

# TOD Planning & LUMO Visioning

## SHAPING OUR FUTURE

### REVIEW: TOD IMPLEMENTATION

### TOWN COUNCIL WORK SESSION

January 18, 2023



Draft Meeting Packet



# AGENDA



**RECAP:** *Shaping Our Future* overview, objectives, and alignment; Council Comments and Feedback



**DISCUSS:** Implementation Recommendations



**REVIEW:** TOD Framework and Site Concepts; Next Steps



**RECAP:**  
***SHAPING OUR FUTURE***

# RECAP: *Shaping Our Future* Overview



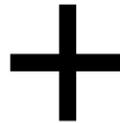
A **transportation and land use initiative** supporting vibrant, walkable places in identified growth areas (Focus Areas) across Chapel Hill.

***Shaping Our Future*** will create homes, services and jobs; attract transit riders; connect neighborhoods; and leverage public and private resources to implement the community's vision in identified Focus Areas. ***Shaping Our Future*** has two primary components:

## SHAPING OUR FUTURE =

**TOD STRATEGY &  
IMPLEMENTATION PLAN**

Final Report Feb. 2023



**LUMO AUDIT & UPDATE**

Final Report Apr. 2023

**Action:** Adopt resolution in support of TOD Strategy & Implementation Plan

**Action:** Confirm approach to LUMO Update:  
Targeted  
Sequential  
**Comprehensive**

# RECAP: *Shaping Our Future Objectives & Outcomes*



## PHASE 1A

### TOD STRATEGY & IMPLEMENTATION PLAN

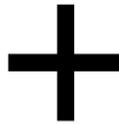
*A refined policy direction for strategic growth and development*

Guides implementation of TOD

Includes:

- Analysis and findings
- Conceptual scenarios
- Recommendations

Establishes a framework and vision for TOD in the NSBRT Corridor



## PHASE 1B, PHASE 2

### LUMO AUDIT & UPDATE

*A regulatory mechanism*

Implements TOD and Complete Community frameworks

Includes:

- Codes
- Regulations
- Standards
- Requirements

Results in a predictable, desirable, supportive built environment in the NSBRT Corridor

# RECAP: *Shaping Our Future*

## Alignment, Consistency and Scale



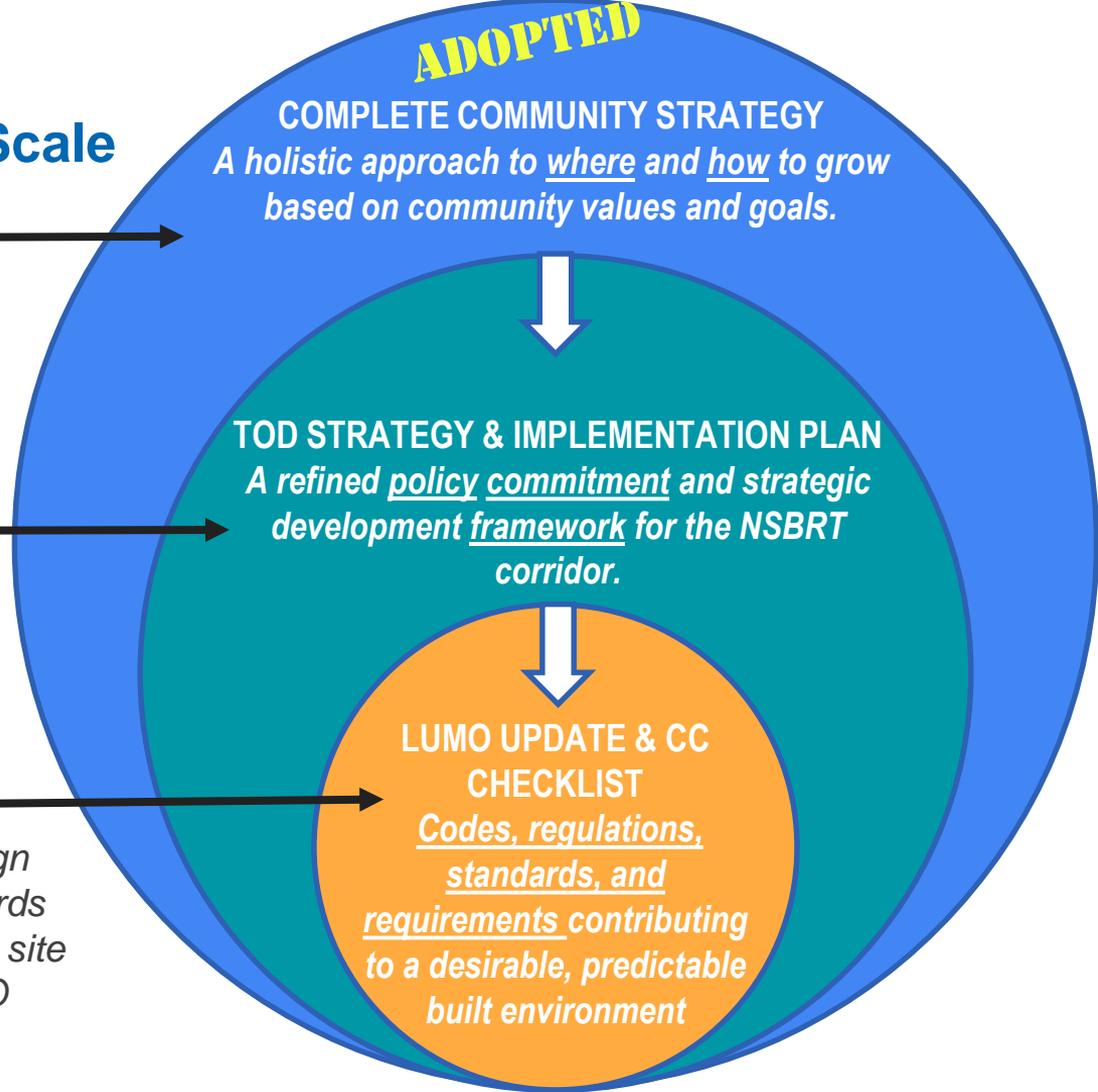
*Complete Community is implemented at the Focus Area scale*



*TOD is implemented at the Station Area scale*



*Development and design regulations and standards are implemented at the site level through the LUMO*





**RECAP:**

# **COUNCIL COMMENTS AND FEEDBACK**

# FOLLOW UP: RESPONDING TO COUNCIL MEMBER FEEDBACK

Definitions & clarifications

Key messaging

Graphic refinements

Topical feedback:

- Growth & Development
- Everywhere to Everywhere (E2E) Greenways
- Equity
- Exceptional Public Realm
- Park & Ride Redevelopment Potential

Comments beyond scope of TOD plan (to be addressed by LUMO update or other regulatory mechanism)

## REGULATE:

- Specific development densities for TOD station areas
- Required or desired mix of uses for TOD station areas
- And/or incentivize higher density/intensity development in TOD station areas
- Require community benefits and amenities (more equitably distributing benefits)
- Greenway connectivity and accessibility standards for TOD station areas

## ADOPT REGULATORY AND POLICY TOOLS:

- Preserving and promoting diverse, affordable housing options in TOD Station Areas
- Mitigating displacement of existing residents and businesses in station areas
- Promoting exceptional public realm standards, (i.e., wide sidewalks, public greens, plazas) reflecting the Town's [high] expectations for development
- Regulating environmental protection, tree canopy protection, green space
- Requiring appropriately-scaled public spaces: pocket parks, vibrant public plazas in station areas
- Reducing or eliminating parking in station areas



# **DISCUSS: IMPLEMENTATION RECOMMENDATIONS**

# REVIEW: IMPLEMENTATION RECOMMENDATIONS

## FOUR CATEGORIES

### Affordable Housing

- Development
- Programs
- Funding
- Planning/Regulation
- Zoning

### Economic Development

- Office
- Retail
- Downtown

### Equitable Multimodal Accessibility & Mobility

- Sidewalks
- Crossings
- Signage/ wayfinding
- Amenities

### TOD Land Use Policies

- Modify existing zoning district(s)
- New standalone TOD district(s)
- New TOD Overlay + incentives

# REVIEW: IMPLEMENTATION RECOMMENDATIONS

## AFFORDABLE HOUSING

- Development
- Programs
- Funding
- Planning/Regulation
- Zoning

Existing · Emerging · Proposed  
Policies & Programs

- ACTIVE TRANSPORTATION OPTIONS
- ACCESS TO PARKS AND GREEN SPACE
- NEW AFFORDABLE HOUSING MODELS
- HOUSING DIVERSITY (INCENTIVIZE ADUs, MULTIPLEXES IN EXISTING NEIGHBORHOODS)
- ACCESS TO HOMEOWNERSHIP FOR HISTORICALLY MARGINALIZED COMMUNITIES
- LIVE/WORK NEIGHBORHOODS



# EXISTING AFFORDABLE HOUSING POLICIES & PROGRAMS

## Policies & programs in place to create & preserve affordable housing

### HOUSING DEVELOPMENT

- 336 Town public housing apartments (Chapel Hill & Carrboro)
- Use of publicly-owned land for new, affordable housing

### HOUSING PROGRAMS

- Home Buyer Assistance & Rental Assistance Programs – Town employees
- Transitional Housing Program: transition from public housing to private market

### FUNDING MECHANISMS

- \$10M affordable housing bond approved in 2018
- Affordable Housing Development Reserve – annual funding from general fund
- Federal government CDBG and HOME funds

### PLANNING & REGULATION

- Affordable Housing Development Fund: in-lieu payments from developers towards affordable housing
- Manufactured Homes Action Plan addresses threat to manufactured home communities in Orange County
- Affordable Housing Preservation Strategy Framework: maintaining NOAH units
- Expedited review process for affordable housing projects

### ZONING POLICIES

- Inclusionary Zoning Ordinance: larger for-sale developments set aside 15% of units (10% in downtown)
- Affordable units or in-lieu payment as part of conditional rezoning applications for rental housing developments
- Single-family units with ADUs allowed by right in most districts

### PARTNERSHIPS & COALITIONS

- Orange County Affordable Housing Coalition collaboration
- Northside Neighborhood Initiative: acquires and sells properties for affordable housing, community land bank strategy
- Town operational support to Community Home Trust – inventory of permanently affordable for-sale homes

# EMERGING POLICIES & PROGRAMS

## Chapel Hill piloting or implementing new housing policies & programs

### HOUSING DEVELOPMENT

- Identifying additional publicly-owned sites that could be used for affordable housing
- Creating a pipeline of affordable housing tax credit projects
- Exploring redevelopment of public housing sites to add density

### HOUSING PROGRAMS

- Starting a revolving loan fund for affordable housing programs

### FUNDING MECHANISMS

- Exploring additional funding mechanism for affordable housing preservation and development

### ZONING POLICIES

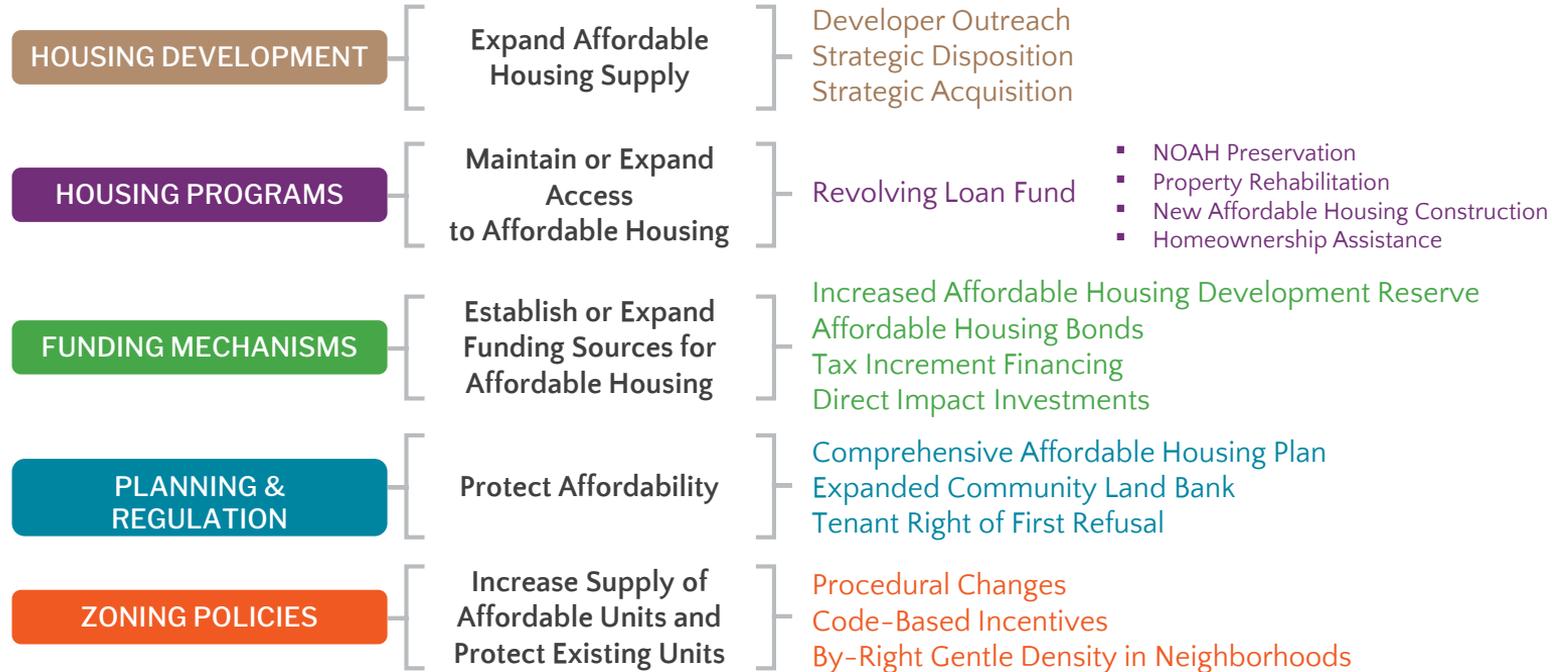
- Consideration of incentives, such as density bonuses
- LUMO update - foster creation and preservation of affordable housing units
- LUMO text amendments to expand housing choices in neighborhoods

### PARTNERSHIPS & COALITIONS

- Town exploring strategies with UNC, UNC Health, private financial institutions, and other partners.

# PROPOSED AFFORDABLE HOUSING TOOLKIT

Protect, expand, diversify and promote affordability





## QUESTION

Are there other **Affordable Housing** implementation priorities to incorporate?

# REVIEW: IMPLEMENTATION RECOMMENDATIONS



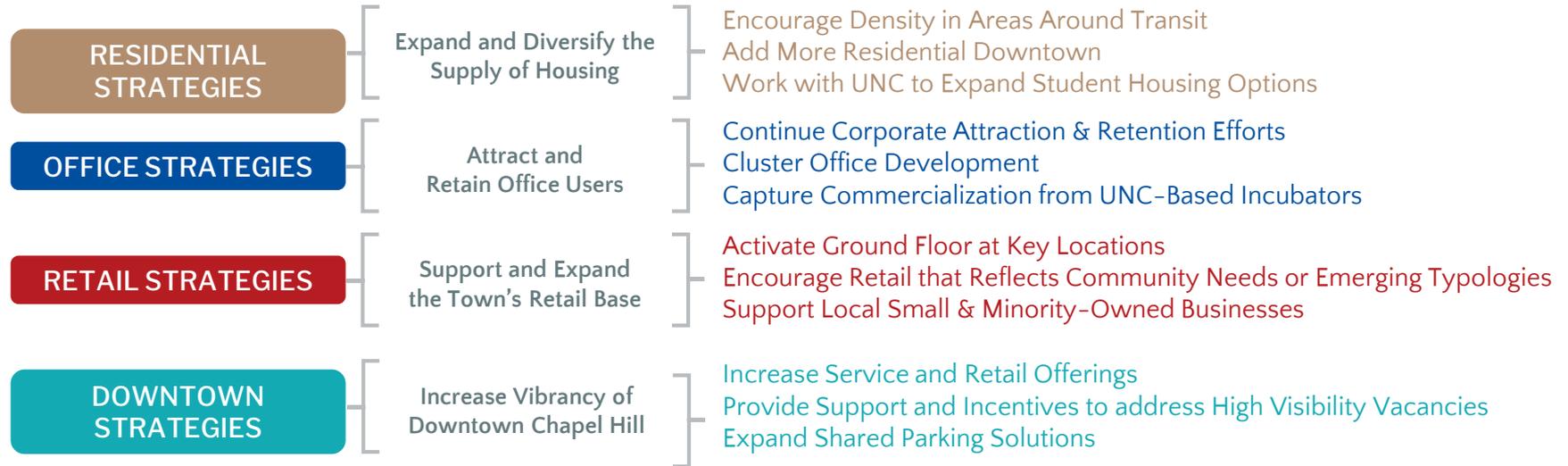
- DAYCARES, SCHOOLS AND COMMUNITY CENTERS
- FOOD / MARKETS
- CULTURAL & SOCIAL EVENTS LINKED TO INDUSTRIES
- EDUCATION & TRAINING
- RESEARCH & DEVELOPMENT
- SERVICES TO SUPPORT INNOVATION & ENTREPRENEURIALISM
- LOCAL INDEPENDENT RETAILERS
- SOCIAL INNOVATION/NON-PROFIT INCUBATORS
- POLICIES TO DRIVE LIVE/WORK SPACES IN  
NEW HOUSING FORMS
- INDOOR AND OUTDOOR RECREATION, FITNESS  
AND PLAY FACILITIES

## ECONOMIC DEVELOPMENT

- Office
- Retail
- Downtown

# ECONOMIC DEVELOPMENT STRATEGIES

## Strategies to facilitate equitable growth and development





## QUESTION

Are there other **Economic Development** priorities to incorporate?

# REVIEW: IMPLEMENTATION RECOMMENDATIONS



## EQUITABLE MULTIMODAL ACCESSIBILITY & MOBILITY

- Sidewalks
- Crossings
- Signage/ wayfinding
- Amenities

# EQUITABLE MULTIMODAL ACCESSIBILITY & MOBILITY STRATEGIES

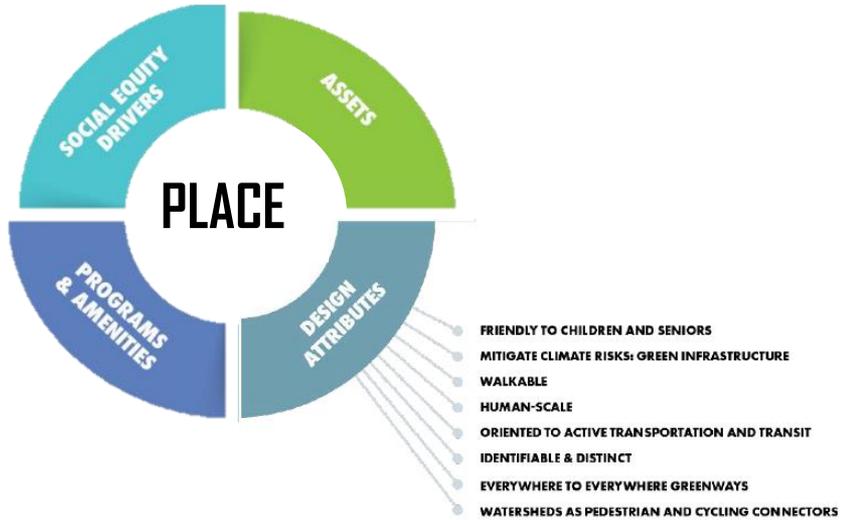
- Sidewalk gaps in BRT corridor: 43 (20,650 linear feet)
- Sidepath gaps in BRT corridor: 8 (4,500 linear feet)
- Sidewalk gaps in focus areas: 5 (2,740 linear feet)
- Sidepath gaps in focus areas: 16 (46,220 linear feet)
- Mid-block crossings at potential development sites and where traffic calming is necessary
- Accessible signage and wayfinding
- Bike parking (secure) and other user amenities (benches, bike racks, trash receptacles, etc.)



## EQUITY METRICS

- Gaps, barrier types, demographics, cost burden analysis, median income data.
- Populations with greater needs, or preferences for bicycling and walking, including “last mile” trips to access transit.
- Locations with lower incomes and rates of vehicle ownership – indicating transit, bike and pedestrian need.

# REVIEW: IMPLEMENTATION RECOMMENDATIONS



## TOD Land Use Policies

- Modify existing zoning district(s)
- New standalone TOD district(s)
- New TOD Overlay + incentives



## QUESTION

Are there other **Equitable Mobility and Accessibility** priorities to incorporate?

# LUMO DIAGNOSIS

- Multiple LUMO modifications over many years - losing clarity and direction
- FLUM acting as site guidance, but LUMO does not provide compatible standards
- LUMO not achieving desired land use patterns, affordable housing, TOD, resiliency and equity
- Low threshold for design and development review
- Complex and extensive review and decision-making processes
- Update required to:
  - **Reflect FLUM Update (2020) Focus Area heights and building typologies**
  - **Achieve North-South BRT TOD objectives**
  - **Achieve Complete Community objectives**
  - **Reflect best practices in land use guidance, regulations, and administration**

# LUMO UPDATE: RECOMMENDED APPROACH – COMPREHENSIVE REWRITE

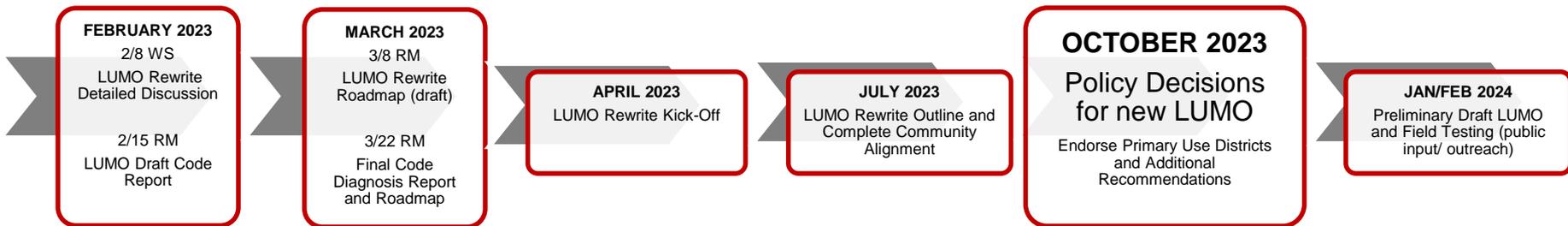
Targeted

Sequential

Comprehensive +

Method	Pros	Cons	Examples
Focus on priority content issues.	Focus and speed	Overall clarity / internal conflicts not resolved	Works best where code is updated frequently
Chapter by chapter, plus holistic view on overall organization.	Pre-established framework to work from, organized review and editing	Inefficiencies - updating shared content multiple times, lengthy process, limits flexibility	Oxford, Mississippi; Twin Falls, Idaho, and Hawaii County, Hawaii
<b>Complete overhaul:</b> organization/ structure, content, administration, review, and approval processes <i>plus</i> targeted short-term revisions	Holistic review of land development standards, incentives, processes - basis for unified development ordinance (LUMO)	Longer process (two years), public engagement, support and training for staff, stakeholders, and elected officials	Raleigh, North Carolina Missoula, Montana

# LUMO UPDATE: RECOMMENDED APPROACH – COMPREHENSIVE REWRITE





## QUESTION

Does Council agree that the **LUMO** requires a comprehensive re-write



# REVIEW: TOD FRAMEWORK & SITE CONCEPTS

*Selected Examples*

# RECAP: EVOLUTION OF TOD STATION AREA CONCEPTS

## STEP 1: SITE LEVEL ASSESSMENTS

Purpose: high level suitability and character analysis

- Identification of assets, opportunities, and potential challenges
- Investigating development capacity



## STEP 2: DRAFT CONCEPTS

Purpose: Presents initial framework/layouts to stimulate discussion and guide refinements

Informed by:

- Existing plans
- Market analysis
- Mobility audit/ infrastructure assessment
- Stakeholder interviews
- Engagement
- Town Council feedback



# RECAP: EVOLUTION OF STATION AREA CONCEPTS

## STEP 3: REFINED CONCEPTS

*Purpose: Integrate comments and feedback; add additional detail*

- Align with Complete Community
- Address additional feedback



## STEP 4: FINAL CONCEPTS

*Purpose: Respond to final round of comments and feedback*

- Included in TOD Strategy & Implementation Plan



# NORTH Martin Luther King Jr. Blvd. FOCUS AREA

## Potential Uses / Typologies

- Community Facility
- Office
- Retail
- Townhouse
- Missing Middle
- Apartment
- Podium or Wrap Apartment

## Potential Site Connections

- Site BRT Path
- Potential Connectivity Enhancements

## Focus Area

- North Martin Luther King Jr. Blvd. Focus Area Boundary

## Transportation

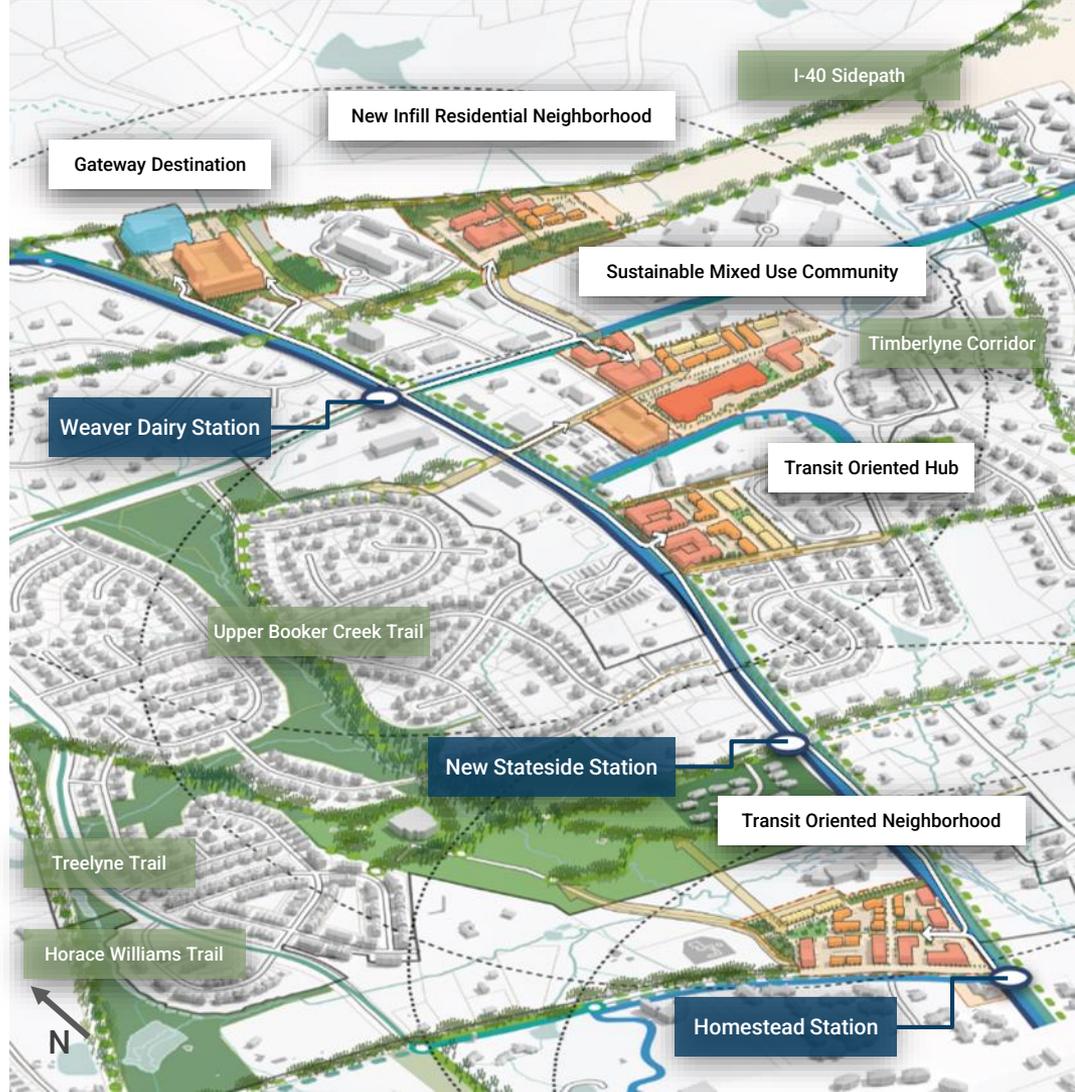
- Bus Route
- BRT Stop
- Station Areas

## Bikeways/Sharrows

- Existing Bike/Sharrows
- Future Bike/Sharrows

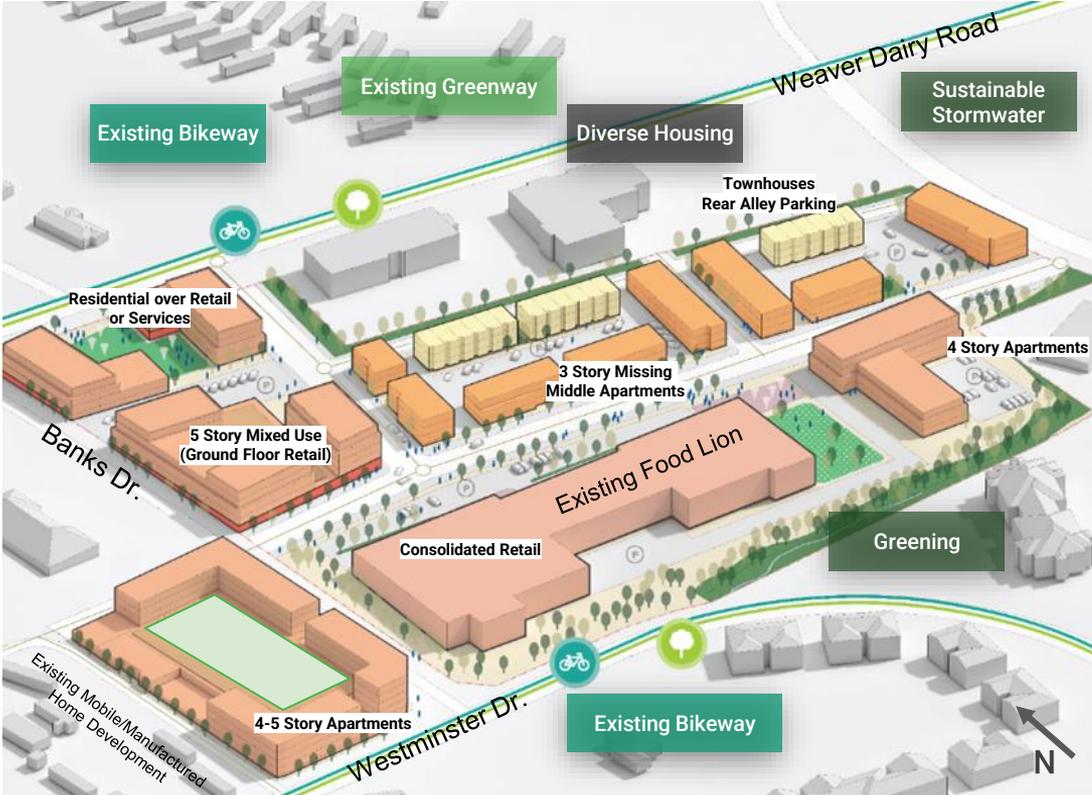
## Greenways/Sidepaths

- Existing Greenways/Sidepaths
- Future Greenways/Sidepaths



# Potential Site: **Timberlyne Mall** A Sustainable Mixed-Use Community

Weaver Dairy TOD



Potential change by 2040: illustrating principles, testing capacity



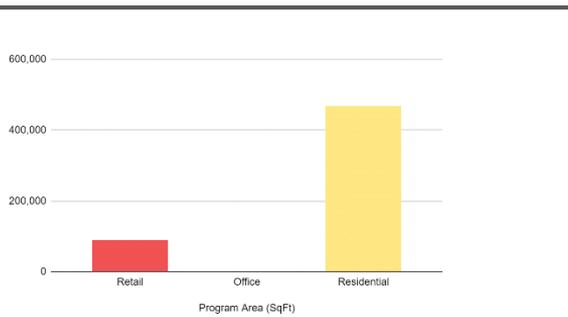
# Potential Site: Timberlyne Mall A Sustainable Mixed-Use Community

## Weaver Dairy TOD



Potential change by 2040: illustrating principles, testing capacity

### Use Mix (Approx)



Residential Units: 340-360

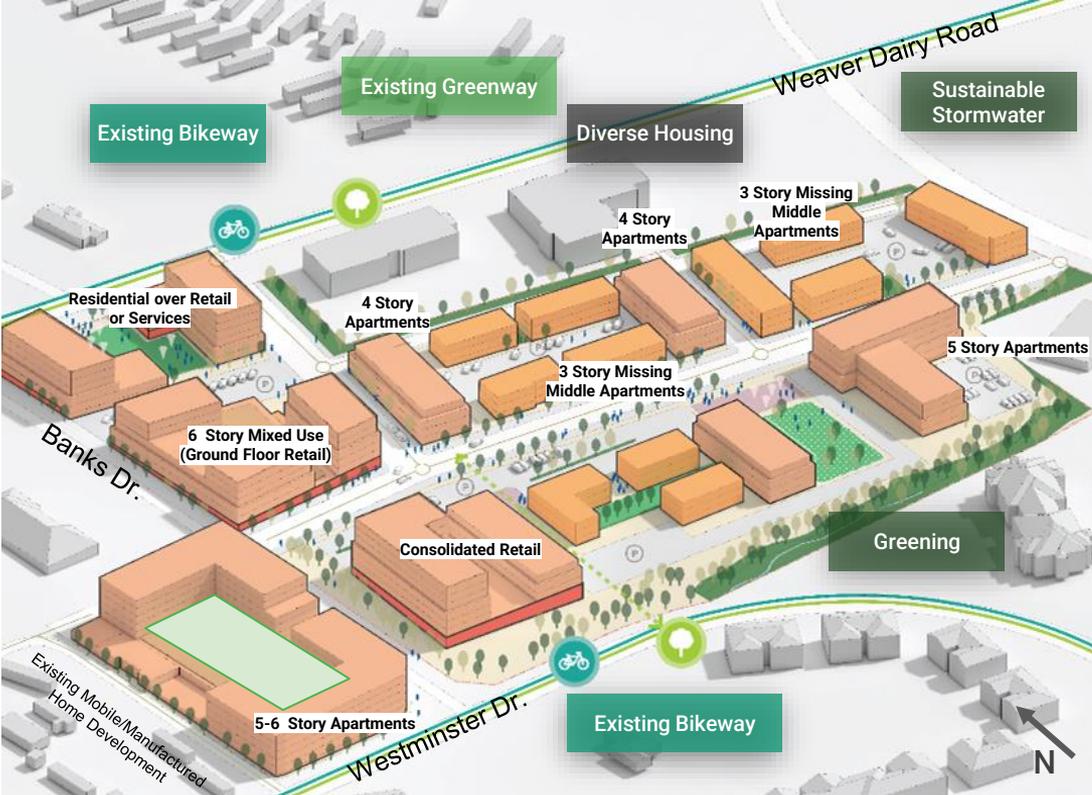
Retail / Mixed Use GFA: 50-55,000 sq ft

DU/Acre: 20-30 Approx



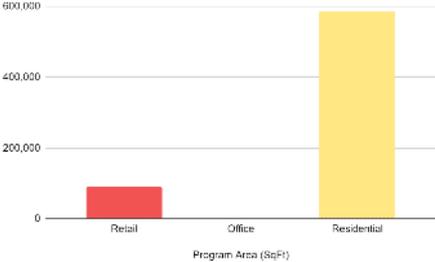
# Potential Site: **Timberlyne Mall** A Sustainable Mixed-Use Community

Weaver Dairy TOD



Potential change by 2040: illustrating principles, testing capacity

## Use Mix (Approx): **Enhanced Outputs**



Residential Units: 470-490

Retail / Mixed Use GFA: 50-55,000 sq ft

DU/Acre: 30-40 Approx

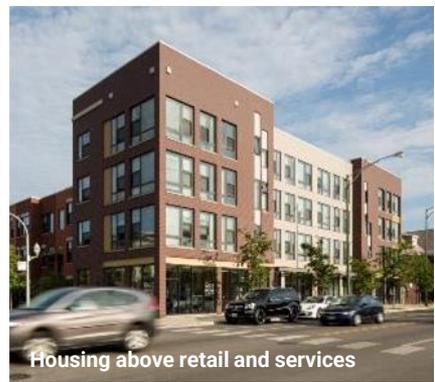
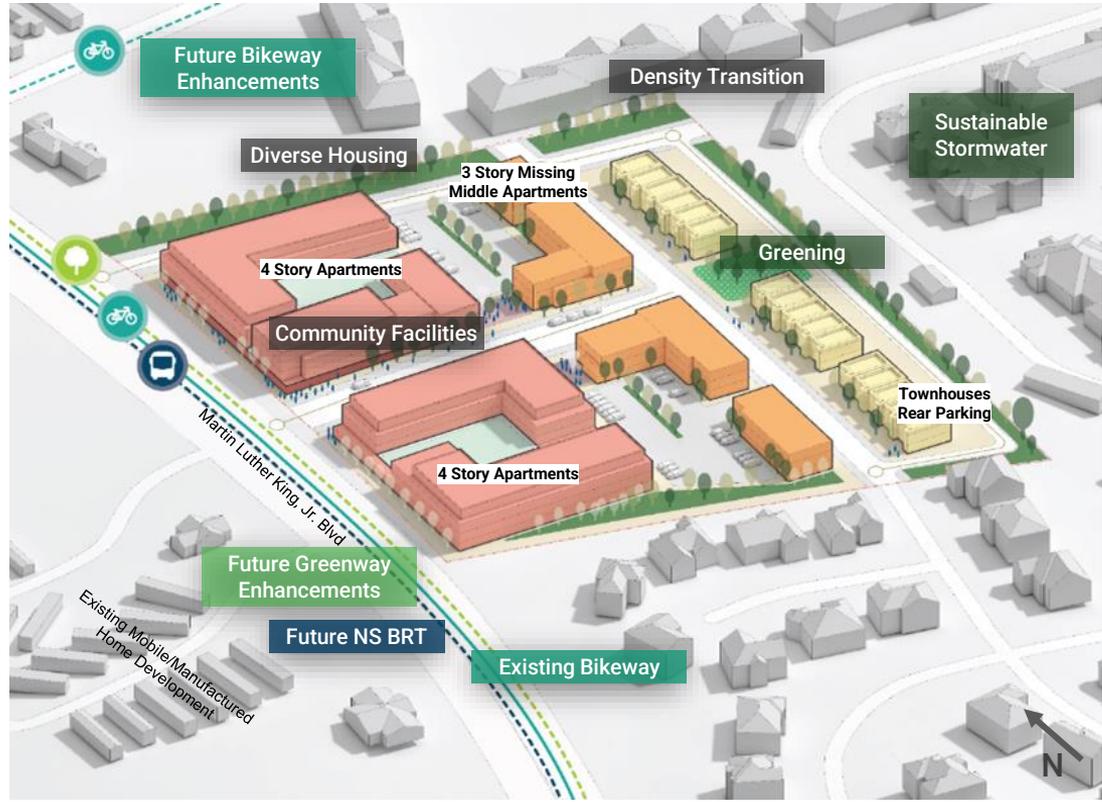


# Potential Site: Martin Luther King Jr. Blvd. and Westminster Drive

Draft: Work-in-Progress

## Weaver Dairy/New Stateside TOD

### A Transit Oriented Hub



Housing above retail and services



Multi-modal streets



Include missing middle housing



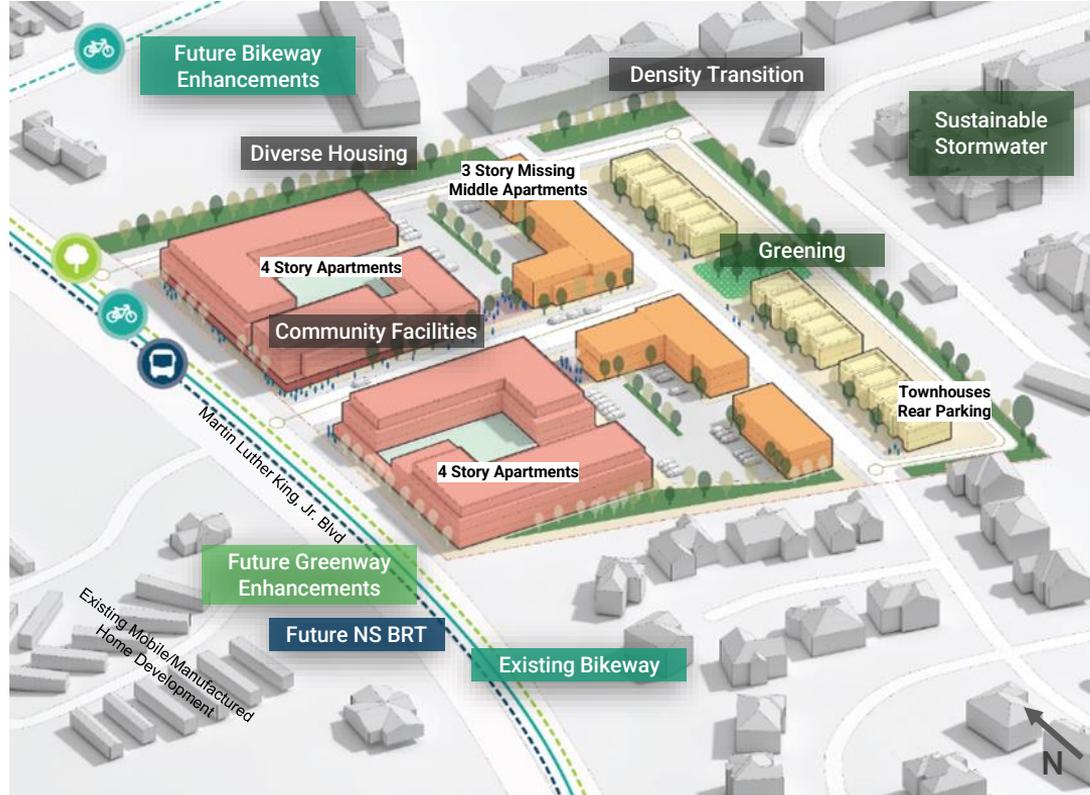
Walkable streets

Potential change by 2040: illustrating principles, testing capacity

# Potential Site: Martin Luther King Jr. Blvd. and Westminster Drive

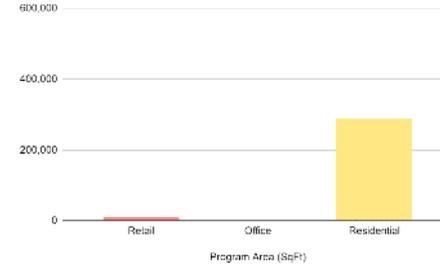
Draft: Work-in-Progress

Weaver Dairy/New Stateside TOD



Potential change by 2040: illustrating principles, testing capacity

## Use Mix (Approx)



Residential Units: 200-220

Retail / Mixed Use GFA: 8-10,000 sq ft

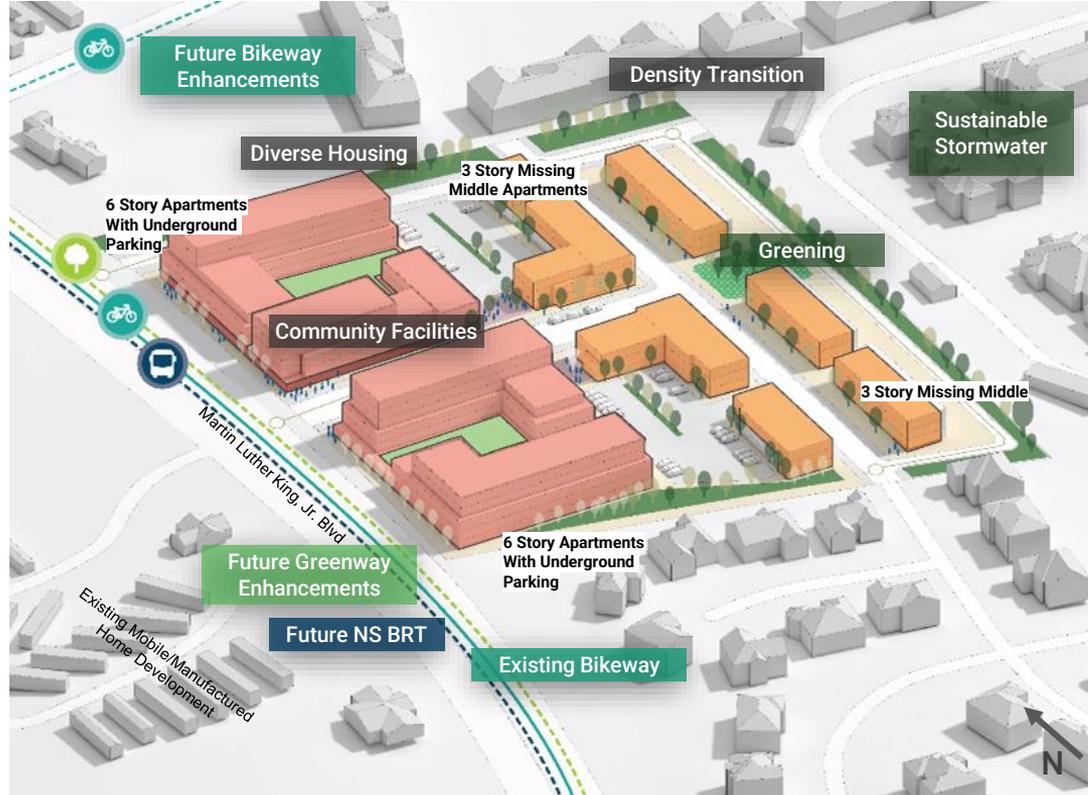
DU/Acre: 20-25 Approx



# Potential Site: Martin Luther King Jr. Blvd. and Westminster Drive 2

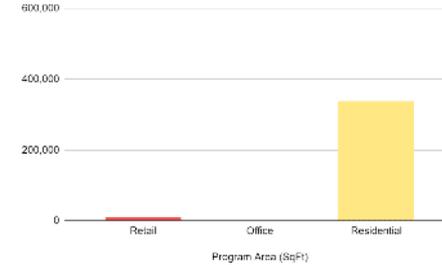
Draft: Work-in-Progress

Weaver Dairy/New Stateside TOD



Potential change by 2040: illustrating principles, testing capacity

## Use Mix (Approx): Enhanced Outputs



Residential Units: 260-280

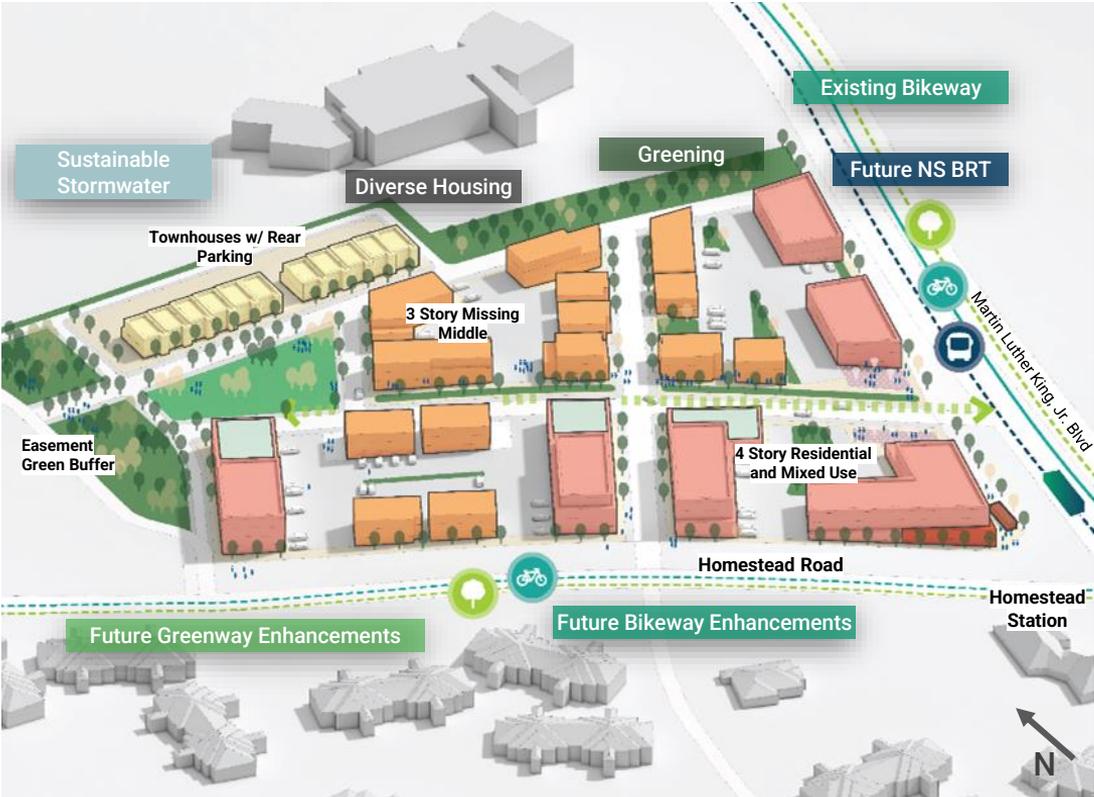
Retail / Mixed Use GFA: 8-10,000 sq ft

DU/Acre: 25-30 Approx



# Potential Site: Homestead Road A TOD Neighborhood

## Homestead TOD



Potential change by 2040: illustrating principles, testing capacity



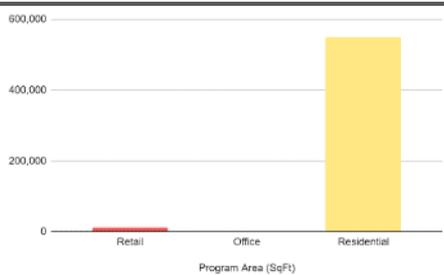
# Potential Site: Homestead Road A TOD Neighborhood

## Homestead TOD



Potential change by 2040: illustrating principles, testing capacity

Use Mix (Approx)



Residential Units: 230-250

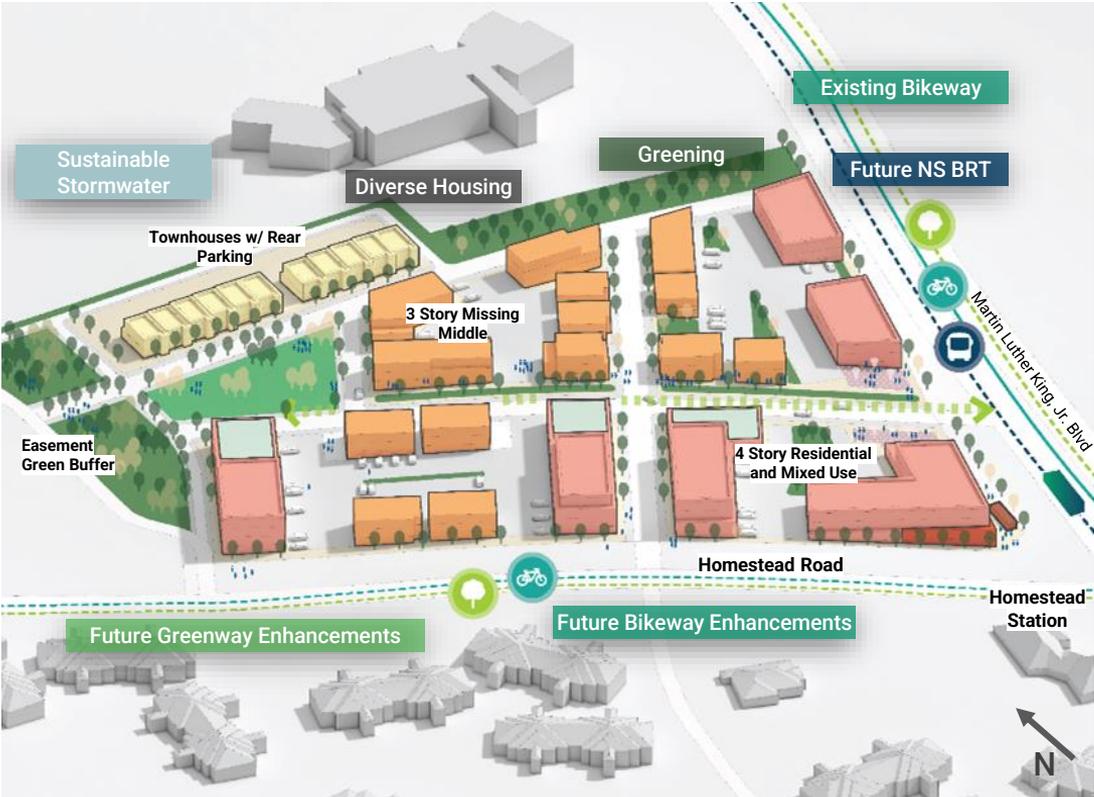
Retail GFA: 8-10,000 sq ft

DU/Acre: 20-25 Approx



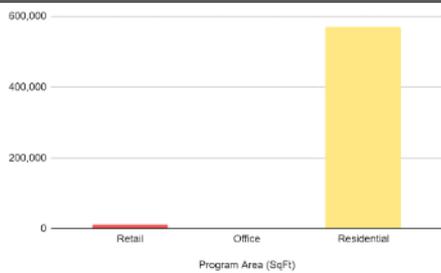
# Potential Site: Homestead Road A TOD Neighborhood

## Homestead TOD



Potential change by 2040: illustrating principles, testing capacity

### Use Mix (Approx): Enhanced Outputs



Residential Units: 250-270

Retail GFA: 8-10,000 sq ft

DU/Acre: 25-30 Approx



# DOWNTOWN FOCUS AREA

## Potential Uses / Typologies

- Community Facility
- Office
- Retail
- Townhouse
- Missing Middle
- Apartment
- Podium or Wrap Apartment

## Potential Site Connections

- Site BRT Path
- Potential Connectivity Enhancements

## Focus Area

- North Martin Luther King Jr. Blvd. Focus Area Boundary

## Transportation

- Bus Route
- BRT Stop
- Station Areas

## Bikeways/Sharrows

- Existing Bike/Sharrows
- Future Bike/Sharrows

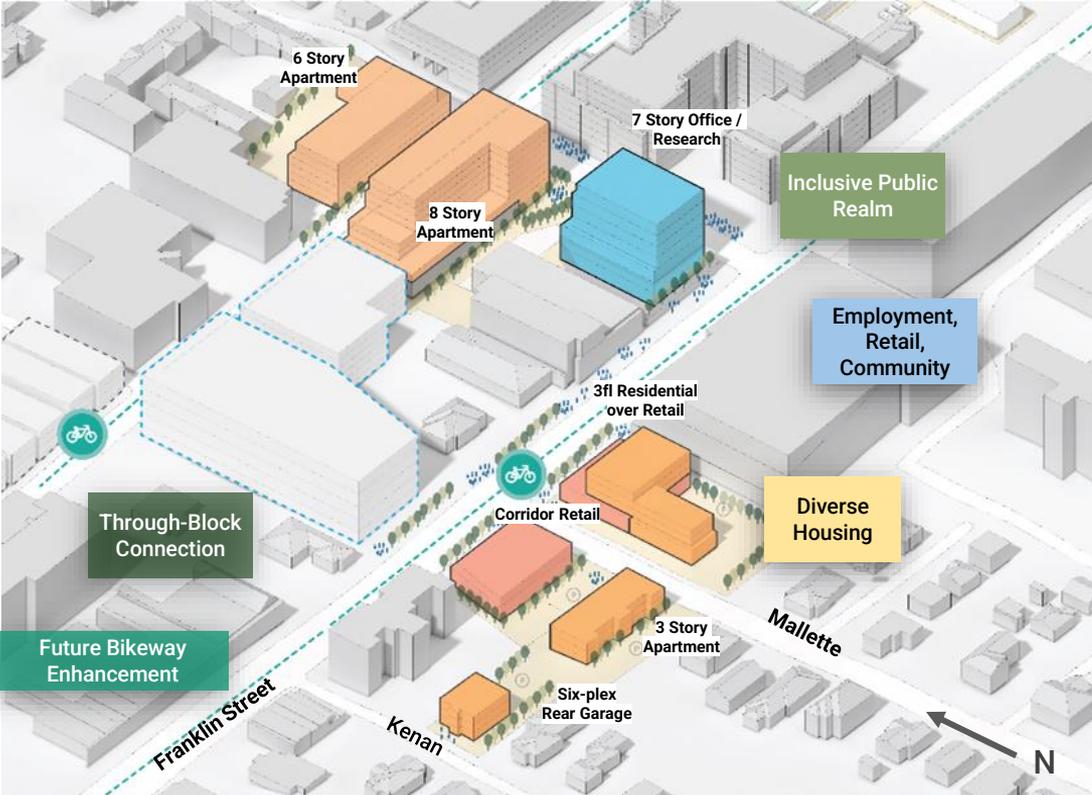
## Greenways/Sidepaths

- Existing Greenways/Sidepaths
- Future Greenways/Sidepaths



# Potential Sites: West of Church St

Downtown TOD



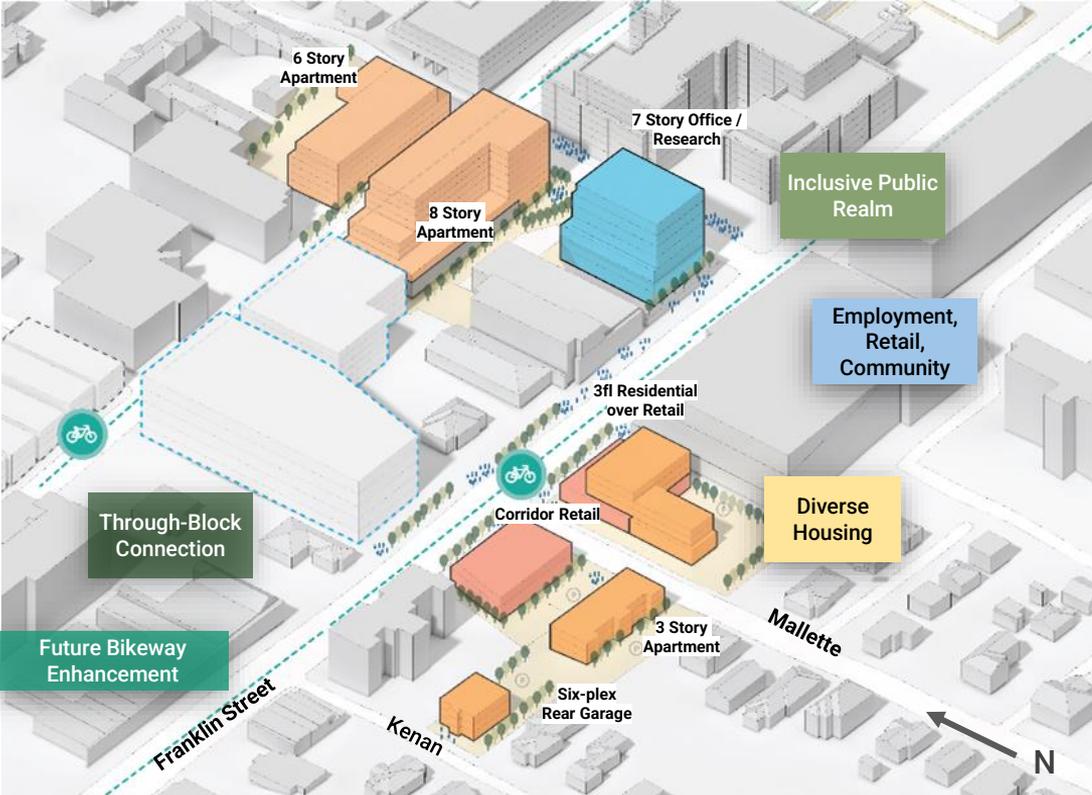
Potential change by 2040: illustrating principles, testing capacity

# A Dynamic Downtown District



# Potential Sites: West of Church St

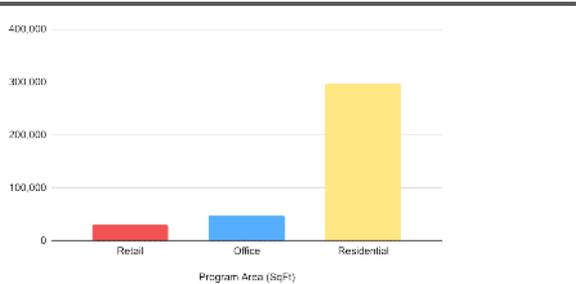
Downtown TOD



Potential change by 2040: illustrating principles, testing capacity

## A Dynamic Downtown District

Use Mix (Approx)



Residential Units: 200-225

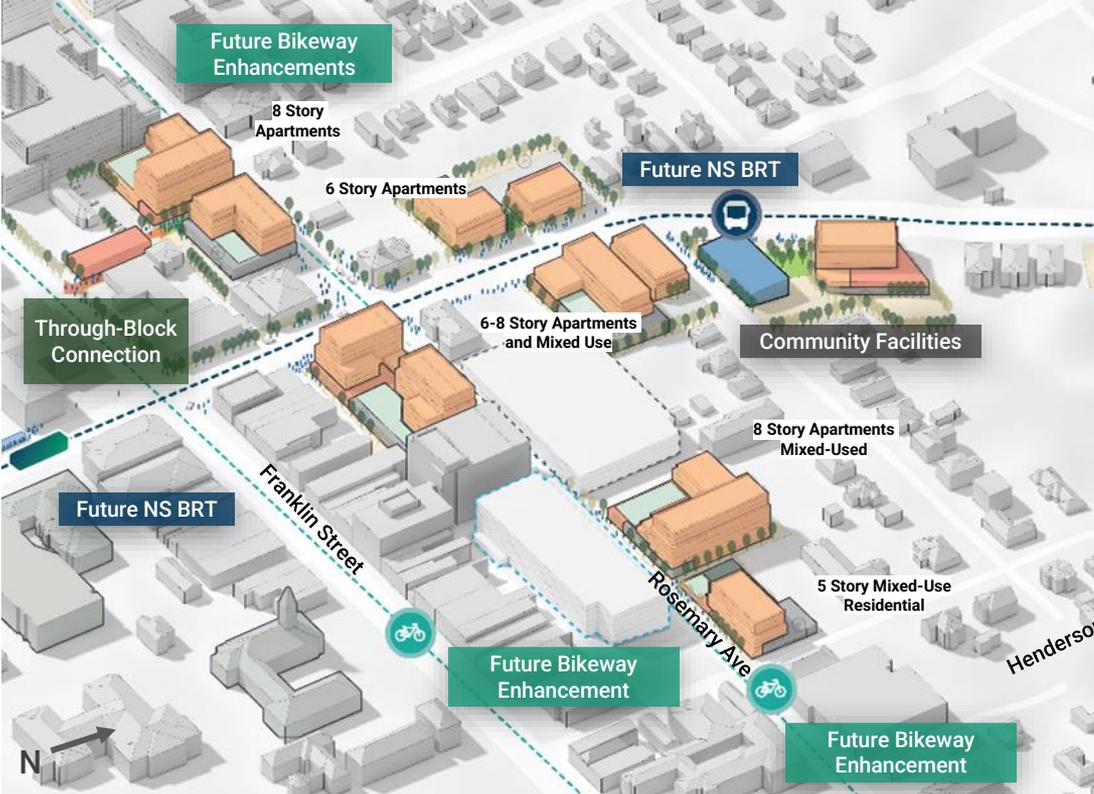
Retail GFA: 50-65,000 sq ft

Office GFA: 45-50,000 sq ft



# Potential Sites: East of Church St

## Downtown TOD

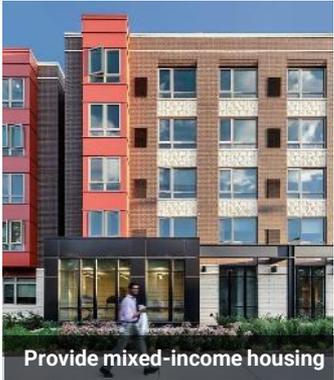


Potential change by 2040: illustrating principles, testing capacity

## Extend Downtown Living



Mix residential and commercial activities



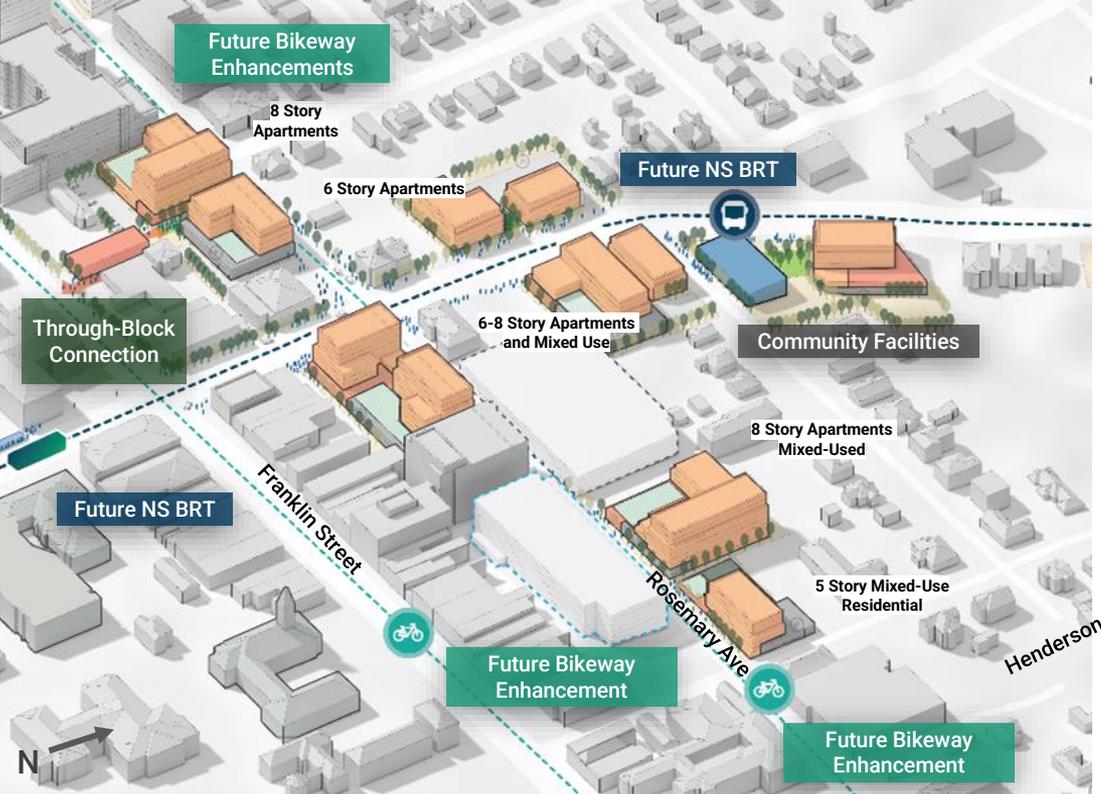
Provide mixed-income housing



Provide walkable streets

# Potential Sites: East of Church St

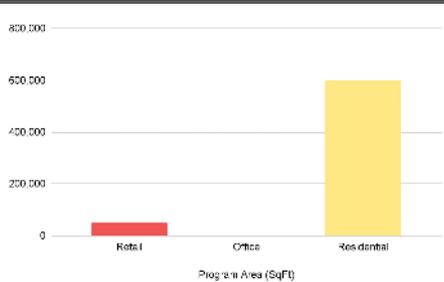
## Downtown TOD



Potential change by 2040: illustrating principles, testing capacity

## Extend Downtown Living

Use Mix (Approx)



Residential Units: 450-500

Retail/ service GFA: 50-55,000 sq ft





# QUESTION

Are there additional components, or elements to prioritize in  
**Station and Focus Areas?**

## DISCUSSION

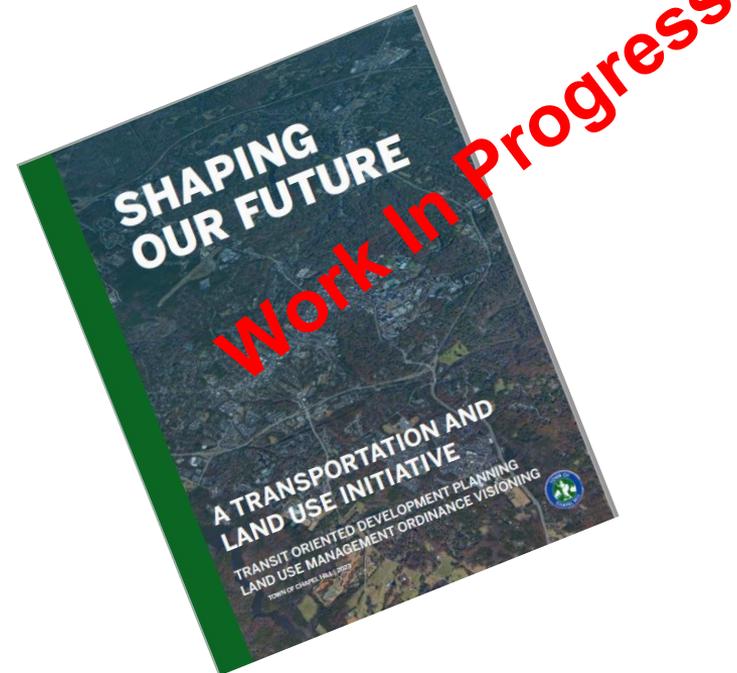
- Questions/clarification about connections between TOD Plan and LUMO Update and/or objectives of *Shaping Our Future* project phases
- Questions, concerns, clarifications about disposition of comments and feedback
- Questions, concerns, or clarifications about implementation recommendations

## NEXT STEPS

- Staff to post and share *Shaping Our Future* TOD Implementation Strategies and Plan for Council and public review
- Staff return to Council on February 22, 2023: request Council adopt *Shaping Our Future* TOD Implementation Strategies and Plan and open public hearing to amend Comp Plan to include *Shaping Our Future*

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# APPENDIX

# Implementation Management

# Implementation Management: Affordable Housing

Action Area	Strategy	Program, Policy, Investment	Timetable: 2023-24	Timetable: 2025-30	Lead Department or Division	Implementation Partners	Implementation Partners
<b>Affordable Housing</b>							
Town Policies and Programs in Development							
<b>Housing Development</b>							
	Exploring redevelopment of public housing sites to add density				Public Housing	Planning	
	Identifying additional publicly-owned sites for affordable housing				Public Housing	Planning	
	Establishing a pipeline of affordable housing tax credit projects				Affordable Housing	Planning	Private and non-profit developers
<b>Housing Programs</b>							
	Establishing a revolving loan fund for affordable housing programs				Affordable Housing	Planning	Private and non-profit developers
<b>Funding Mechanisms</b>							
	Exploring additional funding mechanisms and partnerships				Affordable Housing	Public Housing	Private and non-profit developers
<b>Planning and Regulation</b>							
	"Gentle density" ordinance, to increase densities in the lowest density zoning districts.				Planning	DEI	
<b>Zoning Policies</b>							
	Re-examining affordable housing incentives, such as density bonuses				Planning	Affordable Housing	DEI
	Updating the LUMO to better foster the preservation and creation of affordable housing				Planning	Affordable Housing	DEI
	Exploring LUMO text amendments to expand housing choices in neighborhoods				Planning	Affordable Housing	DEI
<b>Partnerships and Coalitions</b>							
	Expanding acquisition and development strategies to include partnerships				Affordable Housing	Town Manager	

# Implementation Management: Affordable Housing

Action Area	Strategy	Program, Policy, Investment	Timetable: 2023-24	Timetable: 2025-30	Lead Department or Division	Implementation Partners	Implementation Partners
<b>Affordable Housing</b>							
Potential Future Policies and Programs							
<b>Developer Outreach</b>							
	Promoting Town opportunities to affordable housing developers				Affordable Housing	Town Manager	DEI
<b>Strategic Disposition</b>							
	Existing TOCH land inventory				Affordable Housing	Town Manager	Planning
	UNC / UNC Health Partnerships				Affordable Housing	UNC / UNC Health	Planning
	Mission driven landowners				Affordable Housing	Town Manager	Planning, DEI
	Developer RFP Processes				Planning	Affordable Housing	Town Manager, DEI
<b>Strategic Acquisition</b>							
	Vacant parcels, aging commercial centers.				Planning	Town Manager	Economic Development, DEI
	Preservation of Naturally Occurring Affordable Housing (NOAH) units				Affordable Housing	Town Manager	Planning, DEI
<b>Revolving Loan Fund</b>							
	Naturally Occurring Affordable Housing (NOAH) Preservation.				Affordable Housing	Town Manager	
	Property Rehabilitation.				Affordable Housing	Town Manager	DEI
	New Affordable Home Construction				Affordable Housing	Town Manager	DEI
	Homeownership Assistance.				Affordable Housing	Town Manager	

# Implementation Management: Affordable Housing

Action Area	Strategy	Program, Policy, Investment	Timetable: 2023-24	Timetable: 2025-30	Lead Department or Division	Implementation Partners	Implementation Partners
<b>Affordable Housing</b>							
Potential Future Policies and Programs							
	<b>Funding Mechanisms</b>						
		Increased Affordable Housing Development Reserve			Affordable Housing	Town Manager	
		Affordable Housing Bonds			Affordable Housing	Town Manager	
		Tax Increment Financing			Affordable Housing	Town Manager	DEI
		Direct Impact Investments			Affordable Housing	Town Manager	DEI
	<b>Planning and Regulation</b>						
		Comprehensive Affordable Housing Plan			Affordable Housing	Planning	Town Manager, DEI
		Expanded Community Land Bank			Affordable Housing	Planning	Town Manager, DEI
		Tenant Right of First Refusal			Affordable Housing	Town Manager	
	<b>Zoning Policies</b>						
		Procedural Changes			Planning	Town Manager	
		Code-Based Incentives			Planning	Affordable Housing	DEI
		By-Right Gentle Density in Neighborhoods			Planning	Affordable Housing	DEI
	<b>Partnerships</b>						
		Work with UNC to Expand Housing Options			Affordable Housing	Town Manager	

# Implementation Management: Economic Development

Action Area	Strategy	Program, Policy, Investment	Timetable: 2023-24	Timetable: 2025-30	Lead Department or Division	Implementation Partners	Implementation Partners
<b>Economic Development</b>							
<b>Office Implementation Strategies</b>							
		Continue Corporate Attraction and Retention Efforts			Economic Development	Chamber of Commerce	
		Cluster Office Development			Economic Development	Planning	
		Capture Commercialization from UNC-Based Incubators			Economic Development	UNC	
<b>Retail Implementation Strategies</b>							
		Activate Ground Floor at Key Locations			Economic Development	Downtown Partnership	Chamber of Commerce
		Encourage Retail that Reflects Community Needs or Emerging Typologies			Economic Development	Downtown Partnership	Chamber of Commerce
		Support Local Small and Minority-Owned Businesses			Economic Development	Downtown Partnership	Chamber of Commerce
<b>Downtown Implementation Strategies</b>							
		Add More Residential Downtown			Planning	Affordable Housing	
		Provide Support and Incentives to Property Owners with High Visibility Retail Vacancies			Economic Development	UNC	
		Expand Shared Parking Solutions			Economic Development	UNC	

# Implementation Management: Accessibility

Action Area	Strategy	Program, Policy, Investment	Timetable: 2023-24	Timetable: 2025-30	Lead Department or Division	Implementation Partners	Implementation Partners
<b>Pedestrian and Bike Enhancements</b>							
	N-S BRT Station ADA improvements				Chapel Hill Transit	Public Works	
	N-S BRT Station Area improvements				Public Works	Chapel Hill Transit	Transportation Planning, DEI
	N-S BRT Station last mile connections				Public Works	Chapel Hill Transit	Transportation Planning, DEI
	15-501 Focus Area				Public Works	Transportation Planning, DEI	
	NC-54 Focus Area				Public Works	Transportation Planning, DEI	
	Transportation Greenways				Public Works	Transportation Planning, DEI	

# Implementation Management: LUMO

Action Area	Strategy	Program, Policy, Investment	Timetable: 2023-24	Timetable: 2025-30	Lead Department or Division	Implementation Partners	Implementation Partners
<b>Land Use Management Strategies</b>							
	Complete LUMO Audit				Planning		
	Complete Town of Chapel Hill Planning Assessment				Planning	Town Manager	
	Establish technical team: staff and consultants				Planning	Town Manager	
	Confirm LUMO Vision and Objectives				Planning	Town Manager	
	Establish design guidelines				Planning	Town Manager	Sustainability
	Prepare technical draft: Comprehensive LUMO rewrite				Planning	Town Manager	Sustainability, Affordable Housing
	Draft administrative and development review process				Planning	Town Manager	
	Engagement and review				Planning		
	Final draft: Comprehensive LUMO rewrite				Planning	Town Manager	
	Final consultation				Planning		
	Adoption: Comprehensive LUMO rewrite				Planning		
	Zoning map / atlas update				Planning	Town Manager	

# GROWTH FORECASTS

# CHAPEL HILL CAPTURE OF HOUSING DEMAND

Chapel Hill could capture between 6,410 and 8,910 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

- The majority of units are in multifamily buildings of varying size.

## 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

- Relative to the “Historic Trend” scenario, a larger share are in large multifamily buildings (20+ units)
- Missing Middle demand overlaps with Single Family, Attached and Multifamily, 2-19 Units demand

# CHAPEL HILL PIPELINE RECONCILIATION

Beyond pipeline developments, Chapel Hill will need 5,785 additional homes by 2040

## HISTORIC TREND CAPTURE

	SF, Detached	SF, Attached	MF, 2-19	MF, 20+	Total
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

- Under the “Historic Trend” scenario, there is demand for an additional 3,285 units beyond the current Town pipeline.

## DEMAND DRIVEN CAPTURE

	SF, Detached	SF, Attached	MF, 2-19	MF, 20+	Total
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

- Under the “Demand Driven” scenario, there is demand for an additional 5,785 units beyond the current Town pipeline.

# HOUSING DEMAND 2040 – NET OF PIPELINE

- **Demand Driven: higher share of regional housing**
  - Diverse housing for local residents and workforce
  - Mitigate upward price pressure
  - Transit supportive densities
  - Densities supporting viability of services and public realm
  - Meeting the Town’s Guiding Principles (FLUM)
  - Reflecting Complete Communities principles
  
- **Historic Rate: historic share of regional housing**
  - Falling share of the regional population
  - Increased competition between students and long-term residents for lower cost housing.
  - Housing less affordable for low and moderate-income households

## REMAINING UNITS TO MEET HOUSING DEMAND

### DEMAND DRIVEN CAPTURE RATE



### HISTORIC TREND CAPTURE RATE

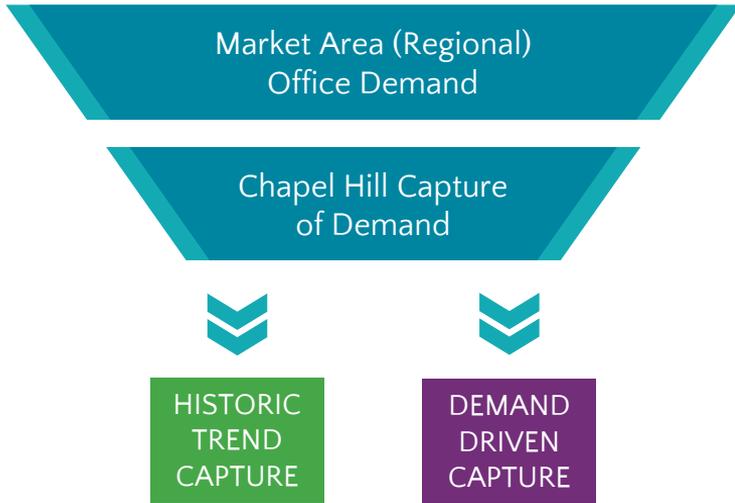


0 1,000 2,000 3,000 4,000 5,000 6,000

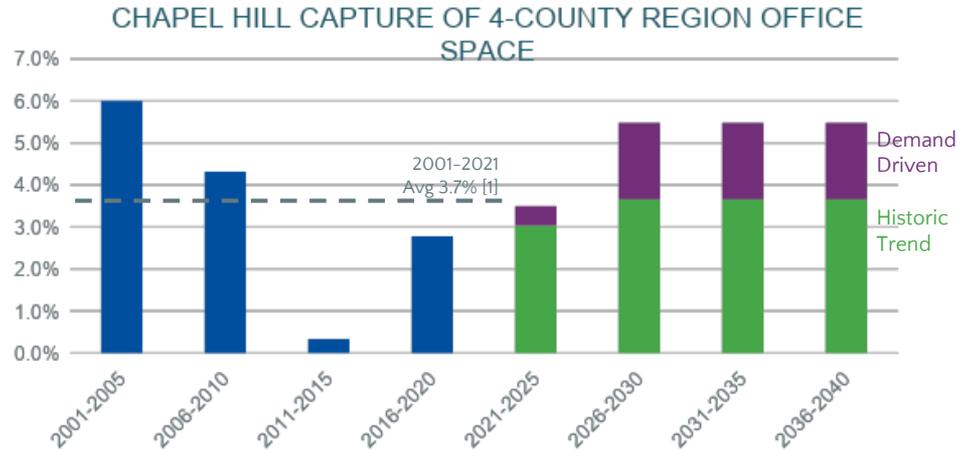
- Single Family, Detached
- Single Family, Attached
- Multifamily, 2-19 Units
- Multifamily, 20+ Units

# CHAPEL HILL CAPTURE OF OFFICE DEMAND

SB Friedman evaluated office demand under historic & enhanced capture rates



- 2001 and 2020, Chapel Hill captured 3.7% of new regional office space
- “Historic Trend” scenario: Chapel Hill Town continues to capture 3.7%
- “Demand Driven” scenario: Chapel Hill increases regional office capture to 5.1%.



# CHAPEL HILL CAPTURE OF OFFICE DEMAND

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

## HISTORIC TREND CAPTURE

**700–800K SF**

Larger-Scale Corporate  
Office Space by 2040

**70–75K SF**

Professional  
Office Space by 2040

- Chapel Hill could support between 770K and 875K SF of new office through 2040.
- Given recent tenant profile, the majority of space will be in larger-scale corporate office buildings.

## DEMAND DRIVEN CAPTURE

**1.0–1.1M SF**

Larger-Scale Corporate  
Office Space by 2040

**80–85K SF**

Professional  
Office Space by 2040

- Chapel Hill could support between 1.0M and 1.2M SF of new office through 2040.
- A greater share of space would be in larger-scale corporate office buildings

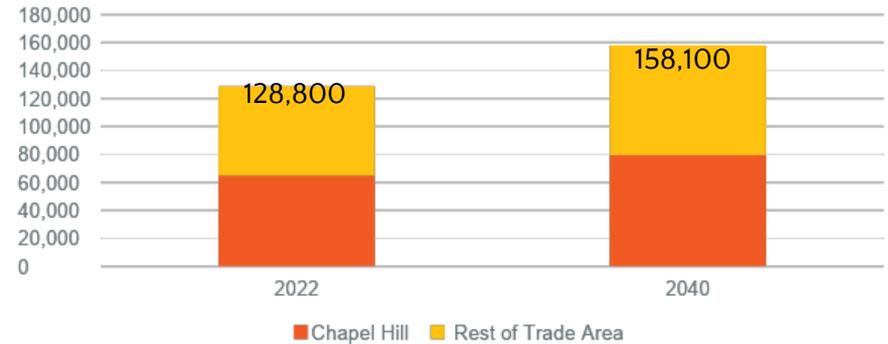
# POPULATION GROWTH & RETAIL SPENDING

## Primary Trade Area extends west from Chapel Hill

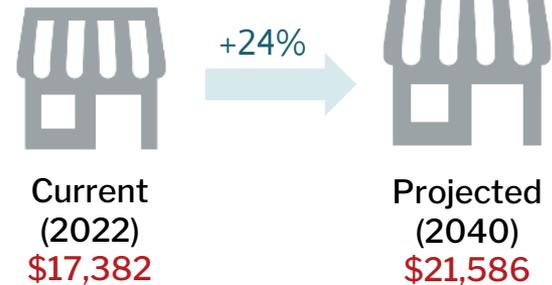
- Chapel Hill trade area: 128,800 residents
- Approx half of live in Chapel Hill itself
- “Demand Driven” scenario: trade area’s population will increase to 158,100 by 2040.
- Trade area projected to become more affluent
- Trade area per capita retail spending is projected to increase by 24% by 2040 in real terms.

Source: Business Analyst, ESRI, SB Friedman

### TRADE AREA PROJECTED POPULATION



### TRADE AREA PER CAPITA RETAIL SPENDING

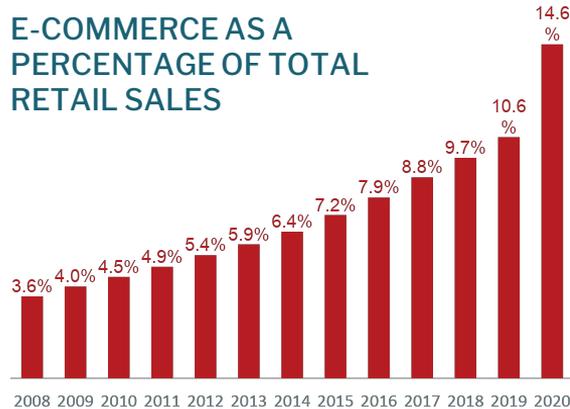


# RETAIL TRENDS

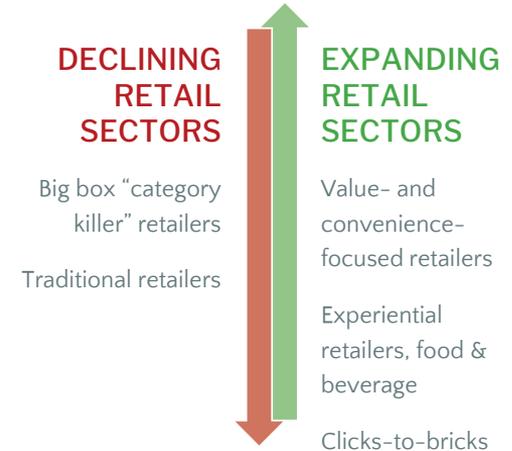
## Recent trends are impacting bricks & mortar retail nationally

- Growth of e-commerce is impacting brick & mortar retail development
- Accelerated by the COVID-19 pandemic.
- Traditional retailers repositioning brick & mortar stores to accommodate multi-channel & omni-channel shopping.
- Some retail sectors declining, others expanding.

### E-COMMERCE AS A PERCENTAGE OF TOTAL RETAIL SALES



Source: SB Friedman, US Census Bureau



# DEMAND PROJECTIONS

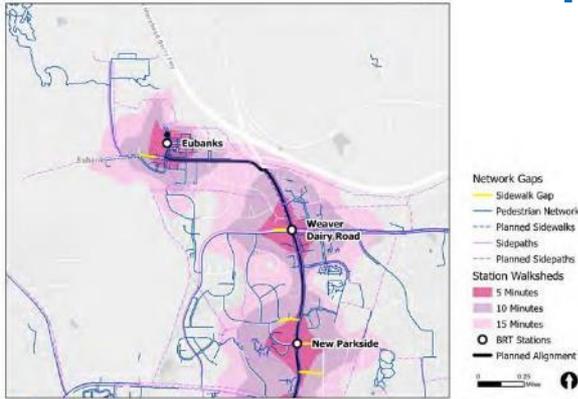
Chapel Hill could support an additional ±660K SF of retail space by 2040

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		\$96M	\$320	25%	75,000
Electronics and appliance stores	<p>*2040 Demand Lower Than Current Demand</p>	\$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	<p>*2040 Demand Lower Than Current Demand</p>	\$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
<b>Total Occupied Retail SF</b>					<b>522,000 SF</b>
<i>Non-Retail SF % (Services, Medical &amp; Professional Office, etc.)</i>					15.0%
Total Occupied SF					614,000 SF
<i>Vacancy Rate</i>					7.0%
<b>Total Supportable SF</b>					<b>660,000 SF</b>

# ACCESSIBILITY AUDIT

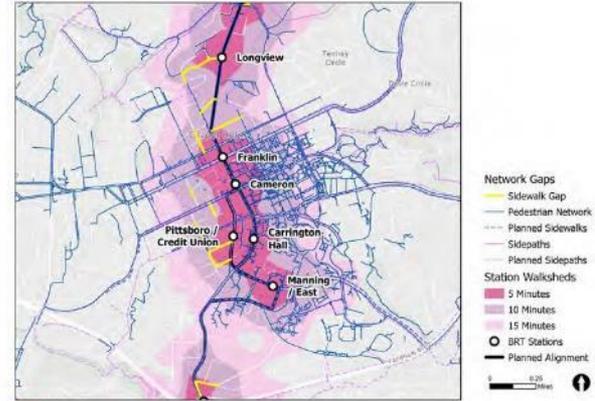
## Supplemental Information

# N-S BRT Pedestrian Network Gaps



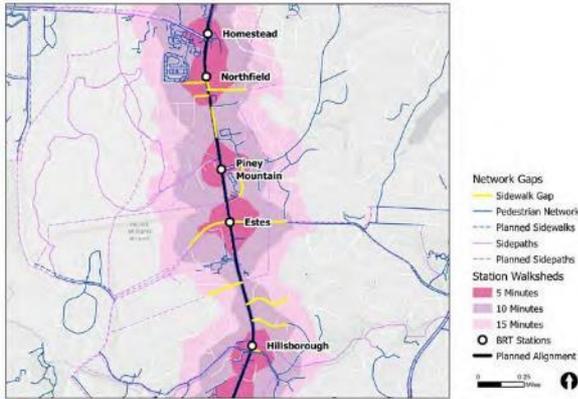
**SRF** Pedestrian Network Gaps - North MLK  
Chapel Hill Transit Oriented Development

Pedestrian Network Gaps- MLK North



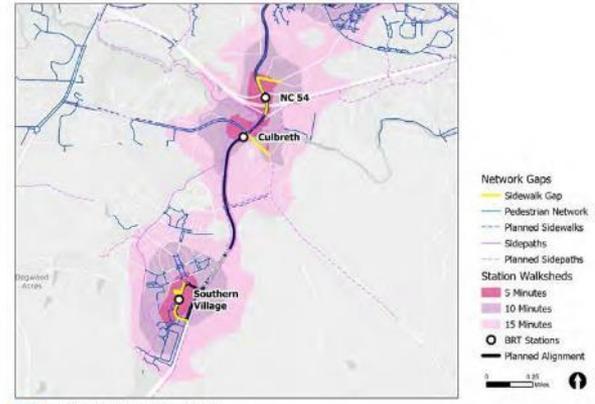
**SRF** Pedestrian Network Gaps - Downtown  
Chapel Hill Transit Oriented Development

Pedestrian Network Gaps- Downtown



**SRF** Pedestrian Network Gaps - South MLK  
Chapel Hill Transit Oriented Development

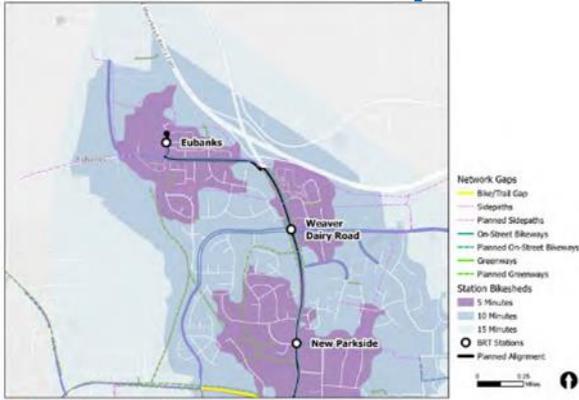
Pedestrian Network Gaps- MLK North and South



**SRF** Pedestrian Network Gaps - 15-501  
Chapel Hill Transit Oriented Development

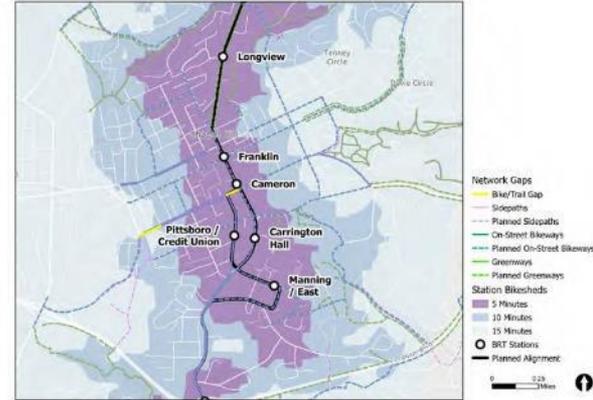
Pedestrian Network Gaps- South Columbia

# N-S BRT Bike Network Gaps



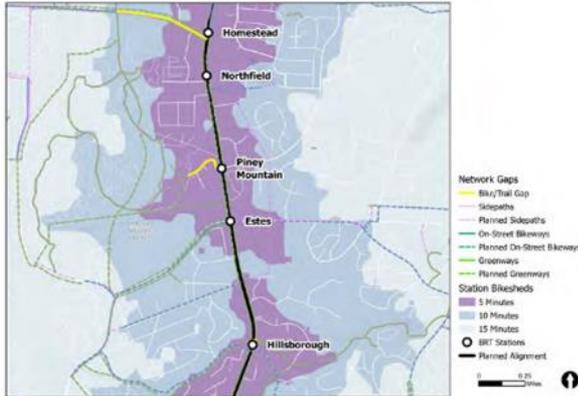
**SRF** Bike Network Gaps - North MLK  
Chapel Hill Transit Oriented Development

Bike Network Gaps- MLK North



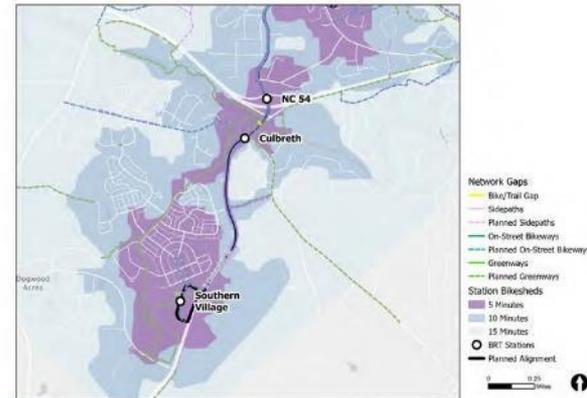
**SRF** Bike Network Gaps - Downtown  
Chapel Hill Transit Oriented Development

Bike Network Gaps- Downtown



**SRF** Bike Network Gaps - South MLK  
Chapel Hill Transit Oriented Development

Bike Network Gaps- MLK North and South



**SRF** Bike Network Gaps - 15-501  
Chapel Hill Transit Oriented Development

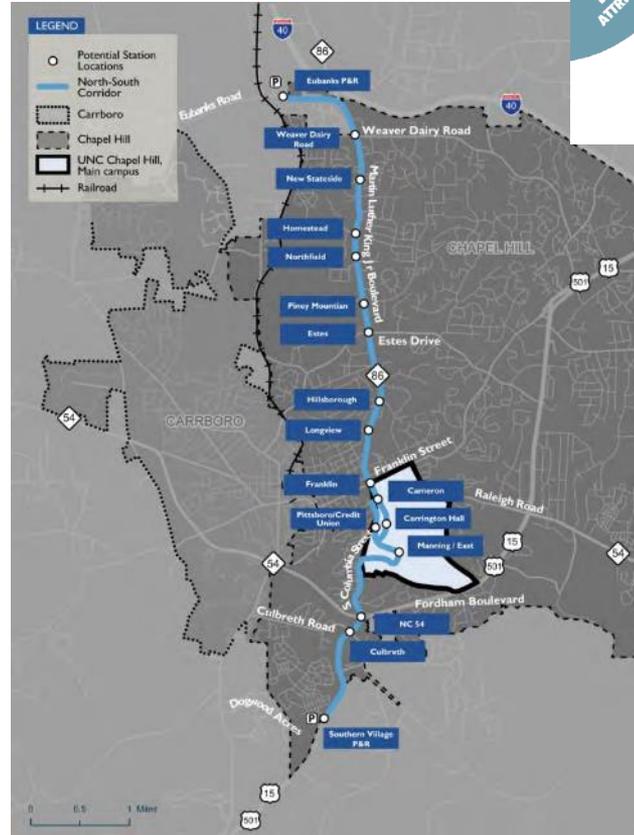
Bike Network Gaps- South Columbia

# Importance of Equitable Investments

- Promote fairness in mobility and accessibility for ALL community members.
- Support community goals: inclusive, sustainable and competitive community and “Complete Community”
- Accessibly designed streets: wider sidewalks, enhanced curbs and intersections, enhanced signaling
- Complete Streets: walking, bicycling, transit use, mobility devices or driving - improving health and safety
- Development occurring in transit-served locations can benefit all Chapel Hill residents



- FRIENDLY TO CHILDREN AND SENIORS
- MITIGATE CLIMATE RISKS: GREEN INFRASTRUCTURE
- WALKABLE
- HUMAN-SCALE
- ORIENTED TO ACTIVE TRANSPORTATION AND TRANSIT
- IDENTIFIABLE & DISTINCT
- EVERYWHERE TO EVERYWHERE GREENWAYS
- WATERSHEDS AS PEDESTRIAN AND CYCLING CONNECTORS



# Role of Transportation Equity Analysis

## TOD Accessibility Analysis Context

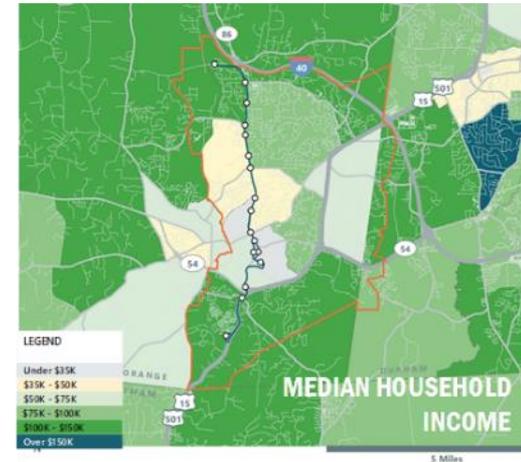
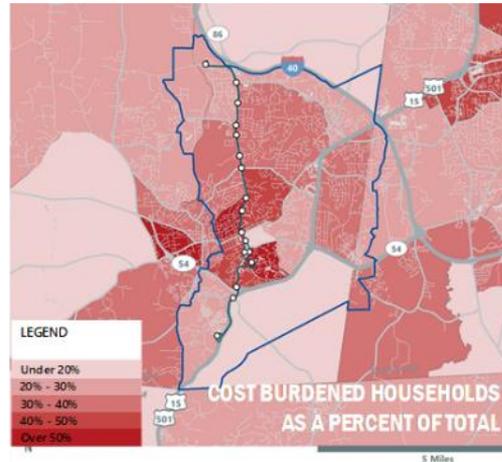
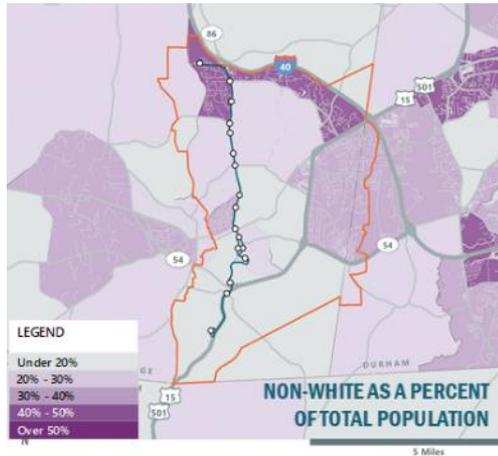
- Existing conditions along N-S BRT Corridor station areas and Focus Areas
- Reviewing studies addressing Mobility and Accessibility
- Walking + Biking + Rolling Audits with stakeholders and interested residents –gaps/barriers, safety
- Accessibility Recommendations for Station Areas and Focus Areas and infrastructure features

## Equity Overlay

- Advance racial equity, community wealth building, climate resilience and public health goals
- Transportation Equity can support more vibrant, prosperous, and resilient neighborhoods connected to opportunities
- Mobility/infrastructure to build capacity, and future policies to support equitable projects and developments.

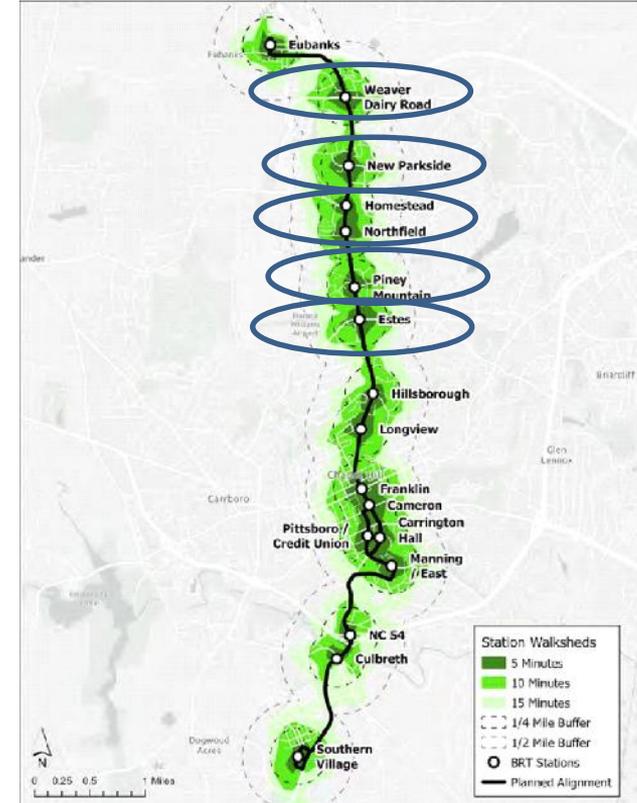
# Strategies for Equitable Investments

- Improve pedestrian infrastructure in TOD Station Areas
- ADA inventory of sidewalk infrastructure with an equity lens
- Transit signage and wayfinding: people with disabilities, non-English first language
- Increase micro-mobility options, bike-share and e-bikes
- Prioritize high-quality bicycle infrastructure
- Enhancing First and Last-Mile Connections to Transit
- Include an equity analysis to benefits and burdens of future investment.



# Equity Priority Station Area Improvements

- ❑ Gaps, barrier types, demographics, cost burden analysis, median income data.
- ❑ Populations with greater needs, or preferences for bicycling and walking, including “last mile” trips to access transit.
- ❑ Locations with lower incomes and rates of vehicle ownership – indicating transit, bike and pedestrian need.



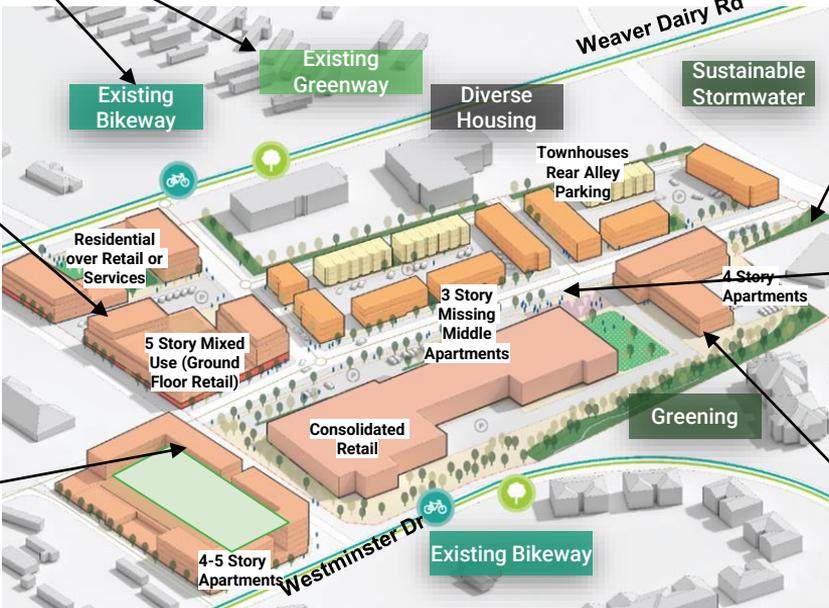
Priority Accessibility Locations—  
based on equity

# STATION AREA CONCEPT UPDATES

- **Scale Comparisons**
- **In-Progress Eye Level Views**

# Potential Site: Timberlyne Mall A Sustainable Mixed-Use Community

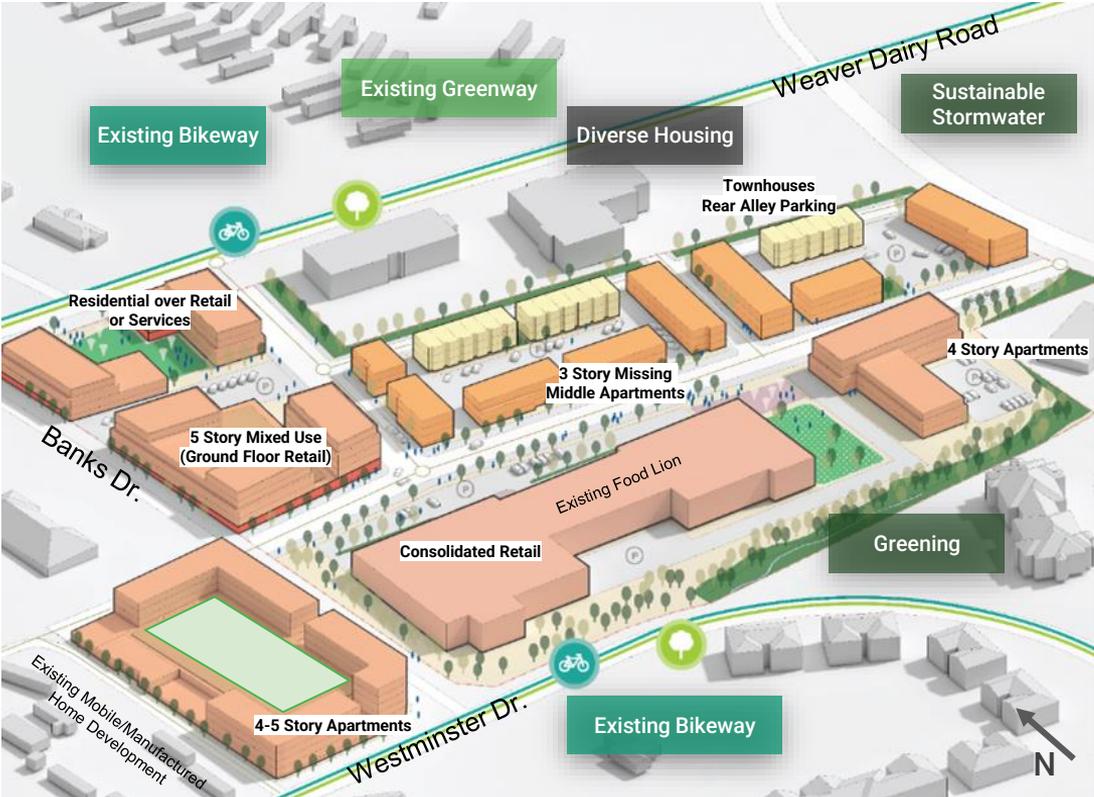
## Weaver Dairy TOD



← To Martin Luther-King JR. BLVD

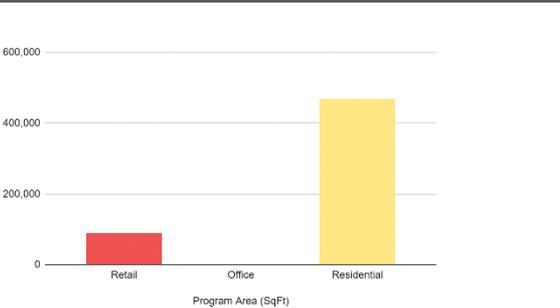
# Potential Site: Timberlyne Mall

## Weaver Dairy TOD



Potential change by 2040: illustrating principles, testing capacity

### Use Mix (Approx)



Residential Units: 340-360

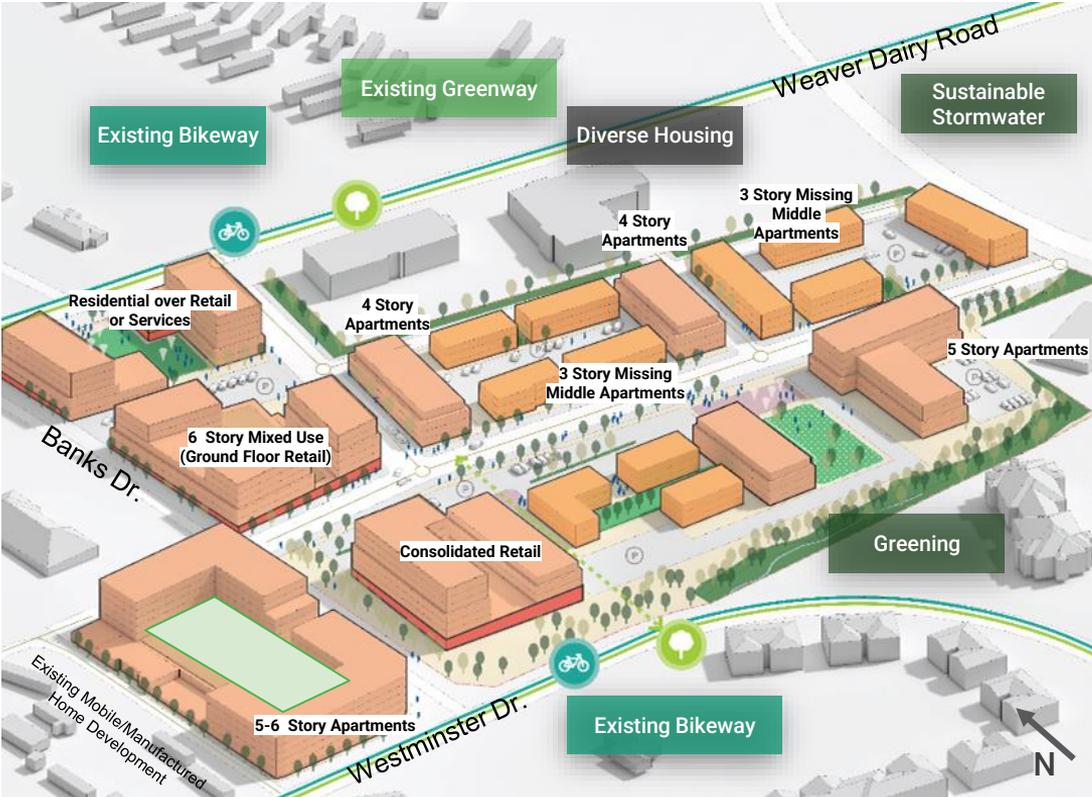
Retail / Mixed Use GFA: 50-55,000 sq ft

DU/Acre: 20-30



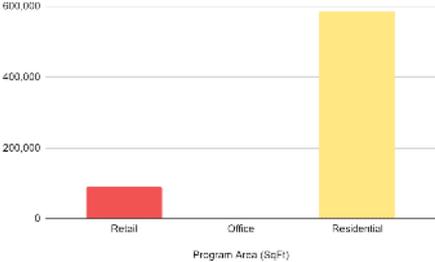
# Potential Site: Timberlyne Mall A Sustainable Mixed-Use Community

## Weaver Dairy TOD



Potential change by 2040: illustrating principles, testing capacity

### Use Mix (Approx): Enhanced Outputs



Residential Units: 470-490

Retail / Mixed Use GFA: 50-55,000 sq ft

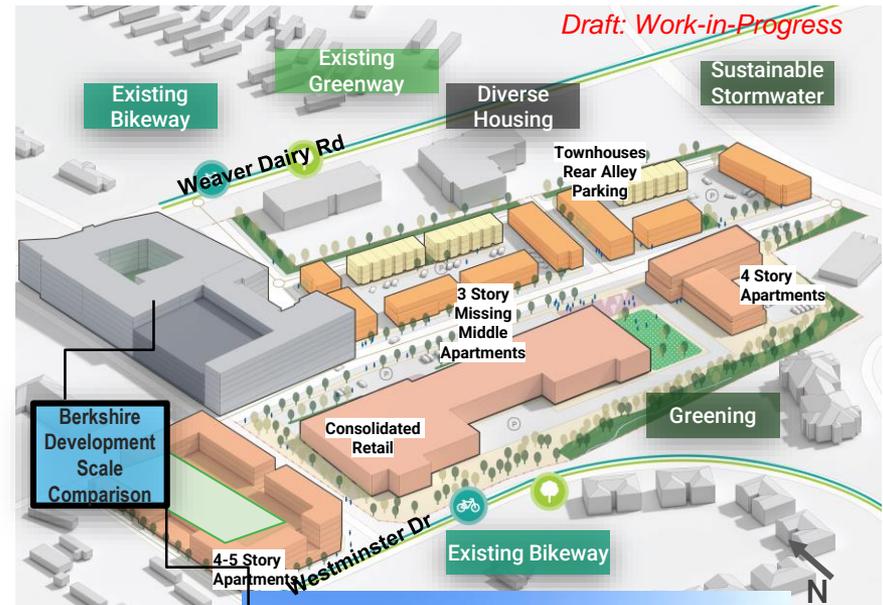
DU/Acre: 30-40



# DEVELOPMENT SCALE COMPARISON

## Potential Site: **Timberlyne Mall**

Weaver Dairy TOD



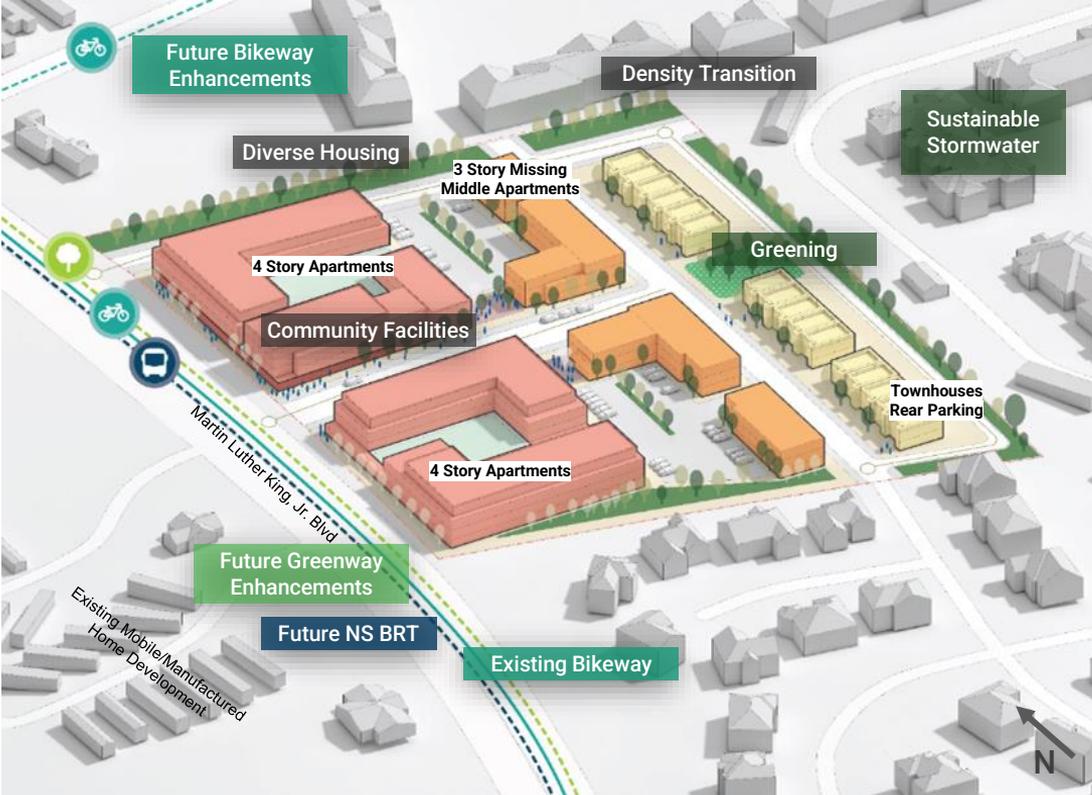
← To Martin Luther-King JR. BLVD

- Varied, human-scaled blocks and buildings
- Porous, walkable grid
- Diverse building and housing types
- Height and density transitions



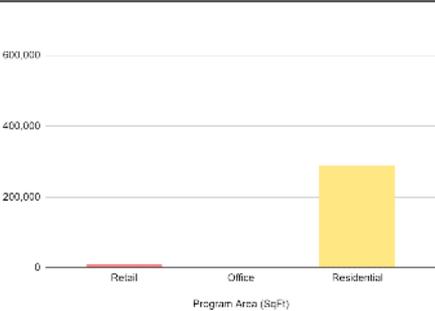
# Potential Site: MLK and Westminster Drive

## Weaver Dairy/New Stateside TOD



Potential change by 2040: illustrating principles, testing capacity

### Use Mix (Approx)



Residential Units: 200-220

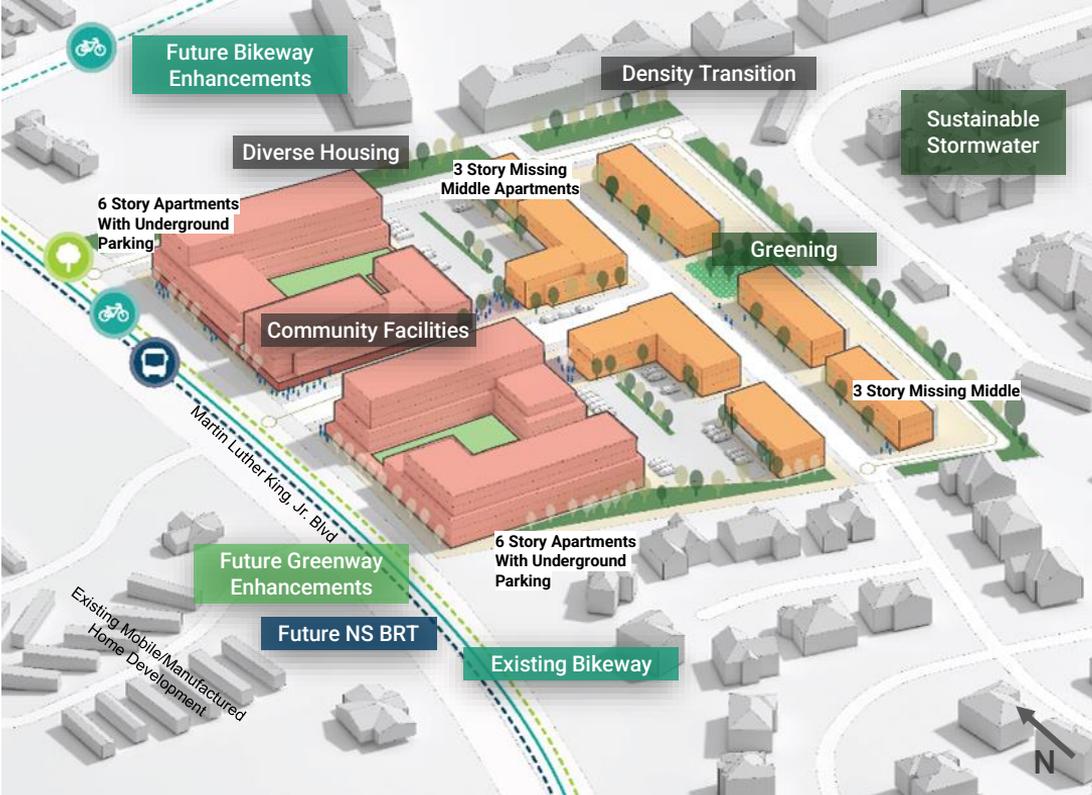
Retail / Mixed Use GFA: 8-10,000 sq ft

DU/Acre: 20-25 Approx



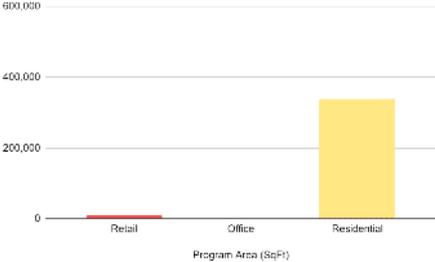
# Potential Site: MLK and Westminster Drive 2

## Weaver Dairy/New Stateside TOD



Potential change by 2040: illustrating principles, testing capacity

### Use Mix (Approx): Enhanced Outputs



Residential Units: 260-280

Retail / Mixed Use GFA: 8-10,000 sq ft

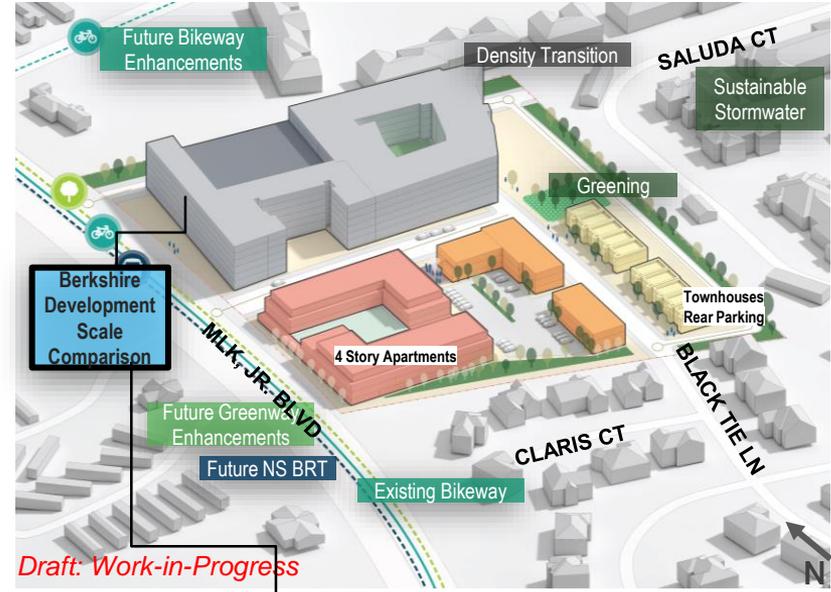
DU/Acre: 25-30 Approx



# DEVELOPMENT SCALE COMPARISON

## Potential Site: **MLK and Westminster Drive**

Weaver Dairy/New Stateside TOD



- Varied, human-scaled blocks and buildings
- Porous, walkable grid
- Diverse building and housing types
- Height and density transitions



Weaver Dairy TOD



Timberlyne Mall Today



# Timberlyne Mall Future

Weaver Dairy/New Stateside TOD

**Martin Luther-King Jr Blvd / Westminster Drive  
Future**

Weaver Dairy/New Stateside TOD



**Martin Luther-King Jr Blvd / Westminster Drive  
Today**

# Complete Community Design Elements

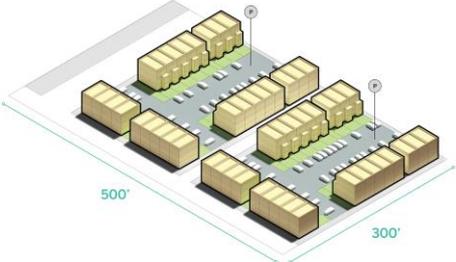
- Complete Streets provide safe and comfortable routes to BRT stations and E2E greenway network
- Station area and streets connected to adjoining neighborhoods
- Transition and distribute building mass through smaller, connected buildings
- Buildings bound and define public outdoor spaces
- Human-scaled, active uses on ground floor of building frontages
- Vertical and horizontal exterior articulation breaks up monolithic buildings
- Minimal building setbacks create engaging street edges
- Greenery fully integrated into site design (street trees, medians, bioswales, public lawns, etc.)



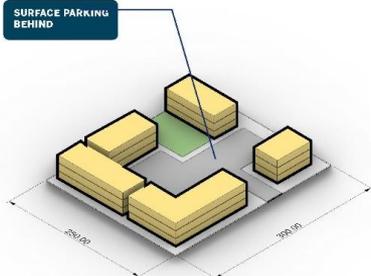
# DEVELOPMENT TYPOLOGIES

# Residential Typologies

## 3 Story Townhouse

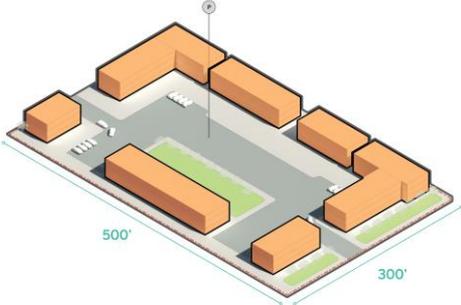


## 2 – 3 Story Missing Middle Apartment

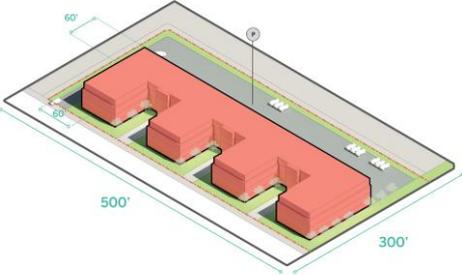


# Residential Typologies

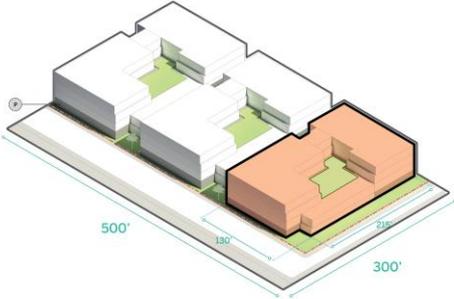
### 2 – 3 Story Missing Middle Apartment



### 4 Story Apartment w/ Rear Parking

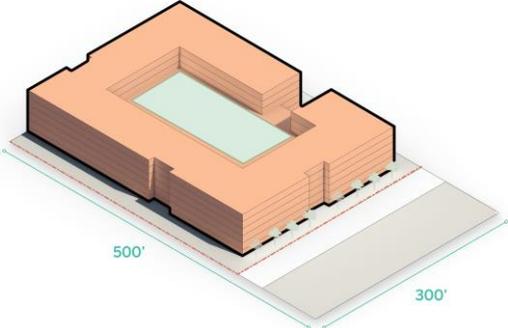


### 4 – 5 Story Podium Apartment

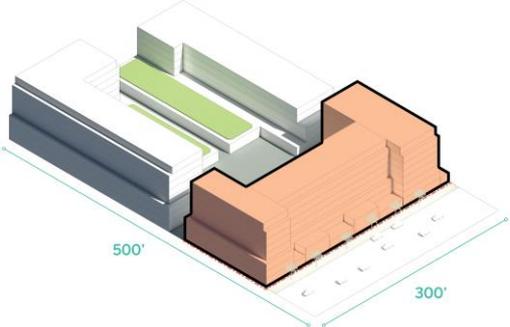


# Residential and Mixed-Use Typologies

## 6-8 Story Wrap-around Apartment

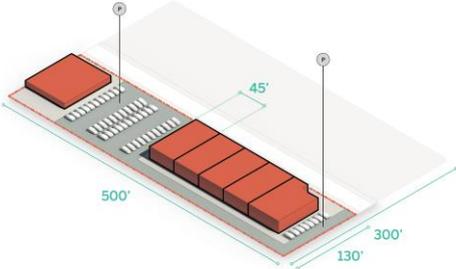


## 8 Story Mixed Use Apartment

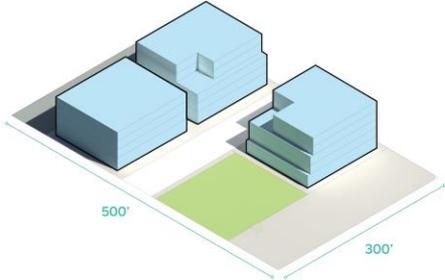


# Retail and Office Typologies

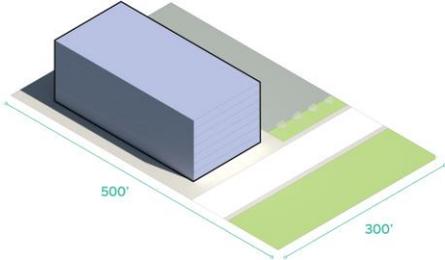
## Corridor Retail



## 6 Story Office



## 8 Story Office



# DISPOSITION OF COMMENTS & FEEDBACK

# FOLLOW UP: Disposition of Council Member Comments & Feedback

DEFINITIONS & CLARIFICATIONS	DISPOSITION
<p><b>Relationship of the TOD Plan to the LUMO Update and integration of TOD Plan with LUMO Update</b></p>	<p>Addressed in Slides 3-5</p>
<p><b>Missing Middle Housing</b></p>	<p>Human scaled housing that fills the gap between detached single-family homes and multiunit apartment buildings; includes duplexes (stacked or side-by-side); triplexes (stacked); fourplexes; courtyard buildings; courtyard cottages; townhomes; some forms of live-work buildings</p>
<p><b>Station area planning: the TOD “Gold Standard”</b></p>	<p><b>Station area planning demonstrates TOD potential and establishes an expectation for the highest caliber development at every station area.</b>            Successful TOD delivers more than “development near transit. Great TOD raises the bar on design, economic development, placemaking, sustainability, and housing affordability in station areas.</p>
<p><b>Conceptual representations of buildings are too big, monolithic, and generic</b></p>	<p>Building representations in the station area concepts are intentionally generic; we are working on visualizations to better visualize scale as compared to other buildings in Chapel Hill</p>
<p><b>Replace “buffer” with “transition” to highlight blending and connecting instead of separating</b></p>	<p>In progress</p>
<p><b>Describe apartments using terms that include ownership models (ex. condos)</b></p>	<p>In progress</p>
<p><b>Use appropriate language to describe type and use of public realm in station areas</b></p>	<p>In progress</p>

# FOLLOW UP: Disposition of Council Member Comments & Feedback

KEY MESSAGING	DISPOSITION
<p>The TOD Plan does not advance a zero-sum scenario (i.e., denser development in lieu of land preservation)</p>	<p>All key messaging will be integrated into the final TOD Strategy &amp; Implementation Plan</p>
<p>The TOD plan does not propose redevelopment of existing single-family neighborhoods, but these neighborhoods are still part of the greater community fabric and need to contribute to increased housing supply (ADUs, etc.)</p>	
<p>Confirm how TOD station areas contribute to a Complete Community</p>	
<p>Explicitly define and describe the “why” of TOD Planning: integrating land use planning and transit service to generate excellent placemaking throughout the corridor</p>	
<p>Clearly communicate that the goal of TOD Planning is supporting great land use and placemaking in station areas and along the corridor</p>	
GRAPHICS	DISPOSITION
<p>Label streets, buildings, landmarks</p>	<p>In progress</p>
<p>Provide more context for photographs and conceptual renderings</p>	<p>In progress</p>
<p>Use photographs to tell a story/ better support concept</p>	<p>In progress</p>
<p>Include street view graphics/renderings</p>	<p>In progress (selected locations)</p>

# FOLLOW UP: Disposition of Council Member Comments & Feedback

COMMENT OR FEEDBACK	NOTES
<b>Growth &amp; Development</b>	
<b>Direct higher density/intensity growth and development to TOD corridor</b>	TOD plan highlights infill development opportunities in station areas
<b>Include realistic development assumptions and scenarios</b>	Station area concepts are based on expert market analysis and key informant interviews
<b>Focus on development in nodes, not the whole corridor</b>	TOD plan focuses on station areas as development nodes
<b>Ensure adopted TOD station area concepts aren't "binding"</b>	Concepts in the TOD plan are aspirational, not regulatory
<b>Include higher density conceptual scenarios for TOD station areas</b>	A wider range of density scenarios has been incorporated into the TOD concepts
<b>Ensure station area concepts integrate recent housing studies and Complete Community framework</b>	All station area concepts contribute to the implementation of Complete Community
<b>Include a range of conceptual development capacities for station areas</b>	Updated station area concepts will include ranges for units/ square feet rather than absolute numbers
<b>Include a mix of uses at each station area</b>	Station area concepts show a market-feasible mix of uses
<b>Employ TOD best practices, based on staff and consultant expertise, for station area concepts</b>	Concepts and implementation recommendations have been revised based on this feedback
<b>Revise Timberlyne Mall station area concept to provide more options for current retail footprints</b>	Station area concept will be revised to show potential redevelopment of retail spaces

# FOLLOW UP: Disposition of Council Member Comments & Feedback

COMMENT OR FEEDBACK	DISPOSITION
<b>Growth &amp; Development (cont'd)</b>	
<b>Connect TOD Plan to a larger regional development context (i.e., Chatham Park)</b>	A comprehensive treatment of regional connections is beyond the scope of this plan but is captured in the comprehensive plan, FLUM, and local transportation and mobility plans
<b>Everywhere to Everywhere (E2E) Greenways</b>	
<b>Integrate E2E network into TOD plan and concepts</b>	Existing and future greenways are integrated in Focus Area overviews, Station Area concepts, and street level conceptual renderings
<b>Equity</b>	
<b>Equitably distribute benefits of public investment (i.e., community benefits and amenities)</b>	Goals and policy commitment established in TOD plan
<b>Include implementation strategies preserving and promoting diverse, affordable housing options in TOD Station Areas</b>	TOD Plan includes recommendations for promoting and preserving affordable housing
<b>Preserve and promote local businesses</b>	TOD Plan includes policy and program recommendations promoting and preserving small, local, and minority- or woman-owned businesses
<b>Include anti-displacement codes and regulations</b>	The TOD Plan deliberately centers equity; this principle is reflected in the station area concepts and recommendations

# COUNCIL GROUPS: Feedback & Follow Up

COMMENT OR FEEDBACK	DISPOSITION
<b>Exceptional Public Realm</b>	
<b>Balance desire for parks/ open space with TOD goals/ scale of station area planning; AND Smaller scale public spaces like pocket greens or public lawns at station areas</b>	TOD station area concepts integrate greenways and appropriately-scaled public spaces like pocket parks and vibrant public plazas
<b>Show connections from station areas to Town open space and parks</b>	The TOD plan illustrates connections to community parks/open spaces in Focus Areas
<b>Define the features and characteristics of the public realm in station areas</b>	High-level development and design principles are reflected in the station area concepts
<b>Park &amp; Ride Redevelopment Potential</b>	
<b>Interest in exploring redevelopment opportunities for Eubanks Road P&amp;R and Southern Village P&amp;R and ensuring capacity for future Chatham Park riders</b>	Staff will determine eligibility and requirements for FTA joint development programs