TOD Planning & UDO Visioning

SHAPING OUR FUTURE

DRAFT IMPLEMENTATION STRATEGIES

December 6-7, 2022

CHAPEL HILL

Draft

SOM ORION PLANNING+DESIGN OPD neighboring concepts SRF SBFRIEDMAN

Draft Implementation Strategies Discussion

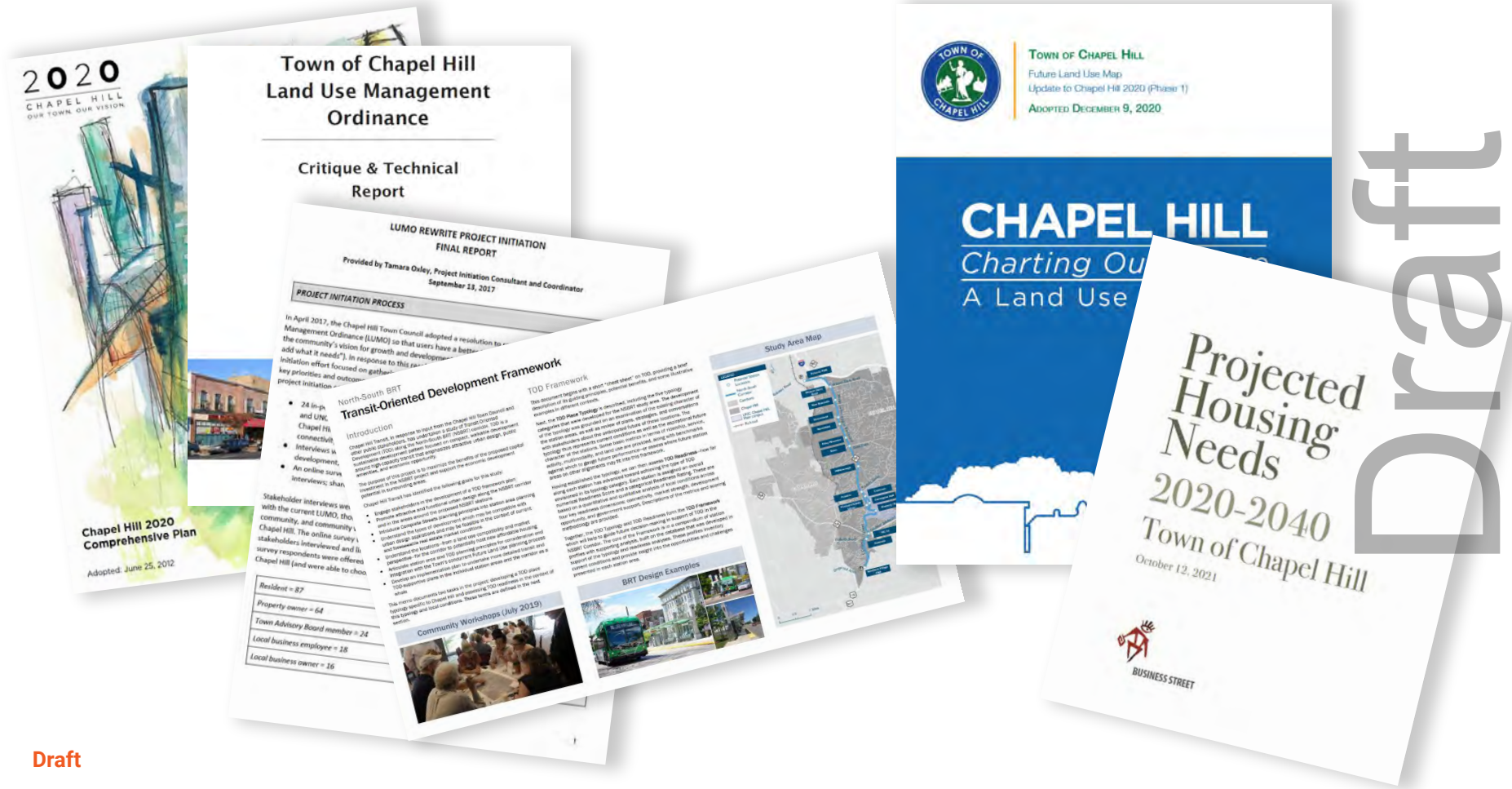
1. LUMO Audit update and emerging recommendations
2. Housing forecasts and affordable housing strategies
3. Office, retail and hotel forecasts and strategies
4. Accessibility and equity strategies

Implementation Strategies Overview

For Discussion

Draft

CHAPEL HILL PLANNING: 2012-2020



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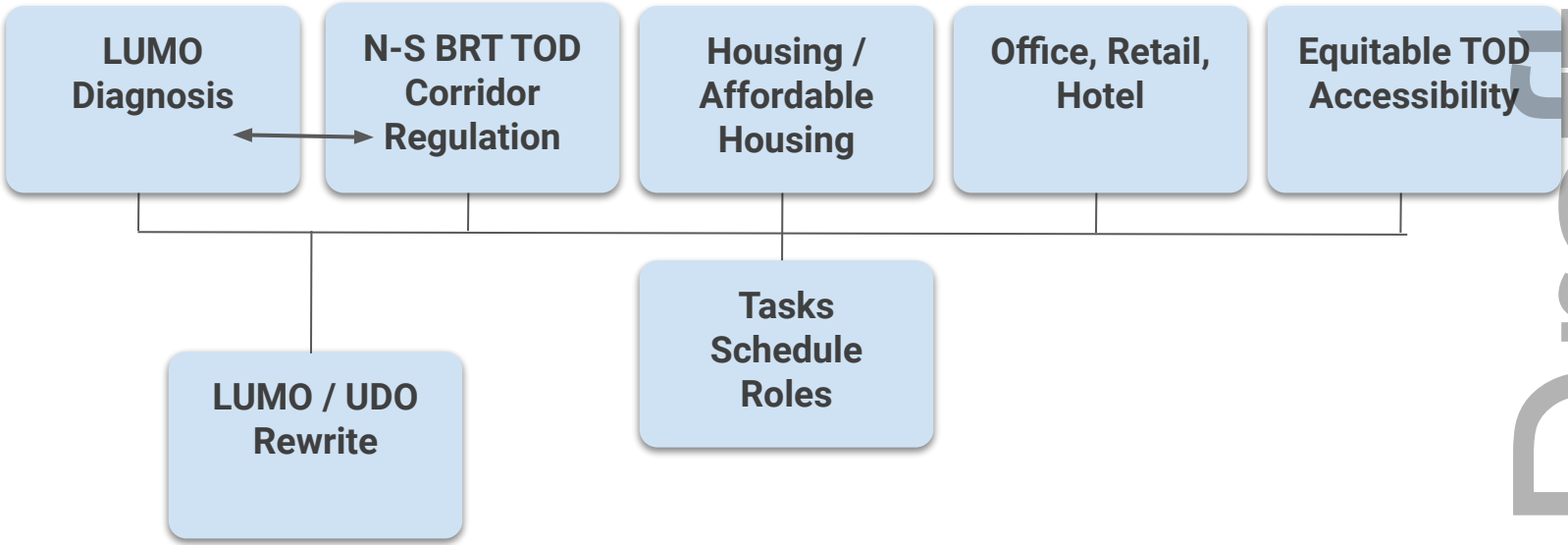
N-S BRT TOD Context

- Town has big picture values and goals
  - Equitable housing and development
  - Equitable mobility and accessibility
- Goal is to Raise FTA Project Rating Score
  - Land-use, Economic Development criteria
- FTA is seeking
  - Implementation techniques and mechanisms
  - Appropriate transit supportive policies and regulatory mechanisms

Implementation Strategy: Key Components



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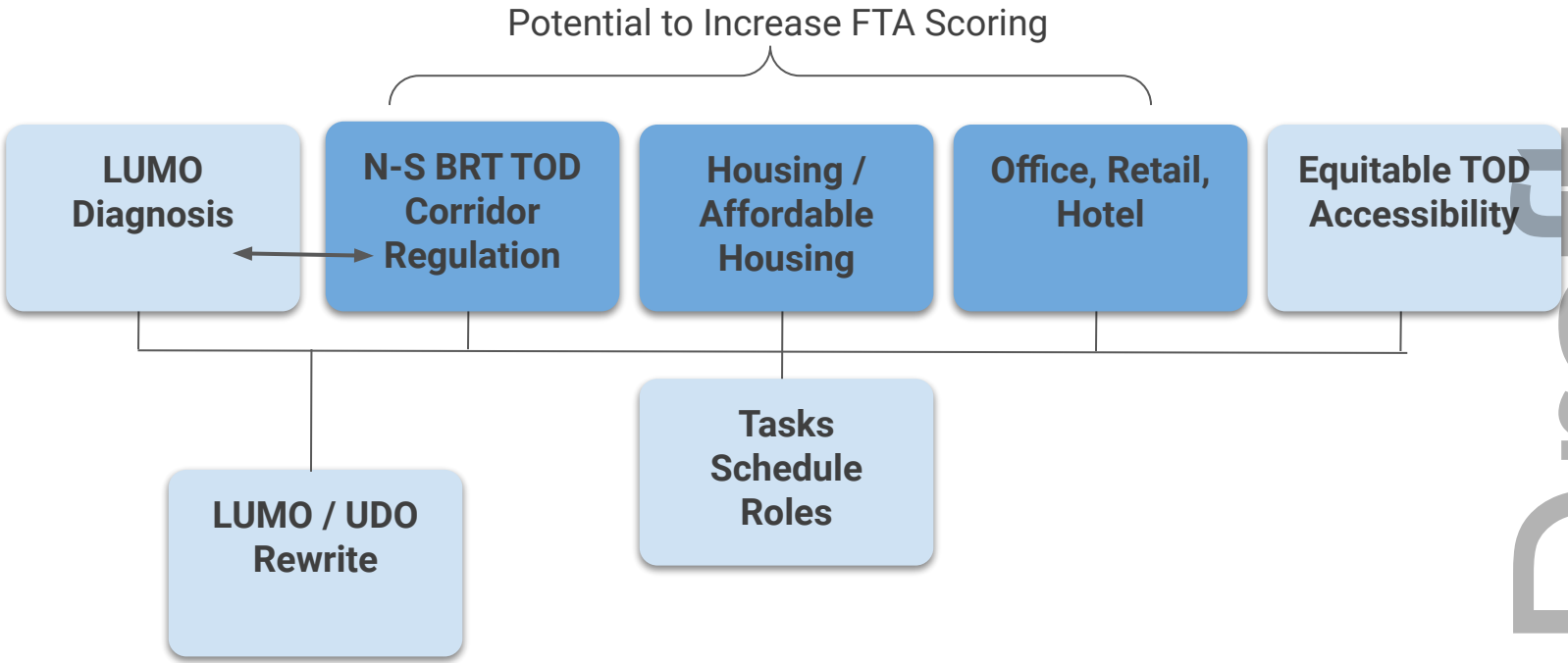
Implementation Strategy: Key Components



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Draft Implementation Strategies Discussion

1. **LUMO Audit update and emerging recommendations**
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LUMO Audit Update

For Discussion

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UDO Visioning-Code Diagnostic Memo: Purpose

- Comprehensive analysis: plans, LUMO, codes, land use tools
- Staff, stakeholder, community engagement
- Identify best practices
- Explain how the UDO can be improved overall
- TOD and Focus Area zoning options and recommendations
- Outline options for LUMO rewrite
- Set direction for re-write (2023-24)

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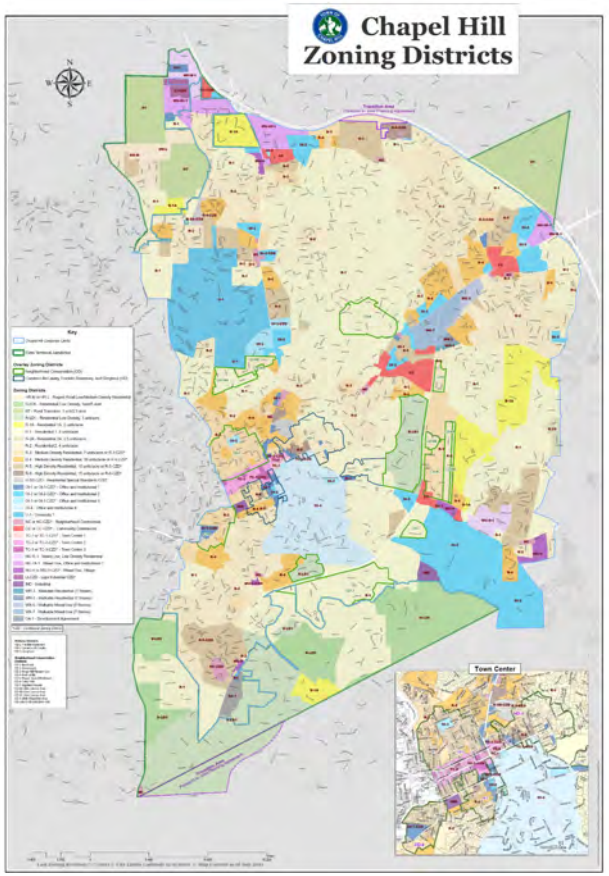
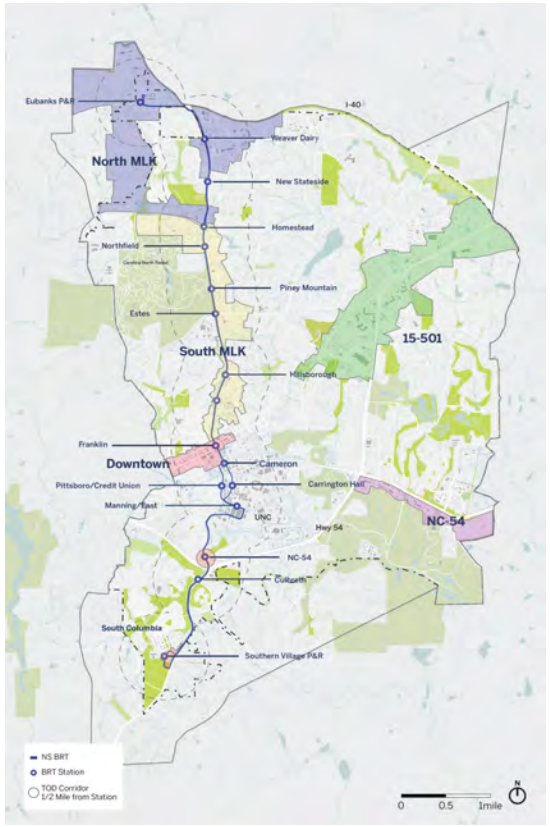
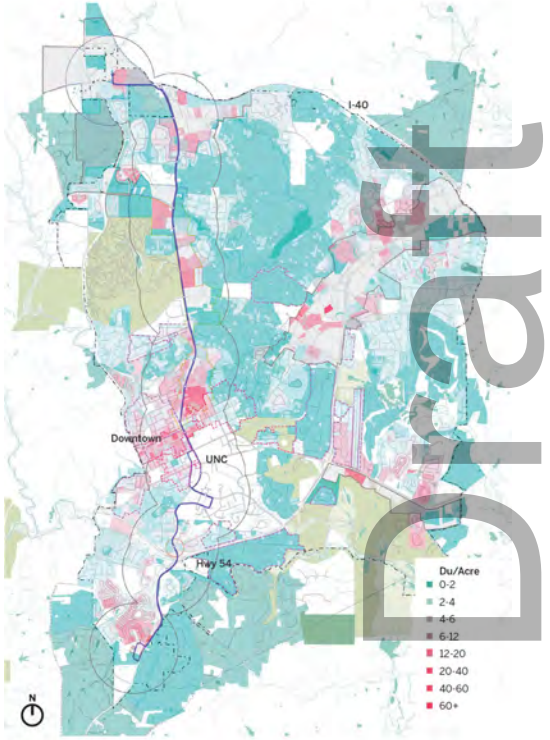
LUMO Diagnosis: Zoning, TOD and Focus Areas, Current Densities







Density (DU/Acre)

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LUMO Diagnosis: Engagement to Date

- Scoping meetings
  - Planning, Building and Development, Enforcement, Town Attorney, Town Managers
- Town staff interviews: staff about content, process, and perception
- Survey: internal LUMO users - Staff, Advisory Boards, Council
- Survey: external LUMO users - Developers, Representatives, Design Community
- Benchmark NC municipalities: zoning approach, process, staffing, timing
- Stakeholder roundtables with internal and external LUMO users:
  - Development Community, Applicant Representatives, Architects and Engineers, Environmental Groups, Large Landowners, Realtors, Town Staff, Advisory Committee Representatives

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LUMO Diagnosis: Comprehensive Plan and the LUMO

- Wide ranging and aspirational Comprehensive Plan
- Lacks prioritization needed to steer LUMO administration

- 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
- Update required to:
  - Reflect FLUM update (2020) Focus Area heights and building typologies
  - Achieve North-South BRT TOD objectives
  - Achieve Complete Communities objectives
  - Reflect best practices in land use guidance and regulations

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LUMO Diagnosis: Decision-Making Process

- Survey respondent concerns:
  - Predictability, consistency, flexibility, clarity, and efficiency

- 20,000-sq.ft. land disturbance for design review is a low threshold
- Zoning and development review and engagement has lengthy process
- Multiple advisory boards, confusion over formal/legal vs. advisory status
- Review processes are linear, little concurrent review or coordination

- Conditional zoning used too often: absence of standards, conditions unpredictable
- Administration of concept plans has become onerous and expensive

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LUMO Diagnosis: Content

- Antiquated uses and structure: missing contemporary range of uses and definitions

- Residential densities generally low across districts
- Suburban approach to dimensions: lot sizes, setbacks, frontages
- Disconnects between density and height regulations
- Absence of design standards to provide predictability and consistency

- Few incentives for desired development types or community benefits
- Environmental, sustainability standards to be updated

- Fragmented structure hinders user navigation

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Emerging LUMO Recommendations

For Discussion, Review and Future Decision Making

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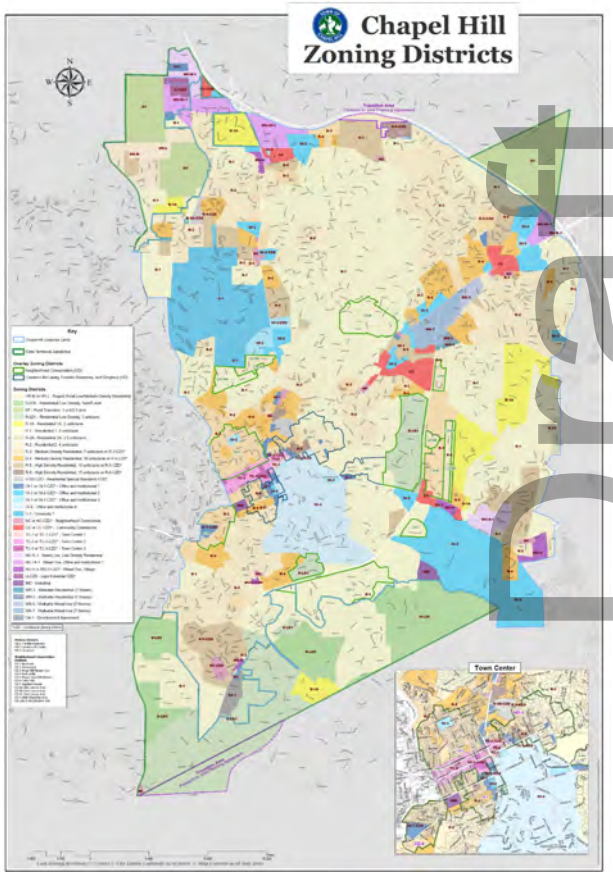
LUMO Recommendations: Potential Content Changes

- Consolidate use districts - fewer, more relevant
- Up-date use district standards and regulations
  - Set minimum densities across districts
  - Min and max setbacks
  - Parking locations and requirements
  - Walkable, bikeable, transit oriented forms
- Incentivize affordable housing and community benefits
  - Density bonuses
  - Reduced parking standards in TOD areas
  - Fee reduction or waivers



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LUMO Recommendations: Potential Use District Adjustments

- Existing zoning district palette is complex
- Many districts have similar standards - potential consolidation
- LUMO rewrite goal: identify where differentiation does not impact outcome, and consolidate

Zoning District	R-3	R-4	R-5	R-6	CC	N.C.	OI-1	OI-2
Lot Size (square feet min)	5,500	5,500	5,500	5,500	5,500	5,500	5,500	5,500
Density (units per acre max)	7	10	15	15	15	10	10	15
Frontage (min feet)	40	40	40	40	40	40	40	40
Lot Width (min feet)	50	50	50	50	50	40	50	40
Building Height, Setback (max feet)	29	34	39	39	34	34	29	34
Building Height, Core (max feet)	60	60	60	60	60	60	60	60
Street Setback (min feet)	24	22	20	20	22	24	24	22
Interior Setback (min feet)	8	8	6	6	8	8	8	8
Solar Setback (min feet)	11	9	8	8	9	11	11	9
Impervious Surface Ratio (max)*	.5/.7	.5/.7	.5/.7	.5/.7	.5/.7	.5/.7	.5/.7	.5/.7
Floor Area Ratio (Max)	0.162	0.23	0.303	0.303	0.429	0.264	0.264	0.264
Street Setback (max feet)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

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N-S BRT TOD Possible Zoning strategies

For Discussion, Review and Future Decision Making

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LUMO TOD Diagnosis: Achieving N-S BRT Transit Oriented Development

- Multiple use districts across the N-S BRT Corridor
- Multiple use districts within individual station areas
- Generally with densities below TOD best practices
- Most relevant zoning districts:
  - Mixed-Use Villages (arterial, connector)
  - R4, R-5, R-6
- Wider LUMO issues apply within N-S BRT Corridor
  - Densities, heights, lot sizes, setbacks, frontages
  - Incentives for affordable housing, community benefits

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LUMO TOD Options: Achieving N-S BRT Transit Oriented Development

1. **Modify and Apply Existing Use Districts**
   - Mixed-Use Villages (arterial, connector)
   - Town Center
   - R4, R-5, R-6
2. **Create New stand alone TOD Use District(s)**
   - Town Center / Downtown TOD
   - Campus / Institution TOD
   - TOD Hub (housing, retail, services, office, institution)
   - Corridor (housing, local retail, local services)
3. **Create TOD Overlay Incorporating Incentives**
   - Existing zoning limits near term applicability - integrate into LUMO rewrite.

To Update

- Uses, use-mix
- Densities, heights
- Massing
- Setbacks
- Frontages
- Parking

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LUMO rewrite options and next steps

For Discussion, Review and Future Decision Making

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Possible Future LUMO Re-write: Approaches

Method	Pros	Cons	Examples
Targeted Focus on priority content issues.	Focus and speed	Overall clarity / internal conflicts not unresolved	Works best where code is updated frequently
Sequential 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
Comprehensive Complete overhaul: organization/structure, content, administration, review, and approval processes	Holistic review of land development standards, incentives, processes -, basis for unified development ordinance (UDO)	Lengthy process (two years), significant public engagement, support and training for staff, stakeholders, and elected officials	Raleigh, North Carolina Missoula, Montana.

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Resource Appendix

Possible Existing Use District TOD Modifications

LUMO TOD Options: Possible Existing Use-Districts to Apply

- Mixed-use districts (MU-OI-1, MU-R-1, and MU-V/MU-V-CZD)
  - Policy restricting expansion of MU-OI-1, MU-R-1 districts [3.5.1(a)] may need to be revisited
- Selected Residential (R-5 and R-6), Residential Conditional R-SS-CZD
- Town Center (TC-1, TC-2, TC-3)

TOD Station/Focus Area	Existing Zoning Supporting TOD (with modifications)
MLK North	MU-OI-1, MU-V/MU-V-CZD (C, A, and L), R-5, R-6
MLK South	R-5, R-6
Downtown	R-5, R-6, R-SS-CZD, TC-1/TC-1-CZD, TC-2/TC-2-CZD, TC-3/TC-3-CZD
South Columbia	R-5, MU-V-CZD (C, A, and L
15-501	MU-R-1, MU-V-CZD (C, A, and L)
NC-54	R-5, MU-OI-1, MU-R-1

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Potential TOD Modifications:
MU-V/MU-V-CZD; collector and arterial

- Increase density:
  - By-right, residential density - collector and arterial contexts
  - Increase FAR
  - Density bonus incentives for affordable units, parking reductions, connection to transit stop
- Reduce parking
  - Lowering parking space requirements (from current 50% of the standard)
  - Add parking maximum
- Frontages: set minimum build- to and max setbacks
- Reconcile impervious surface ratios and LID treatments
- Increase tree canopy retention
- Integrate TOD streetscape, connectivity, safety design standards

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Potential TOD Modifications:
Mixed-use Residential (MU-R-1)

- Adjust mixed-use ratios and minimum requirements for non-residential uses
- Address heights:
  - Set min and max heights
  - Address primary and secondary structure heights
- Reduce parking area setback requirements (from 75 feet)
- Reduce parking
  - Lowering parking space requirements (from current 80% of the standard)
  - Add parking maximum

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Potential TOD Modifications:
Mixed-use Office/Institution (MU-OI-1)

- Review Perimeter setbacks (50 feet from street, interior)
- Adjust mixed-use ratios, increase minimum requirements for non-residential uses
- Address heights:
  - Set min and max heights
  - Address primary and secondary structure heights
- Reduce parking area setback requirements (from 75 feet)
- Reduce parking
  - Lowering parking space requirements (from current 80% of the standard)
  - Add parking maximum

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Potential TOD Modifications:
Town Center 1, 2, and 3

- Consolidation – Town Center (TC) with additional individual height subdistricts
- Increase FAR - above 2 minimum for TC-1 and TC-2
- Consider adding density minimums
- Consider density bonus incentives when affordable units exceed existing minimum set-aside (10%)
- Integrate TOD streetscape, connectivity, safety design standards

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Potential TOD Modifications:
Residential (R) 5, 6

- Consider density increase to 15-20 DU/AC when district located along corridor
- Increase FAR (above 1 minimum)
- Increase core height allowance
- Reduce minimum street setbacks
- Add maximum setback

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Internal Survey Overview: Participants

- 7 planning staff and related departments
- 5 administrators
- 5 planning board members
- 1 Advisory Board member
- 1 Board of Adjustment member
- 4 Town Council members

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Internal Survey: Key Takeaways

- More than half of the staff respondents struggle with timely reviews
- The three highest-rated factors: process, staff capacity, timing of groups other than staff in the public process
- At least 50% of Staff and Town Council respondents felt decisions took too long
- 50% of the Planning Board respondents felt review took appropriate amount of time.
- None felt decisions were made too quickly
- 50% of Town Council respondents felt it is too much regulation
- 40% of staff felt it is too much regulation
- 40% of staff and Planning Board felt the LUMO is an appropriate level of regulation
- Single area of agreement among 50% of respondents: LUMO protects existing neighborhoods
- High levels of disagreement on other LUMO topics

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Internal Surevy Key Takeaways: ranking characteristics of a code:

- Town Council ranked **consistency** the highest (very high)
- Planning Board ranked **clarity** the highest
- The administrator group ranked **predictability** the highest
- Administrator group ranked **efficiency** the highest
- Staff ranked **community support** the highest
- Town Council ranked **efficiency** the lowest
- Town Council ranked **community support** the lowest
- Town Council and Planning Board ranked **predictability** the lowest
- Staff and the administrator group ranked **clarity** the lowest
- The administrator group ranked **consistency** lowest (very low)

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External Stakeholders: Survey Overview

- 24 total
- 3 residents
- 2 design professionals
- 7 builders/developers
- 6 community/interest group members
- 3 small business owners
- 3 other (downtown partnership, affordable housing developer, informed resident)

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External Survey: Key Takeaways

- More than 80% felt it took too long to reach a conclusion on a permit/decision.
- None felt it was too fast or an appropriate amount of time
- The three highest-rated factors for lengthy reviews:
  - Process
  - Rules and standards
  - Timing of groups in the public process
-

- 31% felt the LUMO represented too much regulation
- 50% thought it was an appropriate amount.
- Areas cited cited as causing the most conflict or misunderstanding (Q16):
  - Some future planning maps
  - Length of time it takes to update
  - Poor definitions
  - Stormwater management
  - Dimensional standards (density, floor area ratio, setbacks)
  - Inclusionary zoning
  - Zoning districts
  - Setbacks and lot minimums
  - Rezoning
  - Special use permits

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External Survey: Key Takeaways

- Equal percentages felt staff “interprets the code too much” vs. “interprets a reasonable amount” (Q17)
- The three highest rated roles of the LUMO were (Q18):
  - To enable people to build housing and businesses that serve the needs of the community
  - To support a strong business environment
  - To protect the land, air, and water from damage or pollution
- Respondents felt the code needs to be, in order:
  - Predictable, efficient, clear, consistent, supported by the community
- When asked to rate the LUMO on these factors, respondents nearly uniformly rated it poor (Q20)
- The planning issues that caused the most concern were (Q21):
  - Housing affordability, housing choice, lack of pedestrian facilities

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External Stakeholder Roundtable Discussions

Process

- If everything is a priority, is anything a priority?
- Can't rely on plans because everything is a discussion/negotiation
- Perceived goal is process rather than outcome
- Length of time and level of uncertainty stifles development
- More by-right development should be allowed
- Concept plan process is well-intended but requires too much up front
- Need concurrent reviews with fewer committee meetings

Content

- LUMO needs to be explicit and clear
- There are things in the ordinance that aren't standards but could be
- There are standards in the ordinance that don't make sense
- There are standards that aren't standards because they're changeable
- Rethink, revise, and/or remove the 20,000 sq. ft. review trigger

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Benchmark Survey Overview

Respondents

- 12 total
- Representation from:
    - City of Asheville
    - City of Charlotte
    - Town of Kernersville
    - City of Wilson
    - City of Wilmington
    - Durham City/County
    - Orange County

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Takeaways

- All respondents have a unified development ordinance (UDO)

- Over 80% of respondents' codes include form-based districts and elements
- 2/3 of respondents feel these districts successfully implement plan elements

- All or nearly all codes are online, as either a PDF or in HTML with search functionality
    - 1/3 of respondents use Municode
    - 1/3 of respondents self-host
    - 1/3 are using an alternative (Code Publishing Company or CodeHUB)

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Benchmarking Takeaways

- All respondents have an online application process for permits and allow online/digital reviews and approvals
- Most conditional rezonings and all special use permits take between 2-4 months, on average, to reach a decision
- 2/3 of respondents use a technical advisory committee at some point in the process
- 1/3 include an expedited review process in exchange for community benefits
- All respondents' codes regulate accessory dwelling units
- 1/3 regulate distributed energy, 5G wireless facilities, EV charging spaces

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HOUSING DEMAND FORECAST

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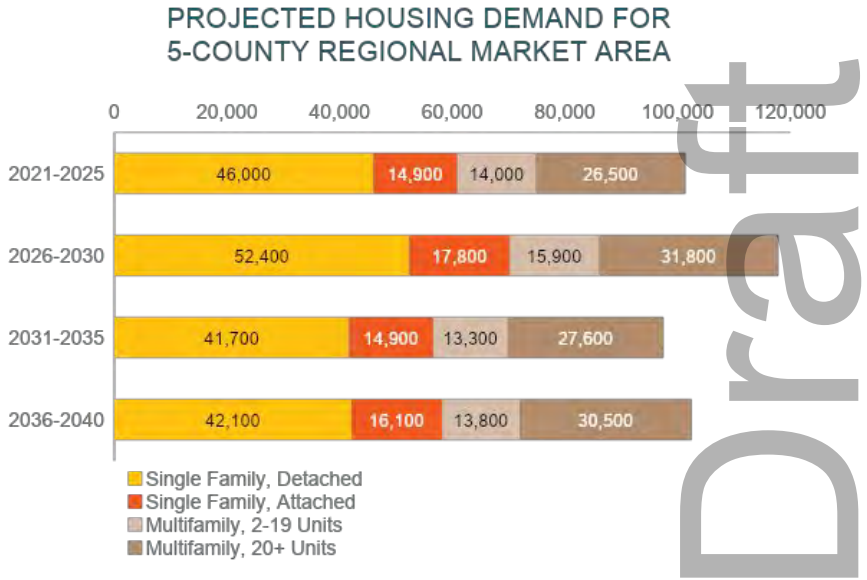
MARKET AREA HOUSING DEMAND

Significant production is needed to accommodate growth in the market area

- 5-County market area needs to build ±20,800 units per year.
- Demand for ±6,000 "missing middle" housing units per year.
- Single family homes will make up a large part, but diminishing share of new housing supply
- New product should reflect evolving household composition and preferences:
  - More attached housing accessible to new homebuyers
  - Alternative housing for baby boomers and seniors seeking to downsize and age in place
  - Housing to accommodate growth in multigenerational households and desire for rental single-family homes



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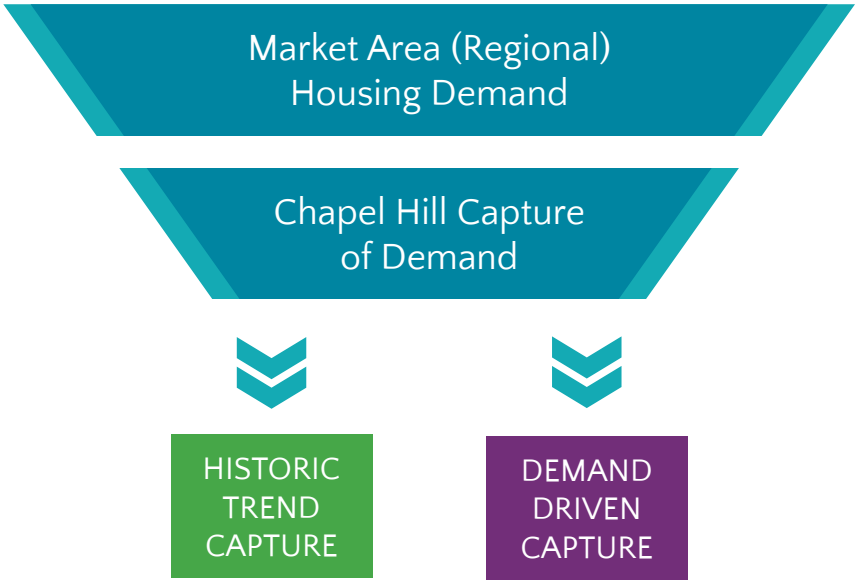
CHAPEL HILL CAPTURE OF HOUSING DEMAND

Recent efforts could position Chapel Hill for an increased capture of demand



Several efforts could increase the Town's capture of regional housing demand:

- A market response to the historic undersupply of housing via the many projects currently in the pipeline
- Opportunities within the TOD & Focus Areas to increase density
- Proactive affordable housing production within the Town
- A streamlined entitlement process, which would reduce some of the barriers to development
- Use of publicly-owned land for housing, particularly in transit-rich areas
- The complete communities planning process

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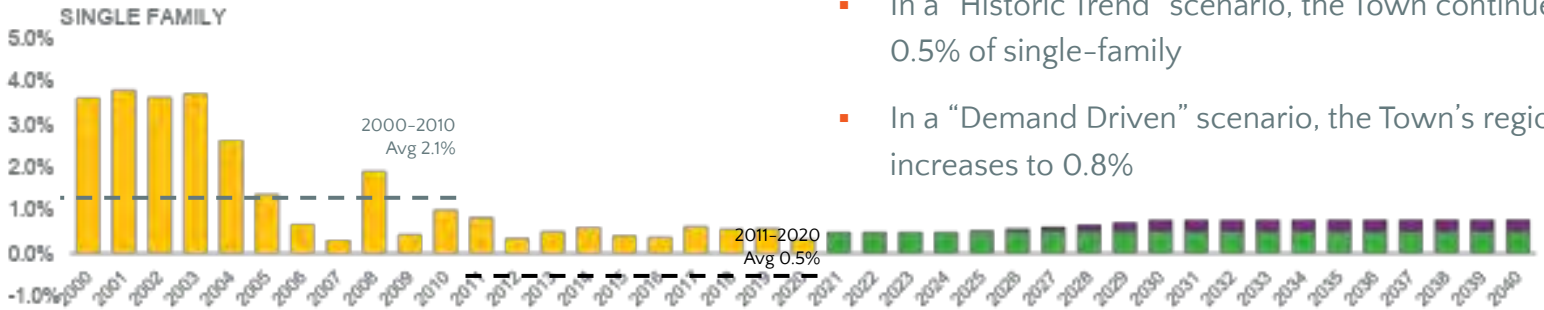
CHAPEL HILL CAPTURE OF HOUSING DEMAND

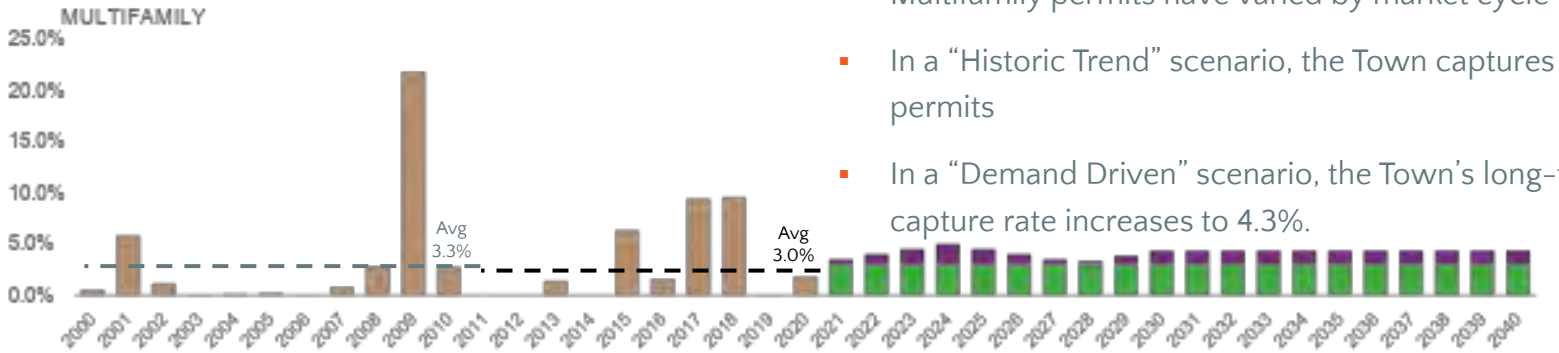
2011-2020: 0.5% of single-family permits & 3.0% of multifamily units

TOWN CAPTURE 5-COUNTY PERMITS



- In a "Historic Trend" scenario, the Town continues to capture 0.5% of single-family
- In a "Demand Driven" scenario, the Town's regional capture rate increases to 0.8%

Demand Driven
Historic Trend



- Multifamily permits have varied by market cycle
- In a "Historic Trend" scenario, the Town captures 3.0% of multifamily permits
- In a "Demand Driven" scenario, the Town's long-term regional capture rate increases to 4.3%.

Demand Driven
Historic Trend

Source: Decennial Census, SB Friedman, US Census Building Permits Survey

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CHAPEL HILL CAPTURE OF HOUSING DEMAND

Chapel Hill could capture 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

- 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)

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CHAPEL HILL CAPTURE OF HOUSING DEMAND

New housing product should be accessible to all income cohorts

- 25% of new units would be needed for net new households earning below 60% AMI
- 29% for households earning 60-120% AMI
- 47% for households earning above 120% AMI.
- Chapel Hill's recent housing production has been heavily weighted to higher price points.
- Deliberate efforts needed to increase supply of new housing for low- and moderate- income households.
- A diversity of housing product at different price points will help increase affordability.
- Chapel Hill: estimated current unmet need of 3,280 homes for households earning less than 60% AMI
- The majority of these units (60-70%) are for non-student households.

REGIONAL NEW HOUSING DEMAND DISTRIBUTION, 2021-2040

	Affordable <60% AMI	Workforce and Mid-Range Market Rate 60-120% AMI	Higher-Price Market Rate 120%+ AMI
Owner-Occupied	11%	22%	66%
Renter-Occupied	39%	35%	26%
Total	25%	29%	47%

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[1] AMI categories correspond roughly to 2019 AMI levels for a four-person household ($84,800 = 100% AMI).
Source: SB Friedman

CHAPEL HILL NET ENTITLED PIPELINE

3,498 net entitled homes are projected to generate 3,125 homes

- Residential projects take 3-4 years on average to reach completion following entitlement.
- Of the 2,262 net residential units entitled 2013-2017, 1,896 units (84%) were built within five years of being entitled.
- 3,125 units will be built in the next five years.
- Uncertainties about near-term deliveries can relate to the following:
  - Development program no longer makes financial sense
  - Project gets postponed by the developer
  - Developers ultimately build less than the maximum
  - Later phases get delayed or produce fewer units

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
Net Units in Pipeline	94	214	148	3,042	3,498
	DEVELOPMENT UNCERTAINTY		DEVELOPMENT UNCERTAINTY		
SBF Pipeline Projection	88	192	133	2,712	3,125

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[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

Long-term, more projects will need to be entitled to meet housing demand

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

- In 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

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

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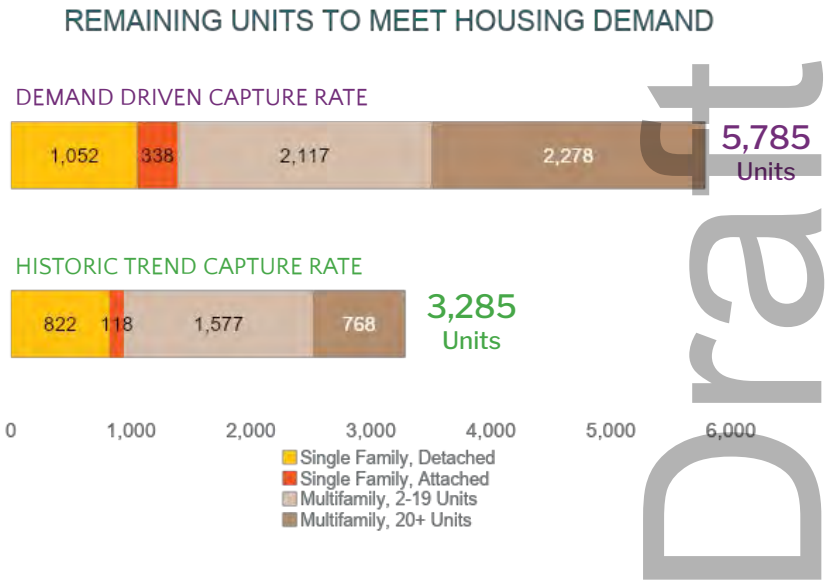
Source: SB Friedman, Town of Chapel Hill

HOUSING DEMAND 2040 – NET OF PIPELINE

- Demand Driven higher share of regional housing production:
  - More diverse housing opportunities for local residents and people in workforce;
  - The Town will reduce the upward price pressure;
  - More high-quality places can be created: TOD density is linked to increased viability of resident services and a quality public realm; and
  - The Town will take a step towards meeting the Town's Guiding Principles (FLUM).
- If Chapel Hill continues to capture its historic rate of housing:
  - Falling share of the regional population
  - Housing will likely become less affordable for low- to moderate-income households;
  - Competition will likely increase between students and long-term residents over lower cost housing.



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POTENTIAL DEVELOPMENT STRATEGIES

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POTENTIAL DEVELOPMENT STRATEGIES

Strategies to facilitate equitable growth and development

There are additional strategies that Chapel Hill could consider to support market-rate and commercial development. These development strategies will be assessed and implemented with a focus on equity. Recommendations are currently under review and should be further vetted by Town staff and Council.

RESIDENTIAL STRATEGIES	Expand and Diversify the Supply of Housing	Encourage Density in Areas Around Transit Add More Residential Downtown Work with UNC to Expand Student Housing Options
OFFICE STRATEGIES	Attract and Retain Office Users	Continue Corporate Attraction & Retention Efforts Cluster Office Development Capture Commercialization from UNC-Based Incubators
RETAIL STRATEGIES	Support and Expand the Town's Retail Base	Activate Ground Floor at Key Locations Encourage Retail that Reflects Community Needs or Emerging Typologies Support Local Small & Minority-Owned Businesses
DOWNTOWN STRATEGIES	Increase Vibrancy of Downtown Chapel Hill	Increase Service and Retail Offerings Provide Support and Incentives to address High Visibility Vacancies Expand Shared Parking Solutions

Draft

POTENTIAL AFFORDABLE HOUSING TOOLKIT

Draft

POTENTIAL DEVELOPMENT STRATEGIES
Residential

Encourage Density in Areas Around Transit

- Continue facilitating residential development around the proposed BRT stations – reducing housing and transportation costs.
- A diversity of housing is required to meet different age, life stage and income needs.
- Encourage a variety of residential typologies and tenures, while also supporting greater affordable housing production.

Add More Residential Downtown

- This area will benefit from N-S BRT improvements
- Encourage market segments beyond student housing
- Leverage proximity to jobs, transit and retail

Work with UNC to Expand Housing Options

- Encourage workforce and affordable housing underutilized UNC land holdings.
- Explore public-private partnerships to build investment-grade mixed-use residential projects.

Draft

TRANSIT & AFFORDABLE HOUSING

Affordable housing near transit reduces two largest expenditures for most households

- Almost 60% of renter households in Chapel Hill are cost-burdened.
- The North-South BRT and TOD work along the Corridor is an opportunity to address ongoing affordability challenges experienced in Chapel Hill.
- Affordable housing and transit reduce housing and transportation costs.
- Savings can increase spending on good and services, plan for large or unexpected expenses, and/or build household wealth.
- TOD programs, policies and strategies could be extended Town-wide

CHAPEL HILL COST BURDENED HOUSEHOLDS

OWNER HOUSEHOLDS

19%
Owner Households Cost Burdened

RENTER HOUSEHOLDS

58%
Renter Households Cost Burdened

HOUSEHOLDS EARNING <$35K

89%
Households Earning <$35K Cost Burdened

Draft

Source: ACS 2020 5-Year Estimates, American Public Transportation Association, HUD, National Association of Realtors

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
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

Source: Town of Chapel Hill

Draft

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
PLANNING & REGULATION	▪ Reviewing expedited review process for affordable housing projects
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.

Draft

Source: Town of Chapel Hill

POTENTIAL HOUSING TOOLKIT – FOR REVIEW

Protect, expand, diversify and promote affordability

HOUSING DEVELOPMENT	Expand Affordable Housing Supply	Developer Outreach Strategic Disposition Strategic Acquisition
HOUSING PROGRAMS	Maintain or Expand Access to Affordable Housing	Revolving Loan Fund
FUNDING MECHANISMS	Establish or Expand Funding Sources for Affordable Housing	Increased Affordable Housing Development Reserve Affordable Housing Bonds Tax Increment Financing Direct Impact Investments
PLANNING & REGULATION	Protect Affordability	Comprehensive Affordable Housing Plan Expanded Community Land Bank Tenant Right of First Refusal
ZONING POLICIES	Increase Supply of Affordable Units and Protect Existing Units	Procedural Changes Code-Based Incentives By-Right Gentle Density in Neighborhoods

Draft

POTENTIAL HOUSING TOOLKIT

Housing Development

Developer Outreach

- Reintroduce Chapel Hill to the regional housing development community
- Connecting developers, funders, and service providers.
- Identifying local affordable or missing middle developers, promoting opportunities, and incentives.

Strategic Disposition

- Explores partnerships with UNC and UNC Health
- Explore partnerships with churches and nonprofits
- Town leading requests for proposals (RFP) that require a preferred type of development - affordable, senior, or missing middle

Strategic Acquisition

- Town acquisition of sites in the Station and Focus Areas
- Long-term preservation of any NOAH units acquired
- RFP process

Draft

POTENTIAL HOUSING TOOLKIT
Housing Programs

Revolving Loan Fund

- **Naturally Occurring Affordable Housing (NOAH) Preservation.**
  - Property owners and/or renters rent or property tax increase mitigation
  - Acquisition of NOAH projects for long-term preservation (Durham and Wake County examples)

- **Property Rehabilitation.**
  - Financing tool for major property improvements, including ADU construction or accessibility improvements.
  - Rehab of older properties
  - Greensboro- low-interest owner loans rehabilitation, and landlords for rental housing improvements.

- **New Affordable Housing Construction.**
  - Bridge loans for affordable housing developers.
  - Finance land acquisition, repaid via tax credits or other project financing.

- **Homeownership Assistance.**
  - Additional gap financing for purchasers
  - To more effectively expand homeownership, RLF paired with community land bank strategy.

Draft

POTENTIAL HOUSING TOOLKIT
Funding Mechanisms

Increased Affordable Housing Development Reserve
- Increase Affordable Housing Development Reserve allocation

Affordable Housing Bonds
- Additional bond – beyond 2018 $10 million bond

Tax Increment Financing
- (TIF, often called project development financing in North Carolina)
- Support for housing for people of low or moderate income is an authorized use of TIF revenues in North Carolina
- Perceived complexity, statutory limitations, and availability of alternative types of project financing have limited use
- State law limits the amount of a jurisdiction's land area placed in a TIF to 5% max.

Direct Impact Investments
- Potential sources: large employers, financial institutions, philanthropic foundations.

Draft

POTENTIAL HOUSING TOOLKIT
Planning & Regulation

Comprehensive Affordable Housing Plan
- Building on: *Housing Needs and Market Assessment* (2017), *Affordable Housing Gap and Economic Analysis* (2017), *Projected Housing Needs, 2020-2040* (2021), N-S TOD planning study
- Undertake a comprehensive affordable housing planning effort

Expanded Community Land Bank
- Build on Northside Neighborhood Initiative land bank funded via $10M loan from UNC
- Northside land bank could be expanded
- A new land bank could be established
- Town led inventory of vacant property / with funds to acquire and prepare parcels – addressing TOD Station and Focus Areas

Tenant Right Of First Refusal
- Explore allowing tenant right of first refusal where NOAH properties are subject to redevelopment where allowed by state law
- Potential to negotiate as part of project rezoning agreements (Glen Lennox example)

Draft

POTENTIAL HOUSING TOOLKIT
Zoning Policies

Procedural Changes
- Piloting an expedited review process for affordable housing projects
- Increasing the threshold that triggers the Town Council review processes to levels comparable with other municipalities.

Code-Based Incentives for Afforable Housing
- Reduced parking requirements
- Height and density variances
- Option to link to TOD Station areas or specific zoning districts

By-Right Gentle Density in Neighborhoods
- Introduce duplexes, triplexes, or small multifamily buildings in single family only districts
- (Durham example).

Draft

Draft Implementation Strategies Discussion

1. LUMO Audit update and emerging recommendations
2. Housing forecasts and affordable housing strategies
3. Office, retail and hotel forecasts and strategies
4. Accessibility and equity strategies

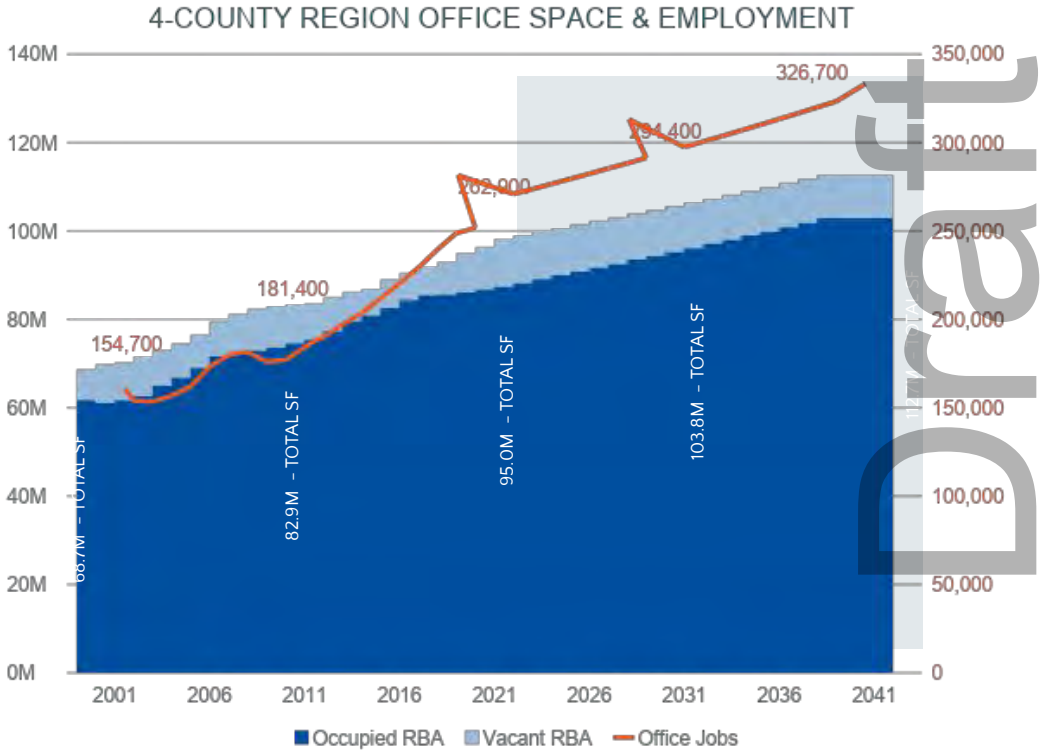
OFFICE CHARACTERISTICS & DEMAND FORECAST

Draft

REGIONAL OFFICE FORECAST

4-County Region will need to add 17.7M net SF by 2040

- Accounting for the trends in space needs, the 4-County region will need to add approximately net 17.7M SF of office space by 2040 to accommodate the growth in office job sectors and maintain a controlled level of vacancy.
- Some existing, older office space will be demolished. To account for demolitions, the region will need to add approximately 21.6M SF of gross office space.
- About 15.3M SF of the gross office space (71%) should be larger space suitable for corporate users. The remaining 6.3M SF (29%) should be in smaller buildings more suitable for professional users (e.g., dentists, lawyers).
- New office space should reflect evolving user preferences:
  - More flexible layouts, with high-quality building amenities
  - Largely positioned in walkable, mixed-use environments



Source: CoStar, Emsi, SB Friedman

SB Friedman Development Advisors

Draft

CHAPEL HILL CAPTURE OF OFFICE DEMAND

Chapel Hill can capture a greater share of new office development

The 4-County region has been competitive in attracting and keeping national companies

Lower Cost of Living

The Raleigh-Durham metro area's cost of living is below the national average, and housing costs are lower than in most peer metros.

Highly Educated, Young Talent Pool

Benefitting from the presence of multiple major universities, the region has a large and quickly growing pool of young, college-educated professionals

Diversified Economy

Multiple sectors, such as tech, healthcare and professional services, have a strong presence in the region, contributing to a dynamic economy

Low Personal & Corporate Income Tax Rates

North Carolina has low personal and corporate tax rates, which attract national companies to the state

Recent trends & efforts position Chapel Hill for a greater capture of new office development in the region

Flight to Quality

Chapel Hill has newer, highly amenitized office space available with more space entitled

Walkable, Mixed-Use Environments

Chapel Hill has prioritized walkable, mixed-use development

Growth of Life Sciences

Chapel Hill is positioning itself to capture a portion of this growth & leverage the proximity to UNC

Innovation District

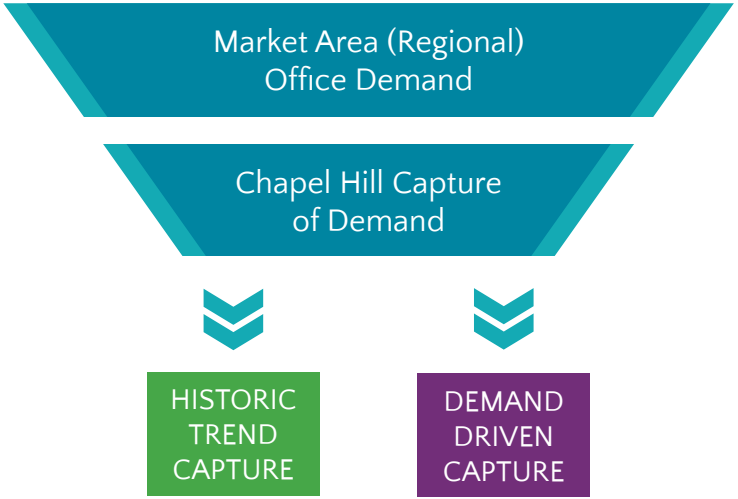
Chapel Hill is outlining a vision & strategy to develop an Innovation District downtown

Draft

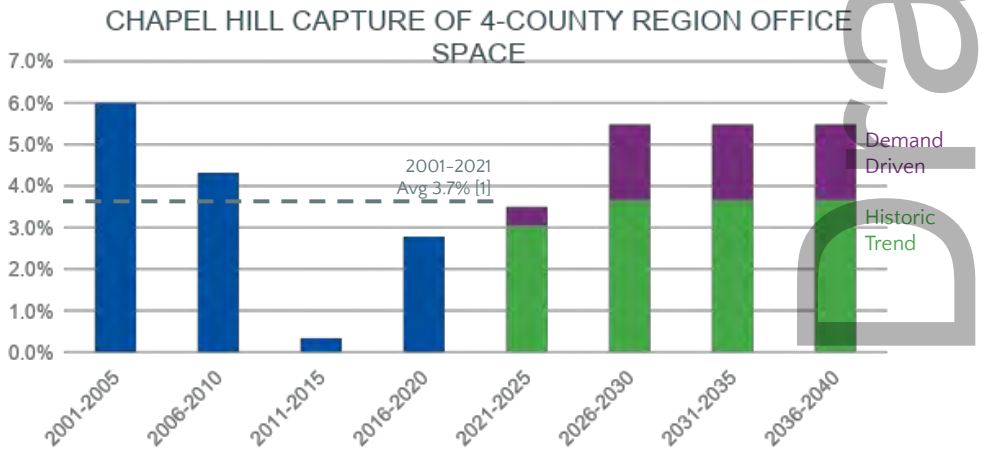
Source: JLL, SB Friedman

CHAPEL HILL CAPTURE OF OFFICE DEMAND

SB Friedman evaluated office demand under historic & enhanced capture rates



- Between 2001 and 2020, Chapel Hill captured 3.7% of the office space built in the region, on average.
- In the "Historic Trend" scenario, the Town continues to capture 3.7% of new office space built regionwide. In the "Demand Driven" scenario, the Town's regional capture rate gradually increases to 5.1%.



[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

Draft

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

- Under the "Historic Trend" scenario, 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

- In the "Demand Driven" scenario, Chapel Hill could support between 1.0M and 1.2M SF of new office through 2040.
- Relative to the "Historic Trend" scenario, a much larger share of space is in larger-scale corporate office buildings in the "Demand Driven" scenario.

Draft

Source: SB Friedman
SB Friedman Development Advisors

OFFICE STRATEGIES

Draft

POTENTIAL DEVELOPMENT STRATEGIES
Office

Continue Corporate Attraction & Retention Efforts
- Reverse Orange County's declining share of regional jobs
- Promote Town and County incentives
- Promote national and regional growth sectors: life sciences, engineering, and information technology
- Leverage proximity to UNC's research, facilities and talent pool.

Cluster Office Development
- Recognize demand for higher-quality, Class A space, which is leading to declining occupancy in older buildings.
- Leverage mixed use, walkable character which remain popular office locations
- Respond to desires for both downtown and campus environments
- Proactively identify areas with a concentration of older or vacant office buildings that would benefit from redevelopment

Capture Commercialization from UNC-Based Incubators
- Facilitate the downtown innovation district
- Proactively retaining commercial users that have been incubated locally by assisting with relocation efforts.

Draft

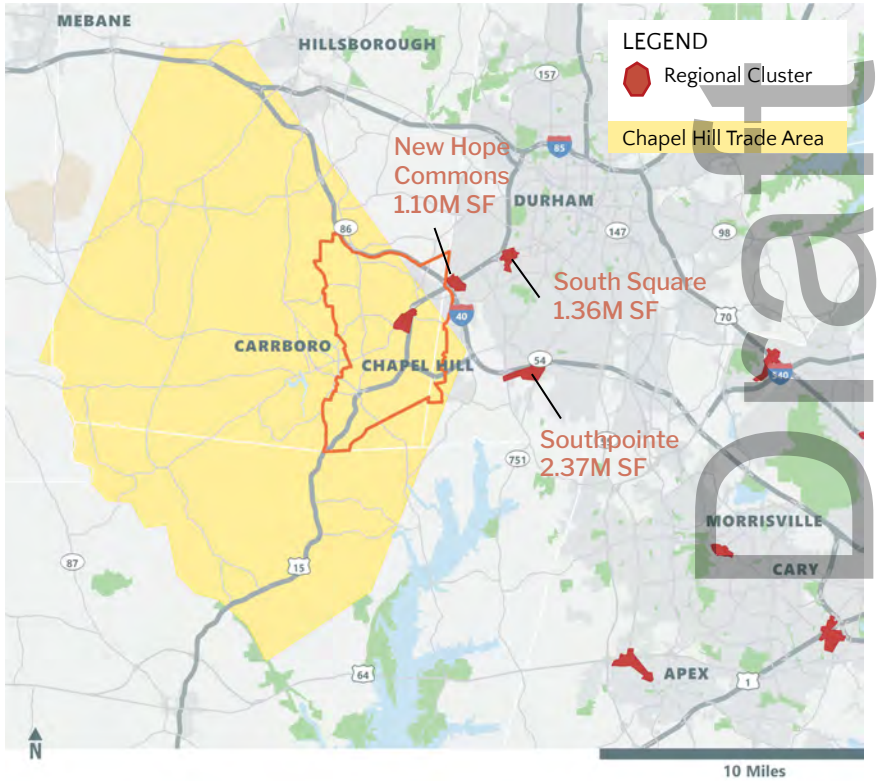
RETAIL CHARACTERISTICS & DEMAND FORECAST

Draft

RETAIL TRADE AREA

Primary Trade Area extends west from Chapel Hill

- To project demand, SB Friedman conducted an analysis of competitive retail clusters to delineate the geography from which Chapel Hill attracts most of its retail customers.
- Trade areas across the MSA were defined by the presence of a regional cluster: a concentration of over 1M SF of rentable retail space. Chapel Hill is home to one regional cluster, located along NC 15-501. This cluster encompasses both the University Place and Eastgate shopping centers.
- Other more community-serving retail is present throughout the region, but smaller retail nodes do not affect trade area boundaries.
- After clusters were identified, trade areas were drawn based on drive times and Thiessen polygons. The Chapel Hill Trade Area, presented to the right, covers most—but not all—of the Town, and extends into Orange and Chatham counties.



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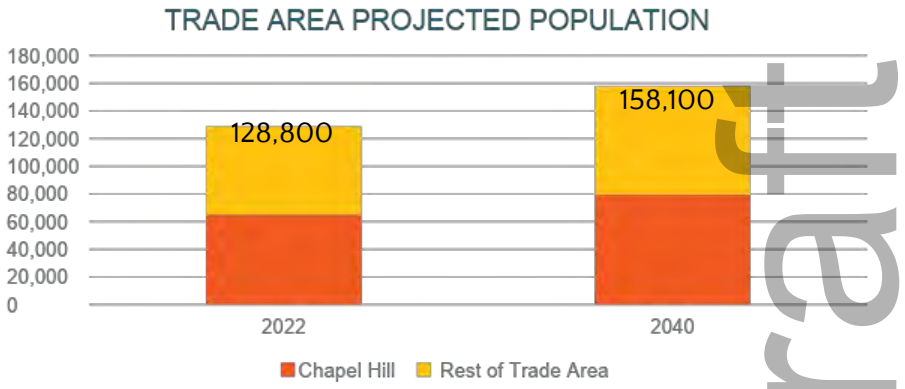
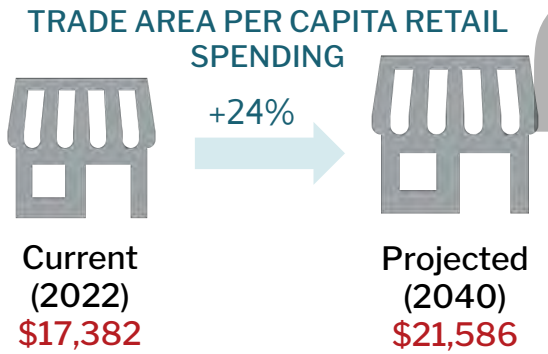
Source: Business Analyst, ESRI, SB Friedman

POPULATION GROWTH & RETAIL SPENDING

Primary Trade Area extends west from Chapel Hill

- The Chapel Hill trade area is home to 128,800 residents, about half of which live in Chapel Hill proper.
- Under the "Demand Driven" residential demand scenario, the trade area's population is projected to increase to 158,100 by 2040.
- The trade area is projected to become more affluent over the next two decades. After controlling for inflation, trade area per capita retail spending is projected to increase by 24% by 2040.





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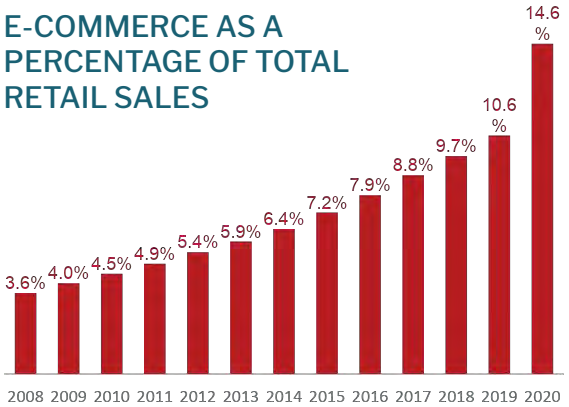
Source: Business Analyst, ESRI, SB Friedman

RETAIL TRENDS

Recent trends are impacting bricks & mortar retail nationally

- Growth of e-commerce is impacting brick & mortar retail development and 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.

E-COMMERCE AS A PERCENTAGE OF TOTAL RETAIL SALES



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- and convenience-focused retailers

Experiential retailers, food & beverage

Clicks-to-bricks

Draft

Source: SB Friedman, US Census Bureau

NET SPENDING POTENTIAL

Shifts are expected in per-capita retail spending

Retail Category	2022 Retail Spend per Capita (Net of Omni-Channel)	2022-2040 Change in Retail Spend per Capita (Net of Omni-Channel)
Food services & drinking places	$1,776	760
Building materials and garden equipment and supplies stores	$1,077	343
Grocery stores	$2,647	329
Furniture and home furnishings stores	$612	121
Health and personal care stores	$956	108
Miscellaneous store retailers	$629	(24)
Clothing and clothing accessories stores	$743	(108)
Sporting goods, hobby, book, and music stores	$407	(179)
Electronics and appliance stores	$483	(234)
General merchandise stores	$2,657	(243)

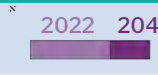
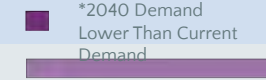
Draft

- After accounting for the various retail trends described on the previous page, we projected per capita retail spending in the Chapel Hill trade area net of e-commerce and omni-channel sales.
- Several sectors, including Food Services & Drinking Places and Grocery Stores, are projected to have higher per capita demand in 2040. On the other hand, sectors like General Merchandise Stores and Electronics & Appliance Stores are projected to have lower per capita demand in 2040.

Source: Business Analyst, SB Friedman

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		$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		$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

SB Friedman Development Advisors

Draft

RETAIL STRATEGIES

Draft

POTENTIAL DEVELOPMENT STRATEGIES
Retail

Activate Ground Floor at Key Locations
- Support vibrant pedestrian environments.
- Prioritize new, walkable retail and service development at TOD station areas along the N-S BRT with the highest projected ridership.
- Prioritize new, walkable retail and service development in Downtown

Encourage Retail that Reflects Community Needs or Emerging Typologies
- Attract additional retail development in in value-, convenience-, and experience-focused sectors, which are all growing nationally.
- Explore unmet local needs such as general merchandise, furniture & home furnishings, and building materials.

Support Local Small & Minority-Owned Businesses
- Encourage local small and minority-owned businesses to fill vacant spaces by connecting potential tenants with property owners and available resources.
- Encourage property owners to test alternative tenanting strategies, such as short-term leases or pop-ups
- Promote incentive resources.

Draft

HOTEL CHARACTERISTICS & DEMAND FORECAST

Draft

DEMAND PROJECTIONS

The existing pipeline is likely adequate to meet demand through 2040

- SB Friedman's projections show demand for an additional net 61-92 keys in Chapel Hill by 2040 as the result of population and employment growth.
- There are currently 97 keys under construction (Tarheel Lodging), and an additional 589 entitled. Assuming typical downcycling and redevelopment in the hotel market, this pipeline will meet our demand projections.
- For Chapel Hill to support further hotel development beyond the current pipeline, one or more of the following would likely need to occur:
  - Growth in tourism to Chapel Hill
  - Significant increase in the size of the UNC student body
  - Increase in the number of major events (conferences, sports, concerts, etc.) in Chapel Hill or hosted by UNC
  - Increase in the pace of hotel downcycling and redevelopment in Chapel Hill

CHAPEL HILL ENTITLED HOTEL PIPELINE

Project	Address	Keys	Stage
Tarheel Lodging	1740 Estes	97	In Construction
West Rosemary	108 W Rosemary	135	Entitled
Glen Lennox	5 Hamilton	150	Entitled
University Place	201 Estes	250	Entitled
Summit Place	101 Erwin	54	Entitled

Source: SB Friedman, Town of Chapel Hill

DOWNTOWN STRATEGIES

Draft

POTENTIAL DEVELOPMENT STRATEGIES
Downtown

Increase Service and Retail Offerings

Provide Support and Incentives to Property Owners with High Visibility Vacancies

- Provide supportive services or incentives to businesses and property owners to fill high visibility vacancies
- Add retail to meet resident and worker needs: dry cleaners, yoga/fitness studios, urban format general merchandise stores and pharmacies.
- Develop new retail within in transit-supportive mixed-use formats, where possible.
- Continue working with the Downtown Partnership on programming and to attract and support businesses.

Expand Shared Parking Solutions

- Promote shared and flexible parking arrangements
- Free up surface parking lots for more productive uses.
  - Quantify current inventory and demand for parking.
  - Assess future demand based on study area development projections.
  - Recalibrate the employee and visitor parking strategy within the downtown core.
  - Develop a joint use parking policy to optimize use of available parking downtown.
  - Allow and facilitate joint use parking arrangements in public and private garages to minimize construction of new parking spaces.

Draft

TOD Accessibility:
Transportation Infrastructure Equity

Draft Implementation Strategies Discussion

1. LUMO Audit update and emerging recommendations
2. Housing forecasts and affordable housing strategies
3. Office, retail and hotel forecasts and strategies
4. Accessibility and equity strategies

Recommendations From Other Studies

Mobility & Connectivity Plan

- Provide… “a comprehensive transportation system that provides everyone safe and reasonable access to all that the community offers”.
- Follow “Complete Streets” best practices.
- Specific corridor recommendations identified including Martin Luther King Jr. Blvd and US Highway 15- 501 South.
- Implement greenway connectors.

Draft

Interconnecting Greenways

- Timberlyne
- Treelyne
- Eastern Explorer
- Cross Cities Connector
- Southern Circuit
- Homestead Connector
- Barclay Connector
- Pritchard Connector

Draft

Complete Communities - Transportation Greenways

- Timberlyne
- Treelyne
- Eastern Explorer
- Cross Cities Connector
- Southern Circuit
- Homestead Connector
- Barclay Connector
- Pritchard Connector

Draft

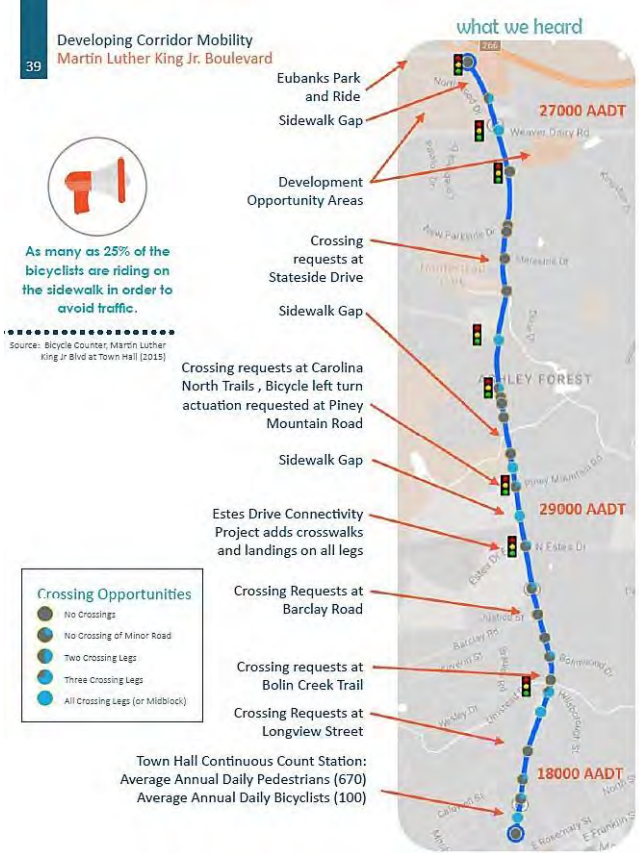
Martin Luther King Jr. Blvd. Review

Short-Term Recommendations

- Upgrade and widen sidewalks along corridor.
- Add pedestrian crossings and improve bike lane markings at key intersections.
- Improve bicycle signal actuation at all major intersections.
- Improve connections with existing and planned greenways, trails and side paths.

Long-term Recommendations

- Provide separated bicycle facilities (i.e., shared-use path) along both sides of the roadway.



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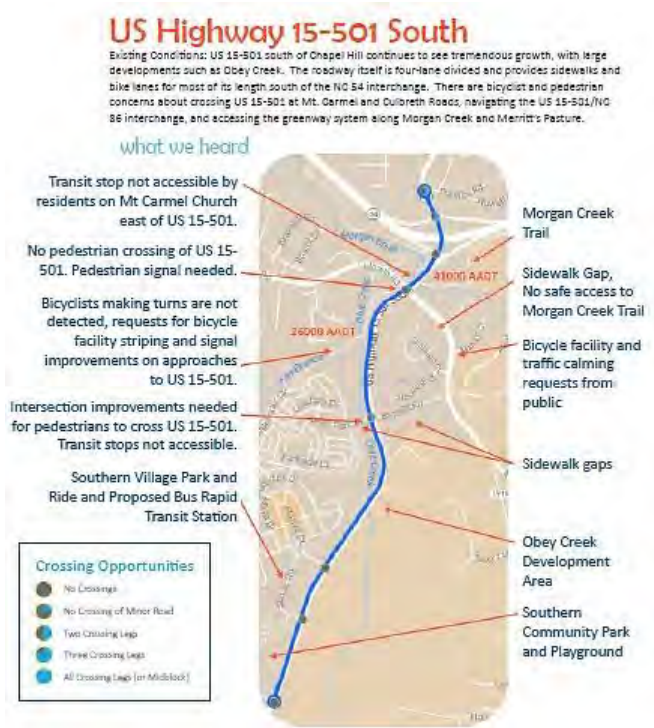
US Highway 15-501 South Review

Short-Term Recommendations

- Improve bike lanes and markings at the key intersection.
- Construct a greenway connecting Mt. Carmel Church Road to the Fan Branch Trail.

Long-term Recommendations

- Provide separated bicycle facilities (i.e., shared-use path) along both sides of the roadway.



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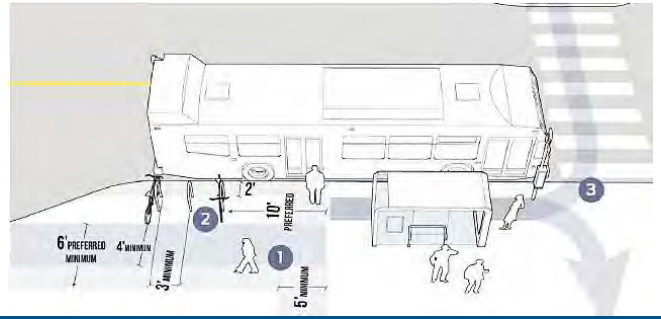
Bike Parking at BRT Stations

- Short-term: Minimum of 6 covered spaces
- Long-term: 5% of auto spaces or minimum of 8 covered spaces
- Secure parking especially important for more expensive bikes (i.e., e-bikes)
- Well-designed and accessible unsecure bike parking is also important



Draft

Bike Share

- Town is procuring bikeshare with UNC and Carrboro
- Consideration of bike share parking at all BRT stations
- Key to attracting riders in an accessible way for first/last mile as they will be e-bikes

Draft

Overarching Gaps and Deficiencies

Bike Parking, Bikeshare, Wayfinding

- Limited bike parking outside of downtown/UNC and park ‘n’ rides.
- Bikeshare only within the UNC campus, though this will change soon via the existing RFP for town-wide service.
- Limited wayfinding outside of the Greenway system.

Draft

NS-BRT Corridor: Summary of Input and Findings

Segment 1 (north): Eubanks, Weaver Dairy Road, & New Parkside

- Key sidewalk gaps adjacent to planned stations
- Upgrade connections to planned developments
- Improve uncontrolled and signalized crossings

Draft

NS-BRT Corridor: Summary of Input and Findings

Segment 2 (central): Homestead, Northfield, Piney Mountain, Estes, & Hillsborough

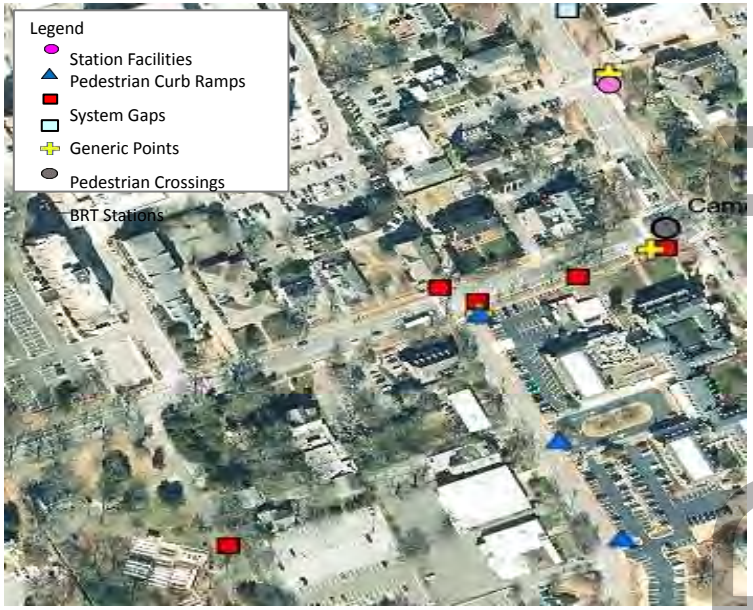
- Upgrade connections to planned developments (e.g., homeless/supportive housing near Homestead)
- Key sidewalk gaps adjacent to planned stations.
- Improve E/W bicycle connections (e.g., Estes corridor, Bolin Creek Greenway)
- Improve uncontrolled and signalized crossings (maintain RRFB mid-block crossings)

Draft

NS-BRT Corridor: Summary of Input and Findings

Segment 3 (downtown): Longview, Franklin, Cameron, Pittsboro, Carrington Hall, Manning/East

- Key sidewalk gaps adjacent to planned stations
- Upgrade connections to planned developments (e.g., future UNC hospital development)
- Improve uncontrolled and signalized crossings (i.e., all ped phase or improved signal timing)
- Improve bicycle connections (on- street and off-street, e.g., Cameron)
- Increased bike parking, specifically covered/secured
- Traffic calming opportunities, speed identified as a concern



Draft

NS-BRT Corridor: Summary of Input and Findings

Segment 4 (south): NC 54, Culbreth, Southern Village

- Key sidewalk gaps and ADA deficiencies (high-level) adjacent to planned stations and at overpasses/ bridges
- Improve connections to the greenway

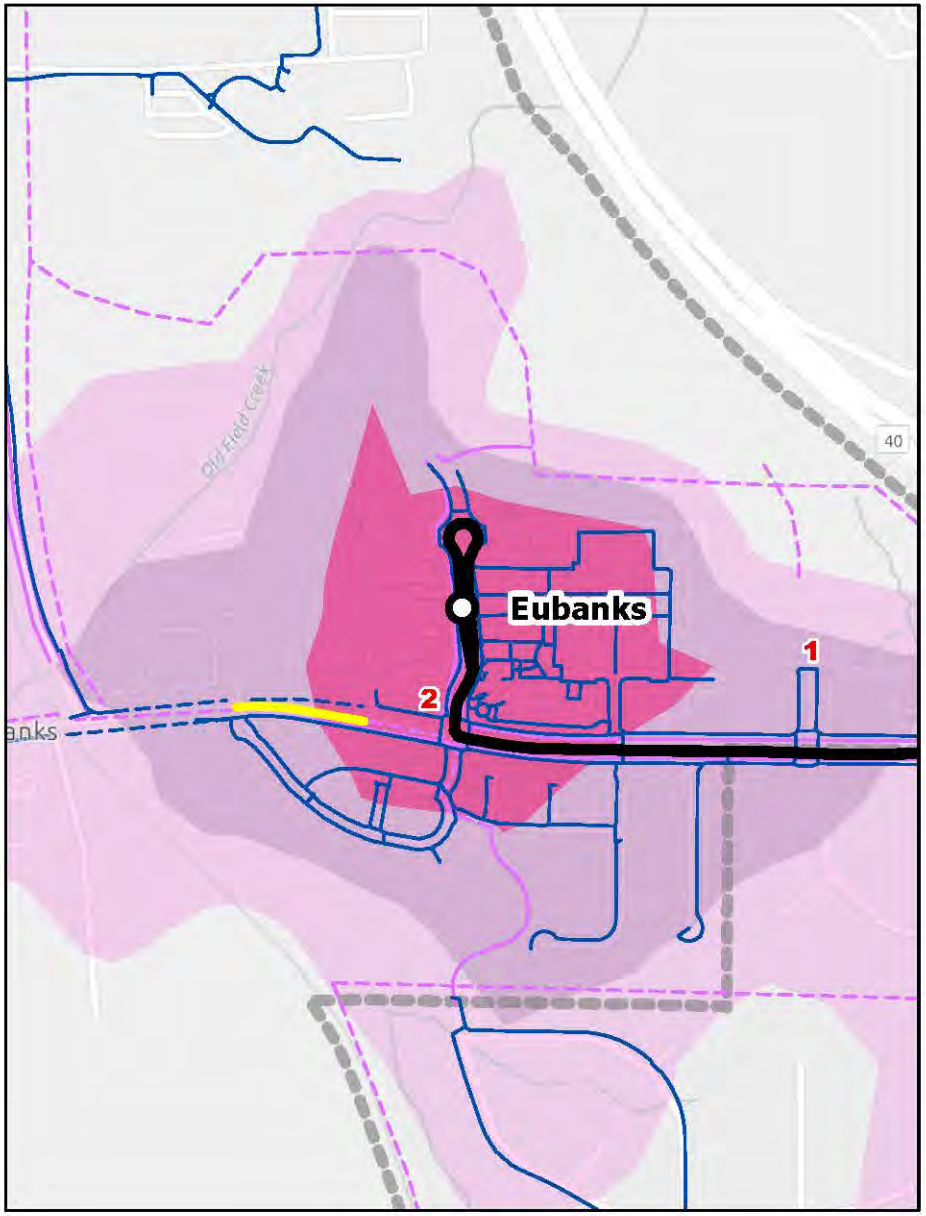
Draft

Recommendations Summary

- 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 in necessary
- Accessible signage and wayfinding
- Bike parking (secure) and other user amenities (benches, bike racks, trash receptacles, etc.)

Draft

Recommendations/Transit Equity Recommendations



No	Station	Description	Recommendation
1	Eubanks	No sidewalk south side of Carraway Crossing east of lot	250 LF Sidewalk Extension
2	Eubanks	Sidewalk on north side of Eubanks Road ends west of park and ride.	Min 140 LF Sidewalk Extension
3	Eubanks	No sidewalk north side of Eubanks Road from Village Center Drive to MLK	150 LF Sidewalk Extension

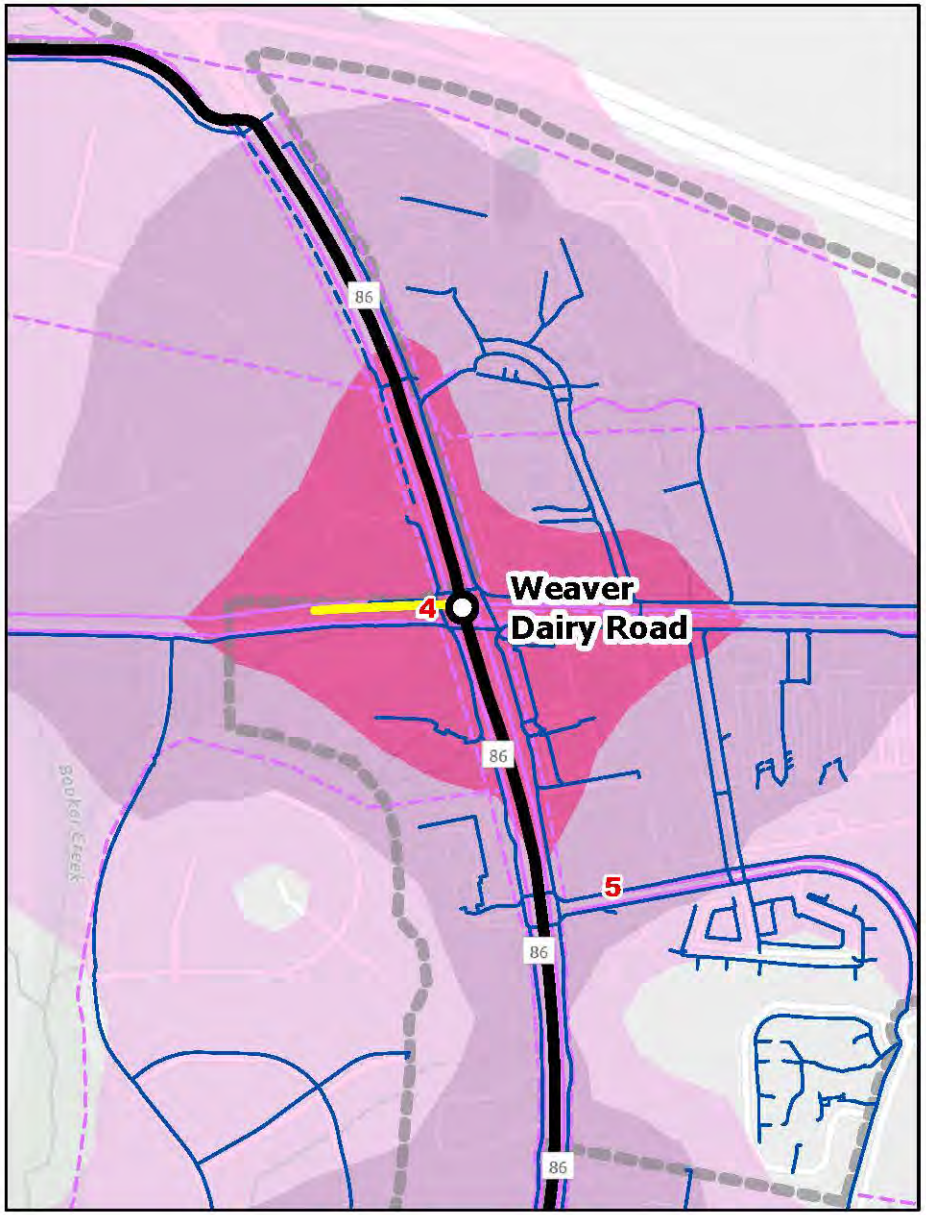
Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

0 0.25 Miles

Network Gaps - Eubanks

Draft



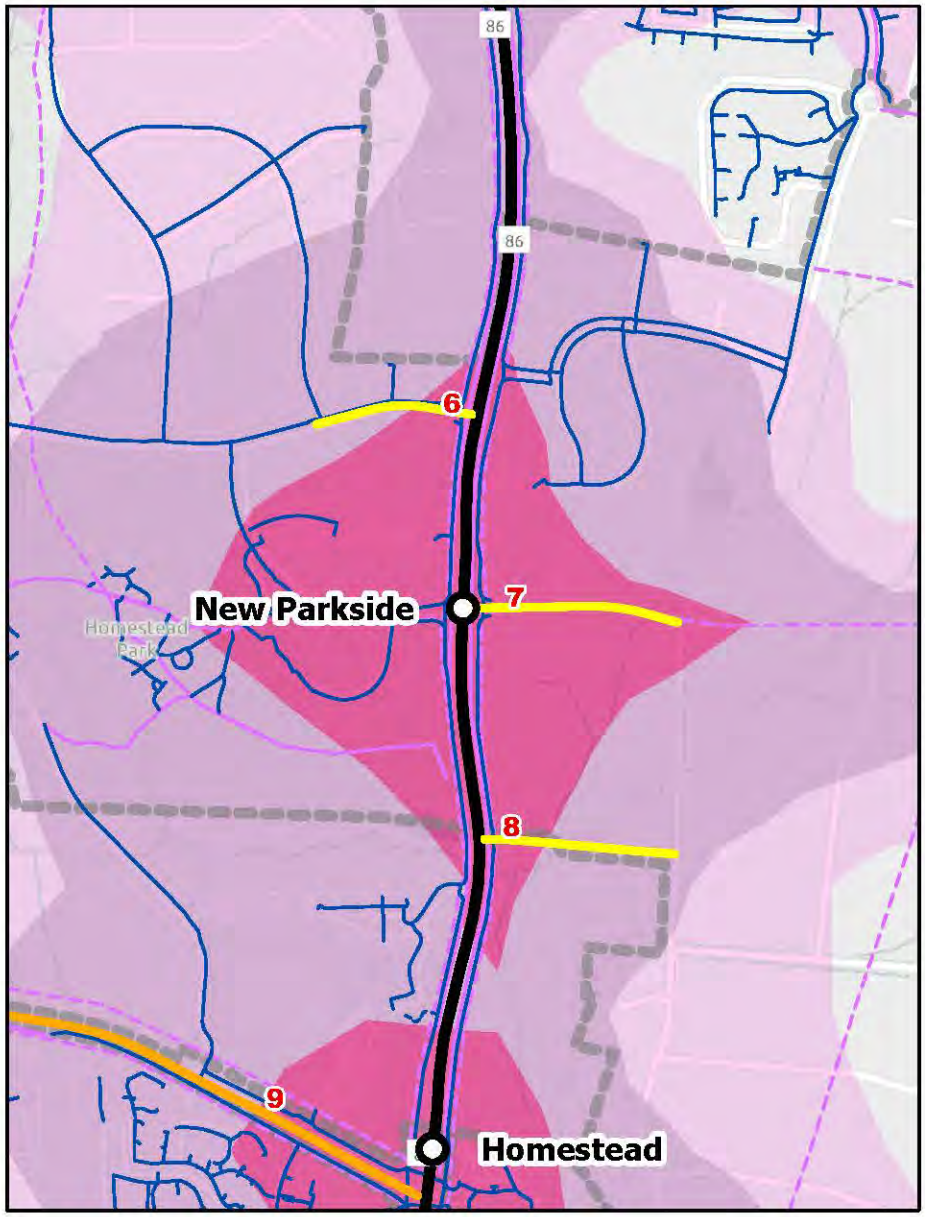
No	Station	Description	Recommendation
4	Weaver Dairy Road	Sidewalk ends north side of Weaver Dairy Road.	Min 200 LF Sidewalk Extension - If development occurs on north side of WDR
5	Weaver Dairy Road	Noncompliant, narrow sidewalk along Westminster Drive.	Min 350 LF Sidewalk Widening to Compliance

Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

Draft

Network Gaps - Weaver Dairy Road



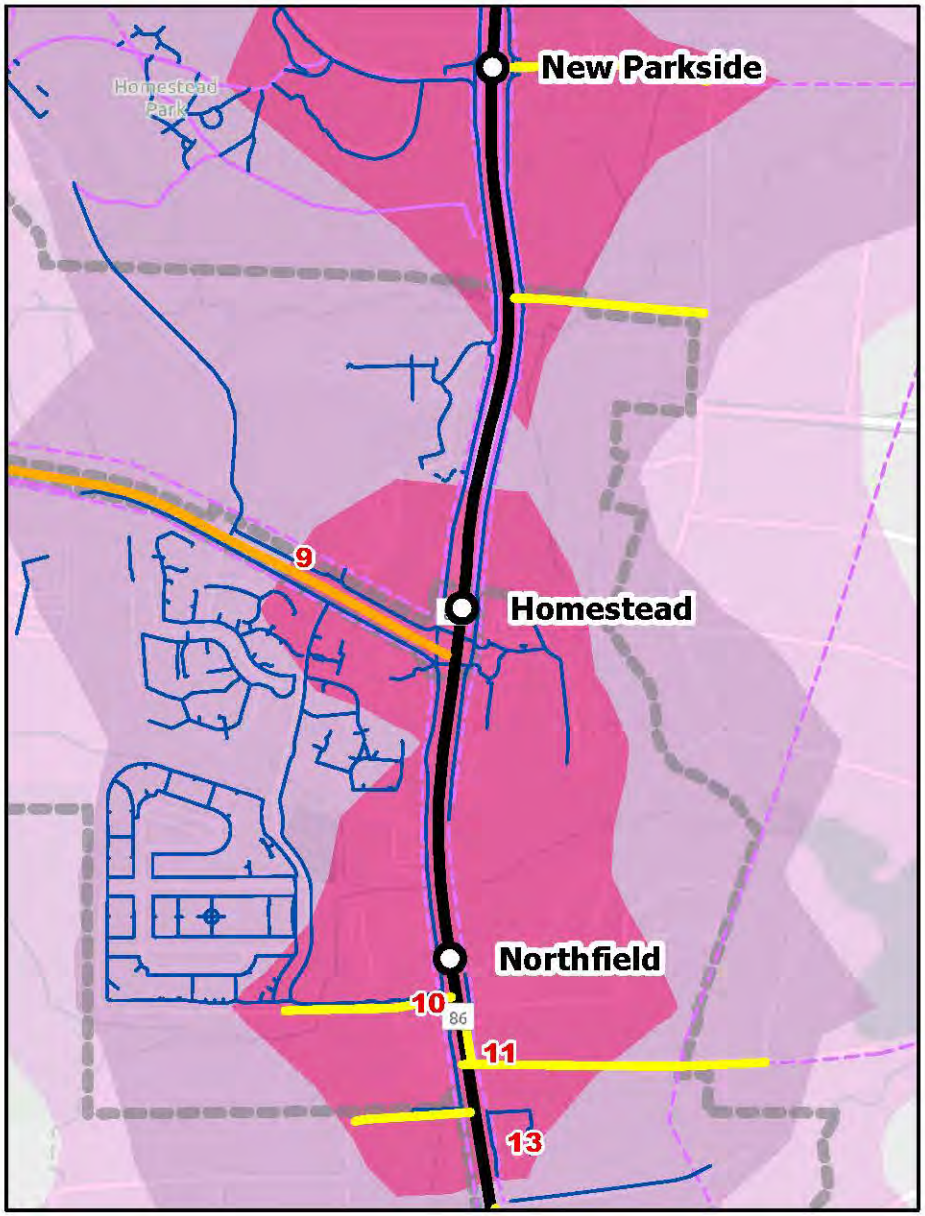
No	Station	Description	Recommendation
6	New Parkside	No sidewalk south side of New Parkside Drive	750 LF Sidewalk Extension
7	New Parkside	No sidewalk either side of Stateside Dr.	Min 700 LF Sidewalk Extension
8	New Parkside	No sidewalk either side of Dixie Ln.	660 LF Sidewalk Extenison

Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

Draft

Network Gaps - New Parkside



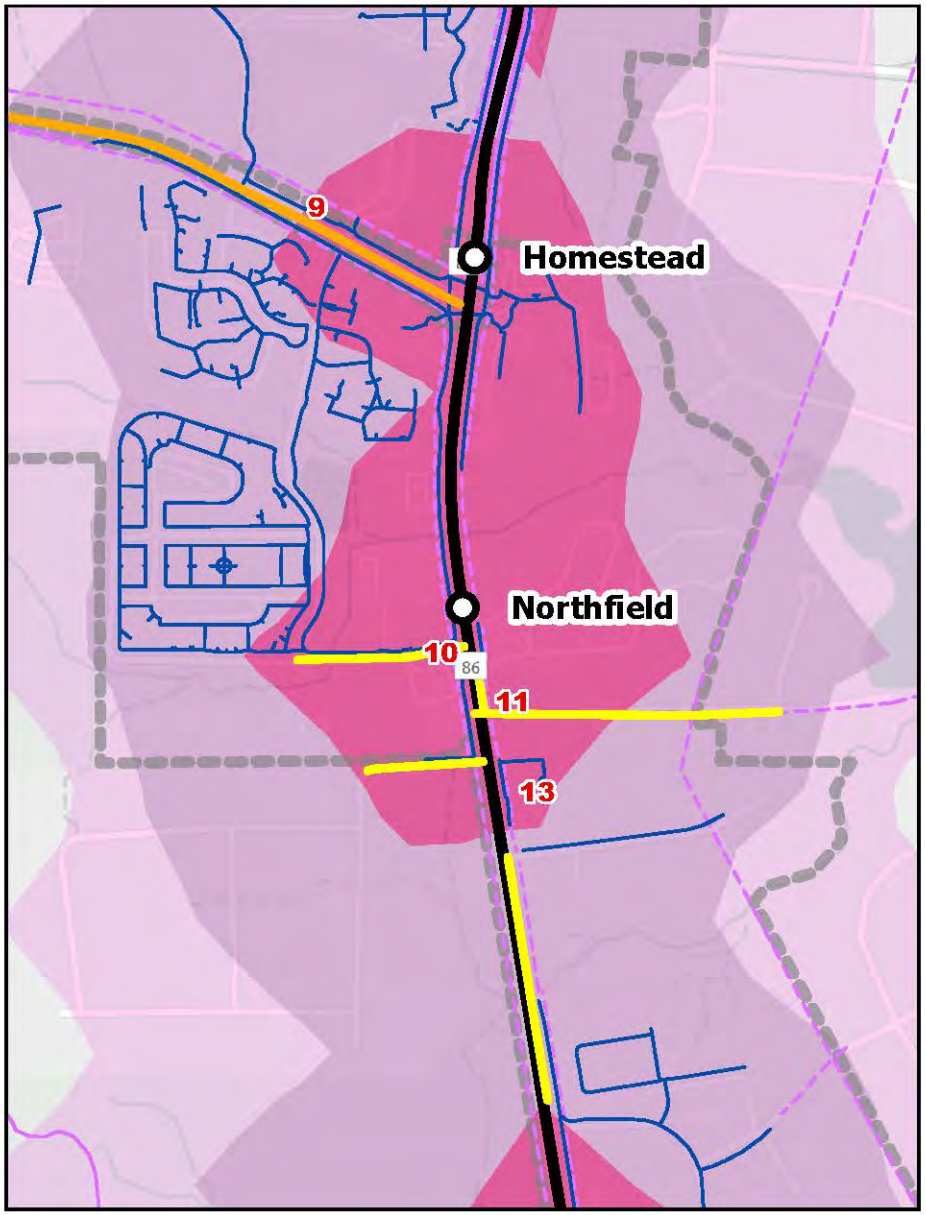
No	Station	Description	Recommendation
9	Homestead	No dedicated bike facilities along Homestead from MLK to trail entrance	2,500 LF sharrow or bikeable road conversion

Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

Draft

Network Gaps - Homestead



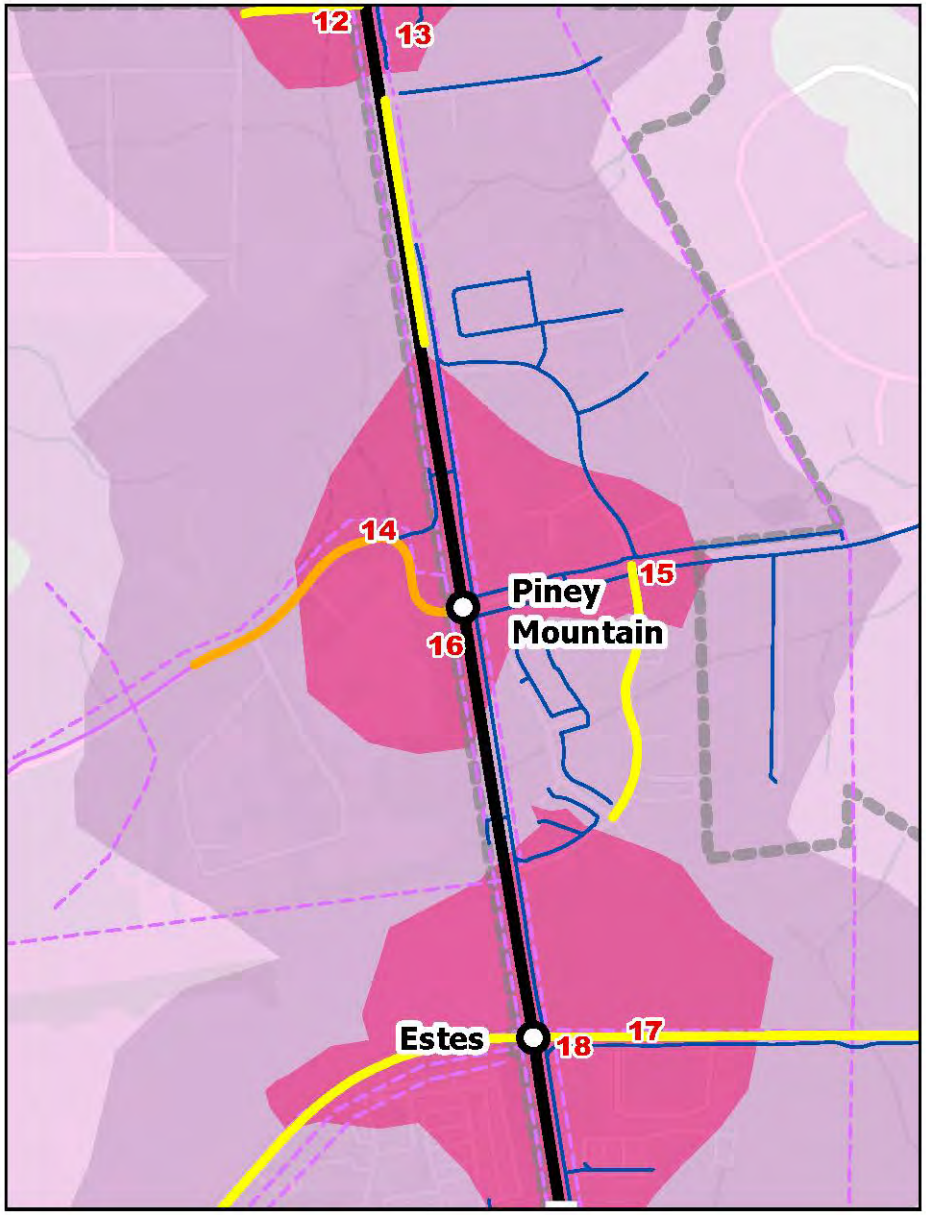
No.	Station	Description	Recommendations/Transit Equity Recommendations
10	Northfield	No sidewalk south side of Northfield Drive.	Min 500 LF Sidewalk Extension - If development occurs on south side of Northfield Drive
11	Northfield	No sidewalk either side of Taylor + No sidewalk along side of MLK, goat path visible.	150 LF Sidewalk Extension on MLK + Min 1,000 LF Extension on Taylor Street
12	Northfield	No sidewalk either side of Critz Dr.	Min 400 LF Sidewalk Extension
13	Northfield	MLK sidewalk ends south of Ashley Forest Road, goat path visible.	950 LF Sidewalk Extension

Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

Network Gaps - Northfield

Draft



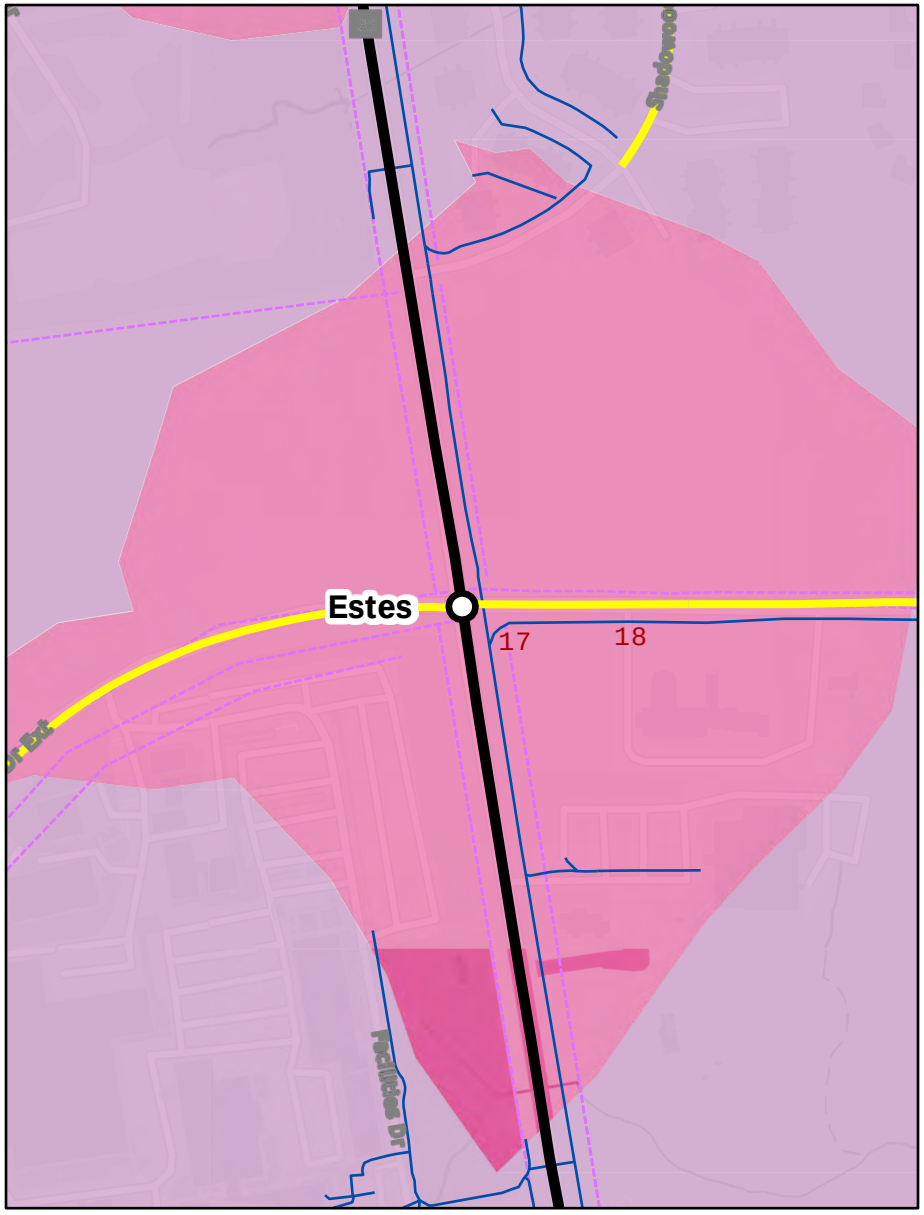
No.	Station	Description	Recommendations/Transit Equity Recommendations
14	Piney Mountain	No dedicated bike facility along Municipal Drive connecting MLK to nearby greenway.	Min 1,500 LF sharrow or bikeable road conversion
15	Piney Mountain	No sidewalk down south side of Shadowood Dr.	Min 350 LF Sidewalk Extension
16	Piney Mountain	No bike facilities on MLK.	Add bike facilities

Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

Network Gaps - Piney Mountain

Draft



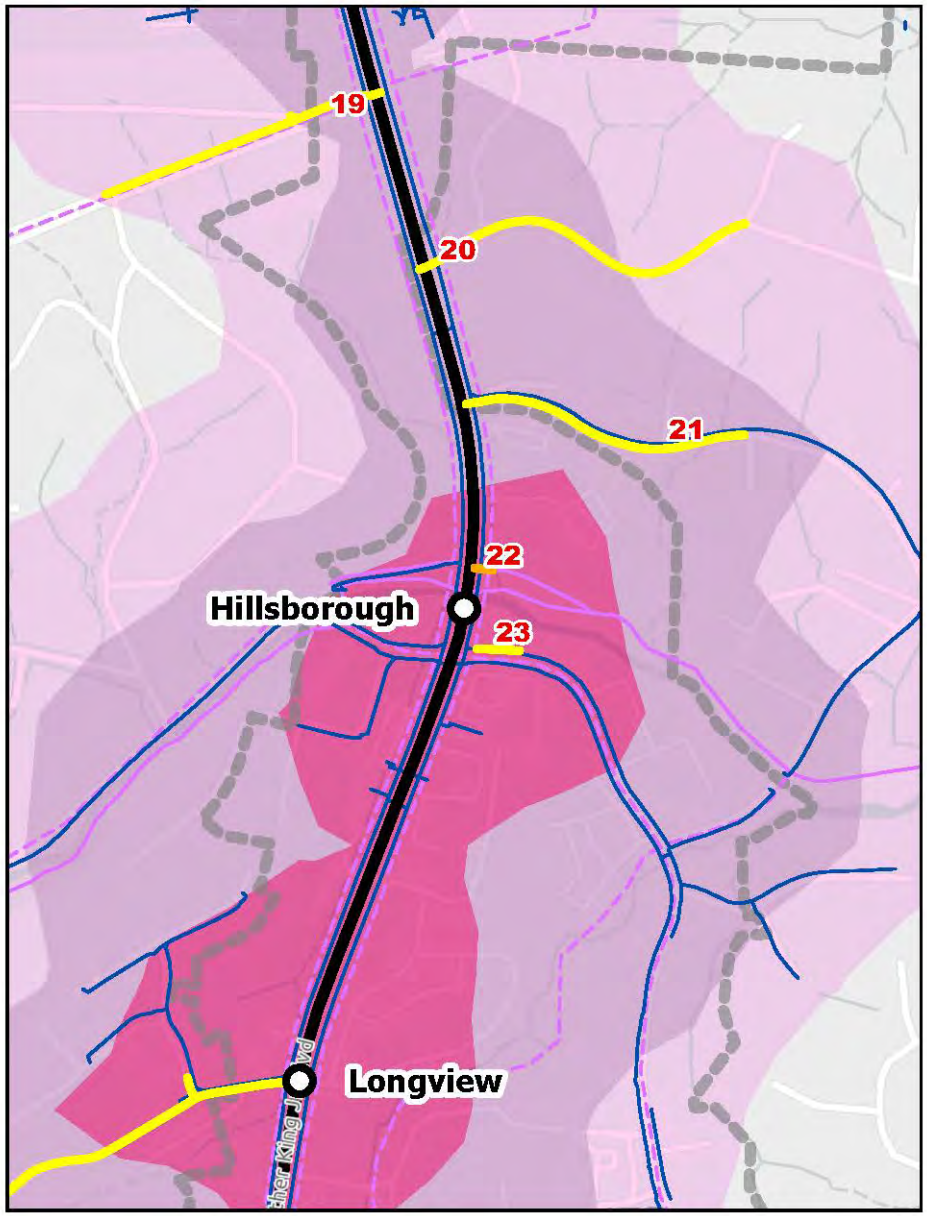
No.	Station	Description	Recommendations/Transit Equity Recommendations
17	Estes	3-4 foot, not compliant, asphalt walkway along east side of Estes Drive.	Min 1,500 LF Sidewalk Widening to Compliance
18	Estes	No sidewalk along west leg of Estes.	Min 700 LF Sidewalk Extension

Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

Draft

Network Gaps - Estes



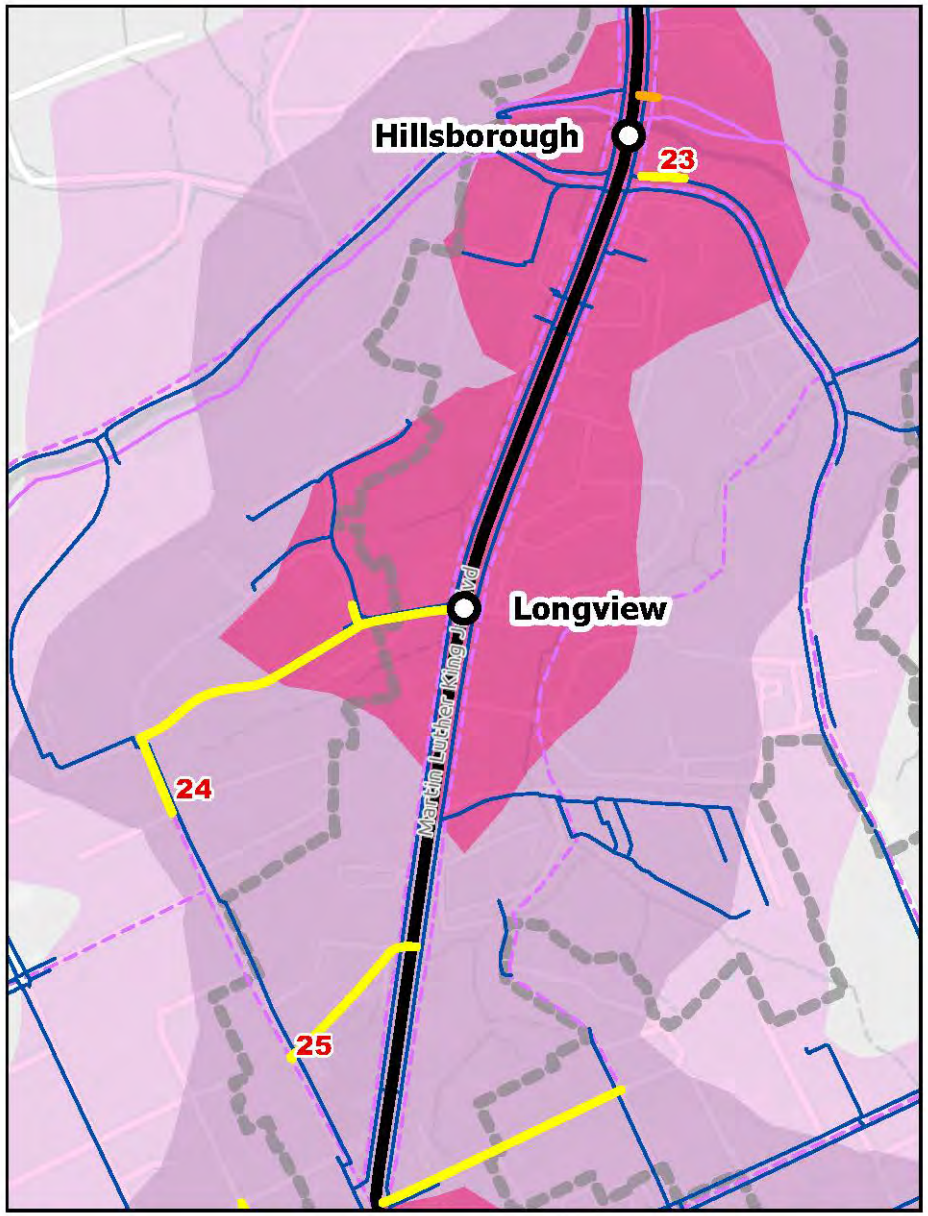
No.	Station	Description	Recommendations/Transit Equity Recommendations
19	Hillsborough	No sidewalk down Barclay St, No crossing over MLK.	Min 1,000 LF Sidewalk Extension down Barclay St and Justince - Consider dedicated pedestrian crossing over MLK
20	Hillsborough	No sidewalk down Mt Bolus Rd + no crossing over MLK.	Min 1,200 LF Sidewalk Extension
21	Hillsborough	Noncompliance, narrow sidewalk along Bolinwood Drive.	Min 1,500 LF Sidewalk Widening to Compliance
22	Hillsborough	No curb cut or dedicated access from MLK bike shoulder to greenway entrance.	Installation of accessible curb cut and integration with MLK bike shoulder
23	Hillsborough	Sidewalk on Hillsborough Street ends at gas station with ADA issues along the property.	Min 900 LF Sidewalk Extension + 100 LF Sidewalk Widening to Compliance

Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

Network Gaps - Hillsborough

Draft



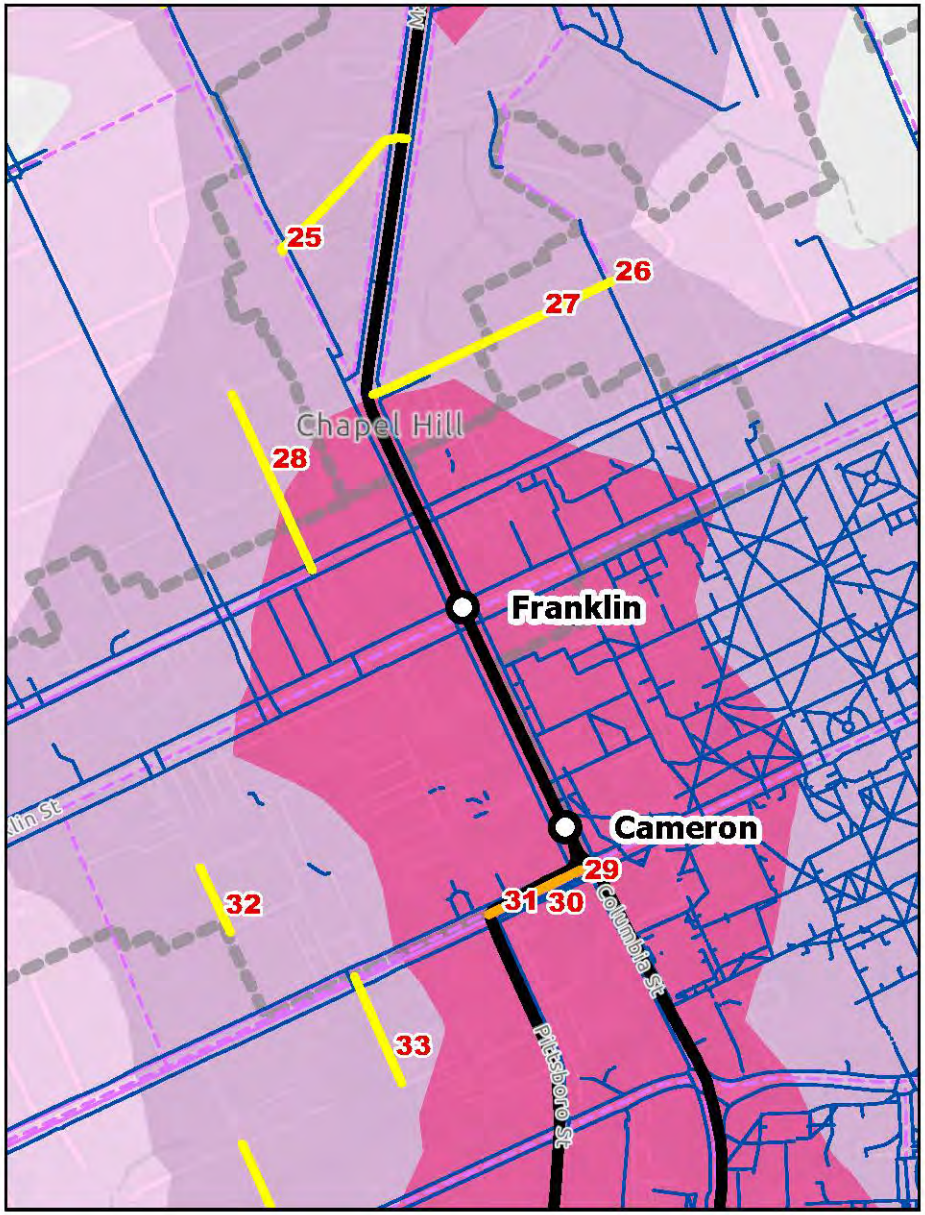
Network Gaps - Longview

No.	Station	Description	Recommendations/Transit Equity Recommendations
24	Longview	Sidewalk inconsistent along North Columbia Street.	Sidewalk Extenion or Dedicated Pedestrian Crossing where Sidewalks Change Sides
25	Longview	No sidewalk, goat path on south side of west leg of East Longview Street.	350 LF Sidewalk Extension

Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

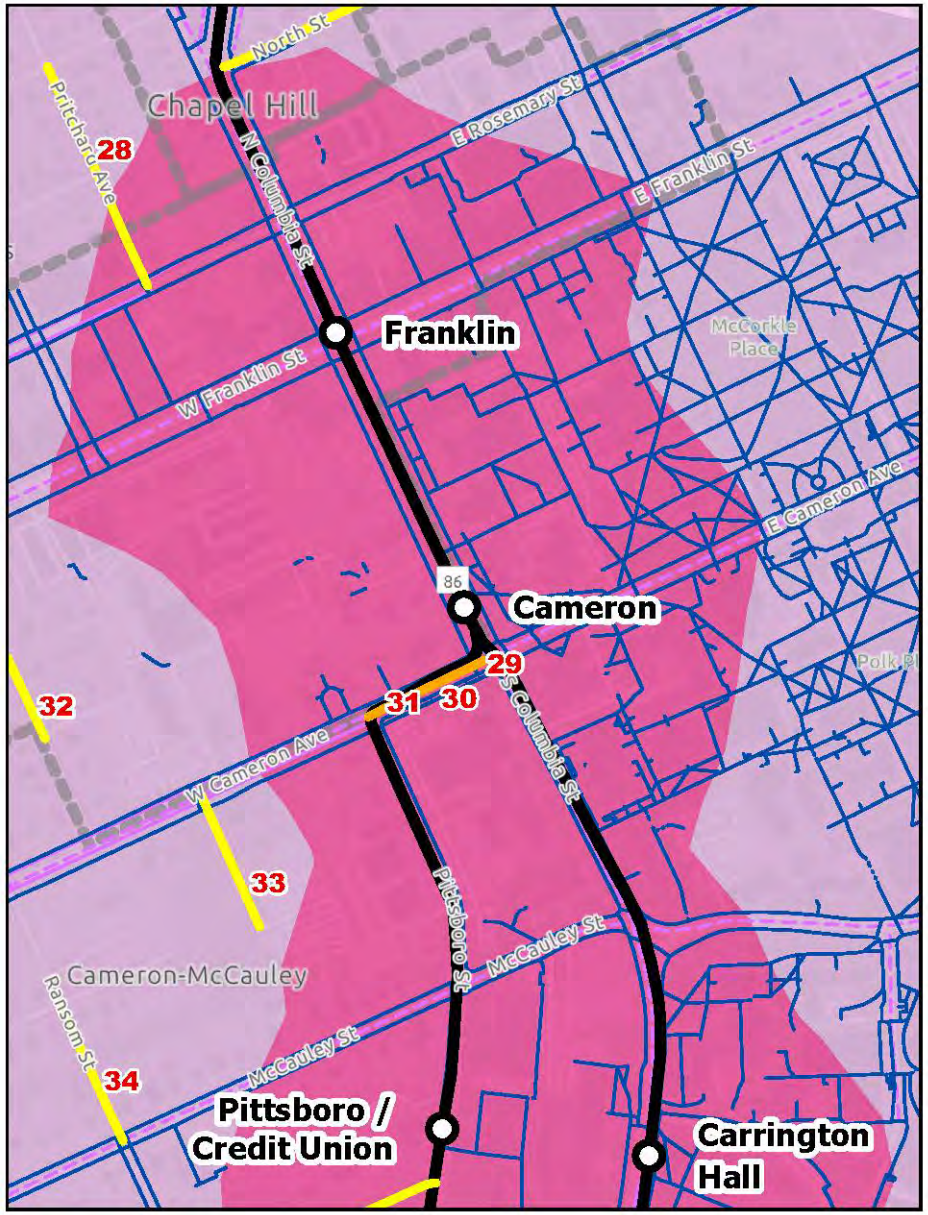
Draft



No.	Station	Description	Recommendations/Transit Equity Recommendations
26	Franklin	Sidewalk ends around corner of Columbia Street and Stephens Street, sidewalk only on one side of Stephens.	Min 500 LF Sidewalk Extension
27	Franklin	Curb ramps blocked and inaccessible at corner of North Street and Henderson Street.	Reconstruct to Compliance
28	Franklin	No sidewalk either side of North Street.	Min 900 LF Sidewalk Extension
29	Franklin	No sidewalk either side of Pritchard Ave.	Min 650 LF Sidewalk Extension

Network Gaps - Franklin

Draft



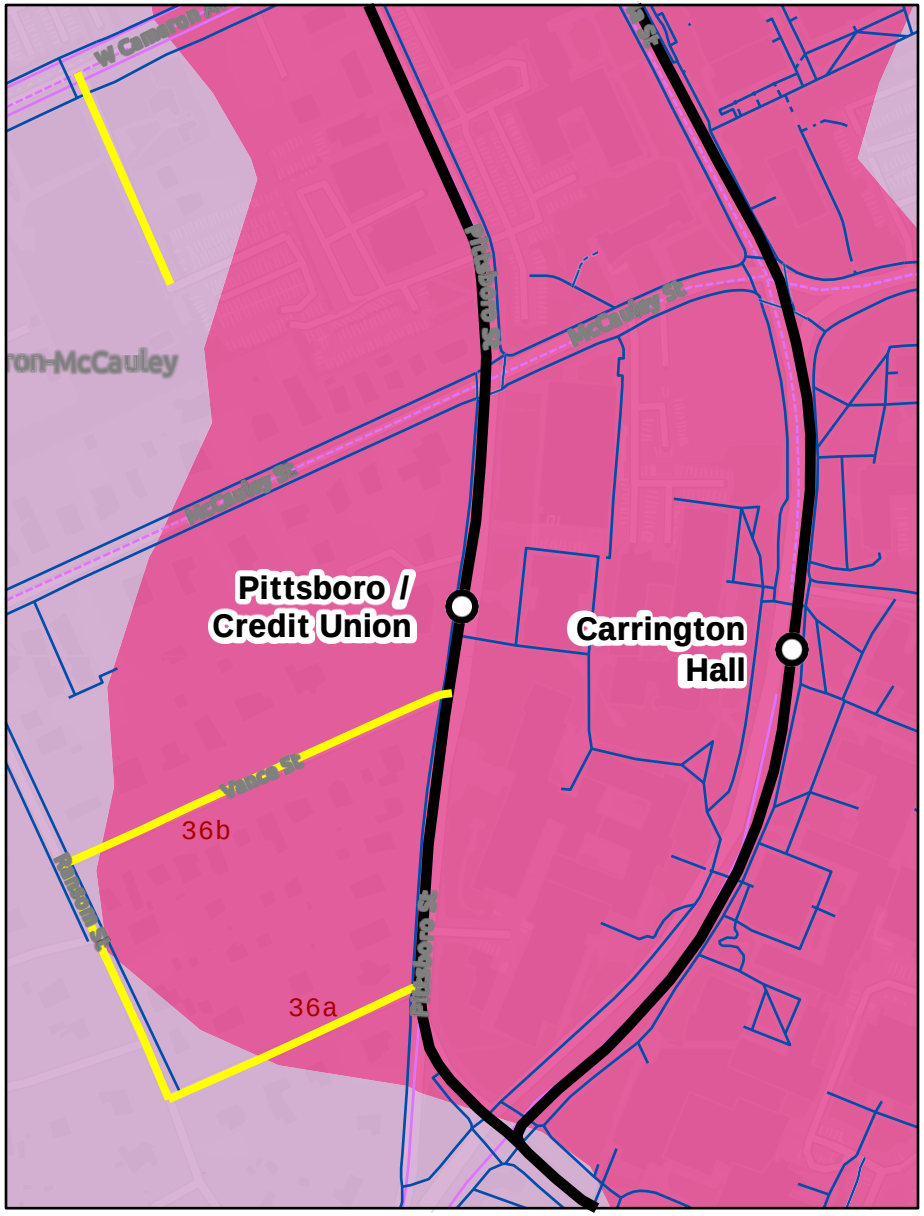
Network Gaps - Cameron

No.	Station	Description	Recommendations/Transit Equity Recommendations
30	Cameron	Missing bricks, steep slope along West Cameron Ave.	Redesign sidewalk or provide accessible alternate route on north end of Cameron
31	Cameron	Sidewalk on West Cameron not compliant though tree important.	Redesign sidewalk or provide accessible alternate route on north end of Cameron
32	Cameron	Bike lane/shoulder gap on West Cameron Avenue, ends abruptly across Pittsboro.	380 LF Bikeable Road Conversion
33	Cameron	Noncompliant, narrow and inaccessible sidewalk along Mallette Street.	Min 250 Sidewalk Redesign to Compliance
34	Cameron	Inconsistent sidewalk along Wilson Street, goat path present.	400 LF Sidewalk Extension
35	Cameron	No perpendicular crossing for bikes over RR crossing at Cameron & Merritt Hill Road.	Re-align bike lane to approach RR crossing at perpendicular angle
36	Cameron	No dedicated bike facility on eastbound side of Cameron, clearly well used.	2,000 LF bike lane or Bikeable Road Conversion along south side of West Cameron Ave.

Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

Draft



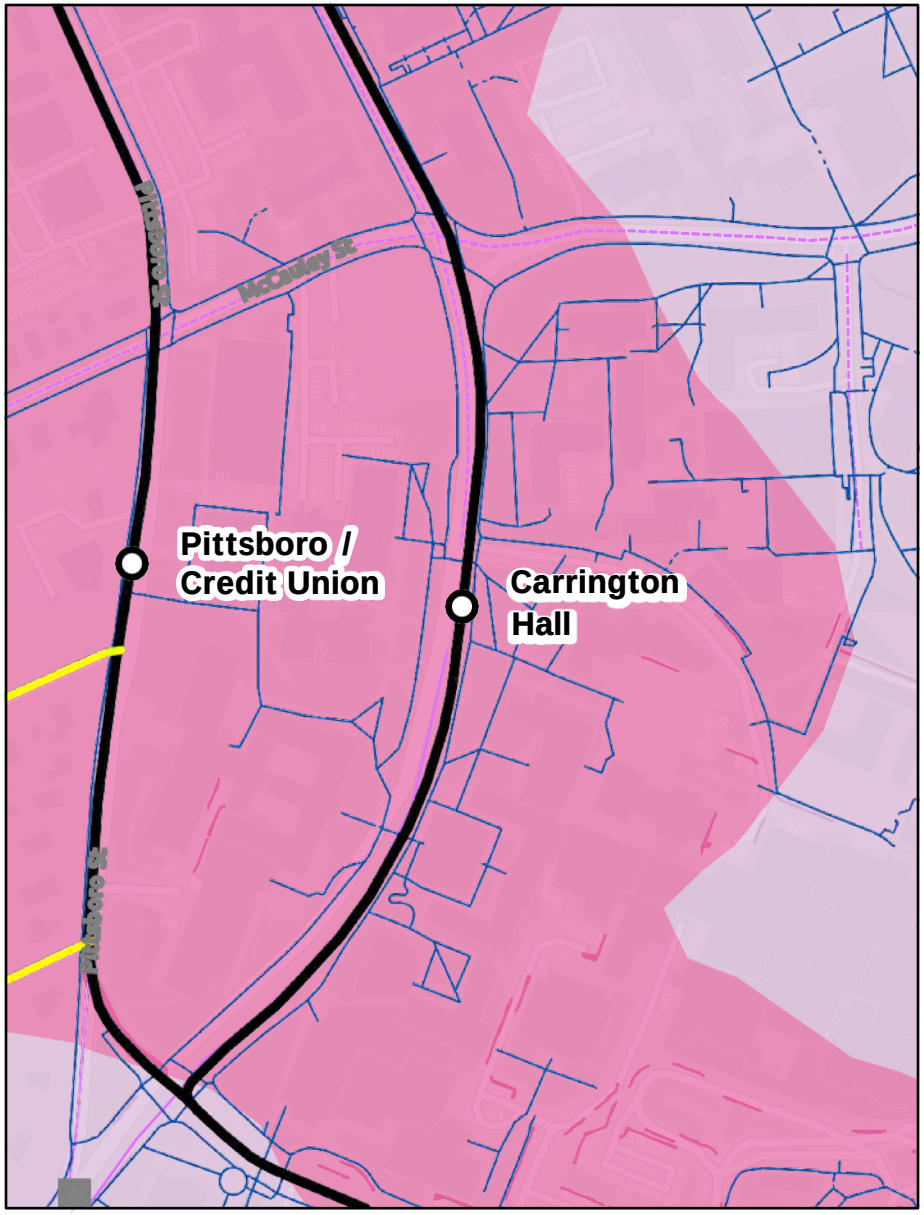
No.	Station	Description	Recommendations/Transit Equity Recommendations
36a	Pittsboro/ Credit Union	Sidewalk gaps along University.	450 LF Sidewalk Extenion
36b	Pittsboro/ Credit Union	Sidewalk gaps, well-worn goat path present along Vance and Ransom.	430 LF Sidewalk Extension on Ransom St. 700 LF Sidewalk Extension on Vance St.

Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

Draft

Network Gaps - Pittsboro / Credit Union



No.	Station	Description	Recommendations/Transit Equity Recommendations

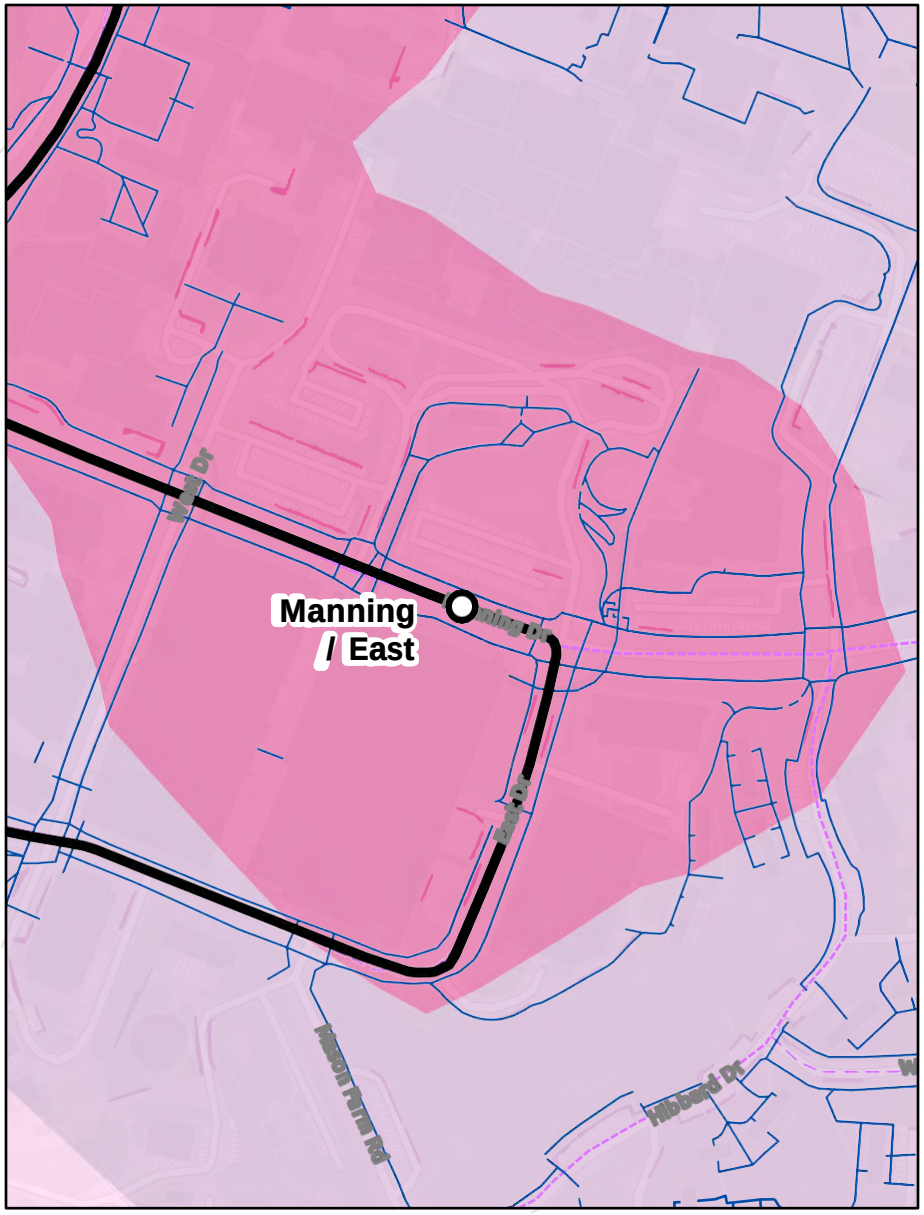
No gaps identified at this station.

Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

Draft

Network Gaps - Carrington Hall



No.	Station	Description	Recommendations/Transit Equity Recommendations

No gaps identified at this station.

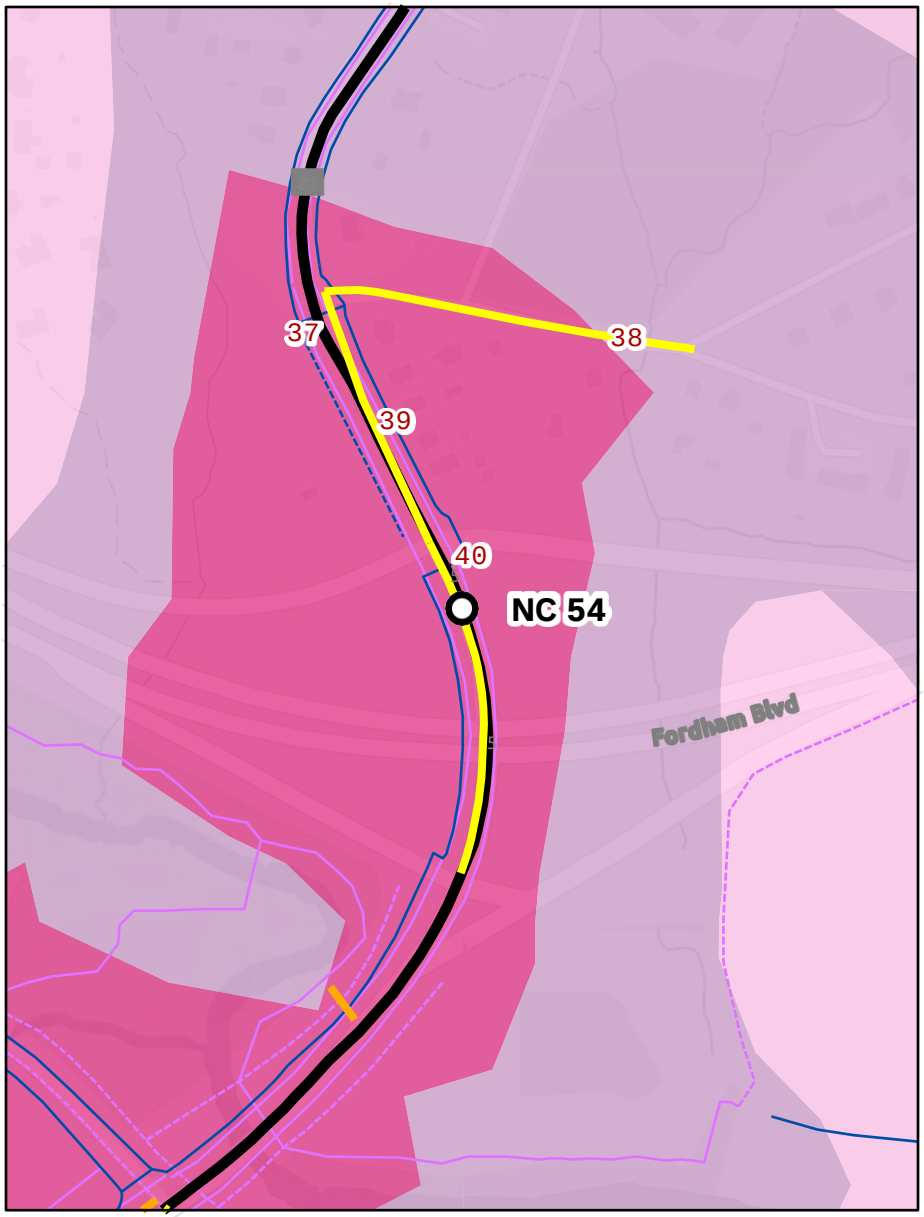
Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

0 0.25 Miles

Network Gaps - Manning / East

Draft



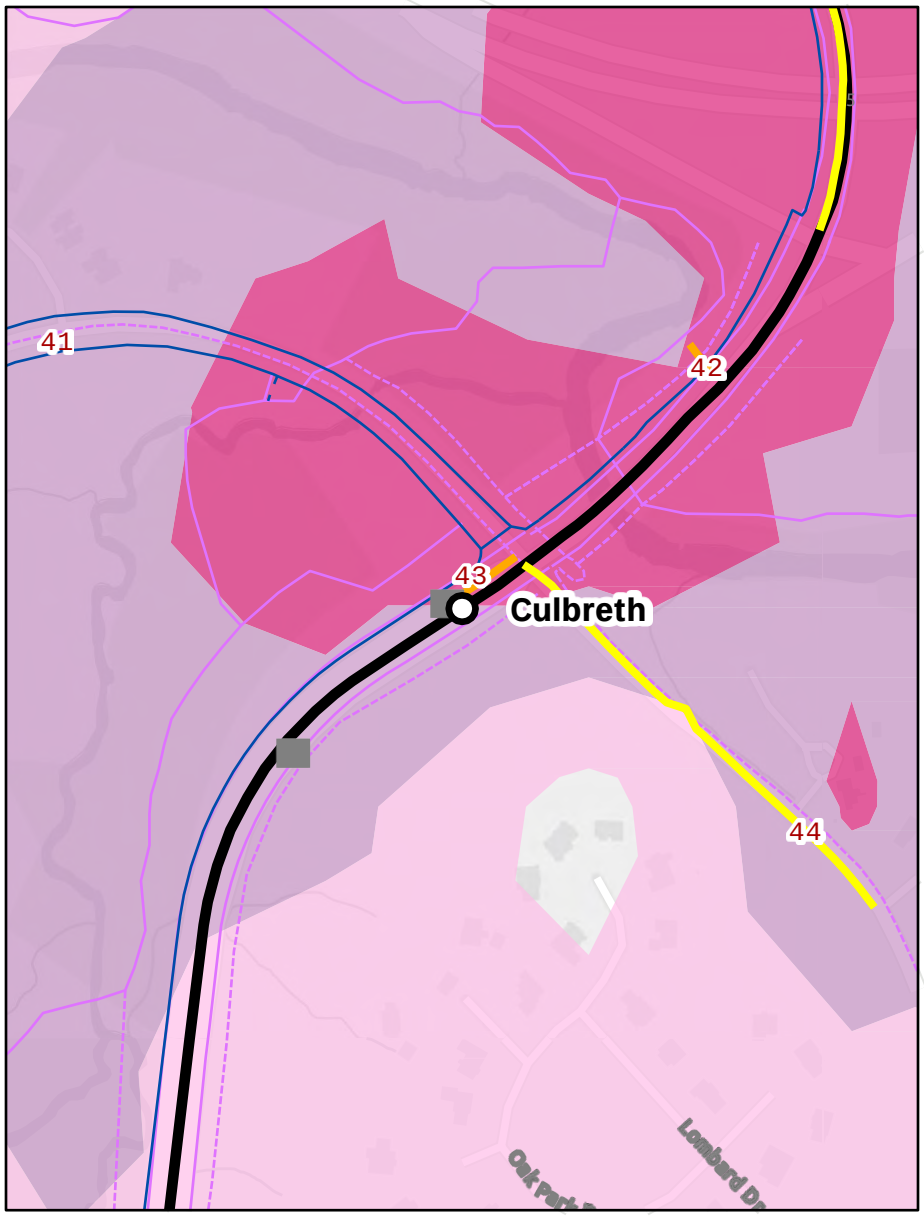
No.	Station	Description	Recommendations/Transit Equity Recommendations
37	NC 54	No sidewalk on west side of MLK, goat path present.	Min 500 LF Sidewalk Extension
38	NC 54	No sidewalk either side of Purefoy Road.	Min 650 LF Sidewalk Extension
39	NC 54	Noncompliance, 4 foot wide sidewalk on MLK.	Min 500 LF Sidewalk Widening to Compliance
40	NC 54	East side gap at MLK & NC 54 Offramp must cross twice.	Solved with new sidewalk on west side of MLK

Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

Network Gaps - NC 54

Draft



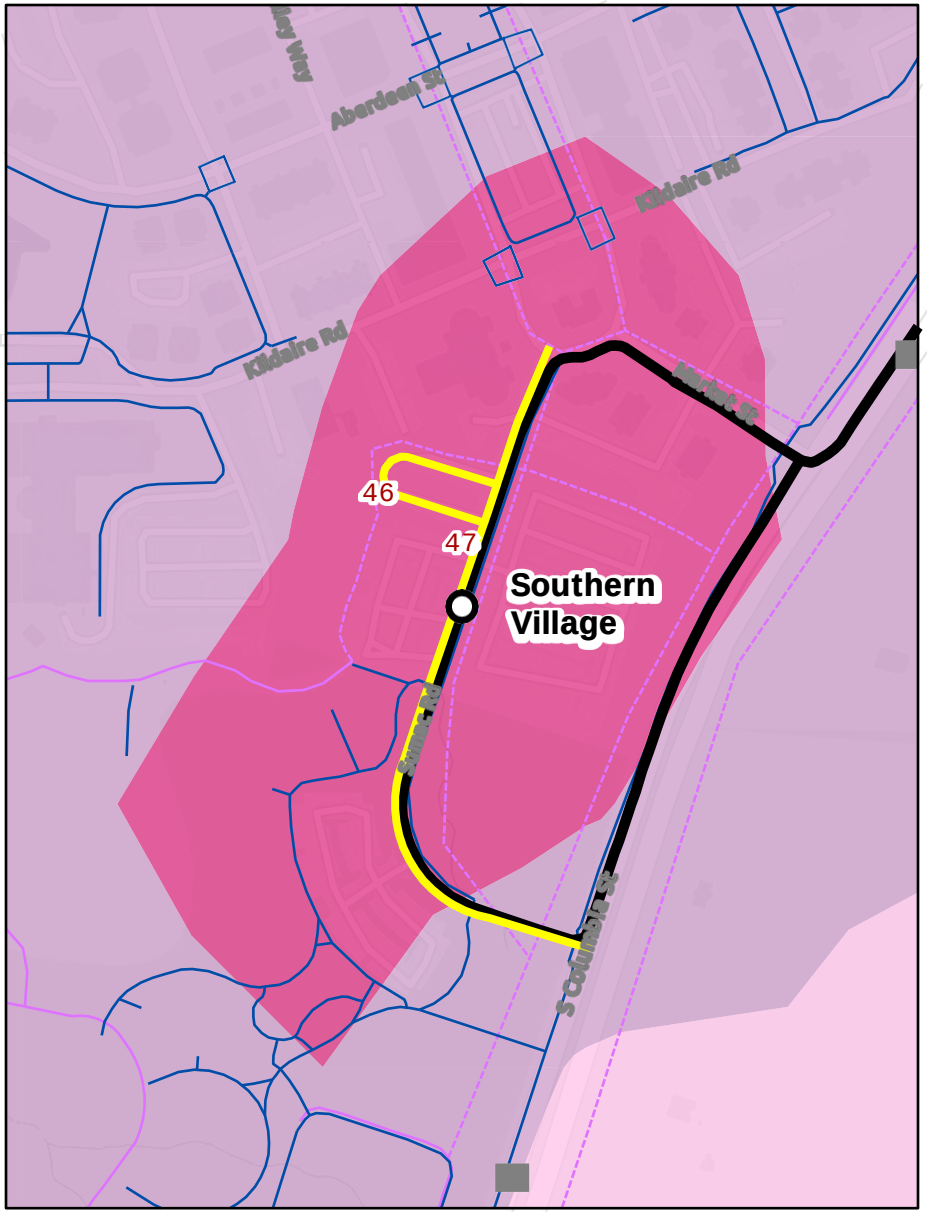
No.	Station	Description	Recommendations/Transit Equity Recommendations
41	Culbreth	Non-Compliance: 4-foot sidewalk on Culbreth Road.	Min 400 LF Sidewalk Widening to Compliance
42	Culbreth	No curb ramp for MLK bike lane access to greenway.	Installation of accessible curb cut and integration with MLK bike lane
43	Culbreth	No real access to sidepath direct from MLK bike lane, cyclists must cut into Culbreth to access sidepath curb ramp	Installation of accessible curb cut and integration with MLK bike lane
44	Culbreth	No sidewalk either side of Mt Carmel Church Road.	Min 650 LF Sidewalk Extension
45	Culbreth	No sidepath connection over Morgan Creek Bridge between greenways.	Widen bridge to accommodate pedestrians and bikes

Network Gaps
- Bike/Sidepath Gap
- Sidewalk Gap
- Existing Sidewalks
- Planned Sidewalks
- Existing Sidepaths
- Planned Sidepaths

Station Walksheds
- 5 Minutes
- 10 Minutes
- 15 Minutes
- BRT Stations
- Planned Alignment

Network Gaps - Culbreth

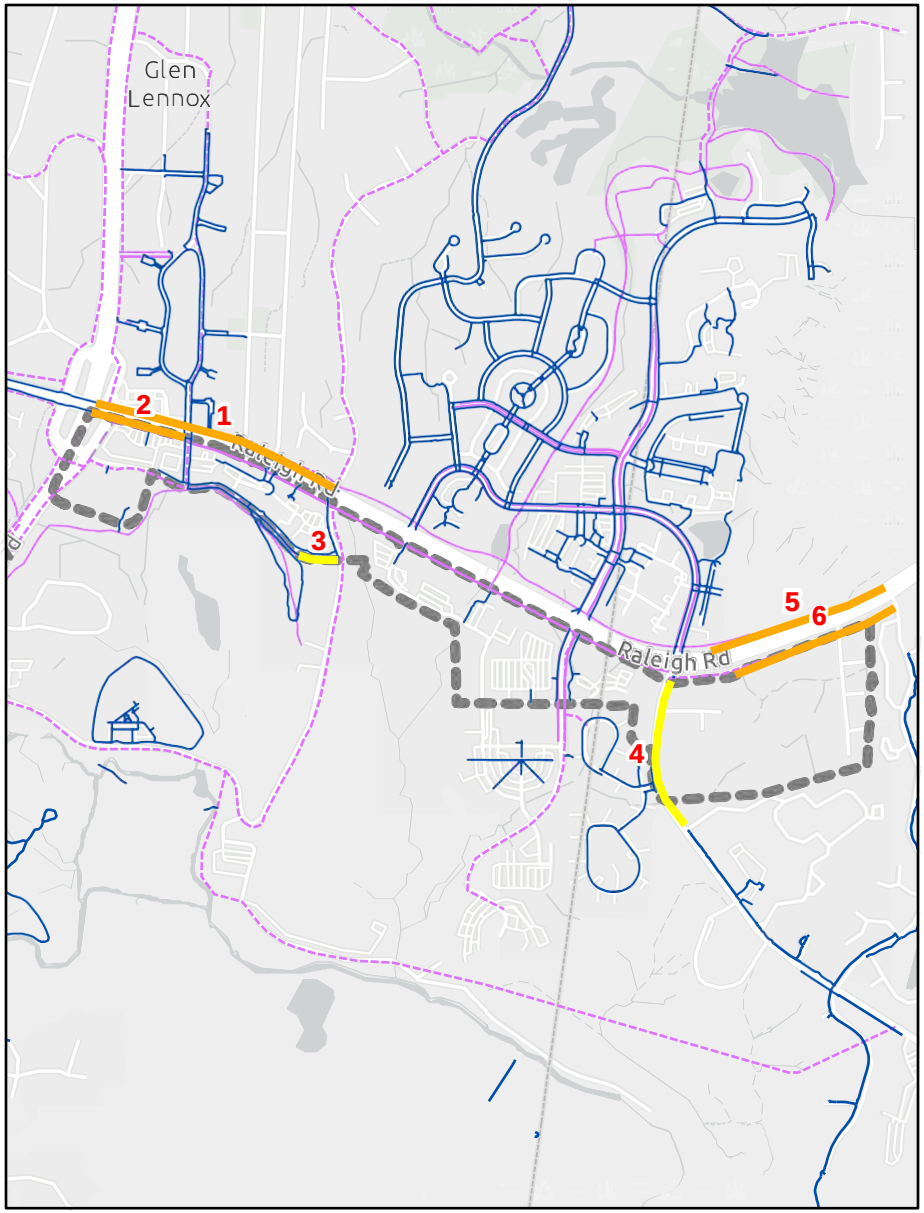
Draft



No.	Station	Description	Recommendations/Transit Equity Recommendations
46	Southern Village	Non-compliant sidewalk connection off Sumac Road.	Redesign to Compliance
47	Southern Village	Key sidewalk gap along all west side of Sumac Road and lack of curb ramps.	1,000 LF Sidewalk Extension

Network Gaps - Southern Village

Draft



No.	Description	Recommendations/Transit Equity Recommendations
1	No sidepath along north side of NC 54/Raleigh Road from Barbee Chapel Road west to Fordham Blvd.	2,553 LF sidepath extension
2	No sidepath along south side of NC 54/Raleigh Road from Hamilton Road west to Fordham Blvd.	970 LF sidepath extension
3	No sidewalk connection to Finley Golf Course Road on the south side of Prestwick Road.	396 LF sidewalk extension
4	No sidewalk on the east side of Barbee Chapel Road north of Spring Meadow Drive.	1,546 LF sidewalk extension
5	Existing sidepath along north side of NC 54/Raleigh Road ends just east of E. Barbee Chapel Road.	1,860 LF sidepath extension to Downing Creek Parkway
6	Existing sidepath along south side of NC 54/Raleigh Road ends 640 LF east of E. Barbee Chapel Road.	1,740 LF sidepath extension to Downing Creek Parkway

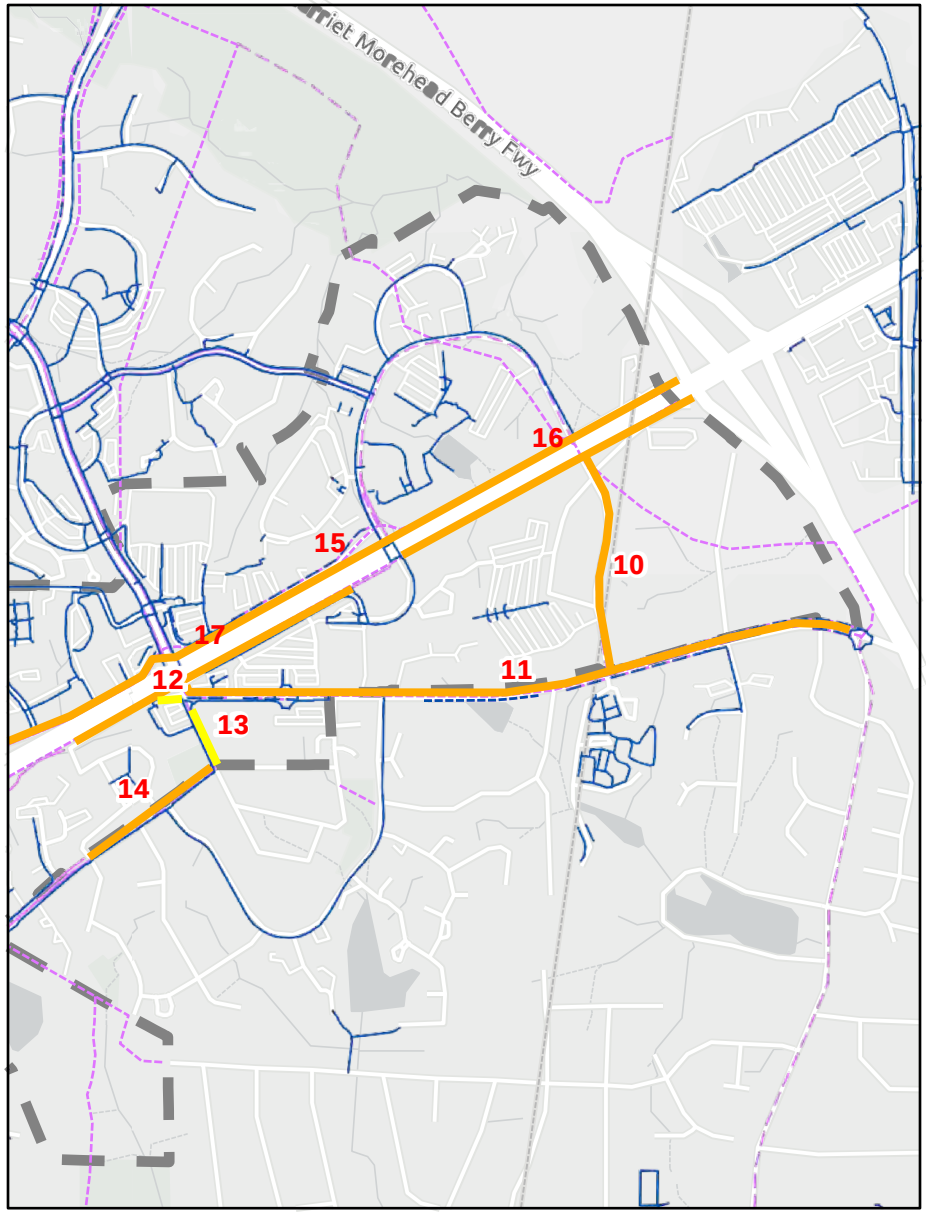
Focus Areas
Bike/Sidepath Gap
Sidewalk Gap
Existing Sidewalks
Planned Sidewalks
Existing Sidepaths
Planned Sidepaths
BRT Stations
Planned Alignment

0 0.25 Miles

*Walksheds not Represented as there are no confirmed BRT stations within the Focus Area

Network Gaps - Focus Area NC-54

Draft



No.	1Description	Recommendations/Transit Equity Recommendations
10	No sidepath along east side of Eastowne Drive from Durham- Chapel Hill Blvd. to Old Chapel Hill Road.	Construct 1,635 LF of sidepath
11	No sidepath along north side of Old Chapel Hill Road from Pope Road west to Scarlett Drive.	Construct 4,970 LF of sidepath
12	No sidewalk on the south side of Fordham Blvd. Service Road from Old Durham Road to frontage road	Construct 180 LF of sidewalk
13	No sidewalk on the east side of Scarlett Drive from Old Durham Road to Legion Road Extension.	Construct 440 LF of sidewalk
14	No sidepath on the north side of Legion Road from Scarlett Drive to Jackie Robinson Street.	Construct 1,110 LF of sidepath
15	No sidepath along north side of NC 501/Durham-Chapel Hill Blvd. from I-40 to Erwin Road.	Construct 6,174 LF sidepath
16	No sidepath along south side of NC 501/Durham-Chapel Hill Blvd. from I-40 to Eastowne Drive.	Construct 2,429 LF sidepath
17	No sidepath along south side of NC 501/Durham-Chapel Hill Blvd. from 430 LF west of Eastowne Drive to Greenfield Commons.	Construct 2,322 LF sidepath

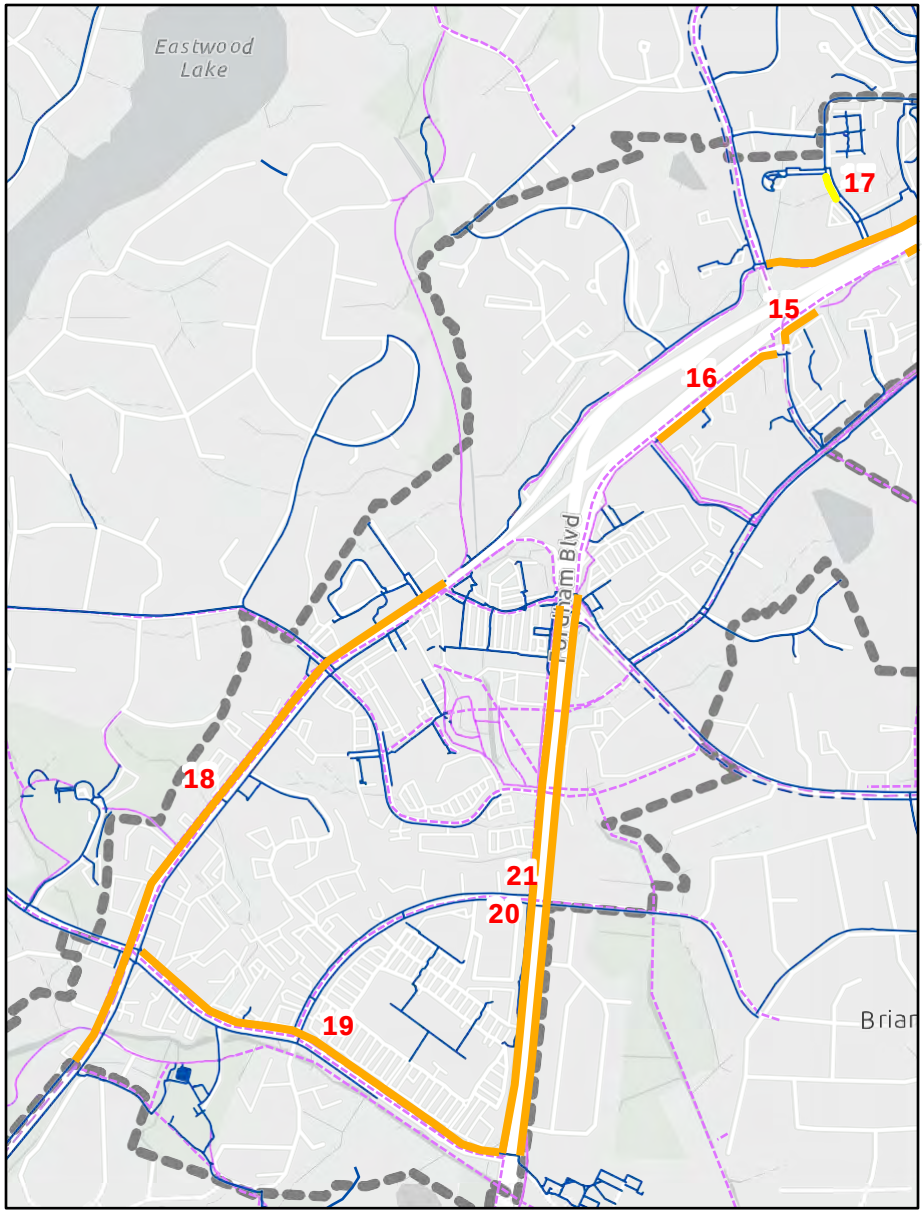
Focus Areas
Bike/Sidepath Gap
Sidewalk Gap
Existing Sidewalks
Planned Sidewalks
Existing Sidepaths
Planned Sidepaths
BRT Stations
Planned Alignment

0 0.25 Miles

*Walksheds not Represented as there are no confirmed BRT stations within the Focus Area

Network Gaps - Focus Area 15-501 North (A)

Draft



No.	Description	Recommendations/Transit Equity Recommendations
15	No sidepath east of Europa Drive on the south side of Durham-Chapel Hill Blvd.	Construct 360 LF of sidepath
16	No sidepath on the south side of the Service Road between Europa Drive and Novus Lane.	Construct 1,090 LF of sidepath
17	No sidewalk on the west side of Cosgrove Avenue between Turvey Court and Cosgrove Avenue.	Construct 180 LF of sidewalk
18	No sidepath on the west side of East Franklin Street from Eastgate Crossing to Dickerson Ct.	Construct 4,540 LF of sidepath
19	No sidepath on the north side of South Estes Drive from East Franklin Street to Fordham Blvd.	Construct 3,080 LF of sidepath
20	No sidepath on the west side of Fordham Blvd from Ephesus Church Road to S Estes Drive.	Construct 4,027 LF of sidepath
21	No sidepath on the east side of Fordham Blvd from Ephesus Church Road to S Estes Drive.	Construct 4,130 LF of sidepath

Focus Areas
Bike/Sidepath Gap
Sidewalk Gap
Existing Sidewalks
Planned Sidewalks
Existing Sidepaths
Planned Sidepaths
BRT Stations
Planned Alignment

*Walksheds not Represented as there are no confirmed BRT stations within the Focus Area

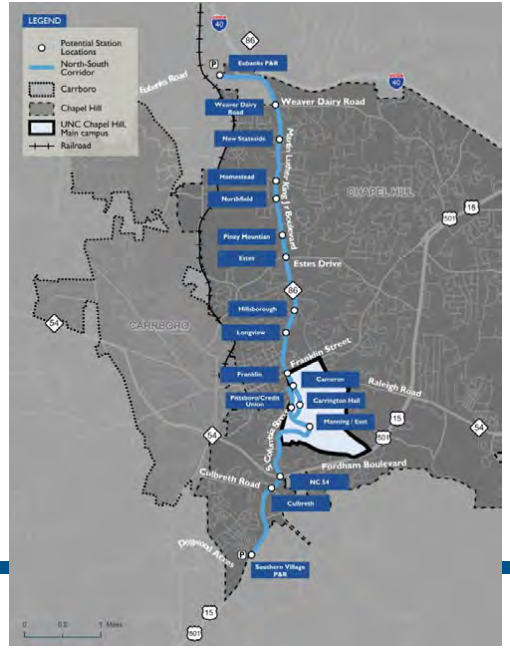
0 0.25 Miles

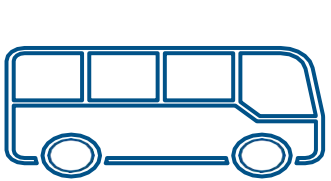
Network Gaps - Focus Area 15-501 North (B)

Draft

Chapel Hill TOD Planning & UDO Visioning

TOD Accessibility – Transportation Infrastructure Equity





Draft

SRF

Role of Transportation Equity Analysis

TOD Accessibility Analysis Context

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

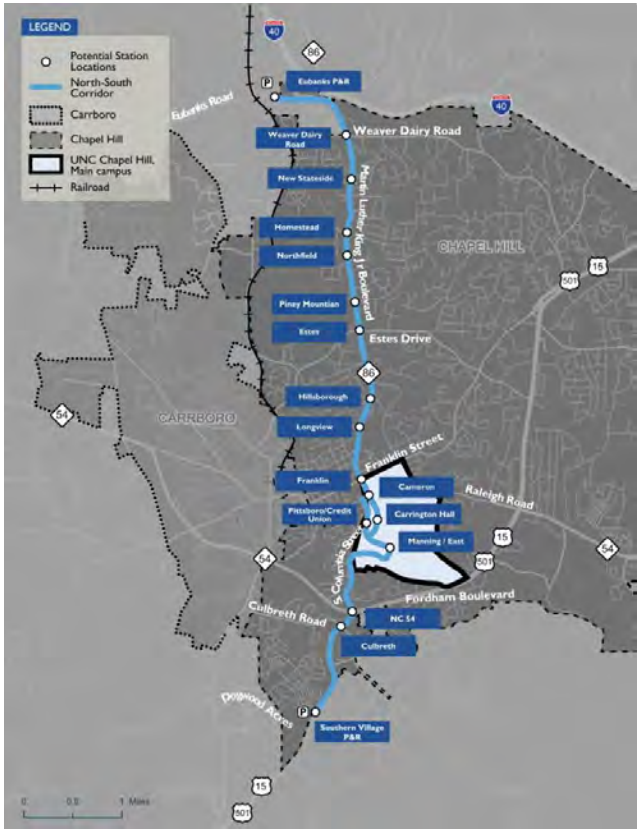
Equity Overlay

- Advance racial equity, community wealth building, climate resilience and public health goals
- Transportation Equity can be a driver of positive transformation for more vibrant, prosperous, and resilient neighborhoods connected to opportunities throughout the Town and region
- Outline mobility/infrastructure recommendations to build Town's capacity and future policies to support equitable projects and developments.

Draft

Importance of Equitable Investments

- Promotes fairness in mobility and accessibility to meet needs of ALL community members.
- Development occurring in transit-served locations can benefit all Chapel Hill residents
- Supports Town's community goals: building inclusive, sustainable and competitive community and "Complete Communities"
- Accessibly designed streets, wider sidewalks, enhanced signaling for individuals with impaired vision or hearing, create opportunities for pedestrians and those with disabilities.
- Complete Streets supports walking, bicycling, transit use, mobility devices or driving - improving health and safety



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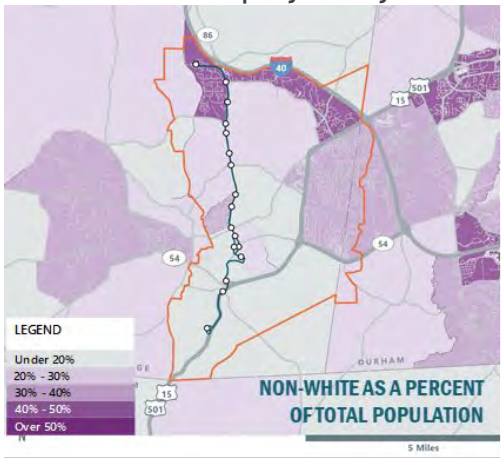
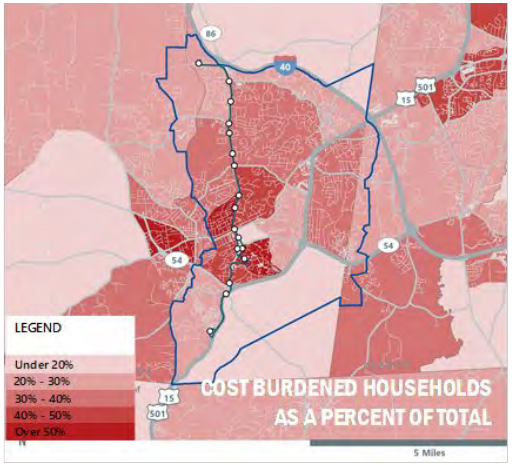
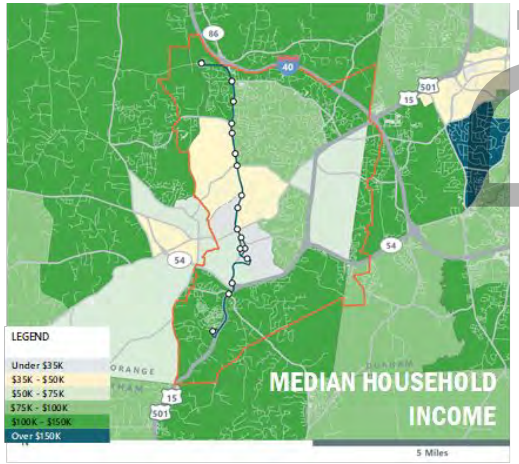
Strategies for Equitable Investments

- Improve pedestrian infrastructure in TOD Station Areas
- Prioritize resources based on need
- ADA project of inventory of sidewalk infrastructure with an equity lens
- Improve accessibility of transit signage and wayfinding: for people with disabilities or with a non-English first language
- Increase access to shared micro-mobility options, including bike-share and e-bikes
- Prioritize high-quality bicycle infrastructure to/from/within TOD Station Areas and Focus Areas
- Enhancing First and Last-Mile Connections to Transit - focusing on intersection improvements
- Include an equity analysis to benefits and burdens of future investment.







Draft

Equitable Investment Checklist

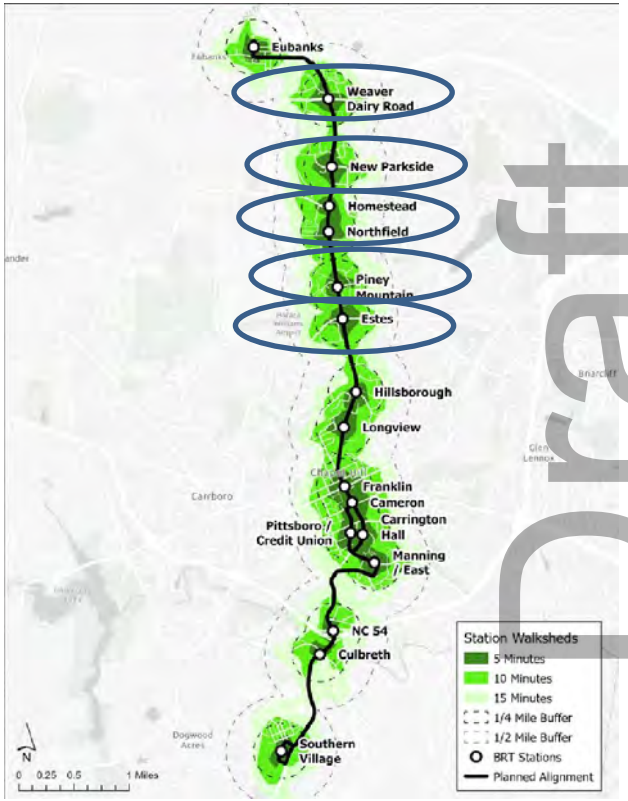
- ❑ Demographics, income levels, housing cost burdened household, vehicle ownership
- ❑ Bike and Ped Crash Data
- ❑ Mobility Audit (April 2022)
- ❑ Pedestrian and Bike Network gaps and barriers
- ❑ Chapel Hill Mobility and Connectivity Plan
- ❑ Easy access to services within 5–10-minute walk or bike ride
- ❑ Multi-modal connectivity, to and between, transit modes
- ❑ Incorporation of Complete Streets Principles
- ❑ Enhanced accessibility and universal design

Draft

- To be aligned to local socio-demographic data

Equity Priority Station Areas

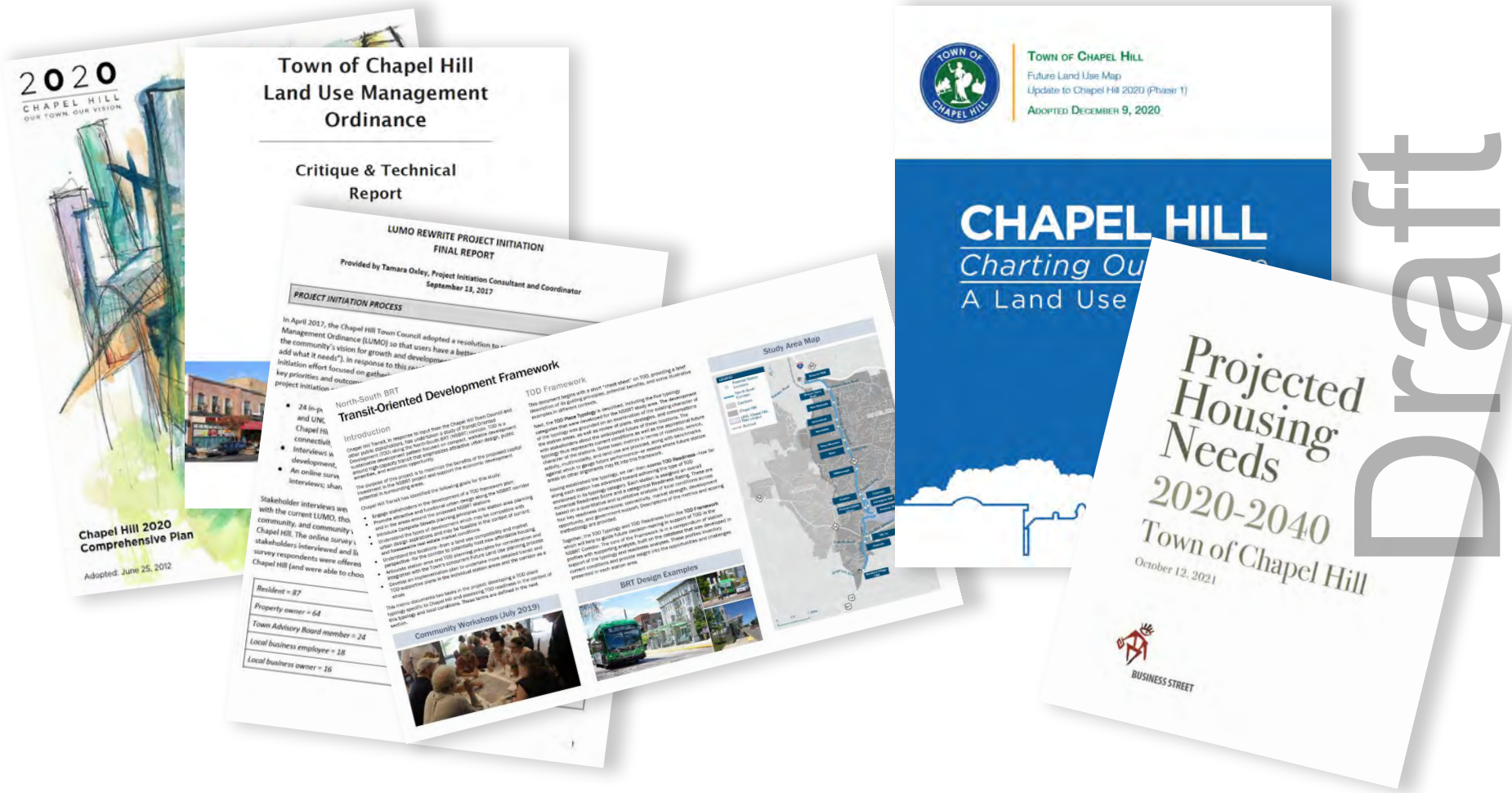
- Priorities based on gaps, barrier types, demographics, cost burdened analysis, median income data.
- Priorities focused on populations along N-S BRT Corridor and Focus Areas with greater needs, or preferences for bicycling and walking, including “last mile” trips to access transit.
- Priorities recommended on N-S BRT corridor locations with lower incomes and rates of vehicle ownership, may be more transit reliant and where bike and pedestrian connections to transit are needed.



Priority Accessibility Locations–based on equity

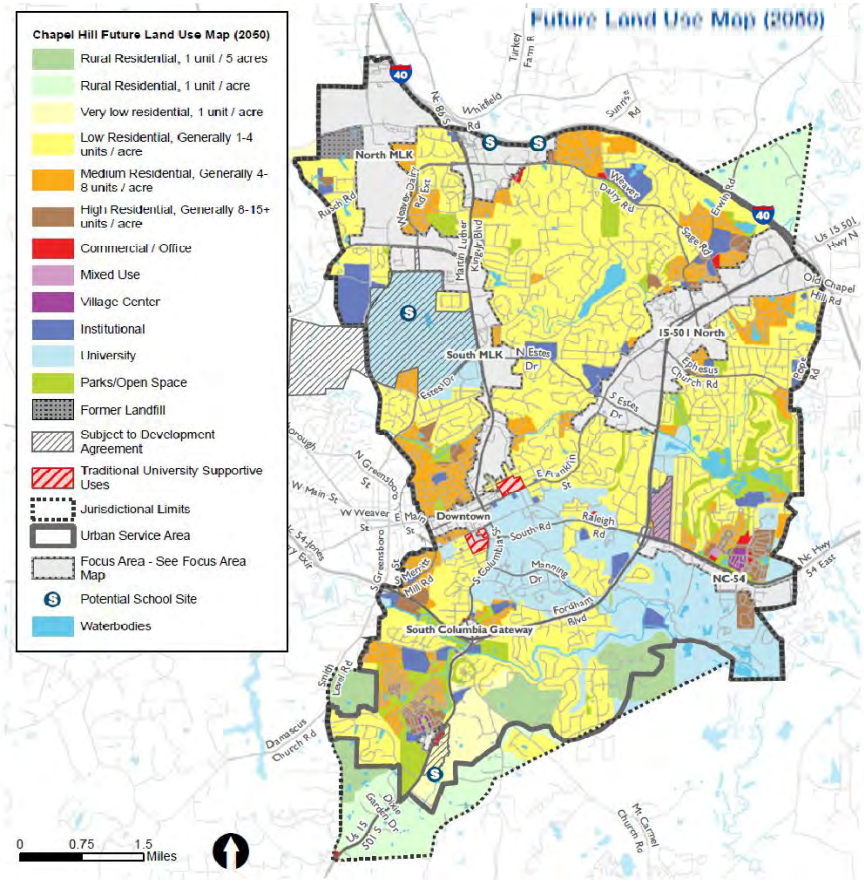
Plan Making Foundations

CHAPEL HILL PLANNING: 2012-2020



CHARTING OUR FUTURE: FUTURE LAND USE MAP (FLUM)

Update to Chapel Hill 2020 (Phase 1) December 2020

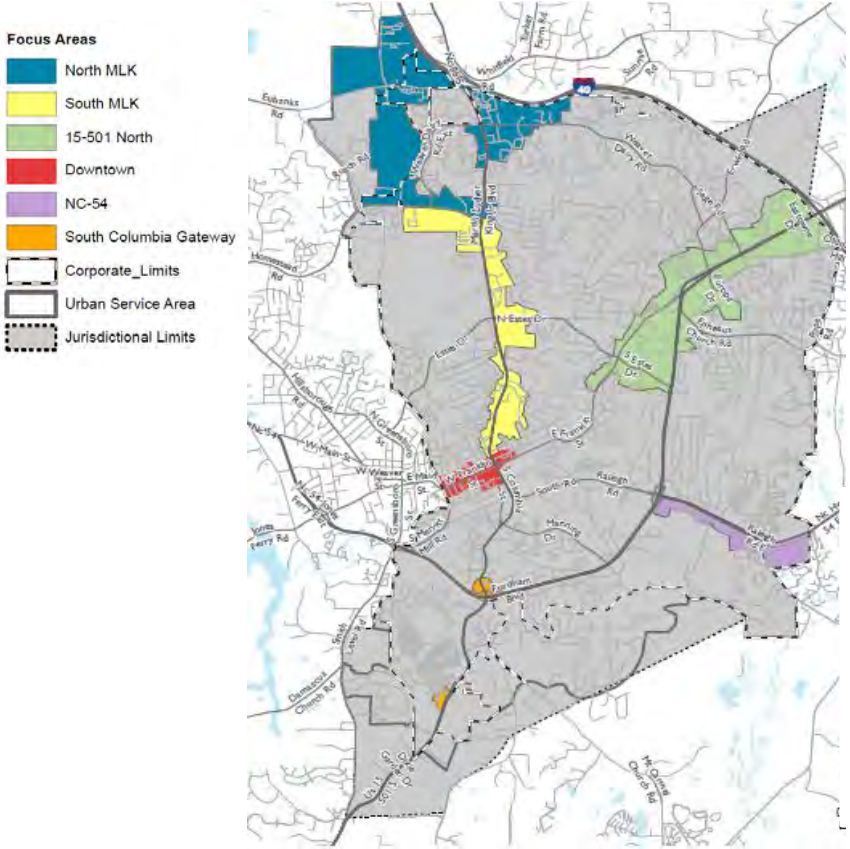


"The Future Land Use Map depicts a snapshot into the future of the Town's preferred future mix of land uses… generally guide the Town as to where shopping, houses, apartments, townhomes, offices, and parks should be located"

Draft

FLUM FOCUS AREAS

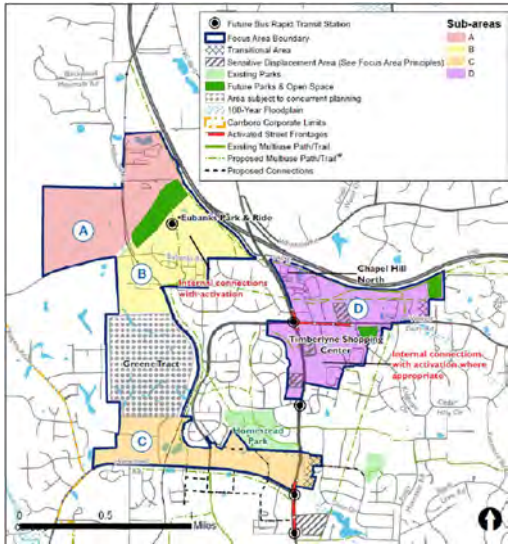
Update to Chapel Hill 2020 (Phase 1) 2020: Focus Areas

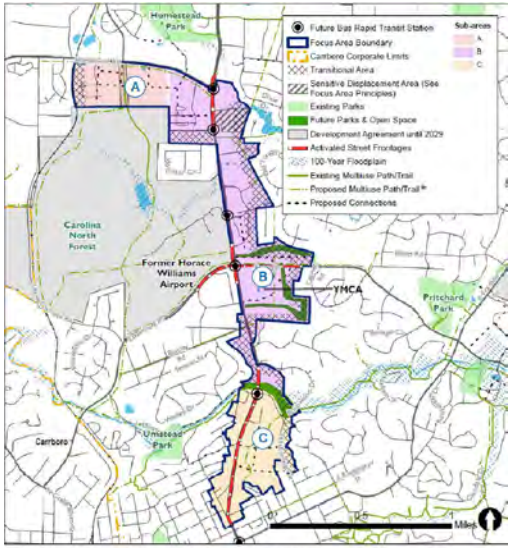


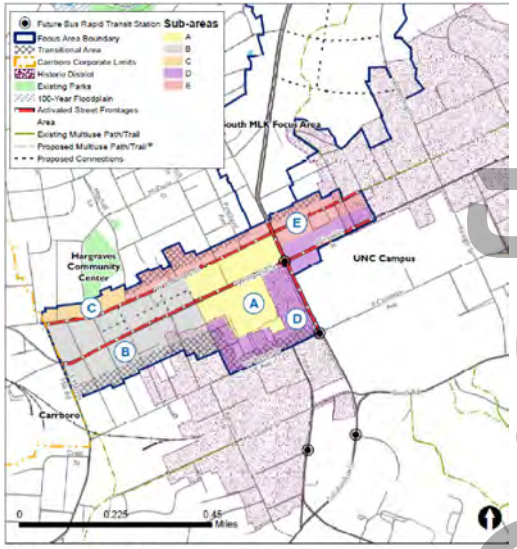
"a vision for the area, a matrix of the preferred and discouraged land uses (described as Character Types) and desirable building heights, a description of the desired form of development, and a set of Focus Area Principles tailored to the unique circumstances of the area."

Draft

FLUM FOCUS AREAS: MLK CORRIDOR + DOWNTOWN







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

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

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	4-6 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

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	4-6 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

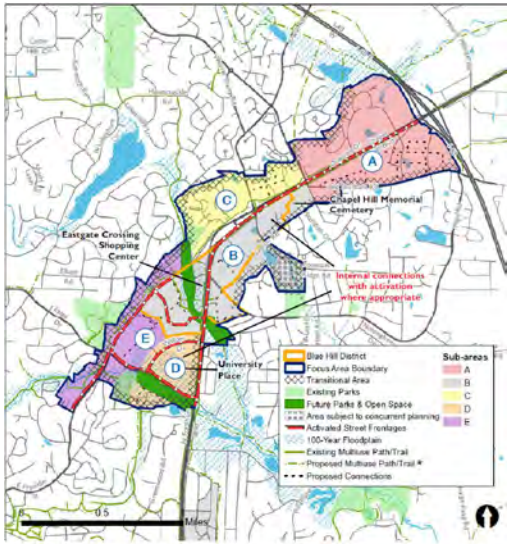
● Primary (predominant land uses) ◉ Secondary (appropriate, but not predominant) ⊖ Discouraged

	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 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 6 stories allowed on the south side of E Rosemary and 8 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.

Draft

FLUM FOCUS AREAS: 15-501 + NC54



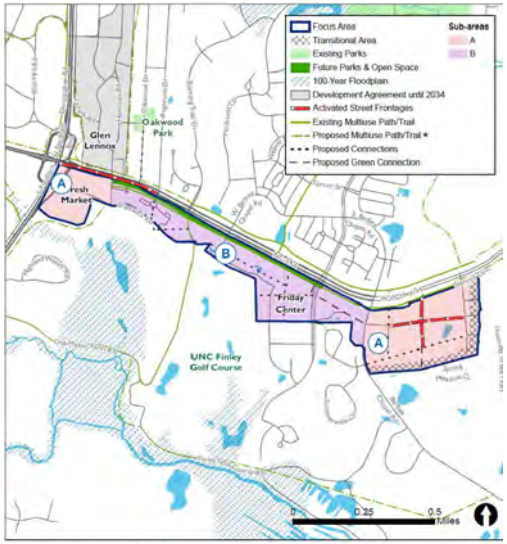
* See Mobility Plan for more information about proposed multi-modal improvements

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

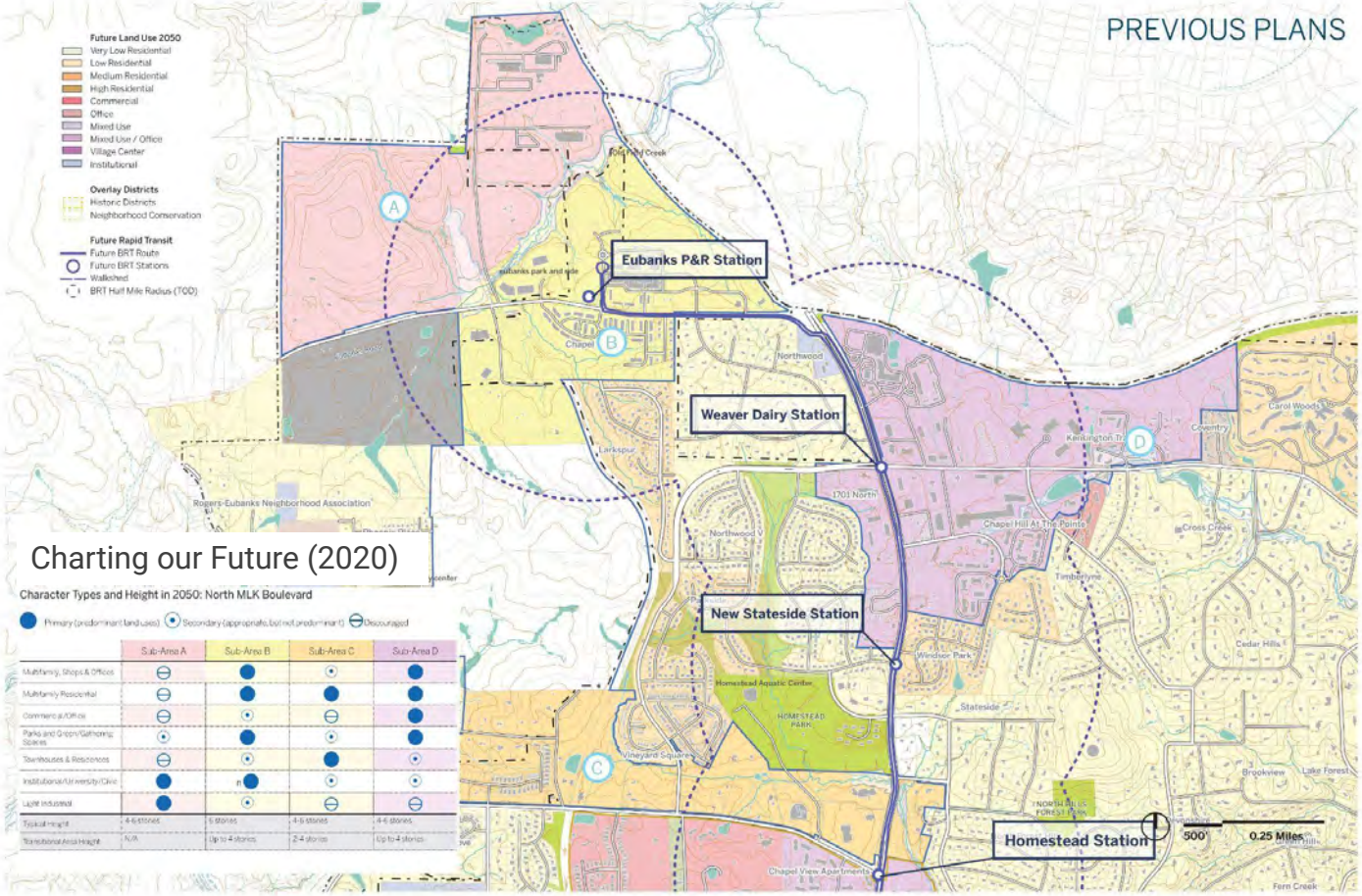
Note: Each story is approximately 12 feet tall, but height may vary based on many factors. While suggested heights are noted above, determining the appropriate height for each site will require careful examination of the site and its surrounding context.

Draft

MLK North

MLK NORTH: RECENT PLANS AND PROPOSALS

PREVIOUS PLANS



Charting our Future (2020)

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	⊖	●	●	●
Commerce & Office	⊖	○	⊖	●
Parks and Green/Gathering Spaces	○	●	○	●
Townhouses & Residences	⊖	○	●	○
Institutional/University/Civic	●	●	○	○
Light Industrial	●	○	⊖	⊖
Typical Height	4-6 stories	5 stories	4-6 stories	4-6 stories
Transitional Area Height	N/A	Up to 4 stories	2-4 stories	Up to 4 stories

TOD Assessment (2020)

Eubanks Road Park & Ride

Typology: Regional Crossroads

- Emerging center of development due to high transportation accessibility
- Significant ridership
- Medium-high density with further development expected
- Balance between auto-access transit and emerging mixed-use TOD

Readiness: Emerging

Scoring:

Connectivity	Low
Market Strength	Low
Development Opportunity	High
Government Support	Medium

Weaver Dairy

Typology: Regional Crossroads

- Emerging center of development due to high transportation accessibility
- Significant ridership
- Medium-high density with further development expected
- Balance between auto-access transit and emerging mixed-use TOD

Readiness: Ready

Scoring:

Connectivity	Medium
Market Strength	Medium
Development Opportunity	Medium
Government Support	Medium

New Stateside

Typology: Neighborhood TOD

- Local node primarily serving nearby residential population
- Moderate density
- Neighborhood-scale commercial uses supporting residents

Readiness: Long-Term

Scoring:

Connectivity	Low
Market Strength	Medium
Development Opportunity	Low
Government Support	Low

Homestead

Typology: Neighborhood TOD

- Local node primarily serving nearby residential population
- Moderate density
- Neighborhood-scale commercial uses supporting residents

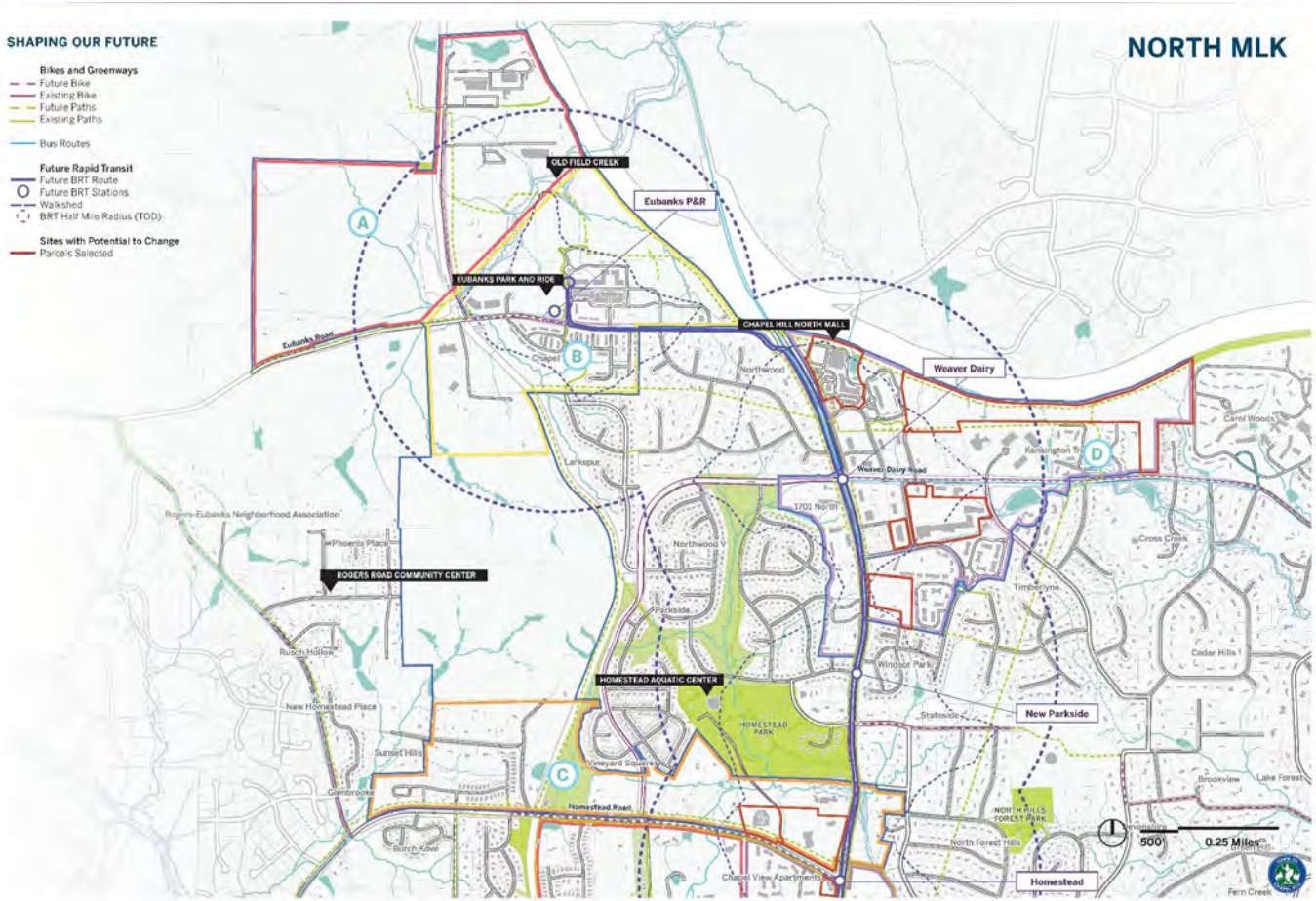
Readiness: Emerging

Scoring:

Connectivity	Medium
Market Strength	Low
Development Opportunity	Medium
Government Support	Medium

Draft

POTENTIAL FUTURE CHANGE LOCATIONS



Opportunity Types

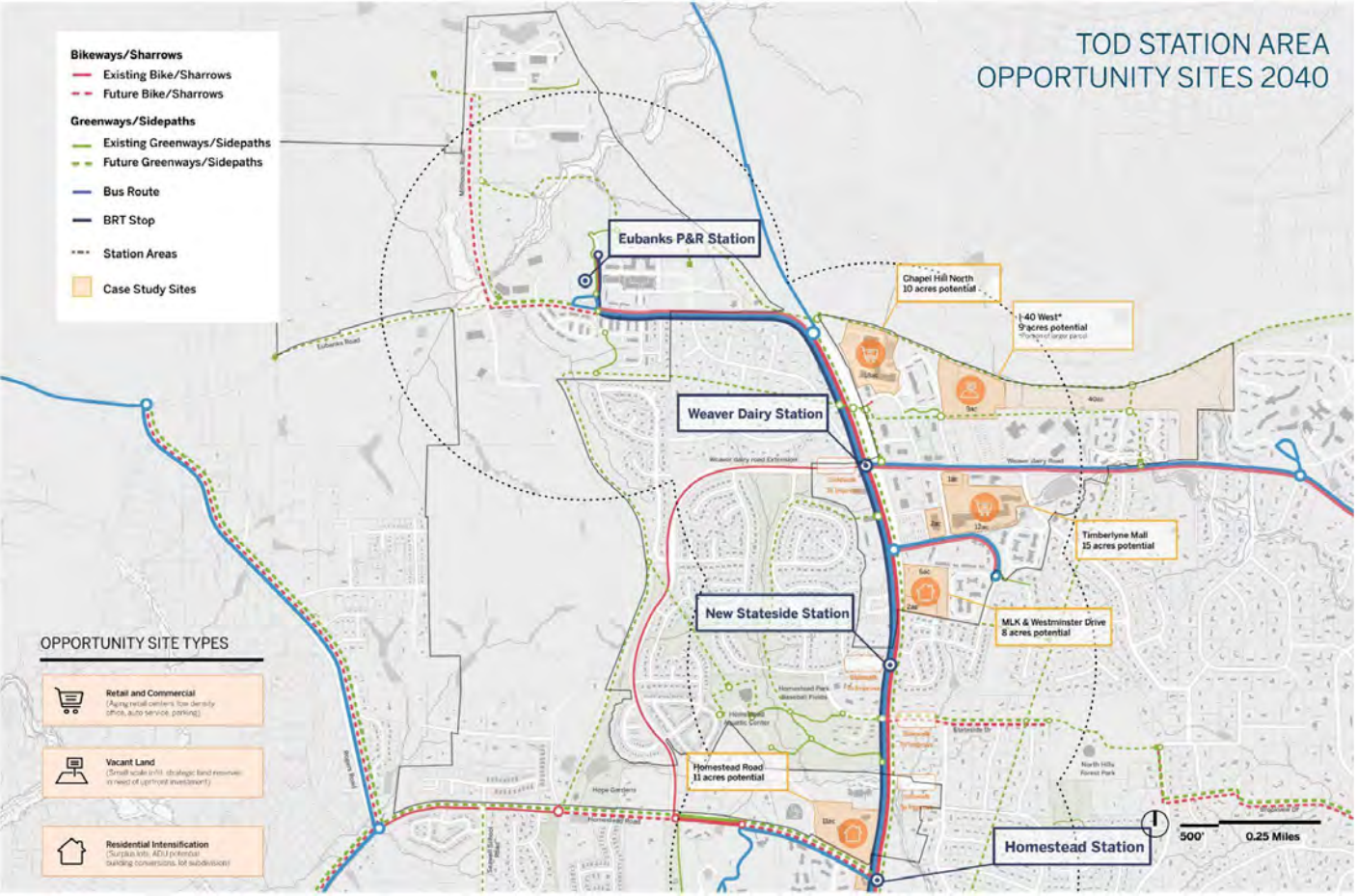
RETAIL + COMMERCIAL
Aging retail centers
Office: Low density, smaller, aging
Auto service: wash, tire, oil, gas
Attached parking

VACANT LAND
Small scale infill
Strategic land reserves

RESIDENTIAL INTENSIFICATION
Surplus lots
ADU potential
Building conversions
Lot subdivision

Draft

POTENTIAL FUTURE CHANGE LOCATIONS



Opportunity Types

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

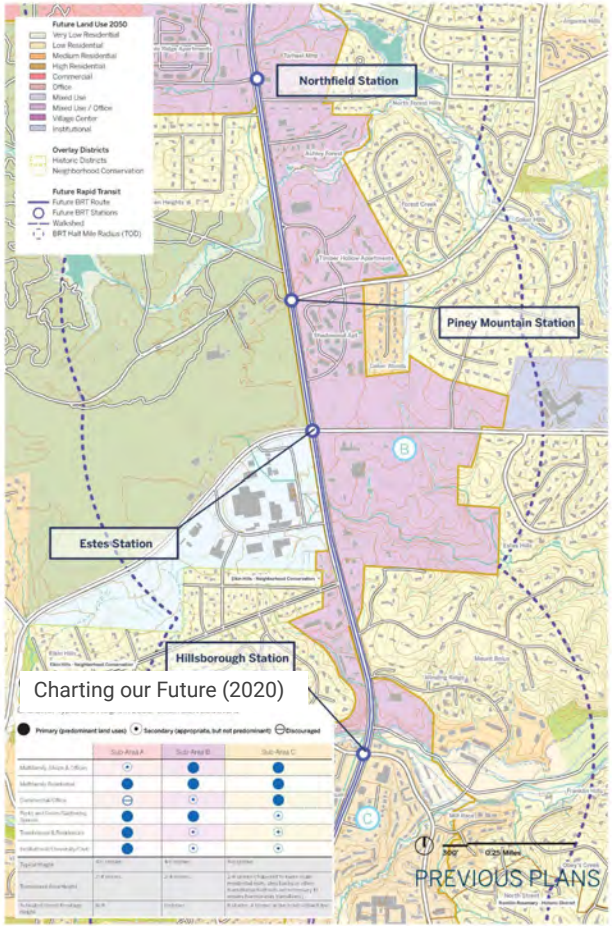
VACANT LAND
Small scale infill
Strategic land reserves

RESIDENTIAL INTENSIFICATION
Surplus lots
ADU potential
Building conversions
Lot subdivision

Draft

MLK South

MLK SOUTH: RECENT PLANS AND PROPOSALS



TOD Assessment 2020

Northfield

Typology:

Neighborhood TOD

- Local node primarily serving nearby residential population
- Moderate density
- Neighborhood-scale commercial uses supporting residents

Readiness:

Long-Term

Scoring:

Connectivity	Low
Market Strength	Low
Development Opportunity	Medium
Government Support	Low

Piney Mountain

Typology:

Carolina North

- Expected urban center predicated on UNC expansion
- Significant ridership opportunity
- Expectation of high density with transit-friendly mix of land uses near station
- Multi-purpose trip destination, with institutional uses within walking distance

Readiness:

Long-Term

Scoring:

Connectivity	Low
Market Strength	Low
Development Opportunity	Medium
Government Support	Low

Estes

Typology:

Carolina North

- Expected urban center predicated on UNC expansion
- Significant ridership opportunity
- Expectation of high density with transit-friendly mix of land uses near station
- Multi-purpose trip destination, with institutional uses within walking distance

Readiness:

Emerging

Scoring:

Connectivity	Low
Market Strength	Medium
Development Opportunity	High
Government Support	Medium

Hillsborough

Typology:

Neighborhood TOD

- Local node primarily serving nearby residential population
- Moderate density
- Neighborhood-scale commercial uses supporting residents

Readiness:

Ready

Scoring:

Connectivity	Medium
Market Strength	High
Development Opportunity	Low
Government Support	Medium

Draft

POTENTIAL FUTURE CHANGE LOCATIONS

Opportunity Types

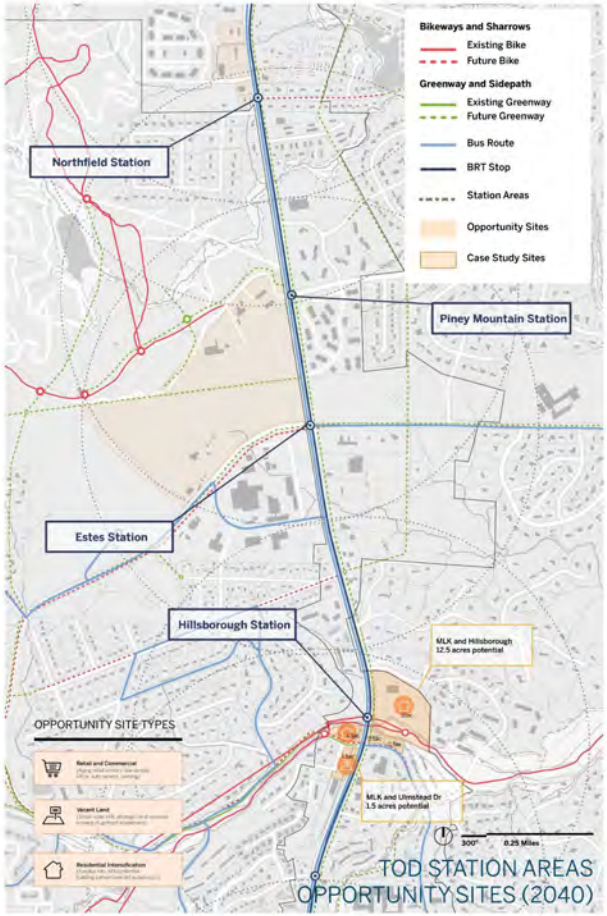
RETAIL + COMMERCIAL
Aging retail centers
Office: Low density, smaller, aging
Auto service: wash, tire, oil, gas
Attached parking

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

RESIDENTIAL INTENSIFICATION
Surplus lots
ADU potential
Building conversions
Lot subdivision

Draft

POTENTIAL FUTURE CHANGE LOCATIONS



Opportunity Types

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

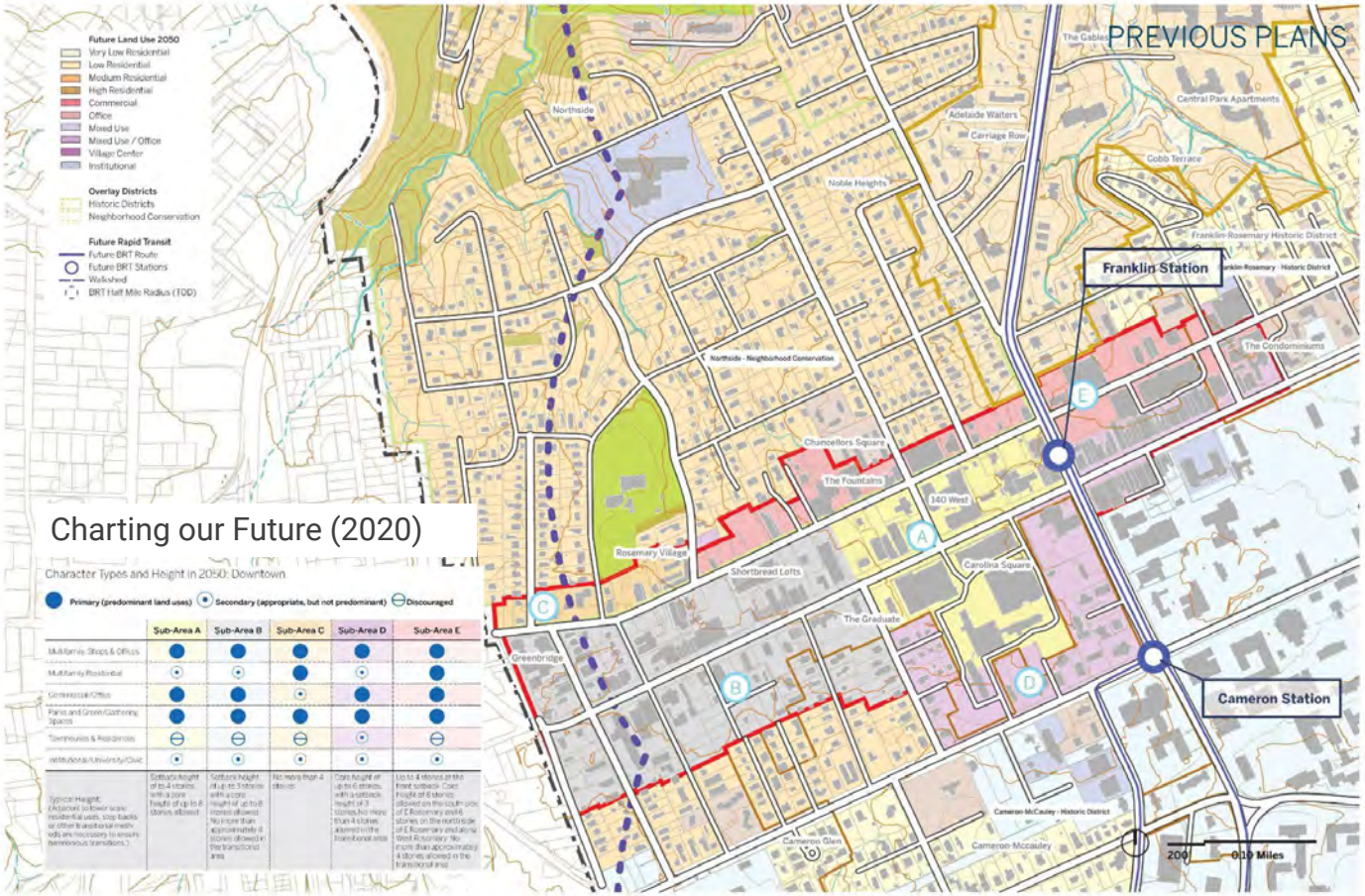
VACANT LAND
Small scale infill
Strategic land reserves (needing larger upfront investment)

RESIDENTIAL INTENSIFICATION
Surplus lots
ADU potential
Building conversions
Lot subdivision

Draft

Downtown TOD Station Areas and Focus Area

DOWNTOWN: RECENT PLANS AND PROPOSALS



Charting our Future (2020)

TOD Assessment 2020

Franklin

Typology:
Central Core
- Primary urban center
- Highest density
- High ridership
- Greatest diversity of land uses

Readiness:
Arrived

Scoring:

Connectivity	High
Market Strength	High
Development Opportunity	Medium
Government Support	High

Cameron

Typology:
Central Core
- Primary urban center
- Highest density
- High ridership
- Greatest diversity of land uses

Readiness:
Arrived

Scoring:

Connectivity	High
Market Strength	High
Development Opportunity	Low
Government Support	High

Carrington Hall / Pittsboro / Credit Union

Typology:
Central Core
- Primary urban center
- Highest density
- High ridership
- Greatest diversity of land uses

Readiness:
Ready

Scoring:

Connectivity	Medium
Market Strength	High
Development Opportunity	Medium
Government Support	High

Manning / East

Typology:
Medical Center
- Predominant single-use destination
- Regionally significant trip generator, driving high ridership
- Generally unsuited to mixed-use TOD

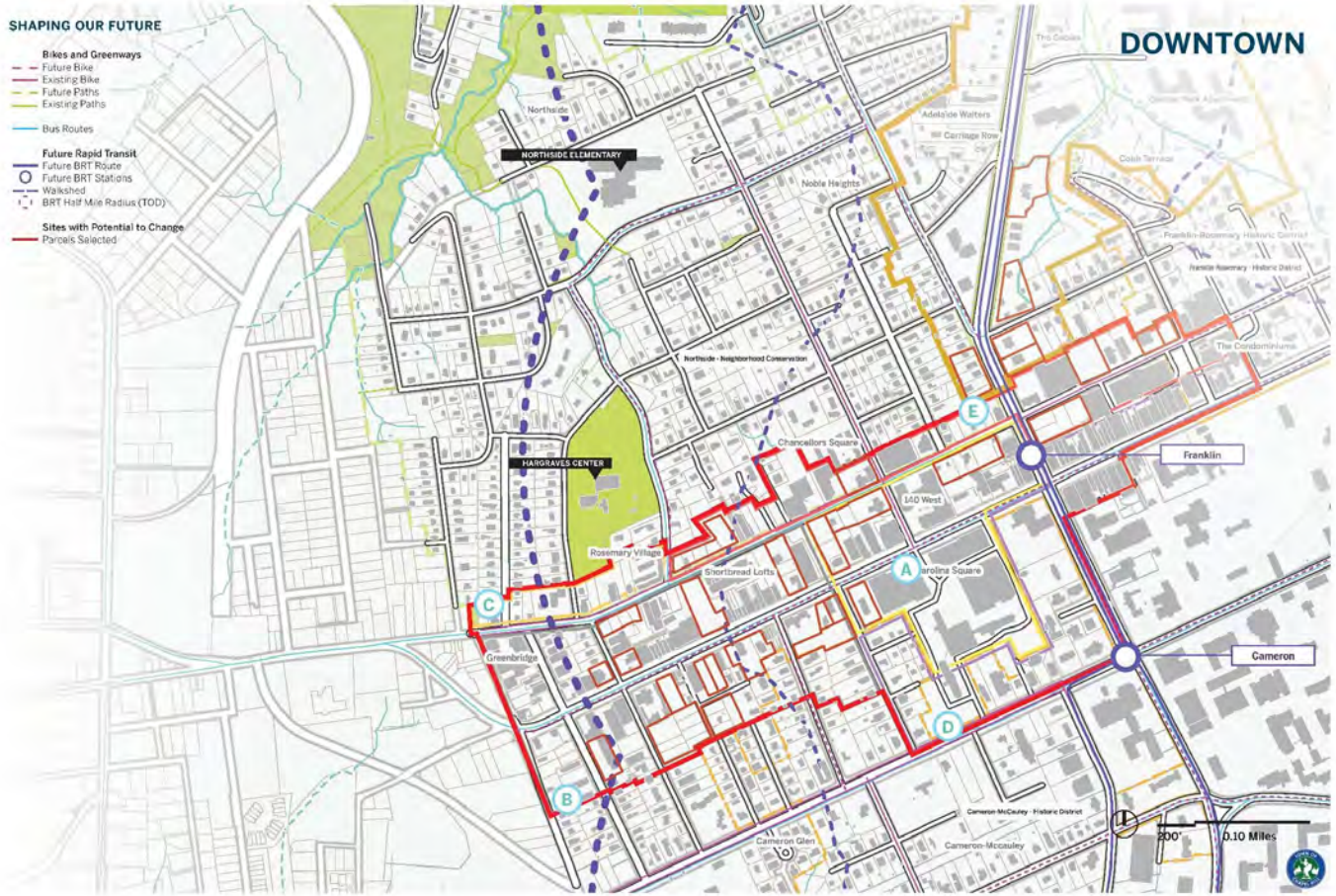
Readiness:
Ready

Scoring:

Connectivity	Medium
Market Strength	Medium
Development Opportunity	High
Government Support	High

Draft

DOWNTOWN: POTENTIAL FUTURE CHANGE



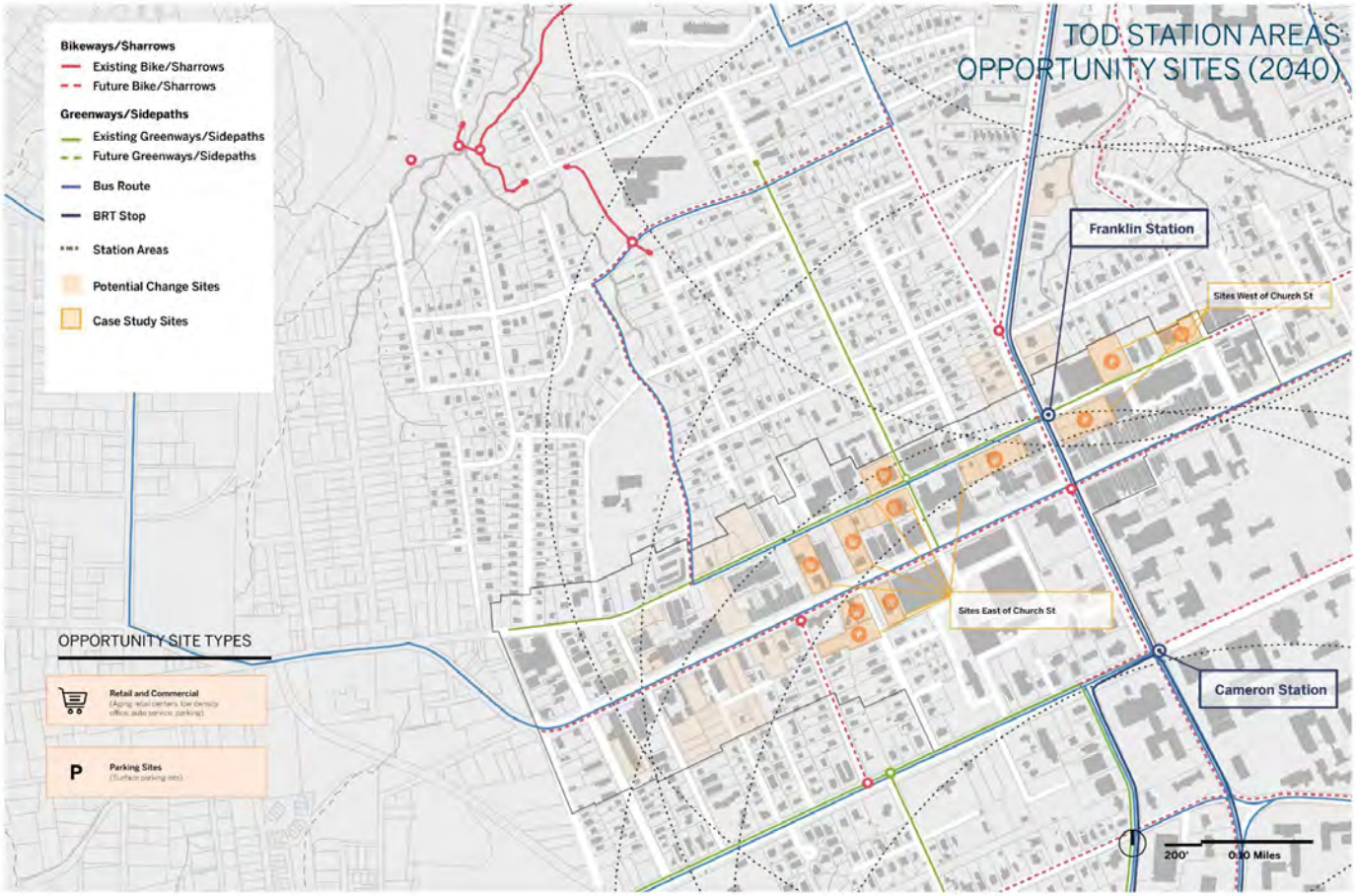
Opportunity Types

PARKING SITES
Surface parking lots

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

Draft

DOWNTOWN: POTENTIAL FUTURE CHANGE



Opportunity Types

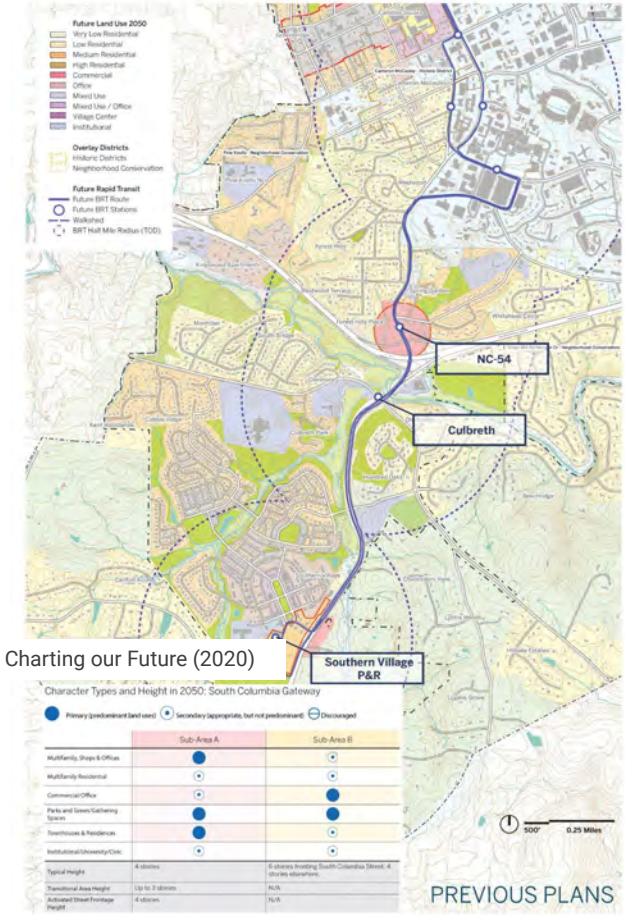
PARKING SITES
Surface parking lots

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

Draft

South Columbia Focus Area

SOUTH COLUMBIA: RECENT PLANS AND PROPOSALS



Charting our Future (2020)

Major retail and commercial center

Important gateway from I-40

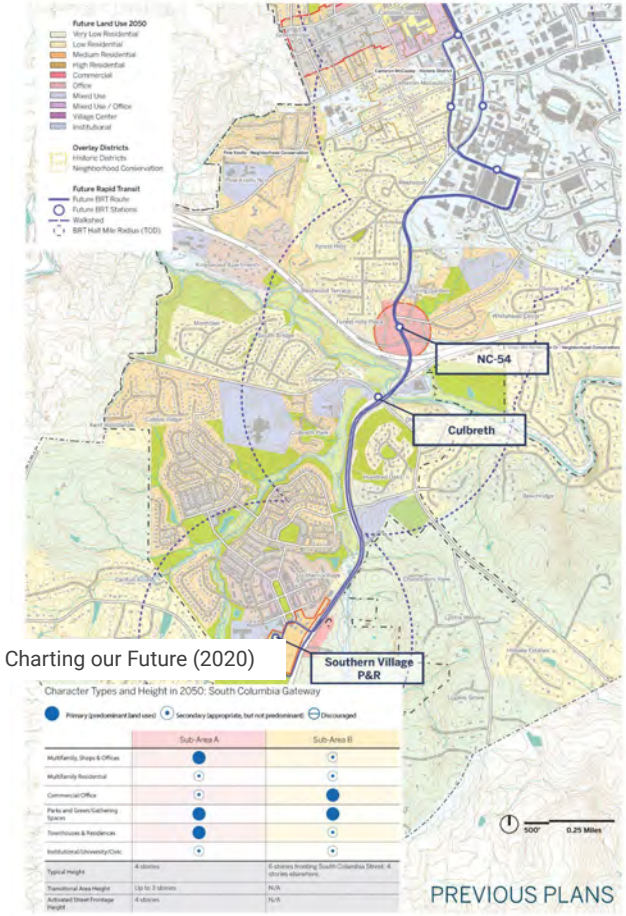
Higher density housing, commercial, and mixed-use developments

Active development interest

Surrounded by single family neighborhoods

Draft

SOUTH COLUMBIA: RECENT PLANS AND PROPOSALS



Charting our Future (2020)

PREVIOUS PLANS

TOD Assessment 2020

NC 54

Typology:

Regional Crossroads

- Emerging center of development due to high transportation accessibility
- Significant ridership
- Medium-high density with further development expected
- Balance between auto-access, transit and emerging mixed-use TOD

Readiness:

Emerging

Scoring:

Connectivity	Medium
Market Strength	Medium
Development Opportunity	Low
Government Support	Low

Culbreth

Typology:

Neighborhood TOD

- Local node primarily serving nearby residential population
- Moderate density
- Neighborhood-scale commercial uses supporting residents

Readiness:

Long-Term

Scoring:

Connectivity	Low
Market Strength	Low
Development Opportunity	Low
Government Support	Low

Southern Village Park & Ride

Typology:

Regional Crossroads

- Emerging center of development due to high transportation accessibility
- Significant ridership
- Medium-high density with further development expected
- Balance between auto-access, transit and emerging mixed-use TOD

Readiness:

Ready

Scoring:

Connectivity	High
Market Strength	Low
Development Opportunity	High
Government Support	Medium

Draft

POTENTIAL FUTURE CHANGE LOCATIONS

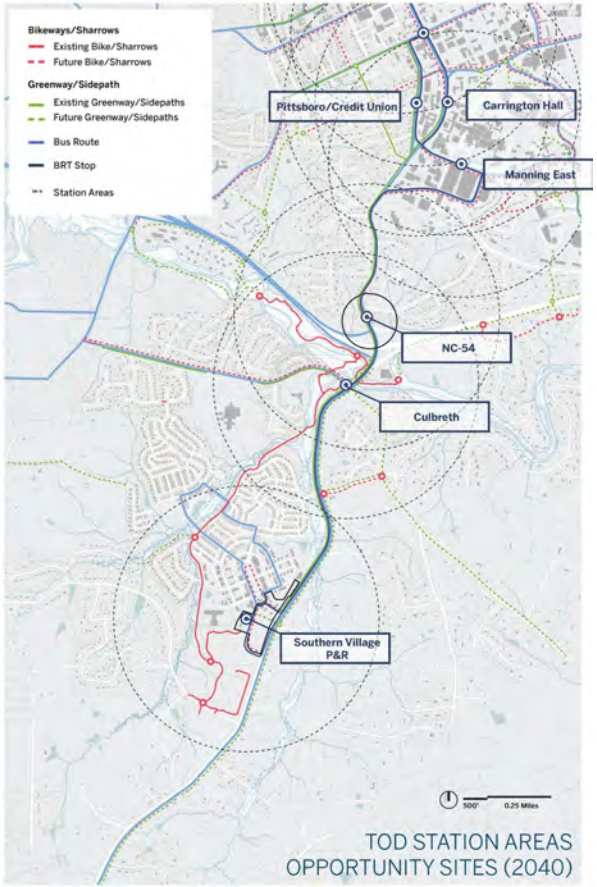
Opportunity Types

VACANT LAND
Small scale infill
Strategic land reserves

RESIDENTIAL INTENSIFICATION
Surplus lots
ADU potential
Building conversions
Lot subdivision

Draft

POTENTIAL FUTURE CHANGE LOCATIONS



Opportunity Types

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Small scale infill
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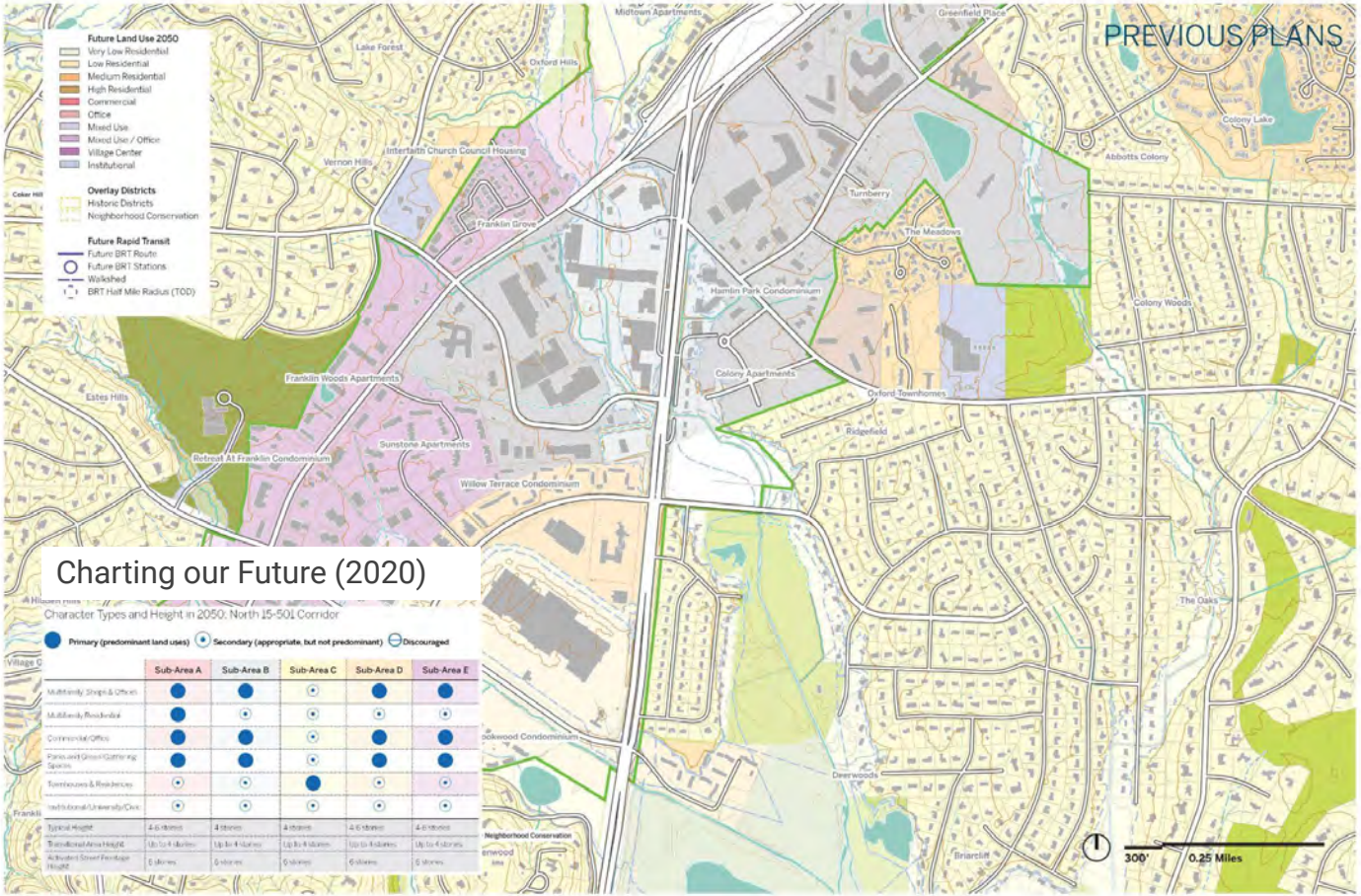
15-501 Focus Area

15-501 SOUTH: RECENT PLANS AND PROPOSALS



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

Draft

15-501 SOUTH: POTENTIAL FUTURE CHANGE

Opportunity Types

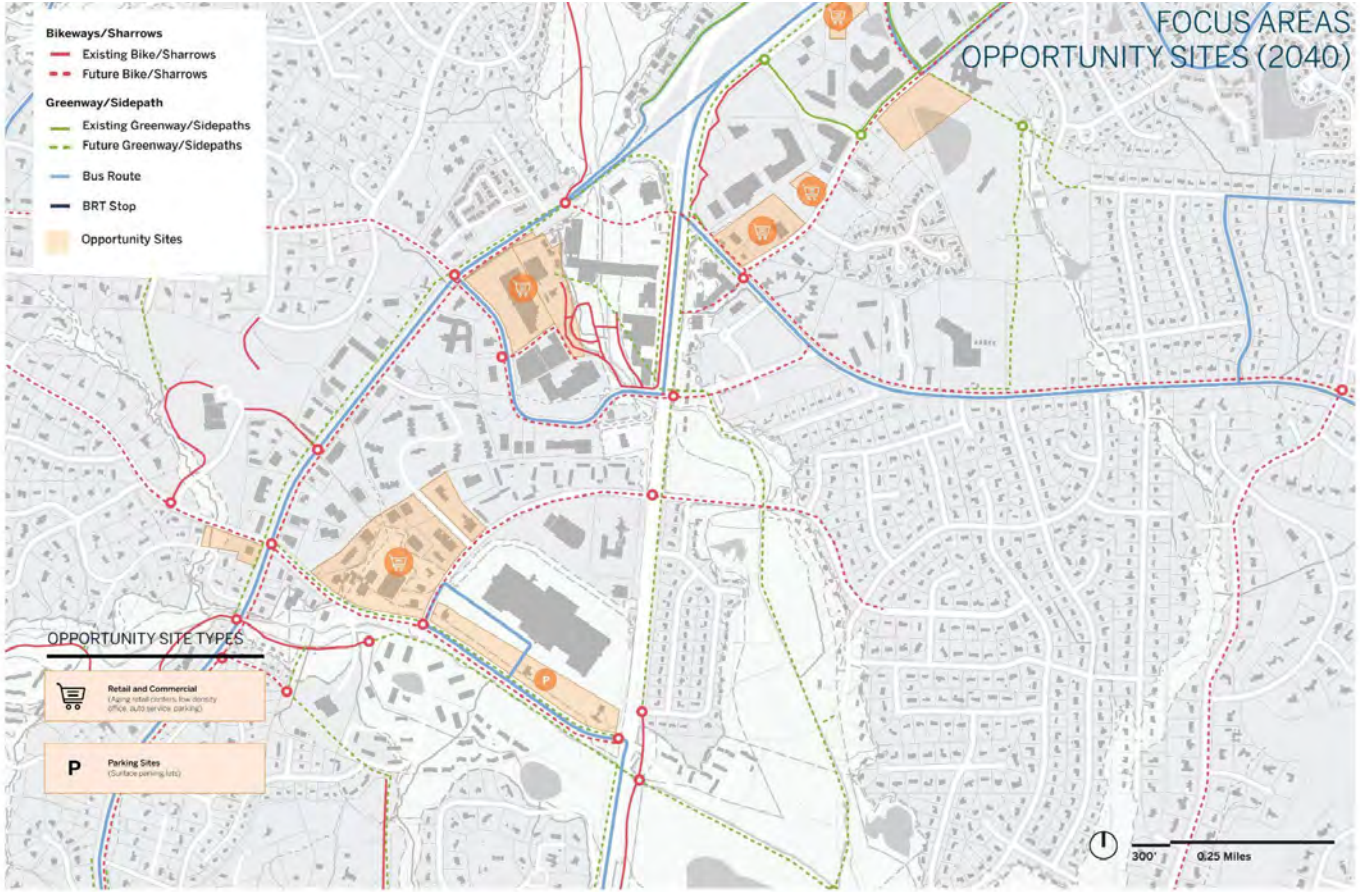
RETAIL + COMMERCIAL
Aging retail centers
Office: Low density, smaller, aging
Auto service: wash, tire, oil, gas
Attached parking

VACANT LAND
Small scale infill
Strategic land reserves

RESIDENTIAL INTENSIFICATION
Surplus lots
ADU potential
Building conversions
Lot subdivision

Draft

15-501 SOUTH: POTENTIAL FUTURE CHANGE



Opportunity Types

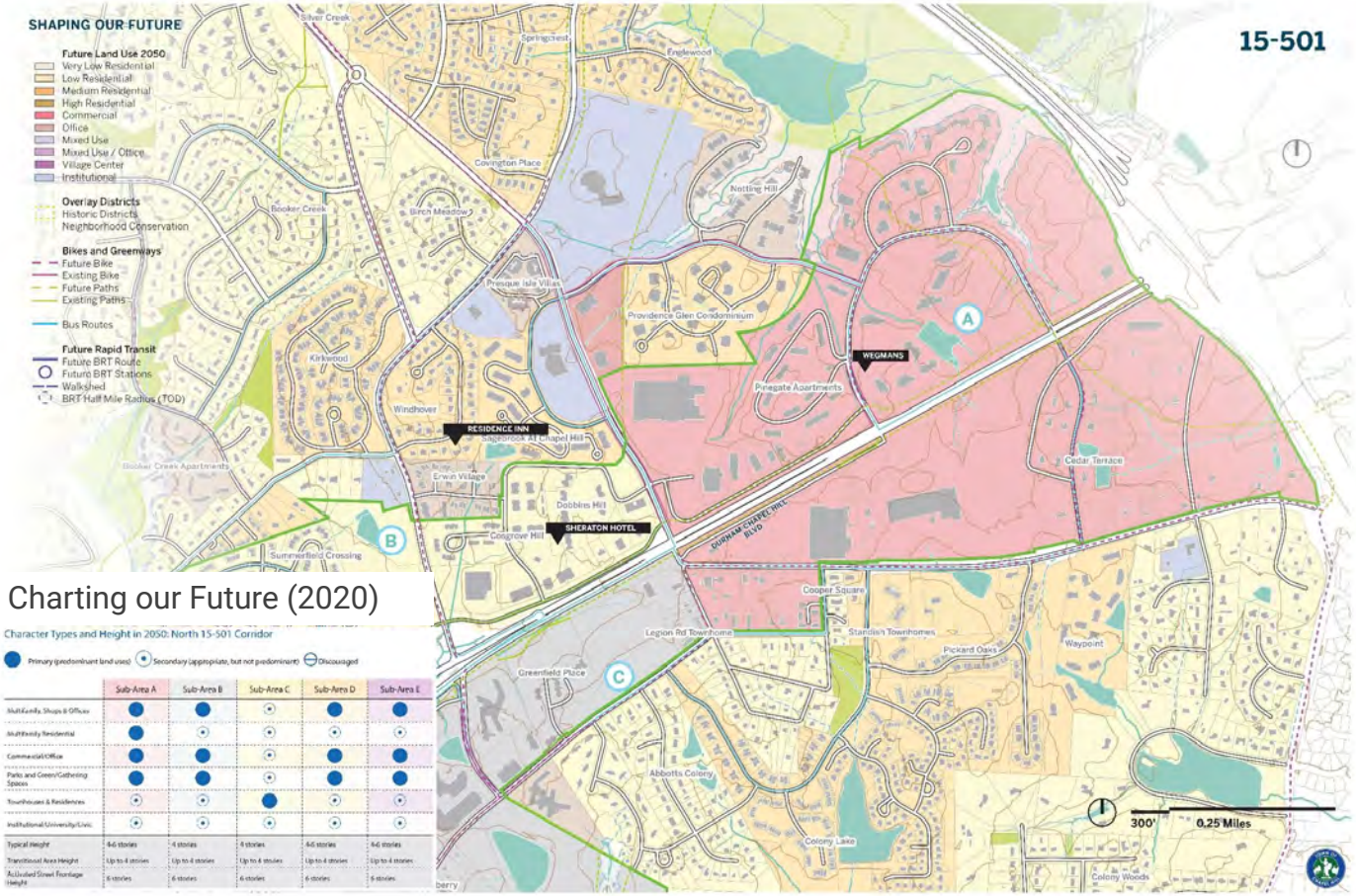
RETAIL + COMMERCIAL
Aging retail centers
Office: Low density, smaller, aging
Auto service: wash, tire, oil, gas
Attached parking

VACANT LAND
Small scale infill
Strategic land reserves

RESIDENTIAL INTENSIFICATION
Surplus lots
ADU potential
Building conversions
Lot subdivision

Draft

15-501 EAST: 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

Draft

15-501 EAST: POTENTIAL FUTURE CHANGE LOCATIONS

Opportunity Types

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

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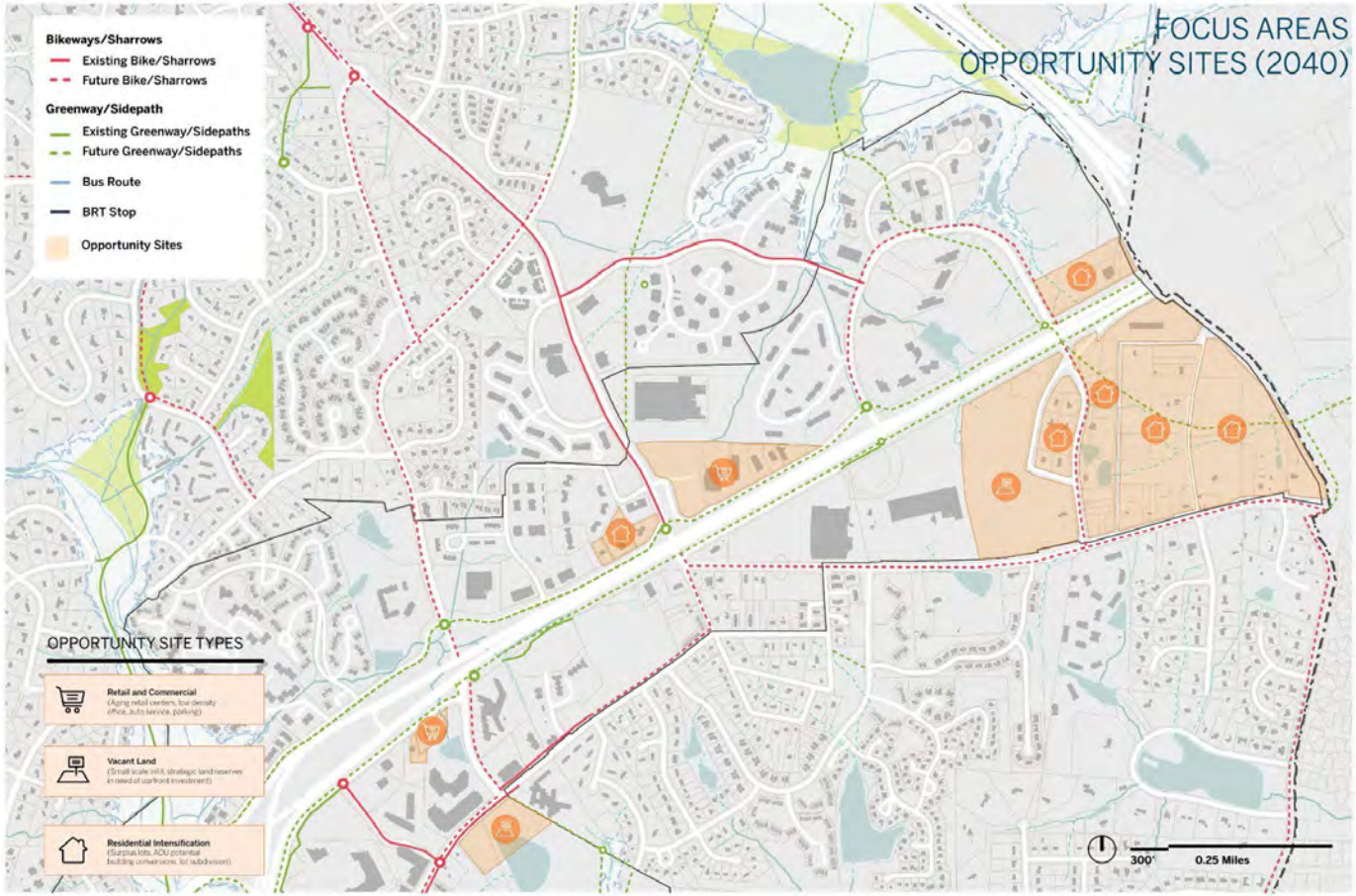
Small scale infill
Strategic land reserves

RESIDENTIAL INTENSIFICATION
Surplus lots
ADU potential
Building conversions
Lot subdivision

Draft

15-501 EAST: POTENTIAL FUTURE CHANGE LOCATIONS



Opportunity Types

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Office: Low density, smaller, aging
Auto service: wash, tire, oil, gas
Attached parking

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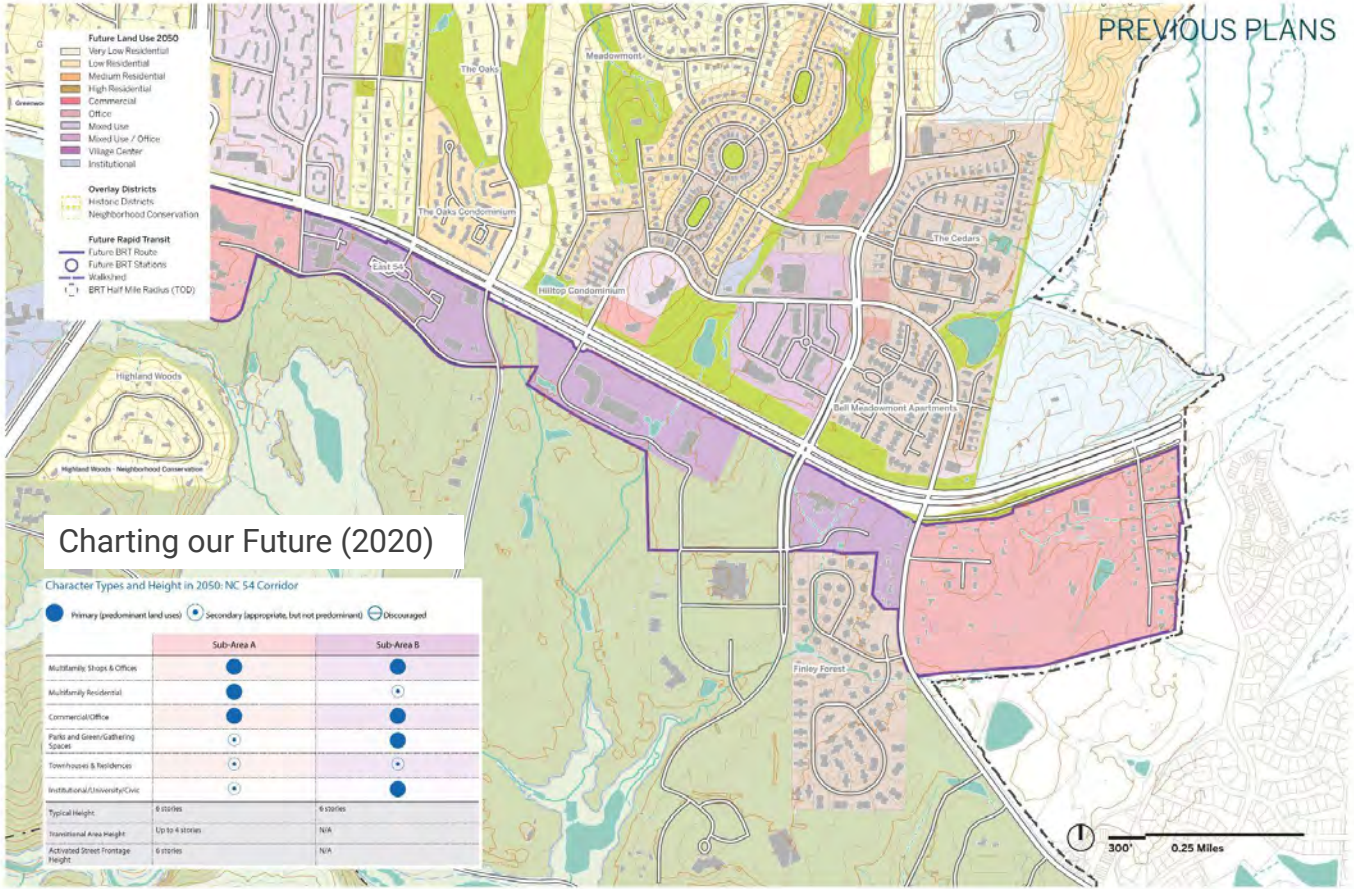
RESIDENTIAL INTENSIFICATION
Surplus lots
ADU potential
Building conversions
Lot subdivision

Draft

NC-54 Focus Area

NC54: RECENT PLANS AND PROPOSALS



Established and anticipated employment centers

Major gateway to the Town from the east

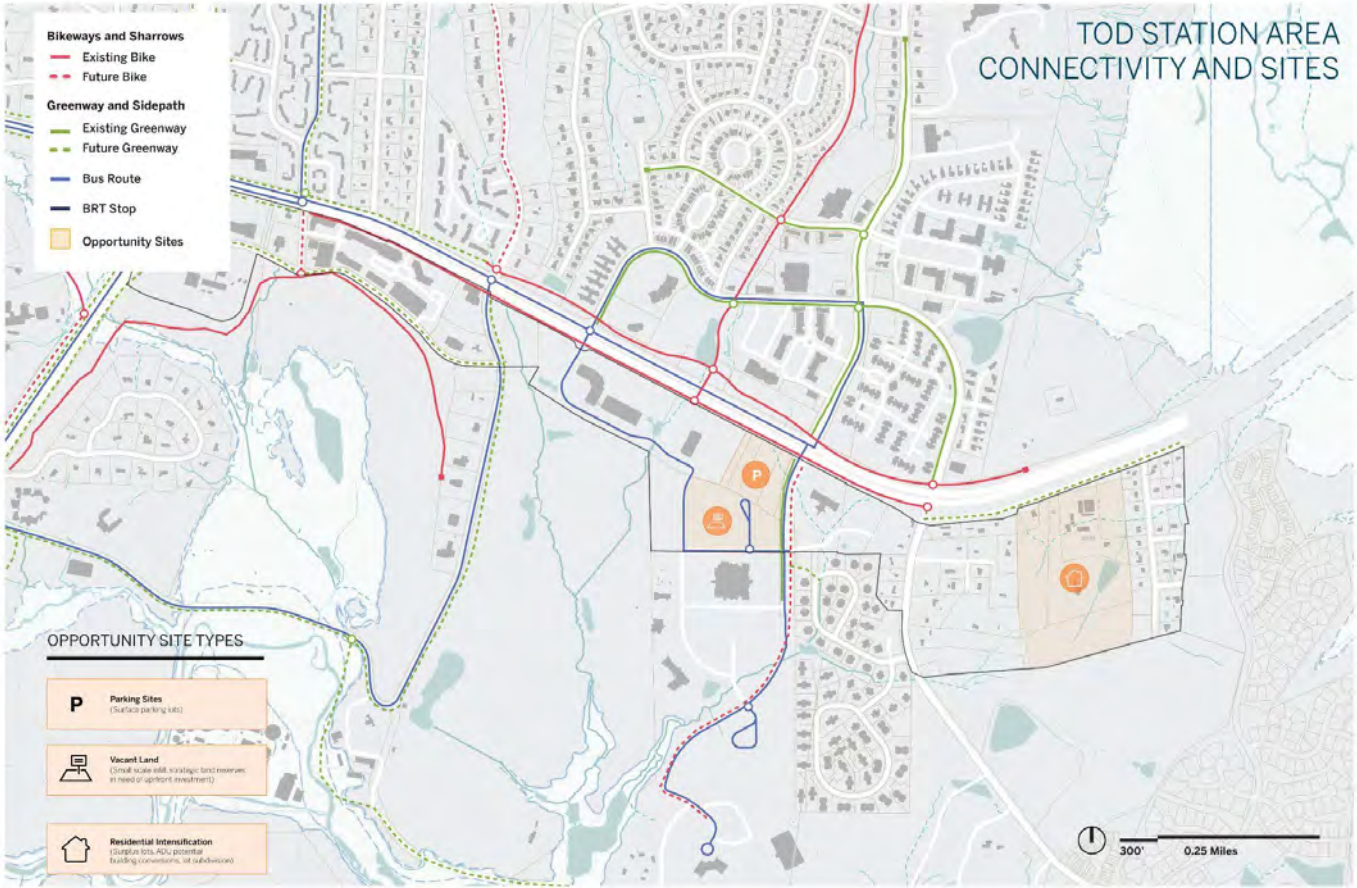
Several office and commercial centers.

Draws patrons from across community and beyond

Potential redevelopment and intensification of existing uses

Draft

NC54: POTENTIAL FUTURE CHANGE LOCATIONS



Opportunity Types

PARKING SITES
Surface parking lots

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

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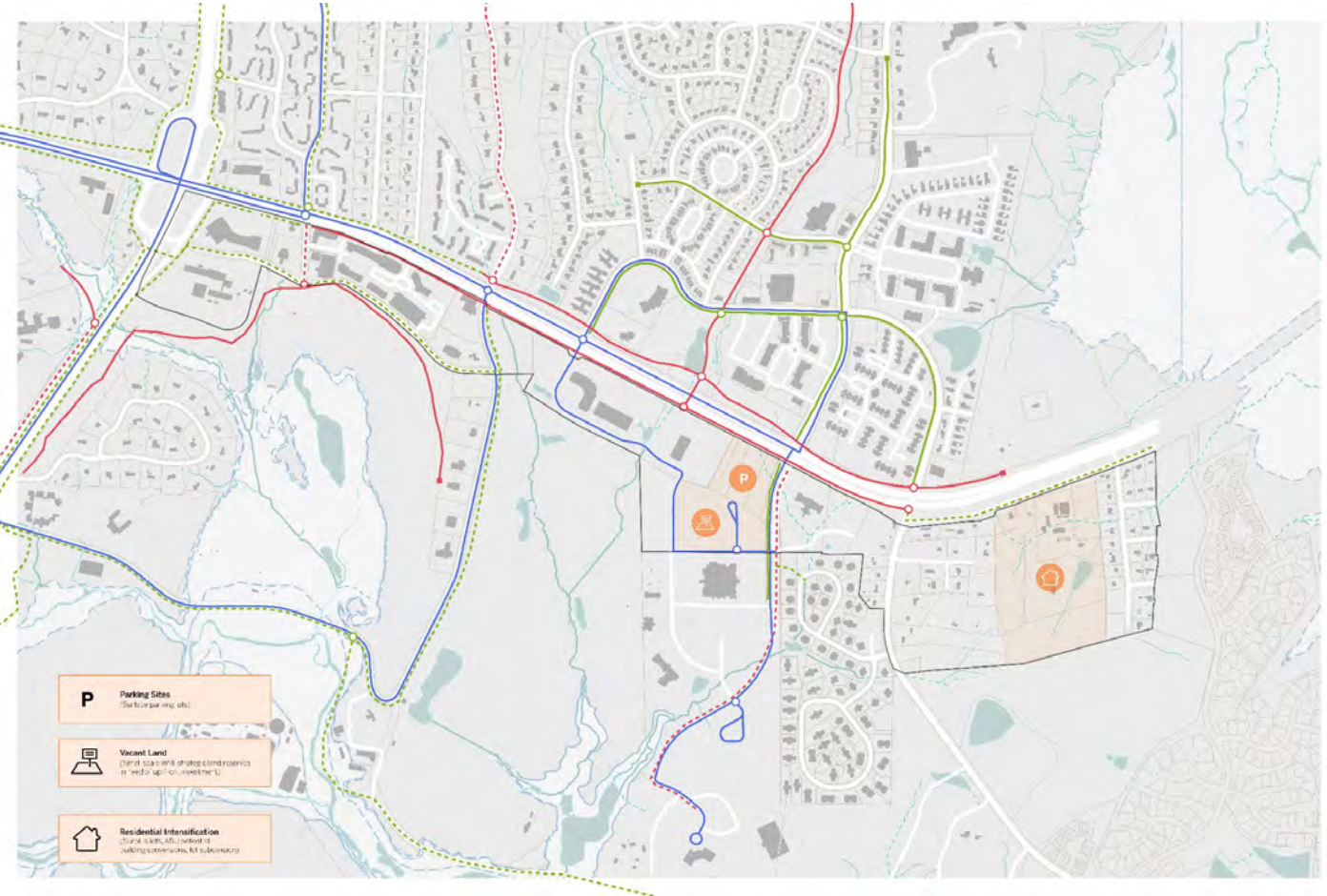
Draft

NC54: POTENTIAL FUTURE CHANGE LOCATIONS



Opportunity Types

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Surface parking lots

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