

SUMMIT FARMS

Conditional Planning Area – Master Plan

Site Notes + Conditions

08.22.2023

INTRODUCTORY COMMENTS

All statements below are proposed for inclusion as part of the Conditional Planning Area – Master Plan. They are based on ordinance requirements, staff review, precedents, and relevant plans/policies. References to applicable notes’/conditions’ origin are included. See the [Davidson Comprehensive Plan](#) and [Mobility Plan](#) for Policy/Action Item or Action Step references (i.e., abbreviated CP P 2.2.6, A 5.2.7 or MP AS 2.5).

GENERAL PROVISIONS (CP-203)

- 1. Purpose:** The purpose of the Conditional Planning Area – Master Plan application is to allow modifications to specific Davidson Planning Ordinance (DPO) requirements for the underlying Neighborhood Services Overlay District (NSOD), Neighborhood Services Planning Area (NSPA), and Neighborhood Edge Planning Area (NEPA) and other DPO provisions in effect on the application acceptance date (February 14, 2023). The site plan, associated notes, and provisions are conditions of approval and based upon the Davidson Planning Ordinance, adopted plans, and policies. Unless otherwise specified, the ordinance in effect on the date of application acceptance shall control (i.e., the DPO adopted November 15, 2022).
- 2. Modifications:** The site configurations and placements (including but not limited to access points, lot sizes, parking layouts, and open spaces) are schematic in nature and may be altered and/or modified during the Site Construction Document process in accordance with ordinance requirements and Planning Director approval.
- 3. Phasing:** The developer shall be permitted to complete the project in three phases: Commercial, Farm, and Residential. The Commercial or Farm component may be the first phase; the Residential component shall not precede the Commercial component. For each phase, all improvements required in the Transportation Impact Analysis (TIA) approval letter, all utilities and grading, and all ordinance-required infrastructure/improvements must be installed prior to the first Certificate of Occupancy being issued for that phase. NCDOT-required improvements may be phased according to project requirements, subject to Planning Director approval.
- 4. Utilities:** This approval shall serve as the Board of Commissioners’ approval of the project’s required water and sewer extensions. All required CLT Water documents, including an approved Capacity Assurance Letter, must be provided for Construction Document approval.

5. **Subdivision/Conveyance:** The site may be subdivided to create rights-of-way, open spaces, and easement access areas. All rights-of-way shall be conveyed prior to the first Certificate of Occupancy being issued for each component depending on project phasing (i.e., first commercial building or first residential unit).
6. **Floodplain Improvements (DPO 18):** The Master Plan will comply with the standards set forth in DPO Section 18. Variances shall be approved as provided for in the ordinance.

CONDITIONS (CP-203)

1. **Planning Areas (DPO 2):** The Master Plan will comply with the standards set forth in DPO Section 2 for the NSOD, NSPA, and NEPA and requests the following exceptions:
 - a. **Permitted Uses:** The following uses shall per permitted as depicted on the plan:
 - i. Inn/Hotel (DPO Tables 2-32, 2-40, 2-67)
 - ii. Restaurant (DPO Table 2-40)
 - iii. Farm, Agricultural & Product Sales (DPO Table 2-40)
 - b. **Building Types:** The following building types shall per permitted as depicted on the plan and shall meet all applicable ordinance design requirements:
 - i. Attached House (DPO Tables 2-33, 2-67)
 - ii. Storefront (DPO Table 2-41)
 - c. **Lot Variation/Unit Allocation:** The following lot variation and unit allocations shall be permitted as depicted on the plan:
 - i. Lot Variation: Four different lot sizes shall be permitted for the 55 single-family lots, with the 75-foot and 105-foot lot classes permitted to comprise less than the minimum 20 percent required (DPO 2.2.11.E.A).
 - ii. Unit Allocation: The percentage of attached units (Single-Family Detached – Duplex, Attached House, and Multi-family) shall be permitted to exceed 30 percent of the total unit count but shall not exceed 50 percent of the total unit count (DPO 2.2.11.C).
 - d. **Setbacks:** The following setbacks shall be permitted for Lots 10-13, 40-52, as depicted on the plan:
 - i. Front Setback: 25 feet
 - ii. Side Setback: 15 feet
2. **Design Standards (DPO 4):** The Master Plan will comply with the standards set forth in DPO Section 4 and requests the following exceptions:
 - a. **Porte Cochere:** A porte cochere shall be permitted on the front of Building #3/Inn in the configuration shown along Public Street A (DPO 4.3.1.A.5).
 - b. **Summit Coffee/Corner Building:** The commercial building at the southeastern corner of the Shearer Rd./East Rocky River Rd. intersection shall not be subject to the design parameters of DPO 4.4.1.B.3 and shall be in substantial conformance with the form and massing presented, subject to Design Review Board approval.

- c. **Retaining Walls:** In the locations specified on the plan, walls shall be permitted according to the following:
 - i. **Street-Facing:** Walls may exceed three (3) feet in height when forward of the front building line and must be tiered per DPO requirements if exceeding six (6) feet in height (DPO 4.3.1.D.1). Street-facing walls, including tiered levels, shall not exceed six feet in height per tier. Walls immediately adjacent to the right-of-way shall feature art or landscape components along the wall to mitigate the wall's impact.
 - ii. **Other Walls:** Walls not facing a public street may exceed 6 feet in height and must be tiered per DPO requirements if exceeding 20 feet in height (DPO 4.3.1.D.3).
 - d. **Loading/Service Areas, Mechanical Equipment and Utilities:** In the locations specified on the plan loading facilities, loading docks, and service areas shall be permitted to be located along the primary street-facing facade (DPO 4.3.1.E.1). All screening requirements for these facilities shall be met.
- 3. Housing:**
- a. **Universal Design:**
 - Amount: 25 percent of the residential units (27 units) shall be designed according to the specifications derived from ICC A117.1, Type C, VISIBLE Unit and LEED for Neighborhood Development v4 VISITABILITY & UNIVERSAL DESIGN Options 1-3 principles.
 - Features: Dwelling units shall include at least six features from Options 1-3 and at least one feature from each Option. [CP P 5.2.4/A 5.2.7]
 - Allocation: No more than ninety percent of the universal units shall be located in the Multi-family building; at least three units shall be located in the Attached House/Quadplex building type; at least two of the units shall meet DPO affordable housing requirements; and at least two of the units shall be located on the first/ground floor of the Multi-family building type.
 - b. **Affordable Housing:** The applicant shall meet the affordable housing requirement by constructing 12 affordable residential units on site according to the Affordable Housing Plan (AHP). While the parameters of the AHP may be modified administratively based upon mutual agreement by the applicant and town staff, the overall unit count shall not be changed.
 - c. **Design:** With the exception of single-family Detached House units, all buildings shall require Design Review Board approval. This includes Detached House – Duplex, if included.
 - d. **Energy Efficiency:** All Detached House and Attached House residential buildings shall comply with the NC Residential Energy Rating Index based on the applicable climate zone (3A) and achieve a maximum HERS score of 55.
- 4. Subdivision & Infrastructure Standards (DPO 6):** The Master Plan will comply with the standards set forth in DPO Section 6 as listed below and requests the following exceptions:
- a. **TIA-Required Improvements (DPO 6.10.4):** Vehicular and pedestrian improvements shall be constructed as required by the approved Transportation Impact Analysis.

- b. **Surface Materials (DPO 6.2.4):** The following alternative surface materials shall be permitted as depicted on the plan:
 - i. Chip & Seal Top Coat Treatment: Public Street B beginning south of the intersection with Public Street A; Residential alleys.
 - ii. Maintenance: The Town of Davidson agrees to maintain all public streets, including alleys. The existing gravel drive/fire access shall be improved and maintained by the Homeowner's Association to meet fire code access requirements.
 - c. **Connections (DPO 6.5.1):** The following alternative features shall be permitted as depicted on the plan:
 - i. Block Length: Select residential block lengths shall exceed 600 feet (6.5.1.B).
 - ii. Close: A close in lieu of street stub to southern property boundary (6.5.1.E).
 - iii. Alley Stub: Alley stub behind Lot 35 (6.5.1.H.7).
 - d. **Street Type (DPO 6.7.3):** As depicted on the plan, the Rural Road cross-section shall be permitted within the NEPA/residential component of the Master Plan.
 - e. **Pedestrian Connections/Multi-Use Paths (DPO 6.5.3, 6.8):** The following alternative compliance approaches or surface materials shall be permitted as depicted on the plan:
 - i. Connections: Pedestrian connections may exceed 300 feet (6.5.3). On-site multi-use path connections shall be in substantial conformance to ordinance requirements (6.8.3.D).
 - ii. Surface Materials: Multi-use paths and the southern connector between Lots 47-48 shall be constructed to DPO standards and maintained by the Town of Davidson. All-weather aggregate surface may be utilized for paths located: Along the northern boundary; in the middle of the development; along Public Street B; and connecting to the Event Barn. With the exception of the connection between Lots 13 and 40, paths shall be ADA-compliant. All paths shall be publicly-accessible and maintained by the developer or HOA, with the northern boundary path requiring a 20' public access easement. (DPO 6.8.1.I, 6.8.3.C).
 - iii. Easements: Easements for future multi-use path and/or street path facilities shall be provided: Along the frontage of Lot 55 and Lots 48-51; along the Rocky River behind Lots 48-51.
 - iv. Payment-in-Lieu: The project shall provide a payment-in-lieu of \$3,372.50 for required multi-use path facilities not provided along Shearer Rd. in front of Lot 55.
5. **Parks & Open Space (DPO 7):** The Master Plan will comply with the standards set forth in DPO Section 7 as listed below and requests the following exceptions:
- a. **Neighborhood Park (DPO 7.4.2.):** The Neighborhood Park shall be satisfied via two non-contiguous locations as depicted on the plan:
 - i. Tot Lot: Shall provide an active recreational component (i.e., playground) and shall be permitted to be less than the minimum 0.5-acre size requirement.
 - ii. Linear Nature Walk: Shall provide an active recreational component (i.e., trail) and shall exceed the minimum 0.5-acre size requirement.

6. **Parking & Driveways (DPO 8):** The Master Plan will comply with the standards set forth in DPO Section 8 as listed below and requests the following exceptions:
 - a. **Location (8.4.1.B):** The northernmost parking area along Public Street A is permitted to be located in front of the Multi-family/retail Building #4 façade and must be screened in accordance with DPO 9.6.2.D.
 - b. **Size (DPO 8.4.1.C):** Portions of the main/mixed-use component parking lot shall be permitted to exceed 36 spaces without requiring landscape features as depicted on the plan.
 - c. **Surface Materials (DPO 8.4.1.M):** The following alternative surface materials shall be permitted as depicted on the plan:
 - i. Chip & Seal Top Coat Treatment: Attached House parking lot.
 - ii. Aggregate All-weather Material: Main/mixed-use, event building, and farm operations parking lots.
 - d. **Screening (DPO 8.4.4/9.6.2.E):** The Attached House buildings shall not require screening from the adjacent parking lot per the DPO but shall be screened by existing and new vegetation as generally shown on CP-705 Landscape Schematic Design.
 - e. **Rainwater Management (DPO 8.4.8.B, 20.3.3-4.B.2):** The Master Plan shall achieve the following (low-impact development shall be as defined in the town's adopted Utility Service & Annexation Criteria Policy): The project shall convey all rainwater generated by surface parking areas to low-impact development treatment facilities.
7. **Tree Canopy & Landscaping (DPO 9):** The Master Plan will comply with the standards set forth in DPO Section 9. Additionally:
 - a. **Trees (DPO 9.3.1-2):** Based on the project scope including pastureland, the project shall meet modified thresholds for preservation and canopy coverage. The project shall preserve a minimum of 28 percent of the existing canopy, including specimen trees as identified on the plan, and achieve a minimum canopy coverage of 45 percent at project buildout.
 - b. **Vegetation:** The project shall plant a minimum of six species of vegetation that are native or adapted to the project's EPA Level III Ecoregion, including a minimum of two out of the following plant categories: Tree, shrub, and ground cover.
 - c. **Pollinator Species:** The project shall designate a portion of the site common open space area for a pollinator garden consisting of native flowering plants equivalent to at least 30 square feet per residential unit. [CP P 2.2.2]
 - d. **Installation:** Required landscape improvements for each phase shall be installed prior to 50 percent of the Certificate of Occupancies for each phase being issued.
8. **Lighting (DPO 10):** All lighting installed in the right-of-way, common open space areas, and on building exteriors shall meet or exceed the back-uplight-glare (BUG) or calculation methods specified in LEED v4.1 Sustainable Sites Light Pollution Reduction. Street light location in the residential component shall be permitted to meet the Rural Planning Area standard in DPO 10.5.2.B Location. [CP P 2.3.2/A 2.3.3, 2.3.7]

9. Public Safety:

- a. Signage/Addressing:** Buildings shall be adequately addressed from the access street and individual unit numbers labeled on the exterior and interior of the Multi-family and Attached buildings. Alley-served units will be addressed on the alley as well as the front of the building.
- b. Access:** The project shall provide a Knox Box for access by Fire Dept. personnel in the event of an emergency in all non-single-family residential buildings. The project shall provide a code and/or key fob for access to the building interior and parking structure by Police Dept. personnel in the event of an emergency. If a code is used it must not be changed unless a security breach occurs, and an updated code must be shared with the Police Department. If a key fob is used then a fob must be provided for each patrol car.