



STAFF ANALYSIS

Date: April 29, 2019
To: Planning Board Members
From: Trey Akers, Senior Planner
Re: Summers Walk Phase 6 Master Plan

1. INTRODUCTION

APPLICANT INFO

- **Owner:** Blue Heel Development
- **Developer:** Blue Heel Development (Matt Gallagher)
- **Project Team:** Dewberry Engineers, Inc. (Tim Derlak)
- **Location:** 16650 Summers Walk Blvd. (Parcel IDs: 00747101, 0074112, 00747113)
- **Planning Area(s):** TND-Overlay (per previously approved master plan)
- **Area:** 19.83 acres

REQUEST

The applicant proposes the development of the final phase of a previously approved residential subdivision consisting of 41 units of townhome housing and a single-family detached house on approximately 19.83 acres. The master plan includes open space and greenway features along with street infrastructure. The applicant intends to meet all applicable requirements as part of the Master Plan process identified in Davidson Planning Ordinance (DPO) Section 14.6; the proposal is being reviewed according to the requirements in effect under the previously approved master plan (i.e. the 2012 Davidson Planning Ordinance).

2. PLANNING STAFF REVIEW

BACKGROUND

The total master plan area consists of three parcels, each fronting Summers Walk Boulevard. The two southern parcels (PID 00747101, 00747113) also front NC 73 to the south.

The proposal seeks to fulfill the requirements of the previous Summers Walk Master Plan, reapproved in 2012 and last modified in 2015. The 2012 reapproval resulted in the relocation of units away from the future West Branch Nature Preserve, then known as Phase 4 of the development, to the current location at the front of the development – Phase 6. In 2015, the master plan was modified to remove the civic use and storefront/workplace building requirements from Phase 6. A 2016 master plan that was approved for 43 units expired in June 2018, after which the current project team became officially involved.

Over the course of several months, Blue Heel Development worked with Planning Department staff to produce a plan that fulfilled the remaining requirements from the 2012 Master Plan (i.e. housing mix, affordable housing, etc.) as well as applicable ordinance criteria (i.e. street connections, centralized open space, etc.). The resulting plan proposes 41 units on approximately 20 acres and includes a variety of open space areas, greenway/trail connections, and required street infrastructure and connectivity. The following sections offer greater detail concerning specific plan features and how they do/do not meet Davidson Planning Ordinance (DPO) requirements. Note: The documentation requirements are governed by the ordinance in effect at the time of the 2012 Master Plan's approval; the process requirements are governed by the current DPO.

PLANNING AND DEVELOPMENT STANDARDS

CONTEXT

The proposed development is in keeping with the larger residential subdivision's predominant use – a mix of townhomes and single-family detached housing. The broader area remains largely rural, with a scattered patchwork of uses including enduring agricultural farms and homesteads as well as newer uses such as a behavioral health center and both active and passive regional parks (i.e. R.C. Bradford Park, West Branch Nature Preserve). There continues to be increasing residential development in the vicinity, most of which is set back from roads as proposed here. NC 73 provides the main transportation access through the area; NCDOT's plans to widen this road will likely spur further development along this main east-west corridor between Mecklenburg and Cabarrus Counties.

HOUSING

Concerning the proposed building types: With its 40 attached townhouses and one single-family detached house (Lot 36), the proposed plan meets the housing mix requirements specified by the larger 2012 Master Plan (Sheet 4, Master Plan General Notes, Lot Program). The townhouse lots size range 20-24 feet, while the single-family lot's 80-foot frontage is comparable to some of the larger lots within the existing Summers Walk development. Lastly, the proposal does not currently include affordable housing, though the project team has indicated they are actively exploring the on-site construction of units along Road E. Sheet 4 indicates that the applicant intends to satisfy the affordable housing requirements by making a payment-in-lieu, which for Phase 6 would result in a total contribution of \$132,750 for five required units. In addition, due to obligations of previous developers left unfulfilled in other parts of the development, the project team must construct or provide payment-in-lieu for eight units. The total payment-in-lieu fee for 13 units would be \$345,150.

STREETS/CONNECTIVITY/TRANSPORTATION IMPACT ANALYSIS

The proposed street network contains two street types: Residential Street Option C, modified to fit within the current Summers Walk Blvd. right-of-way; and, Residential Street Option B, which will be used as a full cross-section for Road E and feature a modified cross-section for Road D. The modifications for Summers Walk Blvd. include adding on-street parking consistent with later stretches of the boulevard further in the development, and not requiring a bike lane as shown in the ordinance depiction – again, consistent with other portions of this existing street. Road D will be modified to include a sidewalk only on the north side, since the existing multi-use path along NC 73 is just south of this proposed road.

Importantly, the plan fulfills the ordinance requirements for east-west connectivity. In this case, Roads D-E afford the opportunity to connect adjacent lands – should they develop – to provide a parallel alternative to NC 73. This proves critical as NCDOT's intended "superstreet" cross-section for NC 73 will prohibit future left-hand turns out of Summers Walk Blvd. onto NC 73 east. Road D follows existing right-of-way dedicated as part of the original master plan while Road E represents a new connection in fulfillment of ordinance requirements.

A transportation impact analysis (TIA) was not deemed necessary for this development – Phase 6 – which is part of a larger, previously approved master plan and proposes a unit count/mix within the already agreed-to acceptable unit ranges. Regarding vehicular movements: Public Safety personnel identified a potential conflict at the intersection of Road D and the existing, landscaped entrance island in the middle of Summers Walk Boulevard. It is recommended that the northern tip of this island be removed to allow an unencumbered intersection, especially with the anticipated importance of Road D as an east-west alternative to NC 73 noted above.

Finally, parking will be handled both on-site (i.e. via driveways on lots) and, for visitors, via on-street parking along Summers Walk Boulevard. Parking will not be permitted in alleys, as specified by the Police/Fire and Public Works Departments, which is consistent with other alleys throughout Summers Walk.

OPEN SPACE/GREENWAYS/TREE PRESERVATION

In terms of open space criteria, the plan relies on the areas set aside as part of existing open spaces within the Summers Walk development – including the West Branch Nature Preserve – to satisfy the DPO requirements from the original master plan (60.4% open space). The areas of Phase 6 approved for development and open space as part of the 2012 Master Plan have not changed. Within this framework, however, the plan works to connect these existing open spaces areas as well as create a new gathering space. Altogether the plan sets aside 4.5 acres of open space (23%) for Phases 6A-C, with 1.5 acres designated as undisturbed open space (8%).

Accordingly, the plan links existing but disconnected portions of the Summers Walk development by providing an east-west pedestrian walkway across Summers Walk Boulevard and a trail connecting the multi-use path on NC 73 with the existing trail running on the south/southwest side of Helen Benson Boulevard. Ultimately, this provides a direct link to the West Branch Nature Preserve. Similarly, the east-west walkway ensures continuity of connection and safety for residents living on the west side of Summers Walk Blvd. by providing a direct, shortened crossing distance across this main street.

But, the east-west walkway does more than provide connectivity: It's also designed in a way that fulfills DPO 9.1.1, which focuses on the integration of parks/open spaces throughout development as celebrated features rather than residual areas behind houses, placed in a corner, or tacked onto the end of a block. Specifically, the ordinance references such spaces as “special places for social activity and recreation,” underscoring the importance of centralizing and celebrating some of these spaces as organizing components of the proposal. With its series of benches, landscaping, and focal point on the west side of Summers Walk Blvd., the east-west walkway strives to marry the functionality of connection to the beauty of place-making. Additionally, in response to staff and Planning Board comments, the project team modified the trail alignment to follow the land's contours more closely so that users can experience more of the site's natural areas and not just views of the natural areas while walking adjacent to the Alley A.

The plan also contains information based on an Environmental Inventory (EI) conducted. The EI included a survey of the trees impacted by development within Phase 6 (Sheet 3), many stands of which were found to be comprised of mature trees. The latest EI identifies specimen trees as required by the ordinance; however, the ordinance applicable to the 2012 Master Plan, to which this proposal is subject, does not contain a minimum preservation requirement. Nevertheless, the most recent plan now includes an open space area surrounding an existing 38-inch oak specimen tree on the west side of Summers Walk Boulevard. Located between Lots 28-29, the area is sized to accommodate most (if not all) of the tree's canopy. This design feature is not required but will serve to fulfill the ordinance's preservation aims while likewise creating a distinct, celebrated feature within the development.

Finally, the EI also proposed that the existing “Bark Park” be relocated away from its current location – which is envisioned to potentially contain the affordable housing units along Road E. The project team

has stated that they're in discussions with the HOA regarding this facility's relocation; the original master plan did not include this feature.

3. PUBLIC PLANS & POLICIES

Below is a list of town-adopted documents and a brief summary of each's applicability to the proposed master plan:

- The ***General Principles for Planning in Davidson (2015)*** include tenets to guide development in Davidson. Principles relevant to this proposed development are listed below. They can be summarized as: Residential development should include a variety of housing and transportation options integrated with thoughtful open space preservation.
 1. We must preserve Davidson's character and sense of community.
 - Compact developments with community open space
 - Engaging public spaces
 - A street, sidewalk, and greenway network that knits the community together
 - Neighborhoods welcoming to all citizens
 - Neighborhoods as integral parts of town
 3. We must encourage alternative means of active transportation.
 - New greenway, bike, and sidewalk connections to existing developments
 5. We must create an environment that fosters diversity. To encourage diversity of all economic levels, all races and ethnic groups, all ages, and all physical and mental abilities we will:
 - Provide a mixture of housing types and prices in every neighborhood
- The ***Davidson Comprehensive Plan (2010)*** characterizes the project site area as an approved "Smart Suburban" context, describing these areas as "...transition areas between the more intense growth targets and existing low-intensity neighborhoods or protected open space. Residential development, public services and civic uses (such as churches and schools) and additional neighborhood-support centers are ideally located within" these areas.
- The ***Town of Davidson Water/Sewer Policy (2018)*** requires a determination by Charlotte Water regarding their ability to serve a site as well as whether a development proposal constitutes an extension (i.e. construction of a non-existing line) or connection (i.e. tapping into an existing line). This proposal did not require a determination since the existing Summers Walk development is already served by adequate water/sewer facilities.

4. OUTSTANDING ISSUES

Below is a list of items that require further clarification/resolution prior to the plan's approval; the list has been updated to reflect the plans revised since the March Planning Board meeting. They are consolidated here to provide a single location for the identified issues. Note: All items have been addressed but there is one new item that has arisen and will be addressed as part of the Construction Documents.

- Trail Loop: The trail connection has been modified to allow users to experience more of the site's undisturbed open space in Future Phase 6D.
- Specimen Trees: The EI has been modified to identify potential specimen trees and the site plan has been modified to save a 38-inch oak tree between Lots 28-29.

- Entrance Island: The northern tip of the entrance has been modified to allow full access throughout the Summers Walk Blvd. and Road D intersection. Note: This area has been further reduced in order to accommodate the shifting of lots and realignment of Alley A and Road D.
- Visitor Parking: Additional visitor parking has been added on the west side of Summers Walk Boulevard.
- Stormwater BMP: This is a new issue. It has been noted in the most recent review that this facility and its related grading activities partly infringe within the 50-foot and 75-foot undisturbed buffers on the site's eastern boundary. The project team has been made aware of this and will adjust the facility's location prior to Construction Documents submittal. This item does not affect staff's or the Planning Board's review of the proposed Master Plan.

5. FYI OR REQUIRED ACTION

This is the third time the Planning Board has seen these plans. At the February and March Planning Board meetings board members offered informal comments, several of which have been addressed in the latest plans. For the April Planning Board meeting, board members are asked to provide a consolidated set of final/formal comments to be included as part of staff's technical review of the proposal.

6. HISTORY/NEXT STEPS

- Application/Preliminary Sketch Plan Submittal: February 2019 [Complete]
- Planning Board FYI Presentation: February 2019 [Complete]
- Public Input Session: March 2019
- Planning Board FYI Presentation 2: March 2019
- Master Plan Schematic Design Submittal: April 2019
- Planning Board Review & Comment: April 2019
- Final Master Plan Submittal for Review/Approval: May 2019
- Preliminary Plat (i.e. Construction Documents): TBD

7. RESOURCES & ATTACHMENTS

ATTACHMENTS

- Master Plan Schematic Design, Application, & Statement of Intent: <http://www.townofdavidson.org/1053/Summers-Walk> (see "Documents" tab).

RESOURCES

- Davidson Planning Ordinance (2015): <http://www.ci.davidson.nc.us/DocumentCenter/View/8499>
- Comprehensive Plan (2010): <http://www.townofdavidson.org/340/Davidson-Comprehensive-Plan>