

TOD Planning & LUMO Visioning SHAPING OUR FUTURE

REVIEW: TOD IMPLEMENTATION TOWN COUNCIL WORK SESSION

January 18, 2023



Draft Meeting Packet



SOM

ORION
PLANNING+DESIGN

OPD

neighboring
concepts

SRF

SBFRIEDMAN

AGENDA



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



DISCUSS: Implementation Recommendations



REVIEW: TOD Framework and Site Concepts; Next Steps



RECAP: *SHAPING OUR FUTURE*

RECAP: *Shaping Our Future* Overview



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

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

SHAPING OUR FUTURE =

**TOD STRATEGY &
IMPLEMENTATION PLAN**

Final Report Feb. 2023



LUMO AUDIT & UPDATE

Final Report Apr. 2023

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

Action: Confirm approach to LUMO Update:
Targeted
Sequential
Comprehensive

RECAP: *Shaping Our Future Objectives & Outcomes*



PHASE 1A

TOD STRATEGY & IMPLEMENTATION PLAN

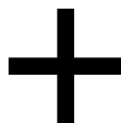
A refined policy direction for strategic growth and development

Guides implementation of TOD

Includes:

- Analysis and findings
- Conceptual scenarios
- Recommendations

Establishes a framework and vision for TOD in the NSBRT Corridor



PHASE 1B, PHASE 2

LUMO AUDIT & UPDATE

A regulatory mechanism

Implements TOD and Complete Community frameworks

Includes:

- Codes
- Regulations
- Standards
- Requirements

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

RECAP: *Shaping Our Future*

Alignment, Consistency and Scale



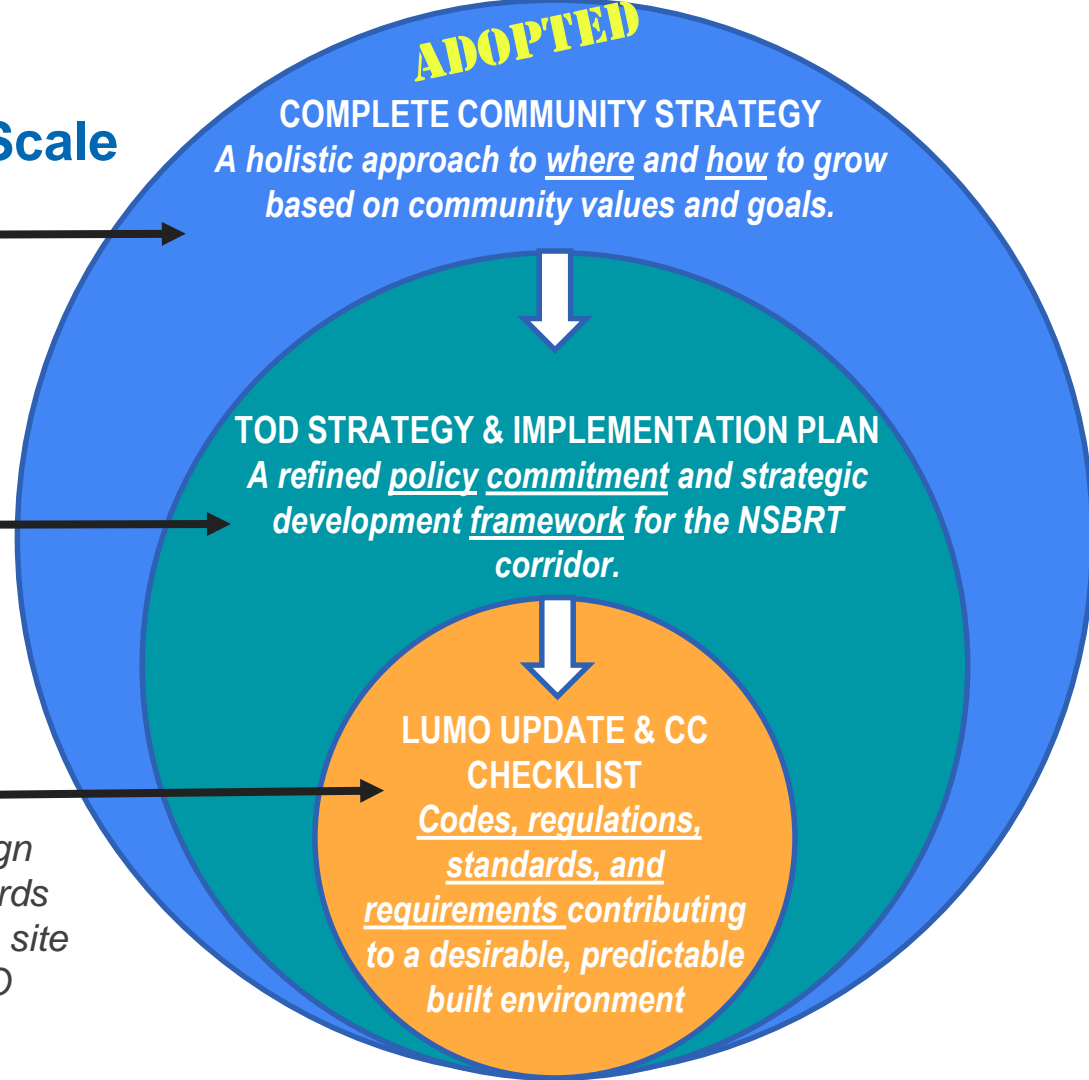
Complete Community is implemented at the Focus Area scale



TOD is implemented at the Station Area scale



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





RECAP: COUNCIL COMMENTS AND FEEDBACK

FOLLOW UP: RESPONDING TO COUNCIL MEMBER FEEDBACK

Definitions & clarifications

Key messaging

Graphic refinements

Topical feedback:

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

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

REGULATE:

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

ADOPT REGULATORY AND POLICY TOOLS:

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



DISCUSS: IMPLEMENTATION RECOMMENDATIONS

REVIEW: IMPLEMENTATION RECOMMENDATIONS

FOUR CATEGORIES

Affordable Housing

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

Economic Development

- Office
- Retail
- Downtown

Equitable Multimodal Accessibility & Mobility

- Sidewalks
- Crossings
- Signage/ wayfinding
- Amenities

TOD Land Use Policies

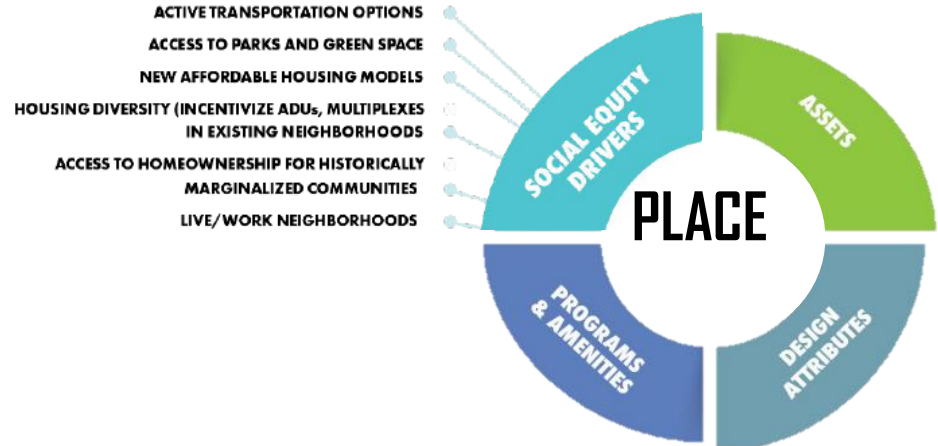
- Modify existing zoning district(s)
- New standalone TOD district(s)
- New TOD Overlay + incentives

REVIEW: IMPLEMENTATION RECOMMENDATIONS

AFFORDABLE HOUSING

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

Existing · Emerging · Proposed
Policies & Programs



EXISTING AFFORDABLE HOUSING POLICIES & PROGRAMS

Policies & programs in place to create & preserve affordable housing

HOUSING DEVELOPMENT

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

HOUSING PROGRAMS

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

FUNDING MECHANISMS

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

PLANNING & REGULATION

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

ZONING POLICIES

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

PARTNERSHIPS & COALITIONS

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

EMERGING POLICIES & PROGRAMS

Chapel Hill piloting or implementing new housing policies & programs

HOUSING DEVELOPMENT

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

HOUSING PROGRAMS

- Starting a revolving loan fund for affordable housing programs

FUNDING MECHANISMS

- Exploring additional funding mechanism for affordable housing preservation and development

ZONING POLICIES

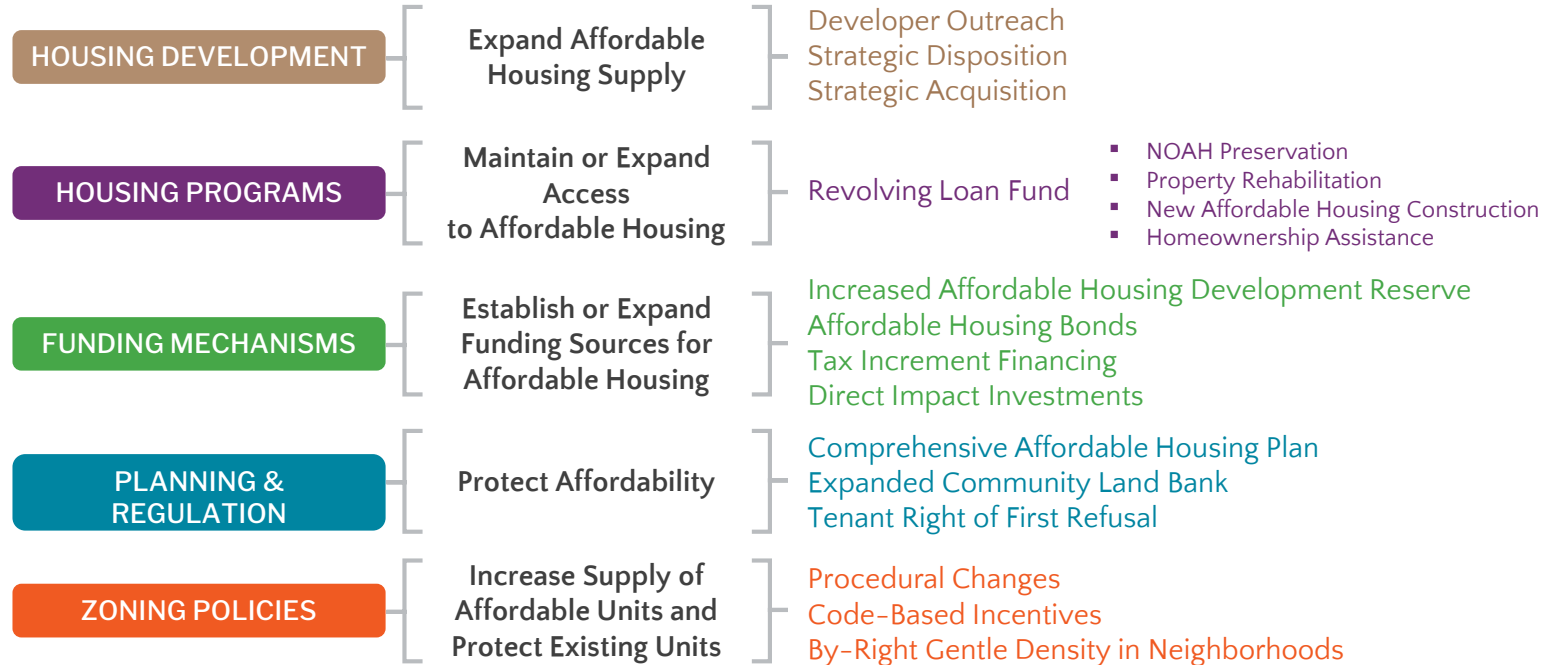
- Consideration of incentives, such as density bonuses
- LUMO update – foster creation and preservation of affordable housing units
- LUMO text amendments to expand housing choices in neighborhoods

PARTNERSHIPS & COALITIONS

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

PROPOSED AFFORDABLE HOUSING TOOLKIT

Protect, expand, diversify and promote affordability





QUESTION

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

REVIEW: IMPLEMENTATION RECOMMENDATIONS



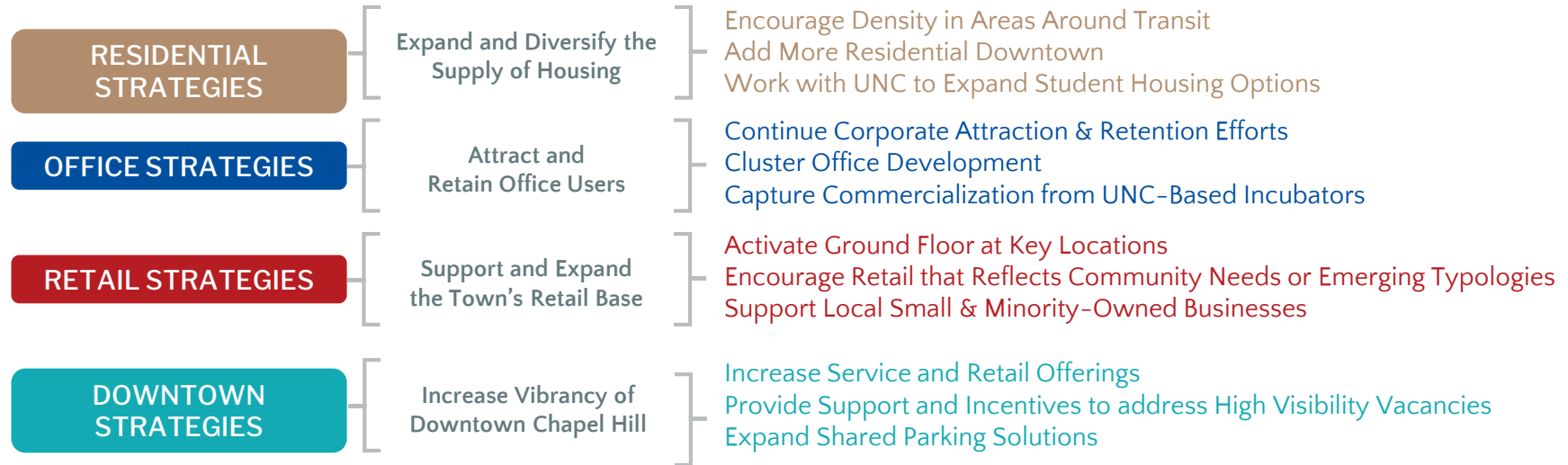
DAYCARES, SCHOOLS AND COMMUNITY CENTERS
FOOD / MARKETS
CULTURAL & SOCIAL EVENTS LINKED TO INDUSTRIES
EDUCATION & TRAINING
RESEARCH & DEVELOPMENT
SERVICES TO SUPPORT INNOVATION & ENTREPRENEURIALISM
LOCAL INDEPENDENT RETAILERS
SOCIAL INNOVATION/NON-PROFIT INCUBATORS
POLICIES TO DRIVE LIVE/WORK SPACES IN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

ECONOMIC DEVELOPMENT

- Office
- Retail
- Downtown

ECONOMIC DEVELOPMENT STRATEGIES

Strategies to facilitate equitable growth and development





QUESTION

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

REVIEW: IMPLEMENTATION RECOMMENDATIONS



EQUITABLE MULTIMODAL ACCESSIBILITY & MOBILITY

- Sidewalks
- Crossings
- Signage/ wayfinding
- Amenities

EQUITABLE MULTIMODAL ACCESSIBILITY & MOBILITY STRATEGIES

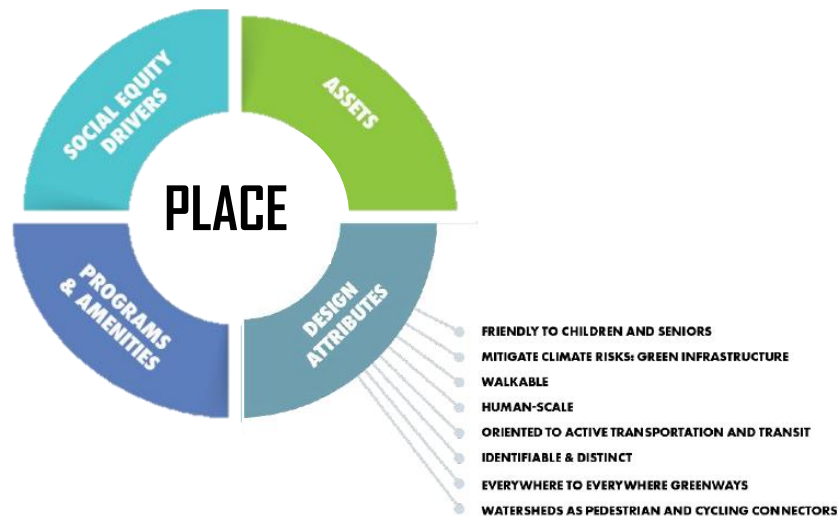
- Sidewalk gaps in BRT corridor: 43 (20,650 linear feet)
- Sidepath gaps in BRT corridor: 8 (4,500 linear feet)
- Sidewalk gaps in focus areas: 5 (2,740 linear feet)
- Sidepath gaps in focus areas: 16 (46,220 linear feet)
- Mid-block crossings at potential development sites and where traffic calming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



EQUITY METRICS

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

REVIEW: IMPLEMENTATION RECOMMENDATIONS



TOD Land Use Policies

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



QUESTION

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

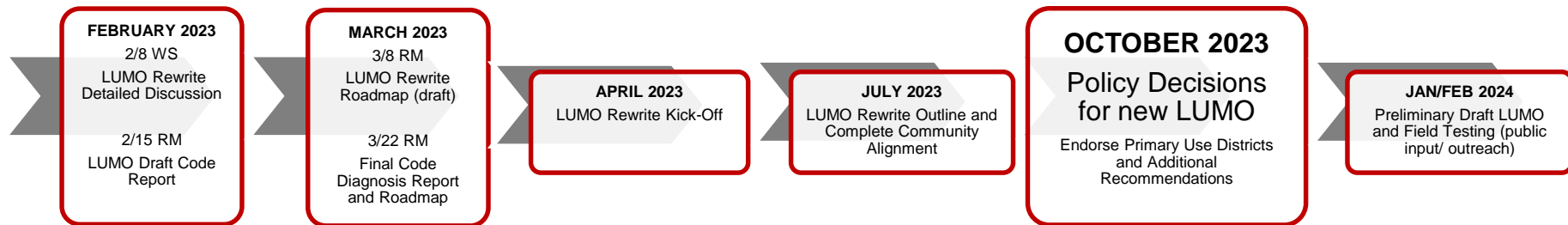
LUMO DIAGNOSIS

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

LUMO UPDATE: RECOMMENDED APPROACH – COMPREHENSIVE REWRITE

	Method	Pros	Cons	Examples
Targeted	Focus on priority content issues.	Focus and speed	Overall clarity / internal conflicts not resolved	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 <i>plus</i> targeted short-term revisions	Holistic review of land development standards, incentives, processes - basis for unified development ordinance (LUMO)	Longer process (two years), public engagement, support and training for staff, stakeholders, and elected officials	Raleigh, North Carolina Missoula, Montana

LUMO UPDATE: RECOMMENDED APPROACH – COMPREHENSIVE REWRITE





QUESTION

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



REVIEW: TOD FRAMEWORK & SITE CONCEPTS

Selected Examples

RECAP: EVOLUTION OF TOD STATION AREA CONCEPTS

STEP 1: SITE LEVEL ASSESSMENTS

Purpose: high level suitability and character analysis

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



STEP 2: DRAFT CONCEPTS

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

Informed by:

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



RECAP: EVOLUTION OF STATION AREA CONCEPTS

STEP 3: REFINED CONCEPTS

Purpose: Integrate comments and feedback; add additional detail

- Align with Complete Community
- Address additional feedback



STEP 4: FINAL CONCEPTS

Purpose: Respond to final round of comments and feedback

- Included in TOD Strategy & Implementation Plan



NORTH Martin Luther King Jr. Blvd. FOCUS AREA

Potential Uses / Typologies

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

Focus Area

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

Transportation

- Bus Route
- BRT Stop
- Station Areas

Potential Site Connections

- Site BRT Path
- Potential Connectivity Enhancements

Bikeways/Sharrows

- Existing Bike/Sharrows
- Future Bike/Sharrows

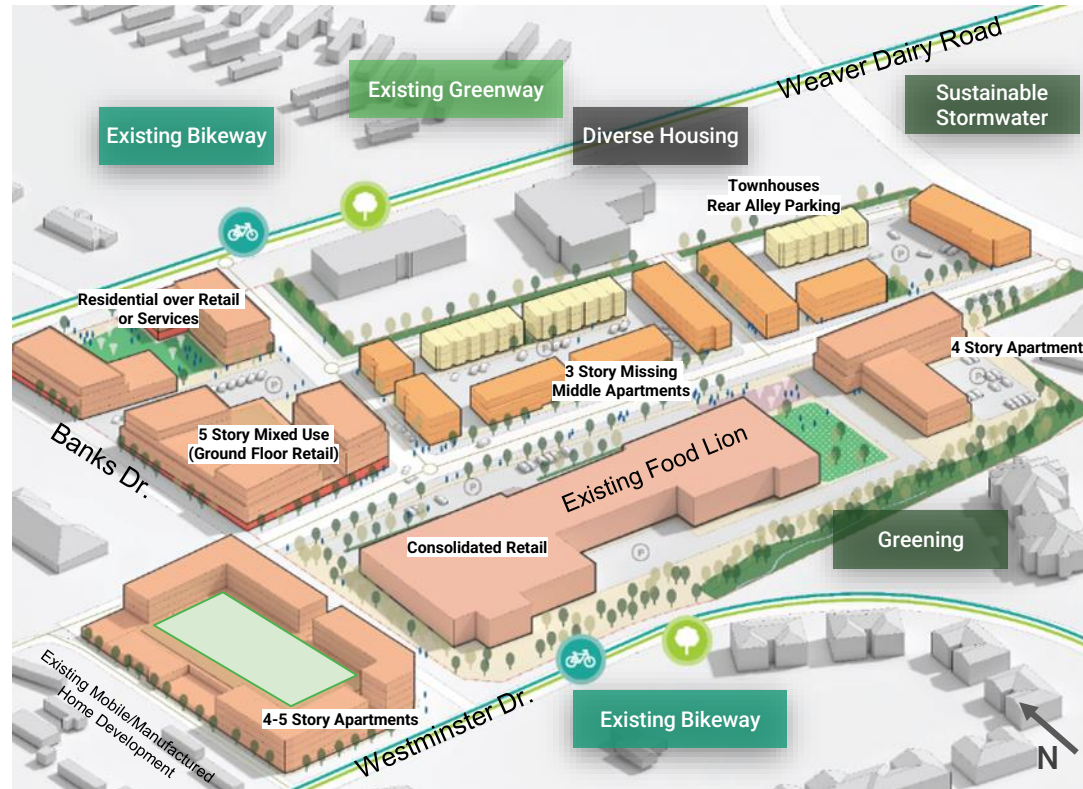
Greenways/Sidepaths

- Existing Greenways/Sidepaths
- Future Greenways/Sidepaths

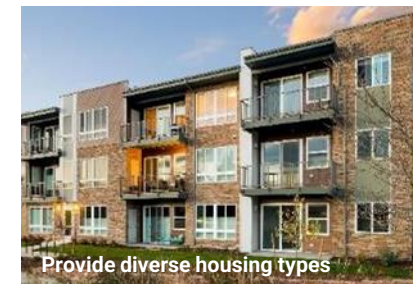


Potential Site: **Timberlyne Mall** A Sustainable Mixed-Use Community

Weaver Dairy TOD

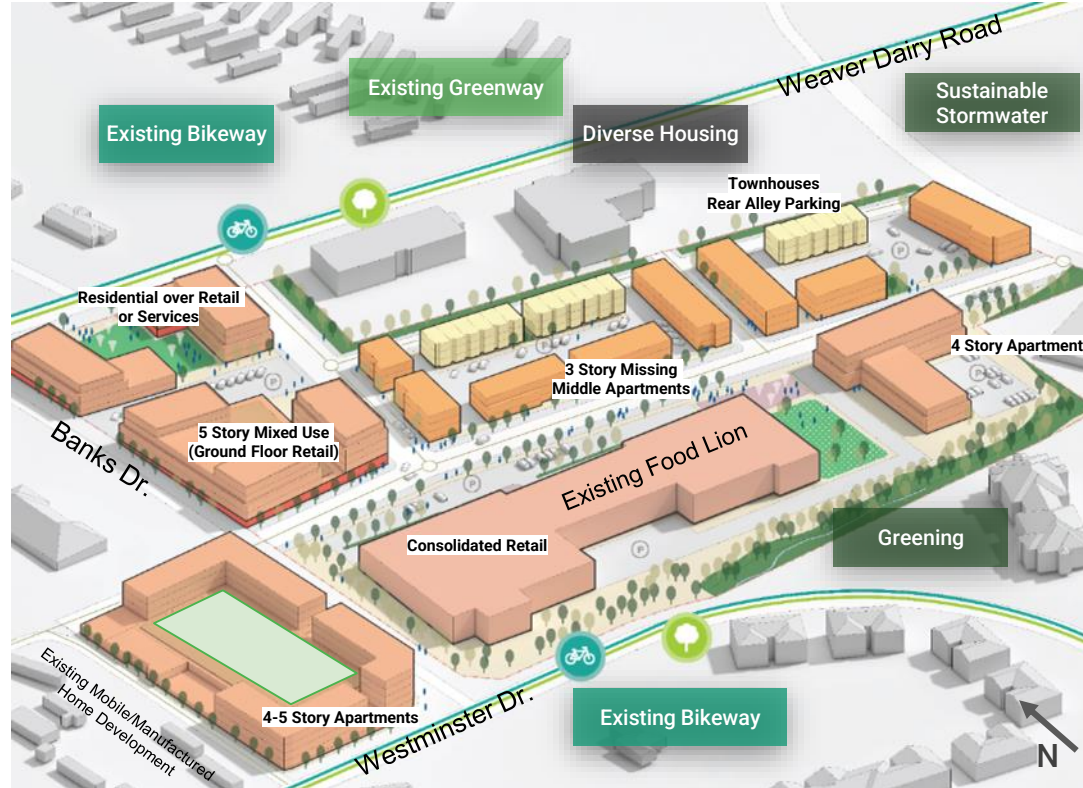


Potential change by 2040: illustrating principles, testing capacity



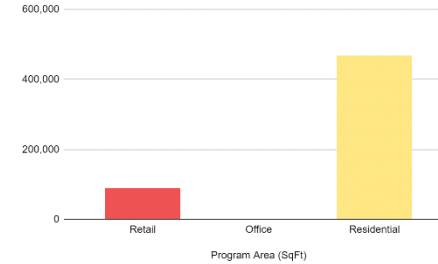
Potential Site: **Timberlyne Mall** A Sustainable Mixed-Use Community

Weaver Dairy TOD



Potential change by 2040: illustrating principles, testing capacity

Use Mix (Approx)



Residential Units: 340-360

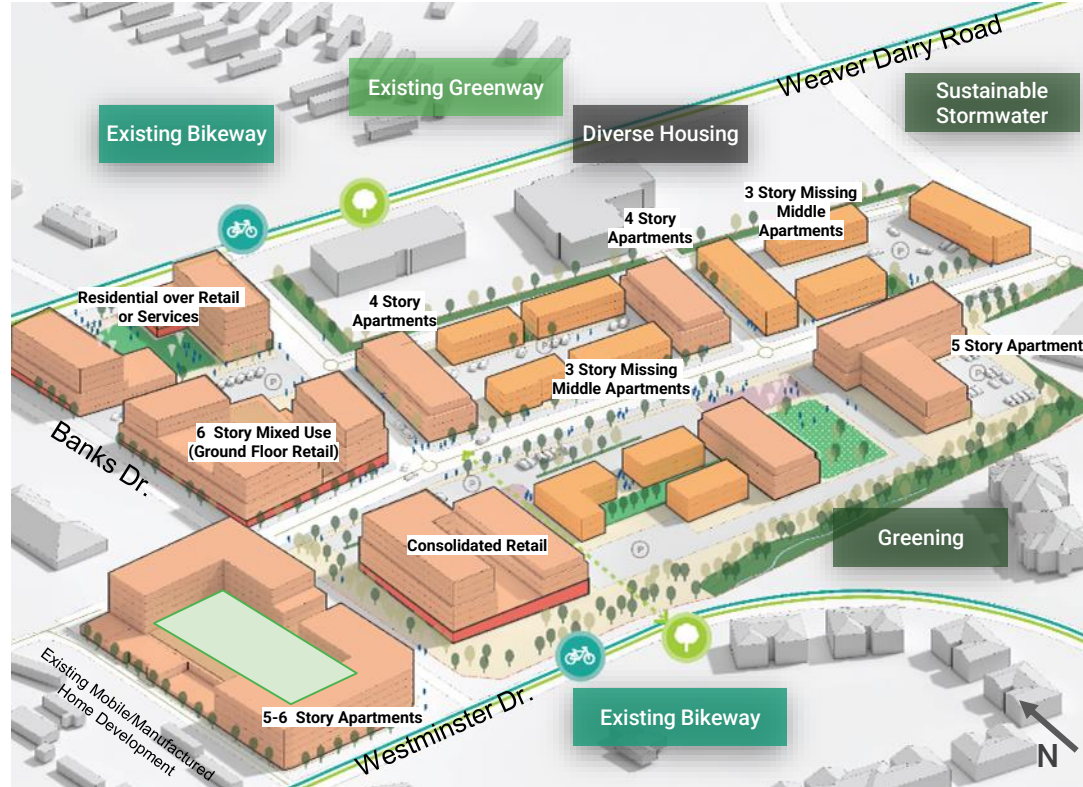
Retail / Mixed Use GFA: 50-55,000 sq ft

DU/Acre: 20-30 Approx



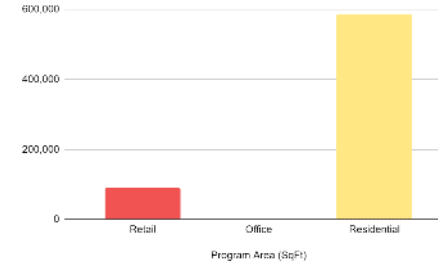
Potential Site: **Timberlyne Mall** A Sustainable Mixed-Use Community

Weaver Dairy TOD



Potential change by 2040: illustrating principles, testing capacity

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



Residential Units: 470-490

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

DU/Acre: 30-40 Approx

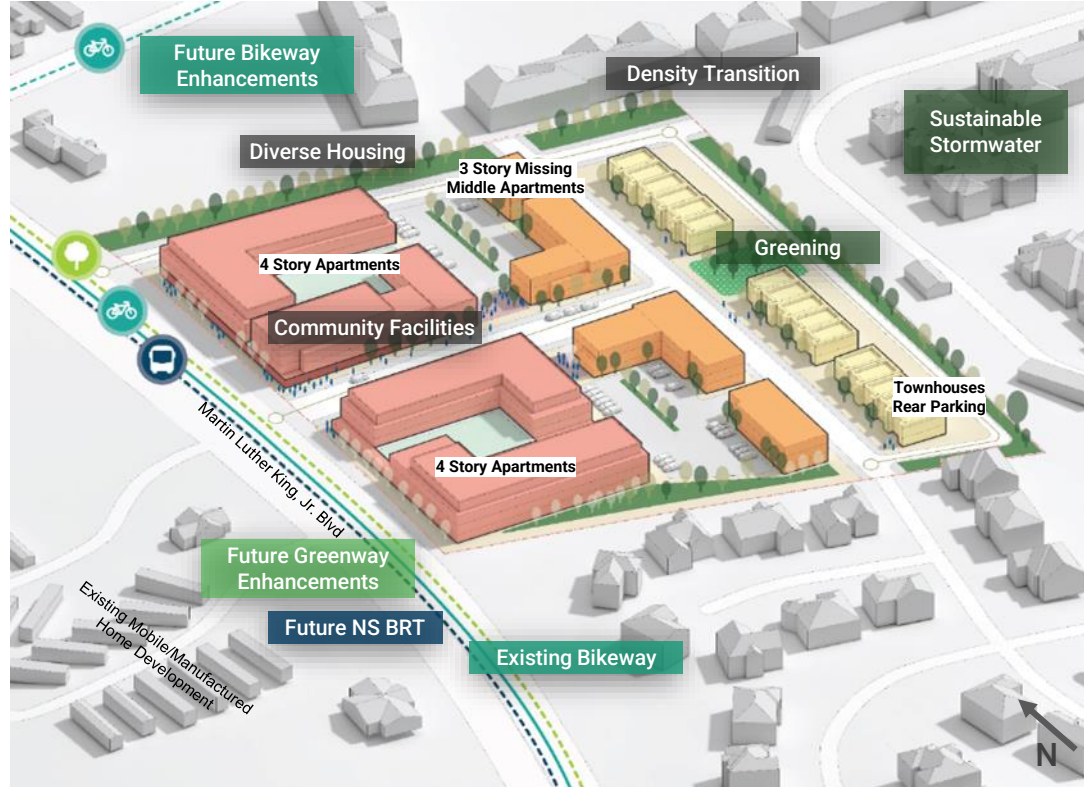


Potential Site: Martin Luther King Jr. Blvd. and Westminster Drive

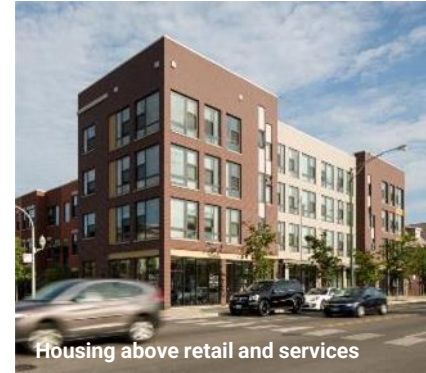
Draft: Work-in-Progress

Weaver Dairy/New Stateside TOD

A Transit Oriented Hub



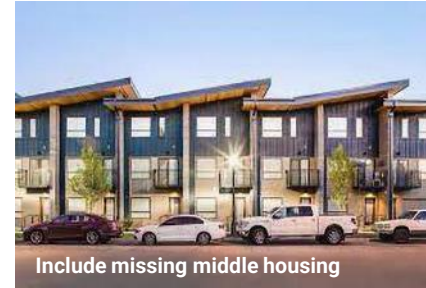
Potential change by 2040: illustrating principles, testing capacity



Housing above retail and services



Multi-modal streets



Include missing middle housing

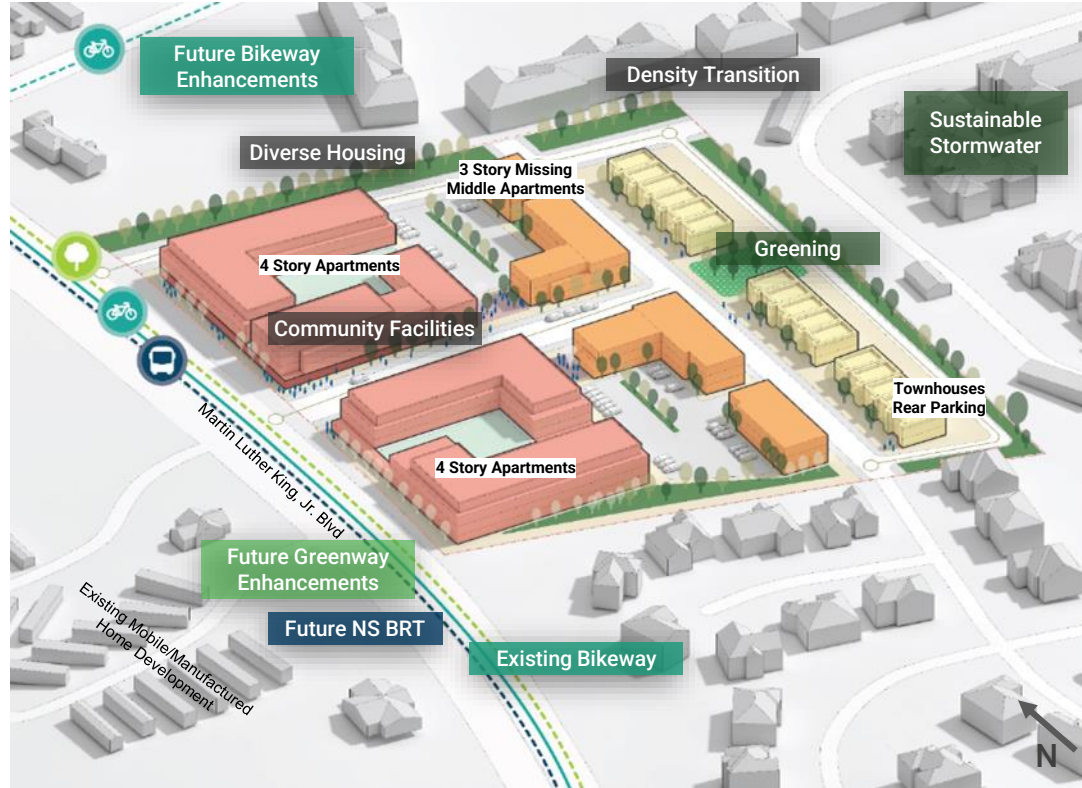


Walkable streets

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

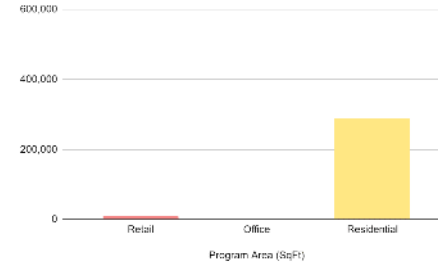
Draft: Work-in-Progress

Weaver Dairy/New Stateside TOD



Potential change by 2040: illustrating principles, testing capacity

Use Mix (Approx)



Residential Units: 200-220

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

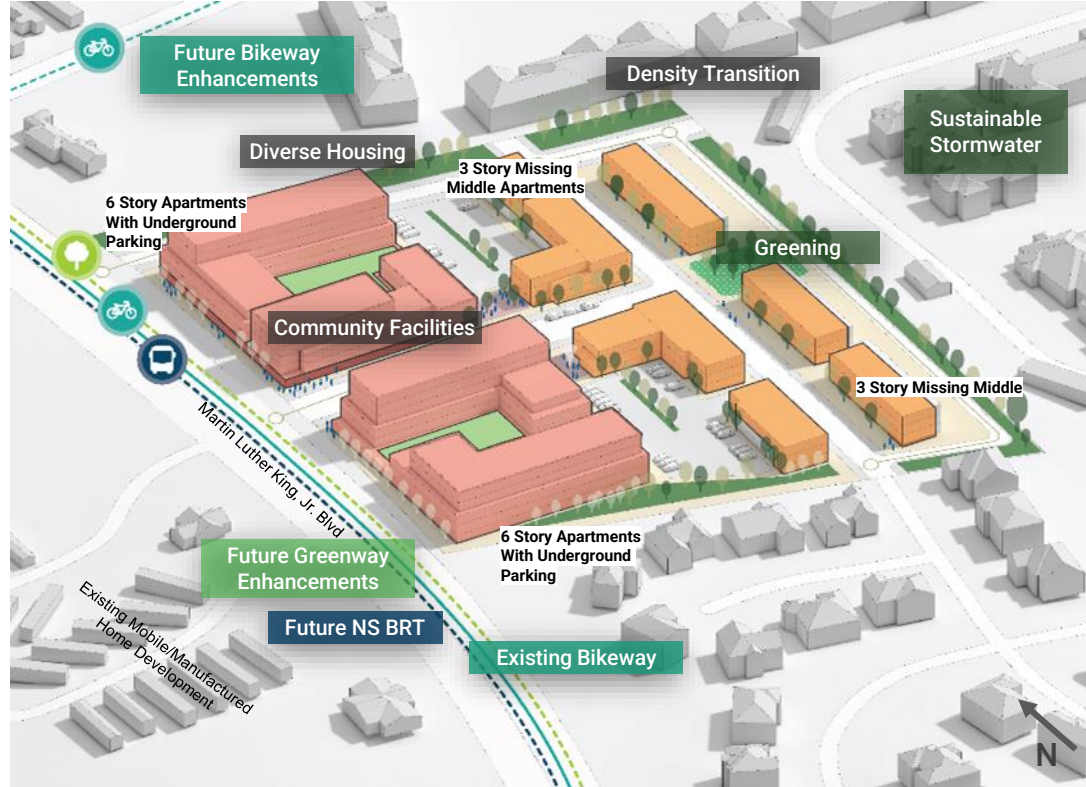
DU/Acre: 20-25 Approx



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

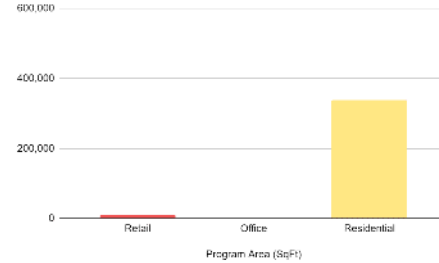
Draft: Work-in-Progress

Weaver Dairy/New Stateside TOD



Potential change by 2040: illustrating principles, testing capacity

Use Mix (Approx): Enhanced Outputs



Residential Units: 260-280

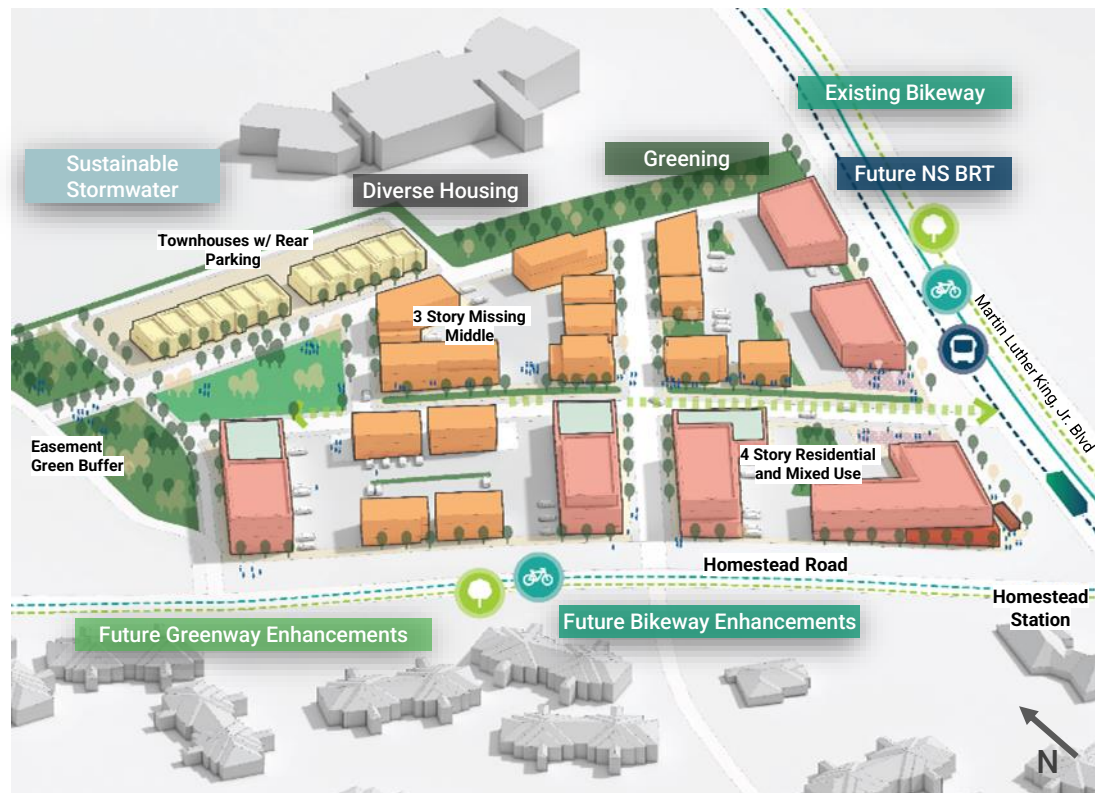
Retail / Mixed Use GFA: 8-10,000 sq ft

DU/Acre: 25-30 Approx

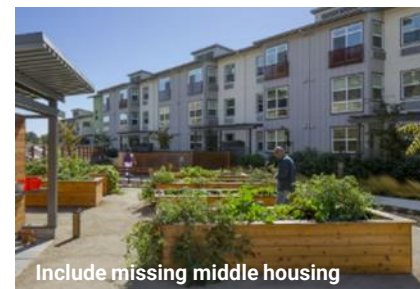


Potential Site: Homestead Road A TOD Neighborhood

Homestead TOD



Potential change by 2040: illustrating principles, testing capacity



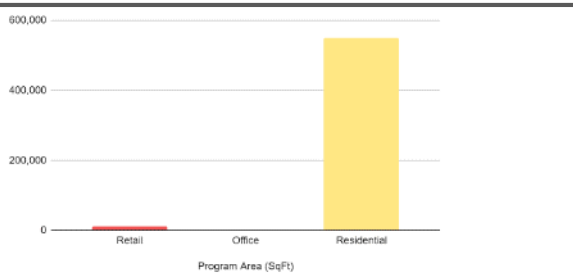
Potential Site: Homestead Road A TOD Neighborhood

Homestead TOD



Potential change by 2040: illustrating principles, testing capacity

Use Mix (Approx)



Residential Units: 230-250

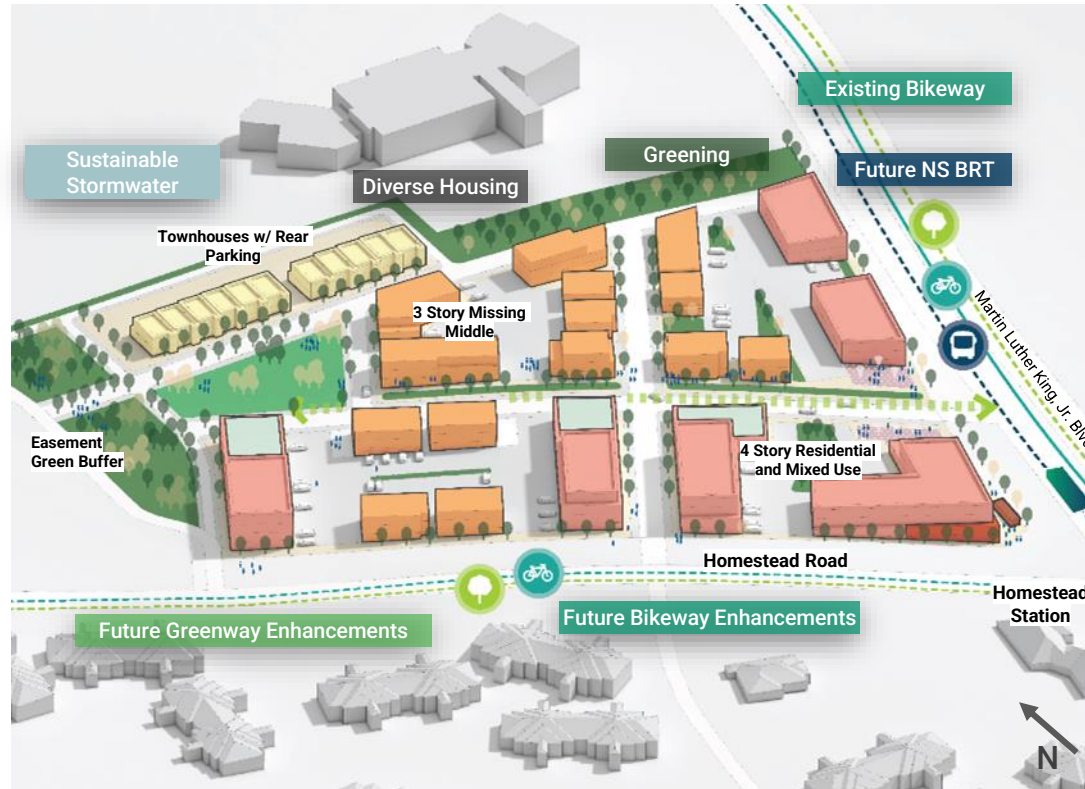
Retail GFA: 8-10,000 sq ft

DU/Acre: 20-25 Approx



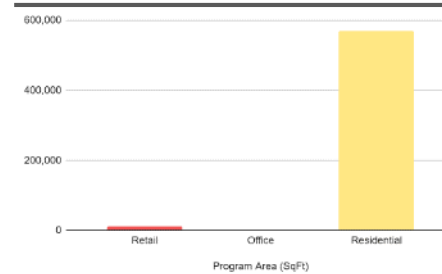
Potential Site: Homestead Road A TOD Neighborhood

Homestead TOD



Potential change by 2040: illustrating principles, testing capacity

Use Mix (Approx): Enhanced Outputs



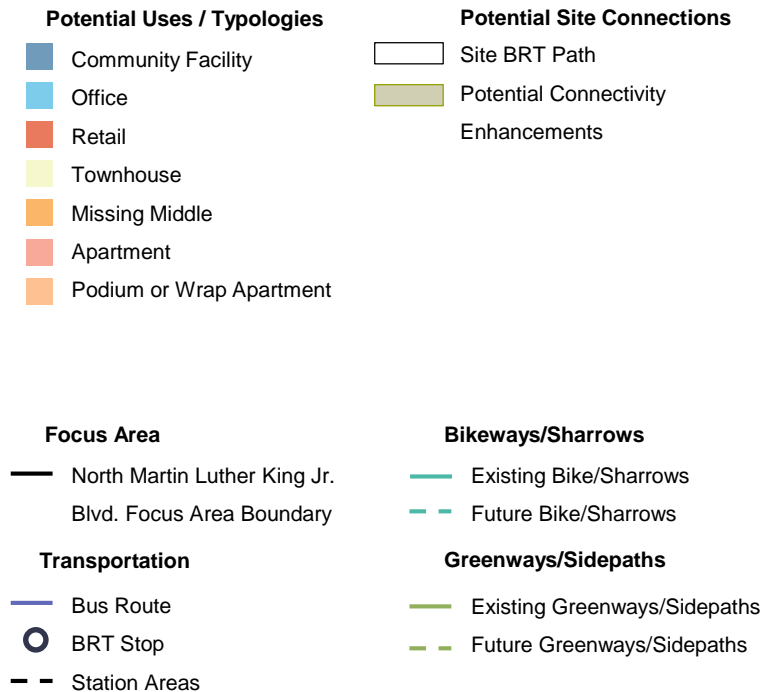
Residential Units: 250-270

Retail GFA: 8-10,000 sq ft

DU/Acre: 25-30 Approx



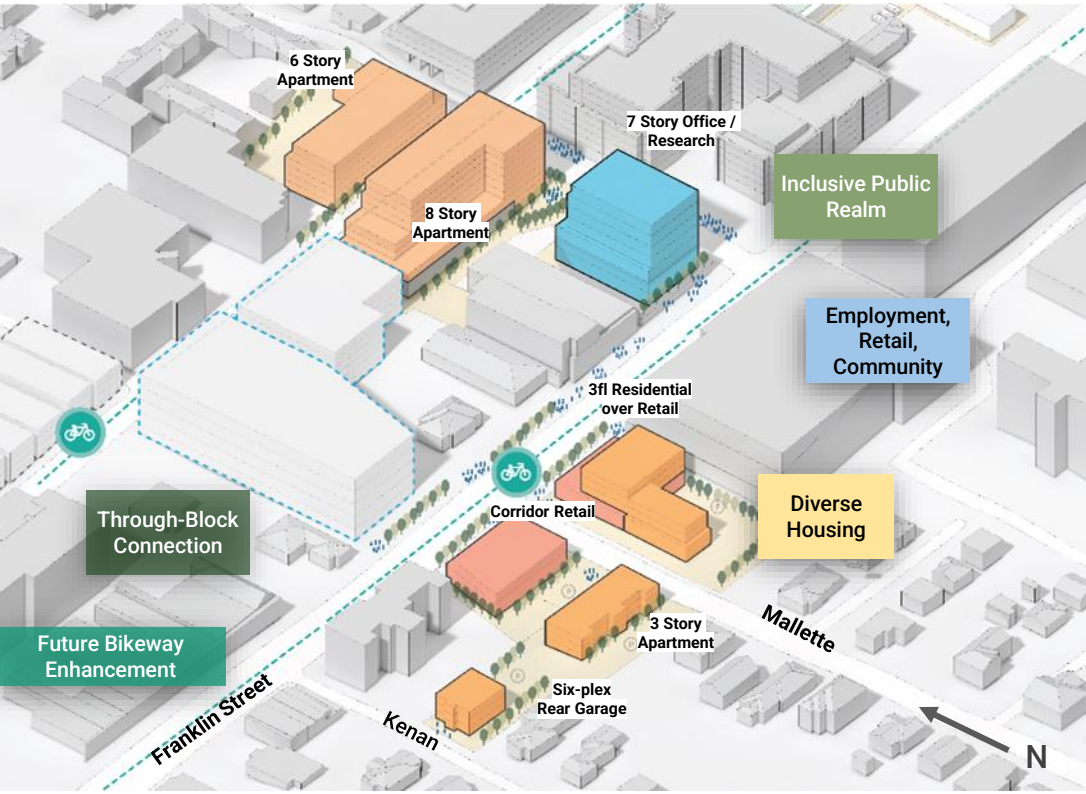
DOWNTOWN FOCUS AREA





Potential Sites: West of Church St

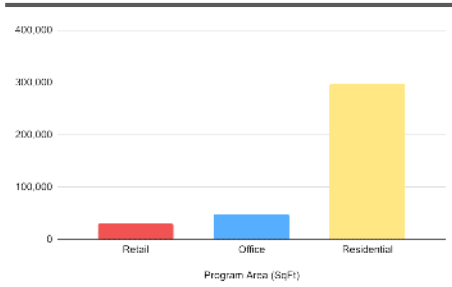
Downtown TOD



Potential change by 2040: illustrating principles, testing capacity

A Dynamic Downtown District

Use Mix (Approx)

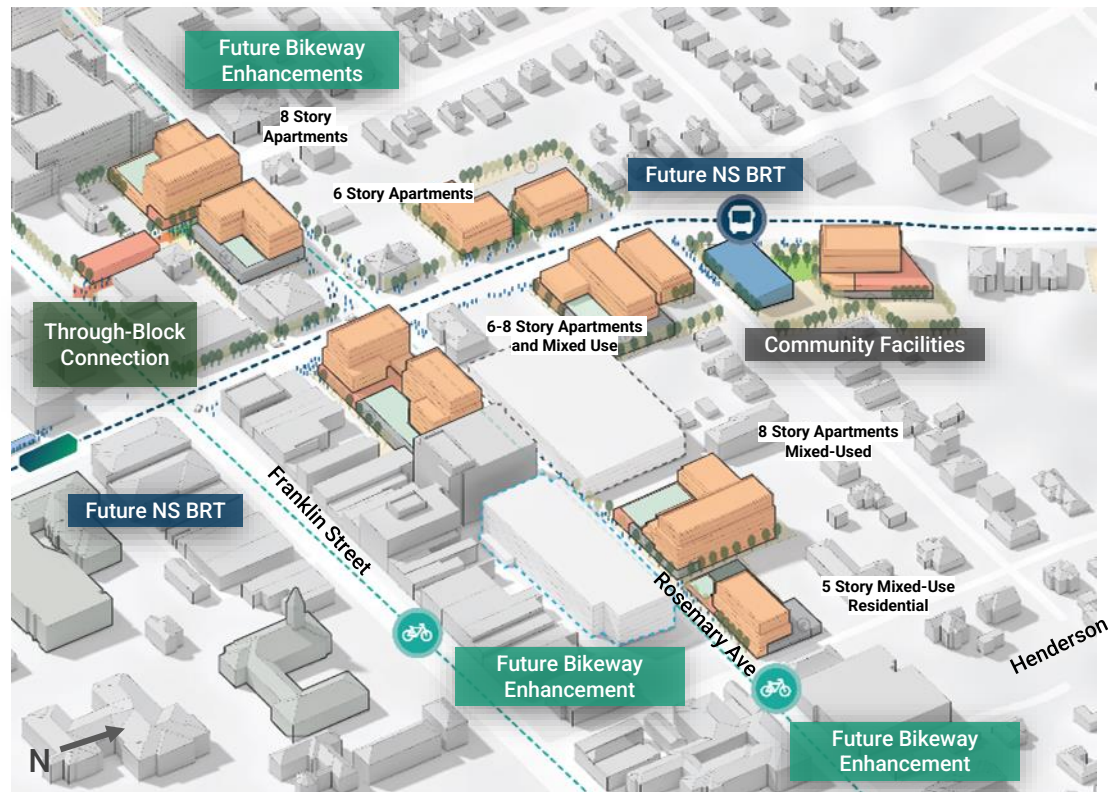


Residential Units: 200-225
Retail GFA: 50-65,000 sq ft
Office GFA: 45-50,000 sq ft



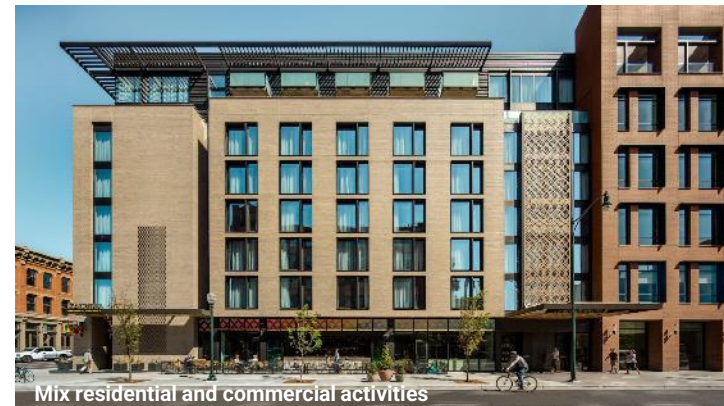
Potential Sites: East of Church St

Downtown TOD



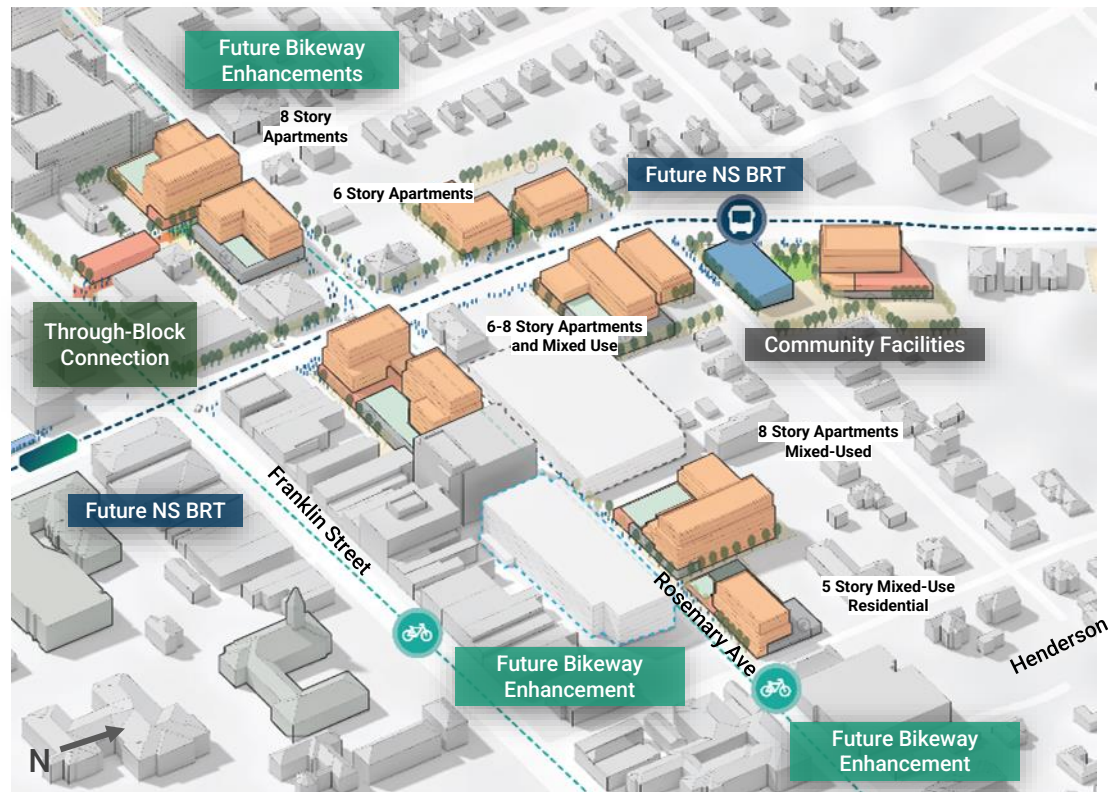
Potential change by 2040: illustrating principles, testing capacity

Extend Downtown Living



Potential Sites: East of Church St

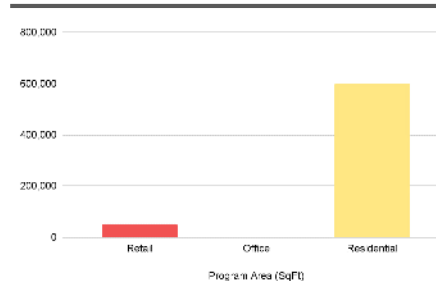
Downtown TOD



Potential change by 2040: illustrating principles, testing capacity

Extend Downtown Living

Use Mix (Approx)



Residential Units: 450-500

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





QUESTION

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

DISCUSSION

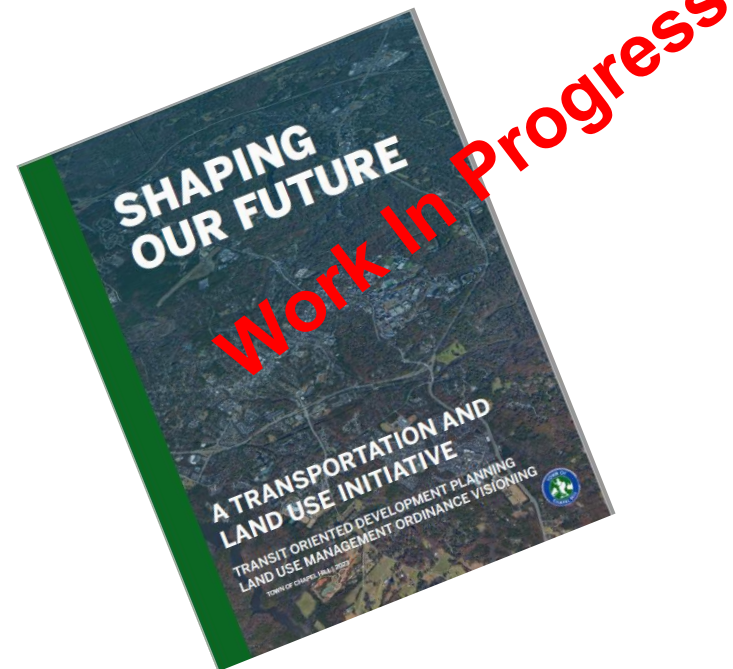
- Questions/clarification about connections between TOD Plan and LUMO Update and/or objectives of *Shaping Our Future* project phases
- Questions, concerns, clarifications about disposition of comments and feedback
- Questions, concerns, or clarifications about implementation recommendations

NEXT STEPS

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

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APPENDIX

Implementation Management

Implementation Management: Affordable Housing

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

Implementation Management: Affordable Housing

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

Implementation Management: Affordable Housing

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

Implementation Management: Economic Development

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

Implementation Management: Accessibility

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

Implementation Management: LUMO

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

GROWTH FORECASTS

CHAPEL HILL CAPTURE OF HOUSING DEMAND

Chapel Hill could capture between 6,410 and 8,910 new housing units by 2040

HISTORIC TREND CAPTURE

6,410 total units by 2040
320 units annually

910
Single Family, Detached

1,710
Multifamily, 2-19 Units

310
Single Family, Attached

3,480
Multifamily, 20+ Units

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

DEMAND DRIVEN CAPTURE

8,910 total units by 2040
446 units annually

1,140
Single Family, Detached

2,250
Multifamily, 2-19 Units

530
Single Family, Attached

4,990
Multifamily, 20+ Units

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

CHAPEL HILL PIPELINE RECONCILIATION

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

HISTORIC TREND CAPTURE

	SF, Detached	SF, Attached	MF, 2-19	MF, 20+	Total
Net Demand	910	310	1,710	3,480	6,410
SBF Pipeline Projection	88	192	133	2,712	3,125
Demand Net of Pipeline	822	118	1,577	768	3,285

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

DEMAND DRIVEN CAPTURE

	SF, Detached	SF, Attached	MF, 2-19	MF, 20+	Total
Net Demand	1,140	530	2,250	4,990	8,910
SBF Pipeline Projection	88	192	133	2,712	3,125
Demand Net of Pipeline	1,052	338	2,117	2,278	5,785

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

HOUSING DEMAND 2040 – NET OF PIPELINE

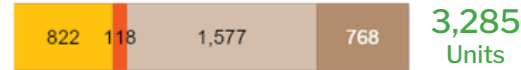
- **Demand Driven: higher share of regional housing**
 - Diverse housing for local residents and workforce
 - Mitigate upward price pressure
 - Transit supportive densities
 - Densities supporting viability of services and public realm
 - Meeting the Town's Guiding Principles (FLUM)
 - Reflecting Complete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

REMAINING UNITS TO MEET HOUSING DEMAND

DEMAND DRIVEN CAPTURE RATE



HISTORIC TREND CAPTURE RATE

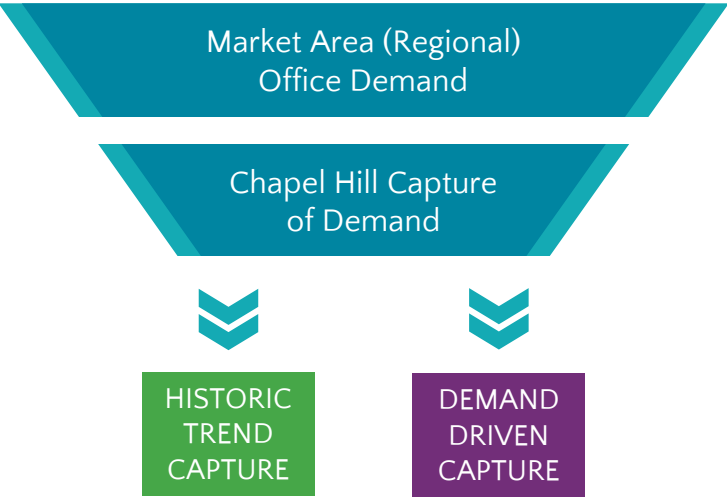


0 1,000 2,000 3,000 4,000 5,000 6,000

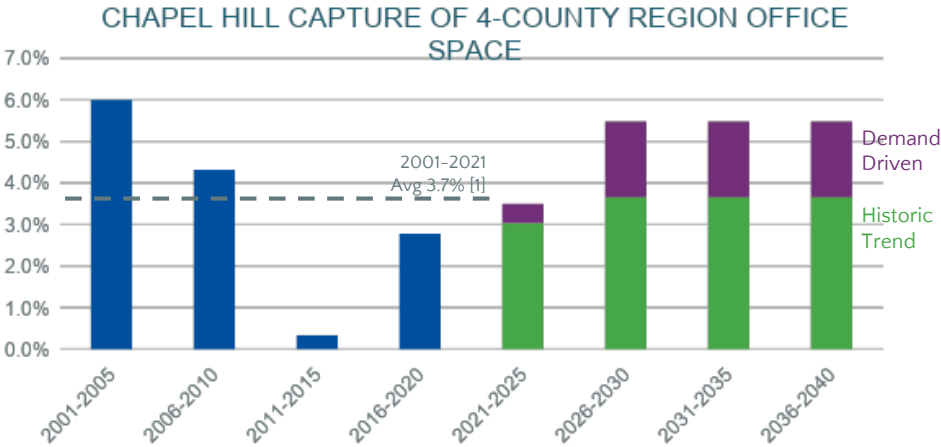
- Single Family, Detached
- Single Family, Attached
- Multifamily, 2-19 Units
- Multifamily, 20+ Units

CHAPEL HILL CAPTURE OF OFFICE DEMAND

SB Friedman evaluated office demand under historic & enhanced capture rates



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



CHAPEL HILL CAPTURE OF OFFICE DEMAND

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

HISTORIC TREND CAPTURE

700–800K SF

Larger-Scale Corporate
Office Space by 2040

70–75K SF

Professional
Office Space by 2040

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

DEMAND DRIVEN CAPTURE

1.0–1.1M SF

Larger-Scale Corporate
Office Space by 2040

80–85K SF

Professional
Office Space by 2040

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

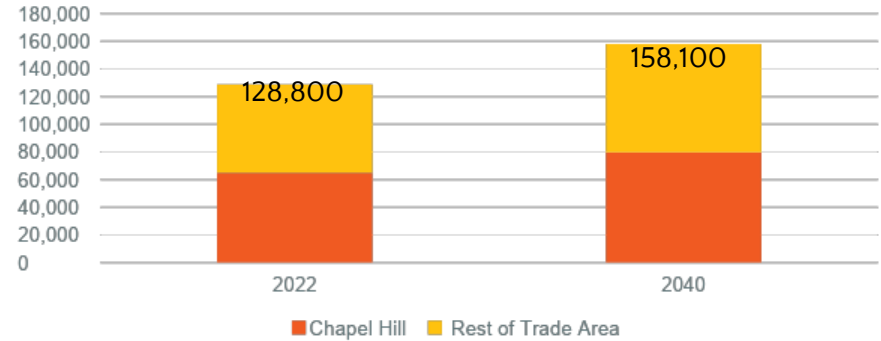
POPULATION GROWTH & RETAIL SPENDING

Primary Trade Area extends west from Chapel Hill

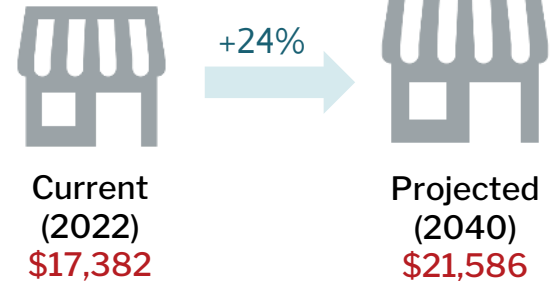
- Chapel Hill trade area: 128,800 residents
- Approx half of live in Chapel Hill itself
- “Demand Driven” scenario: trade area’s population will increase to 158,100 by 2040.
- Trade area projected to become more affluent
- Trade area per capita retail spending is projected to increase by 24% by 2040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

Source: Business Analyst, ESRI, SB Friedman

TRADE AREA PROJECTED POPULATION



TRADE AREA PER CAPITA RETAIL SPENDING

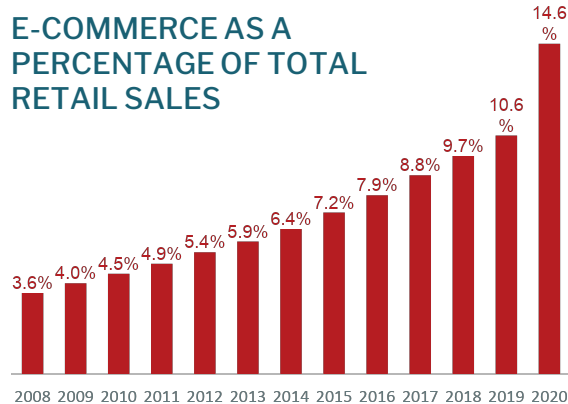


RETAIL TRENDS

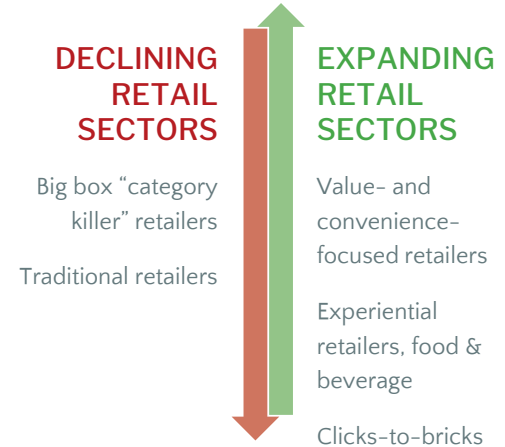
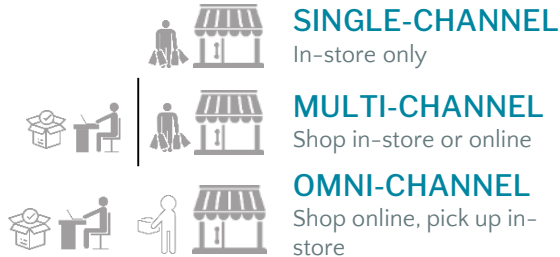
Recent trends are impacting bricks & mortar retail nationally

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

E-COMMERCE AS A PERCENTAGE OF TOTAL RETAIL SALES



Source: SB Friedman, US Census Bureau



DEMAND PROJECTIONS

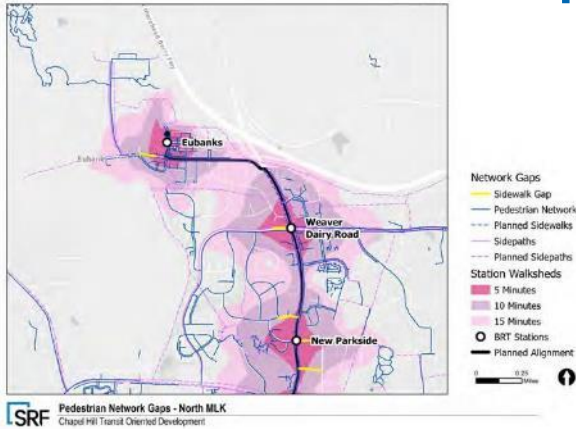
Chapel Hill could support an additional ±660K SF of retail space by 2040

Retail Category	Trade Area Demand Change 2022-2040	Trade Area Demand Potential (2040)	Typical Sales PSF (2040)	Chapel Hill Capture of Demand	Chapel Hill Supportable SF
Furniture and home furnishings stores		\$96M	\$320	25%	75,000
Electronics and appliance stores		\$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
<i>Non-Retail SF % (Services, Medical & Professional Office, etc.)</i>					<i>15.0%</i>
Total Occupied SF					614,000 SF
Vacancy Rate					7.0%
Total Supportable SF					660,000 SF

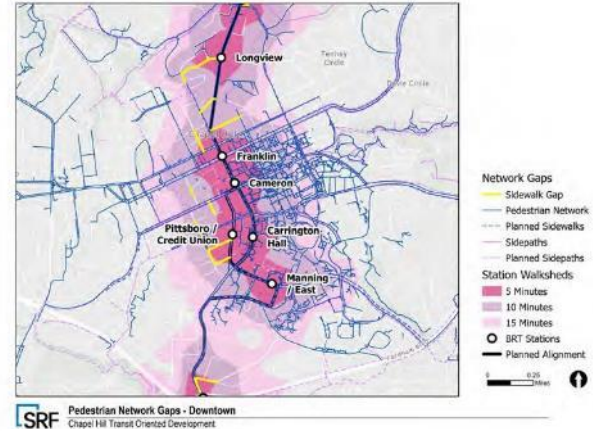
ACCESSIBILITY AUDIT

Supplemental Information

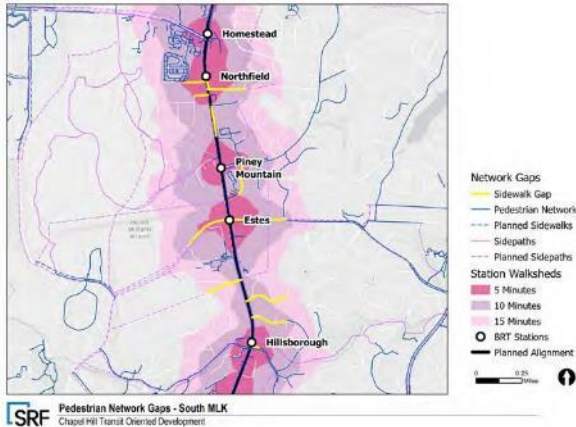
N-S BRT Pedestrian Network Gaps



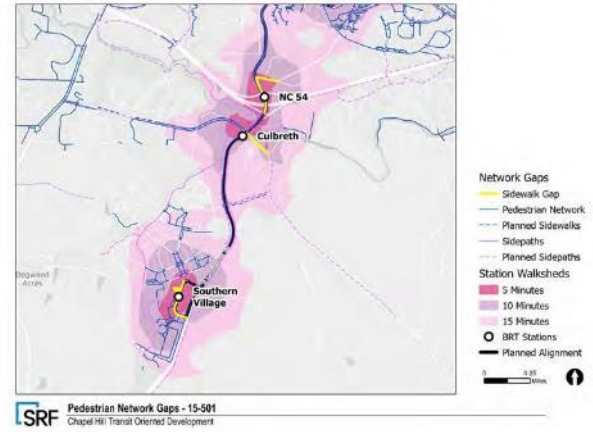
Pedestrian Network Gaps- MLK North



Pedestrian Network Gaps- Downtown

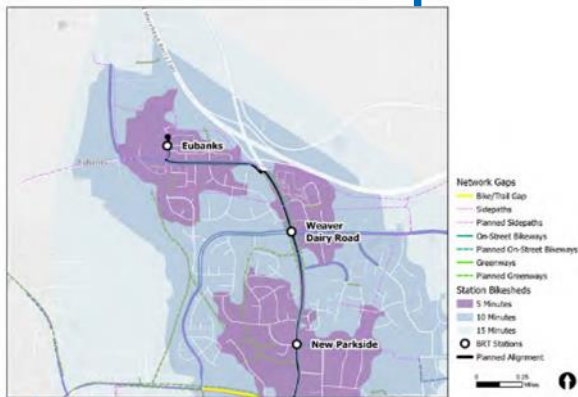


Pedestrian Network Gaps- MLK North and South



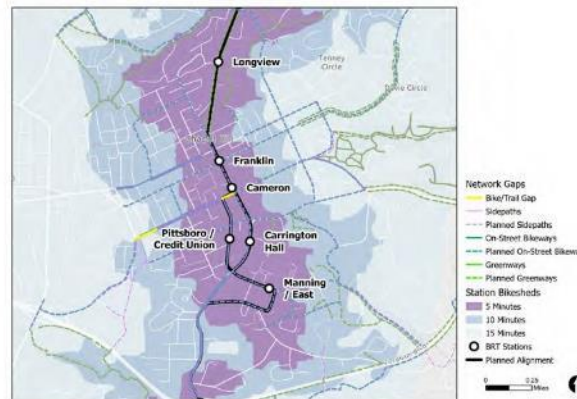
Pedestrian Network Gaps- South Columbia

N-S BRT Bike Network Gaps



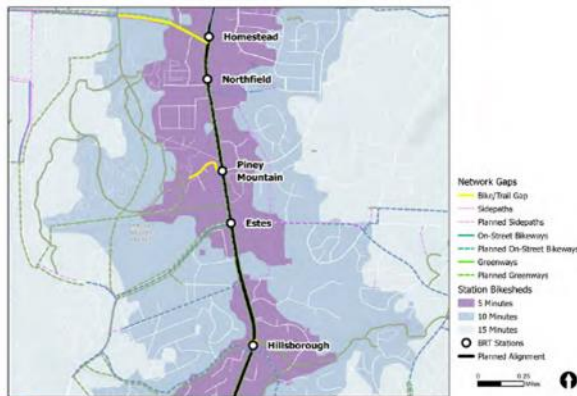
SRF Bike Network Gaps - North MLK
Chapel Hill Transit Oriented Development

Bike Network Gaps- MLK North



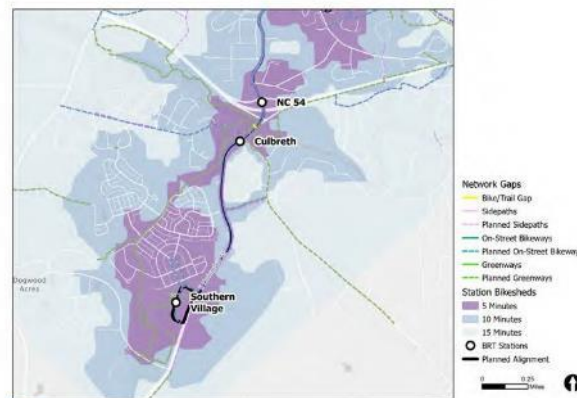
SRF Bike Network Gaps - Downtown
Chapel Hill Transit Oriented Development

Bike Network Gaps- Downtown



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

Bike Network Gaps- MLK North and South

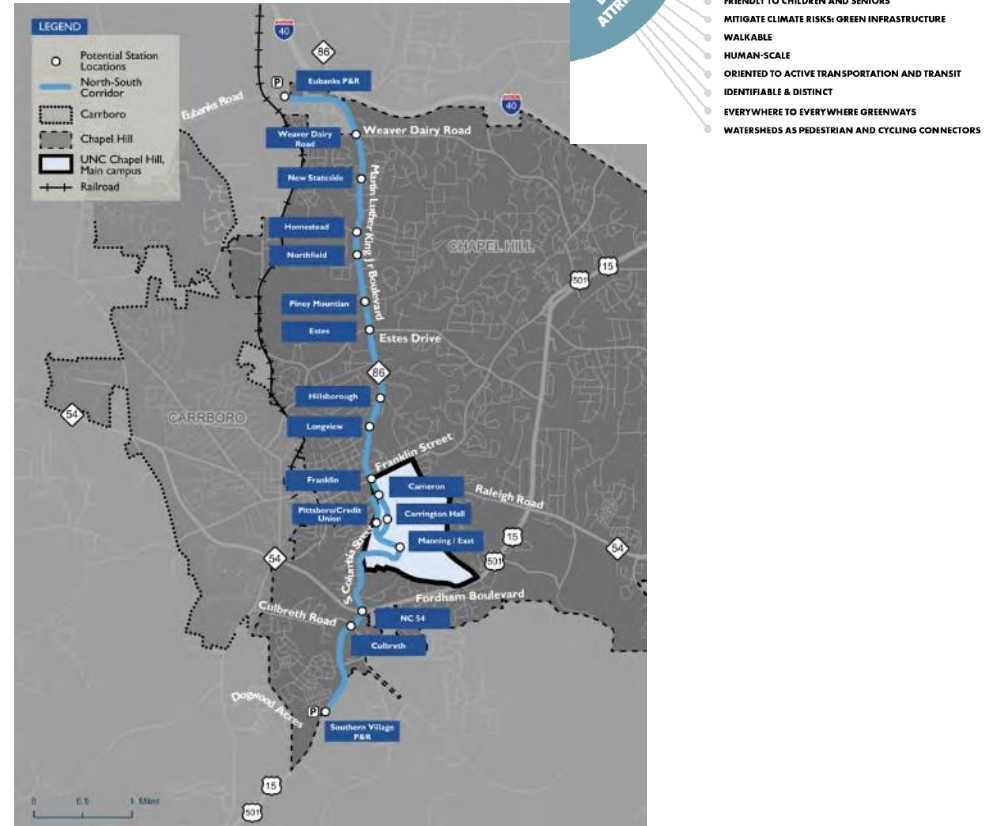


SRF Bike Network Gaps - 15-501
Chapel Hill Transit Oriented Development

Bike Network Gaps- South Columbia

Importance of Equitable Investments

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



Role of Transportation Equity Analysis

TOD Accessibility Analysis Context

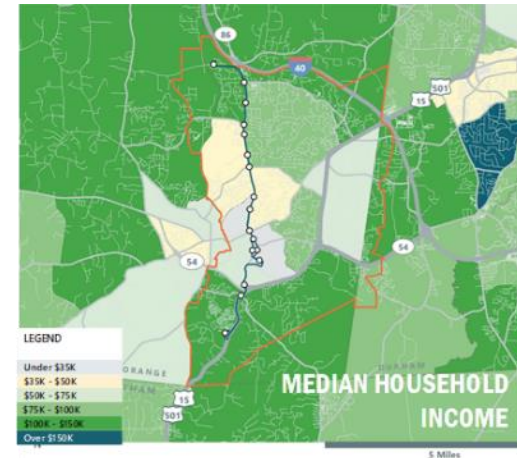
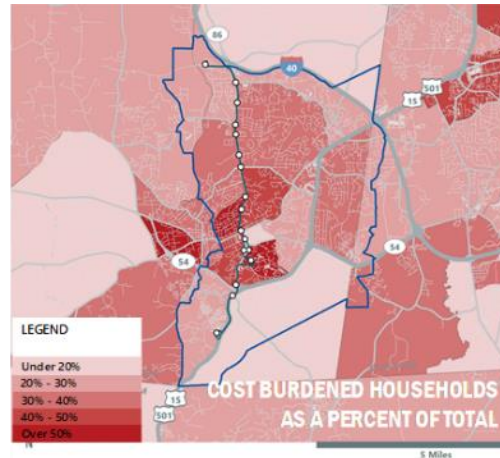
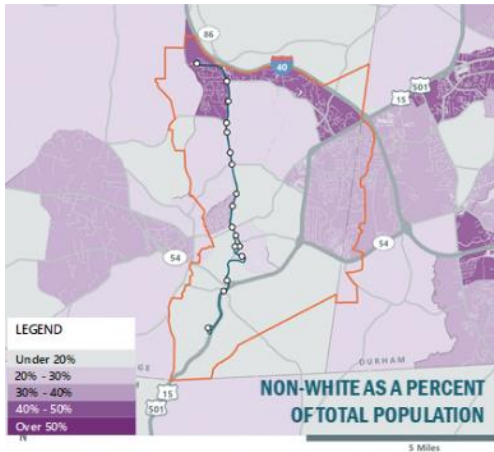
- Existing conditions along N-S BRT Corridor station areas and Focus Areas
- Reviewing studies addressing Mobility and Accessibility
- Walking + Biking + Rolling Audits with stakeholders and interested residents –gaps/barriers, safety
- Accessibility Recommendations for Station Areas and Focus Areas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

Equity Overlay

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

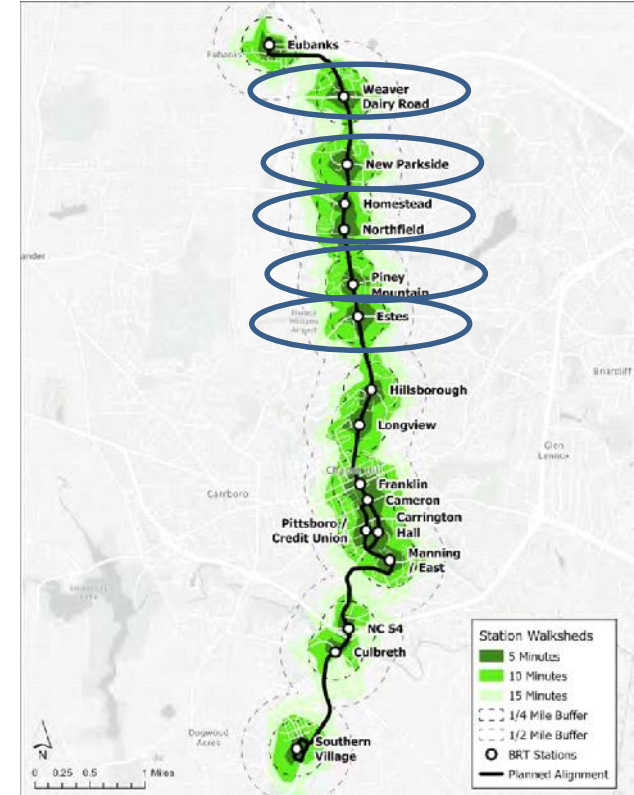
Strategies for Equitable Investments

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



Equity Priority Station Area Improvements

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



Priority Accessibility Locations—
based on equity

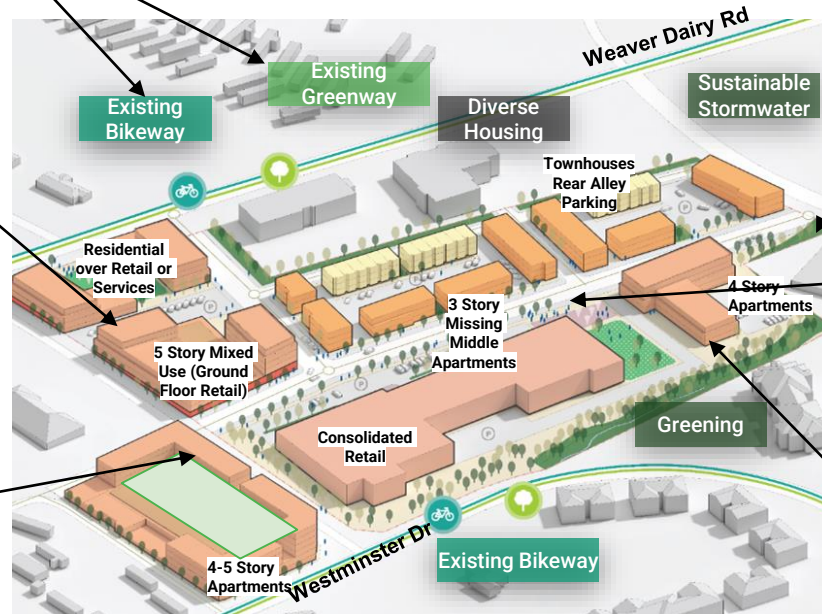
STATION AREA CONCEPT UPDATES

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

Potential Site: Timberlyne Mall

Weaver Dairy TOD

A Sustainable Mixed-Use Community



← To Martin Luther-King JR. BLVD



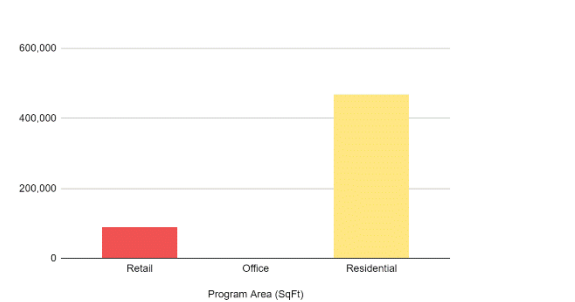
Potential Site: Timberlyne Mall

Weaver Dairy TOD



Potential change by 2040: illustrating principles, testing capacity

Use Mix (Approx)



Residential Units: 340-360

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

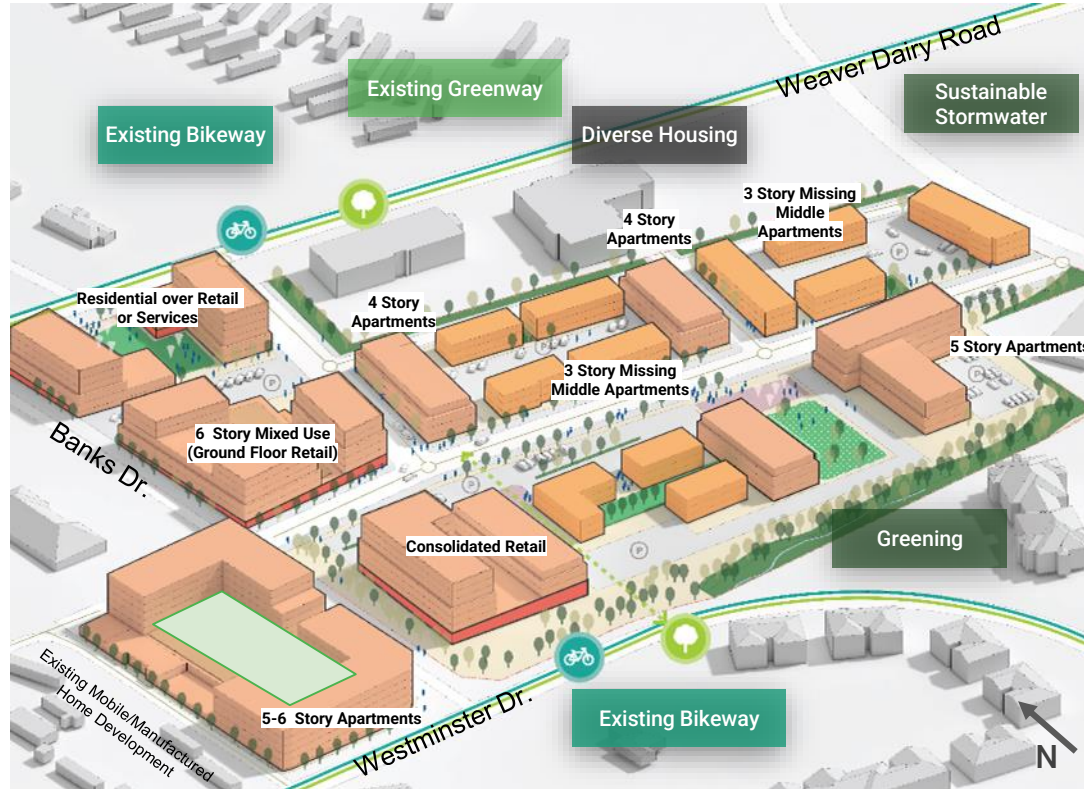
DU/Acre: 20-30



Potential Site: Timberlyne Mall

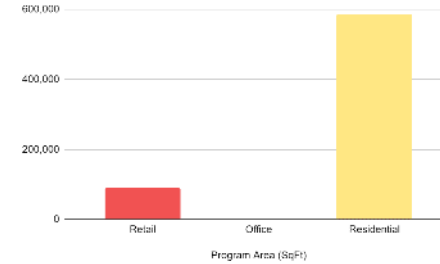
Weaver Dairy TOD

A Sustainable Mixed-Use Community



Potential change by 2040: illustrating principles, testing capacity

Use Mix (Approx): Enhanced Outputs



Residential Units: 470-490

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

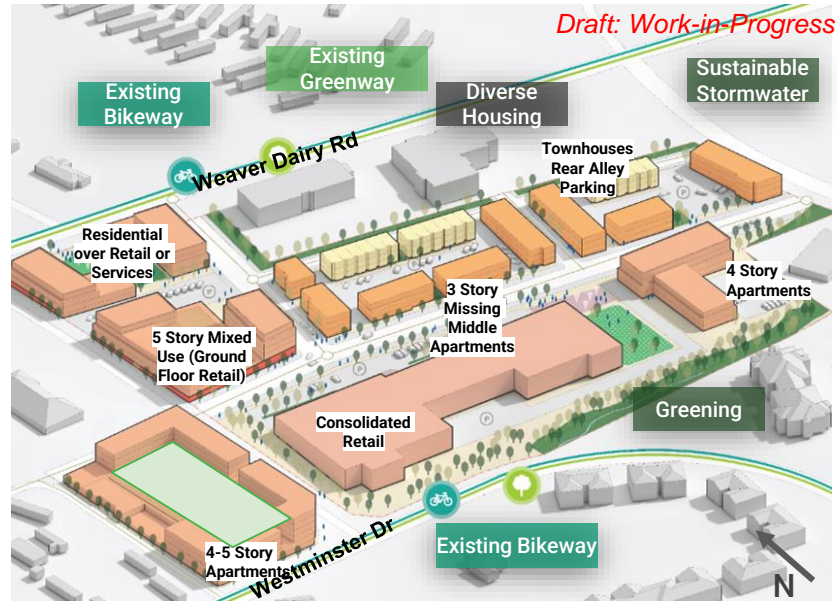
DU/Acre: 30-40



DEVELOPMENT SCALE COMPARISON

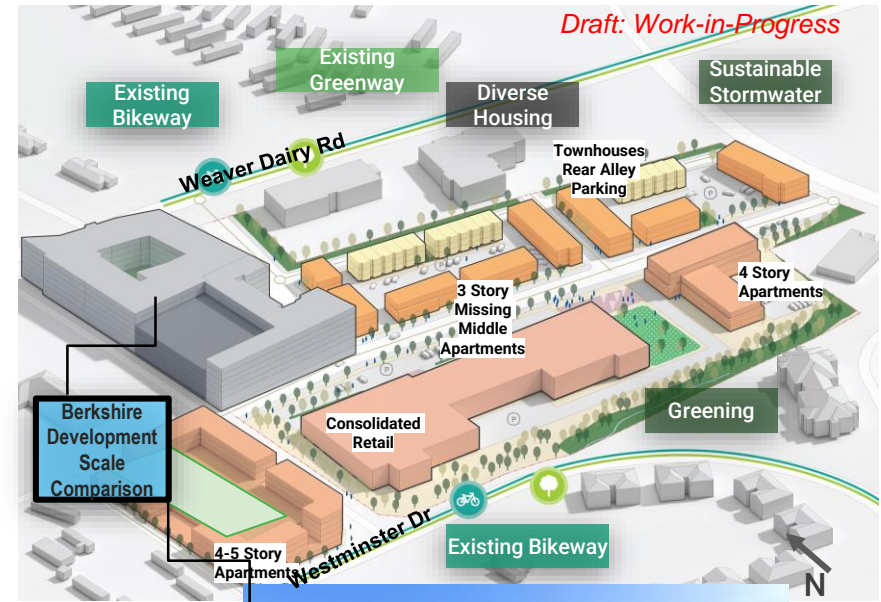
Potential Site: **Timberlyne Mall**

Weaver Dairy TOD



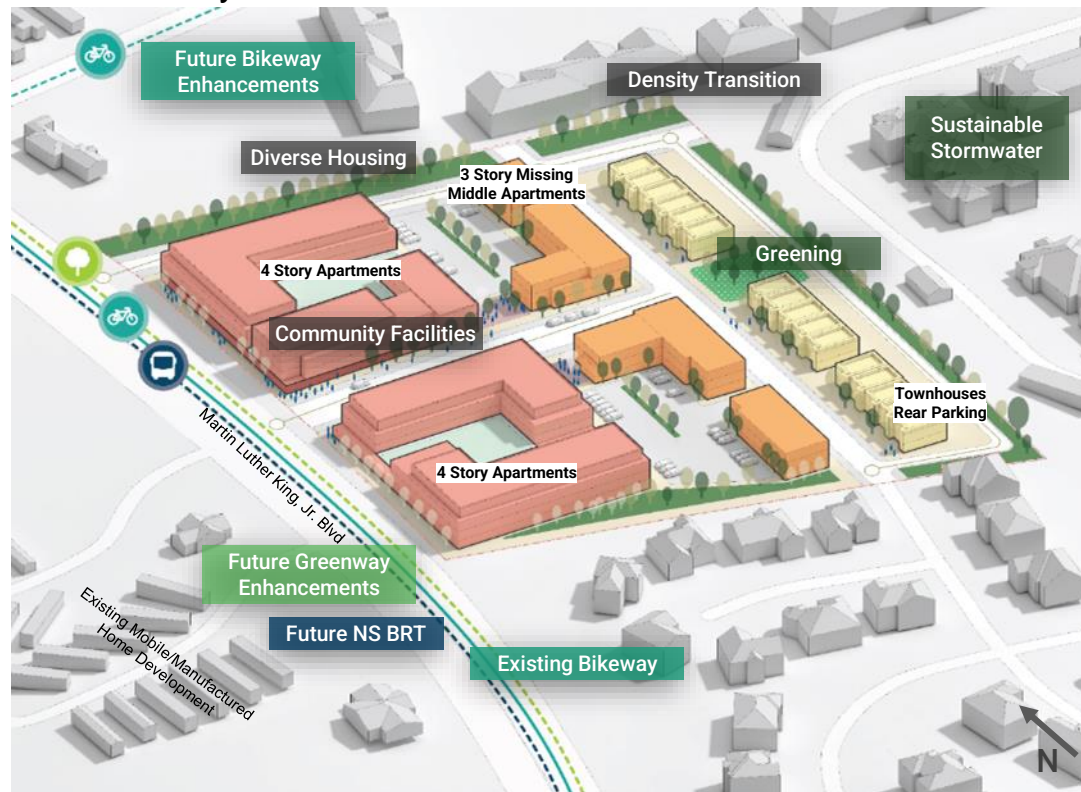
← To Martin Luther-King JR. BLVD

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



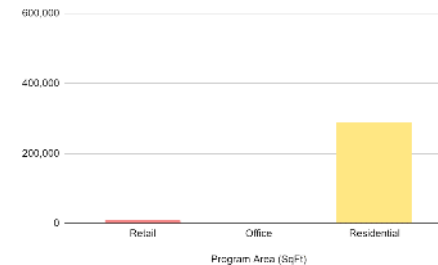
Potential Site: MLK and Westminster Drive

Weaver Dairy/New Stateside TOD



Potential change by 2040: illustrating principles, testing capacity

Use Mix (Approx)



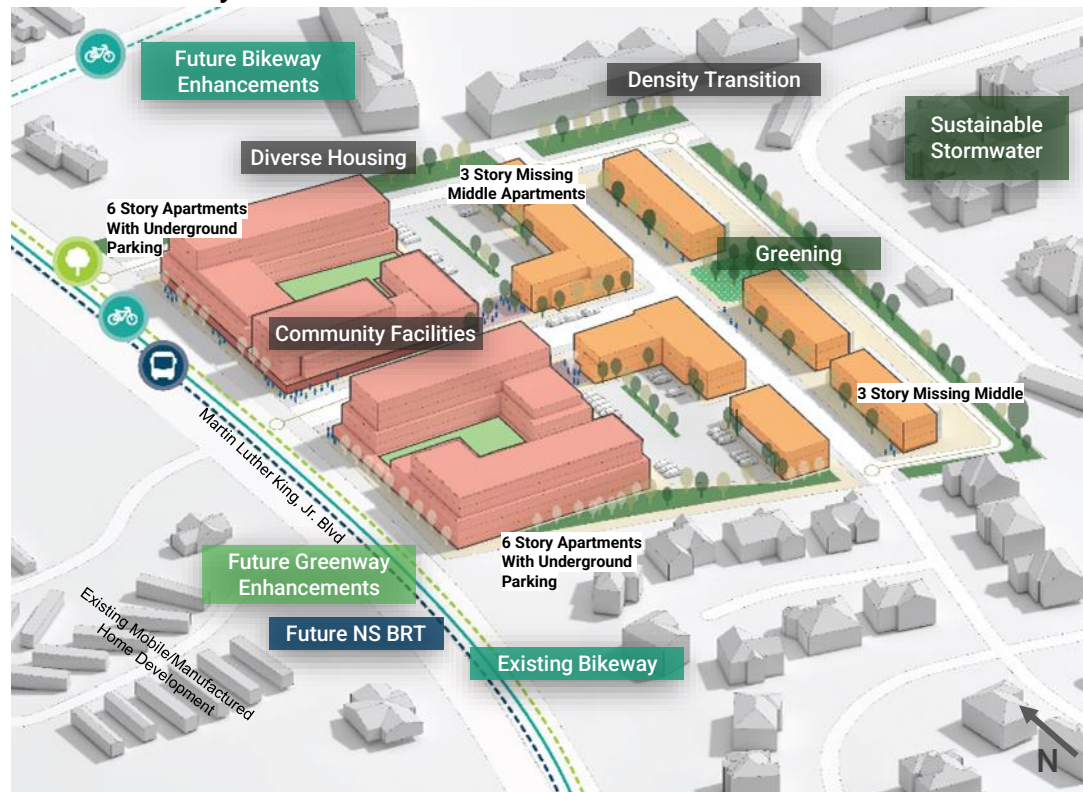
Residential Units: 200-220

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

DU/Acre: 20-25 Approx

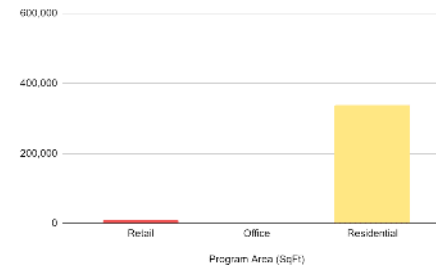


Potential Site: **MLK and Westminster Drive 2** Weaver Dairy/New Stateside TOD



Potential change by 2040: illustrating principles, testing capacity

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



Residential Units: 260-280

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

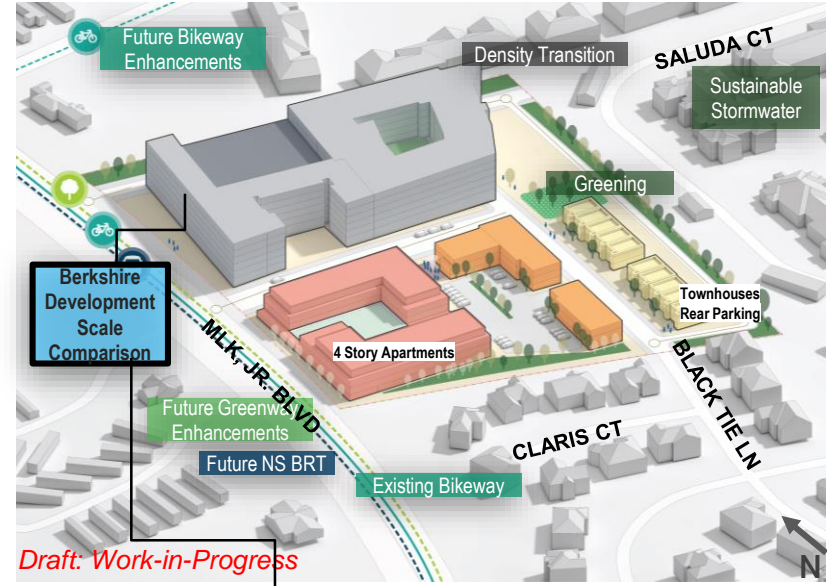
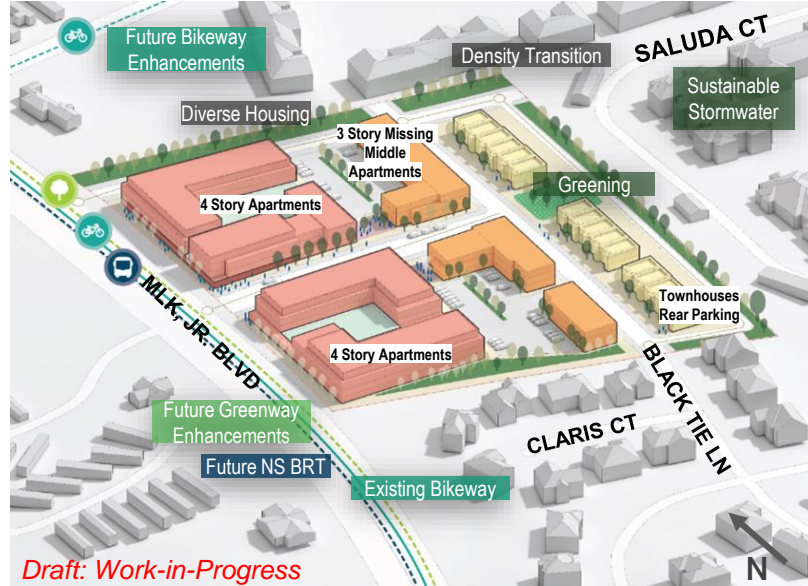
DU/Acre: 25-30 Approx



DEVELOPMENT SCALE COMPARISON

Potential Site: **MLK and Westminster Drive**

Weaver Dairy/New Stateside TOD



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



Weaver Dairy TOD



Timberlyne Mall Today



Timberlyne Mall Future

Weaver Dairy/New Stateside TOD

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

Weaver Dairy/New Stateside TOD



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

Complete Community Design Elements

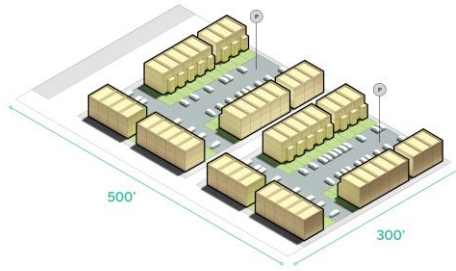
- Complete Streets provide safe and comfortable routes to BRT stations and E2E greenway network
- Station area and streets connected to adjoining neighborhoods
- Transition and distribute building mass through smaller, connected buildings
- Buildings bound and define public outdoor spaces
- Human-scaled,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



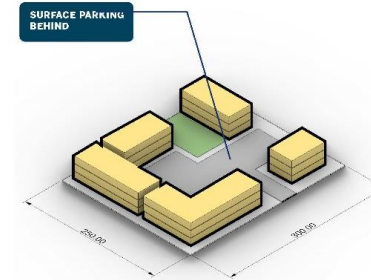
DEVELOPMENT TYPOLOGIES

Residential Typologies

3 Story Townhouse

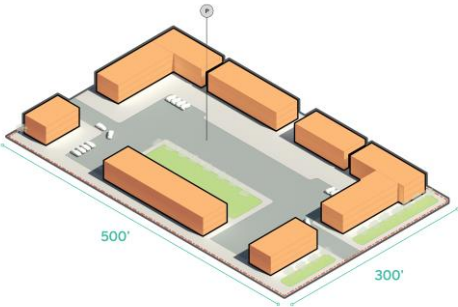


2 – 3 Story Missing Middle Apartment

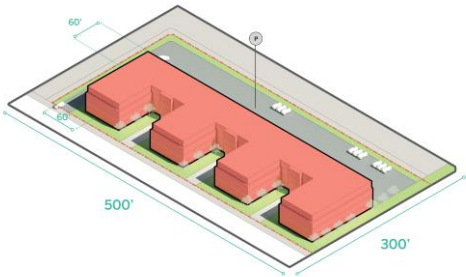


Residential Typologies

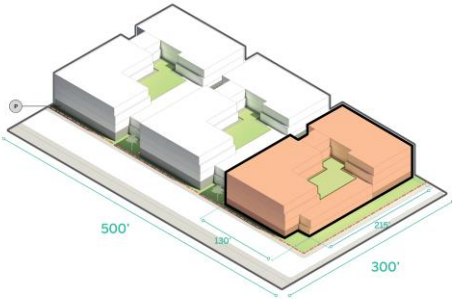
2 – 3 Story
Missing Middle Apartment



4 Story Apartment
w/ Rear Parking

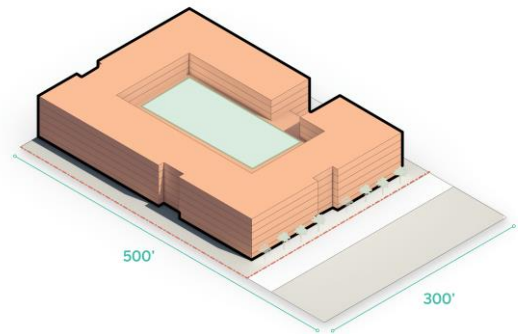


4 – 5 Story
Podium Apartment

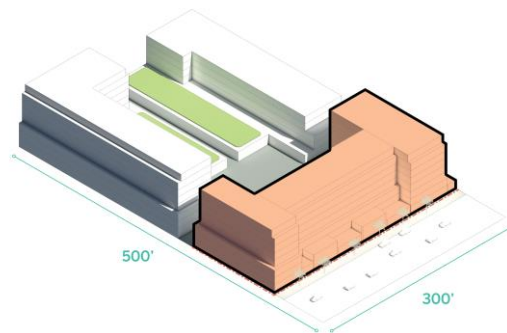


Residential and Mixed-Use Typologies

**6-8 Story
Wrap-around Apartment**

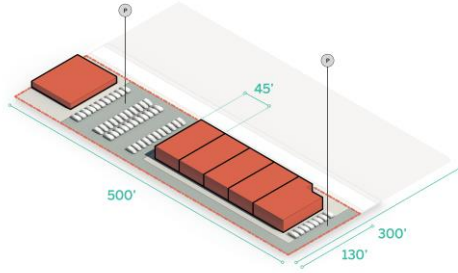


**8 Story Mixed Use
Apartment**

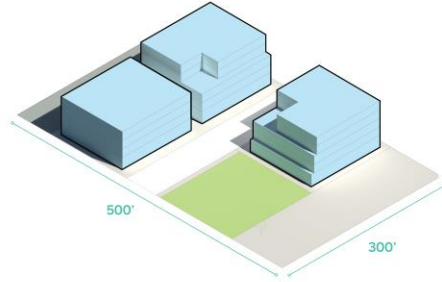


Retail and Office Typologies

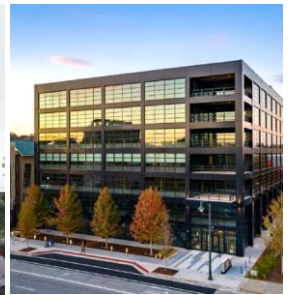
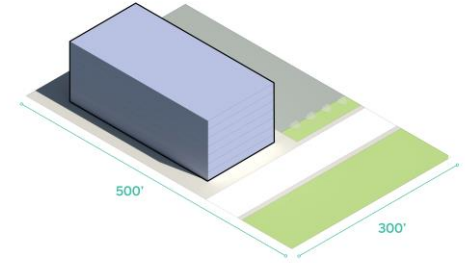
Corridor Retail



6 Story Office



8 Story Office



DISPOSITION OF COMMENTS & FEEDBACK

FOLLOW UP: Disposition of Council Member Comments & Feedback

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

FOLLOW UP: Disposition of Council Member Comments & Feedback

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

FOLLOW UP: Disposition of Council Member Comments & Feedback

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

FOLLOW UP: Disposition of Council Member Comments & Feedback

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

COUNCIL GROUPS: Feedback & Follow Up

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