TOD Planning & UDO Visioning

SHAPING OUR FUTURE

Small Group Meetings

Draft: Work-in-Progress

AUGUST 2022

CHAPEL HILL

SOM ORION PLANNING+DESIGN OPD neighboring concepts SRF SBFRIEDMAN

Plan Making Foundations
Market forecast and existing pipeline
Meeting local needs and aspirations
Focus Area and TOD Station Area Scenarios

TOD Planning & UDO Visioning

Advancing adopted plans for Focus Areas and Station Areas
Market and demand analysis - 2040
Master planning and urban design concepts
Demonstrating Town’s Guiding Principles
Evidence for North-South BRT Funding
Implementation strategies
Directions for LUMO rewrite (2023+)

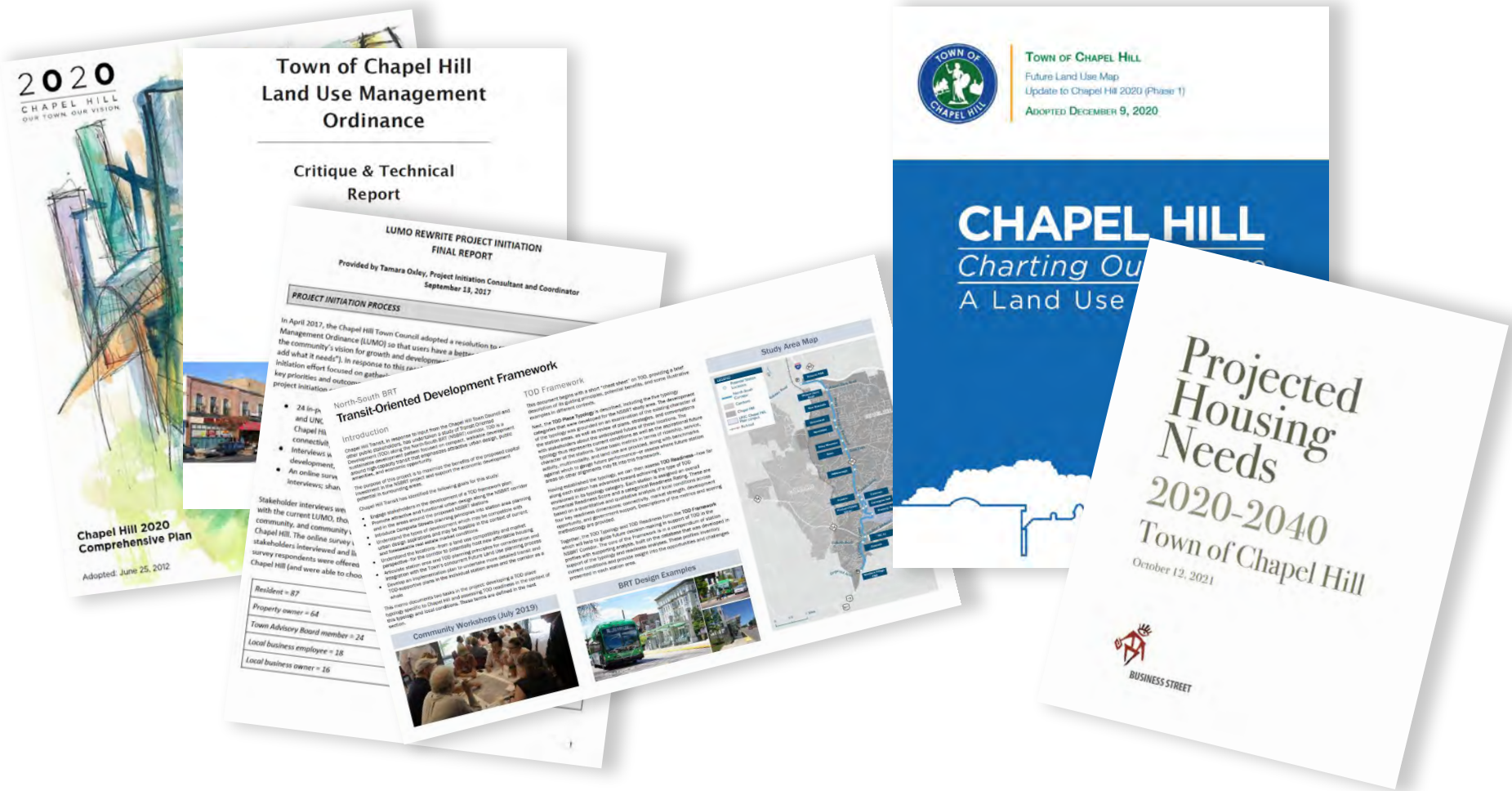
Plan Making Foundations

Market forecast and existing pipeline

Meeting local needs and aspirations

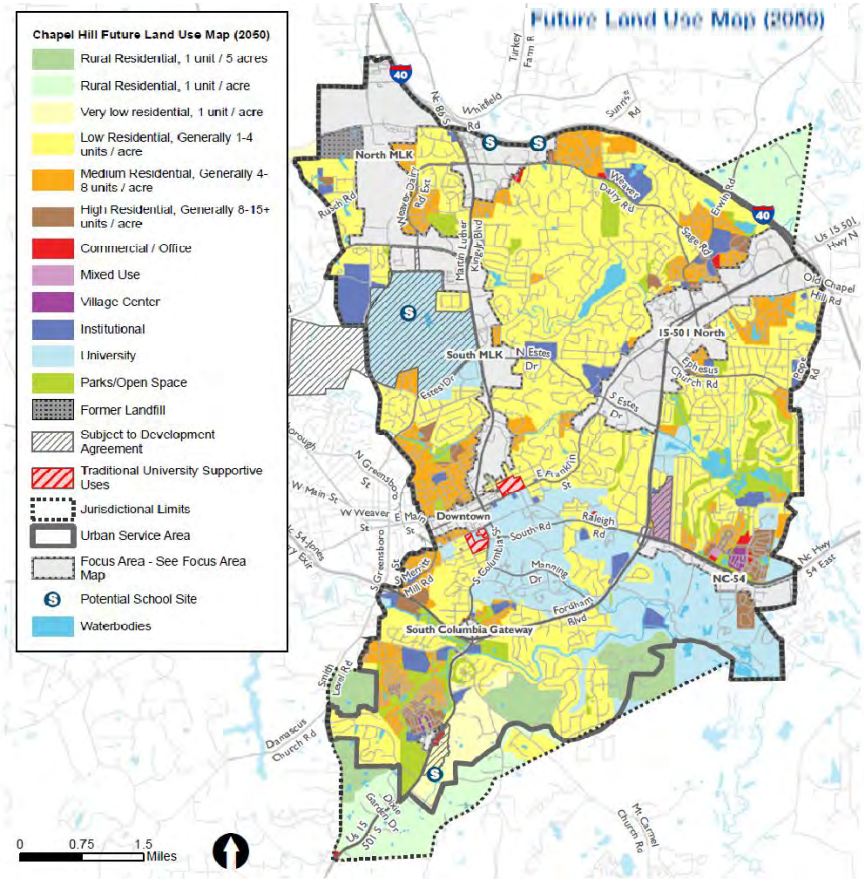
Focus Area and TOD Station Area Scenarios

CHAPEL HILL PLANNING: 2012-2020



CHARTING OUR FUTURE: FUTURE LAND USE MAP (FLUM)

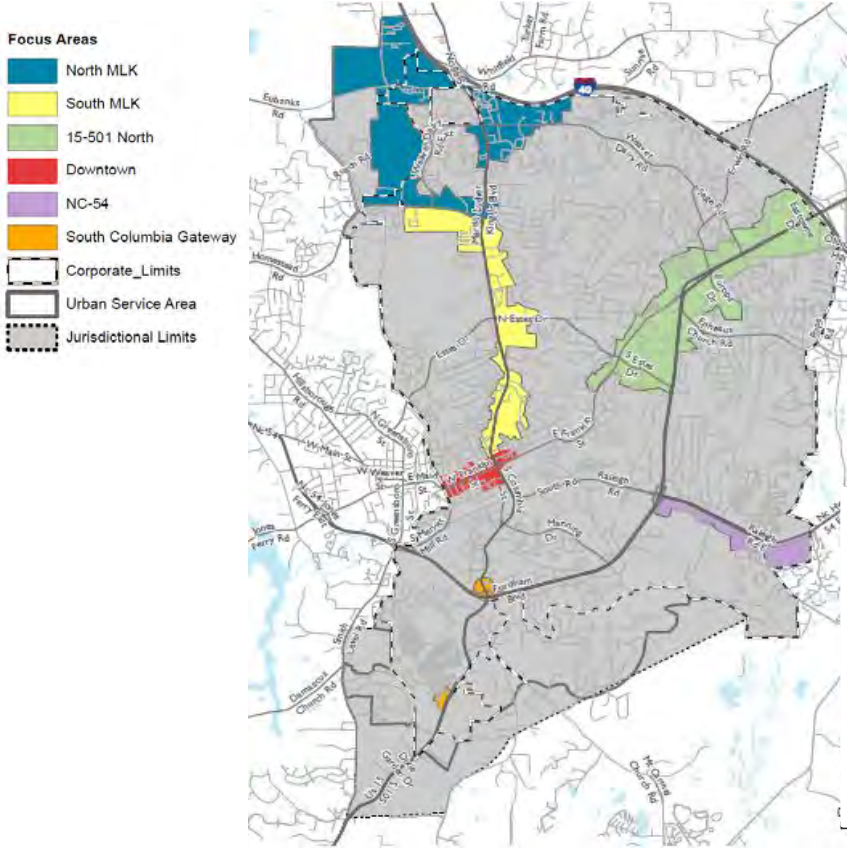
Update to Chapel Hill 2020 (Phase 1) December 2020



"The Future Land Use Map depicts a snapshot into the future of the Town's preferred future mix of land uses… generally guide the Town as to where shopping, houses, apartments, townhomes, offices, and parks should be located"

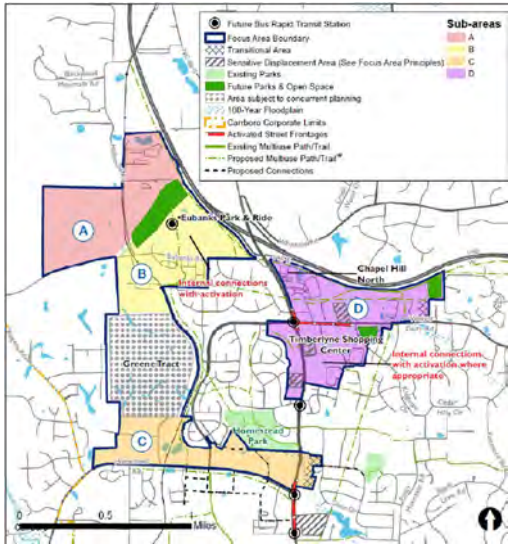
FLUM FOCUS AREAS

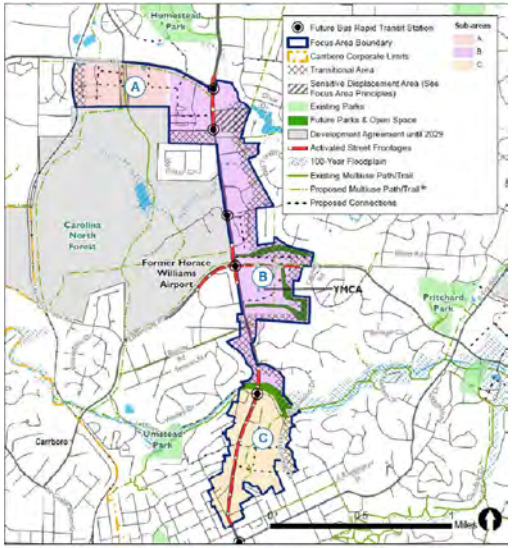
Update to Chapel Hill 2020 (Phase 1) 2020: Focus Areas

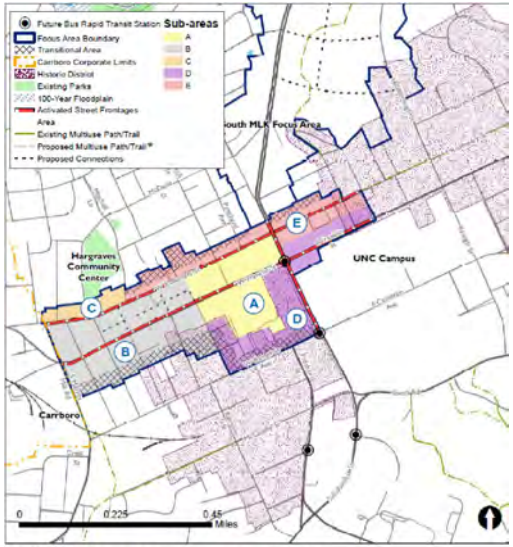


"a vision for the area, a matrix of the preferred and discouraged land uses (described as Character Types) and desirable building heights, a description of the desired form of development, and a set of Focus Area Principles tailored to the unique circumstances of the area."

FLUM FOCUS AREAS: MLK CORRIDOR + DOWNTOWN







* See Mobility Plan for more information about proposed multi-modal improvements

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Character Types and Height in 2050: North MLK Boulevard

● Primary (predominant land uses) ◉ Secondary (appropriate, but not predominant) ⊖ Discouraged

	Sub-Area A	Sub-Area B	Sub-Area C	Sub-Area D
Multifamily, Shops & Offices	⊖	●	◉	●
Multifamily Residential	⊖	●	●	●
Commercial/Office	⊖	◉	⊖	●
Parks and Green/Gathering Spaces	◉	●	◉	●
Townhouses & Residences	⊖	◉	●	◉
Institutional/University/Civic	●	●	◉	◉
Light Industrial	●	◉	⊖	⊖
Typical Height	4-6 stories	6 stories	4-6 stories	4-8 stories
Transitional Area Height	N/A	Up to 4 stories	2-4 stories	Up to 4 stories
Activated Street Frontage Height	N/A	N/A	6 stories	6 stories

Note: Each story is approximately 12 feet tall, but height may vary based on many factors. While suggested heights are noted above, determining the appropriate height for each site will require careful examination of the site and its surrounding context.

Character Types and Height in 2050: South MLK Boulevard

● Primary (predominant land uses) ◉ Secondary (appropriate, but not predominant) ⊖ Discouraged

	Sub-Area A	Sub-Area B	Sub-Area C
Multifamily, Shops & Offices	◉	●	●
Multifamily Residential	●	●	●
Commercial/Office	⊖	◉	●
Parks and Green/Gathering Spaces	●	●	◉
Townhouses & Residences	●	◉	◉
Institutional/University/Civic	●	◉	◉
Typical Height	4-6 stories	4-6 stories	4-8 stories
Transitional Area Height	2-4 stories	2-4 stories	2-4 stories (Adjacent to lower scale residential uses, step backs or other transitional methods are necessary to ensure harmonious transitions)
Activated Street Frontage Height	N/A	6 stories	6 stories, 4 stories at the front setback line

Note: Each story is approximately 12 feet tall, but height may vary based on many factors. While suggested heights are noted above, determining the appropriate height for each site will require careful examination of the site and its surrounding context.

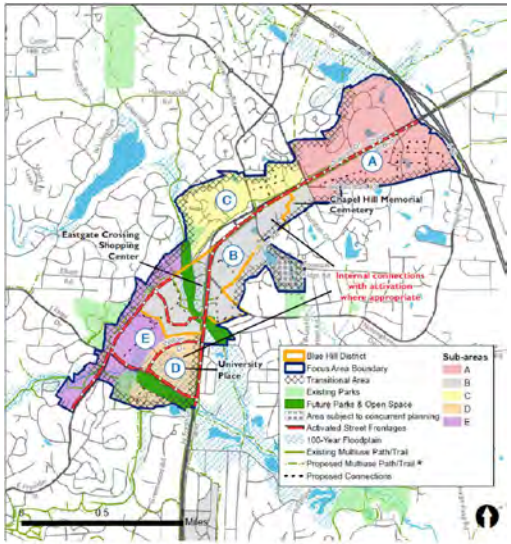
Character Types and Height in 2050: Downtown

● Primary (predominant land uses) ◉ Secondary (appropriate, but not predominant) ⊖ Discouraged

	Sub-Area A	Sub-Area B	Sub-Area C	Sub-Area D	Sub-Area E
Multifamily, Shops & Offices	●	●	●	●	●
Multifamily Residential	◉	◉	●	◉	●
Commercial/Office	●	●	◉	●	●
Parks and Green/Gathering Spaces	●	●	●	●	●
Townhouses & Residences	⊖	⊖	⊖	◉	⊖
Institutional/University/Civic	◉	◉	◉	◉	◉
Typical Height: (Adjacent to lower scale residential uses, step backs or other transitional methods are necessary to ensure harmonious transitions.)	Setback height of to 4 stories, with a core height of up to 8 stories allowed	Setback height of up to 3 stories with a core height of up to 8 stories allowed. No more than approximately 4 stories allowed in the transitional area	No more than 4 stories	Core height of up to 8 stories, with a setback height of 3 stories No more than 4 stories allowed in the transitional area	Up to 4 stories at the front setback. Core height of 8 stories allowed on the south side of E Rosemary and 6 stories on the north side of E Rosemary and along West Rosemary. No more than approximately 4 stories allowed in the transitional area.

Note: Each story is approximately 12 feet tall, but height may vary based on many factors. While suggested heights are noted above, determining the appropriate height for each site will require careful examination of the site and its surrounding context.

FLUM FOCUS AREAS: 15-501 + NC54



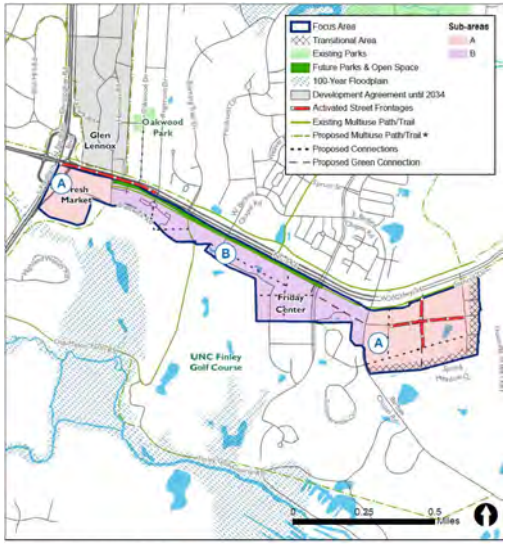
* See Mobility Plan for more information about proposed multi-modal improvements

Character Types and Height in 2050: North 15-501 Corridor

● Primary (predominant land uses) ⊙ Secondary (appropriate, but not predominant) ⊖ Discouraged

	Sub-Area A	Sub-Area B	Sub-Area C	Sub-Area D	Sub-Area E
Multifamily, Shops & Offices	●	●	⊙	●	●
Multifamily Residential	●	⊙	⊙	⊙	⊙
Commercial/Office	●	●	⊙	●	●
Parks and Green/Gathering Spaces	●	●	⊙	●	●
Townhouses & Residences	⊙	⊙	●	⊙	⊙
Institutional/University/Civic	⊙	⊙	⊙	⊙	⊙
Typical Height	4-6 stories	4 stories	4 stories	4-6 stories	4-6 stories
Transitional Area Height	Up to 4 stories	Up to 4 stories	Up to 4 stories	Up to 4 stories	Up to 4 stories
Activated Street Frontage Height	6 stories	6 stories	6 stories	6 stories	6 stories

Note: Each story is approximately 12 feet tall, but height may vary based on many factors. While suggested heights are noted above, determining the appropriate height for each site will require careful examination of the site and its surrounding context.



* See Mobility Plan for more information about proposed multi-modal improvements

Character Types and Height in 2050: NC 54 Corridor

● Primary (predominant land uses) ⊙ Secondary (appropriate, but not predominant) ⊖ Discouraged

	Sub-Area A	Sub-Area B
Multifamily, Shops & Offices	●	●
Multifamily Residential	●	⊙
Commercial/Office	●	●
Parks and Green/Gathering Spaces	⊙	●
Townhouses & Residences	⊙	⊙
Institutional/University/Civic	⊙	●
Typical Height	6 stories	6 stories
Transitional Area Height	Up to 4 stories	N/A
Activated Street Frontage Height	6 stories	N/A

Note: Each story is approximately 12 feet tall, but height may vary based on many factors. While suggested heights are noted above, determining the appropriate height for each site will require careful examination of the site and its surrounding context.

FLUM GUIDING PRINCIPLES

1. Respond to **climate change, environmental stewardship** and **resiliency**

2. **Equity**: benefit low-income residents, communities of color, immigrants, historically excluded and at risk of marginalization

3. **Housing diversity** – missing middle, student housing, single family

4. Distinctive, safe and attractive **neighborhoods**

5. Vibrant and **inclusive community and public spaces**

6. Invest in key **transportation corridors**, promote **transit + multi- modal options**

7. **Economic development**, jobs, entrepreneurship, redevelopment and infill

8. **Transitions** between different uses + scales

9. Preserve and maintain **Chapel Hill's appearance, quality design** + development

10. **Collaboration** with UNC and UNC Health

NORTH SOUTH BUS RAPID TRANSIT (N-S BRT)

8.2-mile lines from Eubanks Road to Southern Village

Faster, more efficient transportation for everyone

- BRT only lanes separate buses from cars
- Traffic Signal Priority systems
- High Capacity, Specialized Vehicles, more riders
- State-of-the-Art Transit Stations
- Multi-use paths along much of the corridor
- Improved pedestrian crossings and cyclist access
- Onboard wireless internet, comfortable seating
- Real-time schedule information.

NORTH-SOUTH BRT TRANSIT-ORIENTED DEVELOPMENT PLAN (2019)

"TOD is a sustainable development pattern focused on compact, walkable development around high-capacity transit that emphasizes attractive urban design, public amenities, and economic opportunity."

- Critical to sustainability goals
- Supports affordable housing and other future development
- Increase transit capacity, connect with the regional transit network

North-South BRT

Transit-Oriented Development Framework

Introduction

Chapel Hill Transit, in response to input from the Chapel Hill Town Council and other public stakeholders, has undertaken a study of Transit-Oriented Development (TOD) along the North-South BRT (NSBRT) corridor. TOD is a sustainable development pattern focused on compact, walkable development around high-capacity transit that emphasizes attractive urban design, public amenities, and economic opportunity.

The purpose of this project is to maximize the benefits of the proposed capital investment in the NSBRT project and support the economic development potential in surrounding areas.

Chapel Hill Transit has identified the following goals for this study:

- Engage stakeholders in the development of a TOD framework plan
- Promote attractive and functional urban design along the NSBRT corridor and in the areas around the proposed NSBRT stations
- Introduce Complete Streets planning principles into station area planning
- Understand the types of development which may be compatible with urban design aspirations and may be feasible in the context of current and foreseeable real estate market conditions
- Understand the locations--from a land use compatibility and market perspective--for the corridor to potentially host new affordable housing
- Articulate station area and TOD planning principles for consideration and integration with the Town's concurrent Future Land Use planning process
- Develop an implementation plan to undertake more detailed transit and TOD-supportive plans in the individual station areas and the corridor as a whole

This memo documents two tasks in the project: developing a TOD place typology specific to Chapel Hill and assessing TOD readiness in the context of this typology and local conditions. These terms are defined in the next section.

TOD Framework

This document begins with a short "cheat sheet" on TOD, providing a brief description of its guiding principles, potential benefits, and some illustrative examples in different contexts.

Next, the **TOD Place Typology** is described, including the five typology categories that were developed for the NSBRT study area. The development of the typology was grounded on an examination of the existing character of the station areas, as well as review of plans, strategies, and conversations with stakeholders about the anticipated future of these locations. The typology thus represents current conditions as well as the aspirational future character of the stations. Some basic metrics in terms of ridership, service, activity, multimodality, and land use are provided, along with benchmarks against which to gauge future performance--or assess where future station areas on other alignments may fit into this framework.

Having established the typology, we can then assess **TOD Readiness**--how far along each station has advanced toward achieving the type of TOD envisioned in its typology category. Each station is assigned an overall numerical Readiness Score and a categorical Readiness Rating. These are based on a quantitative and qualitative analysis of local conditions across four key readiness dimensions: connectivity, market strength, development opportunity, and government support. Descriptions of the metrics and scoring methodology are provided.

Together, the TOD Typology and TOD Readiness form the **TOD Framework** which will help to guide future decision-making in support of TOD in the NSBRT Corridor. The core of the Framework is in a compendium of station profiles with supporting analysis, built on the database that was developed in support of the typology and readiness analyses. These profiles inventory current conditions and provide insight into the opportunities and challenges presented in each station area.

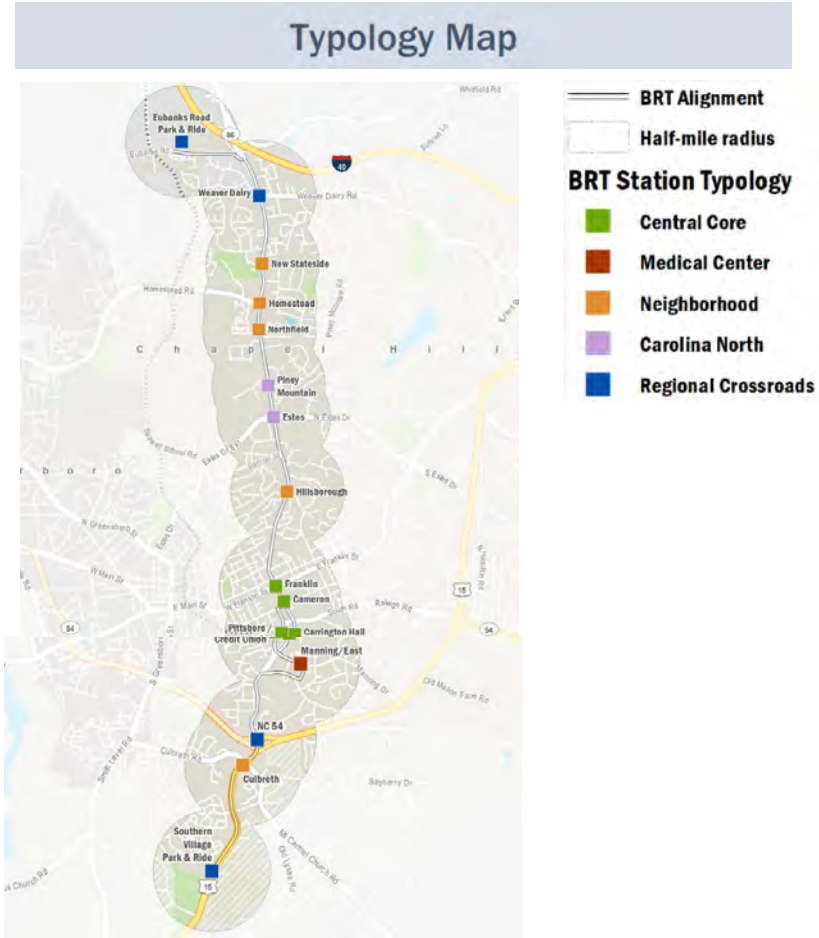
Community Workshops (July 2019)

BRT Design Examples

Study Area Map

NORTH-SOUTH BRT TRANSIT-ORIENTED DEVELOPMENT PLAN 2019

"TOD is a sustainable development pattern focused on compact, walkable development around high-capacity transit that emphasizes attractive urban design, public amenities, and economic opportunity."

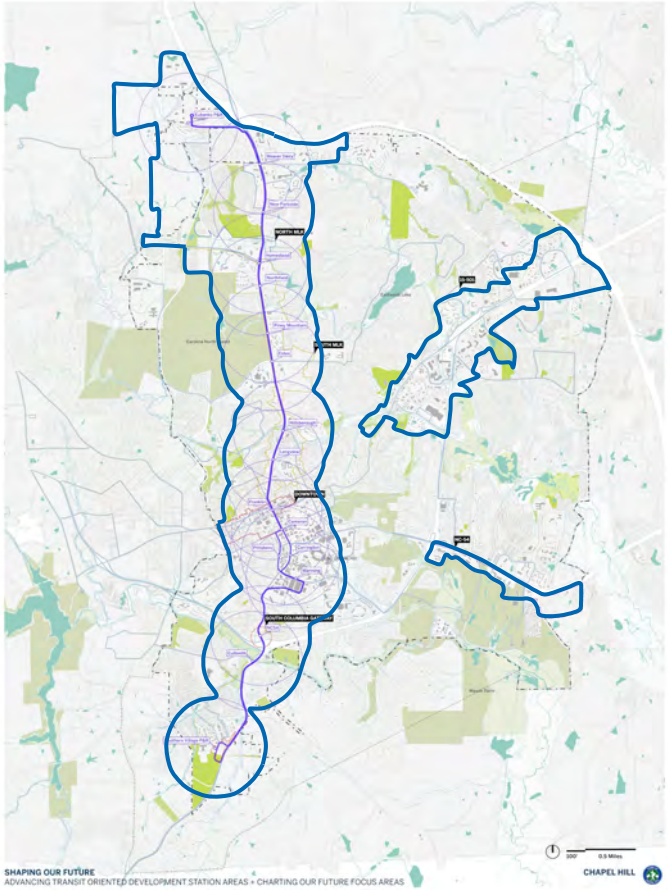


TOD STATION AREAS + FOCUS AREAS

- Almost half of Chapel Hill's population
- Almost half Chapel Hill's housing
- Findings can inform wider planning

	GEOGRAPHY	POPULATION	HOUSING UNITS
CHAPEL HILL	27.5 SQ. MI.	66,146	23,712
STATION AREAS / FOCUS AREAS	9.6 SQ. MI.	32,999	11,482
% OF TOTAL	34.8%	49.9%	48.4%

TOD Station Areas and + UDO Vision Focus Areas



Source: Esri Business Analyst, SB Friedman

Plan Making Foundations

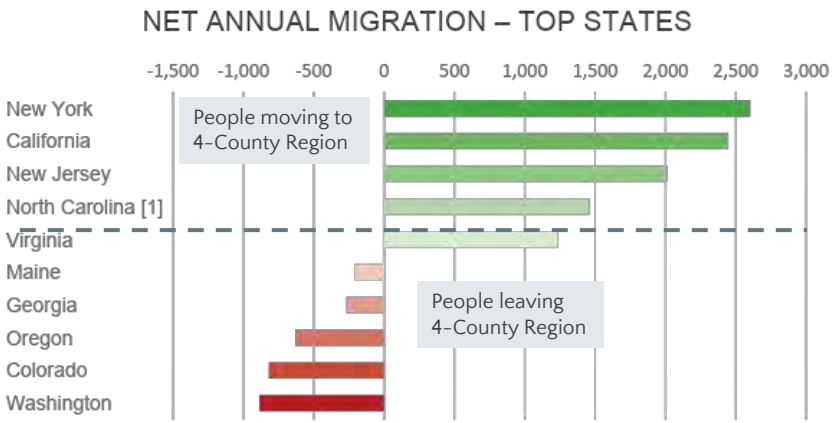
Market forecast and existing pipeline

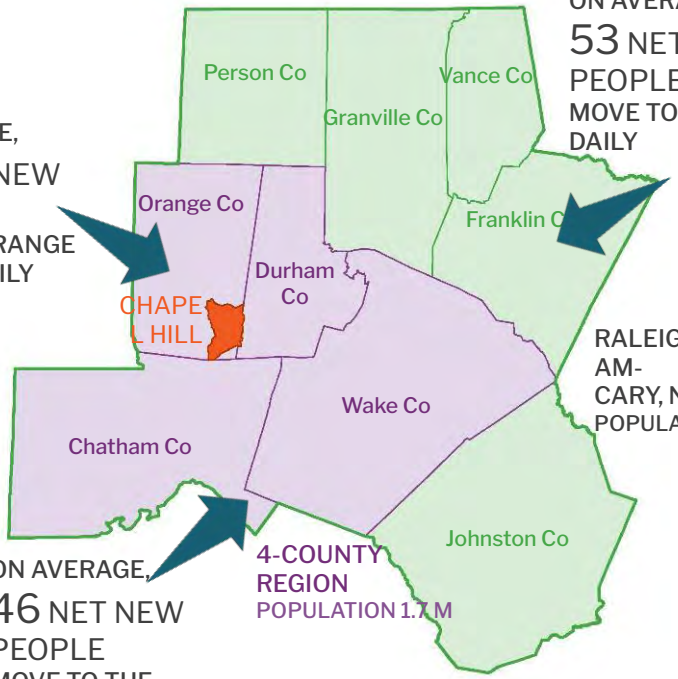
Meeting local needs and aspirations

Focus Area and TOD Station Area Scenarios

A HIGH GROWTH REGION, LOWER GROWTH COUNTY

- Residents arriving from high-cost areas in Northeast and western US





ON AVERAGE, 5.5 NET NEW PEOPLE MOVE TO ORANGE COUNTY DAILY

ON AVERAGE, 53 NET NEW PEOPLE MOVE TO THE CSA DAILY

RALEIGH-DURHAM-CARY, NC CSA [2] POPULATION 2.0 M

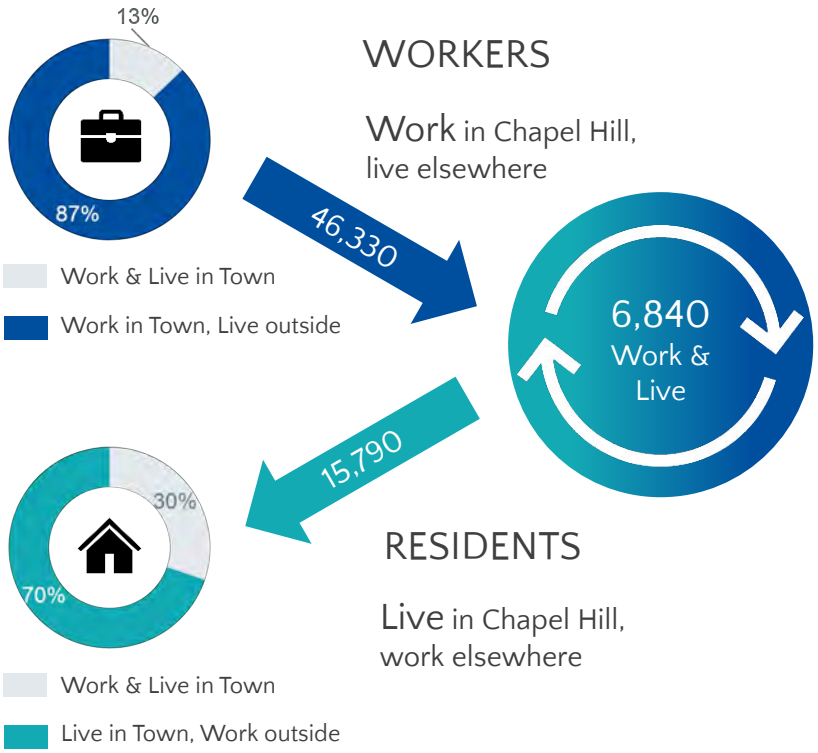
4-COUNTY REGION POPULATION 1.7 M

ON AVERAGE, 46 NET NEW PEOPLE MOVE TO THE 4-COUNTY REGION DAILY

[1] Net moves between the 4-County region and the rest of the state.
[2] The Raleigh-Durham-Cary, NC Combined Statistical Area consists of the following counties: Chatham, Durham, Franklin, Granville, Johnston, Orange, Person, Vance, and Wake.
Source: ACS 2019 5-Year Estimates, Esri, SB Friedman

FEW PEOPLE BOTH LIVE AND WORK IN CHAPEL HILL

Town has a high number of jobs to its number of homes



JOBS-HOUSING RATIO IN REGIONAL CITIES WITH MAJOR UNIVERSITY PRESENCE

City	University	Jobs-Housing Ratio
Athens, GA	Georgia	1.23
Durham, NC	Duke	1.42
Winston-Salem, NC	Wake Forest	1.43
Raleigh, NC	NC State	1.81
Chapel Hill, NC	North Carolina	2.24
College Park, MD	Maryland	2.32
Greenville, SC	Clemson	3.38

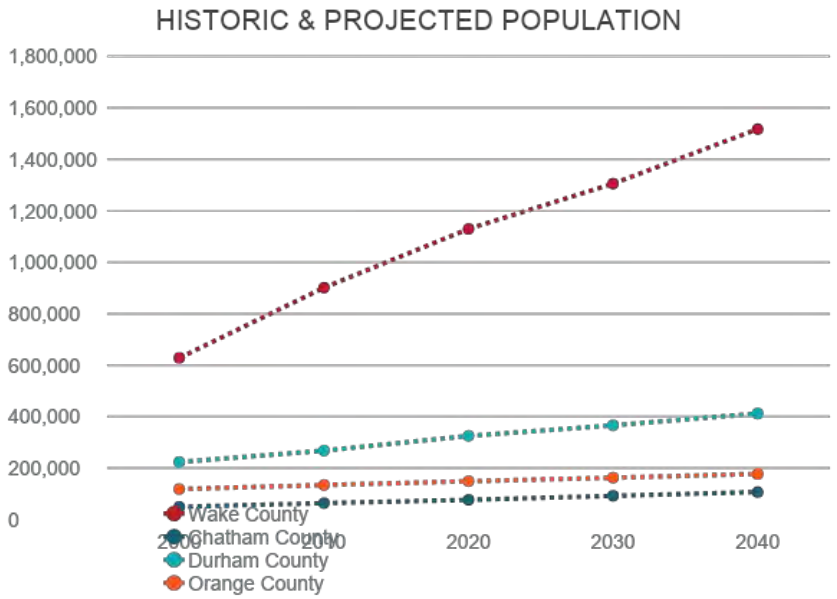
Source: ACS 2019 5-Year Estimates, LEHD, SB Friedman

SLOWER TOWN GROWTH RATE THAN WIDER AREA

Chapel Hill Population (2000)	New Residents (2000-2020)	Chapel Hill Population (2020)	Compound Annual Growth
48,710	+13,250	61,960	1.2%

	Historical 2000-2020 CAGR	Projected 2020-2040 CAGR
Chapel Hill	1.2%	1.0%
4-County Region	2.5%	1.4%
Raleigh-Durham-Cary, NC CSA	2.4%	1.4%

- 2000 – 2020: Chapel Hill captured 2.0% of regional growth
- 2020 - 2040: Chapel Hill projected 2.7% growth capture

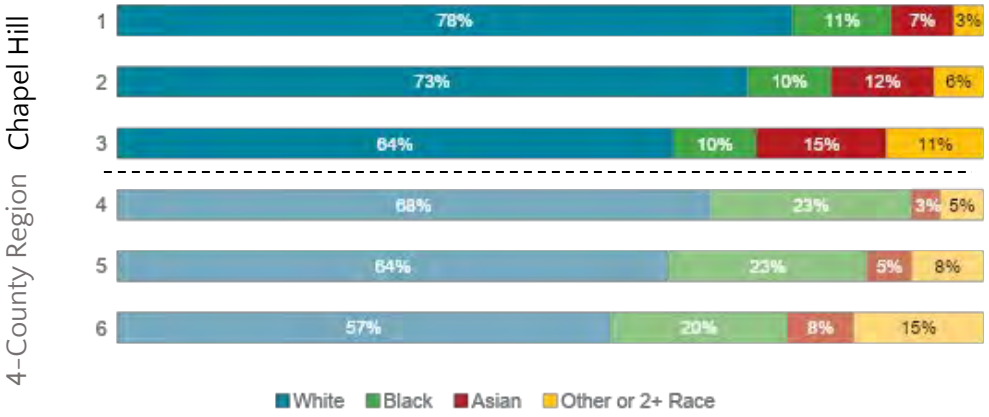


Source: Decennial Census, North Carolina Office of State Budget and Management (NC OSBM)

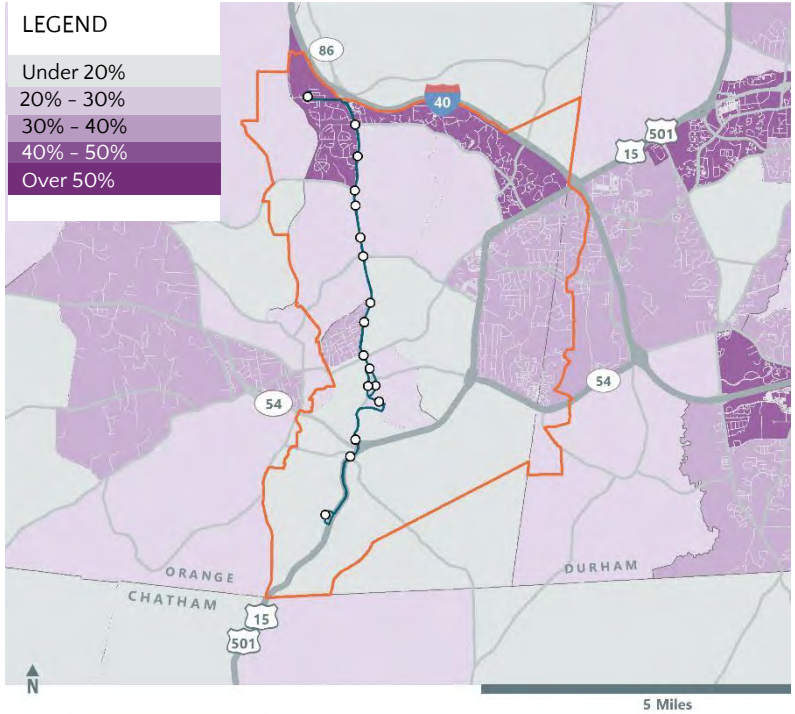
SHIFTING RACIAL + ETHNIC COMPOSITION

Chapel Hill becoming more diverse, but still less diverse than Region

AREA RACIAL & ETHNIC COMPOSITION



NON-WHITE AS A PERCENT OF TOTAL POPULATION



Source: Esri, Decennial Census

SB Friedman Development Advisors

36% of HOUSEHOLDS COST BURDENED

Growing demand + few protected affordable units challenge affordability

RENTER HOUSEHOLDS

58%

Renter Households Cost-Burdened

HOUSEHOLDS EARNING <$35K

89%

Households Cost-Burdened

OWNER HOUSEHOLDS

19%

Owner Households Cost-Burdened

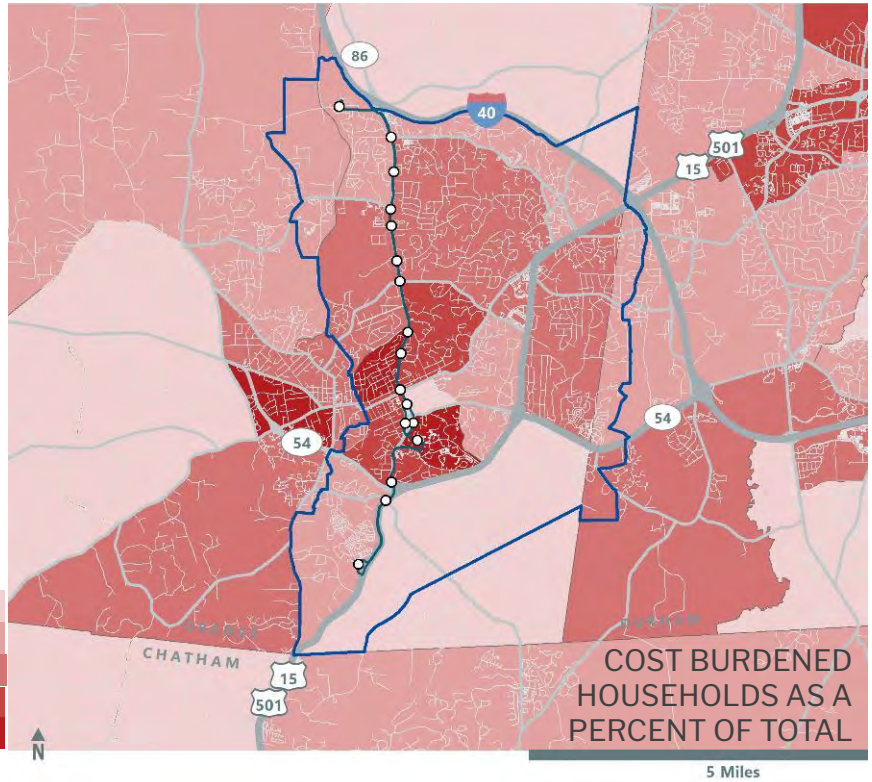
HOUSEHOLDS EARNING $35K+

20%

Households Cost-Burdened

LEGEND

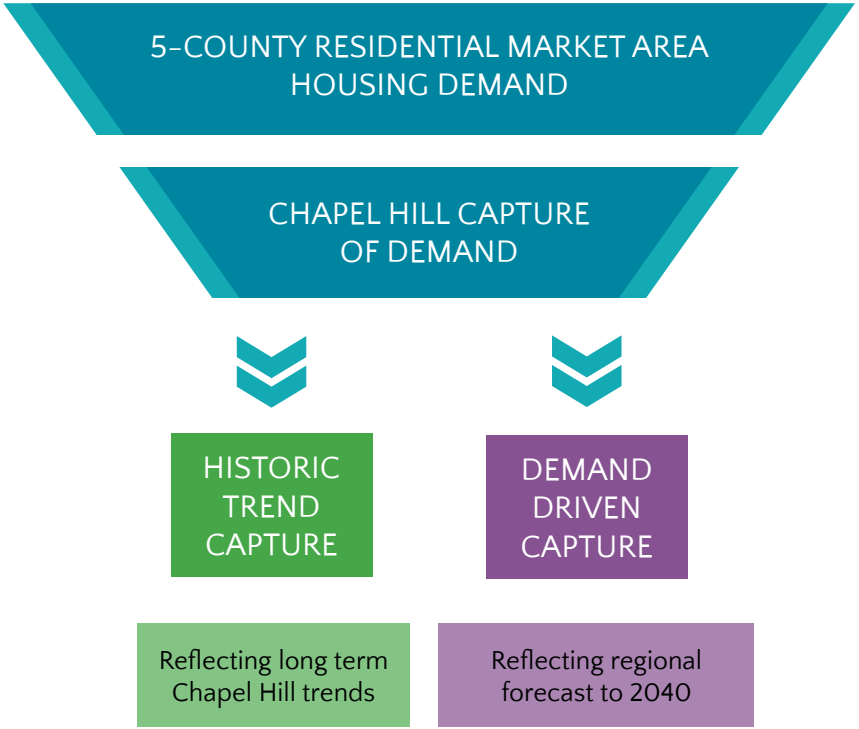
- Under 20%
- 20% - 30%
- 30% - 40%
- 40% - 50%
- Over 50%



Source: ACS 2020 5-Year Estimates, Esri, SB Friedman

CHAPEL HILL CAPTURE OF REGIONAL HOUSING DEMAND TO 2040

Chapel Hill can capture an increased share of regional demand



Strategies to enhance local capture of regional housing demand:

- Market response through higher pipeline project outputs
- TOD and Focus Area opportunities
- Proactive affordable housing production
- Streamlined entitlement process
- Use of public sector land

DRAFT

CHAPEL HILL NET HOUSING DEMAND

Two scenarios: capturing between 6,400 and 8,900 new housing units by 2040

HISTORIC TREND CAPTURE

6,410 total units by 2040
320 units annually

910 Single Family, Detached	1,710 Multifamily, 2–19 Units
310 Single Family, Attached	3,480 Multifamily, 20+ Units

DEMAND DRIVEN CAPTURE

8,910 total units by 2040
446 units annually

1,140 Single Family, Detached	2,250 Multifamily, 2–19 Units
530 Single Family, Attached	4,990 Multifamily, 20+ Units

CHAPEL HILL CAPTURE OF HOUSING DEMAND

Potential Capture: 6,400 and 8,900 units by 2040

HISTORIC TREND CAPTURE		DEMAND DRIVEN CAPTURE	
910 Single Family, Detached	1,710 Multifamily, 2-19 Units	1,140 Single Family, Detached	2,250 Multifamily, 2-19 Units
310 Single Family, Attached	3,480 Multifamily, 20+ Units	530 Single Family, Attached	4,990 Multifamily, 20+ Units
6,410 total units by 2040 320 units annually		8,910 total units by 2040 446 units annually	

DRAFT

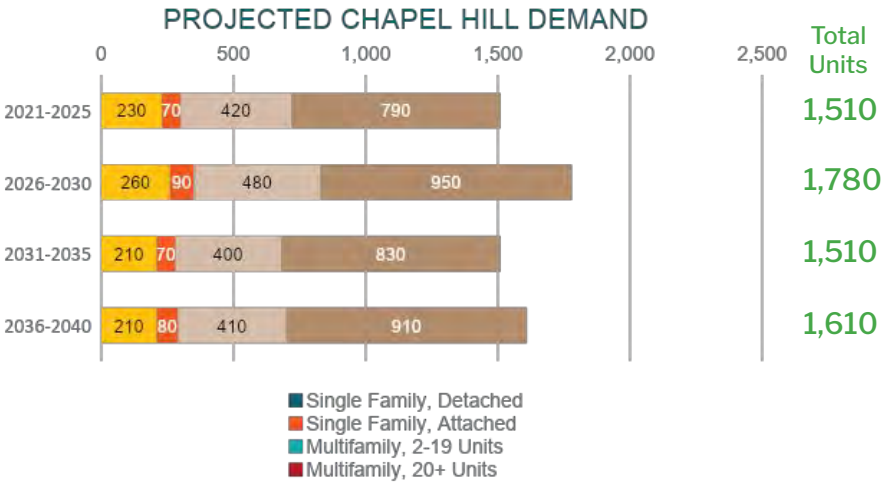
AFFORDABLE	WORKFORCE & MID-RANGE MARKET RATE	HIGHER-PRICE MARKET RATE
(<60% AMI)	(60-120% AMI)	(120%+ AMI)
25%	29%	47%

CHAPEL HILL NET HOUSING DEMAND

Two scenarios: requiring production of 320-446 housing units annually

HISTORIC TREND CAPTURE

6,410 total units by 2040
320 units annually



DEMAND DRIVEN CAPTURE

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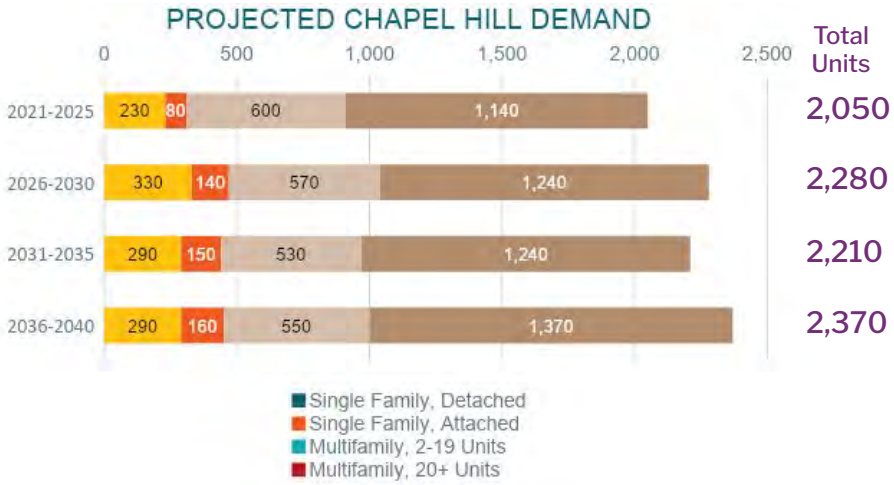
446 units annually



CHAPEL HILL CAPTURE OF REGIONAL HOUSING DEMAND

Implications

HISTORIC TREND CAPTURE

- Decreased share of regional population
- More constrained housing supply
- Higher prices likely
- Increased competition for lower cost housing between long term residents and students

DEMAND DRIVEN CAPTURE

- More diverse housing opportunities for local residents
- More housing opportunities for local workforce
- Reduced price pressure
- Decreased commute times
- Support for transit investment
- High quality places: TOD density supports viability of resident services and quality public realm
- Meeting the Town's Guiding Principles (FLUM)

CHAPEL HILL NET ENTITLED PIPELINE

The Town has 3,498 net entitled residential units in the pipeline

- A Chapel Hill residential project takes **3-4 years from entitlement to completion** on average.
- **(84%) are built within five years.**
- **Projection: 3,125 entitled units will be built in the next five years.**

CHAPEL HILL NET UNITS IN PIPELINE

	SF, Detached	SF, Attached	MF, 2-19	MF, 20+	Total
Entitled	9	90	12	657	768
Final Review	-	54	54	1,332	1,440
Construction	85	70	82	1,053	1,290
Total in Pipeline	94	214	148	3,042	3,498
	DEVELOPMENT UNCERTAINTY FACTOR		DEVELOPMENT UNCERTAINTY FACTOR		
SBF Pipeline Projection	**88**	**192**	**133**	**2,712**	**3,125**

*Of the 2,262 net residential units entitled 2013-2017, 1,896 units **(84%) were built within five years.**

[1] For the purpose of this analysis, SB Friedman did not evaluate projects in the Concept Plan stage or those currently under review.
Source: SB Friedman, Town of Chapel Hill

CHAPEL HILL PIPELINE RECONCILIATION

Additional development will need to be entitled to meet future housing demand

HISTORIC TREND CAPTURE

	SF, Detached	SF, Attached	MF, 2-19	MF, 20+	Total
2021-2025	230	70	420	790	1,510
2026-2030	260	90	480	950	1,780
2031-2035	210	70	400	830	1,510
2046-2040	210	80	410	910	1,610
Net Demand	910	310	1,710	3,480	6,410
SBF Pipeline Projection	88	192	133	2,712	3,125
Demand Net of Pipeline	822	118	1,577	768	3,285

3,285
Balance

DEMAND DRIVEN CAPTURE

	SF, Detached	SF, Attached	MF, 2-19	MF, 20+	Total
2021-2025	230	80	600	1,140	2,050
2026-2030	330	140	570	1,240	2,280
2031-2035	290	150	530	1,240	2,210
2046-2040	290	160	550	1,370	2,370
Net Demand	1,140	530	2,250	4,990	8,910
SBF Pipeline Projection	88	192	133	2,712	3,125
Demand Net of Pipeline	1,052	338	2,117	2,278	5,785

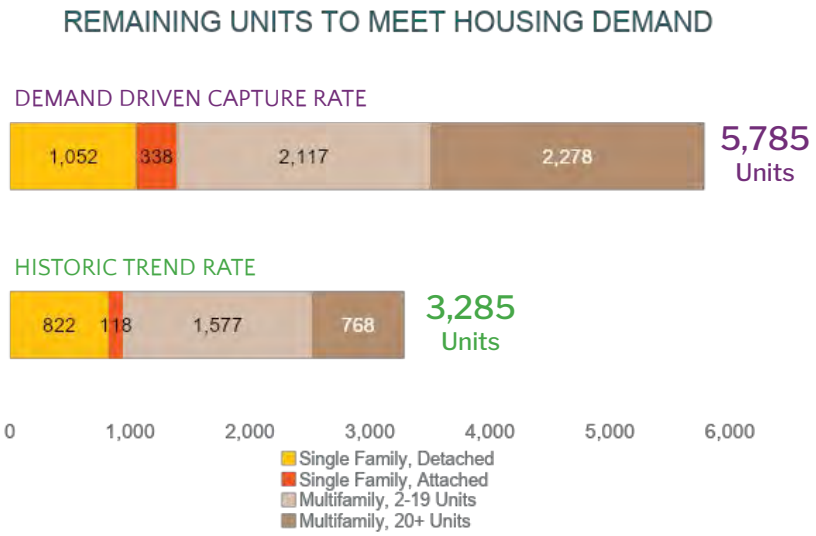
5,785
Balance

Source: SB Friedman, Town of Chapel Hill
SB Friedman Development Advisors

HOUSING DEMAND THROUGH 2040 – BEYOND PIPELINE

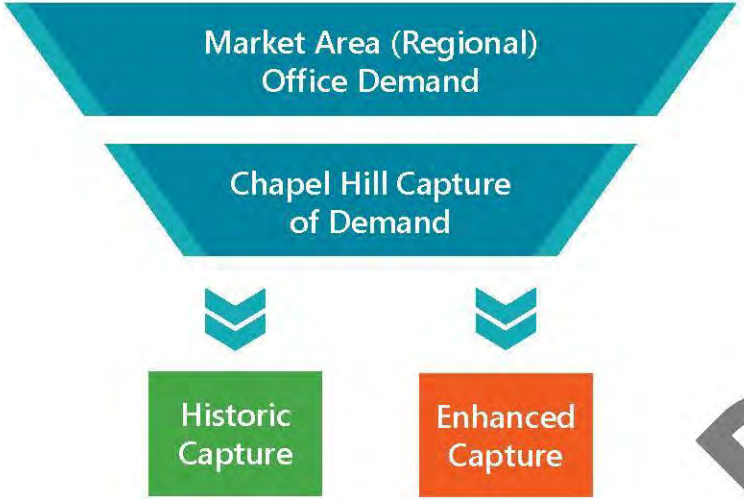
There is robust demand for housing beyond the entitled pipeline

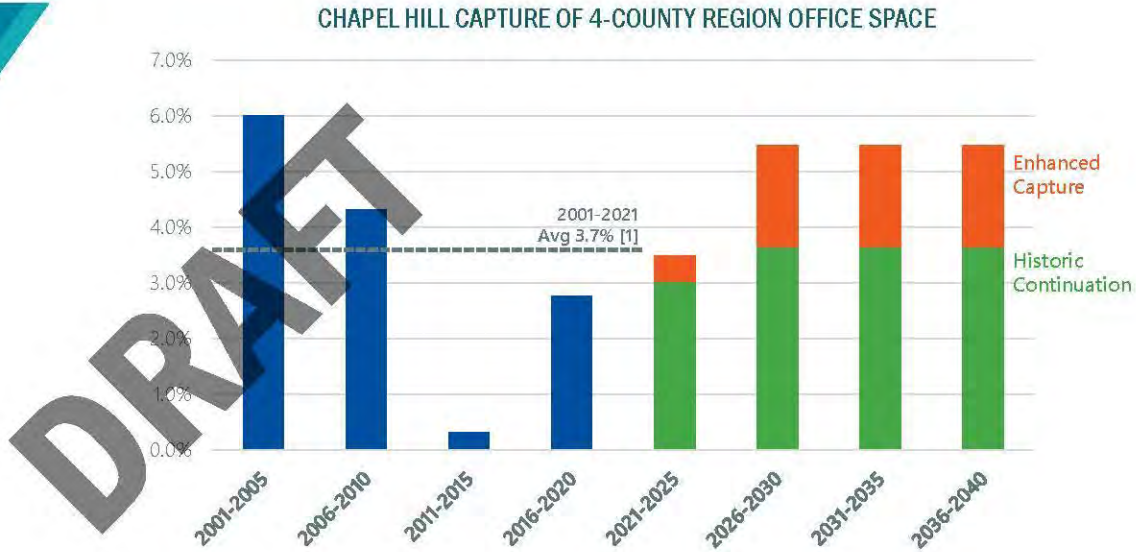
- Projects beyond the entitled pipeline will be needed to meet Chapel Hill's demand.



CHAPEL HILL CAPTURE OF OFFICE DEMAND

SB Friedman evaluated office demand under historic & enhanced capture rates





[1] Historic capture rate reflects Chapel Hill's capture of all office space—including smaller projects and owner-occupied space—developed in the 4-County region from 2001-2021. This analysis considers major renovations (i.e., Parkline) as comparable to new development.

Source: CoStar, SB Friedman

CHAPEL HILL CAPTURE OF OFFICE DEMAND

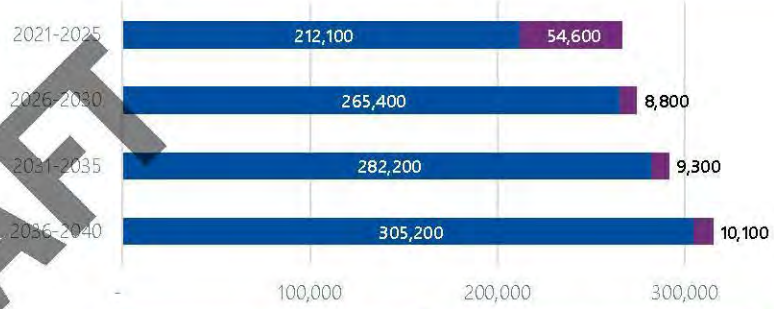
Chapel Hill could capture between 770K and 1.2M SF of new office by 2040

HISTORIC CAPTURE

700-800K SF
Larger-Scale Corporate Office Space by 2040

70-75K SF
Professional Office Space by 2040

ENHANCED CAPTURE



1.0-1.1M SF
Larger-Scale Corporate Office Space by 2040

80-85K SF
Professional Office Space by 2040

DRAFT

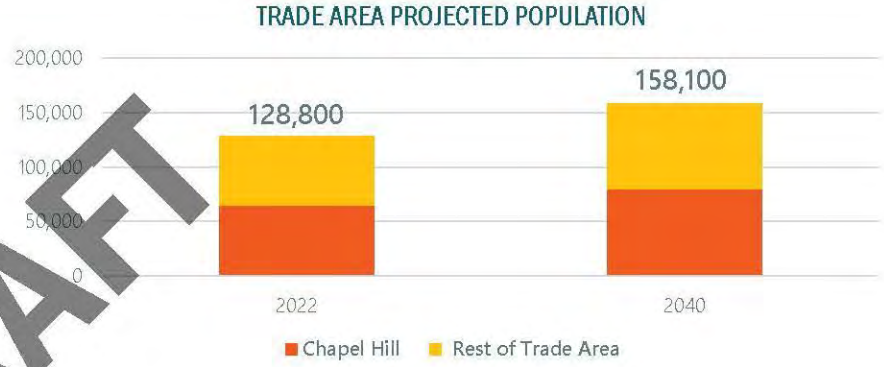
New office space should reflect evolving user preferences:

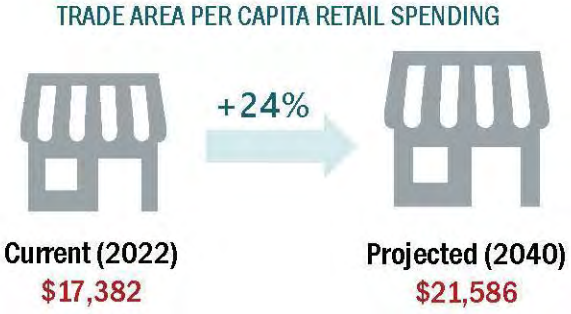
- More flexible layouts, with high-quality building amenities
- Largely positioned in walkable, mixed-use environments

Source: SB Friedman

POPULATION GROWTH & RETAIL SPENDING

Primary Trade Area extends west from Chapel Hill





DRAFT

Source: Business Analyst, ESRI, SB Friedman

SB Friedman Development Advisors

RETAIL TRENDS

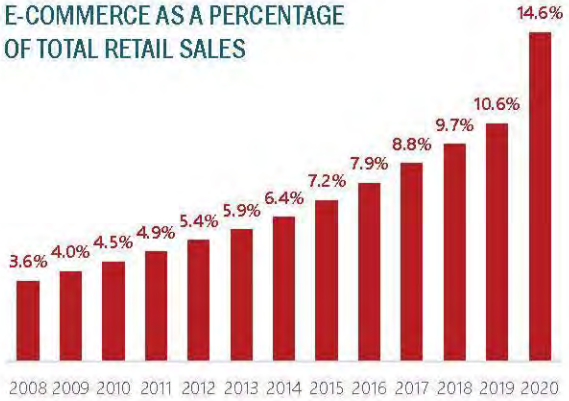
Recent trends are impacting bricks & mortar retail

- Growth of e-commerce is impacting brick & mortar retail development, & was accelerated by the COVID-19 pandemic

- Traditional retailers are repositioning brick & mortar stores to accommodate multi-channel & omni-channel shopping

- Some retail sectors are declining, while others are expanding

DRAFT



SINGLE-CHANNEL
In-store only

MULTI-CHANNEL
Shop in-store or online

OMNI-CHANNEL
Shop online, pick up in-store

DECLINING RETAIL SECTORS

Big box "category killer" retailers

Traditional retailers

EXPANDING RETAIL SECTORS

Value- & convenience-focused retailers

Experiential retailers, food & beverage

Clicks-to-bricks

Source: SB Friedman, US Census Bureau

DEMAND PROJECTIONS

Chapel Hill could support an additional ±660K SF of retail space by 2040

Retail Category	Trade Area Demand Change 2022-2040	Trade Area Demand Potential (2040)	Typical Sales PSF (2040)	Chapel Hill Capture of Demand	Chapel Hill Supportable SF
Furniture and home furnishings stores	2022 2040	$96M	$320	25%	75,000
Electronics and appliance stores	*2040 Demand Lower Than Current Demand	$7M	$1,120	66%	4,000
Building materials and garden equipment and supplies stores		$168M	$510	10%	33,000
Health and personal care stores		$39M	$930	66%	28,000
Clothing and clothing accessories stores	*2040 Demand Lower Than Current Demand	$18M	$490	50%	18,000
General Merchandise Stores		$262M	$340	25%	192,000
Miscellaneous Store Retailers		$38M	$500	50%	38,000
Food Services & Drinking Places		$136M	$670	66%	134,000
Total Occupied Retail SF					522,000 SF
Non-Retail SF % (Services, Medical & Professional Office, etc.)					*15.0%*
Total Occupied SF					614,000 SF
Vacancy Rate					*7.0%*
Total Supportable SF					660,000 SF

Source: Business Analyst, SB Friedman

DRAFT

Plan Making Foundations

Market forecast and existing pipeline

Meeting local needs and aspirations

Focus Area and TOD Station Area Scenarios

WHAT IS TRANSIT-ORIENTED DEVELOPMENT (TOD)?

STRONGER MOBILITY

ATLANTA BELTLINE

DIAMOND VIRGINIA BRT

SEATTLE

THE SILVER LINE, GRAND RAPIDS, MI

INDIANAPOLIS CULTURAL TRAIL

DALLAS RAPID TRANSIT

METRO C LINE, TWIN CITIES, MN

WHAT IS TRANSIT-ORIENTED DEVELOPMENT (TOD)?

GUIDED GROWTH AND DEVELOPMENT

SHORT NORTH, COLUMBUS, OHIO

AUSTIN, TEXAS

CITY GARDENS, CHICAGO, IL

DISCOVERY SQUARE ROCHESTER

EDDY STREET COMMONS, SOUTH BEND, IN

SEATTLE, WA

WHAT IS TRANSIT-ORIENTED DEVELOPMENT (TOD)?

BETTER STREETS AND PUBLIC SPACES

H STREET, WASHINGTON DC

ARDMORE, PHILADELPHIA

ROCKVILLE, MARYLAND

DETROIT

CHURCH STREET, BURLINGTON, VERMONT

YORK, PENNSYLVANIA

PITTSBURGH

WHAT IS TRANSIT-ORIENTED DEVELOPMENT (TOD)?

SUSTAINABLE PLACES

HOUSTON, TEXAS

RENTON, WASHINGTON

TANNER SPRINGS, PARK PORTLAND

CUMBERLAND PARK, NASHVILLE

NYC STORMWATER MANAGEMENT

NAPA COUNTY, GREEN PAVING

DORCHESTER HOUSING, CHICAGO

WHAT IS TRANSIT-ORIENTED DEVELOPMENT (TOD)?

EQUITY

UNI PROJECT, NEW YORK CITY

STATION CENTER TOD, UNION CITY, CA

TAYLOR STREET APARTMENTS AND CHICAGO PUBLIC LIBRARY

KIRKPATRICK

BOOMBOX SMALL BUSINESS POP-UPS, CHICAGO

ROSELAND GRANDFAMILY APARTMENTS, CHICAGO

STATION AREA AND FOCUS AREA OPPORTUNITIES

Diverse housing types

Inclusive housing

Inclusive public realm

Walkable streets

Shared streets

Green landscape

Trees

Sustainable

STATION AREA AND FOCUS AREA OPPORTUNITIES

Mixed-use

Retail

New public spaces

Inclusive public realm

Green spaces

Rich landscape

Walking and biking

Protect natural areas

STATION AREA AND FOCUS AREA OPPORTUNITIES

Critical mass

Mixed-use

Employment, retail

New public spaces

Inclusive public realm

Active transportation

Walking and biking

Transportation Greenways

STATION AREA AND FOCUS AREA OPPORTUNITIES

Mixed-income housing

Community facilities

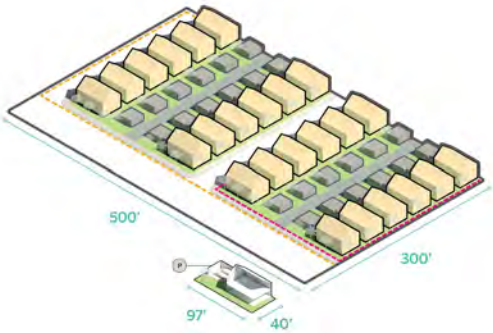
Implementation innovation

Public and private partnerships

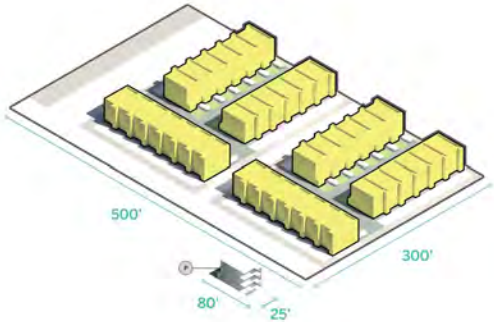
High quality design

TYPES OF DEVELOPMENT THAT CAN MEET NEEDS TO 2040

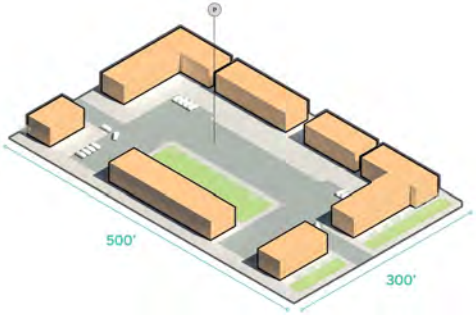
Town Scale Single Family
(12 Net Du/Ac)



Townhomes
(20 Net Du/Ac)



Missing Middle Apartments
(25 Net Du/Ac)



LOCAL EXAMPLES

Town Scale Single Family

Southern Village

Townhomes

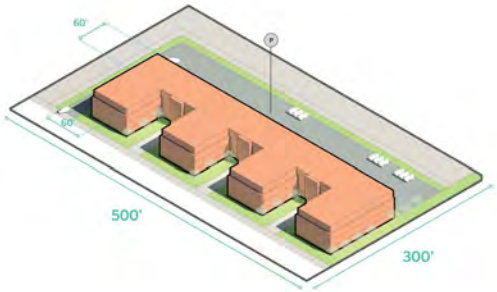
Vineyard Square

Missing Middle Apartments

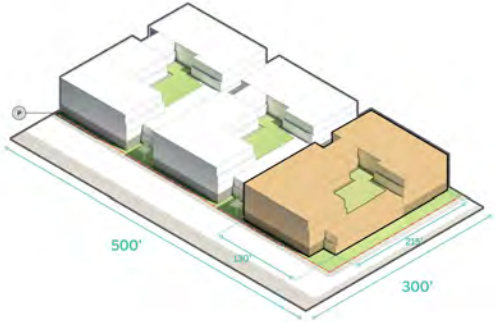
Townside Terrace

TYPES OF DEVELOPMENT THAT CAN MEET NEEDS TO 2040

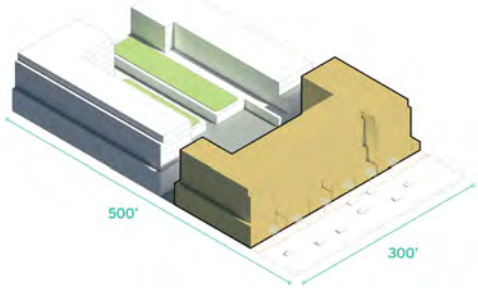
4 Story Apartment (Rear Parking)
(50 Net Du/Ac)



Podium Apartment
(60 Net Du/Ac)



8 Story Apartment Mixed Use
(150 Net Du/Ac)



LOCAL EXAMPLES

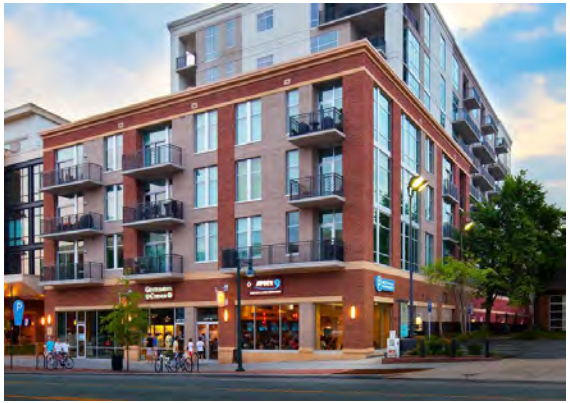
4 Story Apartment (Rear Parking)

Azalea Estates

Podium Apartment

Columbia Street Annex

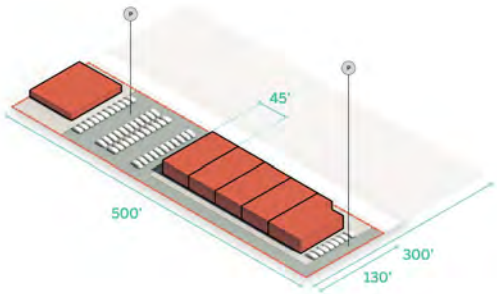
8 Story Apartment Mixed Use



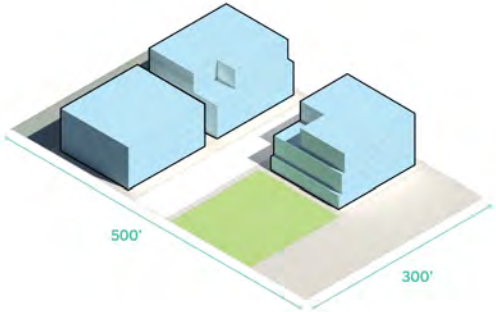
140 West Franklin

TYPES OF DEVELOPMENT THAT CAN MEET NEEDS TO 2040

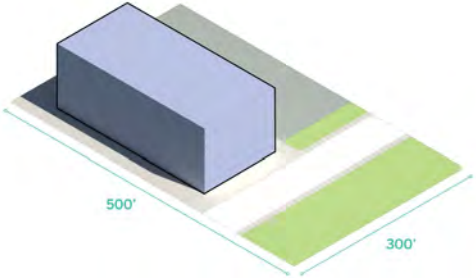
Corridor Retail



4-5 Story Office



7 Story Office



LOCAL EXAMPLES

Corridor Retail

Village Plaza, Blue Hill District

4-5 Story Office

101 Glen Lennox Office

7 Story Office

136 E Rosemary (Redevelopment)

FUTURE OPPORTUNITY SITES

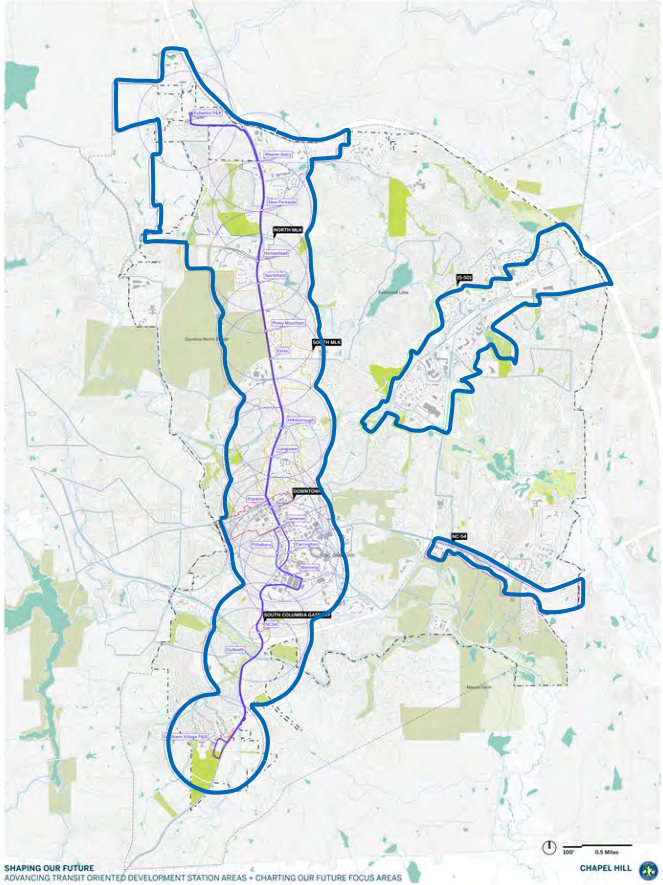
PARKING SITES
Surface parking lots

RETAIL + COMMERCIAL
Aging retail centers
Office: Low density, smaller, aging
Auto service: wash, tire, oil, gas
Attached parking

VACANT LAND
Small scale infill
Strategic land reserves (needing larger upfront investment)

RESIDENTIAL INTENSIFICATION
Surplus lots
ADU potential
Building conversions
Lot subdivision

TOD Station Areas and + UDO Vision Focus Areas



Plan Making Foundations

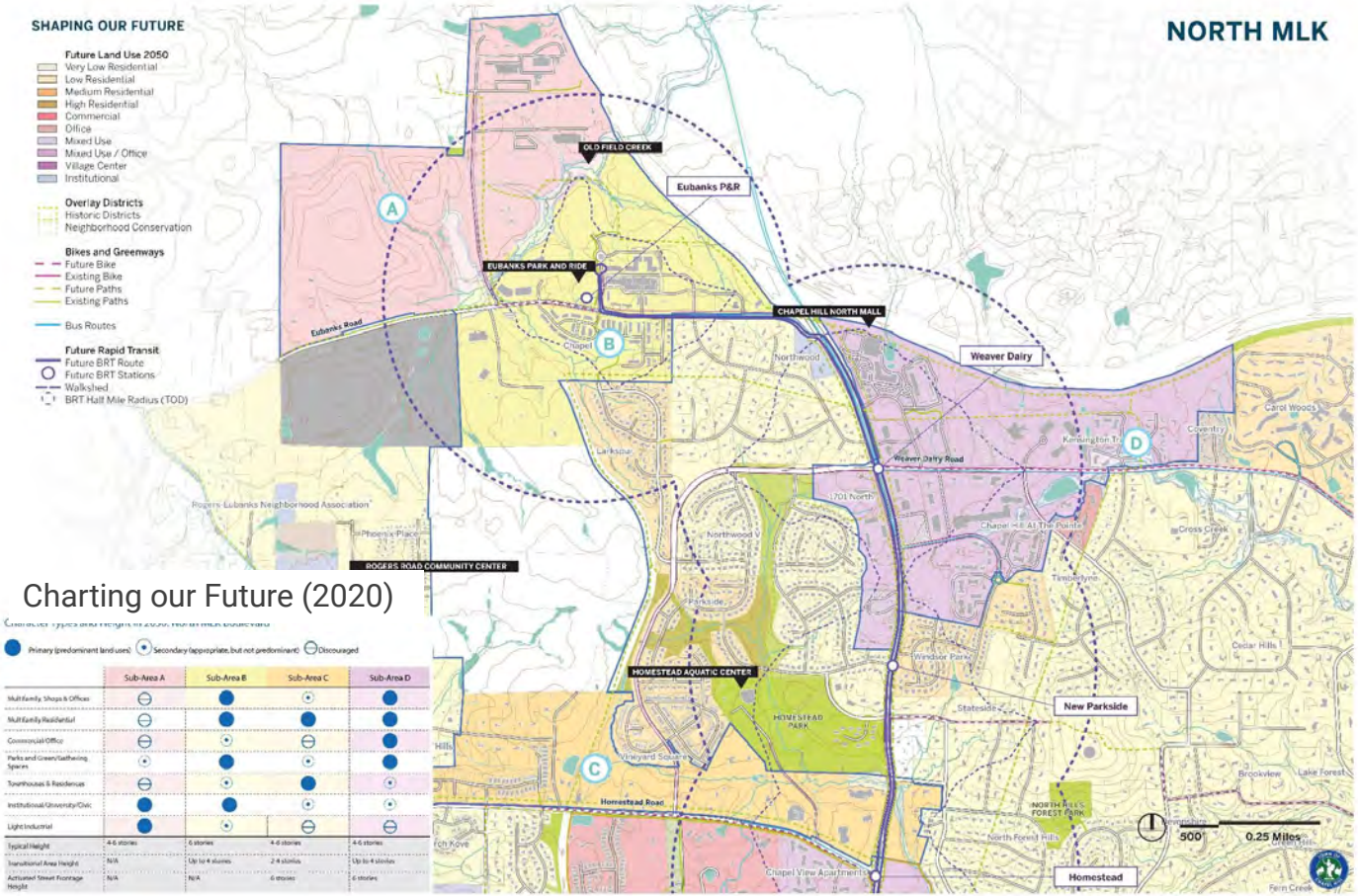
Market forecast and existing pipeline

Development types that can meet local needs

Focus Area and TOD Station Area Scenarios

MLK North

MLK NORTH: RECENT PLANS AND PROPOSALS



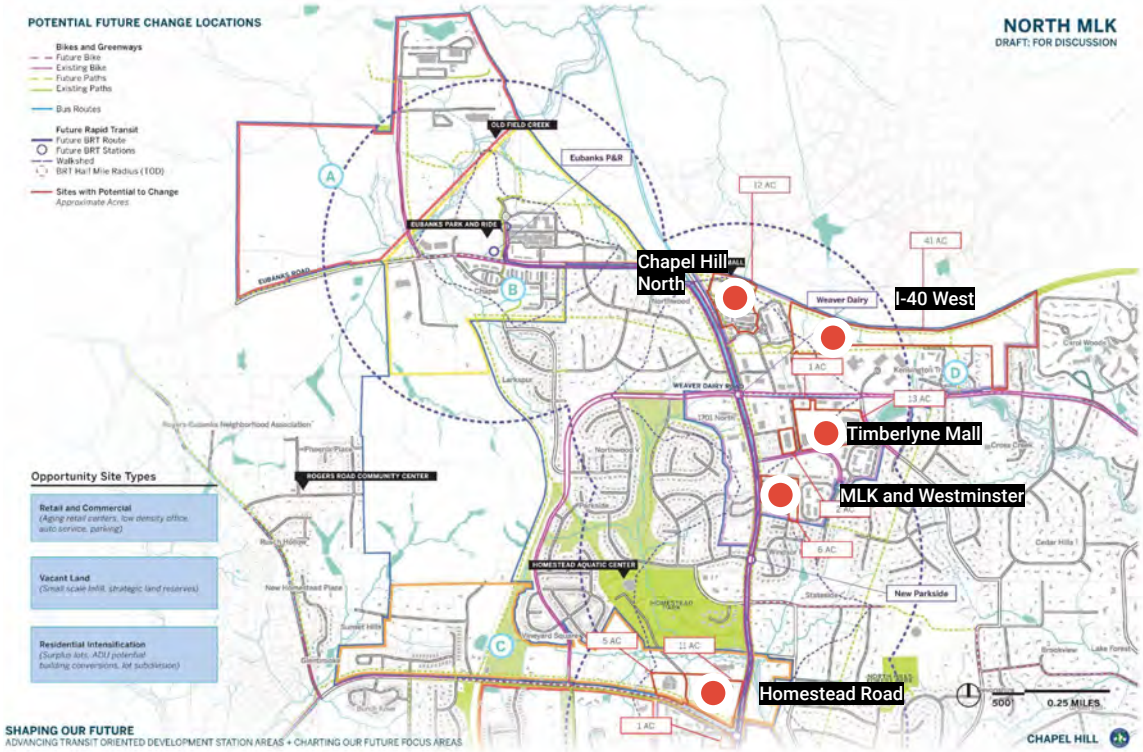
Charting our Future (2020)

Primary (predominant land uses) Secondary (appropriate, but not predominant) Discouraged

	Sub-Area A	Sub-Area B	Sub-Area C	Sub-Area D
Multi-family, Shops & Offices	Secondary	Primary	Secondary	Primary
Multi-family Residential	Secondary	Primary	Primary	Primary
Commercial/Office	Secondary	Secondary	Secondary	Primary
Parks and Green/Gathering Spaces	Secondary	Primary	Secondary	Primary
Townhouses & Residences	Secondary	Secondary	Primary	Secondary
Institutional/University/Civic	Primary	Primary	Secondary	Secondary
Light Industrial	Primary	Secondary	Secondary	Secondary
Typical Height	4-6 stories	6 stories	4-6 stories	4-6 stories
Transitional Area Height	N/A	Up to 4 stories	2-4 stories	Up to 4 stories
Activated Street Frontage Height	N/A	N/A	6 stories	6 stories

- Major north-south arterial
- Gateway to Chapel Hill
- Proposed premium transit corridor
- TOD Opportunity
- Strong development interest
- Proximity to I-40
- Availability of undeveloped land

NORTH MLK FOCUS AREA



Gateway Corridor with Mixed-use Nodes

Fully leverage future bus rapid transit

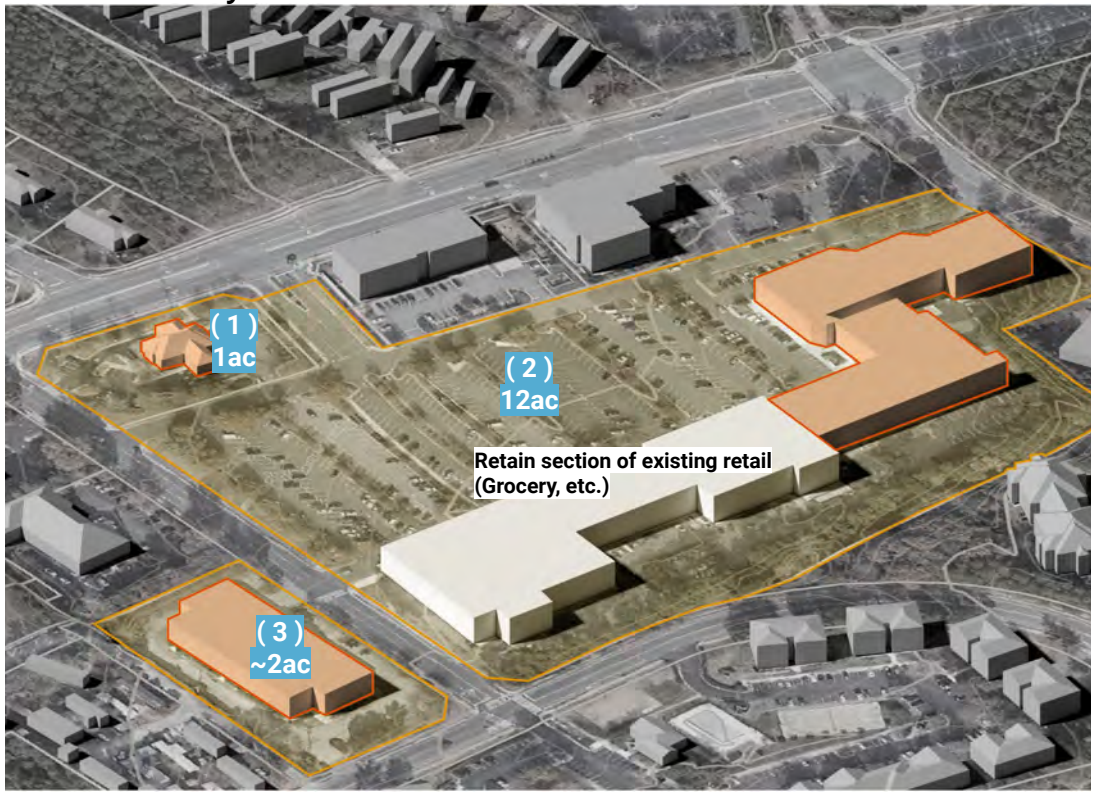
Wide sidewalks, buildings, and tree canopies frame the corridor

East-to-west multimodal connectivity

Create highly functional, walkable destinations

Potential Site: **Timberlyne Mall**

Weaver Dairy BRT TOD



ASSETS

Future Weaver Dairy BRT Station

East-west links

Future bike connections

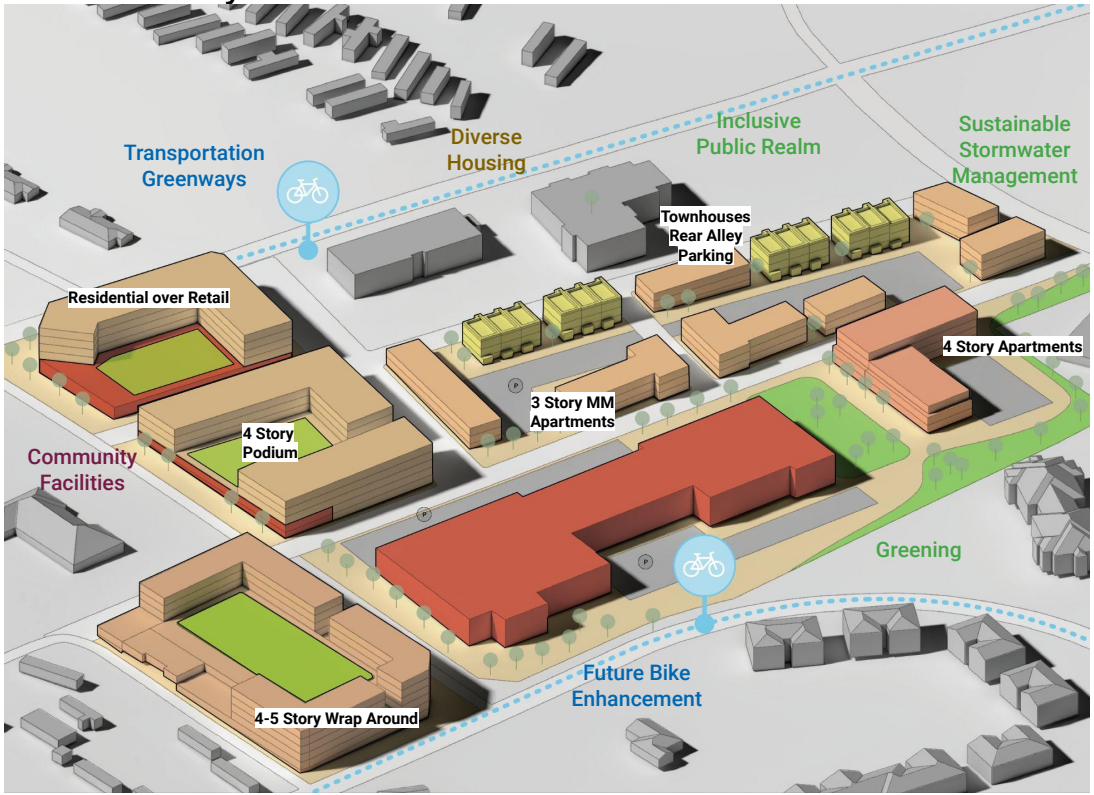
Surface parking area

Future retail consolidation

Existing Uses: Retail Mall and Business
Total Acres: 15ac
Site Factors: existing uses, neighbors, stormwater and topo considerations

Potential Site: Timberlyne Mall

Weaver Dairy BRT TOD

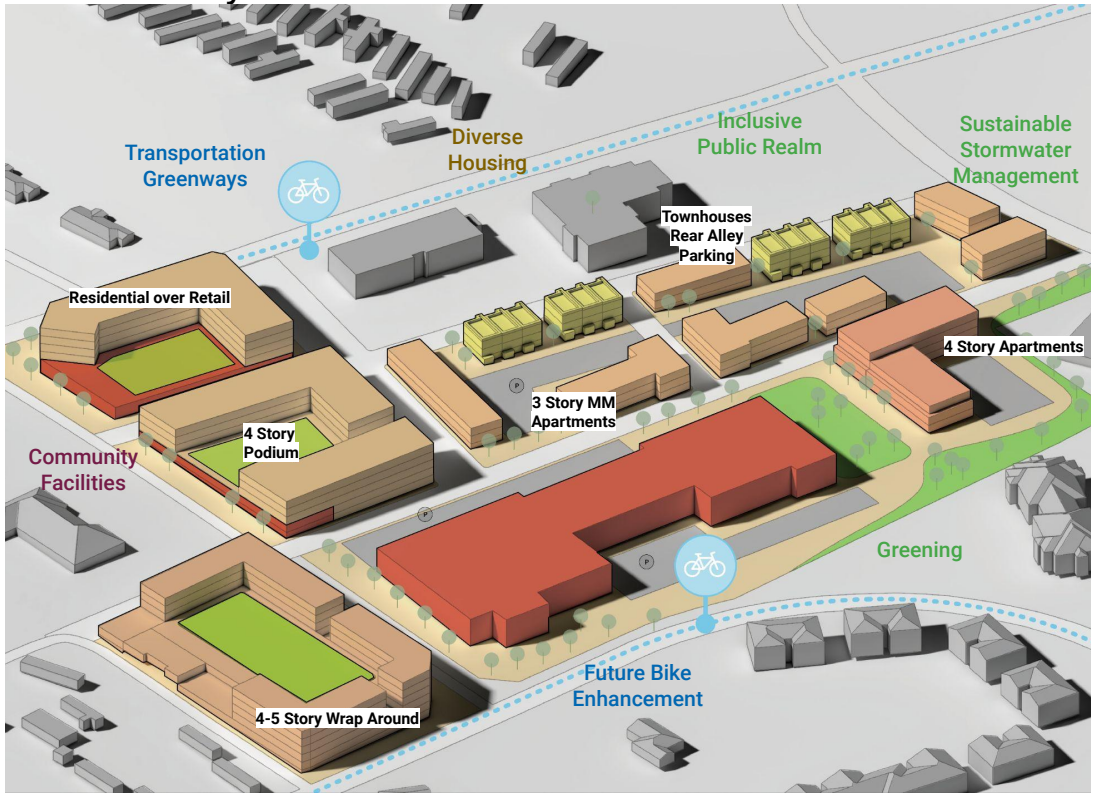


A Sustainable Mixed-Use Community

Potential change by 2040

Potential Site: Timberlyne Mall

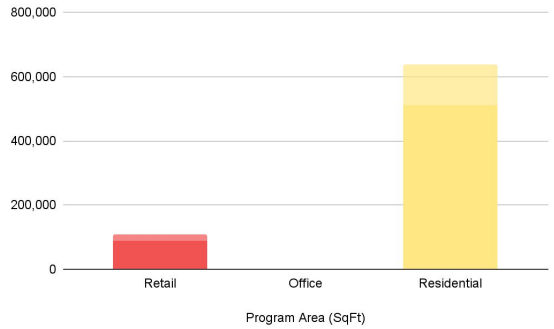
Weaver Dairy BRT TOD



Potential change by 2040

A Sustainable Mixed-Use Community

Use Mix



Residential GFA: 637,000 sq ft

Residential Units: 512

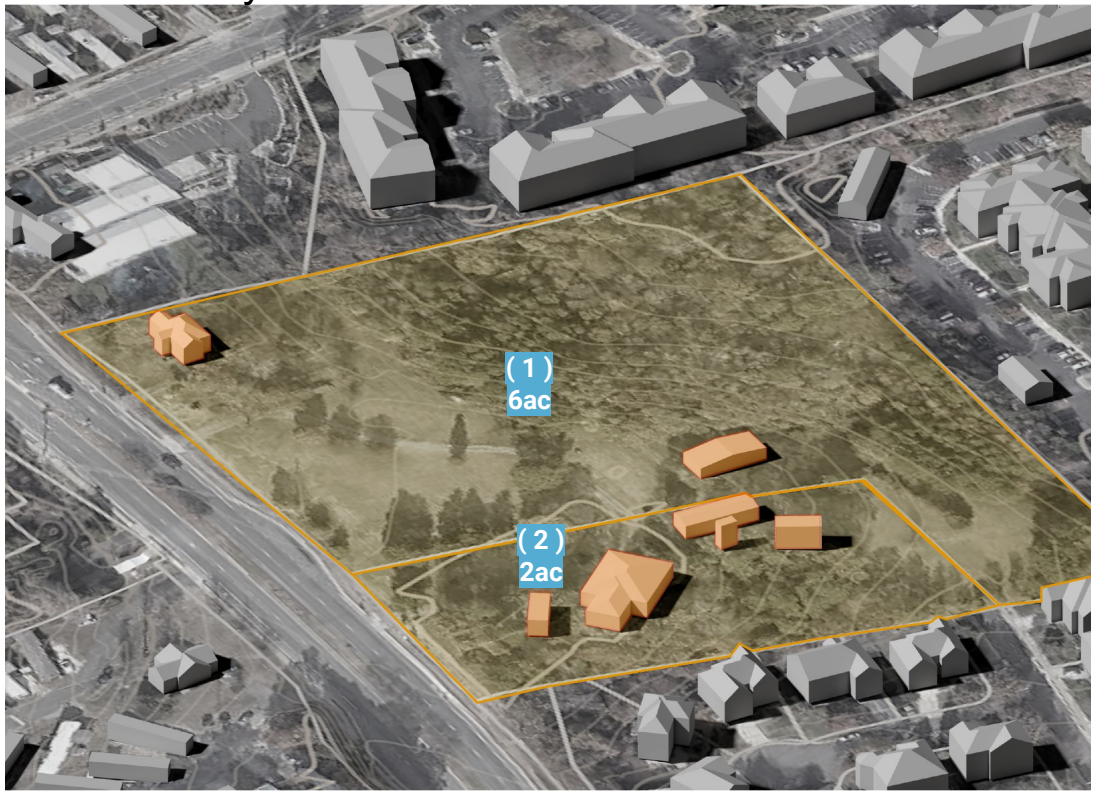
- 250 Apartments
- 250 Missing Middle
- 12 Townhouses
- 0 Higher Density Single Family

Retail GFA: 107,000 sq ft

DU/Acre: 34

Potential Site: **MLK and Westminster Drive**

Weaver Dairy BRT TOD



Potential change by 2040

ASSETS

Future Weaver Dairy BRT Station

Future New Stateside BRT Station

High visibility on MLK

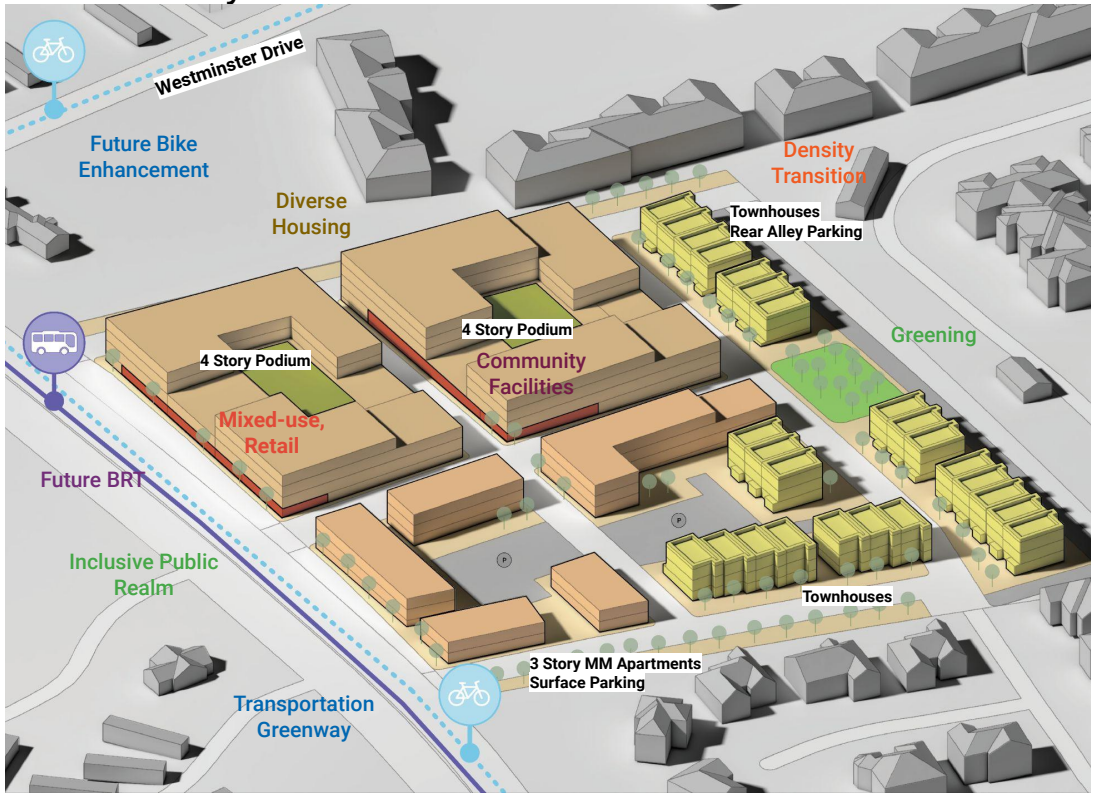
East-west links

Future bike connections

Existing Use: Single Family Residential
Total Acres: 8ac
Factors: Existing homes and owners aspirations

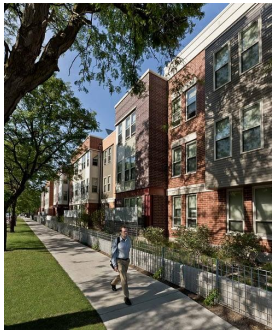
Potential Site: MLK and Westminster Drive

Weaver Dairy / New Stateside BRT TOD



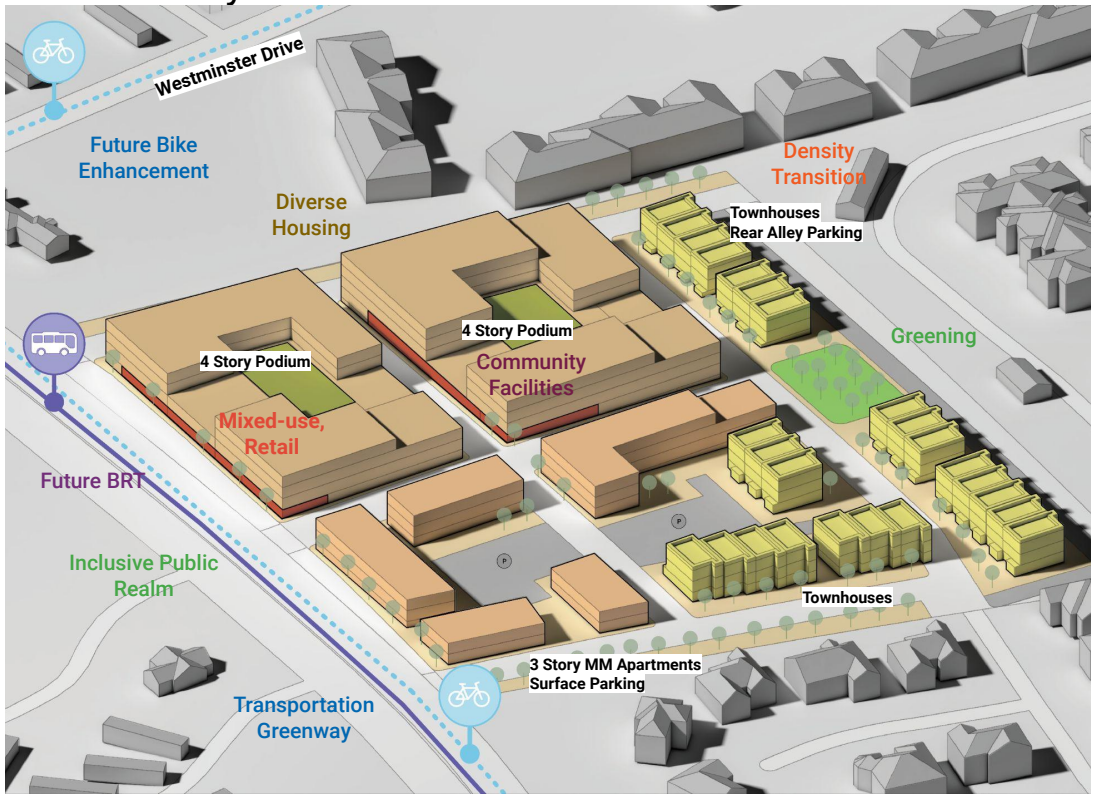
Potential change by 2040

A Transit Oriented Hub



Potential Site: MLK and Westminster Drive

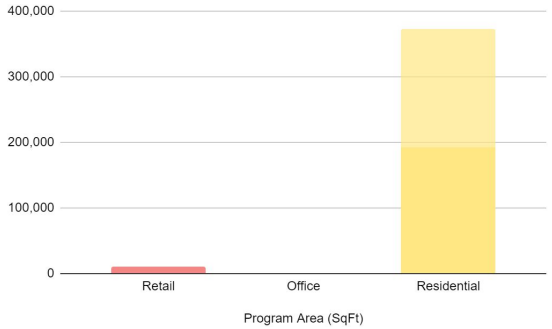
Weaver Dairy / New Stateside BRT TOD



Potential change by 2040

A Transit Oriented Hub

Use Mix



Residential GFA: 370,000 sq ft

Residential Units: 255

- 150 Apartments
- 80 Missing Middle
- 25 Townhouses
- 0 Higher Density Single Family

Retail GFA: 10,000 sq ft

DU/Acre: 31

Potential Site: **Chapel Hill North**

Weaver Dairy BRT TOD

ASSETS

Gateway location

Future Weaver Dairy BRT Station

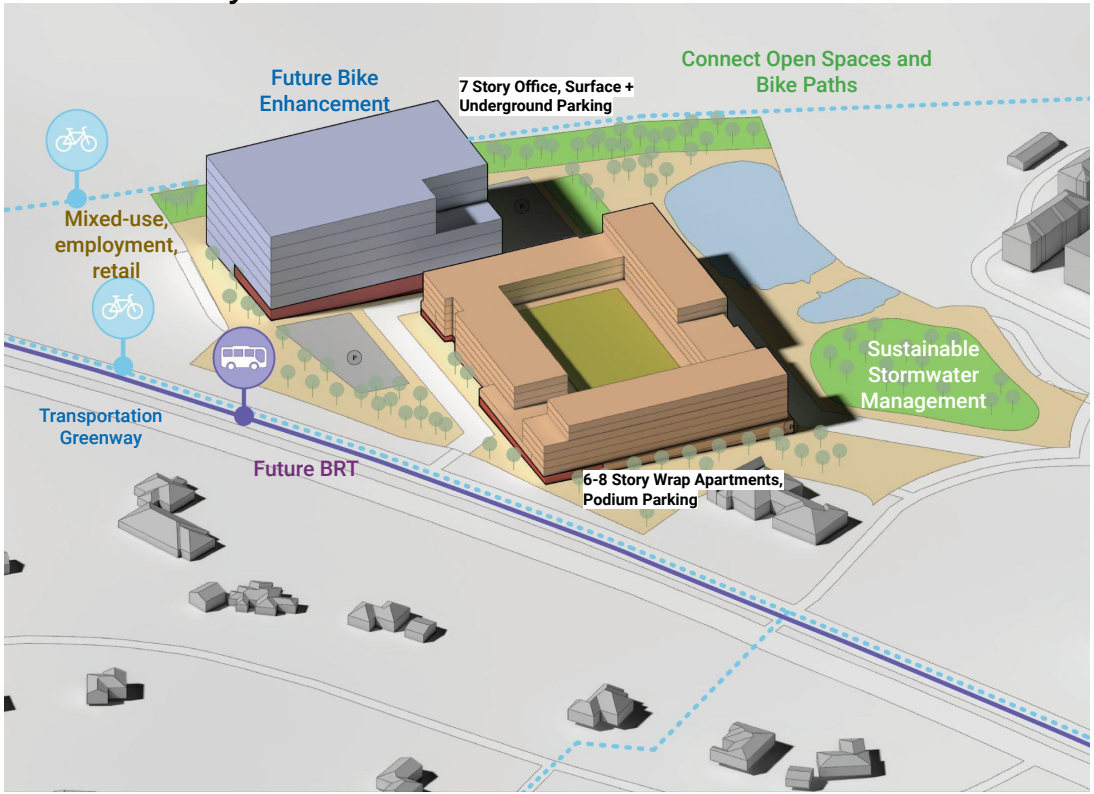
Established destination

Future bike / greenway connections

Existing Uses: Retail Mall
Total Acres: 18ac / ~10ac Developable Approx
Factors: Topo and stormwater feature

Potential Site: **Chapel Hill North**

Weaver Dairy BRT TOD

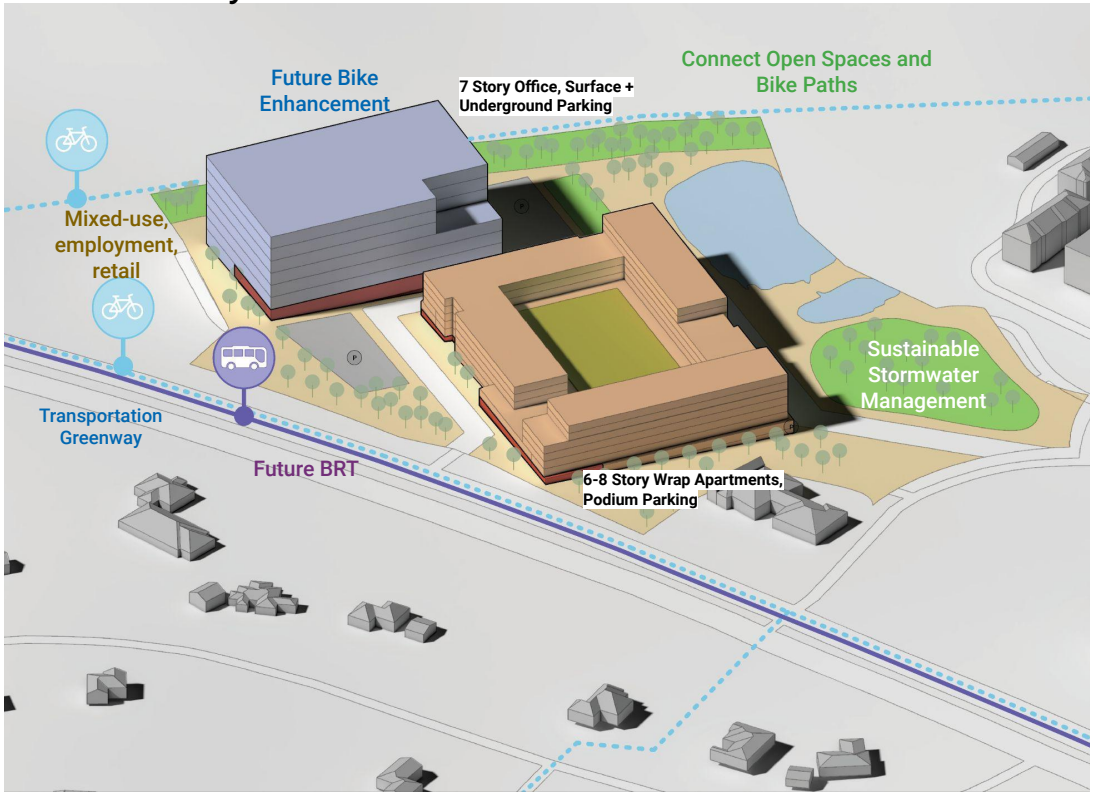


A Gateway Destination

Potential change by 2040

Potential Site: **Chapel Hill North**

Weaver Dairy BRT TOD



Potential change by 2040

A Gateway Destination

Use Mix

Residential GFA: 370,000 sq ft

Residential Units: 300

- **300 Apartments**
- **0 Missing Middle**
- **0 Townhouses**
- **0 Higher Density Single Family**

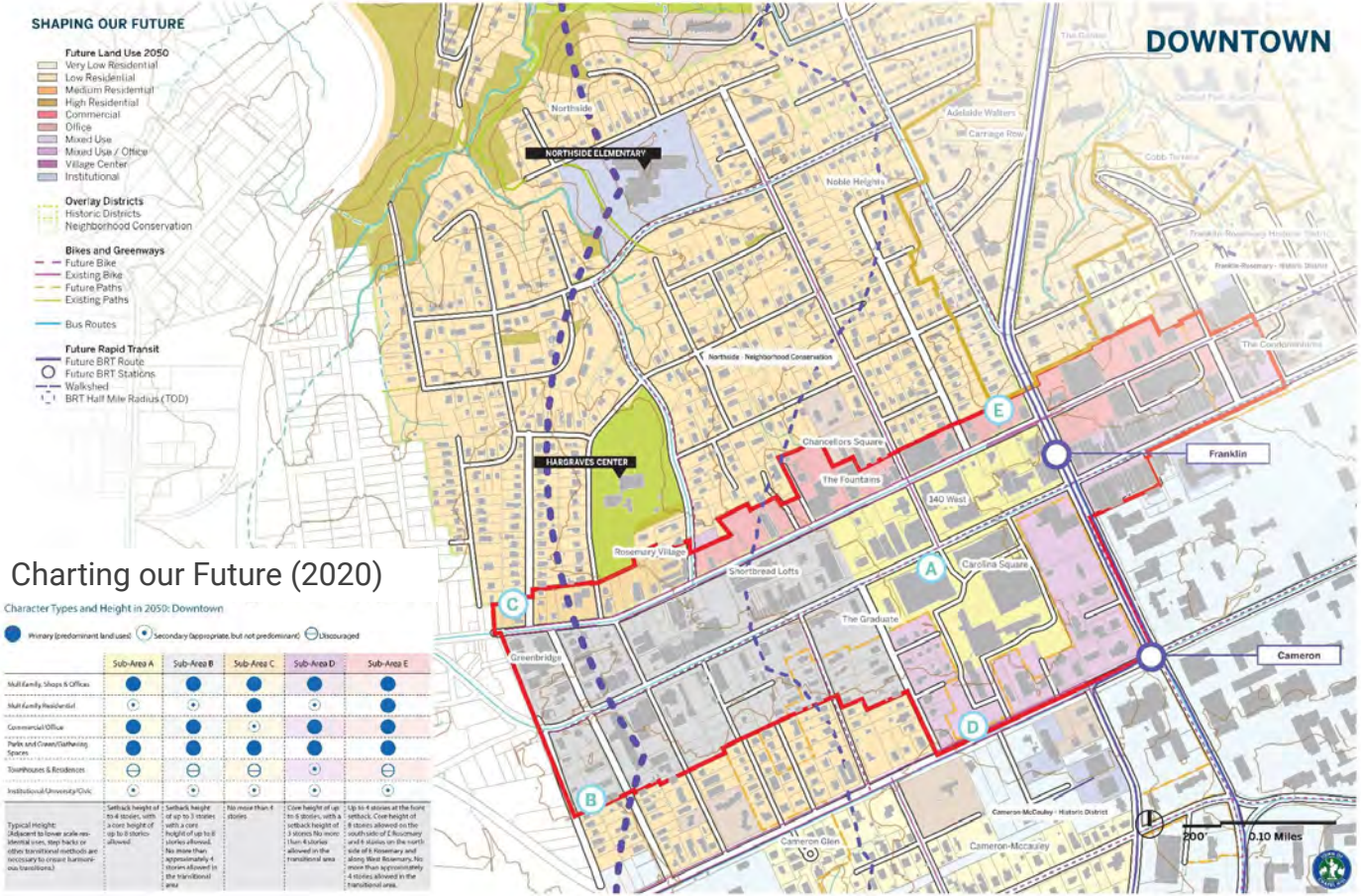
Retail GFA: 50,000 sq ft

Office GFA: 290,000 sq ft

DU/Acre: 16

Downtown TOD Station Areas and Focus Area

DOWNTOWN: RECENT PLANS AND PROPOSALS



Charting our Future (2020)

Character Types and Height in 2050: Downtown

Primary (predominant land uses) Secondary (appropriate, but not predominant) Discouraged

	Sub-Area A	Sub-Area B	Sub-Area C	Sub-Area D	Sub-Area E
Mult-Family, Shops & Offices	●	●	●	●	●
Mult-Family Residential	◉	◉	●	◉	●
Commercial/Office	●	●	◉	●	●
Parks and Green/Gathering Spaces	●	●	●	●	●
Townhouses & Residences	⊖	⊖	⊖	◉	⊖
Institutional/University/Civic	◉	◉	◉	◉	◉
Typical Height: (Adjacent to lower scale residential uses, step backs or other transitional methods are necessary to create harmonious transitions.)	Setback height of to 4 stories, with a core height of up to 8 stories allowed.	Setback height of up to 3 stories with a core height of up to 8 stories allowed. No more than approximately 4 stories allowed in the transitional area	No more than 4 stories	Core height of up to 6 stories, with a setback height of 3 stories. No more than 4 stories allowed in the transitional area	Up to 4 stories at the front setback. Core height of 8 stories allowed on the south side of E Rosemary and 4 stories on the north side of E Rosemary and along West Rosemary. No more than approximately 4 stories allowed in the transitional area.

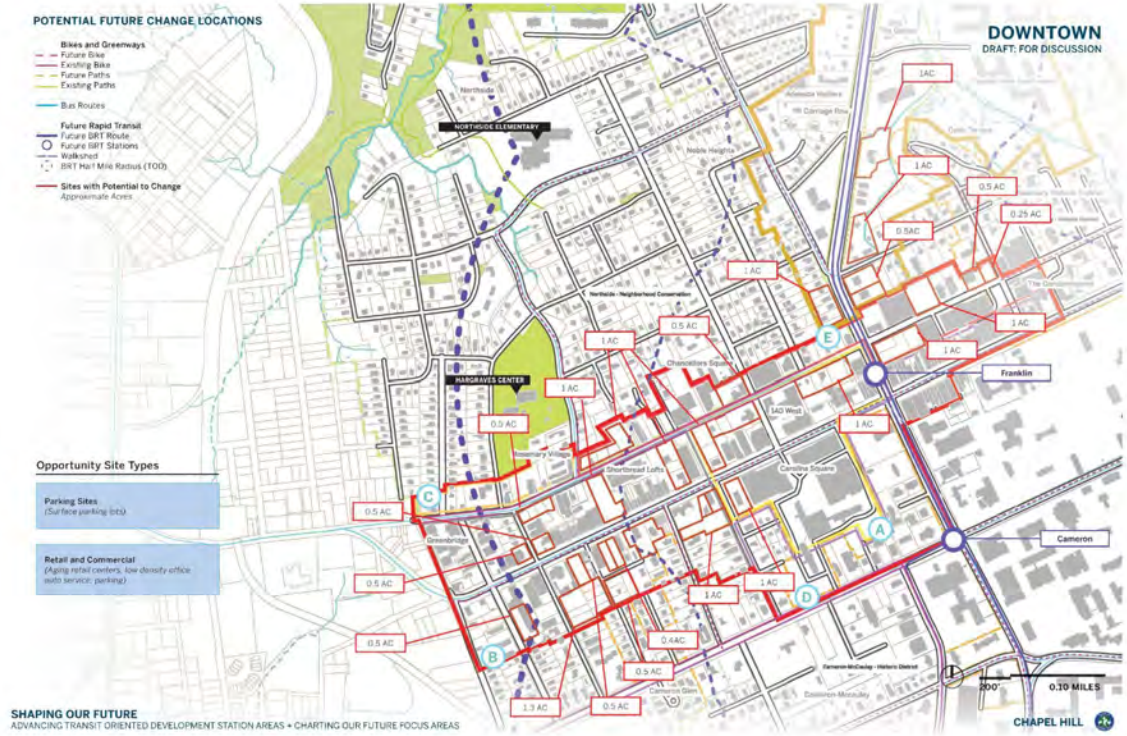
Traditional core of the Town

Franklin-Rosemary Historic District, Chapel Hill National Register District, and UNC campus.

Student, visitor and resident base

Redevelopment will likely occur over time.

DOWNTOWN FOCUS AREA



Preserving and Enhancing the Heart of Chapel Hill.

Social and cultural center of Chapel Hill

Infill development, redevelopment, and adaptive re-use

Special consideration to previous Town planning efforts

Sufficient density to absorb growth, limit impacts to other areas

Attracting year-round residents

Additional office and commercial uses

Potential Sites: **West of Church St**

ASSETS

Regional destination

Proximity to UNC and UNC health

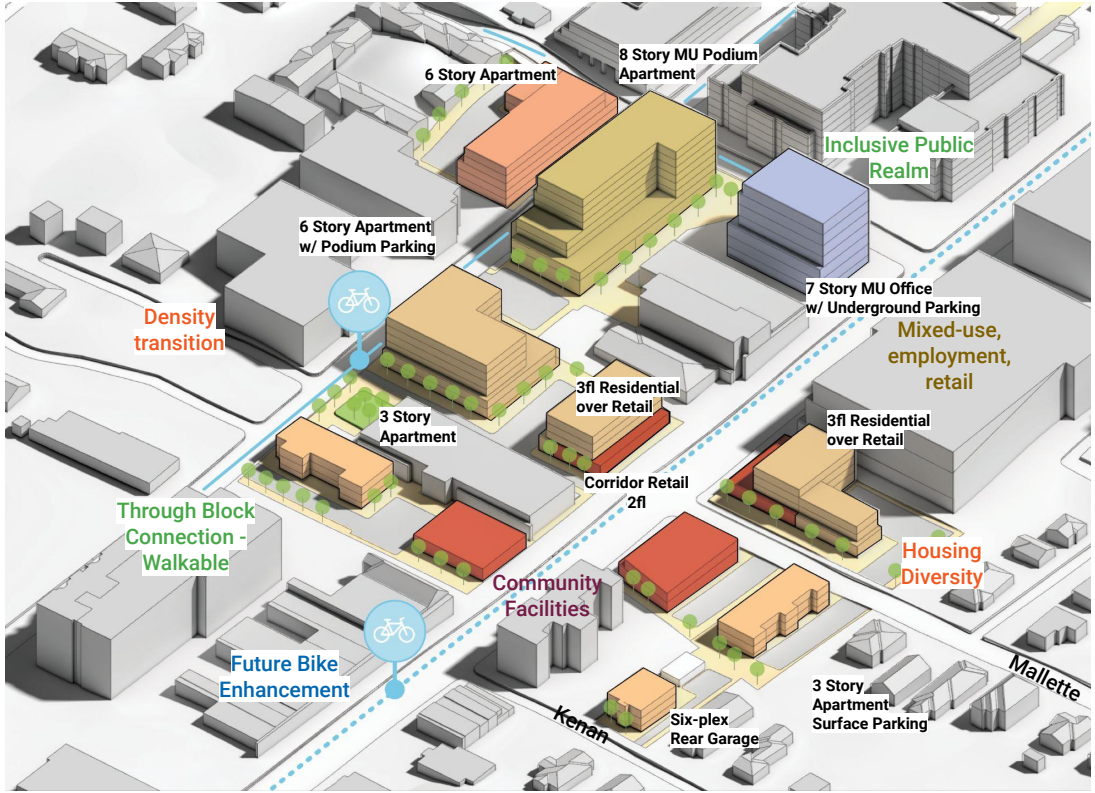
Distinctive local character

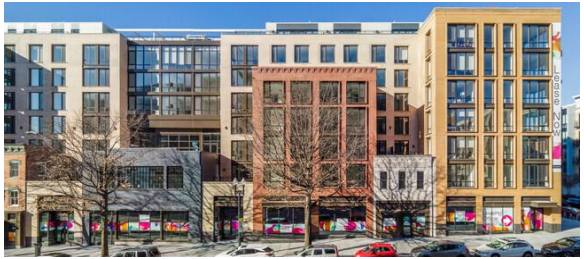
Future bike / greenway connections

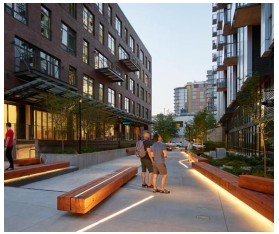
Existing Uses: Primarily parking, low density commercial
Total Acres: 4.9
Factors: Multiple sites and owners
Site 1: Retail
Site 2: Vacant Parking Lot w/ UNC Building
Site 3: Parking Lot with Bank
Site 4: Retail
Site 5: Retail
Site 6: Parking Lot and Retail

Potential Sites: **West of Church St**

A Dynamic Downtown District

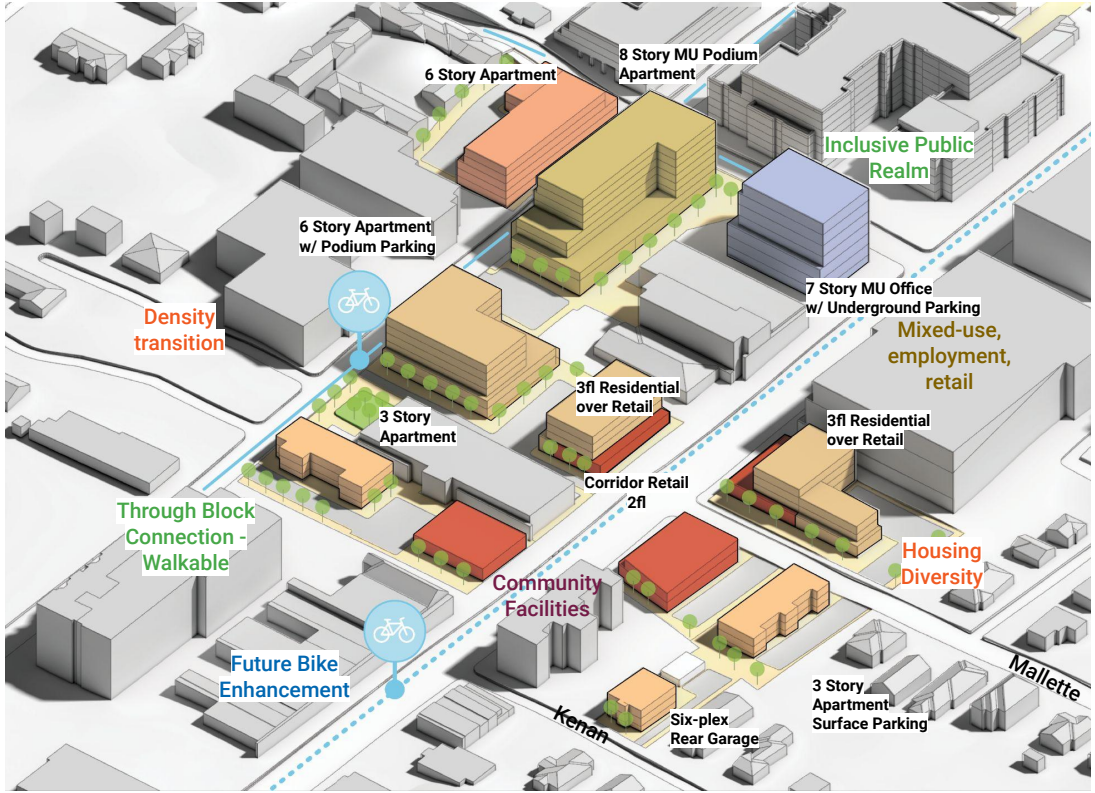






Potential change by 2040

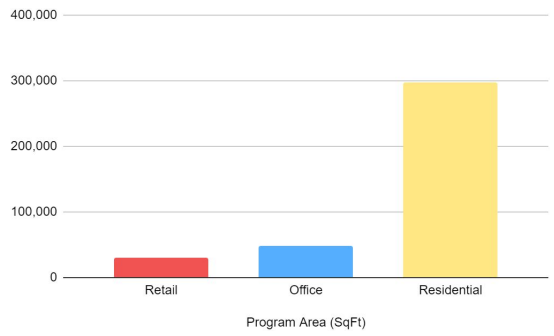
Potential Sites: West of Church St



Potential change by 2040

A Dynamic Downtown District

Use Mix



Residential GFA: 280,000 sq ft

Residential Units: 233

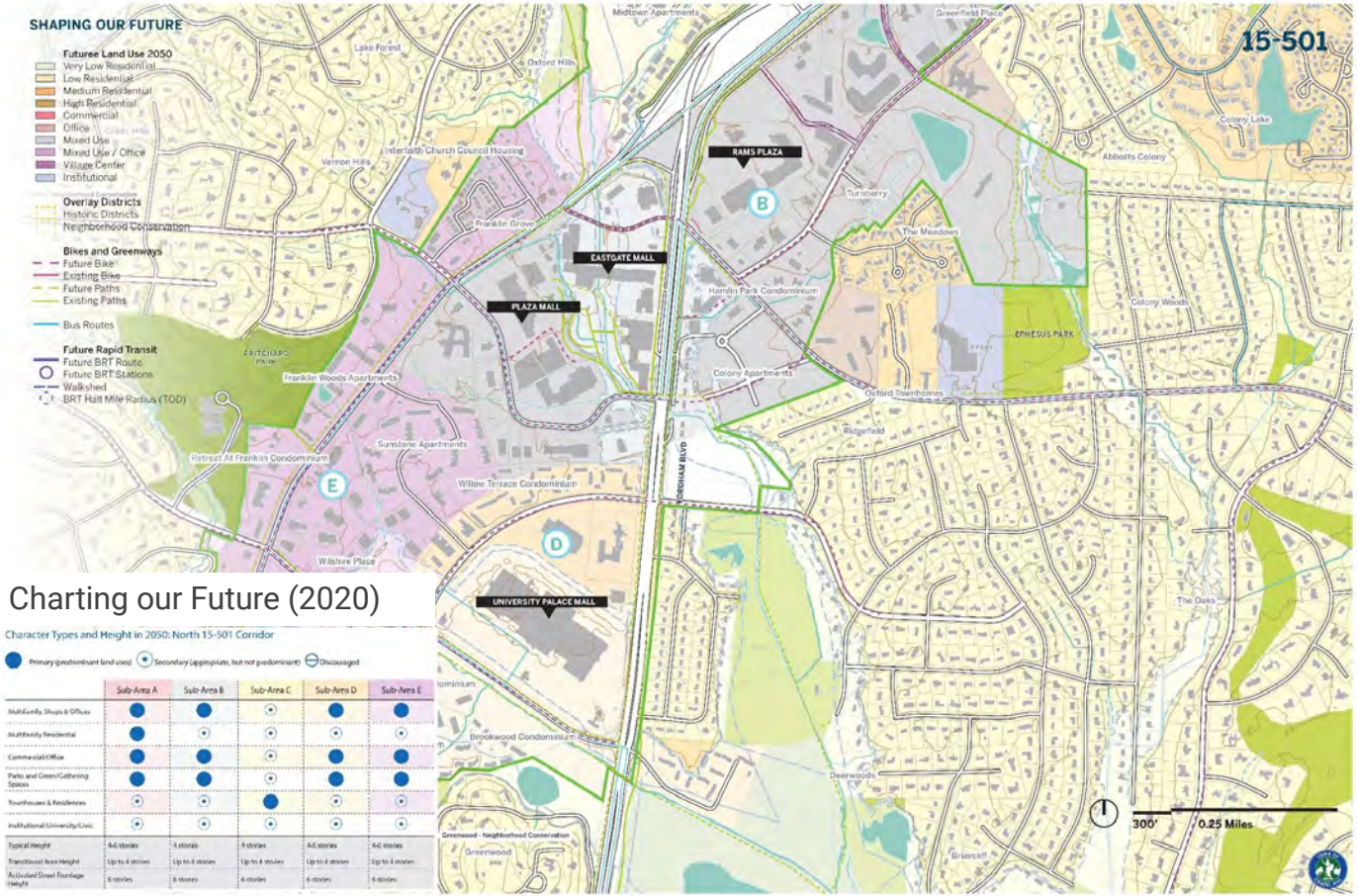
- 200 Apartments
- 33 Missing Middle
- 0 Townhouses
- 0 Higher Density Single Family

Retail GFA: 64,000 sq ft

Office GFA: 50,000 sq ft

15-501 Focus Area

15-501 SOUTH: RECENT PLANS AND PROPOSALS



Charting our Future (2020)

Major retail and commercial center

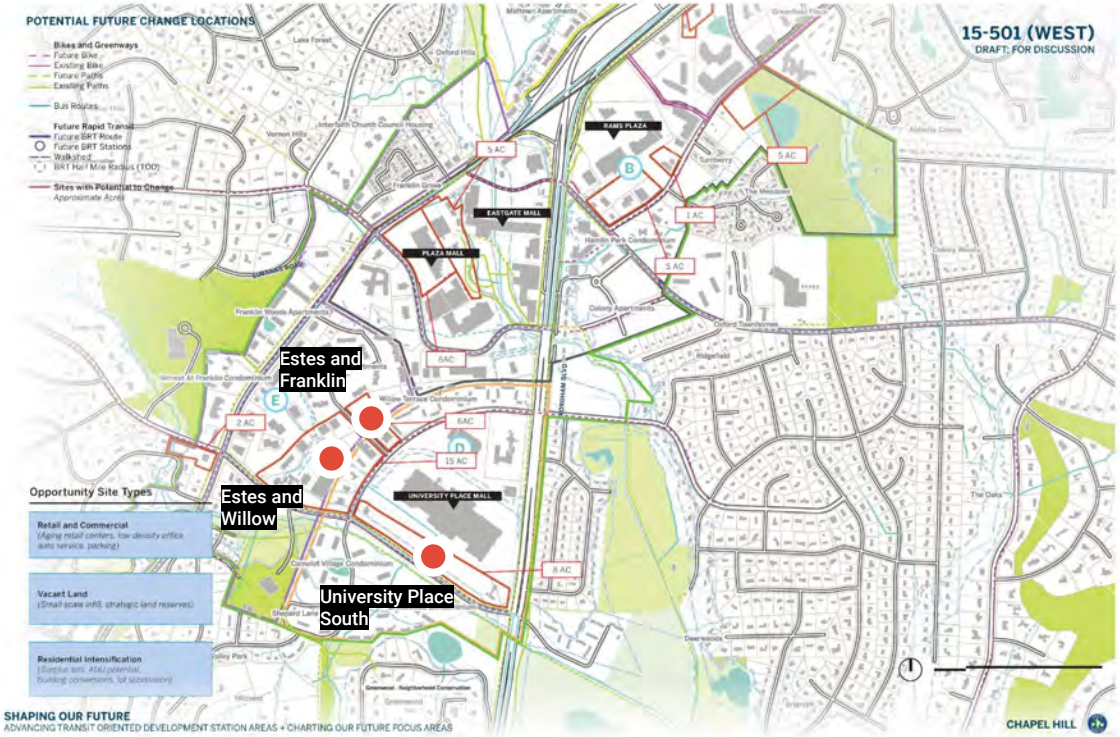
Important gateway from I-40

Higher density housing, commercial, and mixed-use developments

Active development interest

Surrounded by single family neighborhoods

15-501 SOUTH FOCUS AREA



A Destination with a Mix of Higher Intensity Uses

Dynamic mix of higher-intensity uses

Places to shop and reside

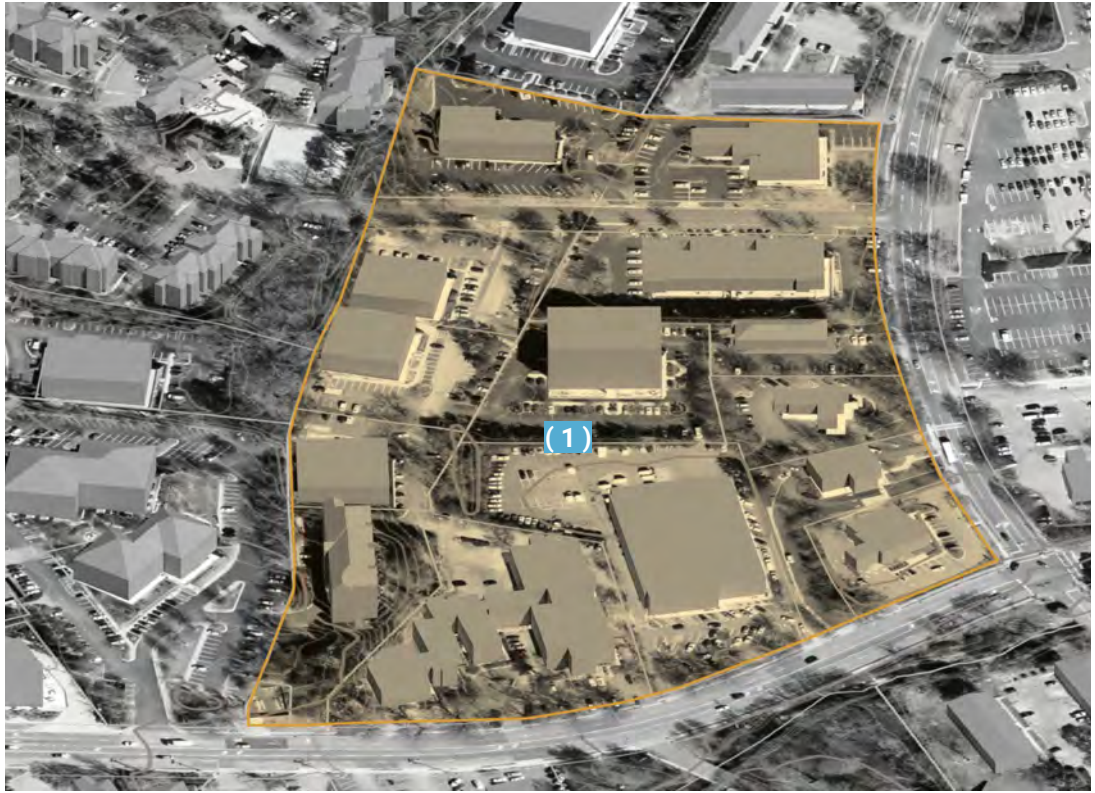
Draws residents, employees, shoppers, and visitors from elsewhere

Active street life

Blend built environment with mature tree canopies

Wide sidewalks, multimodal features

Potential Sites: **Estes and Willow**



ASSETS

Within major corridor

Adjacent renovating mall

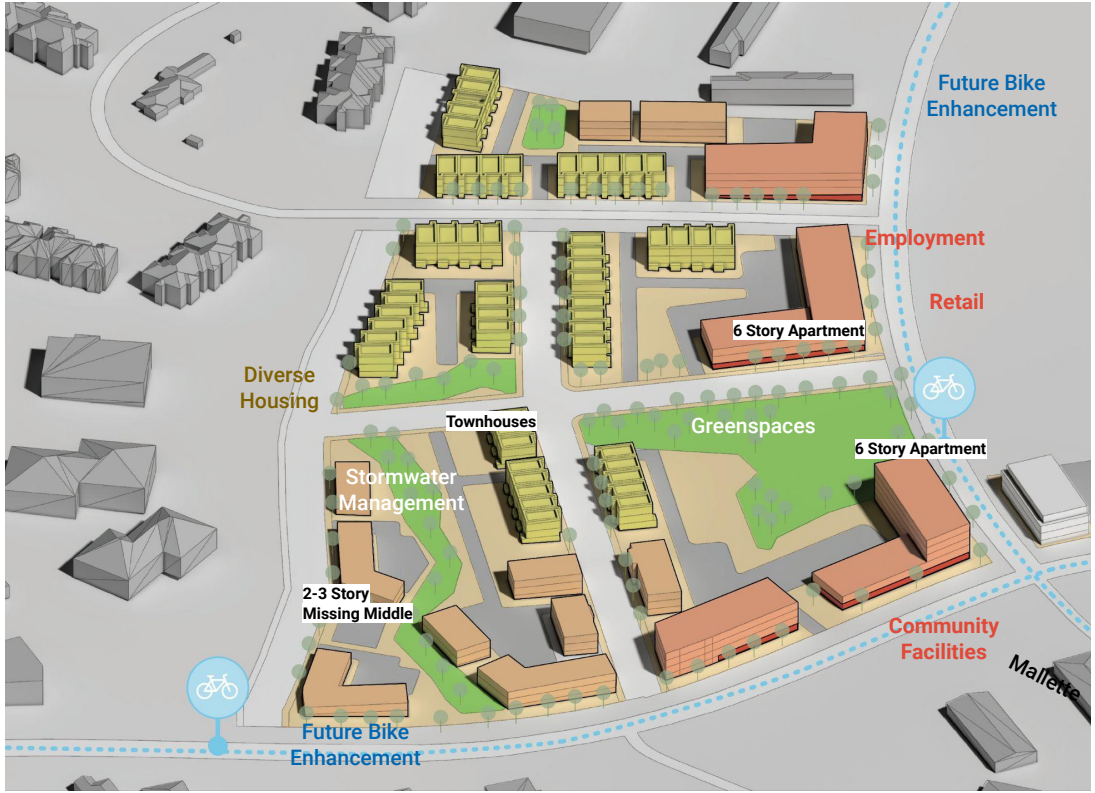
Nearby east-west links

Future bike / greenway connections

Phaseable framework

Existing Uses: Low density office and business
Site: Total Acres: 17ac, Developable: 14ac
Factors: Floodplain, boundary through site, multiple existing owners

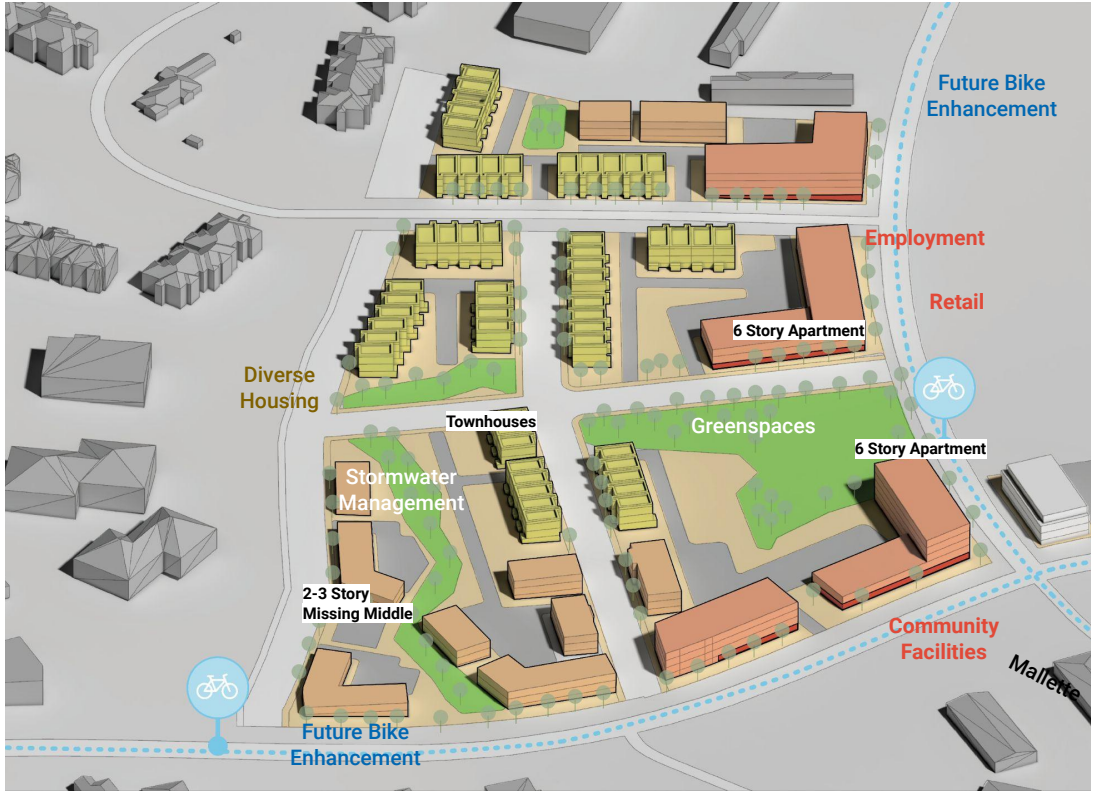
Potential Sites: Estes and Willow



Potential change by 2040

A New Neighborhood

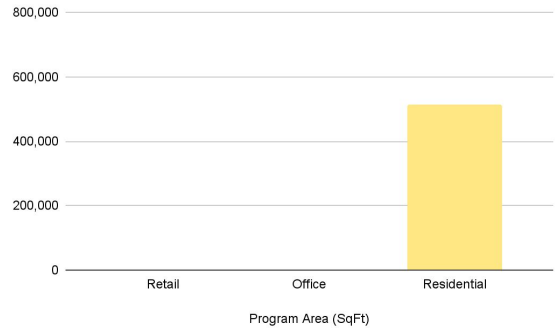
Potential Sites: Estes and Willow



Potential change by 2040

A New Neighborhood

Use Mix



Residential GFA: 500,000 sq ft

Residential Units: 343

- 190 Apartments
- 100 Missing Middle
- 53 Townhouses
- 0 Higher Density Single Family

Retail GFA: 0 sq ft

DU/Acre: 20

IMPLEMENTATION STRATEGIES

- Incentive Tools
  - Gap analysis
  - Menu of federal, state, and local tools
  - Incentive zoning options
- Implementation Timing, Responsibilities

1. Potential (re)development sites
2. Economic development
3. Accessibility
4. Pedestrian and bike improvements
5. Utilities and stormwater infrastructure

- Planning Tools
  - Draft Code Diagnosis
  - Proposed regulatory changes
  - Next steps in Code Rewrite, Zoning Atlas Alignment

TOD Planning & UDO Visioning

SHAPING OUR FUTURE

Small Group Meetings

Draft: Work-in-Progress

AUGUST 2022

CHAPEL HILL

SOM ORION PLANNING+DESIGN OPD neighboring concepts SRF SBFRIEDMAN