Charterwood

Rezoning Statement of Justification

WCA Partners

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The Charterwood property is a 15-acre parcel with 1,300 feet of road frontage on Martin Luther King, Jr. Boulevard. This property was highlighted as a “development opportunity site” in the Town’s Northern Area Task Force (NATF) study that was completed in 2007. The study required approximately 12 months to complete, during which time a moratorium on building in this area was imposed. This allowed a citizen-based task force to consider land uses, intensities, and styles of development along the MLK Jr. Boulevard gateway to Chapel Hill.

The NATF policy recommendations were adopted by the Chapel Hill Town Council as part of the Comprehensive Plan in January 2008. The Council adoption of the Northern Area Task Force’s recommendation for this property accepted the goal of creating a mixed use village, with a combination of housing, retail, office and other uses that would take advantage of existing infrastructure, including the bus, cycling and walking transportation alternatives that exist in the MLK Corridor. This Corridor is a primary connector to the emergent Carolina North Campus of UNC, as well as the UNC Main Campus and UNC Hospital, the two largest existing employment destinations in Chapel Hill.

This property is currently zoned R-2, which allows only residential land uses. In order to develop the land uses and density that are prescribed in the Comprehensive Plan’s mixed use recommendations for the property, the current zoning must be replaced by a new zoning classification. We requesting the Mixed Use Village – Arterial (MUV-A) zoning district under which to develop the property. This district classification will allow for the mix of uses that are proposed. We are requesting this zoning for the portion of the property that is generally at the edge of MLK Boulevard, an area of 9.2 acres. The portion of the property in proximity to the existing neighborhood development is not proposed for a rezoning. We will develop this portion of the property under the existing R-2 (Residential 2) district classification. We have made this choice in respect of the neighboring property owners’ rights. In addition, we have increased substantially the buffer land that is being set aside between the neighbors in Parkside and Northwoods.

Under the existing R-2 zoning the property could be developed with up to 62 units of housing. We are requesting rezoning for the portion of the property, 9.2 acres, at the edge of MLK Jr. Boulevard to achieve the following proposed program of mixed uses.

- 155 housing units in multifamily and townhouse configurations
- A maximum of 87,000 square feet non-residential – office, retail, etc.
- 3 –acre park and greenway
- Renovation/Adaptive re-use of the Altemueller farm house (approximately 1,500 s/f)
Charterwood Permitted Uses

This Statement of Justification establishes the following permitted and prohibited uses for the Charterwood Mixed Use Village. It provides for a mixture of complementary uses and intensities that support transit as well as alternative modes of transportation including primarily walking and cycling.

Permitted Uses

Uses within the "Residential" land use category include the following:
- Dwelling units, single family,
- Dwelling units, two-family with accessory apartments,
- Dwelling units, duplex,
- Dwelling units, multifamily, three to seven dwelling units,
- Dwelling units, multifamily, over seven dwelling units,

Uses within the "Non-Residential" land use category include the following:
- Business, office-type,
- Child/adult day care facility (See section 3.6),
- Clinic,
- College or university,
- Essential services,
- Fine arts educational institution,
- Hotel or motel,
- Research activities,
- Bank, including drive-through
- Bank ATMs, Walk-up and Drive-through
- Barber shop/beauty salon,
- Business—convenience,
- Business—general,
- Business—wholesale,
- Manufacturing, light,
- Medical office,
- Office – general,
- Personal services,
- Places of worship,
- Public cultural facility,
- Public service facility,
- Public use facility,
- Publishing and/or printing,
- Recreation facility: Commercial,
- Veterinary Hospital or Clinic
ADDRESSING THE MAJOR THEMES OF THE CHAPEL HILL COMPREHENSIVE PLAN

In addition to responding to the recommendations made by the Task Force in the Northern Area Study, we have also been responsive to the major themes of the Chapel Hill Comprehensive Plan in our approach and philosophy in planning the Charterwood community.

The Comprehensive Plan identifies twelve major themes for the “further balanced development of Chapel Hill, as well as the preservation and safeguarding of existing neighborhoods that have become a hallmark of the quality of life in Chapel Hill”. The Northern Area Task Force report and recommendations were developed as part of a more refined look at a specific area of Chapel Hill in the same manner as previous small area plans and neighborhood protection plans. The following discussion addresses how the proposed Charterwood community plan will achieve the goals and expectations of both the Northern Area Task Force plan and the Chapel Hill Comprehensive Plan.

♦ **Identify areas where there are creative development opportunities**

The Charterwood development proposal/concept addresses all the recommendations that were made for this property in the Northern Area Task Force Study. These recommendations included the opportunity for a mixed use transit-oriented village, the saving of the Altemueller farm house, protection of the site’s heritage, retention of specimen trees, and the creation of housing opportunities along the high volume MLK transit corridor. Our proposal is a creative and excellent example of transit-related smart growth that respects and will enhance the adjacent neighborhood.

♦ **Encourage desirable forms of non-residential development**

This property, located on the MLK transit corridor, in proximity to UNC’s Carolina North Campus and an existing concentration of retail at Timberlyne and Chapel Hill North shopping centers, offers a unique opportunity for mixed use development, to further the “walkability” of an area where shopping, employment and housing in combination with transit are already present. Our proposals for non-residential development comprise retail, office, health care, hotel and other uses that will add to the availability of retail, and professional and personal services in the area. This development will also add to the economic base potential of the town.

♦ **Conserve and protect existing neighborhoods**

A significant effort has been and will continue to be community outreach, and working collectively and individually with Charterwood’s neighbors. We have held community meetings and one-on-one in home meetings with several neighbors, and intend to ensure that the neighbors’ full enjoyment of their properties will be maintained. An important element in all new development in Chapel Hill is the protection of existing neighborhoods and our efforts will continue to focus on this. We also have committed to the preservation and adaptive re-use of the old Altemueller farm house located on the property. This will be an ongoing process involving the Preservation Society, preservation experts and potential future users of the building.

♦ **Conserve and protect the natural setting of Chapel Hill**

More than forty five percent of Charterwood’s land area will be open space, including the proposed 3-acre Charterwood Park. In addition, careful planning and tree protection efforts will be incorporated in
our process to preserve significant trees where feasible. Seventy six (76) specimen trees (larger than 24”) have been identified for preservation.

- **Maintain the Urban Services/Rural Buffer Boundary**
  This development/property is located in the urban services district where development-supporting infrastructure is in place. There will be no encroachment on the rural buffer.

- **Participate in the regional planning process**
  This property is located in the MLK transit corridor less than ½-mile from Interstate 40. Development in this location will be accessible to local and regional (TTA) transit service, which is an important objective of the Triangle’s regional planning. This will result in fewer local and regional auto trips.

- **Work toward a balanced transportation system**
  This project is based on alternative transportation options coupled to smart land use. By building housing where transportation options exist, residents will avail themselves of auto-alternative modes of accessing destinations in Chapel Hill. In this location a household with a member employed in Chapel Hill (e.g. at a University job) could reduce their ownership of an auto. Recent transportation research shows this to be the case. (The recently published (2008) study, “Effects of TOD on Housing, Parking and Travel”, by the Transit Cooperative Research Program, is an excellent study on this subject)

- **Cooperatively plan with the University of North Carolina at Chapel Hill**
  This property is located less than one mile from the new Carolina North Campus of the University of North Carolina at Chapel Hill. Charterwood’s housing, retail, office and other development components will be complementary to the University and growth initiatives. A key linkage between this project and the University is the potential to offer housing opportunities to university employees in a location where these employees could walk, cycle, or ride a bus to work. By using alternatives to the auto the University could reduce the amount of parking required on campus as well as significantly reduce employee commuting costs. A hotel at this location would also serve the lodging needs of tourists attending UNC events as well as business visitors to UNC, particularly as the Carolina North Campus is built out.

- **Develop strategies to address fiscal issues**
  This development would have significant positive impacts for the Town in terms of tax revenues. Based on the proposed development program, there would be property and sales and occupancy taxes that would be generated in significant amounts.

- **Create and preserve affordable housing opportunities**
  The proposed 155 units of rental housing in Charterwood will offer reasonably affordable housing opportunities. Should any of this rental housing be converted in the future to for-sale housing, we will comply with the town’s inclusionary housing ordinance for payment in lieu of other alternative methods of supplying affordable housing units.

- **Complete the bikeway/greenway/sidewalk systems**
  Two sections of 10 foot greenway trail through Charterwood have been proposed that would connect to and be part of the Town’s future greenway system. A total length of approximately 2,500 feet of
greenway trail is proposed. This trail will accommodate pedestrians and cyclists. The park through which part of this trail will run will serve as an amenity for not only this community but also neighboring communities. In the process of developing this community the developer desires to work with the Town in improving walking and cycling travel alternatives to induce this activity.

- **Provide quality community facilities and services**
In coordination with developers in this area, the Town can improve its services and facilities in the area by targeting intelligent strategic investments.

**Concluding Note**

In the Overview to the “Major Themes” section of the Town’s Comprehensive Plan it is stated that “the plan (also) strives to create initiatives to enhance a community that is already exceptional. In this sense the plan aims not merely to “hold the line” on community character, but also to “raise the bar” of expectations for such characteristics as pedestrian and bicycle friendliness, the diversity of activity downtown, and the integration of greenways and open space into the fabric of the community. This proposed plan will create a community and a “place” that will be among the best in Chapel Hill.”
This document provides an Energy Management Plan for Charterwood, a mixed use development proposed for a 15-acre parcel located on the west side of MLK Jr. Boulevard in Chapel Hill. This document has been prepared in accordance with the requirements of the Town of Chapel Hill’s suggested framework for an Energy Management Plan. Energy management plans and energy reduction goals are required for all Special Use Permit applications made to the Town.

**Prelude**

The Charterwood development is a mixed use development that will occur in the high volume transit corridor of the MLK Jr. Boulevard. The community has been planned and designed as a Transit Oriented Development (TOD) that links land use with transportation options, with the key objectives of promoting auto-alternative mobility options. The developer will undertake a number of initiatives to promote walking and walkability, the use of bus transit, and bicycling as alternatives to automobile usage. It is estimated that at least twenty percent of the projected trip-making to and from Charterwood will not be automobile based trips, but rather trips involving Chapel Hill Transit buses, or walking or biking. If this level of alternative mobility modes is achieved, and this is a realistic objective, a 20 percent reduction in carbon emissions would be immediately achieved from reduced auto usage from this initiative alone by the time Charterwood reaches buildout.

Charterwood will be Leadership in Energy and Environmental Design for Neighborhood Development (LEED-ND) certified. By virtue of this certification the community will achieve very high levels of energy efficiency and substantial reductions of carbon emissions. Studies show that strong linkages between transportation and land use have significantly greater effects on energy use and carbon emissions reduction than any other strategies, such as building construction methods, energy efficient appliances and equipment, etc.

The following goal statements and objectives address how Charterwood will comply with Town goals relative to energy management and energy efficiency.

**Charterwood Energy Management Plan Goal Statements**

1. Contribute to the Town’s goal of reducing carbon emissions by 60 percent prior to 2050.

2. Implement strategies for sustainability in the construction and operations of Charterwood.

3. Utilize sustainable energy in the construction and operations of Charterwood.
Charterwood Construction Energy Management Plan Objectives

1. Achieve minimum energy efficiency improvements that meet or exceed 20 percent over ASHRAE 90.1, 2004.

2. Give consideration to using alternative fuels and technologies that represent sustainable energy technology.

3. Incorporate elements that help to ensure a high level of indoor air quality, adequate access to natural lighting and other indoor environmental quality attributes.

4. Give consideration to the purchase of carbon offset credits or green power production through coordination with a designated, recognized greenpower program.

Charterwood Energy Management Plan General Elements

The following provides a list of techniques, products, strategies, etc. that provide alternative means of achieving the 20% improvement objective and other energy management plan objectives.

1. Use of photovoltaic panels, alternative fuels, solar thermal, day lighting, enhanced insulation, performance elevators, high performance motors, high performance building shell materials, carbon offset/greenpower credits, indoor environmental quality, air filtering, LED products, fresh air make up, enthalpy wheels, and other products, strategies and techniques.

Charterwood Energy Management Plan Specifics

For all buildings in Charterwood, at the building permitting stage, engineering calculations, product specifications, and descriptions and explanations of expected results will be provided. The engineering calculations, product specifications, and narrative will be signed by a licensed engineer. The following specific plan elements will typically be included:

Residential Structures

HVAC Equipment

- 15 SEER heat pumps, achieving 30 to 35 percent more efficiency over code
- Programmable thermostats
- Energy Star windows with low-e glazing
- Insulation R values 10 percent or more above code

Lighting

- High efficiency compact fluorescent lighting with space sensor controls
- High efficiency dark sky site and parking area lighting with space sensor, photocell or timer controls
- Architectural daylight with daylight factor equal to 2% average in residential units and, where possible, in common areas

**Other**

- Provide education in use of programmable thermostats and carbon footprint awareness to all residents

**Commercial Structures**

**HVAC Equipment**

- Buildings will be fitted with equipment that is 20 percent more efficient than ASHRAE 90.1-2004. The products and calculations will be provided with building permit applications.
- Increased R values for thermal components that will exceed Building Code requirements by at least 20 percent, will be utilized. Products and R values will be provided with building permit applications.
- Rooftop mounted HVAC equipment with an EER rating at a minimum of 12 and a 100 percent air economizer cycle with be provided. Product data will be provided with building permit applications.
- Energy calculations will be provided for all Conditioned Areas with calculations provided at the building permit phase.

**Lighting**

- Exterior lights will be provided with photo cells, sensors and timers for lighting controls.
- Exterior lighting will have dark sky, minimum lumens to meet building code.

**Other**

- Energy summaries for each major electrical item including lighting sources/products, HVAC equipment, water heaters, appliances, elevators, etc. will be made. These calculations will be provided with the building permit applications.
- Buildings will be sited and designed, where possible, to take advantage of optimal solar orientation.
- All coolants for HVAC will be Chlorofluorocarbon (CFC) free. Likewise, all fire protection systems will be CFC free.
- Ongoing education to tenants of building operation systems will be provided.
• A recycling program will be implemented during building construction to ensure a minimum of 50 percent of construction waste is recycled. Receipts from Waste Management Company will be available for verification.
• Wherever possible, recycled products will be used in Charterwood.
• Paints, adhesives and finish materials will be VOC free-low emitting materials
• Whenever possible, owner will purchase green power production through coordination with the NC Green Power Program or through other sources for wind credits, hydroelectric power or other green power agencies.
• Charterwood will be developing and implementing a water re-use system for irrigation of plant materials; plant materials in Charterwood will be largely indigenous plants suitable for this Zone 6b climate and requiring lower water/irrigation rates. It is the objective of Charterwood not to use potable water for any irrigation.
• Charterwood will also utilize water saving fixtures that will be at least 20 percent more efficient than required per Code.