



MEMO

Date: May 3, 2023
To: Public Input Session Participants
From: Trey Akers, Town of Davidson Project Manager
Re: Summit Farms Conditional Planning Area, Master Plan – Preliminary Staff Analysis

1. INTRODUCTION

APPLICANT INFO

- **Developer:** Summit Farms LLC
- **Owner:** Summit Farms LLC (Jason Ward, Project Director)
- **Site Designer:** Bolton & Menk (ColeJenest & Stone)
- **Location:** 19300 Shearer Rd. (Parcel IDs# 00723103, 00723121, 00723115, 00723116)
- **Area:** 57.64 Acres

SUMMARY

Summit Farms, LLC, proposes a mixed-use, Conditional Master Plan integrating commercial services, a variety of residential building types, and a working agrarian landscape on +/- 57.64 acres. The proposal includes several parcels originating at the southeastern corner of the intersection of East Rocky River and Shearer Roads, following the landscape south and east towards the Rocky River. The project straddles two planning areas: Neighborhood Services Overlay District (NSOD) and Neighborhood Edge (NE). The project is following the Conditional Planning Area process outlined in Davidson Planning Ordinance section 14.5.

2. PLANNING STAFF REVIEW – PRELIMINARY

*This review considers compliance with the Davidson Planning Ordinance (DPO) effective November 15, 2023, as amended. A copy of the site plan is included as **Attachment A**; full site plan documents are located on the project website, www.townofdavidson.org/summitfarms.*

PROCESS

SUMMARY

The project is following the Conditional Planning Area (Master Plan) process outlined in Davidson Planning Ordinance section 14.5. This is a legislative approval pathway that requires a Public Input Session, review by the Planning Board (i.e., an advisory board of residents), and technical reviews Town of Davidson as well as Mecklenburg County staff. Ultimately, it requires approval by the Davidson Board

of Commissioners. As part of the approval, conditions will be attached to the project to satisfy modifications to or request relief from select DPO criteria. An initial set of conditions are included as **Attachment C**. These will be updated as the project progresses through various reviews/meetings.

If the Conditional Master Plan receives approval from the Board of Commissioners, the commercial and residential buildings included in the project's mixed-use component will also require approval by the Davidson Design Review Board (DPO 14.9). This is an advisory board that reviews building architecture and design. The design review process is distinct from the Conditional Master Plan approval.

CONTEXT

The proposal comprises multiple parcels totaling 57.64-acres beginning at and lying to the southeast of the East Rocky River Rd. and Shearer Rd. intersection. The area is a mix of rural and developed lands. The project's immediate context includes a large residential subdivision to the west; undeveloped floodplain to the east, through which runs the Rocky River/Cabarrus County line; and individual single-family residences to the north and south ranging from about 1.0 – 6.0 acres or more. The proposed development of the site, which contains historical farm structures and landscape features, reflects the slow transition of the area from predominantly rural/agricultural uses to residential uses. The proposal provides one version of what the Rural Area Plan envisioned as a "rural crossroads mixed-use center," with a working agricultural landscape integrated into the development (Rural Area Plan, Pgs. 74-75).

PLANNING AND DEVELOPMENT STANDARDS

Below is a summary of general planning and development standards relating to this proposal.

LAND USES

There are two Planning Areas governing the parcels' development. The project's mixed-use node lies within the Neighborhood Services Overlay District (DPO 2.3.11), which the DPO describes as intended to "enhance the rural character of the Shearer Rd. – East Rocky River Rd. intersection as a rural crossroads with residential and commercial development." It goes on to note that the Neighborhood Services Planning Areas aim "to create small nodes within or near residential development that increase walkability, create a sense of place, and provide a concentration of goods and services for the daily needs and activities of nearby residents." The uses proposed in this node include: A coffee shop + roastery, a brewery, a restaurant affiliated with the agricultural operation, and an inn. The first three uses are permitted in the NSOD, while the inn is a requested condition of approval.

To the east, south, and southeast of the mixed-use node lie the project's agricultural (mainly south) and residential (east, southeast) components. These lands are designated as Neighborhood Edge Planning Area (DPO 2.2.11). The ordinance describes this Planning Area as a "transition between Davidson's urban areas and its rural periphery. Development in this planning area is low-density residential consisting primarily of single-family homes." The uses proposed throughout these areas include: Retail, residential, and agricultural. Although designed as part of the mixed-use node, Building #4 contains a retail component and is technically not a permitted use in NEPA. As described below, the building types associated with some of the proposed residential uses (multi-family, attached house) are not permitted in NEPA.

BUILDING TYPES + HOUSING

NEPA standards include a required mix of building types: No more than 90 percent of the units in each new development shall be single-family residential Detached House building type and no more than 30 percent of the units in each new development shall be duplex Detached House or Attached House

building types (2.2.11.C). At the “rural crossroads” NSOD also proposes very specific requirements for the building types it allows, with buildings lying close to the intersection required to have ground-floor commercial uses (Table 2-67) and be designed “to resemble vernacular rural landscapes” consistent with the “adaptive re-use of farmhouses (new or historic) and other similarly residentially-scaled structures” (Rural Area Plan, Pgs. 74-75, 90).

Looking at the project as a whole, the proposal includes 93 residential units: 38 attached units and 55 detached units. The attached units are included in Building #4, a mixed-use retail/residential Multi-family building type; two Attached Houses, multi-unit buildings designed to look like a Detached House while accommodating three or four distinct units within one building; and a farmhouse that may house two or more residential units for agricultural employees. The remaining units will be single-family Detached House building types, with Lot 55 being an outlier and the only residential home along Shearer Road. The project meets neither the unit mix (2.2.11.C) or lot diversity standards (2.2.11.E) but in each case exceeds the DPO’s intent by providing a greater variety of residential units and smaller lot designs; all setback requirements meet DPO standards for NEPA or the Rural Planning Area. At this point in the process, the project team has also expressed a desire to meet the DPO’s affordable housing requirement through on-site construction totaling 12 units. The project team has met with staff and stakeholders multiple times in 2023 to understand the community’s needs. Ideally, units would be dispersed throughout the entire development although allocations and location have yet to be determined.

At the mixed-use node, the project proposes 62,000 square feet of commercial development across +/- 2.25 acres. This includes a 40-room inn with units spanning two buildings. Approval of the physical design of the commercial structures lies with the Design Review Board and would occur only if/after the Master Plan is approved. The project has put forward a number of smaller-scale, two-story buildings intended to evoke rural elements while meeting the specified height (two stories minimum, three stories maximum) and setback requirements. And, as noted previously, careful thought has been given to the transitions within this node as well as between it and the agricultural/residential areas. This includes existing residential areas, too – based on feedback received the project shifted some of the focus inward along Public Street A to help mitigate noise and create a stronger sense of place internal to the project. Like Davidson’s Circles at 30 mixed-use area adjacent to I-77, the proposal is built on the same principles as downtown Davidson but reflects contemporary development considerations and realities (i.e., mobility/circulation, building design/floor heights, financing requirements, etc.). By way of comparison, the 62,000 square feet proposed in this project is roughly of the same gross size and building proportions as the following well-known downtown structures:

- CVS: 27,000 SF
- Summit Coffee: 3,400 SF
- Kindred: 3,600 SF
- Davidson College Bookstore: 7,600 SF
- Davidson Village Inn: 12,300 SF
- Knox Building: 8,300 SF

Overall, the intentional layout of buildings in each area – often utilizing existing topography, minimizing grading, and preserving agricultural land – meets the intent to mitigate impacts to sensitive natural features while concentrating walkable, mixed-use development at a pedestrian scale (2.2.11, 2.3.11.A). Although the project’s various approaches to building type, unit mix, and lot designs necessitate conditions of approval, the overall strategy warrants support for meeting the Planning Ordinance’s and Rural Area Plan’s intent.

TRANSPORTATION: IMPACT ANALYSIS & MOBILITY IMPROVEMENTS

The project exceeds 50 residential units/10,000 square feet of commercial building area and therefore automatically triggered the Planning Ordinance's requirement to conduct a Transportation Impact Analysis (TIA). Conducted by a third-party engineering consultant retained by the Town of Davidson, this consists of vehicular traffic counts and intersection analyses of the surrounding roads, along with evaluation of planned transportation projects and policy documents. It also considers impacts and improvements to multi-modal facilities for pedestrian and bicycles. The draft analysis is included as **Attachment B**. Overall the analysis anticipates minimal impact on the area's road network. Its recommendations include:

- East Rocky River Rd./Shearer Rd. Intersection:
 - Convert the intersection to all-way stop control.
 - Install high-visibility crosswalk on south leg.
 - Install standard crosswalk on north, west, and east legs
 - Construct curb ramps in all four quadrants
 - Install "dragon's tooth" markings on eastbound and westbound approaches of East Rocky River Rd.
 - Install "stop ahead" warning signs on eastbound and westbound approaches of East Rocky River Rd.
- Multi-use Paths:
 - Install a minimum 10' side path on the south side of East Rocky River Rd between the terminus of the West Branch Rocky River Greenway (approximately 700 feet west of Winged Oak Way) and Site Driveway 1
 - Install a minimum 10' side path along the east side of Shearer Road from East Rocky River Rd to approximately 850 feet south of Site Driveway 2.

As indicated above, the recommendations focus on improving the area's overall mobility options. The improvements address existing conditions (i.e., vehicular conflicts at the East Rocky River Rd./Shearer Rd. intersection) as well as future needs (i.e., the provision of adequate bicycle and pedestrian facilities from existing development to the envisioned walkable, mixed-use center). The project team and staff are continuing to evaluate the draft TIA recommendations and discuss different options to ensure the TIA- and ordinance-required improvements reflect both short- and long-term aims.

There remain some points of agreement but a number of outstanding issues remain. Agreement exists on the importance of connecting the site externally via a multi-use sidepath along East Rocky River Rd. to the existing West Branch Rocky River Greenway. This would link existing developments (River Run, Narrow Passage) to the proposed development via a safe, accessible path for pedestrians and cyclists of all ages. There is likewise consensus that – in order to maintain a rural feel and minimize rainwater runoff in the residential/agricultural areas – alternative street sections that do not include curb/gutter or standard sidewalks may be needed. In response to these needs the current proposal provides a series of all-weather, ADA-accessible paths that connect these areas to the mixed-use node.

Disagreement remains regarding the extent of multi-use path facilities along Shearer Rd. and the Rocky River. In the former the project team cites runoff from the sidepath as a hazard to maintaining the agricultural lands' biological integrity; in the latter provision of a greenway all the way to the property line is proposed only once a connection is made. Each of these goes against standard DPO requirements to provide facilities all the way to the property line. Each warrants careful evaluation in the months

ahead by the project team, staff, the Board of Commissioners, and stakeholders. Additionally, going forward the project team must provide further details concerning the durability of the alternative street and path surfaces proposed. Staff has asked for details for many months and has yet to receive any substantial information; the project team has acknowledged this need.

Lastly, the plan proposes parking arrangements in line with ordinance Table 8-1. The proposed 204 commercial spaces include 180 within parking lots and 24 on-street spaces within the mixed-use node. The proposed amount falls within the range permitted and exceeds the minimum required by about 22 percent (45 spaces). Of note, the project intends to provide four electric vehicle charging stations. This exceeds the minimum required by two.

NATURAL ASSETS: OPEN SPACE/PARKS & TREES

The site's existing conditions afford a variety of natural landscapes and experiences. The Environmental Inventory, Soils Map, and Tree Survey go into greater detail on topics such as topography, floodplains, soils, and historical/cultural resources. The plan makes an effort to incorporate a number of existing features such as existing agricultural lands, views, and a barn structure. As noted earlier, existing natural features significantly influenced the project team's selection of building and infrastructure locations. Notwithstanding the overall site design ethos, the project proposes more than half (31) of the 55 Detached House residential lots as well as rainwater management facilities within the 600-foot upland buffer area adjacent to the Rocky River – including lots and facilities within floodplain and water quality buffers. Rainwater management facilities are permitted in these areas; however, primary and accessory residential structures are not. These features will need to be carefully evaluated as the design progresses.

At a minimum the Neighborhood Edge Planning Area requires 45 percent open space, preservation of 40 percent of the site's existing mature tree canopy, and at least 50 percent tree canopy coverage at project build-out. Neighborhood Services requires 5 percent open space, 10 percent preservation, and 15 percent canopy coverage at build-out. Based on the calculations provided the project as a whole exceeds the open space requirements of 25.04 acres required (29.12 acres/50.5 percent are provided), including the minimum park requirements (1.25 acres/5 percent required, 2.19 acres/8.75 percent provided across two locations).

Baseline information has been provided concerning the existing tree canopy and preservation requirements; however, the information appears to indicate that a substantial amount of the preservation and future canopy will occur on private lots. Additionally, it appears that more than 50 percent of the preserved canopy has been included in the overall canopy calculations, which is not permitted. Revisions will be required and the updated information will be evaluated at the next technical review.

WATER QUALITY

As mentioned above, the plan proposes site features within some buffer and floodplain areas. The site does not lie within a critical watershed area but is subject to the Post-Construction Stormwater Ordinance, which regulates the treatment of rainwater on a site after construction is complete. For this project, it must provide adequate engineered stormwater measures in accordance with DPO 20.3.4.B because it exceeds 10 percent impervious coverage (i.e., built-upon-area or "BUA"). In meeting these requirements, the project proposes four facilities ("BMPs") to capture and treat stormwater. The DPO strongly encourages – and in some cases requires – a distributed approach to rainwater management and/or utilizing low-impact development techniques. These facilities will be reviewed in greater detail as part of future technical reviews.

ADDITIONAL CONSIDERATIONS

Three additional topics relevant to this site’s development have been identified and are introduced below.

UTILITIES: WATER/SEWER EXTENSION

Charlotte Water’s determination form classifies the project as an “Extension” because the project will take its utility access from outside the project site. Therefore, the project requires approval by the Board of Commissioners to extend water and sewer utilities to the site. This request will occur as part of the Conditional Master Plan, if approved. Note: Given Charlotte Water’s current capacity limitations, a willingness to serve letter for the utilities has not been granted by the provider.

As of March 14, 2023 projects located outside of town limits and requiring water/sewer extension are subject to the town’s Utility Service & Annexation Criteria Policy (“USAC”). This policy evaluates requests across number of metrics ranging from location and consistency with adopted plans to site design and sustainability features. Although not subject to the policy because the Summit Farms application was filed in January 2023, the project team elected to review the criteria and identify ways in which their project could fulfill the policy’s aims – particularly through a sustainability lens. Based on their evaluation the project team projects achieving 66 percent of the points available, which exceeds the 65 percent passing threshold set by the USAC policy to achieve an administrative approval.

FISCAL IMPACTS

In order to assess potential fiscal impacts, Economic Development staff conducted an analysis using the town’s fiscal impact analysis. The analysis identified the proposed development as aligning with the “Mixed-use” commercial prototype and “Low-density” residential prototype in the town’s 2020 Cost of Land Use Fiscal Impact Analysis. The analysis anticipates annual revenue for the development to be \$350,088.00, with costs to serve the development of \$199,660.00 – leaving a \$150,428.00 annual net gain. Therefore, this analysis anticipates the development covering its own costs and being able to generate positive revenue for the town to use in other areas – infrastructure, parks, services, etc. This metric, while valuable as a snapshot of fiscal impacts, should not be understood as a complete economic impact analysis (i.e., job and service creation, visitor attraction, etc.).

SUSTAINABILITY

The project’s overarching agricultural/sustainability ethos has been touched on at various points throughout this analysis. Of particular note is the project’s intention to meet several sustainability metrics included in the aforementioned USAC. In addition to sustainability features that have been included in other projects (i.e., universal design/aging in place, use of native landscaping, electric vehicle charging stations), the project proposes features that represent innovative approaches to design/development in Davidson. These include: Energy-efficient building performance and roof design to reduce solar heat gain; mitigation of light pollution through exterior lighting design; and use of low-impact development facilities to manage rainwater.

3. Public Plans & Policies

Below is a list of town-adopted plans and a brief summary of each plan’s applicability to the proposed Summit Farms Conditional Planning Area – Master Plan:

- **Davidson’s General Planning Principles (2020)** include tenets to guide decisions and development in Davidson. Principles relevant to this proposed development are listed below. They can be

summarized as: Davidson should focus on walkable, interconnected places that reflect steward of our land resources.

- Character & Community: We must preserve Davidson’s character and sense of community.
 - Walkable neighborhoods and centers with community open space and parks that are integral parts of town
 - A street, sidewalk, and greenway network that knits the community together
 - Neighborhoods welcoming to all citizens
 - Balancing rural character protection with new opportunities to create special places and neighborhoods
- Mobility: We must provide a safe and efficient transportation network for all users by supporting active transportation, transit, and new mobility options. Development and redevelopment in walkable, mixed-use, connected neighborhoods.
 - New greenway, bike, and sidewalk connections to existing and new developments
 - Streets that are safe and accessible for all people — pedestrians, cyclists, and drivers
- Natural Assets: We must wisely manage the finite land and natural resources in the town’s planning area.
 - Stewardship of our land and natural resources and preserving significant hardwood forests, farmland and farming, wildlife habitats, rock outcroppings, parkland, watersheds, and rural views
 - Growth that occurs in appropriate locations that are most suitable for development and away from important open spaces
 - Opportunities for public access to active and passive recreational amenities in our preserved open space
 - Tree canopy that is preserved, enhanced, and established as new development and redevelopment occurs
- Diversity & Inclusivity: We must create an environment that maintains and enhances community diversity and inclusivity. We will encourage diversity of all economic levels, all races and ethnic groups, all ages, and all physical and mental abilities through:
 - A mixture of housing types and prices in neighborhoods that are designed to complement the existing architectural character
 - Affordable housing options and strategies to support new and existing residents
- Growth Management: We must manage growth and support appropriate economic development so the town can provide public facilities and services apace with development. It is our intent that all parts of a vibrant, successful community grow together through:
 - Decision-making based on the long-term goals of the comprehensive plan rather than a short-term benefit
 - A healthy diversity of uses in walkable neighborhoods
 - Alternative transportation options between destinations
- Placemaking: We must maintain Davidson’s unique sense of place through quality architecture and design. Livable environments include well-designed buildings, a dynamic public realm, and seamless connections between the two. This means that:
 - Davidson’s cultural heritage and historic resources will be actively preserved and maintained
 - The design of our public spaces, parks, and plazas will encourage social interaction, cultural experiences, and recreational opportunities

- Fiscal Health: We must consider the town’s fiscal health when making decisions. This means that:
 - Decision-making will encourage a fiscally-sustainable balance between the residential and commercial components of the town’s tax base
- The **Davidson Comprehensive Plan (2020)** establishes a wide-ranging set of goals for the community to pursue, many of which are listed below. The goals emphasize prioritizing development in designated growth areas; creating safe, interesting pedestrian areas and public spaces; integrating sustainable features into development projects; and ensuring contextually appropriate infill.
 - **Goal 2.1: Intentional Growth Management**
 - Policy 2.1.1, Manage Growth to Balance Protection of Community Character and Natural Areas While Directing Desired Growth to Identified Centers: Lands within the town’s current corporate limits are priorities for infill and redevelopment.
 - **Goal 2.2: A Network of Natural Areas & Open Space**
 - Policy 2.2.1: Protect Ecologically Valuable Areas and Corridors: Through regulations and development decisions, protect, restore, and connect ecologically valuable areas such as critical watersheds, stream buffers, wetlands, wildlife habitat, and hardwood forests. Additionally, prioritize conservation of similar lands adjacent to these areas.
 - Policy 2.2.2: Integrate Green Space Throughout the Built Environment: Being cognizant of the importance of green space to human health, continue to thread green space throughout the built environment by growing, enhancing, and protecting the urban tree canopy, and providing natural green public spaces, neighborhood gardens, and greenways. To the extent possible, encourage native landscaping.
 - Policy 2.2.3: Protect Active Farmland: Protect and support active farmland, recognizing the economic, environmental, and social importance of farmland protection and local foods production.
 - Policy 2.2.5: Protect Valued Rural Viewsheds: Recognizing Davidson’s rural history, as well as the present-day importance of rural viewsheds, protect those viewsheds deemed most important by the Davidson community.
 - Policy 2.2.6, Expand Use of Low Impact Development Techniques: Use low impact development systems and practices that use or mimic natural processes to protect water quality and associated aquatic habitat and reduce the impact of built areas. Examples may include, but are not limited to, rain gardens and bioswales that result in the infiltration, evapotranspiration or use of stormwater.
 - **Goal 2.3: A Sustainable Built Environment**
 - Policy 2.3.3, Ensure Best Design Practices in New Growth: New growth should include short blocks and connected rights-of-way, prominent civic spaces, protected natural areas, front-facing buildings, a diversity of housing types...rear parking and alleys, front porches, and safe multimodal travel options.
 - **Goal 2.4: A Preserved Historic Fabric**
 - Aspiration: Davidson will celebrate its unique architectural and cultural history through preservation initiatives and designing new buildings, spaces, and landscapes that complement the existing historic fabric and leave an inspiring building legacy.

- **Goal 2.5: Contextually-Sensitive Infill & Redevelopment**
 - Policy 2.5.2, Balance Incremental Change with Existing Character: As Davidson grows through infill development, redevelopment of existing sites, and new growth in appropriate places on the town’s edge, it should complement the town’s existing character.
- **Conservation & Growth Framework Map**
 - Districts, Neighborhood Services:
 - » Neighborhood Services nodes are intended to be small-scale and context-sensitive. These nodes could offer goods and services for the daily needs and activities of nearby residents. These nodes should also be unique places worth visiting from across town.
 - » Key Features:
 - Context-sensitive, walkable design that enhances adjacent neighborhoods and provides services and limited office space
 - Indoor and outdoor gathering spaces and places for activity on the sidewalk
 - » Opportunities:
 - Design standards that place the building along the sidewalk and parking on the street or behind the building; green building design
 - Vertical mix of uses with services and live-work units
 - Special attention to pedestrian and bicycle infrastructure
 - Satisfy some daily needs of adjacent residents
 - Districts, Residential Neighborhood Edge & Open Space:
 - » Residential Neighborhood Edge and Open Space areas are expected to accommodate new neighborhoods, while protecting large open space areas and corridors ranging from hardwood forests to rural landscapes. These neighborhoods should use traditional neighborhood design to enhance the natural and built environment of the town.
 - » Key Features:
 - Continued promotion of traditional neighborhood development patterns, walkability, and a variety of housing types and uses
 - Protection of priority conservation areas
 - Interconnectivity with existing town neighborhoods and extension of existing built fabric
 - » Opportunities:
 - Open space preservation and green space
 - Enhance cross-town street and trail connectivity
 - Low impact development and green building design
 - Integration of affordable housing
- **Goal 3.1 Safe Streets for All**
 - Policy 3.1.1, Promote Complete Streets Best Practices: Continue to encourage Complete Streets best practices in future projects.
 - Policy 3.1.3, Support Safe Bikeway Facilities: Support the construction of bikeway facilities that are physically protected and separated from automobile traffic as identified in the Mobility Plan.
 - Policy 3.1.4, Promote Traffic Calming Measures: Promote traffic calming measures on streets that experience unsafe vehicle speeds. Consider traffic calming tools in the Street Design Toolbox (page 67).
 - Policy 3.1.5, Promote Quality Pedestrian Crossings: Promote quality pedestrian and bicycle crossing treatments that are highly visible, predictable, and intuitive.

- Policy 3.1.5, Promote Quality Pedestrian Crossings: Promote quality pedestrian and bicycle crossing treatments that are highly visible, predictable, and intuitive [Marked Pedestrian Crossings]
- **Goal 3.3 Increase Travel Options**
 - Policy 3.3.1, Promote a Continuous Pedestrian Network: Support the extension of sidewalks, greenways, and sidepaths that contribute to a fully connected pedestrian network.
 - Policy 3.3.2, Expand Connected Bikeway Infrastructure: Support the expansion and integration of bikeway facilities within existing rights-of-way, in future roadway construction, and in separate paths. Promote protected bike lanes, boulevards, and side paths on arterial and collector roads over striped lanes and shared lane markings which do not provide adequate barriers between bicyclists and vehicular traffic.
 - Policy 3.3.4, Improve Street Connectivity: Promote street connectivity and short blocks that enhance walkability, slow traffic, provide two-way traffic, and ensure multiple access routes for emergency vehicles and other travelers.
- **Goal 5.1 Diverse & Inclusive Housing Options**
 - Policy 5.2.1, Foster a Diversity of Housing Options: Foster a diversity of well-integrated housing options within neighborhoods and along block faces, including but not limited to tenure (rental, ownership, cooperative), type (detached houses, townhouses, attached houses, appropriately- designed and scaled multi-family housing, and live-work units), and income.
 - Policy 5.2.6, Support Private Development of Affordable Housing: Continue to promote the construction of affordable housing in private development through incentives, regulations, and encouragement.
- **Goal 5.3 Long-Term Fiscal Health**
 - Policy 5.3.3, Promote Smart Growth: Encourage compact development that can be more efficiently served.
 - Policy 5.3.4, Consider Community Priorities and Long-Term Impacts: Consider community priorities and long-term impacts in decision-making, with the understanding that some community priorities may not have positive fiscal impacts and some decisions may not materialize in short-term benefits.
- The **Rural Area Plan (2016)** created a coherent land-use and transportation framework to guide development in the rural area for the next 20 to 30 years. It emphasizes the concentration of mixed-use centers surrounded by compact, walkable neighborhoods as a means of fostering high-quality development balanced with substantial open space preservation. It built upon the 2010 Davidson Comprehensive Plan’s Targeted Growth Plan concept and provided a basis for the 2020 Davidson Comprehensive Plan’s Conservation & Growth Framework. At numerous points it speaks directly to future development at the East Rocky River Rd./Shearer Rd. intersection.
 - **Rural Crossroads (Pgs. 74-75):**
 - A rural crossroads mixed-use center would be ideal at the intersection of East Rocky River and Shearer Roads to support the various neighborhoods in the vicinity and provide a walkable destination to residents. Typical rural commercial crossroads architecture often resembles the adaptive re-use of farmhouses (new or historic) and other similar residentially-scaled structures. Ideal tenants would include restaurants, small offices, a coffee shop, a general store, and other neighborhood services.

▫ **Action Item 7.6: Designate “Neighborhood Services” zones around the nodes at the Concord/Davidson-Concord Road and the East Rocky River Road/Shearer Road intersections (Pg. 90):**

- A second, smaller Neighborhood Services mixed-use center has also been identified at the intersection of East Rocky River Road and Shearer Road. While much of the surrounding development is not inherently walkable, the southeastern quadrant of that node is expected to be developed as a compact, walkable neighborhood, enough to support some small neighborhood-serving uses. In addition, the heavy bicycle traffic through this area is expected to provide additional non-motorized mobility options to this center.
- As depicted in the proposed Master Plan, commercial development at this node should resemble vernacular rural landscapes. While development should not be made to look old, new commercial construction should be in the style of large house/general stores in massing and architectural detail. Examples of such adaptations abound and illustrate how compatible designs can be realized. The Davidson Planning Ordinance should be modified to emphasize these standards for this particular intersection, which will help to clarify the design expectations for these structures.

4. STAFF RECOMMENDATION

The purpose of the Public Input Session Staff Analysis is to assess the preliminary sketch plan against existing standards, provide the public and stakeholders with the known facts, and offer direction on which topics should be further explored as the site design evolves. After reviewing the application and documentation, staff believes the following topics warrant further study:

- Affordable Housing: Continued engagement by the developer with the town and community stakeholders to provide on-site construction;
- Site Access/Mobility: Commitment by the developer to install the multi-use side path (Shearer Rd.) and greenway (Rocky River) as required by the DPO/TIA, and to understand the best long-term design solution for the East Rocky River Rd./Shearer Rd. intersection;
- Infrastructure: Provision of detailed information as requested by staff to understand the durability and maintenance features of the proposed alternative street/path surfaces;
- Trees: Revision of the tree calculations to reflect DPO requirements;
- Sustainability: Confirmation on the plan via notes about features to be included;

Based on feedback received at the Public Input Session, additional topics may be explored.

5. ATTACHMENTS/RESOURCES

ATTACHMENTS

- **Attachment A:** Preliminary Sketch Plan (i.e., Site Plan)
- **Attachment B:** Draft Transportation Impact Analysis (TIA)
- **Attachment C:** Draft Conditions of Approval

RESOURCES

- **Davidson Planning Ordinance:** [Planning Ordinance Website](#)

- **Project Documents:** Project Website (Environmental Inventory Report, TIA, Site Plans)
 - www.townofdavidson.org/summitfarms