

Eco-Tourism and Conservation Initiative for S...

Callie Moore

Submission Date	Aug 5, 2024 9:57 AM
Name of Initiative	Eco-Tourism and Conservation Initiative for Southern Jackson County
Contact Person	Callie Moore
Title	MountainTrue Western Regional Director
Address	90 Tennessee St., Ste. D
City	Murphy
State	NC
Zip Code	28906
Primary Phone Number	828-361-0569
Email	callie@mountaintrue.org
Organization Type	Non-Profit
Organization Tax ID	56-1422691
Time of Year of Initiative	Off Peak (Dec - March) preferred

Describe the timing of the initiative in as much detail as possible (please list key project dates, milestones, timeframes, etc.)

The initiative involves engaging Equinox Environmental (“Equinox”) to assist with development of a Long-Term Conservation Plan for the southern portion of Jackson County over a 12-month period beginning in August 2024. The project includes distinct stages each with defined scopes and deliverables:

- Project goal setting, which includes identification of a local Steering Committee (~12) and a diverse Key Stakeholder group (24-36) that offers balanced representation from 6 Townships and various stakeholder perspectives including those of hospitality, recreation, eco-tourism, local businesses, agriculture, etc.
- An inventory of conservation, cultural and tourism resources, which will include data acquisition and an assessment of all current applicable code and ordinances;
- Resource analysis, which will include mapping and evaluation relative to comparable municipalities and governmental units, as well as analysis of relevant case studies including economic data;
- Client, key stakeholder and public engagement, which includes significant interaction (virtual as well as in person public meetings and public surveys, etc.) and analysis of key takeaways;
- Recommendations, which will include identified best practices, conservation priorities, and policy recommendations; and
- Conservation Plan document, including a draft document circulated for public input, followed by a final document incorporating and synthesizing all data and recommendations. This final work product will then be delivered to the Jackson County Commission for deliberation/adoption.

Describe your initiative

The initiative is to develop a Long-Term Conservation Plan for Jackson County’s District 4, which is six Townships: Caney Fork, Canada, River, Mountain, Hamburg, and Cashiers. The community need that will be addressed is preservation and expansion of high-value natural, cultural, and scenic resources, including eco-tourism opportunities.

In 2019 the Jackson Co. Commissioners adopted the Cashiers Small Area Plan. The Plan represents the vision of seasonal and year-round residents of the greater Cashiers community, both new and generational, as well as business owners. In February 2022, the Urban Land Institute (ULI) was hired to study the current development trends in the Cashiers region and make recommendations on how to best balance and manage growth while retaining a sense of place through design. Using the Small Area Plan as a guide, ULI developed a series of recommendations for the Cashiers region to retain its rural and small-town character.

The top recommendation in the ULI report, called “A Vision for Staying Rural by Design,” was to “create a long-term conservation plan for the Cashiers area that identifies critical natural areas, steep slopes, green spaces, and scenic views that should be permanently protected.” In response, work by a small group of citizens began to gain needed community and county support for the plan. In 2023 Commissioners recommended that the scope include all of District 4, which encompasses headwaters of three critical watersheds for Jackson Co (Tuckasegee, Chattooga, & Horsepasture).

Based on a study of sustainable travel practices, (Expedia Group Media Solutions, April 2022):

- 90% of consumers look for sustainable options when traveling, and
- 74% of consumers would choose a destination, lodging, or transportation option that is committed to supporting the local community and culture, even if it was more expensive. However, key takeaways were clarity and authenticity; that is, it must be easy to understand, and the location must be able to back it up with proof points and data.

In short, the overwhelming majority of travel consumers would be considered eco-tourists, in that a significant factor in the selection of where to spend their discretionary travel funds relates to a location’s demonstrated commitment to sustainable business practices.

Not surprisingly, these same factors are valued by potential residents as well as they evaluate locations to invest; in fact, Jackson County's in-migration from out-of-state, 5.1%, exceeds the North Carolina statewide average of 3.2%. (2022 American Community Survey 5-year Estimates).

Based on US Census data (2020) a significant portion of Jackson County's workforce is involved with professions that support the tourism and residential relocation industries:

- Entertainment, recreation, accommodations, and food service: 16.7%
- Construction: 6.6%
- Retail trade: 13.8%

Jackson County and surrounding areas also boast of some of the most biodiversity in the world:

- More than 400 rare plants exist here, 250 of which exist nowhere else in the world
- An incredible five rivers (Chattooga, Tuckasegee, Horsepasture, Thompson, and Whitewater) have their headwaters in southern Jackson County
- More species of salamanders than any other place in the world
- 174 species of butterflies
- More old-growth forest stands survive than in any other Southern Appalachian state
- Granitic domes of the region create the greatest extent of vertical cliff-face exposure in the east, as well as the highest cliffs

The data indicates that a significant portion of Jackson County's economy related to tourism and construction for both short-term visitors and in-migrating residents is linked to and due in part to the county's incredible natural resources. The resulting question is thus how to balance economic development with conservation in order to maintain both; said differently, how does Jackson County preserve the natural resource "goose" that is helping to delivering the eco-tourism "golden egg?"

These funds, in combination with others, will be used to engage Equinox Environmental to develop and refine – with public input – a District-Wide Conservation Plan specific to Jackson County's unique geography and stakeholders. The conservation plan is intended to complement our existing regulations and codes, while providing insightful recommendations, incentives and "best practices" that provide balance respecting the needs for both conservation objectives and economic development and growth. The plan would provide benefits to the existing community, enhance cultural vibrancy, and generate visits in off-peak seasons, as this is when a lot of hiking and fishing happens!

While conservation planning is a tool that's been in use for decades by federal and state agencies, like the NC Natural Heritage Program, just as one example (<https://www.ncnhp.org/conservation/north-carolina-conservation-planning-tool>), as well as local land trusts, we are not aware of another initiative of this kind that is grassroots based and supported by a local government. Plans that have been developed and implemented by local land trusts have been successful in expanding and protecting natural, cultural and tourism resources. With county support, broad stakeholder input and the expertise of Equinox and project partners, there's no reason to believe that this plan won't be successful.

Describe what previous experience applicant has in successful execution of similar endeavors

Website

<https://mountaintrue.org/>

Social Media Channels - paste URLs below

<https://www.facebook.com/mountaintruewest>
<https://www.instagram.com/mtntrue/>

Amount of Funds Requested? \$40,000

Date Funds Needed Sep 16, 2024

Give a narrative description of how this project will increase tourism and visitation in Jackson County

As shared above, sustainable travel practices, which includes options for minimizing environmental impacts, respecting the culture and resources of the travel destination, and development of eco-friendly activity options, are increasingly important to tourists. In fact, based on the 2022 study discussed above on average, consumers are willing to pay 38% more to make their travels more sustainable.

One example is the growth of the fly-fishing industry, which according to the NC Wildlife Resources Commission, statewide had an economic impact of \$1.38 billion in 2022, more than tripling in only a few years from 2014. Jackson County is the North Carolina Trout Capital and has actively and appropriately marketed the extensive fly-fishing opportunities in the county.

In other words, this project and resulting plan will help identify, expand, and publicize the natural attributes that make Jackson County such a desirable destination for the eco-tourists, and ways that such attributes can be conserved and expanded in order to sustain and foster the eco-tourist demographic. We believe absolutely that having this plan available online would generate overnight visits to Jackson County.

It is also clear that preserving healthy forests, outstanding viewsheds and clean streams will be key to keeping Jackson County as a highly desirable destination to visit or live. There is a large body of data indicating how healthy natural resources enhance and increase surrounding property values.

As ULI stated "Great resort communities always have a few things in common. They respect nature and history. They have a distinctive and memorable character." As recently reported by the Smoky Mountain Host Network, there has been major growth in outdoor recreation such as fishing and biking, and the two largest attractors of why people visit our region are Hiking 73% and Nature viewing 100%."

As mentioned above, the scale and scope of this plan covers District 4. However, the intent of the County Commissioners, and others involved to this point, is that this report could be leverage for the benefit of the other Districts in Jackson County if so desired, and potentially even for neighboring counties thus expanding potential benefits across the county.

If this initiative has occurred before, what is new that differentiates it from prior years?

This initiative has not occurred before in Jackson County.

What is your advertising and marketing plan for your initiative?

As discussed above, the project will get significant exposure and publicity during its completion through the establishment of stakeholders' groups and listening sessions throughout southern Jackson County over a period of many months.

Further, it is expected that the results of the final report, including assessments and recommendations, will be made widely available showcasing Jackson County's proactive effort to care for its special natural resources.

Consequently, it would be leveraged by the many industries that serve both residents and short-term visitors such as real estate, hotel, restaurant, fishing, rafting, Christmas tree farms, etc. Due to partial funding by Jackson County results of this assessment will also presumably be made available through Jackson County government channels for County-wide.

Additionally, partners MountainTrue and the Highlands-Cashiers Land Trust will employ social media and other channels in order to solicit input, provide status updates as appropriate, and to disseminate final results.

In all, the project should result in many instances of public exposure, active solicitation of feedback, and results that can be replicated throughout Jackson County. Jackson County TDA will be credited on all final deliverables.

Do you agree to acknowledge the 'Jackson County TDA' in materials as required? Any releases or ad placements should have a statement that "the event was made possible, in part, by the Jackson County TDA." Print ad placements, where/when possible should include the JCTDA logo.

Yes

Total anticipated cost of initiative

180000

Total funds your organization will provide toward total cost?

0

Detail funds requested from other sources and note commitments or anticipated receipt of funds from other sources

Jackson County commissioners have already provided \$80,000 of public funding for this project.

MountainTrue has applied to both the Cashiers Community Fund and The Community Foundation of WNC Natural Resources focus area opportunity (by invitation only). We should hear from both of these funding sources in early August.

A limited amount of funds has been committed by private donors (local residents) to fill gaps in grant funding.

MountainTrue and the Highlands-Cashiers Land Trust have already dedicated significant internal resources to this project and are committed to continuing to do so for the duration of the project.

Open Space Institute (OSI), a large national conservation organization with presence in North Carolina, has also committed in-kind support for data capture, modeling and analytics required by the project for both ecological and socioeconomic data insights.

Please upload your detailed budget, including event or initiative expenses and revenue. You can attach a spreadsheet (Excel), PDF, or Word Document.



MountainTrue_Detailed Budget_Jackso... .pdf
130.72 KB

Upload any supporting documentation for your application here:



Equinox Proposal_D4_Conservation Pla... .pdf
189.63 KB



HCLT Letter of Support July 2024.pdf
215.31 KB



Jackson County Planning LoS_OSI.pdf
154.45 KB

Is there anything else you'd like to add?

I don't think anyone would dispute the fact that Jackson County's economy and tourism industry are largely based on the quality and health of our natural and cultural resources. The purpose of this initiative is to ensure that we continue to have high quality natural and cultural resources in the southern part of Jackson County for generations to come. The Plan will also serve as model to be leveraged for the benefit other Districts in Jackson County and other WNC counties.

Signature:





Highlands-Cashiers LAND TRUST

"Saving Special Places since 1909"

July 3, 2024

The Community Foundation
of Western North Carolina
Attn: Grants Review Committee
4 Vanderbilt Park Drive, Suite 300
Asheville, NC 28803

Dear Grants Review Committee Members:

On behalf of the Highlands-Cashiers Land Trust please accept this letter of support regarding MountainTrue's request for funding related to "Creating a Long-Term Conservation Plan for Jackson County's District 4."

The Highlands-Cashiers Land Trust is committed to conserving the natural resources of western North Carolina. Faced with unprecedented development pressures, from an operational perspective this mission involves working with stakeholders to thoughtfully balance responsible development while protecting our area's unique and irreplaceable attributes.

To that end, for the past two years we have committed significant internal resources toward the creation of a comprehensive conservation plan for southern Jackson County. This effort, a primary recommendation of a 2022 study by the Urban Land Institute, has involved collaborating and building consensus with involved citizens, organizations, and governmental entities. The critical next step in this process is to engage the appropriate professional consulting group to coalesce these concerns and identify strategic, realistic implementation alternatives as part of a comprehensive conservation plan.

From a practical standpoint land planning decisions are often irreversible. Accordingly, the timeline for this project is of paramount importance. The Highlands-Cashiers Land Trust deeply appreciates MountainTrue's ability to facilitate the contract for the appropriate conservation consulting professionals and thus fully and enthusiastically supports their request for funding assistance for same.

Thank-you for your support of conservation in western North Carolina.

With appreciation,

Lance Hardin
Executive Director



Board of Directors

Carlton King, President
Bill Mauldin, Vice President
Martha Wright, Secretary
Karen Patterson, Treasurer

Brad Armstrong
Charles Auster
Lawrence Dimmitt
Wally Evans
Hugh Fitzpatrick
Rick Hildbold
Tom Holmes
Chris Hohlstein
Ann Huckstep
Russ McLauchlan
Amy Patterson
Victoria Stephens
Bill Stiefel
Walter Wingfield
Jeff Zahner

Staff

Executive Director
Lance Hardin
Development Director
Julie Schott
Land Conservation Director
Andrew Renfro
Stewardship Manager
Stephanie Contreras
Education Coordinator
Hope Corbin
Resilience Corps NC Member
Jessica Blackburn



**OPEN SPACE
INSTITUTE**

Jackson County Commission
c/o Darlene Fox
Jackson County Finance Director

May 10, 2024

Dear Ms. Fox:

The Open Space Institute (OSI) fully supports conservation planning efforts in District 4 of Jackson County, North Carolina. Sited within the Southern Blue Ridge, arguably one of the most biodiverse and biologically intact areas in the temperate world, Jackson County is under increasing development and land conversion pressure. These unique natural resources are clearly a major economic driver for Jackson County. Developing a stakeholder-driven science-informed comprehensive conservation strategy will help the county achieve the ULI goals of responsible growth in coordination with public and private efforts to ensure that critical lands and wildlife habitat are protected through thoughtful policy and direct protection. We also applaud the strategy of developing the plan for District 4 with an eye to leverage this work across the entire county should the Commission choose to do so.

Backed by decades of conservation planning experience across the eastern United States, OSI stands ready to provide in kind assistance to Equinox, the steering committee, and stakeholder groups including providing conservation planning data, methodology support for analysis, and interpretation of the results, if needed. OSI has supported the generation of hundreds of conservation plans and has provided technical assistance for projects ranging from federal planning efforts to those of local watershed groups and economic development groups.

OSI has nearly twenty years of experience supporting land conservationists in western North Carolina. Through grants and loans, we have deployed more than \$10 million to the region supporting the protection of tens of thousands of acres by myriad conservation partners and are hopeful that we can support additional protection efforts within Jackson County.

We appreciate the opportunity to express our support for this project.

Sincerely,



OPEN SPACE
INSTITUTE

Joel Houser
Director of Capital Grants

BUDGET - Eco-Tourism and Conservation Initiative for Southern Jackson County

Enter your organization's name here:

MountainTrue

INCOME

Funding Sources for this Program/Project <small>Be specific, EXCEPT for individual donor names.</small>	Total Amount	Designate the status of these funds as - Pending or Committed (if pending include an anticipated decision date)	Explanatory Notes (Optional)
Jackson County TDA	\$40,000.00	Request	
Jackson County Government	\$80,000.00	Committed/Received	These funds are already on hand.
CFWNC - Cashiers Community Fund	\$10,000.00	Decision pending in August	
CFWNC - Environment Focus Area Grant	\$50,000.00	Decision pending in August	A limited amount of private contributions from local residents has been committed to fill gaps in grant funding for the Equinox contract.
Total Income	\$180,000.00		

EXPENSES

Item	Total Cost	Amount of Jackson TDA Grant to be used for this item	Explanatory Notes (Optional)
Project Contract with Equinox Environmental	\$167,500.00	\$40,000.00	
MountainTrue project management expenses	\$12,500.00	\$0.00	No Jackson County or TDA funds will be used for this line item. If sufficient grant funds from other sources are not received, MountainTrue will donate these expenses.
Total Expenses	\$180,000.00	\$40,000.00	

MountainTrue maintains an operating reserve sufficient to sustain the organization for up to 3 months.

Schedule A: Jackson County District 4 Conservation Plan

Introduction & Understanding

Southern Jackson County, NC, is a unique and special place. For decades, its rural feel, outstanding access to natural resources, and concentration of diverse economic opportunities have captured the interest of many folks seeking their niche in western NC. It is also a place with many natural assets: prominent ridgelines, steep, rocky slopes, abundant water resources, a wealth of conserved and publicly held lands, and remarkable natural heritage.

In the past decade, Cashiers and the surrounding areas in southern Jackson County have experienced a sharp increase in development pressure. To stay abreast of potential changes to the character of the community, in 2019 the Jackson County Board of Commissioners adopted the Cashiers Small Area Plan, sponsored by the Cashiers Area Community Planning Council, financed by the county, and created with widespread community input. The Plan represents the vision of Cashiers' seasonal and year-round residents, both new and generational, and includes business owners. It is intended to guide Jackson County decision makers in the use of County and regional resources for projects relevant to the community.

In February 2022, the Urban Land Institute (ULI) was hired by the Cashiers Chamber of Commerce to study the current development trends in the Cashiers region and make recommendations on how to retain its sense of place through design. Using the Small Area Plan as a guide, ULI developed a series of recommendations for Cashiers to retain its rural and small-town character through insightful planning, progressive regulations, and proactivity. Their top recommendation was to "create a long-term conservation plan for the Cashiers area that identifies critical natural areas, steep slopes, green spaces, and scenic views that should be permanently protected".

Following ULI's recommendations, the Cashiers Community Coalition (CCC) was formed, with the Chamber of Commerce serving as convener, and a small group within the CCC was designated to spearhead the conservation plan effort. That group (Gary Wein & Lance Hardin from HCLT, together with Bill Horton) began planning the development of recommendations on conservation-focused policy changes. They conducted meetings with town and county officials and key stakeholders; Highlands-Cashiers Land Trust provided conservation input and mapping support. Upon further discussions and hearing recommendations from commissioners, it was recommended to expand the scope to encompass the entirety of Jackson County's District 4, which includes the following six Townships (from north to south): Caney Fork, Canada, River, Mountain, Hamburg, and Cashiers.

With the enlarged focus area and diversified stakeholder group, the CCC recognized the need for professional assistance to guide the planning process with an independent, objective, science-based approach. As such, Equinox proposes to work in tandem with the CCC, Jackson County government, and the Chambers of the District's townships, to develop a District-Wide Conservation Plan that assesses the conservation priorities of those communities and generates supporting policy recommendations to ensure that their rural, scenic, and natural character are conserved in the face of increasing development pressure.

Task 1. Project Discovery: Download / Kick-off / Goal Setting (\$15,500)

Download

HCLT and the CCC have completed a significant amount of preliminary work on scope, priorities and opportunities associated with the Conservation Plan. As such, Equinox will begin with a preliminary meeting with the leadership group from the CCC previously tasked with driving the ULI conservation plan recommendation. In this meeting we will review in detail their discoveries, progress, and preliminary thoughts that have been developed thus far, which will help streamline the project discovery and avoid repetitive efforts when coordinating with other Townships within the District. Equinox will summarize this information and provide it to other Townships to reference during the initial steps of the process.

Steering Committee & Key Stakeholder Identification

Equinox will work with the CCC and the commissioners to identify and appoint members and a Chair to the Steering Committee, which will be the over-arching decision-making body during the planning process. The Steering Committee will communicate with Equinox on project management needs, participate in monthly meetings and public sessions, promote collaboration between stakeholders, and review and provide comments on deliverables. To promote productivity and efficiency within the Steering Committee, Equinox suggests limiting the number of members to a maximum of 12; furthermore, we recommend including the District 4 Commissioner as an ad hoc advisory member.

Equinox will then work with the Steering Committee to identify key Stakeholders, who may include but are not limited to local officials, businesses, land conservancies, and others within the Townships. We envision 3 to 6 stakeholders per township, for a total ranging between 18 to 36 stakeholders. Equinox knows that consistent, concise communication will be paramount for managing such a large stakeholder group; we will also expect the Steering Committee to be active and engaged with stakeholders to maintain trust and unity throughout the process.

Kick-Off, Vision & Goal Setting Meeting

Following the formation of the Steering Committee and identification of key Stakeholders, Equinox will lead an in-person kick-off meeting with the Steering Committee. The goals of the meeting are as follows:

- Summarize and leverage all the recommendations from ULI and the work of the CCC Conservation Plan team as foundational information regarding vision, goals & focus areas.
- Confirm consensus on the key conservation related focus areas (e.g. Open Space, buffers, etc.) leveraging prior work with the Planning Department
- Establish the over-arching conservation priorities of the Townships within the District.
- Review the proposed schedule, milestones, and steering committee involvement in the planning process. Monthly meetings (virtual) will be scheduled with the steering committee.
- Develop a Vision and Goals statement to guide the planning process. The kickoff meeting will include a visioning exercise with the steering committee.

Visioning and goal setting are critical first steps in the conservation planning process. They establish guidelines for the project and ensure the development of the plan is consistent with the vision of the steering committee and meets the needs of the client. Equinox will develop a vision and goals survey to be

completed by all Steering Committee Members prior to the kickoff meeting so Equinox can share the findings from the questionnaire at the first meeting. The discussion of vision and goals during the meeting will clarify how to make the Conservation Plan an asset for the communities within the District and meet the needs and specific program goals of the client and key stakeholders.

Task 2. Inventory & Assessment of Conservation Resources (\$18,000)

Data Acquisition, Identification of Data Needs, and Desktop Analysis

Equinox will begin by collecting as much existing resource-related data as is available for District 4 from all identifiable sources. This data will include completed or ongoing plans and studies pertaining to resources within or adjacent to the Township.

We understand that certain site-specific information, including maps and constituent data, will be provided by HCLT and other steering committee members, as well as by key stakeholders. We also know that there may be public information available from other planning efforts that have occurred within the region.

Furthermore, we recognize that additional relevant data to be collected and analyzed may be housed primarily in local or statewide GIS (Geographic Information Systems) databases, or in standalone reports generated by local, state, or federal agencies. The opportunity to identify and close critical gaps in data is an important component of this task.

Current Ordinance Review and Summary

A review of all pertinent local ordinances, zoning and conservation easements across the District will be prepared for inclusion in the document. We recognize that some of the Unified Development Ordinances (UDOs) pertaining to various regulated areas within the district Townships may be updated while we are working on the project. If necessary, Equinox will meet with regulatory personnel to determine and clarify any county ordinance requirements; we will also meet with local officials in those areas to discuss imminent changes to the UDO that may affect the conservation planning process. The intent is to avoid any conflicts knowing that there will be aspects of the Conservation Plan that may not apply in various UDO regulated districts, and other Plan aspects that may be present in a different way in those districts.

Task 3. Resource Analysis-Developing Composite Maps (\$17,500)

Suitability Assessment for Conservation Land Development

A desktop analysis will be used to understand the suitability of lands for a range of development opportunities and provide focused study on the most developable areas of the township; more importantly, this exercise will also highlight the areas that are imperative to conserve. A wide range of potential land-uses such as residential, agricultural, recreational, commercial and transportation will be considered, representing multiple stakeholder perspectives. “Developable” factors will include all key ecological considerations, together with potential land uses and the ULI/UDO focus on the preservation of the “character” of the Townships within the District.

Case Study Review

To help guide the project, Equinox will assess other conservation plans in communities of similar population size, density, rural/urban make up, physiography, and ecology as those within District 4. This analysis will provide information on how to successfully address issues such as clean water, dark skies, steep slopes, viewshed protection, land protection, etc. Equinox will provide an analysis on elements that make the plans successful or unsuccessful and use this to inform the Conservation Plan. A summary of this research will be

included in the document. Other relevant economic data (outdoor recreation value, cost of community services, etc.) may be included to refine the case study.

Task 4. Client, Stakeholder, & Public Engagement Process (\$48,500)

Steering Committee Meetings

As noted in the project kickoff, a schedule of monthly meetings will be developed to ensure that the Client and steering committee stay informed on the project's progress. Like any formal voting body where a quorum is required, steering committee members should commit to 75% attendance; this will help maintain consistency and diversity of opinion when critical decisions need to be made by the committee. To ensure the meetings are accessible to all schedules, we recommend they be hosted virtually. When it is necessary, meetings can be held in person, but this has not been accounted for in the budget and would be an additional service if requested to accommodate travel time and travel expenses.

Stakeholder Outreach

Our team will develop a stakeholder/public input schedule that includes a list of tasks and events that will occur throughout the life of the project. Prior to meeting with stakeholders, our team will share the schedule with the Steering Committee and receive feedback.

We will begin stakeholder outreach with virtual meetings where we will provide a list of questions to help determine which elements should be considered in the Conservation Plan. Up to 10 stakeholder meetings will be conducted with the focus groups representing different sectors that have a vested interest in the Conservation Plan. Meeting minutes for all meetings will be recorded and provided to the Steering Committee. Once meetings are completed and summarized, our team will incorporate them into the conservation plan in a format that lists the stakeholders and summarizes key findings from outreach sessions. A full set of meeting minutes will also be provided as part of the appendix of the overall planning document. Additionally, following the meetings we will coordinate with stakeholders to promote public engagements and provide information on future involvement.

Public Engagement

Our team will provide materials for the public meetings such as analysis and mapping. Information and boards will be created specifically for interactive feedback. The Equinox Team will work with the CCC Plan working group and Steering Committee Chair beforehand to coordinate constituent elements of the meetings, including assistance with planning for and developing materials to present, and the will lead the public meetings. The following will occur to solicit public feedback:

Public Meetings

Two public meetings will be held in the early stages of the public engagement process to provide basic information on the project, vision, and goals for the conservation plan, and gain initial input on what the public would like to see. These meetings will be in-person with a virtual option for remote participants to listen and provide feedback in a chat setting, and the CCC Plan working group and Steering Committee Chair will lead coordination on location of venues. Equinox will provide two staff members for each meeting. Equinox will work with the CCC Plan working group and Steering Committee Chair to capitalize on lessons learned from UDO & ULI attempts to optimize attendance and value of the public meeting.

Public Survey

Our team will develop a public survey that is promoted by the CCC Plan working group and Steering Committee Chair, Village Green, and key stakeholders. We envision that the CCC Plan working group and Steering Committee Chair along with key project partners will use both online and in-print advertisements to promote the survey and garner a robust set of respondents. The CCC Conservation Plan working group has formed a “Public Engagement & Education” group that can assist with the public survey phase along with others from different townships. Equinox will summarize the results into key findings.

Summary of Public Input

Our team will provide a comprehensive summary of public input to include in the final Conservation Plan. This will include a timeline of the public/stakeholder process, key takeaways from stakeholder input, and key findings and input from the public.

Task 5: Recommendations (\$30,300)

Conservation Priorities

The results of our Assessment and Analysis, in conjunction with the output from the Steering Committee meetings and Public Engagement process, will inform the development of a draft list of Conservation Priorities. Once a robust list is generated, we will guide the stakeholders through a prioritization process to finalize the primary and secondary Conservation Priorities. The prioritization process will be conducted over a virtual meeting and the results summarized into a report. The recipients of this report and recommendations will include Township officials and the Jackson County Planning Dept, Planning Board, and Commissioners.

Best Practices

Our team will develop a suite of Best Practices for addressing the preservation of the various Townships’ natural resources (e.g. intact forestlands, wildlife corridors, watercourses & wetlands, prime soils, rare species, etc.) based on primary and secondary Conservation Priorities identified by the stakeholders. Best practices are non-regulatory recommendations that guide or incentivize developers to implement measures that protect, enhance, or restore existing natural resources.

Policy Recommendations

Equinox will use the results of Steering Committee meetings and Public Engagement in tandem with any updates to Unified Development Ordinances to develop a series of recommendations that address policy changes for the various Townships to help protect and enhance their existing natural character and assets. Policy recommendations will pertain solely to District 4 but will be developed in a manner such that they would be acceptable and manageable at a broader jurisdictional level. This approach will allow for the possibility of using District 4 as a “Test District” with an eye to potentially leveraging parts of this Plan for the benefit of other districts in Jackson County in the future.

Task 6. Conservation Plan Document (\$37,700)

Draft Conservation Plan

During this task, Equinox will draft the conservation plan document then solicit comments from Stakeholders and partners on the draft using an interactive virtual platform (e.g. Adobe). Equinox will collate written feedback into a summary document then distribute the summary for digestion by partners.

If needed, Equinox can bring all parties together for a virtual meeting to discuss particular points that cannot be resolved without deliberation. The Conservation Plan Document may include some or all the items on the following page:

Conservation Plan Document

- Executive Summary
- Inventory and Assessment of Conservation Resources
 - Summary of other planning efforts
 - Mapping of existing resources
- Analysis of Resources
 - Suitability Assessment
 - Ordinance Review
 - Case Study Summary
- Public/ Stakeholder Engagement Summary
 - Public Meetings
 - Stakeholder Engagement Summary
 - Leadership Engagement Summary
- Recommendations
 - Conservation Priorities
 - Best Practices for the future
 - Policy Recommendations
- Maps

Final Conservation Plan

After final comments of the draft have been provided to Equinox the final Conservation Plan document will be developed and delivered to the Client, Steering Committee, and Stakeholders. This task will include:

- Final Deliverables Production
- Final Project Meeting with Client
- Project Close Out

Assumptions & Client Needs

- *The Steering Committee Kickoff meeting will be in-person, whereas all other meetings will be held remotely.*
- *The CCC Plan working group and Steering Committee Chair will help organize the space and logistics for the public meetings and Equinox will facilitate the public meetings*
- *One round of revisions for the review of the document*
- *Timely decisions and direction from the CCC Plan working group and Steering Committee Chair for key aspects of the project*

Additional Services

Any service not described above will be considered an additional service outside this scope of work and proposal. If additional services are needed, they will be issued by written agreement from the Client. Additional work will not be provided without approval from the Client.

Schedule

Once a signed contract is received, Equinox will develop a project schedule with milestone timelines. Equinox anticipates a project of this scale and scope to take 12 months to complete.

Compensation

Equinox will provide the above services as described in this proposal for a fixed fee of \$167,500. This cost includes expenses such as mileage, travel, and printing. Equinox shall satisfactorily perform all the work tasks as outlined in the “scope of services”.

Equinox will require an initial up-front payment of \$15,500 (equaling the amount scoped for Task 1). For Tasks 2-3, Equinox will bill the full amount upon Task completion. For Tasks 4-6, Equinox will bill monthly and include a percent completion on the invoice for each Task.

Invoices will be mailed typically by the 28th of the month within which they are generated, with a payment due date within 30 days of Client receipt of invoice. Invoices that are not paid within 30 days will be assessed a late charge of interest at 3.5% whichever is greater, each pay period.

BUDGET - Eco-Tourism and Conservation Initiative for Southern Jackson County

Enter your organization's name here:

MountainTrue

INCOME

Funding Sources for this Program/Project <small>Be specific, EXCEPT for individual donor names.</small>	Total Amount	Designate the status of these funds as - Pending or Committed (if pending include an anticipated decision date)	Explanatory Notes (Optional)
Jackson County TDA	\$40,000.00	Request	
Jackson County Government	\$80,000.00	Committed/Received	These funds are already on hand.
CFWNC - Cashiers Community Fund	\$10,000.00	Decision pending in August	
CFWNC - Environment Focus Area Grant	\$50,000.00	Decision pending in August	A limited amount of private contributions from local residents has been committed to fill gaps in grant funding for the Equinox contract.
Total Income	\$180,000.00		

EXPENSES

Item	Total Cost	Amount of Jackson TDA Grant to be used for this item	Explanatory Notes (Optional)
Project Contract with Equinox Environmental	\$167,500.00	\$40,000.00	
MountainTrue project management expenses	\$12,500.00	\$0.00	No Jackson County or TDA funds will be used for this line item. If sufficient grant funds from other sources are not received, MountainTrue will donate these expenses.
Total Expenses	\$180,000.00	\$40,000.00	

MountainTrue maintains an operating reserve sufficient to sustain the organization for up to 3 months.