emphasis is in balancing development regulations as established in underlying zoning codes with more discretionary design review guidelines. Projects span more than 150 communities in 48 states and Canada.

Noré Winter, principal and owner of Winter & Company, is a planner and urban designer with more than thirty years of experience consulting nationwide. He is frequently a featured speaker at conferences and conventions, including the National Trust for Historic Preservation, the Western Planners Association, the American Planning Association and statewide preservation organizations. He is former Chair of the National Alliance of Preservation Commissions. He will be Principal-in-Charge.

Other Winter & Company team members include:

Julie Husband - Director of Planning & Urban Design Studio

Abe Barge - Senior Planner, and Project Representative

Mary Phillips - Associate Planner & Designer

Bodh Saraswat - Junior Planner & Designer

We are joined by:

Code Studio - Code Writing Strategies

Based in Austin, Texas, Code Studio focuses on high quality place-making strategies--moving plans from concept to implementation. They specialize in crafting zoning codes that are easily understood and accessible. In the past ten years the owners have been involved in planning and code initiatives in over 40 communities nationwide. They are collaborating with Winter & Company on several community character projects across the country, including the Denver code update, and mass and scale projects in Alamo Heights, TX; Terrell Hills, TX; West Palm Beach, FL; Atlantic Beach, FL; Sun Valley, ID; and Galveston, TX.

"Winter & Company is one of the top firms in the country who do this type of work. Their technical expertise is exemplary.

Winter & Company grasped the challenge of designing solutions for diverse neighborhoods, came up with the concepts, did the analyses, handled the public meetings, and designed an effective solution to our neighborhoods' design challenges.

They did a great job with their computer modeling of showing our neighborhoods' existing character, the implications of building under our current zoning, displaying various alternatives for each neighborhood, preparing the results of neighborhood surveys, and showing how zoning changes would affect the neighborhoods.

We have used Winter & Company here in Durango since 1981 and they have always delivered award-winning products on the various contracts we have employed them on."

Greg Hoch, Planning Director, Durango, CO

"We continue to use the master guidelines you wrote for Atlanta as the basis for all neighborhood-specific standards. They provide an excellent framework for preservation in our historic and conservation districts."

*Atlanta Urban
Design Commission*

RRC Associates - Public Outreach & Strategies

Also located in Boulder, Colorado, RRC works with local governments, public agencies and private developers and corporations, offering services in research, feasibility planning and design. The staff includes professionals with extensive experience and qualifications in addressing the problems and needs of communities. They have worked in a variety of communities and seek solutions to problems which are tailored to local conditions and needs. RRC conducted a preliminary analysis of mass and scale issues for Boulder in 2002, which include focus groups and a survey. Materials from that assignment will be available for review in this project.

They will help to design the public outreach process and conduct a series of focus group meetings. They also will assist in larger community meetings in generating workshop oriented surveys that seek to answer the broader questions regarding neighborhood character.

They worked with Winter & Company in planning assignments in Breckenridge and Telluride.

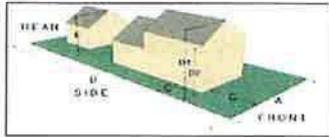
Urban Advisors - Economics

With offices in Portland, Oregon and Washington, DC, Urban Advisors creates strategies for community development based upon the market and economic factors. They will provide an economic overview of potential impacts for zoning changes. They assisted Winter & Company on similar projects in Walla Walla, Washington, Truckee, California, Canton, Ohio and Helotes, Texas, as well as a mass and scale project for Lexington, Kentucky.

(More details of individual firm qualifications are presented in the Appendix to this proposal.)

PROJECT UNDERSTANDING

National Trends in Neighborhood Character



Durango Ridge Offset: A new context-based zoning designation in Durango establishes a maximum length for wall and roof planes. This divides the overall mass into "modules" that reflect traditional building sizes.

Older established neighborhoods throughout America have been sleeping giants that have now awakened. To some it is a nightmare, to others an exciting opportunity.

Perhaps as much as a decade ago, residents began to notice that something was happening to the character of these places that they called home. After many years of apparent stability, change was occurring. Original cottages and bungalows were torn down, and were replaced with larger structures that were out of scale.

Alarms went off. At first, neighborhood associations responded by trying to get historic districts established. This designation provided a detailed set of design guidelines and a process of review that could consider mass and scale as well as architectural character. In some cases, the city also offered an alternative "conservation district," which focused more on block character and less on preservation of the details of individual buildings.

While these are useful tools, they were not practical for all situations. These systems require substantial manpower to administer, both in terms of staff and volunteer commissions. In addition, applying the historic district approach sometimes goes beyond the neighborhood's goals and the city's intentions.

Even when these systems are in place, there is a lingering conflict with underlying zoning provisions. For example, while the traditional height of buildings in a neighborhood may be one story and design guidelines call for compatibility, the base zoning often permits a

Durango Height Elevation New standards for established neighborhoods in Durango limit wall height at the side yard setback line as well as the overall maximum.



While many people seek to tame this trend, there are two sides to the question. Even though "neighborhood protection" is a strong motivator, some planners argue that cities should go through cycles of investment, which keeps them vibrant and healthy. The influx of new owners helps support community schools and services, improves property values and can enhance the efficiency of public transit.

One resident has described it as viewing building from the "two sides of a fence" that runs along a property line. If you are the owner of the property, the ability to expand or to sell and realize a profit is important. If you are the adjoining neighbor experiencing a massive new building, and a loss of sun and privacy, your perspective may be different. Both viewpoints must be acknowledged if a viable answer is to be found.

What can be done?

These are some steps that communities are taking:

Adjust the underlying zoning

A key step is to fine-tune the basic prescriptive standards in the zoning ordinance to be more context-sensitive. Some basic calibrations are:

Adjust the maximum building height.

In some cases, reducing the overall height limit may be needed; in other cases, reducing the height along sensitive edges may be more important.

Define different height limits based on the position on a lot.

Setting a lower wall height limit at the minimum sideyard setback line, for example, can help reduce impacts on neighbors, without necessarily limiting overall building height. Different systems may limit the front wall height, or that along side lot lines. Some address the rear lot.

Set a limit on wall length.

For example, establish a maximum front wall plane length that reflects the traditional width of buildings along the street. While the overall width of a new building may be permitted to be greater, the front portion will appear to be in scale with the context.

Establish a floor area ratio.

This sets a relationship of the maximum building area to the size of the lot, with the idea that these should be in proportion.

Revise building set-back provision.

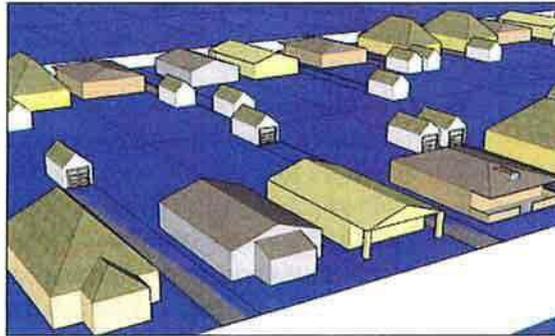
In some cases, existing codes may prevent one from constructing a new house in line with neighboring structures, because the front yard setback minimum is greater than the traditional pattern.

"In its community design planning, the city will support and strengthen its residential neighborhoods. The city will seek appropriate building and compatible character of new development or redevelopment, desired public facilities and mixed commercial uses, and sensitively designed and sized rights-of-way."

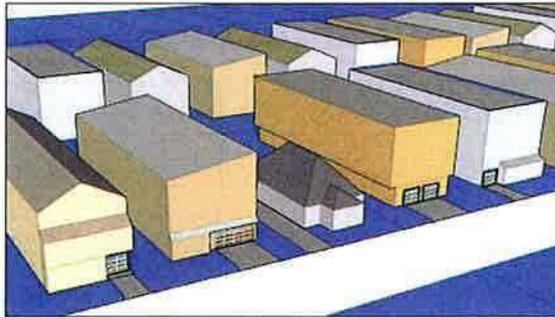
Excerpt from the 2005
Boulder Valley Comp
Plan

Describe the existing context in objective terms

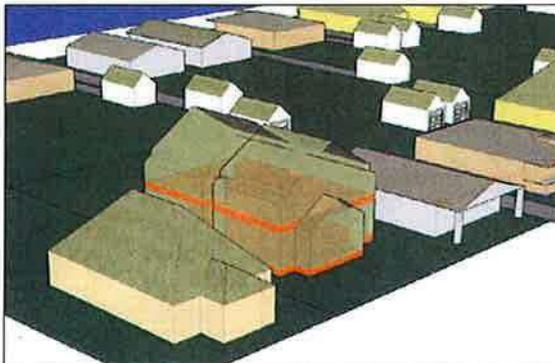
In order to develop standards that are more context-sensitive, the existing character must be documented. This may include descriptions of basic framework features, such as the configuration of blocks, streets and alleys, as well as specific patterns of building arrangement, setbacks, mass and scale. Looking for patterns of consistency is a key part of this analysis, but defining the range of diversity is important as well. This may help to identify the range of "tolerance" that exists for accommodating change. It is also important to match this analysis of context with other community planning goals related to livability, growth and economic health.



*Existing Context
Computer models show the established neighborhood context. This served as a base for testing alternative regulations.*



*Existing Regulations
The computer models show the potential cumulative impact of new building that could reach the maximum potential building envelope. One earlier traditional house remains in the image for comparison.*



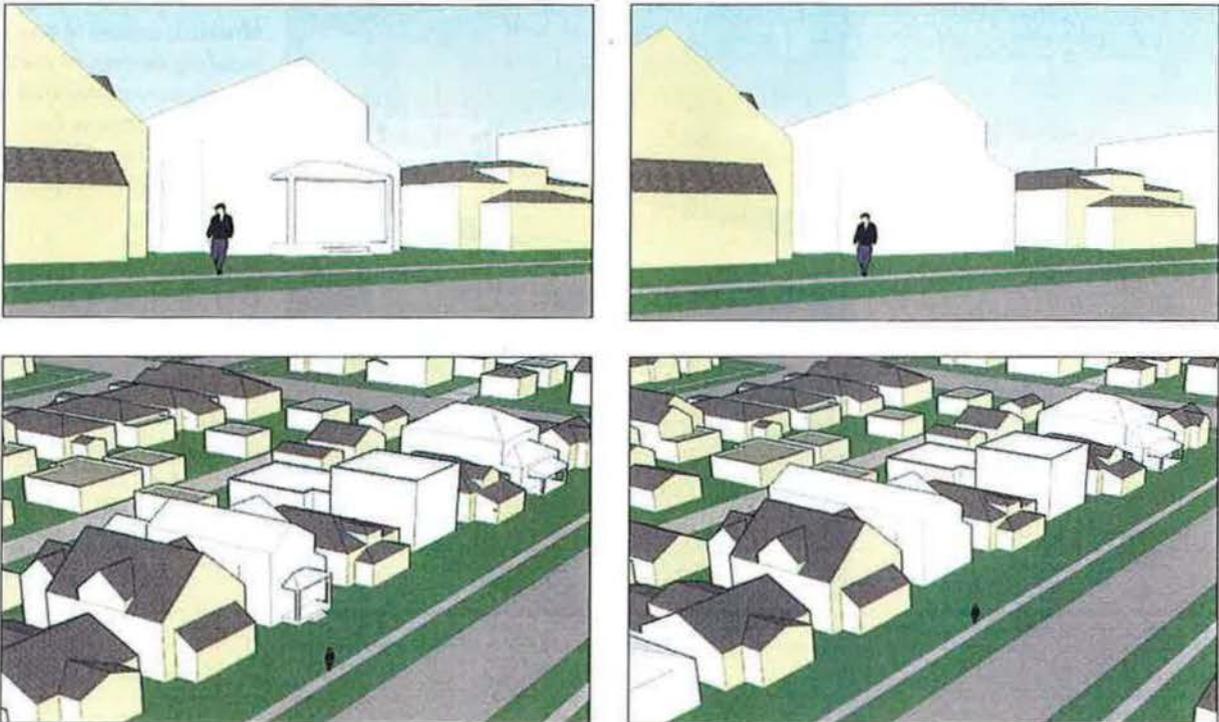
*Proposed Regulations
A computer model illustrates the potential character of a new infill building designed to meet proposed standards.*

Illustrate the potential effects of revised standards

The numbers placed into a code can yield unexpected results. The best way to predict the potential outcome and test to see that the changes will yield a compatible solution is to generate three-dimensional representations, or "models," of alternative standards. This helps the community shape policy in an informed manner. Computer imagery is particularly easy to apply to this task today.

Provide options for discretionary review

Changes to existing zoning standards should address many issues, and keep the system simple to administer, but in some situations a more discretionary approach may be needed. When an owner seeks to execute a design that doesn't quite fit the mold but could still be compatible, they may wish to have an option for using alternative standards, or even enter into a design review process using guidelines. In other cases, the city may wish to modify a regulation to respond to an unusual site condition, such as where lots exist that are smaller than the permitted minimum. These "alternative compliance" methods can provide flexibility in a system that otherwise is prescriptive. They should be designed, however, to be used only as needed, such that the overall system is efficient, fair and predictable. This may be built into the basic zoning as an alternative track, or it may be enabled through an overlay, the way historic district designation typically is.



Basic Standards

We see how different mass and scale standards addressing one-story elements affect a neighborhood. Top left, a house with a porch, and bottom left, in context. Top right, a house without porch, and bottom right, in context.

Project Goal and Objectives:

"To protect the character of established single family neighborhoods by assuring that new construction and additions are compatible in scale and bulk with the character of the neighborhood.

1. It is very important to retain flexibility for people to alter their homes as their needs change...It is important to provide for appropriate change over time.
2. Ensure that solutions promote variety as opposed to monotony.
3. Ensure that all neighborhoods or certain lots with characteristics different from one another are treated fairly and equitably.
4. Include an efficient process to address unintended consequences (an appeal or variance process).
5. Include analysis of broad economic impacts."

Where is this going?

With current trends, we will see planning tools becoming more context sensitive, responding to traditional development patterns. At the same time, residents will also recognize that neighborhoods are not frozen, and that change can be sculpted to respect context and even can be beneficial. These refinements will come with extensive debate, and it is important to provide a forum for reasoned discussion in which all viewpoints can be heard. The stakes are high. The character of our neighborhoods and the success of our cities will be greatly influenced by this movement. It is important that we all work to craft creative solutions that will enhance livability in all of its aspects and maintain the character that we value.

How do these trends relate to Boulder?

Boulder is experiencing these same mass and scale issues. Part of the problem is that the Boulder's neighborhoods each have distinctive characteristics, and yet the current standards may not effectively convey these differences.

In many cases, a project may be approved, and then residents are later surprised by unexpected results that are inconsistent with the setting. Fundamentally, these districts are now threatened by their own success: People wish to invest here, and increase housing supply. That is good news. But, these new buildings can threaten to alter the character of these neighborhoods.

At the same time, there are genuine considerations for those who seek to make improvements, and to assure that investment flows into these areas in a positive way. The challenge is to find the appropriate balance of interests and then tailor tools to meet shared objectives.

At this point, we understand these needs:

1. The key characteristics of each of the city's neighborhoods need to be articulated.

This will help everyone involved consider context more effectively when considering infill design concepts. This includes descriptions of traditional lot coverage ratios, building heights and massing.

2. The force of the underlying zoning regulations should be described.

The base zoning sets expectations for single-family residential mass and scale that should be illustrated such that people understand the difference between the "by right" condition and the goals for community character.

3. A strategy needs to be adopted that explains how zoning standards and other potential tools can be combined to address the issues.

This strategy should illustrate, through computer models, the potential results of new regulations upon single-family residential buildings.

4. Following these steps, specific tools should be crafted to address the issues.

We assume that this will include amendments to single-family residential zoning standards.

5. The process must actively involve the community.

A series of interviews, focus groups and public workshops will be needed to assure that those with interests in the historic districts have an opportunity to provide their insights. Workshops must be planned to be interesting, informative and productive.

These needs are addressed in the discussion of our approach, which follows in the next section of this proposal.

"Projects should become a coherent part of the neighborhood in which they are placed. They should be preserved and enhanced where the surroundings have a distinctive character."

*Excerpt from the 2005
Boulder Valley Comp
Plan*



"Projects should incorporate well designed functional open spaces with quality landscaping, access to sunlight and places to sit comfortably."

*Excerpt from the 2005
Boulder Valley Comp
Plan*



Key Features of Our Approach

A Four-Step Process

The project will be conducted in four basic steps. The first two steps constitute the bulk of the consultant work effort, with city staff providing support, in which the city's actions will be defined. The last two steps focus on executing the strategy defined previously, with city staff leading and the consultant team providing support.

Step 1: Frame the Question

At the outset, we will strive to help the community more clearly describe the "problem." The intent is to reach agreement on this such that the subsequent efforts will be directed toward addressing it. This step therefore includes an analysis of existing codes, descriptions of the differing single-family residential neighborhood contexts that exist, a summary of current trends, and prioritization of issues related to them.

This effort includes a review of the studies and surveys developed by city staff, other consultants and municipal boards to build a starting point for this project. It also will include an initial public meeting, and a set of focus group discussions. It will culminate with a working paper that frames the question and sets a direction for the next step. This will include summaries of existing conditions and trends as well as an outline of some potential responses.

Step 2: Develop a Strategy

In the second step, we will produce a strategy paper that defines the way in which the city should respond to the question framed in Step 1. It will include recommendations for revisions to regulatory tools, and may introduce new ones as well. Revisions to basic development standards are anticipated. Where they are relevant, specific numeric code recommendations will be provided.

This will be a technical document that will propose standards potentially including: height, lot coverage, LVR, FAR and solar standards. It will also consider basic urban design and conservation principles. Illustrations will be used extensively.

The strategy paper will also address how the tools are to be implemented. Some may apply city-wide to all properties in a zoning class. Others may apply to parcels of specific sizes, or those within specially designated areas. This element will also consider the administrative requirements to implement the strategy. Minimizing staff and board work loads, and expediting review and decision-making are key objectives.

This phase will also include an energetic public outreach component, with public workshops and focus groups. A visual survey also will be developed, which will provide an opportunity for residents and property owners to express opinions on alternative development scenarios.



As an additional service, we will assemble a panel of planning and design professionals from other communities that have implemented, or are developing, similar types of community character systems.

We will also produce a white paper in this phase. It will discuss the broader issues of economic impacts and design regulations that address house size. It will look at several communities where regulations have been adopted that limit house size and the overall impact on the market since the regulations have been adopted. This will take into account the current housing market trends. We anticipate two presentations of this material, one with the community and one with the City Council.

Step 3: Produce the tools

In the third step of the project, the regulatory tools will be developed. At this point, staff will take a greater role, and the consultants will provide assistance. While developing the regulations, we will strive to make them user-friendly as well.

Step 4: Implement the Tools

The implementation step focuses on public hearings requisite for adoption, and also includes assistance in putting the new regulations into action. A special training session, for example, is included. This will be designed for staff and boards to practice using the new regulations such that the first real projects to enter the system will be handled in an optimum manner. Staff will also take the lead in this phase, with the consultants providing assistance. We will attend selected hearings and direct the training.

Tailoring to Boulder

The most effective actions to address mass and scale will be those that respond to the community. This means that social, political and economic factors in Boulder must help shape the outcome. Physical characteristics of individual neighborhoods are also important to consider. In our approach, we strive to tailor the recommendations to fit the distinct climate of the community.



"In order to achieve community goals and policies, the city will implement growth management tools that control the scale, location, type, intensity and timing of new development and redevelopment."

*Excerpt from
the 2005 Boulder
Valley Comp Plan*

Understanding Neighborhood Character

While there are city-wide values to consider, there are also different settings to acknowledge. Boulder's single-family residential neighborhoods exhibit a diversity of characteristics that give them their unique identities. The traditional scale of buildings found in one area, the manner in which they are situated on their lots, and the general density of development are basic features. The arrangement of streets in grids, or in curvilinear patterns are also defining features. Predominant landscape designs and parking arrangements are other variables. Finally the degree of similarity that exists, versus the degree of diversity that is found, may be a defining feature. In our approach, we work with the community to analyze neighborhood characteristics and describe them in an understandable way.

Evaluating Regulations

City regulations combine in a dynamic relationship that influences the way in which property improvements occur. Maximum potential building mass, for example is defined by a combination of height limits, setback requirements and ratios. Other regulations, including the solar ordinance and landscape standards further shape development. We will therefore begin with a study of what the current codes permit. This will build on the substantial documentation that the city has already assembled in the initial stages of this project.

Neighborhood character and zoning district boundaries

We know there are "character areas," which are parts of neighborhoods that share certain physical characteristics. These areas need closer study. That analysis may suggest some modifications to zone districts, or some refinements to existing regulations such that they are better keyed to contextual features.

Mass and scale in the zoning code

The fundamental tools that address mass and scale are those in the zoning code which set limits on building height, floor area and lot coverage. These vary by zone district, and in some cases by different lot sizes. But, to what extent do they also reflect differing design contexts? This needs analysis.

Sculpting building form

Beyond the basic massing standards found in the zoning ordinance, several finer-grained standards that seek to articulate single-family residential building forms to reduce their perceived scale may need to be developed. This is based on the assumption that, to some extent, a larger mass may be more compatible if it is "broken up" such that it appears smaller.

Design guidelines

More specific guidelines may be developed. While it is our understanding that the city does not envision establishing a city-wide residential design review process, there may be special, more limited applications. They could be tailored to selected neighborhoods with special circumstances, or they may be used in an "alternative track" initiated by the applicant, or simply used when considering variances. These and other approaches will be evaluated.

Visualizing the code

"Modeling" is a three-dimensional computer imaging tool that is projected in accurate scale, and will illustrate the potential effects of the existing code. While these effects may already be understood by many people, others in the community may not. It will be helpful to generate computer models of the existing code, such that average citizens understand what the current regulations produce. This set of illustrations can also be used as a starting point to model and test any potential changes that might be considered. This modeling will build on the analysis and photo essay work that the city has already produced. It is a component of our approach.

Balancing Variables

This project requires balancing several key variables in order to best fit the community. These are some key "balancing acts" that we anticipate:

Simplicity versus complexity

The outcome should be simple to understand and administer. A limited set of specific standards that address mass and scale, for example may be the easiest for property owners to understand and for staff to interpret at the permit counter. On the other hand, if the system is over-simplified, it may not sufficiently respond to differing contexts that occur throughout the city, or offer flexibility for owners with special requirements or creative solutions. Finding a balance between a system that is a "one size fits all" versus one that considers each project on a case-by-case basis is an objective of our approach.

Property rights

The owner of a property has certain rights, in terms of their ability to make improvements. Owners of abutting properties also have expectations based on their understanding of rights. The neighborhood and the city as a whole also have certain rights to be considered. Therefore the differing viewpoints of being "inside the property line" and "outside the property line" must be acknowledged.

Public Process Objectives:

- 1. Provide the public with balanced and objective information to assist them in understanding the problem, alternatives and solutions.
- 2. Keep the public informed, listen to and acknowledge concerns, and provide feedback on how public input can influence final decisions.
- 3. Work with the potentially affected residents and other stakeholders to ensure that their concerns and issues are reflected in alternatives that are developed.
- 4. Work with the potentially affected residents and stakeholders to come up with potential solutions that council and Planning Board will consider.



Public participation is an important part of the process.

Property values

Similarly, there are different perspectives on the value of property that must be addressed. Value, in terms of potential sales price, is a key consideration. Part of this is derived from the features of an individual property, and of the size of the building that can be placed on it. The way in which the quality of a neighborhood contributes to “location” and therefore affects price is also a factor. Additionally, the quality of life that a neighborhood affords its residents is a component of property values to include in the discussions.

Public Outreach

An interactive dialogue with the community is, of course, essential. We will design a communication system that has these features:

1. It must be informed.

People need information that will help them make informed decisions. This includes:

- Summaries of research that is conducted
- Open discussions of issues and potential responses
- Testing the potential outcome of alternative responses

2. It must have broad participation.

We will help the city strive to maximize public participation, through a variety of outreach tools (described below).

3. Communication must be clear.

We will produce interim working papers that are concise, and well-illustrated. These will serve to:

- Explain options and alternative tools
- Group related issues to facilitate discussion
- Highlight key policy decision choices

Organizing the Communication System

A clear communication system will ensure that the project reflects community concerns. This includes conversations with community representatives at large, as well as smaller focus groups, individuals, city staff, boards and commissions. We will work with staff at the outset of the project to refine the communication plan. Public participation must be planned strategically and meetings must be organized to engage participants in meaningful activities.

We organize each meeting in advance and provide materials ahead of time for review so that meeting participants can arrive informed. We organize work sessions with the city staff, subcommittee, boards and the City Council. We also conduct interviews with select individuals, and stage focus groups, workshops and public meetings.

The communication effort will include schedules for:

- **Community Workshops**

These are designed to engage the greatest numbers of people and to highlight a diversity of ideas. We will conduct public workshops that engage participants in hands-on exercises that are exciting, interesting and consensus building.

- **Neighborhood Work Sessions**

We plan for a set of neighborhood grouped sessions. These may be organized by geographic quadrants of the city, or neighborhoods with similar characteristics may meet together.

- **Interest Groups**

These appeal to stakeholders who wish to participate in more specific discussions about matters of interest to them. In these sessions, special concerns are addressed and information related to specific issues is collected. Some representative groups are Neighborhood Associations, Plan Boulder, Realtors, Developers, Boulder Housing Partners and Historic Boulder.

- **Resource Group**

We will meet with Planning and Development Services Advisors Group that has been convened by the City. They will provide insights into specific building techniques that should be considered. They will provide advice about construction methods and standard dimensions that typically are used, such that the community can understand how potential regulatory changes may affect building.

- **Personal Interviews**

These meetings are used for key individuals whose advice is critical to the success of the project and who may not be able to attend group meetings. These will be scheduled as needed.

- **Peer Panel**

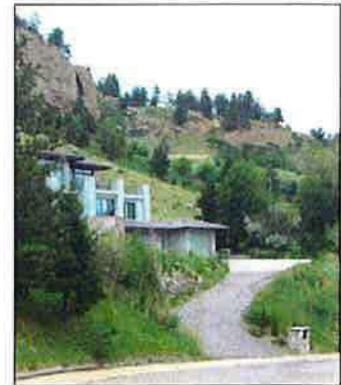
As a special service, we will assemble a panel of planning and design professionals from other communities that have implemented, or are developing, similar types of community character systems. The peer panel would meet in Boulder at a mid-point in the project, to review the Problem Statement and the draft Strategy. In a public presentation they would provide observations about their experiences and contribute advice to the Boulder project. Our initial recommendations are representatives from Denver, CO, Durango, CO and Palo Alto, CA, although other peer representatives may be identified in the initial stage of the project.

Team Conference Calls

We will schedule regular conference calls between our office, our consultant team members, and city staff to discuss general administrative matters as well as specific project content elements.

"Many thanks for your hard work and fine reports. All are greatly appreciated. We hope to use your services again!"

Eileen B. Segrest,
Executive Director,
Atlanta Preservation
Center



"The comments received from the workshop were very positive. Participants remarked on your knowledge and expertise in this subject area and the usefulness of the information that was provided."

Ginger Newman,
Convention Coordinator,
Wyoming Association
of Municipalities

Website

We will assist the city in establishing a web communication component for the project. We will provide content for posting on the city's website, and will assist city staff in creating interactive tools including surveys, as well.

Community Survey

We also will develop a Visual Survey, to be administered at an appropriate point in the project. This will include three-dimensional, computer-generated models of alternative regulatory options that would affect mass and scale. This will be designed to be administered in an efficient manner, potentially throughout the community.

Working as a Team with the City

This project requires a collaborative effort, with the consultants working with city staff and boards. We will include them in work sessions and strategy sessions throughout the process.

Process Subcommittee

The subcommittee's role is to monitor the process. It is not to review the content of project materials and recommendations. The subcommittee will act as a the sounding board to confirm "this is what we heard," from the community, planning and city council sessions. They will also identify if they believe more public process is in order, or if a city council or planning commission meeting should be added.

City staff

City staff bring in-depth experience with the issues related to the project. They will be key participants in the team in analysis strategy sessions and community workshops as well as implementation. There are also these administrative responsibilities:

- Appoint Planning Department project manager as noted in RFP.
- Provide background materials and data research as requested.
- Schedule meeting rooms for staff and community sessions.
- Provide consolidated comments on draft materials in a timely manner (as determined by schedule).
- Announce public meetings in appropriate publications.
- Announce posting of draft materials.
- Print workshop materials for community sessions.
- Distribute and tabulate survey
- Identify single-family residential areas where the study will apply within the RL-1, RL-2, RMX-1, RE and RR districts on a map. This will omit existing PUDs, homeowner association areas with covenants that address mass and scale issues, multifamily, duplexes and townhome lots/areas within these districts.

Scope of Work

Each of the components described in the project approach is presented here in a chronological description of services.

This study will address the following single-family residential districts: study will apply within the RL-1, RL-2, RMX-1, RE and RR districts. It will omit existing PUDs, homeowner association areas with covenants that address mass and scale issues, multifamily, duplexes and townhome lots/ areas within these districts.

Step 1.0 Define the Question & Develop Survey

In this step, we will help to summarize existing features of the neighborhoods related to single-family residential mass and scale, review the current regulatory system, characterize development trends and then summarize the "question" to address.

This step will also include a modeling analysis and community survey to inform the strategy.

1.1. Collect background materials and site visit

With staff assistance we will collect the following background materials to inform the project:

- GIS data
- Aerial maps
- Regulatory documents
- Staff study materials developed to date

1.2 Review system of regulations

The consultant will review the Zoning Ordinance and other existing regulatory tools including:

- Background materials
- Underlying zoning
- Neighborhood descriptions and goals statements, as may be found in surveys and neighborhood plans

1.3 Community Workshops, Modeling Analysis and Survey

The consultant will study residential building design issues in relationship to traditional building patterns, current regulations, and market trends in a modeling exercise. With staff we will establish the appropriate contexts to be modeled (six to seven neighborhood contexts are assumed; each context will include one-half of a typical city block). We will evaluate the analysis with the community.

This analysis will be undertaken in two parts. In the first part, we will present the established neighborhood models, current regulations and market trends in community workshop #1. We will collect public comment on the materials presented. We envision that this workshop will be able to be taken "on the road" for use in several smaller neighborhood work sessions where more detailed discussions can occur. These sessions will be undertaken primarily by city staff, with a member of the consultant team in attendance.

- Neighborhood Contexts
- Neighborhoods of similar character may be grouped in contexts. For example:
- 1. Early Traditional Grid
 - - Narrow width
 - - Alleys
- 2. Later Grid
 - - Wider lots
 - - No alleys
- 3. Compact Grid
 - - Newer developments
 - - Alleys
- 4. Curvilinear Streets A
 - - No alleys
 - - Flat top
 - - Wider width
- 5. Curvilinear Streets B
 - - No alleys
 - - Larger lots
 - - More topo
- 6. Base of Mountains
 - - Steep lots
 - - Special streets



In the second part, we will develop alternative models that address issues that may have been raised in the initial workshops. We will glean feedback on these models through a community survey. The survey will use a similar format to existing surveys we have used in the past, but tailored to Boulder. Within the visual survey we will present alternative models. The concept of the survey will be introduced at the end of the first public workshop.

It is assumed that the contexts that are studied will potentially apply to different zone districts. We understand from previous studies that we have undertaken that there will be lessons learned in one context that can be applied to another similar context in a different zone. This will be our approach in the Boulder project in order to address the building design issues regarding single-family residential development.

For each selected context we will:

- Model the traditional building scale; this information will be gathered from early maps and aerial images of Boulder
- Model what the existing system produces; we will model the cumulative effect of current regulations and citywide development trends

For the survey we will:

- Model alternative measures; we will model the effects of potential alternative standards.

Meetings

- Meetings with city staff (6 meetings - kick-off, review models, review workshop #1, debrief workshop #1, review survey and debrief survey).
- City Council Meeting to review project process (Project Representative will attend - determine make-up of subcommittee)
- Planning Board (Project Representative will attend - review process)
- Community Workshop #1 to define neighborhood character, review traditional models and trends, identify the building issues and introduce the survey (1 community workshop).
- Participate in additional neighborhood workshops. The format from the initial community workshops will be repeated in these sessions (4 smaller workshops).
- Conduct interest groups (4 meetings - resource group, other to be determined)
- Meet with subcommittee (2 meetings - kick-off, post workshop #1)

Deliverables

- Community Workshop Summary #1 (6-8 pages) for public distribution
- Visual survey on alternatives (12 pages)
- Powerpoint Presentations
- Workshop Materials (PDF format)
- Project Process Summary (PDF format)
- Problem Statement

Step 2.0 Develop a Strategy

In this step, we will develop a strategy for addressing single-family residential mass and scale within the RL-1, RL-2, RMX-1, RE, RR districts. It will outline the alternative tools and provide preliminary suggestions for specific standards that may then be refined for formal adoption.

In this step we will also include a Peer Review Panel (described on page 17) and a presentation of the economics report the evening before or after public workshop #2.

2.1 Produce strategy paper

A key question will be the extent to which mass and scale issues should be addressed in modifications to the underlying zoning. If so, how would this be implemented—as a blanket text change, as an overlay, or through some other mechanism?

2.2 Economics

The consultant will present the economics paper in a community workshop setting.

Meetings

- Meetings with city staff (4 meetings - review draft strategy, review final strategy, review workshop #2, debrief workshop #2).
- Community Workshop #2 to review the survey results, present strategy with preliminary standards and determine the appropriate tools (1 community workshop).
- Peer review panel and economics presentation (1 community workshop the day before or after workshop #2).
- City Council Session (1 meeting - to provide formal direction on tools)
- Planning Board (1 meeting - project update)
- Participate in additional smaller neighborhood workshops and/or interest groups as determined by feedback received in Step 1. If additional neighborhood workshops are undertaken the format and materials from community workshop #2 will be repeated in these sessions (6 meeting).
- Meet with subcommittee (1 meeting - post workshop #2)

"Thank you for drafting the Cannery Row Conservation District Design Program. Your expertise has been invaluable in bridging gaps between various groups and helping to identify a win-win solution...your professionalism and insights have been invaluable."

Fred Meurer,
City Manager
City of Monterey, CA





Deliverables

- Community Workshop Summary #2 (6-8 pages) for public distribution
- PPT presentations
- Workshop Materials (PDF format)
- Strategy Paper (PDF format (20 pages), outlining recommended actions)
 - Draft #1 (review with staff)
 - Final strategy paper (edited per staff comments)
- Economics Paper

Step 3.0 Develop the Tools

In this phase, we will assist city staff in developing the actual tools that will implement the action strategy. Revisions to current codes are expected to be a focus, and other tools, such as design guidelines and incentives may also be developed. We will prepare an initial draft of recommended ordinance language and will then assist city staff as they refine this for adoption. This also will include decisions about how the regulations will be applied. Some, for example, may be adopted for use throughout all relevant zone districts. Others may be tailored to specific lot conditions or geographic locations, perhaps as an overlay system.

Meetings

- Community Workshop #3 (assist city staff in presenting draft #1 of the design standards).
- Meetings with city staff (4 meetings - produce draft tools, review staffs refined draft, review workshop #3, debrief workshop #3).
- City Council Study Session (1 meeting - review tools)
- Conduct focus group (1 meeting - resource group)

Deliverables

- Outline of draft standards
- Outline of draft design guidelines (if appropriate)
- Preliminary draft of design standards
- PPT presentations
- Workshop Materials (PDF format)
- Memo describing recommended application of the standards

Step 4.0 Implementation

In this phase, the final tools will be put forth for adoption. We will assist city staff in this phase by attending one hearing as a part of the base services. Once the regulations are adopted, we will then conduct a training session with staff and relevant boards to refine their skills in applying the standards (as an additional service).

Meetings

- City Council hearing for adoption (2 - public hearing)
- Planning Board (1 - public hearing)

SCHEDULE

Task:

Authorization to Proceed

July 9, 2008

Step 1: Define the Question

Planning Board meeting	Aug. 21, 2008
City Council meeting (alt. to Aug. 19)	Sept. 2, 2008
Subcommittee meeting (kickoff)	Early Sept. 2008
Workshop #1: Define the Question	Sept. 10, 2008
Neighborhood Workshops	Sept. 15, 17, 23, 24, 2008?
Interest Group Meetings	Sept. 15 - 25, 2008?
Deliver Workshop #1 summary	Sept. 30, 2008
Deliver draft problem statement to staff	Sept. 30, 2008
Deliver survey materials to staff	Sept. 30, 2008
Review survey materials with staff	Oct. 3, 2008
Subcommittee meeting	Oct. 6, 2008 ?
Conduct Survey	Oct. 8-22, 2008
Staff submit tabulations	Oct. 27, 2008

Step 2: Develop a Strategy

Submit draft strategy	Nov. 12, 2008
Staff review	Nov. 18, 2008
Post strategy paper	Nov. 25, 2008
Subcommittee meeting	Nov. 25, 2008 ?
Workshop #2	Dec. 3, 2008
Neighborhood/Interest Group Meetings	Dec. 8-12, 2008
Subcommittee meeting	Dec. 15, 2008 ?
Joint Council-Planning Board Study Session	Jan. 13, 2009 ?
Planning Board Meeting (Direction on tools)	Late Jan., 2008 ?
City Council Meeting (Direction on tools)	Early Feb., 2008 ?

Step 3: Develop the Tools

Submit draft tools	Feb. 27, 2009 ?
Staff refines	March 10, 2009 ?
Workshop #3	March 25, 2009 ?

Step 4: Implementation

**April, 2009
TBD**

Additional Services

A. Additional Workshops, Focus Group Meetings and Public Hearings

Consultant team members are available to participate in additional meetings. The need for these may arise during the course of the project, especially in Steps 3 and 4.

B. Training Session

We offer a training session with staff and related boards as an additional service. The extent of this training will be influenced by the extent of the changes to codes that may occur.

C. Design Guidelines

If the need for more detailed guidelines arises for certain specific applications, in which they are custom tailored to different contexts, we can assist in producing these as well.

D. Additional Contexts

Seven context are to be modeled in the base contract. If additional context are identified that need to be modeled these will be an additional service.

E. Organize and conduct a Peer Review Panel

This would be staged near the end of Step 2, when draft strategies are ready for comment and evaluation.

BUDGET

Fees and expenses associated with each of the project steps are summarized below. See Appendix for detailed budget breakdowns.

Step 1	\$42,840
Step 2	\$39,785
Step 3	\$19,060
Step 4	<u>\$10,390</u>
Total Fees and Expenses	\$112,075

We understand that the city is eager to move forward on this project and to place revised regulations into action, and has an initial goal of completing the project by the end of the year. We will strive to execute the project in a timely manner, but anticipate, based on our experience with similar projects, that the timeline is substantially influenced by public input. Providing people sufficient time to review draft materials and respond to them in an informed manner will be important. With summer vacation schedules and end-of-the-year holidays, the timing of public work sessions may be extended longer than what is preferred.

Our schedule proposes completion of the first two of the four steps in the project by December. At that point, the direction would be clearly established, with the specific regulatory concepts defined. Although it is not likely that the project would be completed by then, everyone would have a clear understanding of the outcome, and from that point on, technical drafting of code language, and then the adoption hearings process would extend into early 2009.

We also have found that, upon acceptance of the strategy report that is due at the end of Step 2, there may be certain "quick actions" that can be enacted, while other details of the total strategy package are still in development. We will advise the city if there are such opportunities.

OFFICE RESOURCES

Winter & Company operates with a staff of fourteen in its Boulder, Colorado offices. Among the eleven professionals on staff, seven hold degrees in architecture and six hold degrees in planning and related fields.

An appropriate amount of staff time has been reserved for the professionals designated in the proposal to meet the project schedule and work load requirements. Details of staff hour allocations are provided in the detailed budget, which is included as an appendix.

The firm operates multi-platform computer systems. Reports are produced in desktop publishing format, using Adobe InDesign. Graphics are generated in AutoCad, Sketchup, Illustrator and Photoshop. Other graphics are generated by hand, where appropriate.

REFERENCES

City of Denver

Contact: Tina Axelrad
City Planner

201 West Colfax Avenue
Denver, Colorado 80202
720/865-2933

tina.axelrad@denvergov.org

*Zoning Code Update and Development Standards
For Established Neighborhoods*

City of Durango

Contact: Greg Hoch
Director of Planning

949 E. Second Avenue
Durango, Colorado 81301
970/375-4850

hochgs@ci.durango.co.us

Residential Design Standards

City of West Palm Beach

Contact: Friederike Mittner

City Historic Preservation Planner
Department of Planning and Zoning
200 2nd Street

West Palm Beach, Florida 33402
561/822-1435

fmittner@wpb.org

Building Mass and Scale in Historic Districts

Appendices

Budget

Firm Qualifications

- Winter & Company
- Code Studio
- Urban Advisors
- RRC

Please Return All
Listed Project Samples
to:
Winter & Company
1265 Yellow Pine Ave.
Boulder, CO 80304

Project Samples

A copy of each of these sample products is provided separate from the proposal document:

City of Alamo Heights, Texas: Report on Potential Changes to the Residential Development Standards

City of Atlantic Beach, Florida: Report on Potential Changes to the Residential Development Standards

City of Atlantic Beach, Florida: Design Guidelines for Traditional Neighborhoods

City of Boulder, CO: Design in the Flatirons Neighborhood

Boulder, CO: Pop-ups and Scrape-offs: Summary of Results, December 2002)

Chevy Chase Village, MD: Preliminary Report on Potential Changes to the Residential Development Standards

Denver, CO: Zoning Code Update Diagnostic Report

Denver, CO: Draft Building Form Approach for Areas of Stability

City of Durango, Colorado: Design Guidelines for Established Neighborhoods

City of Durango, Colorado: Report on Potential Changes to the Residential Development Standards

City of Durango, Colorado: Neighborhood Survey Results

City of Durango, Colorado: Public Workshop Summary #1

City of Durango, Colorado: Project Summary

City of Durango, Colorado: Ordinance No. O-2005-41

West Palm Beach, FL: Strategy Report for Residential Historic Districts

Problem Definition, Goals and Objectives

Problem Definition:

To address the impact on existing established neighborhoods of new construction and additions that are incompatible in scale and bulk with the character of the neighborhood. The impacts to be considered include without limitation: consideration of size, open space, massing and bulk planes, loss of space between houses, privacy, view sheds, lot coverage, blank walls, setbacks, height, and the streetscape and visual character. Additionally:

1. The biggest problem is scrapes that result in very large homes and mega spec homes that are out of scale with the existing neighborhood. The definition of what constitutes a "mega home" is related to both absolute size and relative size as compared to lot size and neighborhood context.
2. One aspect of the problem is that oversized homes are often built as speculative ventures, and the developer is trying to maximize profit by building the largest home possible. The high real estate values in our community drive the problem.
3. The loss of space between homes is important. It is important to maintain visual openness and a sense of space in neighborhoods and often new homes are built right to the setbacks at two stories, and open space on the lot, backyards, and privacy are lost.
4. The streetscape and visual character of the neighborhood are important.
5. The loss of mature trees, backyards, and sunlight affects neighborhood livability.
6. The loss of older homes represents loss of the community's heritage and culture.
7. The solar ordinance affects the shape of houses and is one aspect of the issue that needs to be evaluated.

Project Goal and Objectives:

To protect the character of established single-family neighborhoods by assuring that new construction and additions are compatible in scale and bulk with the character of the neighborhood.

1. It is very important to retain flexibility for people to alter their homes as their needs change, since many can't afford to move to another house. However, there is a threshold of pops over which these additions can be "too much." It is important to provide for appropriate change over time.
2. Ensure that solutions promote variety as opposed to monotony.
3. Ensure that all neighborhoods or certain lots with characteristics different from one another are treated fairly and equitably.
4. Include an efficient process to address unintended consequences (an appeal or variance process).
5. Include analysis of broad economic impacts.

Public Process Objectives:

1. Provide the public with balanced and objective information to assist them in understanding the problem, alternatives and solutions.
2. Keep the public informed, listen to and acknowledge concerns, and provide feedback on how public input can influence final decisions.

3. Work with the potentially affected residents and other stakeholders to ensure that their concerns and issues are reflected in alternatives that are developed.
4. Work with the potentially affected residents and stakeholders to come up with potential solutions that council and Planning Board will consider.