

GROWTH MGT. OPTIONS



College Town. Lake Town. *Your Town.*

Growth Management Options
Board of Commissioners
Jason Burdette, Planning Director & Matt Dellinger, PB Chair
April 27, 2021

GROWTH MGT. OPTIONS

BACKGROUND

- 1. Comprehensive Plan (Jan. 2020):** Includes Growth Mgt. Goals/Policies
 - Goal 2.1 Intentional Growth Management: Use Utility/Annexation Criteria and Growth Management Framework; Explore Zoning Thresholds
- 2. Strategic Plan (March/Aug. 2020):** Includes Growth Mgt. Strategies
 - Goal A: Well-Planned & Livable Community
 - Strategy A2: Formalize Utility/Annexation Criteria, Implement Zoning Thresholds
- 3. Commissioner Discussions (Summer 2020):** Used 2019 Research, Thresholds Drafted
- 4. Public Input Sessions (Summer 2020):** August, September (Virtual)
 - Participants: Wide Participant Range (Many ETJ Residents)
 - Overall Feedback: Thresholds, Applicability, Public Input Process Concerns (i.e., Slow Down)
- 5. Planning Board Committee Created (Fall 2020):** Explore Growth Mgt. Tools & TCZ Options
- 6. Planning Board Committee Options (Dec. 2020):** Report Findings/Recs
 - Primary Strategy: Codify Growth Management Framework and Utility Service and Annexation Criteria
 - Supporting Strategies: Improve Development Process; Address Building Compatibility, Integration, & Affordability; Utilize Conditional Thresholds



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BOC FEEDBACK AND GOALS /PBC RECS

CONCERNS SHARED BY BOC

1. **Process:** Unpredictable Development Process
2. **Input:** Process Lacking Early/Meaningful/Consistent Public Input
3. **Character:** Loss of Small-Town Character
4. **Context:** Scale, Respect for Existing Conditions
5. **Housing:** Need for Affordable Housing

GOALS/ASPIRATIONS

1. **Strategy:** Proactively Manage Growth
2. **Process:** Generate Exceptional Public participation
3. **Housing:** Increase Housing Integration, Diversity, and Affordability
4. **Community Character:** Respect/Enhance Through Preservation and Growth
5. **Equity:** Foster an Equitable Process/Outcomes

COMMITTEE RECOMMENDATIONS (DEC. 2020)

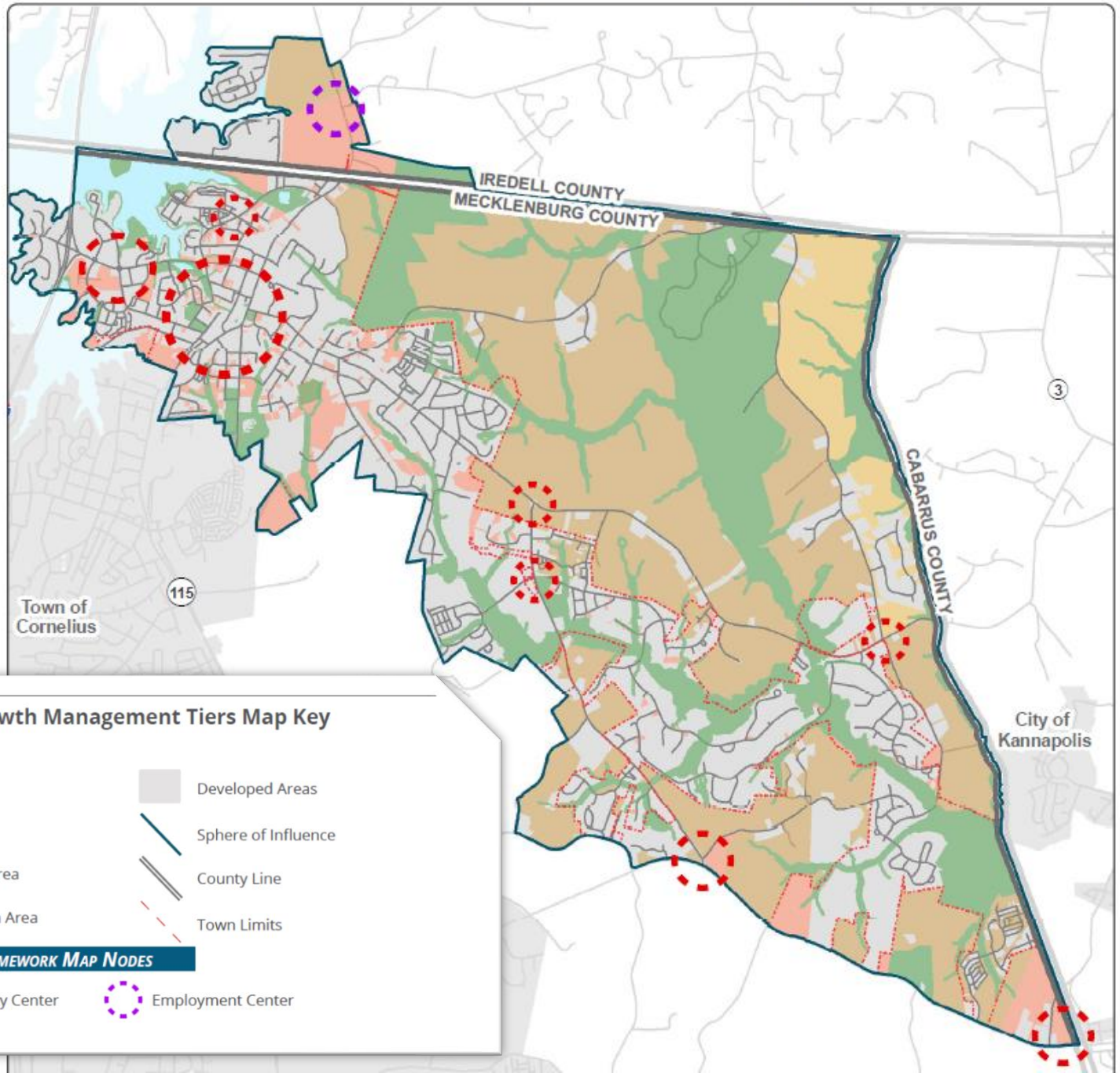
Primary Strategy:

- **Option B:** Codify Growth Management Framework, Utility and Annexation Criteria

Supporting Strategies:

- **Option C:** Improve Development Process
- **Option D:** Address Building Compatibility, Integration, and Affordability
- **Option A:** Utilize Conditional Thresholds

Growth Management Tiers Map



UTILITY SERVICE AND ANNEXATION CRITERIA

In the State of North Carolina, a property can only be annexed into a municipality as a voluntary action by the property owner. It is the town's policy that if a property owner requests public water and wastewater services, it must voluntarily annex into Davidson. Town policy currently requires approval of the utility extension by the Davidson Board of Commissioners prior to approval by Charlotte Water. The Davidson Planning Ordinance requires that if a property lies within 1,000 feet of an existing or planned (i.e., funded) sewer line and elects to develop, then the proposed development must connect to that line and be served by public water and sewer. This is due to the long-term efficiencies and environmental advantages of public systems compared to individually-maintained septic systems.

To assist with annexation and utility extension decisions, the following criteria should be evaluated for individual requests. Specifically, requests that support the following should be considered for approval:

Criteria 1: Aligns with the Comprehensive Plan

Consistent with the Comprehensive Plan, specifically the Growth Management Tiers Map and Conservation and Growth Framework Map

Criteria 2: Contiguous with Town Boundary

Portion of the site lies contiguous with town boundary

Criteria 3: Creates Logical Town Boundaries

Expansion of logical town boundaries and service areas and elimination of unincorporated islands within the town's corporate limits

Criteria 4: Consistent with Interjurisdictional Agreements

Consistent with the Davidson-Kannapolis Annexation Agreement and other agreements (i.e. Mooresville Boundary Agreement)

Criteria 5: Supported by Public Services

Adequately supported by current or future town services, including public safety and other services

Criteria 6: Demonstrates Community Benefits

Community benefits clearly assessed against the fiscal benefits and costs

Criteria 7: Utility Service

Adequate utility services to the site can be provided by Charlotte Water, Duke Energy, etc.

Criteria 8: Supported by Public Schools Framework

Considers CMS expansion/services plans

Criteria 9: Consistency with Transportation Investments

Proposal location situated in an area prioritized for transportation projects

PROCEDURAL APPROACHES W/ OPTIONS

OPTION B

PRIMARY STRATEGY – OPTION B: CODIFY THE GROWTH MANAGEMENT FRAMEWORK; ADOPT THE UTILITY SERVICE AND ANNEXATION CRITERIA (USAC)

- **Option B, Approach 1: Adopt the Growth Management Tiers Map by reference in the DPO, with a framework for implementation.**

Implementation Considerations:

- A. Parcels located in the Primary and Secondary Growth Areas require administrative approval.*
- B. Consider different options to require legislative approval (BOC) for development in the Growth Reserve Areas (i.e. adjacency to activity node, adjacency to existing water/sewer)*

****[PBC recommends A, PBC believes B needs further exploration]****

PROCEDURAL APPROACHES W/ OPTIONS

OPTION B

PRIMARY STRATEGY – OPTION B: CODIFY THE GROWTH MANAGEMENT FRAMEWORK; ADOPT THE UTILITY SERVICE AND ANNEXATION CRITERIA (USAC)

- **Option B, Approach 2: Adopt the Utility Service and Annexation Criteria (USAC) by reference in the DPO.**

Implementation Considerations:

- A. *DPO requires USAC checklist with Preliminary Sketch Plan submittal*
- B. *USAC reorganized into sections and adapted to include relative evaluation measures (i.e., quantitative or qualitative scoring)*
- C. *Existing water/sewer policy repealed and replaced with updated USAC*
- D. *After Preliminary Sketch Plan approval and prior to submittal for Master Plan Schematic Design, a decision is made on utility provision and intent to annex based upon the USAC checklist. Decision options include:*
 - i. BOC: *BOC makes determination based upon USAC checklist*
 - ii. Town Manager: *Town Manager makes decision based upon USAC checklist*
 - iii. Planning Board + BOC: *Based upon USAC checklist, Planning Board makes formal recommendation to BOC, who makes determination.*
 - iv. Planning Board + Staff: *Based upon USAC checklist, Planning Board makes formal recommendation to staff, who makes determination.*

****[PBC recommends A, B, C, and D, with D(iii) recommended for decision-making where the Planning Board uses the USAC checklist to make a formal recommendation to the BOC]****

PROCEDURAL APPROACHES W/ OPTIONS

OPTION B SUMMARY

PRIMARY STRATEGY – OPTION B: CODIFY THE GROWTH MANAGEMENT FRAMEWORK; ADOPT THE UTILITY SERVICE AND ANNEXATION CRITERIA (USAC)

- **Option B, Approach 1: Adopt the Growth Management Tiers Map by reference in the DPO, with a framework for implementation.**

*[Parcels located in the Primary and Secondary Growth Areas - administrative approval;
Growth Reserve - further exploration]*

- **Option B, Approach 2: Adopt the Utility Service and Annexation Criteria (USAC) by reference in the DPO.**

[USAC checklist with evaluation measures; USAC replaces water/sewer policy; PB uses USAC to recommend to BOC; BOC makes decision]

OPTION B CONCERNS/GOALS

Concerns Addressed: Unpredictable Development Process; Context

Goals Addressed: Strategy (Pro-active); Community Character; Equity

PROCEDURAL APPROACHES W/ OPTIONS

OPTION C

SUPPORTING STRATEGY – OPTION C: IMPROVE THE DEVELOPMENT PROCESS

- **Option C, Approach 1: Revise the DPO Master Plan and Conditional Master Plan process to include a community meeting *prior* to application submittal.**

Implementation Considerations:

- A. Developer hosts meeting with specific noticing and programmatic requirements, and introduces the project. Developer presents design evolution and documents public input. Clear distinction between Public Input Session (PIS).*
- B. Staff manages meeting*

****[PBC recommends A; aim for comprehensive introduction to the community, understanding of developer and community roles, and opportunity for public comment early in the process.]****

- **Option C, Approach 2: Revise the DPO Conditional Master Plan process to require pre-consultation with PB and BOC *after* community meeting to share input.**

Implementation Considerations:

- A. Just one of the boards (PB or BOC) hosts meeting.*
- B. PB meeting precedes BOC meeting.*

****[PBC recommends B with both the Planning Board and BOC providing feedback on potential conditional rezonings] ****

PROCEDURAL APPROACHES W/ OPTIONS

OPTION C

SUPPORTING STRATEGY – OPTION C: IMPROVE THE DEVELOPMENT PROCESS (Cont.)

- **Option C, Approach 3: Revise DPO to clarify differences between Preliminary Sketch Plan and Master Plan Schematic Design.**

Implementation Considerations:

- A. Modify DPO to distinguish between document types/process.*
- B. Use as process milestones (i.e. PIS report, USAC decision)*

****[PBC recommends both A and B]****

- **Option C, Approach 4: Revise the DPO to clarify PIS timeline a “review” of PIS report.**

Implementation Considerations:

- A. Hold PIS **prior** to MPSD submittal; clarify draft TIA required prior to PIS.*
- B. Hold PIS **concurrent** with initial MPSD submittal; clarify draft TIA required prior to PIS.*
- C. Elaborate developer obligation at PIS (i.e., design evolution, etc.)*
- D. Clarify PIS Report “review” for consistency of information presented vs. input/edits.*

****[PBC recommends B, C, and D with aim of clarifying process points and PIS expectations]****

PROCEDURAL APPROACHES W/ OPTIONS

OPTION C

SUPPORTING STRATEGY – OPTION C: IMPROVE THE DEVELOPMENT PROCESS (Cont.)

- **Option C, Approach 5: Revise DPO to reference USAC and its location in the development process**
Implementation Considerations:
 - A. *USAC decision after PIS and MPSD submittal that includes revisions from public input*
 - B. *USAC decision at end of master plan process prior to staff/BOC action*

****[PBC recommends A with aim to clarify decision points/expectations for USAC.]****

PROCEDURAL APPROACHES W/ OPTIONS

OPTION C SUMMARY

SUPPORTING STRATEGY – OPTION C: IMPROVE THE DEVELOPMENT PROCESS

- **Option C, Approach 1: Community Meeting prior to application submittal**
[Developer-hosted; project introduction; design evolution; education; public input]
- **Option C, Approach 2: Pre-consult with PB and BOC after Community Meeting for CPA**
[PB and BOC both provide feedback on potential CPAs]
- **Option C, Approach 3: Clarify Prelim Sketch and Master Plan Schematic Design**
[Clarify doc. Type/process; milestone triggers]
- **Option C, Approach 4: Clarify PIS timeline and “review”**
[PIS concurrent with MPSD; draft TIA; developer PIS obligations]
- **Option C, Approach 5: Adopt USAC; include in process timeline**
[USAC after PIS and MPSD submittal]

OPTION C CONCERNS/GOALS

Concerns Addressed: Unpredictable Devp't Process; Small-Town Character, Context; Public Input

Goals Addressed: Strategy (Pro-active); Process (public input); Community Character; Equity

PROCEDURAL APPROACHES W/ OPTIONS

OPTION D

SUPPORTING STRATEGY – OPTION D: ADDRESS BUILDING COMPATIBILITY, INTEGRATION, AFFORDABILITY

- **Option D, Approach 1: Revise the DPO to update Floor-Area-Ratio (FAR) in the VIPA**

- Implementation Considerations:

- A. *Revise FAR based upon existing context in each VIPA Overlay District*
 - B. *Revise FAR downward by specific number in all Overlays*
 - C. *Close two FAR loopholes (smaller lot max and unheated area calc.)*

****[PBC recommends both A and C]****

- **Option D, Approach 2: Revise DPO to require lot differentiation, building type maxes for select planning areas**

- Implementation Considerations:

- A. *Require greater mix of building types in Village Infill (VIPA) and Lakeshore (LAK)*
 - B. *Estab. Max percentage of SF homes (non-duplex) in Neighborhood General (50%); Neighborhood Edge (80%); Rural (90%)*
 - C. *Use Building Diversity score to gauge compatibility*
 - D. *Allow Mixed-Village building type in LAK, NG, NE*

****[PBC recommends A, B, C, and D]****

PROCEDURAL APPROACHES W/ OPTIONS

OPTION D

SUPPORTING STRATEGY – OPTION D: ADDRESS BUILDING COMPATIBILITY, INTEGRATION, AFFORDABILITY (cont.)

- **Option D, Approach 3: Use Building Diversity Index to assess compatibility**

- Implementation Considerations:

- A. *Require 0.5 min. score in LAK, VIPA*

- B. *Provide some undetermined incentive if 0.7 or greater achieved.*

****[PBC recommends further exploration of the Building Diversity Score to better understand how it could be utilized.]****

- **Option D, Approach 4: Revise DPO to include improved context-sensitivity requirements**

- Implementation Considerations:

- A. *Require development fronting existing street to include XX% buildings of the same/existing building type on the existing street*

- B. *Within XX feet of existing buildings, height of proposed buildings shall not exceed XX of existing, adjacent development*

****[PBC recommends further exploration of the context-sensitivity requirements to better understand how they could be utilized] ****

PROCEDURAL APPROACHES W/ OPTIONS

OPTION D

SUPPORTING STRATEGY – OPTION D: ADDRESS BUILDING COMPATIBILITY, INTEGRATION, AFFORDABILITY (cont.)

- **Option D, Approach 5: Incentivize Affordable Housing construction on-site via tiered open space reductions**

Implementation Considerations:

A. Reduce the required open space by 5% if 50% of the affordable units are constructed.

B. Reduce the required open space by 10% if 100% of the affordable units are constructed.

****[PBC recommends further exploration of the tiered approach, specifically, which planning areas might be most appropriate for consideration.]****

PROCEDURAL APPROACHES W/ OPTIONS

OPTION D SUMMARY

SUPPORTING STRATEGY – OPTION D: ADDRESS BUILDING COMPATIBILITY, INTEGRATION, AFFORD.

- **Option D, Approach 1: Update FAR in the VIPA**
[Revise FAR based upon existing context; close two loopholes]
- **Option D, Approach 2: Increased lot differentiation, building type maxes for select planning areas**
[Greater mix in VIPA + LAK; max. SF percentages in NG, NE, RPA; permit mixed-village in NG, LAK, NE]
- **Option D, Approach 3: Use Building Diversity Index**
[Min. required; incentives; needs further research]
- **Option D, Approach 4: Use context-sensitivity guidelines**
[Percentage of building type and height allowance based upon existing context; needs further research]
- **Option D, Approach 5: Incent Afford. Housing on-site by tiered open space reductions**
[Tiered approach; needs further research]

OPTION D CONCERNS/GOALS

Concerns Addressed: Unpredictable Devp't Process; Small-Town Character, Context; Afford. Housing

Goals Addressed: Strategy (Pro-active); Housing; Community Character; Equity

PROCEDURAL APPROACHES W/ OPTIONS

OPTION A

SUPPORTING STRATEGY – OPTION A: USE CONDITIONAL THRESHOLDS

- **Option A, Approach 1: Implement conditional thresholds based upon growth management criteria**

Implementation Considerations:

- BOC approval required if the USAC checklist does not meet more than half of criteria (50%) automatically.*
- BOC approval required if project does not meet some min. Building Diversity Index, where applicable*

****[PBC recommends further exploration of the legislative options approach]****

OPTION A CONCERNS/GOALS

Concerns Addressed: Unpredictable Devp't Process; Afford. Housing

Goals Addressed: Housing; Community Character; Equity

DISCUSSION



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