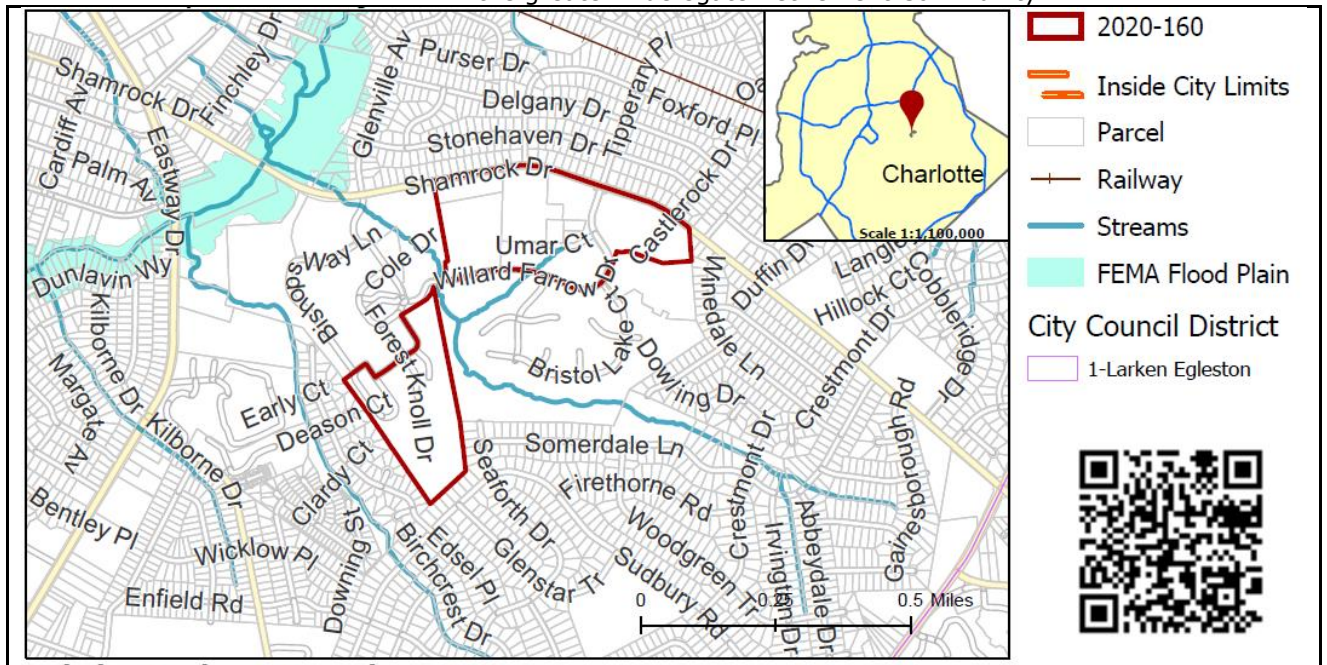


REQUEST

Current Zoning: R-17MF (multi-family residential), INST (institutional), and INST(CD) (institutional, conditional)
Proposed Zoning: UR-2(CD) (urban residential, conditional) and MUDD(O) (mixed-use development, optional) with 5-year vested rights

LOCATION

Approximately 70.014 acres located along Shamrock Road within the greater Aldersgate Retirement Community.



SUMMARY OF PETITION

The petition proposes to rezone approximately 70 acres into two zoning districts (UR-2(CD) and MUDD-O) to allow further development of an age restricted mixed-use community at the site.

PROPERTY OWNER
PETITIONER
AGENT/REPRESENTATIVE

Aldersgate United Methodist Retirement Community
Aldersgate United Methodist Retirement Community
Bridget Grant, Moore and Van Allen

COMMUNITY MEETING

Meeting is required and has been held. Report available online.
Number of people attending the Virtual Community Meeting: 31

STAFF
RECOMMENDATION

Staff recommends approval of this petition.

Plan Consistency

The petition is **inconsistent** with the *Eastland Area Plan's* (2003) recommendation for institutional uses at the site.

Rationale for Recommendation

- The request for a mixture of residential and non-residential uses in an institutional setting achieves the plan's goal of creating a "balanced mixture of land uses".
- The site's mixture of uses (including community centers, medical office, youth centers) would provide a benefit to the surrounding community outside the rezoning boundary.

- The proposal commits to phased transportation improvements (pedestrian crossings/signals, turn lanes, etc.) to improve transportation safety and accessibility for the site.
- The request also achieves the plan's goal of "supporting strong neighborhoods" through ongoing investment in area neighborhoods.
- The added residential density (9.18 dwelling units per acre (DUA)) is balanced by the proposed mixture of on-site neighborhood services such as civic centers, personal service/EDEE/retail uses, and medical offices.

The approval of this petition will revise the adopted future land use for Development Area 2 as specified by the *Eastland Area Plan* from institutional to residential/office/retail for the site, and will revise Development Areas 1, 3 and 4 from institutional to residential uses up to 12 DUA.

PLANNING STAFF REVIEW

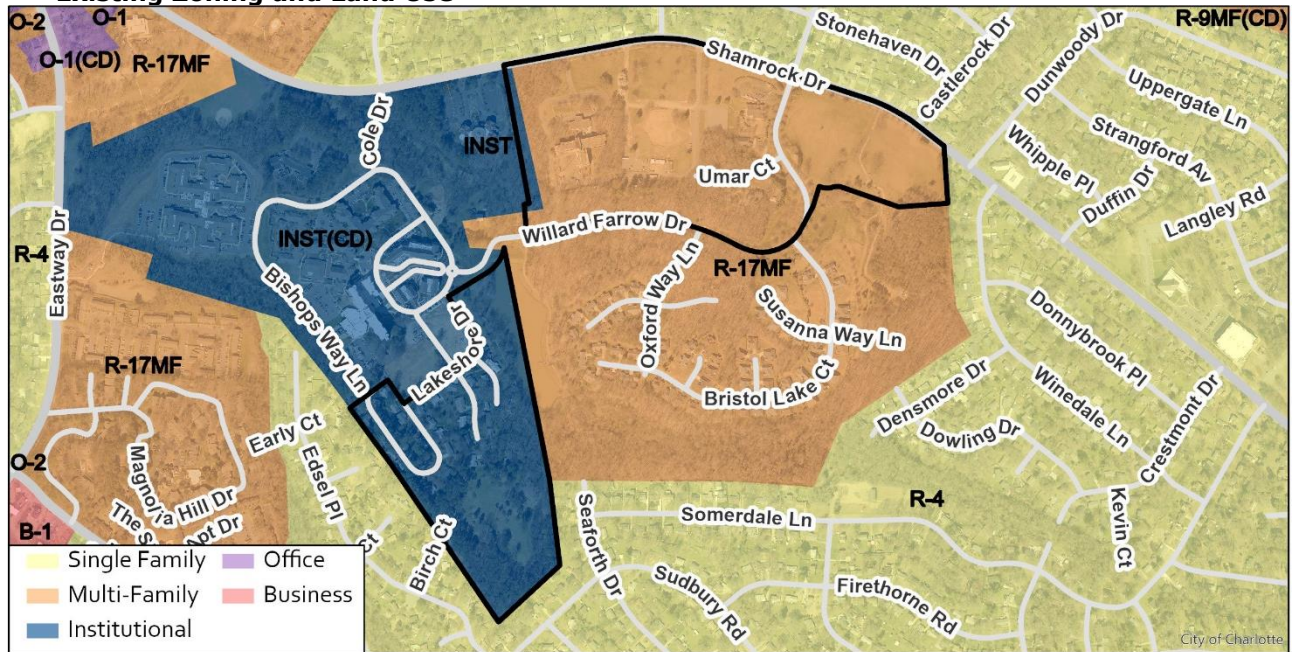
- **Proposed Request Details**

The site plan accompanying this petition contains the following provisions:

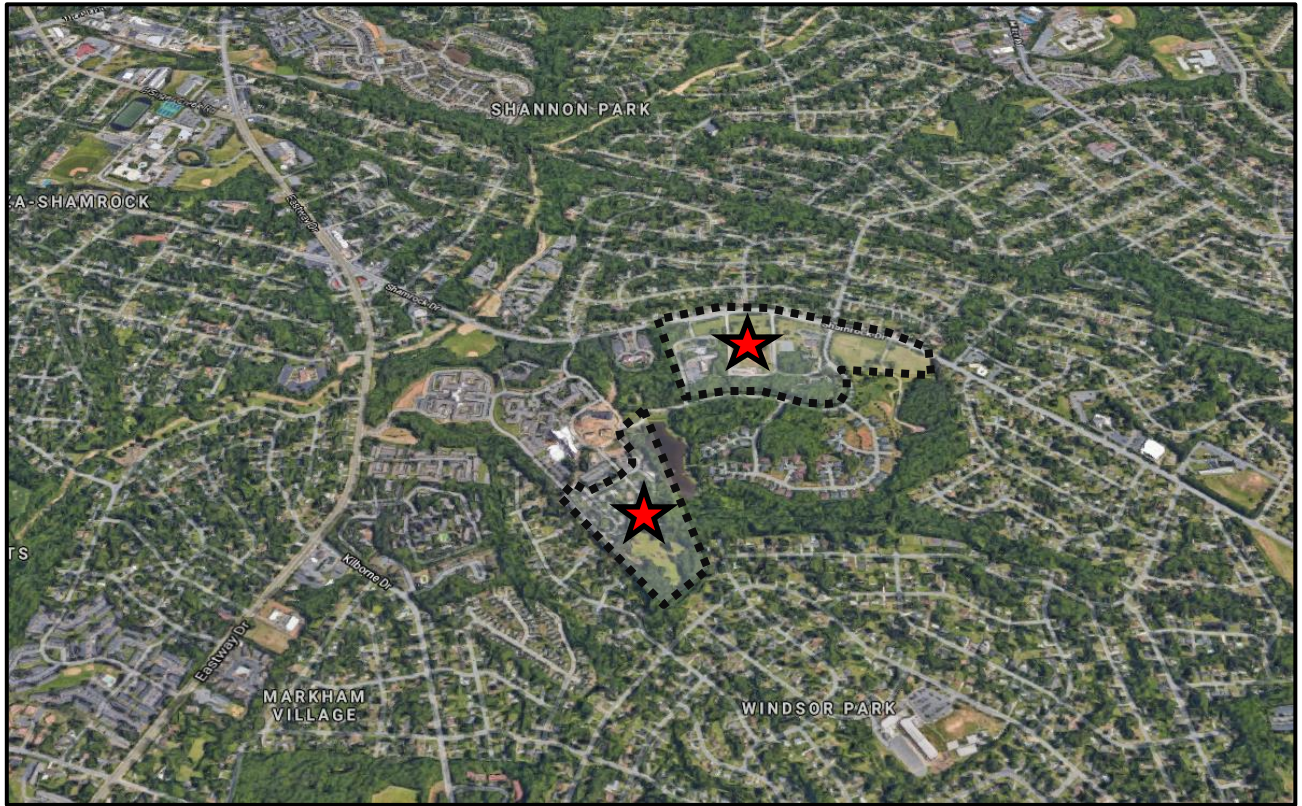
- Illustrates four development areas.
- Proposes up to up to 262 age restricted dwelling units; up to 380 residential dwelling units, up to 36,000 square feet of office, EDEE, retail, personal services and other similar commercial uses; up to 12,600 square feet of institutional and/or civic uses; up to 6,400 square feet of educational uses; group homes; accessory uses allowed in the UR-2 and MUDD district.
- Maximum building height of 75 feet.
- No limit to the number of buildings on site.
- Requests optional provisions for development areas 1 and 2 that include:
 - Internal streets and driveways to be treated as private driveways not required by the subdivision ordinance and as such parking shall be allowed between such driveways and buildings located within the MUDD-O zoned development areas 1 and 2.
 - Allowance of temporary surface parking on portions of the site without regard to location between buildings and streets/driveways provided the areas meet required standards beyond construction phasing of the project.
 - Not to require recessed doorways when the abutting sidewalk is greater than 10 feet in width
 - To allow balconies located above the first floor of the buildings to encroach up to four feet into the setback along public streets and outdoor dining canopies and awnings on buildings to encroach up to 10 feet into the setback along public streets subject to CDOT approval.
- Permitted uses and development area limitations that include:
 - Senior housing up to 262 independent age restricted dwelling units which may be located in any development area.
 - Up to 380 residential dwelling units which may be located in any development area.
 - Up to three group homes located within development areas 2 or 3. Group homes may be converted to up to 15 residential dwelling units in the same two areas.
 - Continuing care retirement community with associated units. Total number of units shall be based on the conversion of other units permitted at a one to one conversion rate and may be located within any development area.
 - Up to 18,000 SF of office uses with no more than 12,000 SF dedicated to medical office located within development area 2.
 - Up to 18,000 SF of retail, EDEE, personal services, and other non-residential uses permitted within development area 2.
 - Up to 12,600 SF of community center, institutional, civic, and/or indoor recreational uses located in development area 2.
 - Up to 6,400 SF of youth enrichment programming or similar institutional uses such as daycare, afterschool enrichment, etc. within any development area.
- Maintains conversion rights of retail/non-office commercial uses with office uses at a one-to-one ratio up to 7,000 SF. Also allows conversion of uses over time using a formula based on average daily trip ratios so long as no increase occurs from that conversion.
- Prohibits uses including accessory drive-thru windows, gas stations, tattoo or sweepstakes parlors, and other specific commercial uses.

- Proposes phased transportation improvements that are tied to specific development phasing/thresholds and are described below:
 - At Shamrock Drive and Eastway Drive – construction of separate northbound right turn lane on Eastway Drive with 200’ of storage or payment of equal value during phase 2 (2025).
 - At Shamrock Drive and Asbury Care Center Drive – removal of access in phase three (2030).
 - At Shamrock Drive and Foxford Place – one ingress lane and two egress lanes with 100’ of storage during phase 2 (2025).
 - At Shamrock Drive and Tipperary Place – install APS pushbuttons and ADA ramps at the intersection of Shamrock Drive and Willard Farrow Drive/Tipperary Place during phase 2 (2025); construct a northbound right turn land on Willard Farrow Drive with 100 feet of storage during phase 3 (2030).
 - At Shamrock Drive and Castlerock Drive – construct one ingress lane and two egress lanes with 50 feet of storage during phase 1 (2023).
 - At Shamrock Drive and N. Sharon Amity Road – install APS pushbuttons and ADA ramps at the intersection of Sharon Amity and Shamrock Drive during phase 2 (2025).
 - At Eastway Drive and Bishop Way Lane – install one ingress and two egress lanes with 100 feet of storage on Bishop Way Lane and construct a southbound left turn lane on Eastway Drive with 100 feet of storage during phase 3 (2030).

• **Existing Zoning and Land Use**



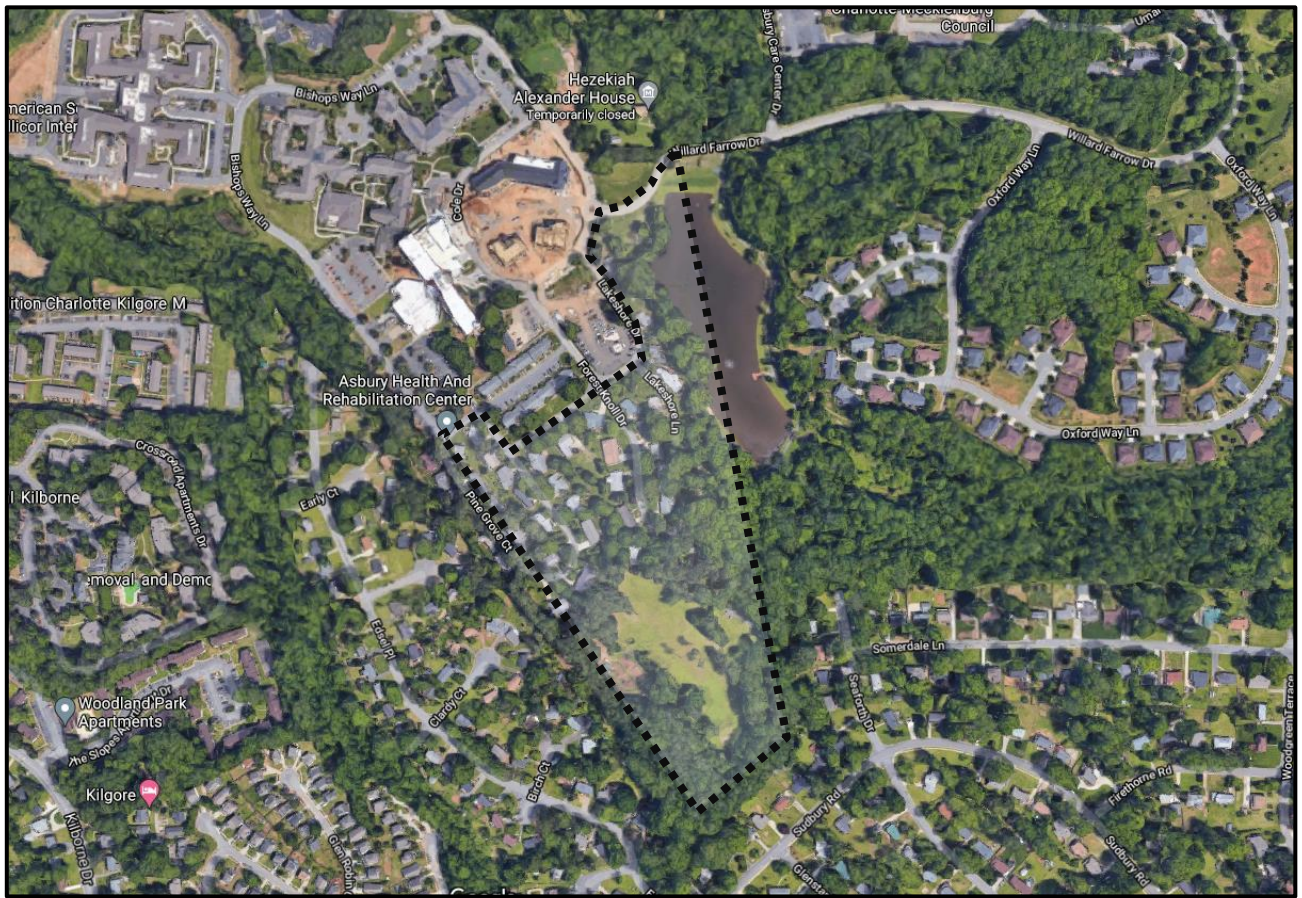
The portion of this rezoning boundary south of Lakeshore Drive was rezoned twice in the past 8 years (2014-067 and 2016-054), both site plan amendments addressing institutional uses within the Aldersgate community. The site is largely surrounded by detached single family homes and some multi-family dwelling units to the NE and SE of Bishop’s Way Lane.



General location of subject property denoted by dotted black outline.

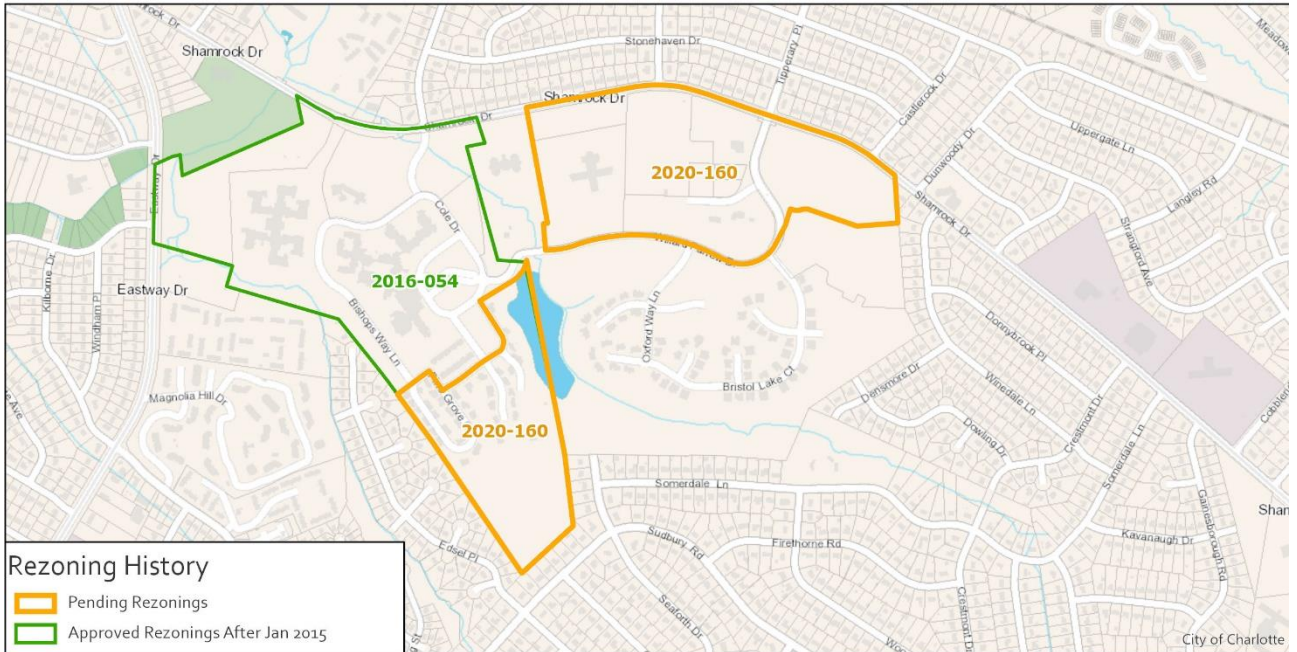


Looking east along Willard Farrow Drive toward the area of the rezoning boundary requesting MUDD_O



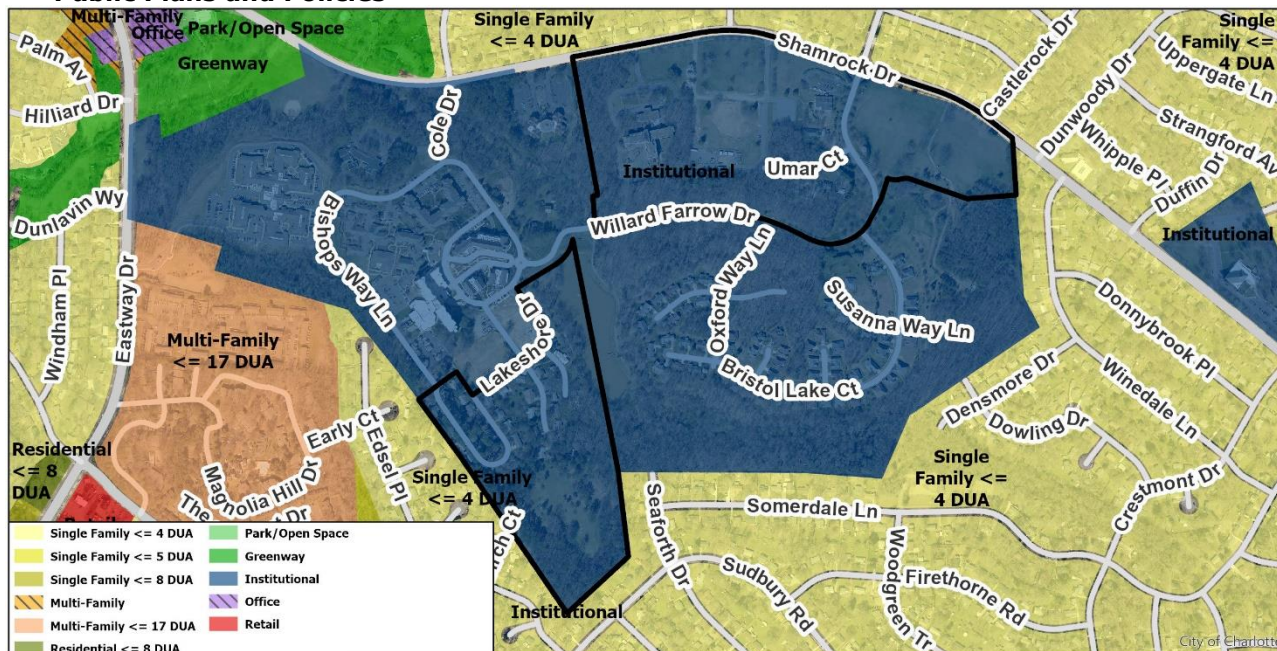
Portion requesting UR-2 (CD) district illustrated with dotted line. Streetview is not available for this portion of the site but sits above the Windsor Park neighborhood.

• **Rezoning History in Area**



| Petition Number | Summary of Petition | Status |
|-----------------|--|----------|
| 2016-054 | Site plan amendment for portion of Aldersgate community. | Approved |

• **Public Plans and Policies**



- The *Eastland Area Plan* (2003) recommends institutional uses for the site.
- **TRANSPORTATION SUMMARY**
 - The site is located on a City-maintained, major thoroughfare [Shamrock Drive], located approximately 1/2 mile southeast of the Eastway Drive/Shamrock Drive intersection. The proposed Aldersgate project is located on 70.417 acres and proposes four development areas with a mixture of land uses (as shown in the trip generation table below). The site plan commits to providing pedestrian connectivity and accessibility by providing six (6)-foot sidewalks through the site in accordance with the Charlotte WALKS Policy. A TIS was required for this site per the City’s Traffic Impact Study (TIS) Guideline’s thresholds. The Aldersgate Site IS was approved in May of 2021. The site plan commits to constructing all TIS recommended improvements. All outstanding CDOT issues have been successfully resolved.
 - **Active Projects:**
 - N/A
 - **Transportation Considerations**
 - No outstanding issues.
 - **Vehicle Trip Generation:**
 - Current Zoning:
 - Existing Use: 310 trips per day (based on 39 dwelling units; assisted living facility).
 - Entitlement: 5,550 trips per day (based on 739 dwelling units).
 - Proposed Zoning: 6,683 trips per day (based on multiple land use types).

DEPARTMENT COMMENTS (see full department reports online)

- **Charlotte Area Transit System:** See advisory comments at www.rezoning.org
- **Charlotte Department of Housing and Neighborhood Services:** No outstanding issues.
- **Charlotte Department of Solid Waste Services:** See advisory comments at www.rezoning.org
- **Charlotte Fire Department:** See advisory comments at www.rezoning.org
- **Charlotte-Mecklenburg Schools:** The development allowed under the existing zoning could generate 215 students, while the development allowed under the proposed zoning may produce 103 students. Therefore, the net decrease in the number of students generated from existing zoning to proposed is 112 students.
 - The proposed development is projected to increase the school utilization over existing condition (without mobile classroom units) as follows:
 - Windsor Park Elementary from 109% to 117%
 - Eastway Middle from 118% to 122%
 - Garinger High from 122% to 124%.

- **Charlotte Water:** Charlotte Water has accessible water system infrastructure for the rezoning boundary via an existing 8-inch water distribution main located along Shamrock Drive. The proposed rezoning has the potential to significantly impact the capacity of the local sanitary sewer collection system. Due to the limited project details that were provided, it is recommended that the applicant contact the Charlotte Water New Services Group for further information and to discuss options regarding sanitary sewer system capacity. See advisory comments at www.rezoning.org
- **City Arborist:** No comments submitted.
- **Erosion Control:** No outstanding issues.
- **Mecklenburg County Land Use and Environmental Services Agency:** See advisory comments at www.rezoning.org
- **Mecklenburg County Parks and Recreation Department:** No outstanding issues.
- **Stormwater Services Land Development Engineering:** No outstanding issues.
- **Storm Water Services:** See advisory comments at www.rezoning.org
- **Urban Forestry:** No outstanding issues.

OUTSTANDING ISSUES

Site and Building Design

1. ~~Staff does not support the optional provision that requests to not provide recessed doorways along sidewalks in Development Area's 1 and 2 for any sidewalk greater than 10 feet in width. Please remove from notes.~~ **ADDRESSED**

REQUESTED TECHNICAL REVISIONS

Transportation

2. ~~Revise site plan Note 1, 2025 Phase 2 Build Suggested Improvements, to state that "If U-5803 is funded at the time of permitting Phase 2, the petitioner shall construct a multi-modal improvement, subject to CDOT approval, along Eastway Drive or Shamrock Drive of equal value to the right turn lane."~~ **ADDRESSED**
 3. ~~Update Conditional Note 5.a. to reflect the accurate right-of-way for Shamrock Drive as 50 feet from centerline, matching the site plan, based upon an updated survey of the site.~~ **ADDRESSED**
-

See Attachments (applications, department memos, maps etc.) Online at www.rezoning.org

Planner: William Linville (704) 336-4090