



**TOWN OF DAVIDSON  
BOARD OF COMMISSIONERS  
Town Hall Board Room - 216 S. Main Street**

**March 14, 2017**

**WORK SESSION - 4:00 PM**

(Held in the Town Hall Meeting Room)

- (a) Affordable Housing Needs Assessment Final Report by UNCC UI -  
Town Attorney/Affordable Housing Manager Cindy Reid

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**REGULAR BOARD OF COMMISSIONERS MEETING - 6:00 PM**

(Held in the Town Hall Meeting Room)

**I. CALL TO ORDER**

**II. ANNOUNCEMENTS**

- (a) Arbor Day Proclamation

**III. PRESENTATIONS**

Community School of Davidson Rain Art Display

**IV. PUBLIC COMMENTS**

**V. CONSENT**

- (a) Approve First Tuesday Minutes from February 7, 2017  
Approve Second Tuesday Agenda Minutes from February 14, 2017  
Approve Coffee Chat Minutes from February 20, 2017  
Approve Fourth Tuesday Agenda Minutes from February 27, 2017

- (b) Approve Tax Levy Adjustment

**VI. NEW BUSINESS**

- (a) Consider Approval of Budget Amendment BA2017-14 - Finance Director  
Piet Swart
- (b) Consider Approval of Resolution 2017-10 - Opposing House Bill 64

**VII. OLD BUSINESS**

- (a) Beaty Street Proposal and Public Comment - Assistant Town Manager  
Dawn Blobaum
- (b) Consider Approval of Resolution 2017-07 - Annexation: 321 Catawba - Set  
the Public Hearing Date - Town Clerk Carmen Clemsic
- (c) Consider Approval of Resolution 2017-08 - Annexation: Westbranch - Set  
the Public Hearing Date - Town Clerk Carmen Clemsic
- (d) Consider Approval of Resolution 2017-09 Bailey Springs Affordable  
Housing - Town Attorney/Affordable Housing Manager Cindy Reid

**VIII. SUMMARIZE MEETING ACTION ITEMS**

**IX. ADJOURN**



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**Agenda Title:** Affordable Housing Needs Assessment Final Report by UNCC UI - Town Attorney/Affordable Housing Manager Cindy Reid

**Summary:** The Affordable Housing Needs Assessment report conducted by the University of North Carolina Charlotte, Urban Institute.

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**ATTACHMENTS:**

<b>Description</b>	<b>Upload Date</b>	<b>Type</b>
<input type="checkbox"/> Affordable Housing Presentation	3/14/2017	Presentation
<input type="checkbox"/> Next Steps AFH	3/14/2017	Cover Memo
<input type="checkbox"/> Affordable Housing Report	3/13/2017	Presentation





# TOWN OF DAVIDSON

## Housing Needs Assessment



# Guiding Questions



1. What is the Town's current housing inventory and what are the emerging needs based on demographic shifts?



2. Who works in Davidson but can't afford to live there?

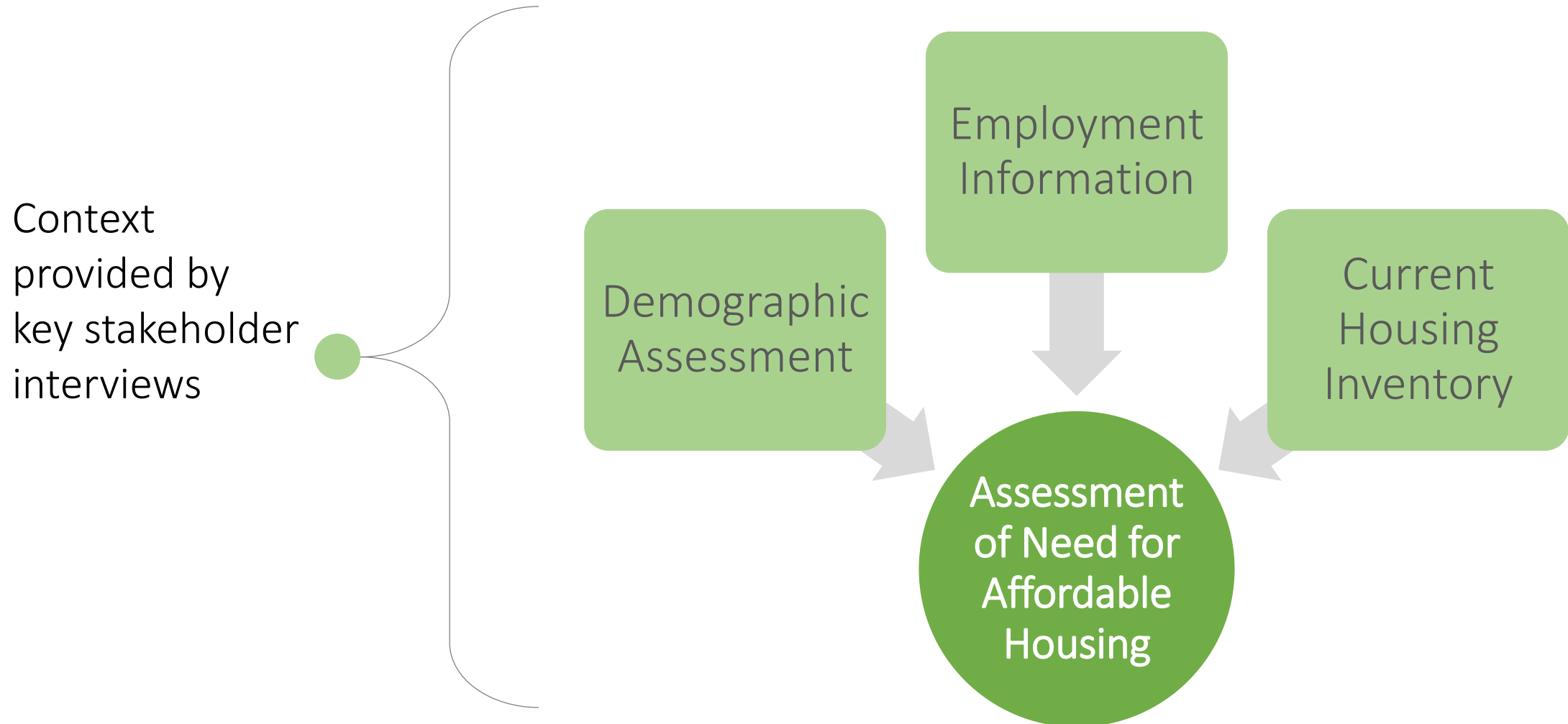


3. What are the housing needs in Davidson along a spectrum of affordability?



4. What are the complexities and context of developing affordable housing in Davidson?

# Project Overview





Current housing inventory and emerging needs based on demographic shifts

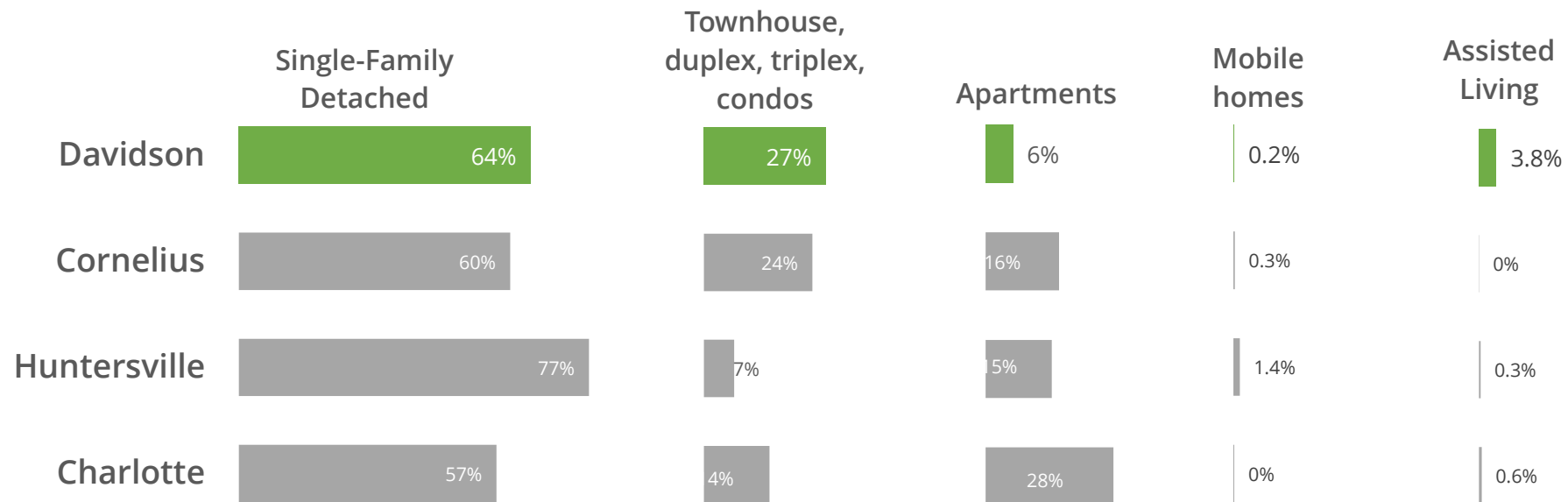


# Current housing inventory



Predominantly single-family homes, very few apartments

## Housing units by type 2016 Tax parcels



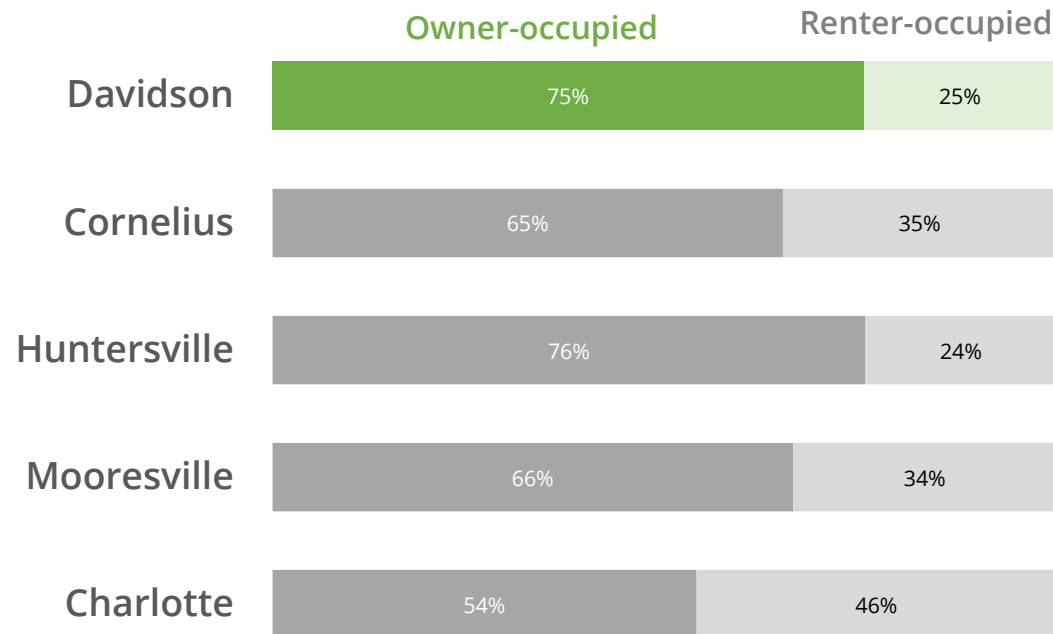
# Current housing inventory



Mostly owner-occupied, but rental has risen slightly

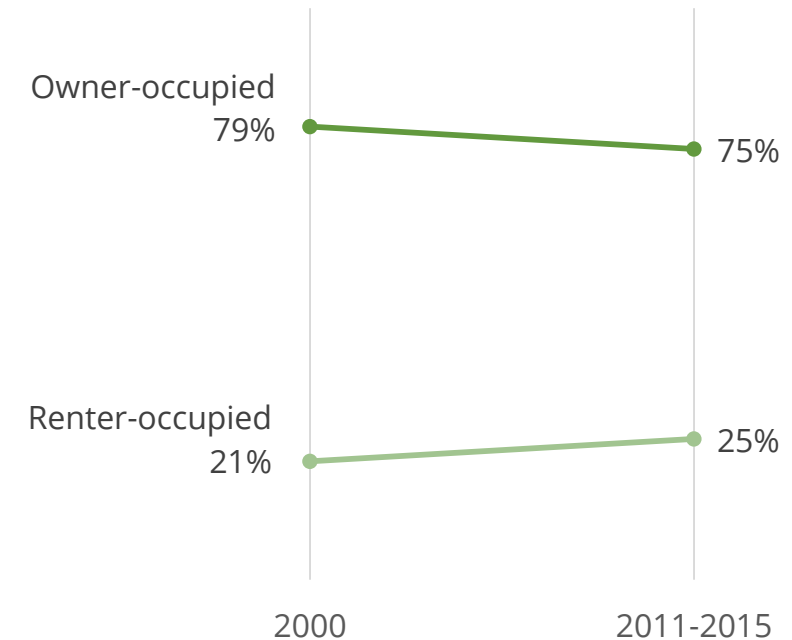
## Units by tenure

2011-2015 ACS

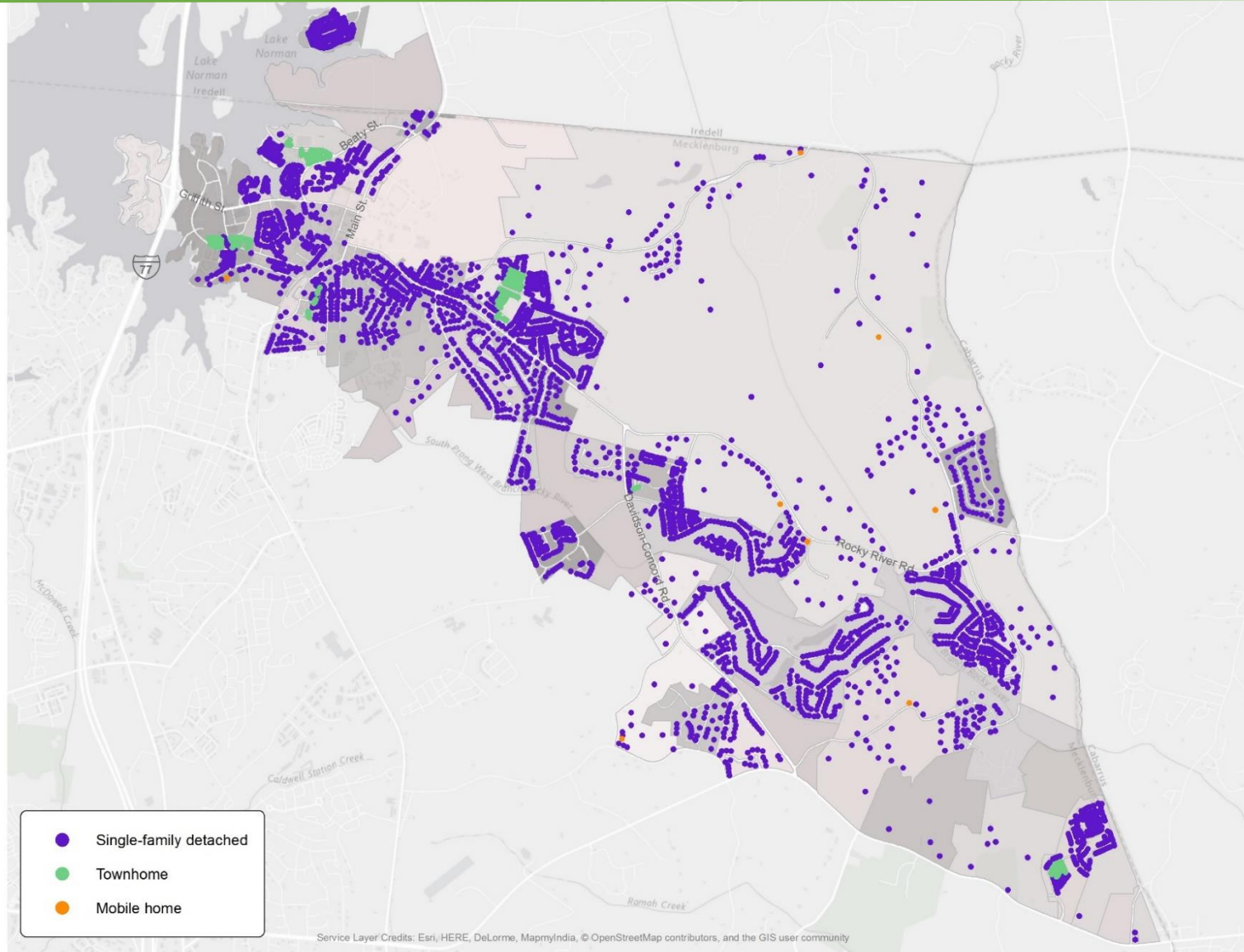


## Housing Tenure

2000 to 2011-2015

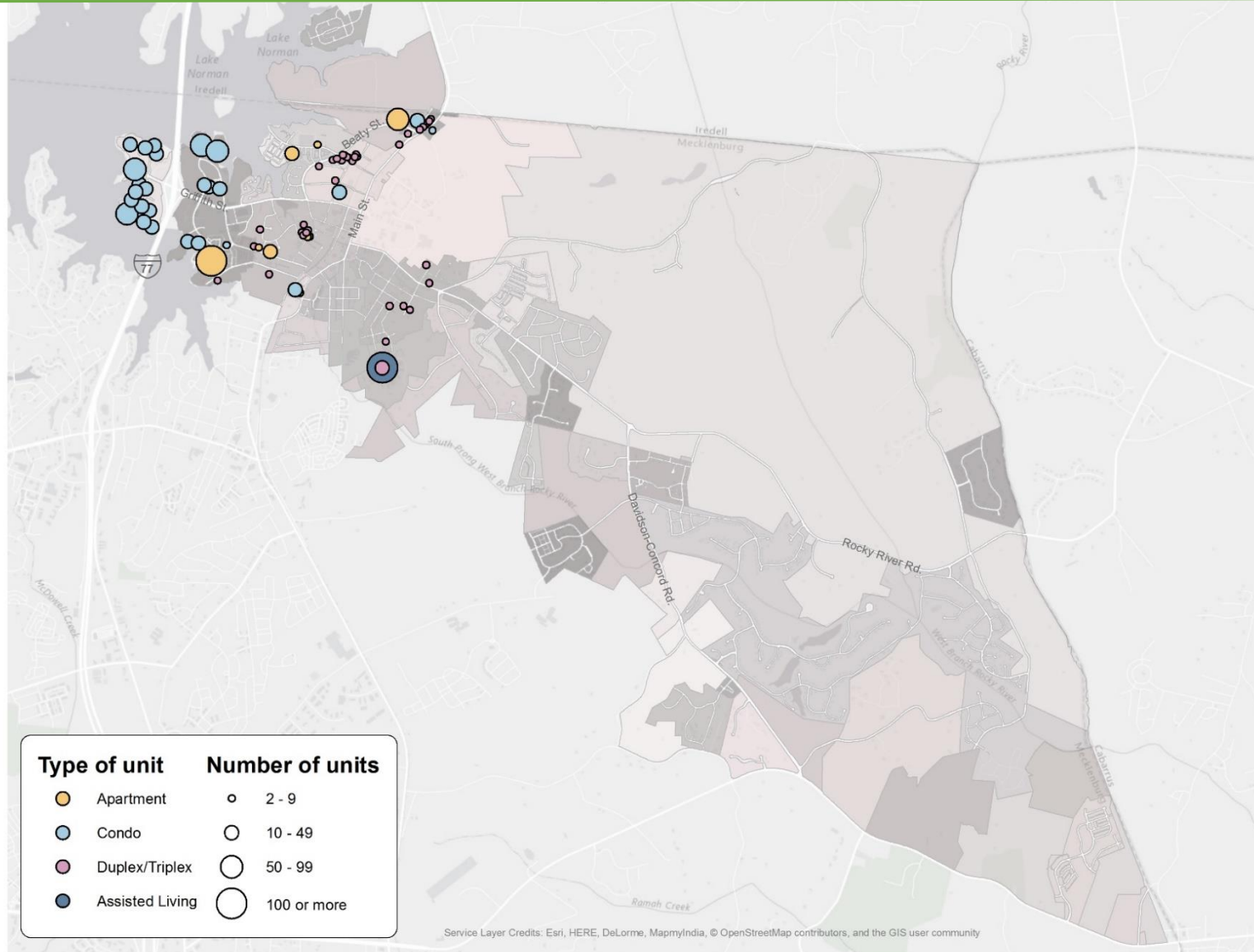


# Current housing inventory





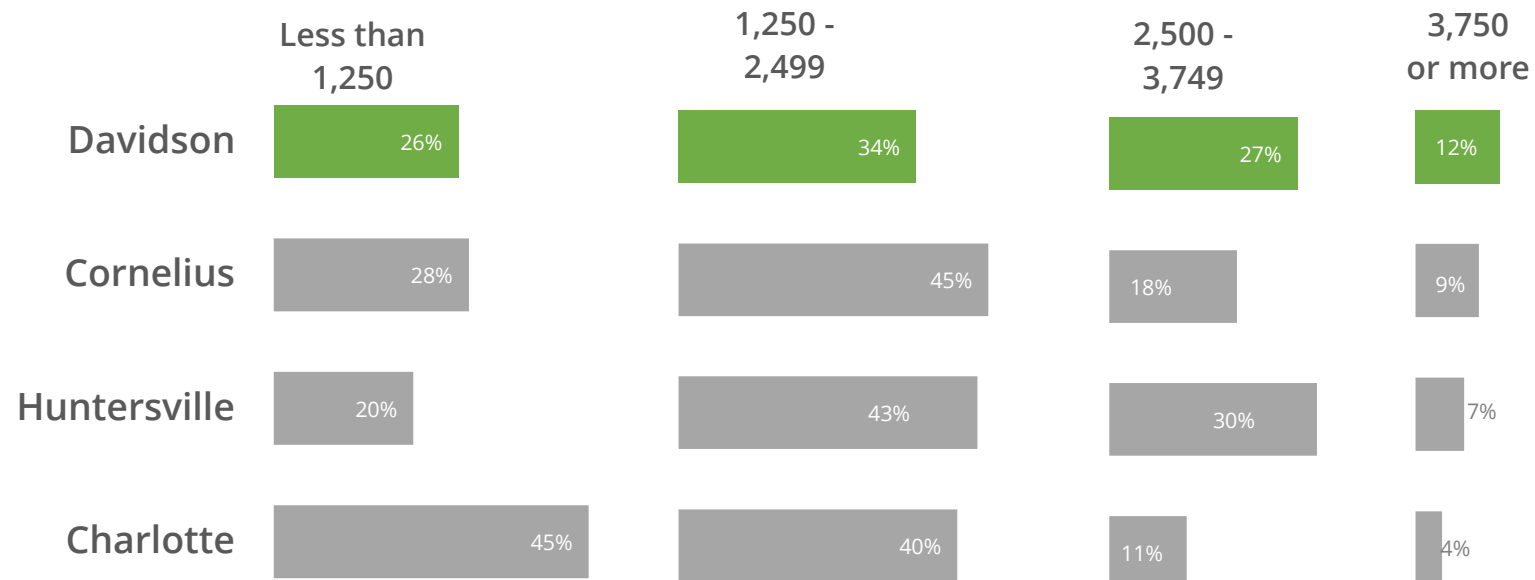
# Current housing inventory



# Current housing inventory



## Heated Square Feet 2016 Tax parcel data

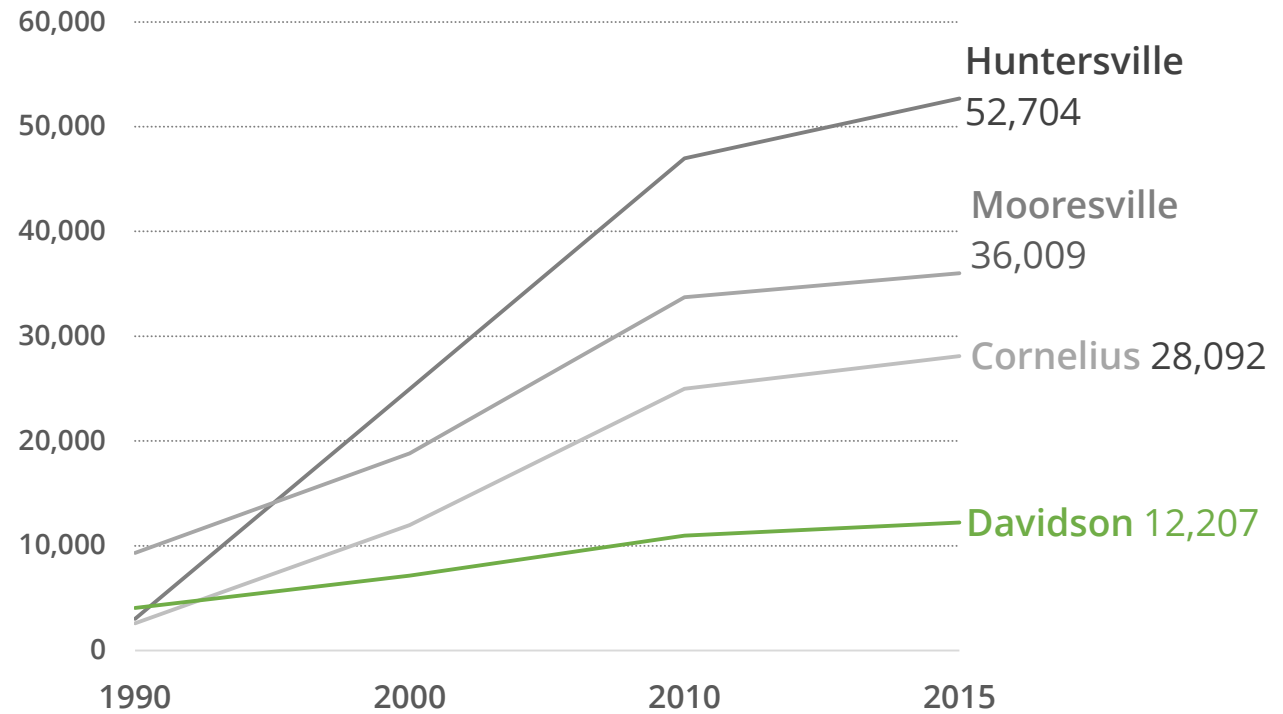


# Demographic shifts



Population is growing

Population Growth  
1990-2015

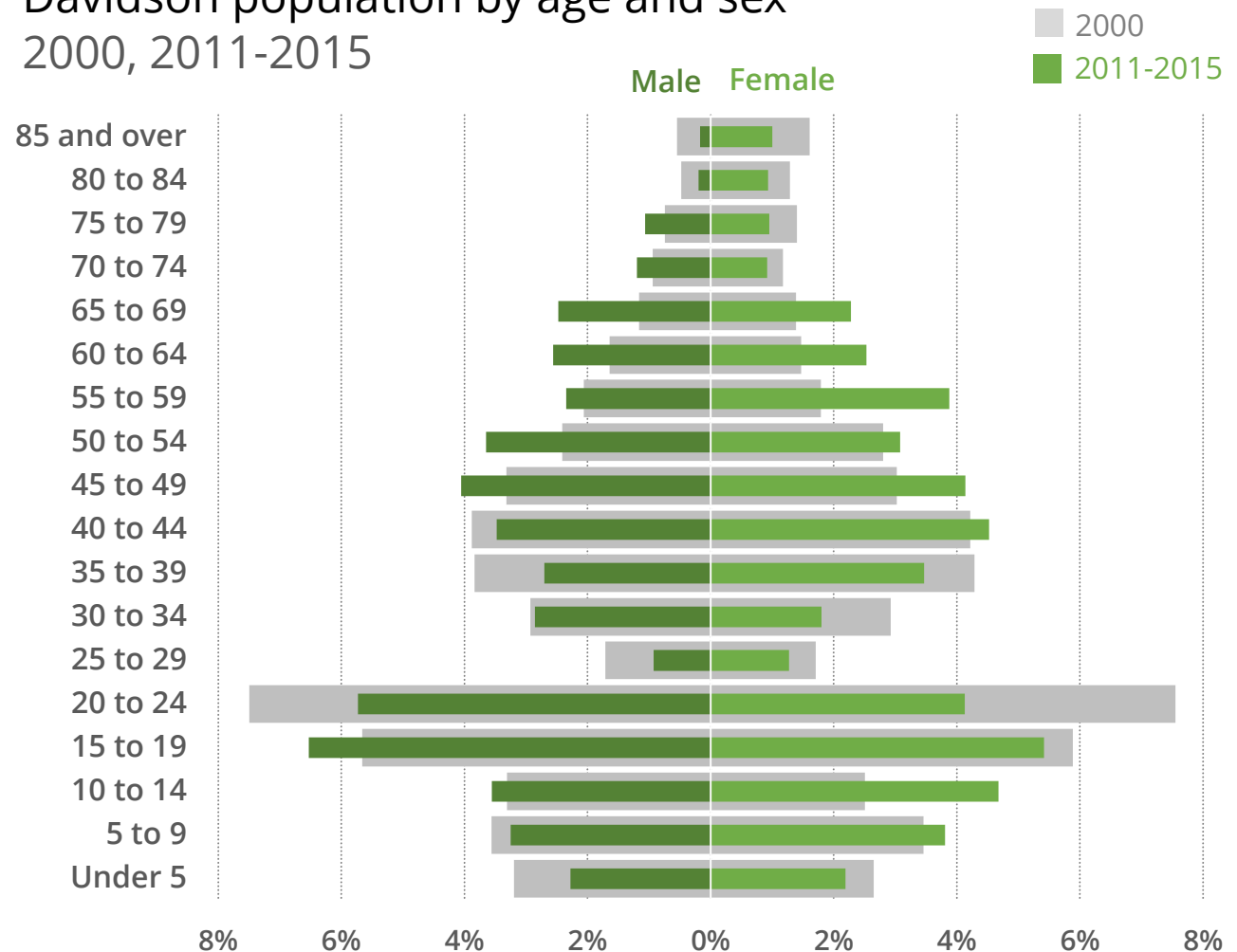




# Demographic shifts



Davidson population by age and sex  
2000, 2011-2015



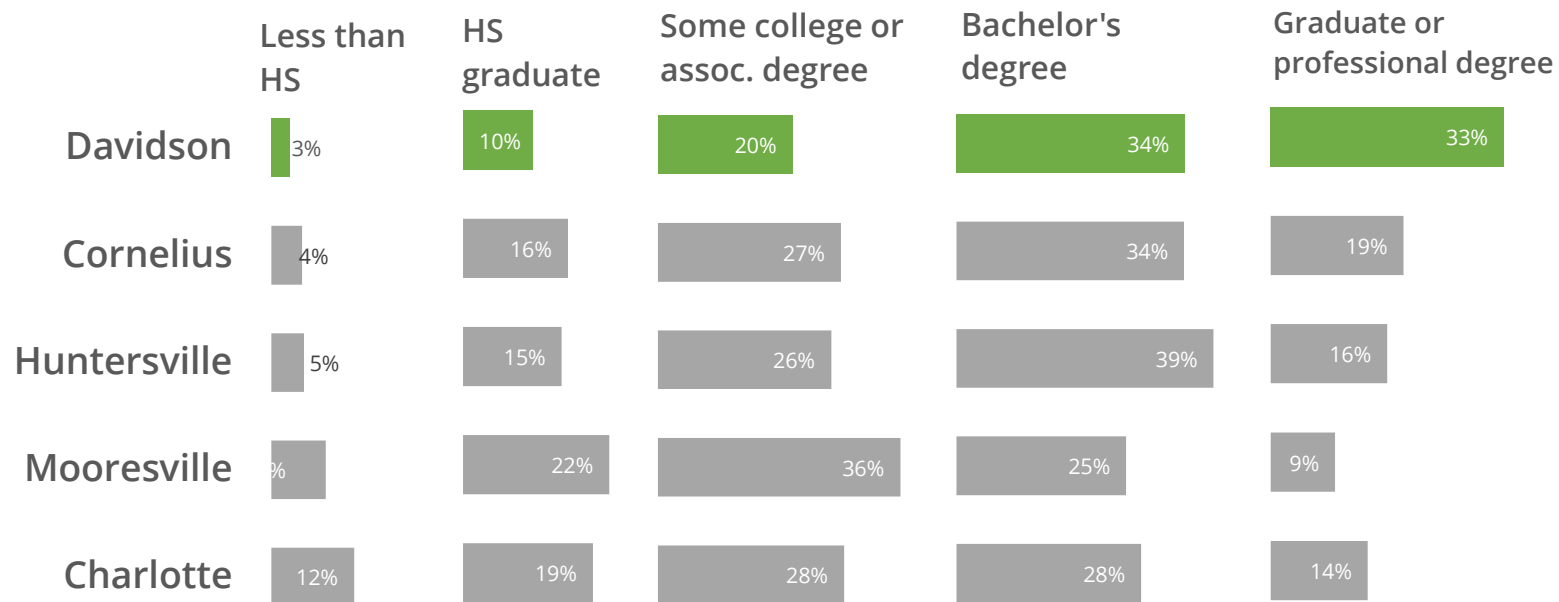
Population is growing,  
aging

# Demographic shifts

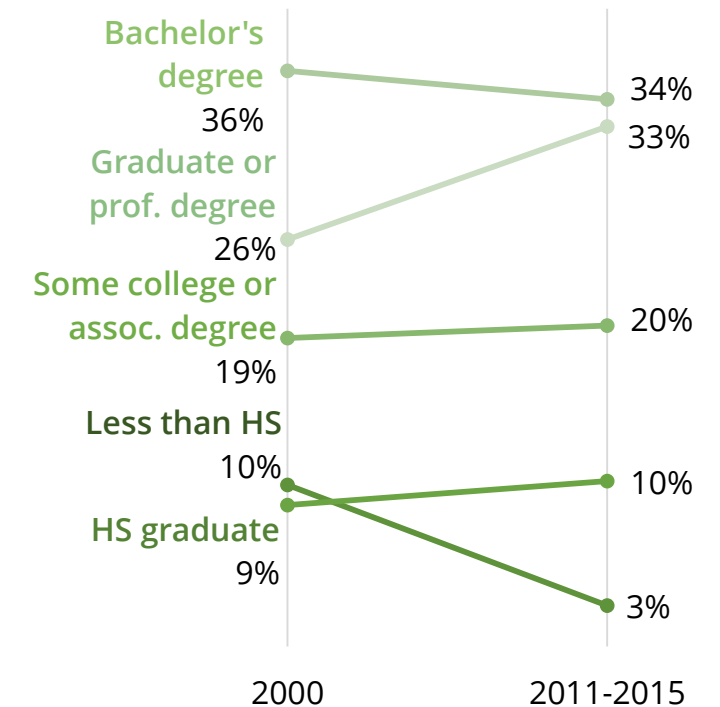


Population is growing, aging, and becoming more **educated**

Education  
2011-2015 ACS



Education  
2000 to 2011-2015



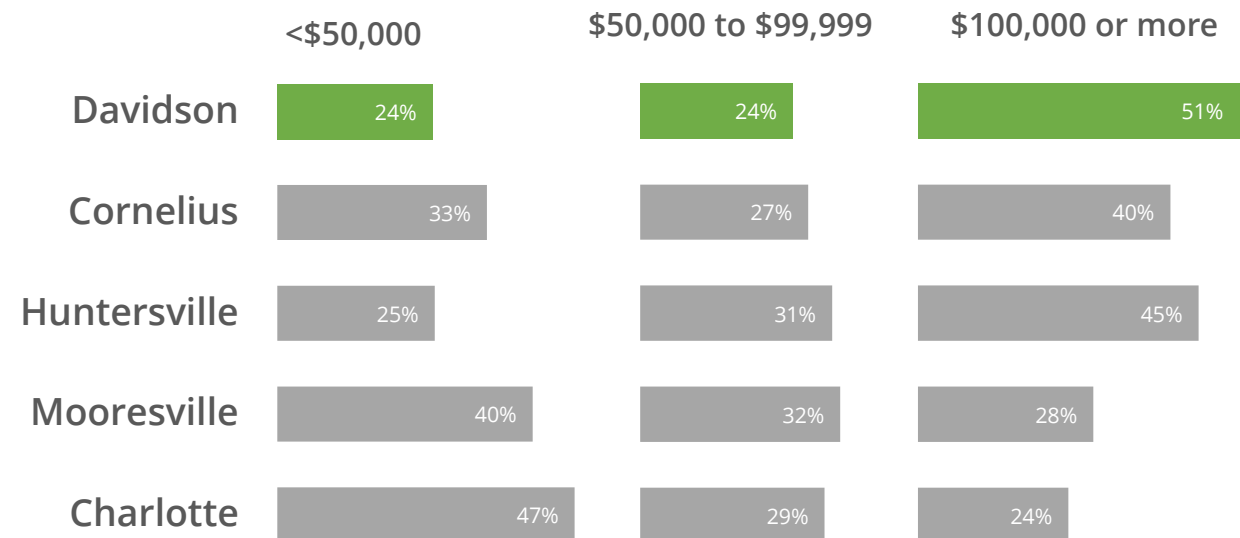
# Demographic shifts



Population is growing,  
aging, and becoming  
more educated and  
affluent

## Households by Income

2011-2015 ACS





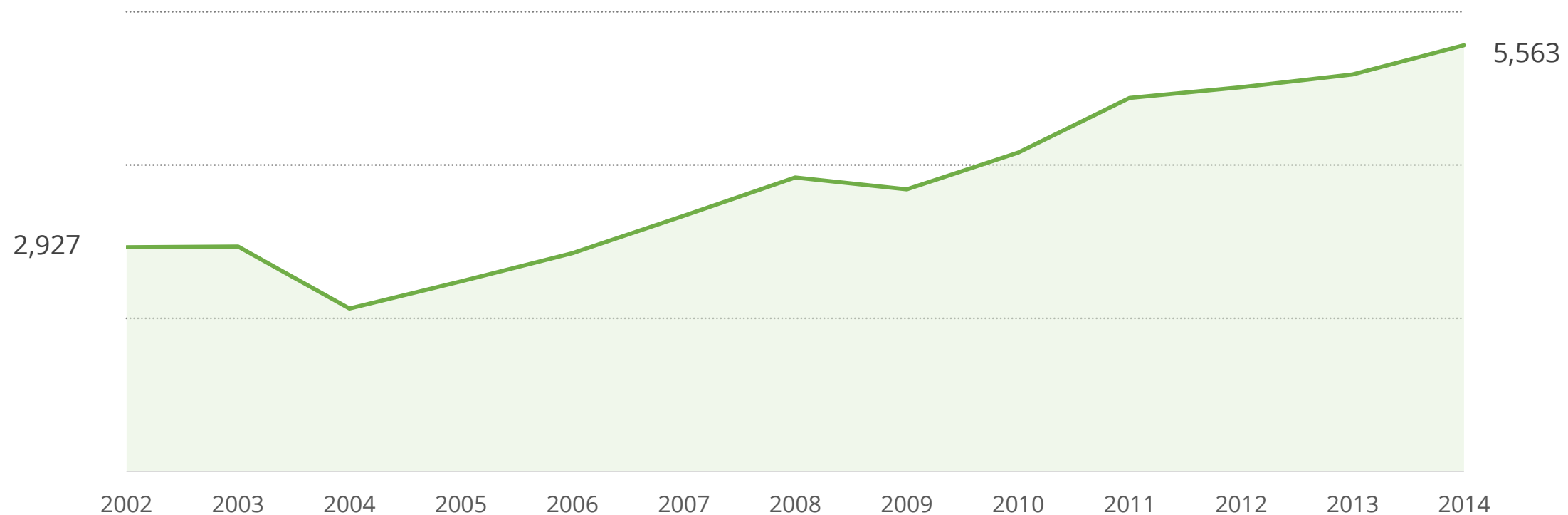


Who works in Davidson but can't afford to live there?

# Workforce is growing



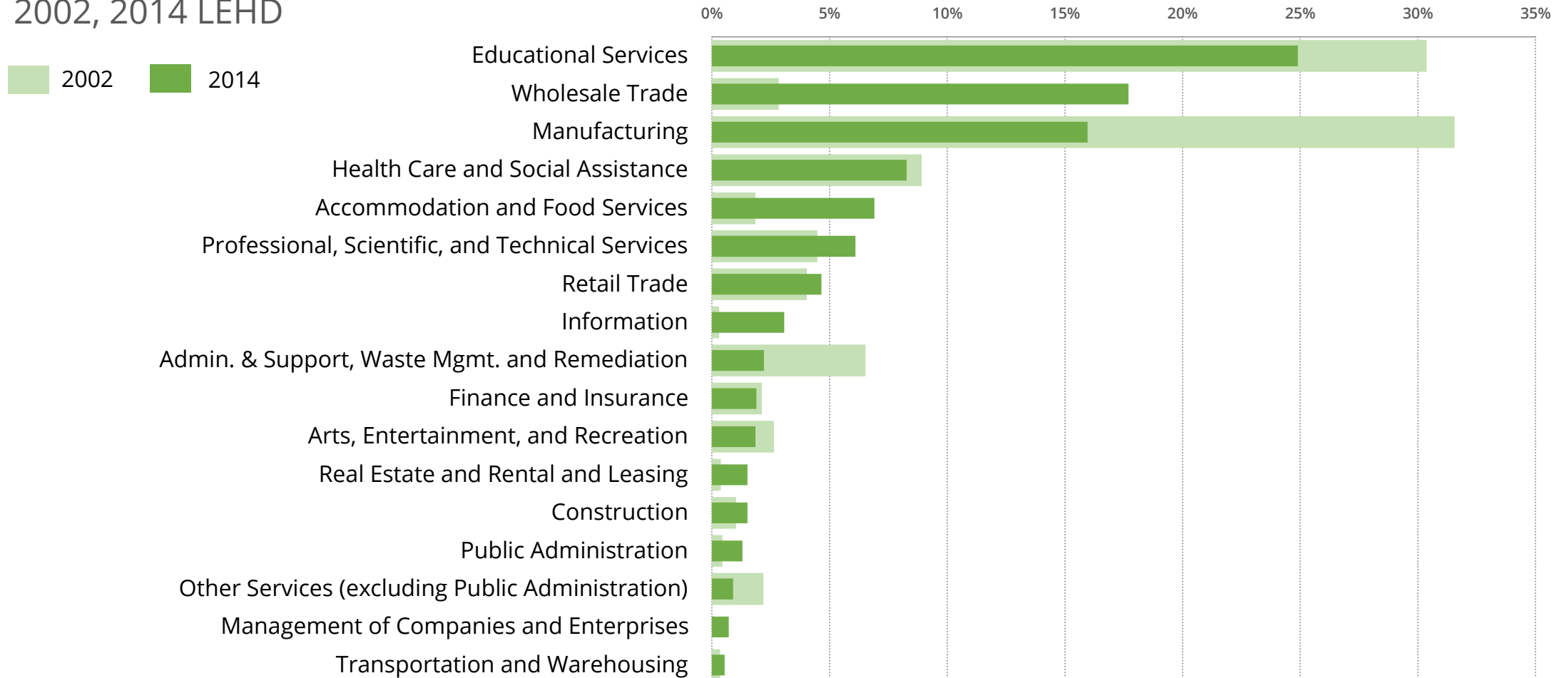
Total number of jobs in Davidson  
2002-2014 LEHD



# Workforce is diversifying

\$

## Employment by sector of Davidson workers 2002, 2014 LEHD



# Few Davidson workers live in Town

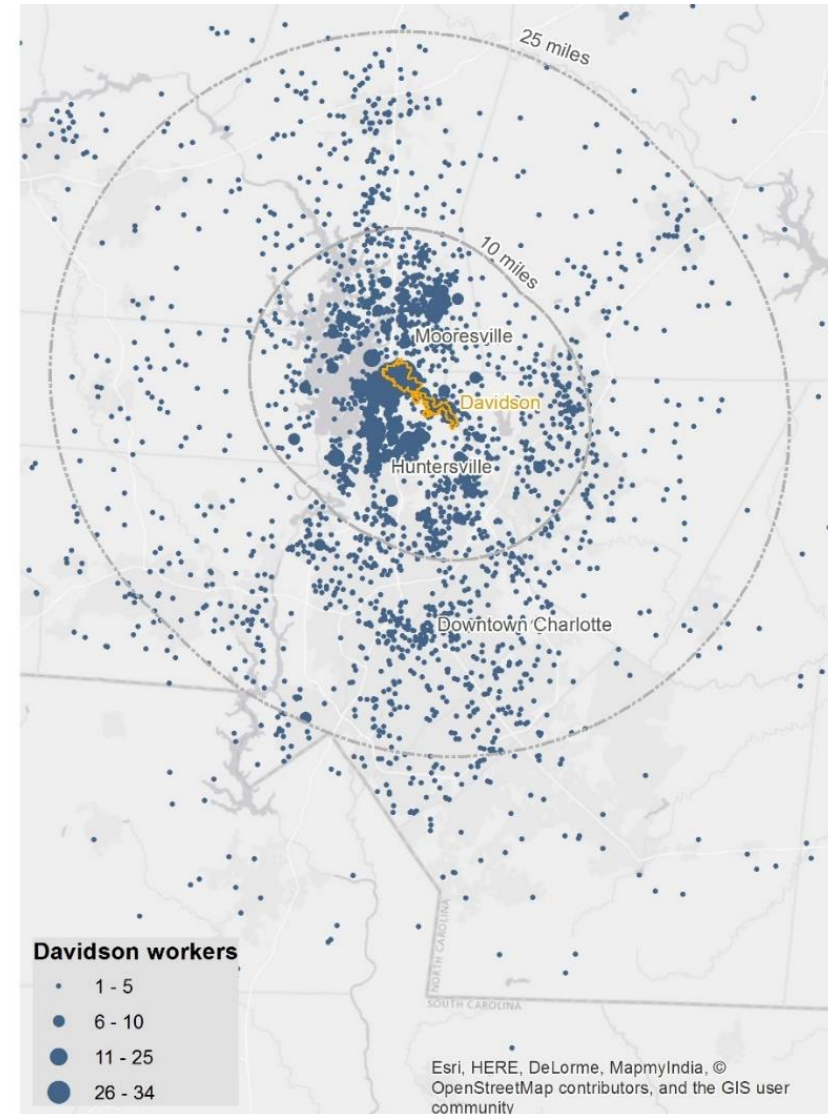
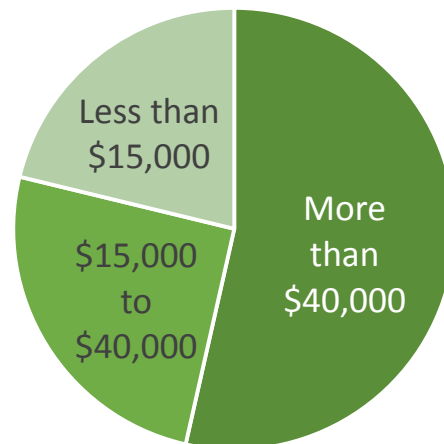
\$

## Workers by place of residence

2014 LEHD



## Davidson workers living elsewhere





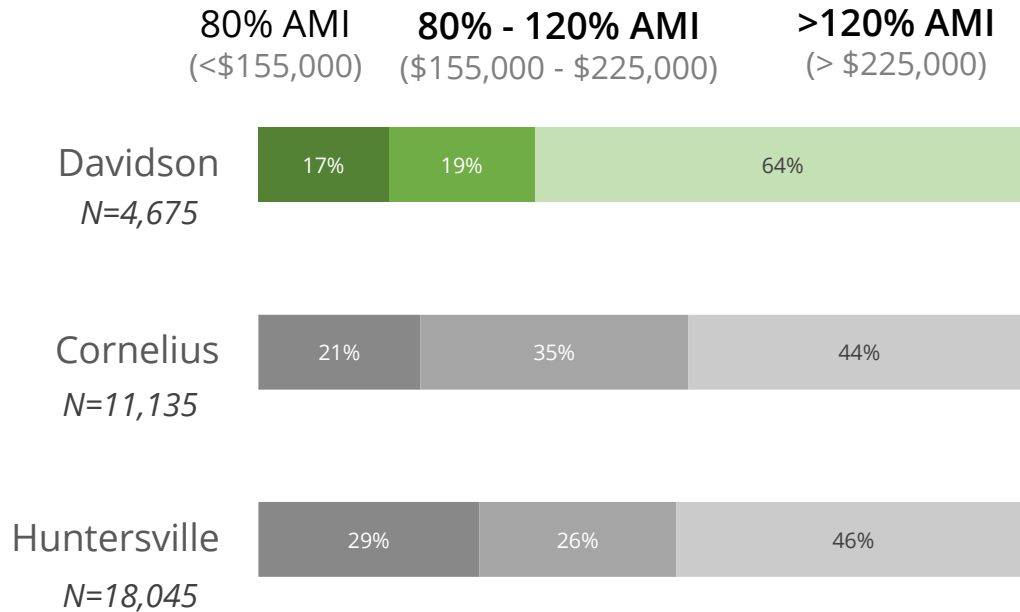
Housing needs along a spectrum of affordability



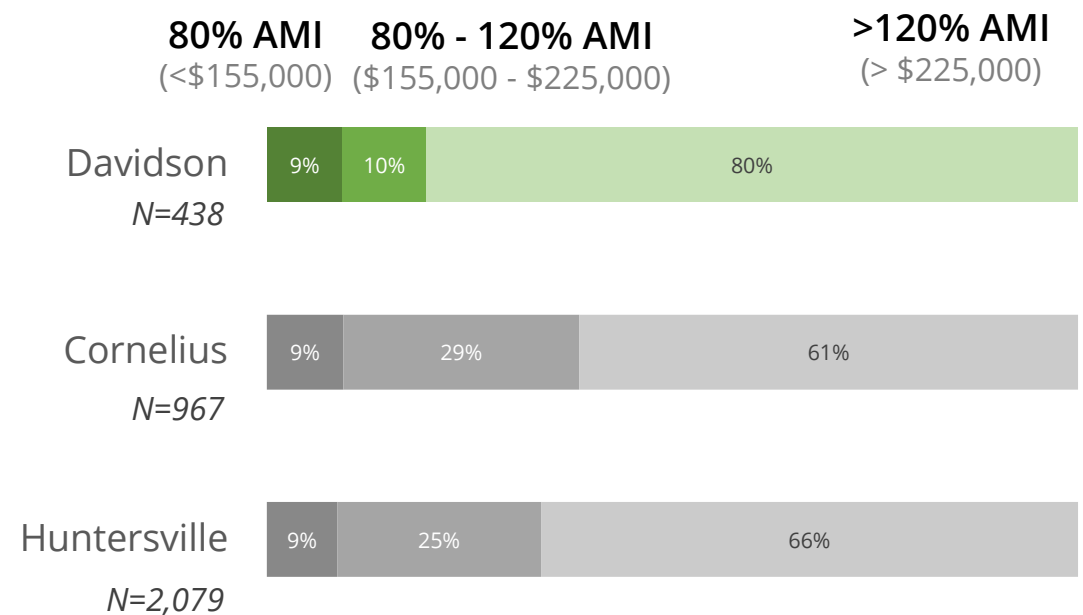
# Homes becoming less affordable



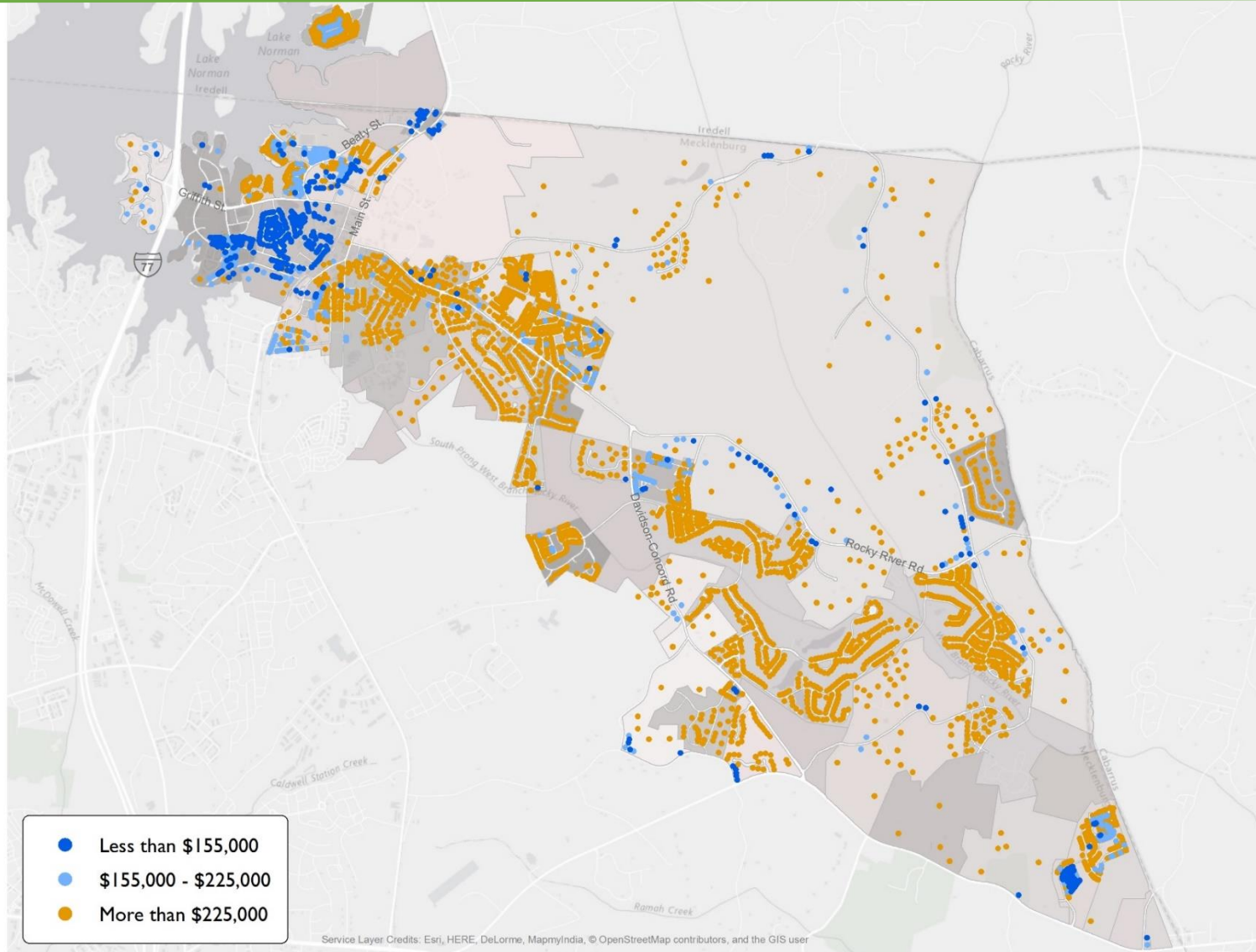
## Affordable Assessed Values 2011



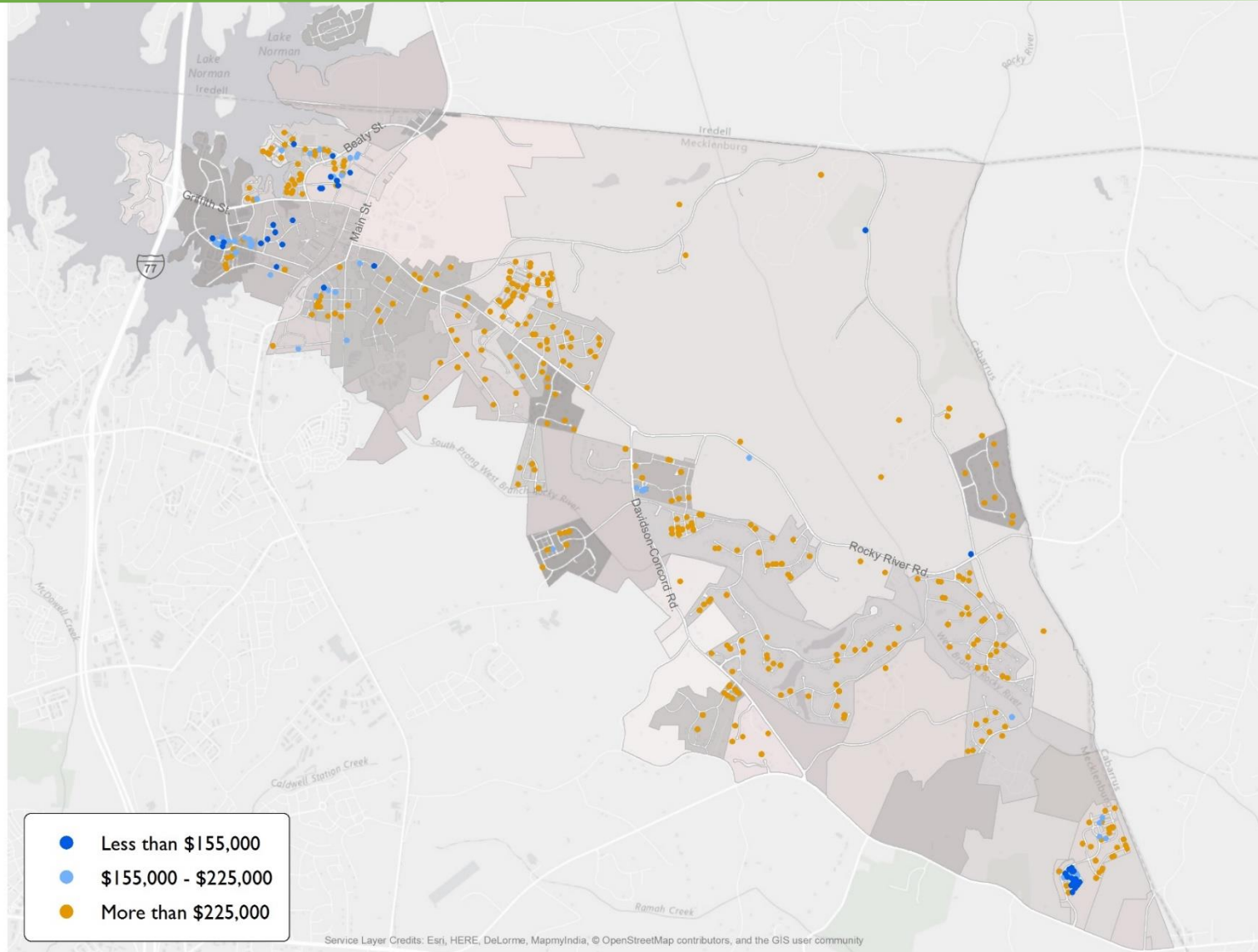
## Affordable Sales Values 2015-2016



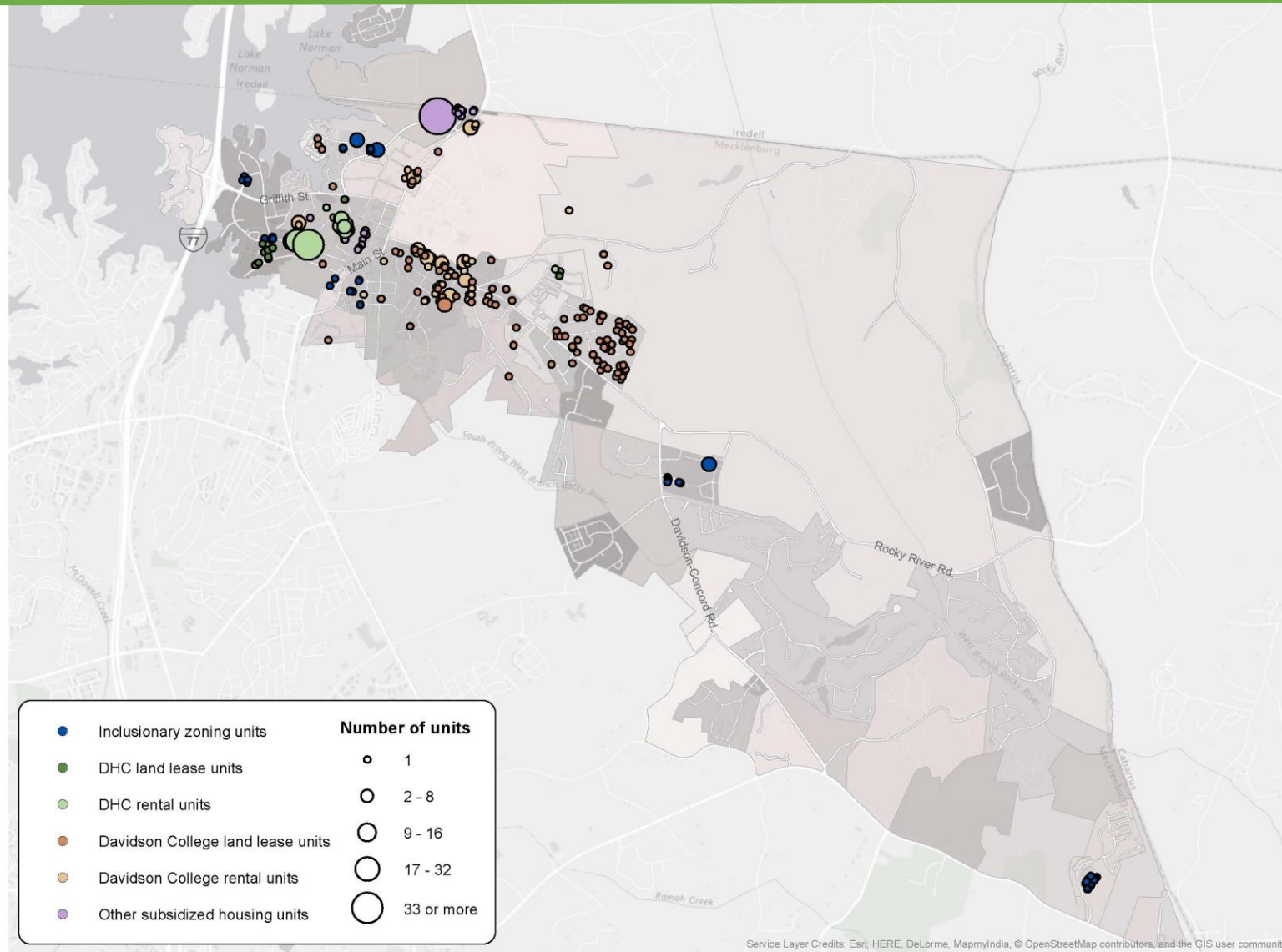
# Assessed value per unit (2011)



# Recent home sales price (2015-16)



# Subsidized housing

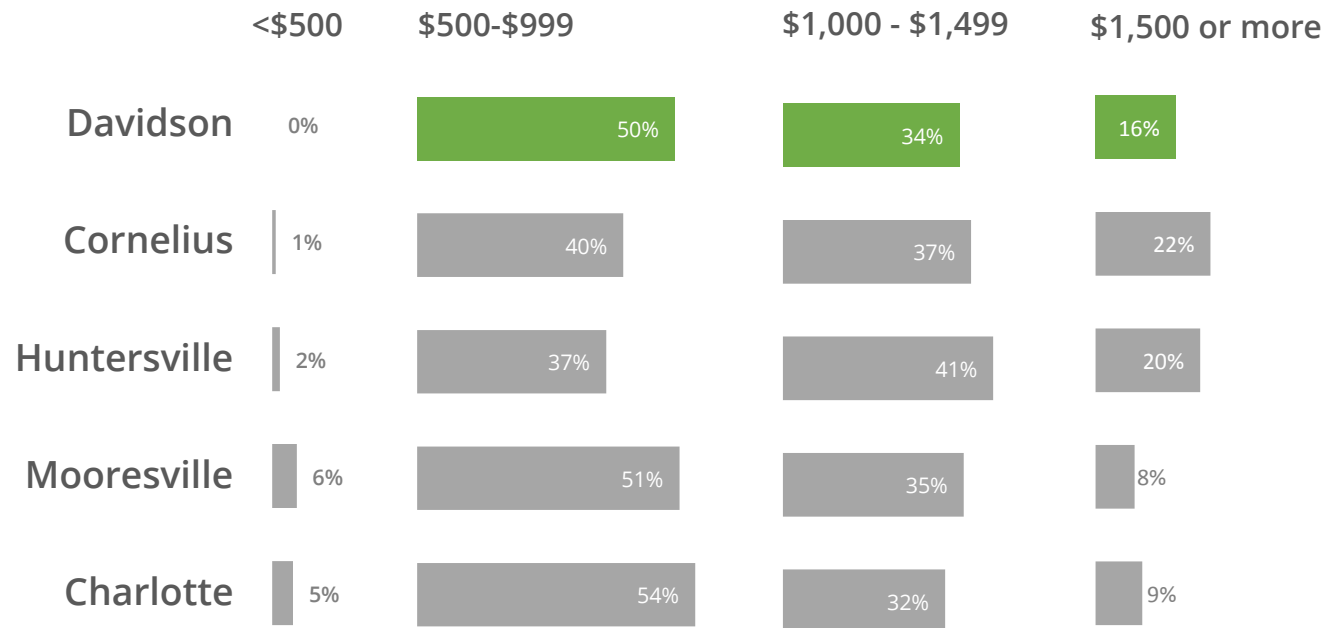


# Rent becoming less affordable

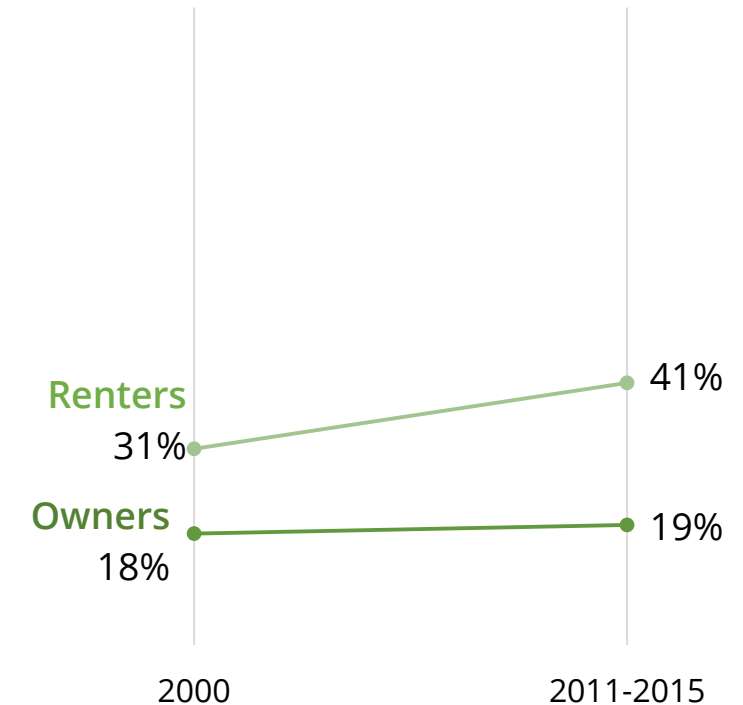


## Units by Gross Rent

2011-2015 ACS



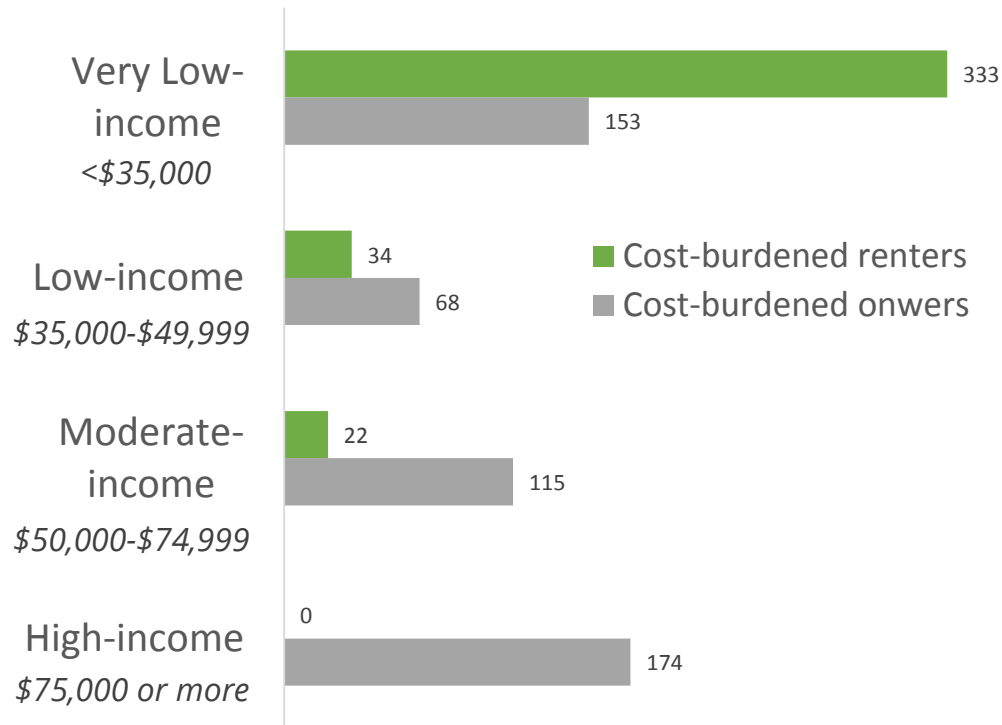
## Cost burdened households 2000 to 2011-2015



# Few affordable options for very low-income



Cost-burdened households by income  
2011-2015 ACS



- Extremely and Very low-income
  - 32 DHC rental units (< 50% AMI)
  - 72 Oak Hill apartments (<60% AMI)
  - 22 Habitat houses (30-60% AMI)
- Low-income
  - 750 naturally affordable homes
  - 30 DHC rental units (50-80% AMI)
- Moderate-income
  - 840 naturally affordable homes
  - 73 Town's affordable housing program (80-120% AMI)



# Complexities of developing affordable housing in Davidson



# Employer perspectives



- Davidson is not an island
- Region offers a broad array of housing options
- Lack of diversity hinders employee recruitment

# Influx of new residents



- Key informants support core value of affordable housing but are unsure about
  - How newer residents view affordable housing
  - Their knowledge about the Town's affordable housing ordinance

# Administration of Town program



- Use of payment in lieu funds
- Town's financial support of affordable housing
- Dual role of administration and legal defense

# West Side gentrification



- Complex set of issues and questions
  - Geographic distribution issue
  - Should steps be taken to retain naturally affordable housing on West Side?
  - Should the market be left to respond without interference?

# Open space preservation



- Also a core community value
- Can place upward pressures on land values

# Recommendations

# Education/awareness campaign

- Affordable housing
- Why it's important to Davidson
- Town Affordable Housing Ordinance



# Community discussion

- Meaning of “diverse and inclusive community”
- Goals for affordable housing
- Goals for increasing percent of workforce living in Davidson
  - Informed by survey of employees

# Explore ways to strengthen Town program

- Enhance existing housing ordinance administration
  - Expanded role for non-profit organization
  - Providing greater clarity about payment in lieu funds
- Dedicated revenue stream
- Creative solutions to geographic distribution issue
- Possible Town role for incentivizing more rental options





# TOWN OF DAVIDSON

## Housing Needs Assessment



## **Next Steps**

- Review/absorb Needs Assessment – questions
- April/May input meeting by UNCC UI – get feedback
- Provide Open Town Hall question on results
- Complete Affordable Housing Strategy document
  - Vision, goals, strategies
  - Recommendations – Citizen engagement
  - Payment in Lieu (PIL) options
  - Admin
  - Partners
  - Asheville ideas
- Goal is the Aug Board meeting
- Implementation after that



# TOWN OF DAVIDSON

## Housing Needs Assessment



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The UNC Charlotte Urban Institute is a nonpartisan, applied research and community outreach center at UNC Charlotte. Founded in 1969, it provides services including technical assistance and training in operations and data management; public opinion surveys; and research and analysis around economic, environmental, and social issues affecting the Charlotte region.

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# Key Definitions

## Affordable Housing

Generally, housing is considered affordable if a household does not spend more than 30% of their pre-tax gross annual income on rent and utilities. See page 27 for more details.

## Area Median Family Income (AMI)

The U.S. Department of Housing and Urban Development estimates the median family income for an area in the current year and adjusts that amount for different family sizes so that incomes may be expressed as a percentage of the area median income.

## Extra-territorial jurisdiction (ETJ)

Approximately 5,220 acres in size, the extra-territorial jurisdiction is under the municipal zoning control of the Town of Davidson but is outside of the Town's corporate boundaries.

## Extremely Low-Income

A household's annual income is less than 30% of the area median income.

## Fair Market Rent (FMR)

According to federal housing regulations, Fair Market Rent (FMR) means the rent that would be required to be paid in the particular housing market area in order to obtain privately owned, decent, safe and sanitary rental housing of modest (non-luxury) nature with suitable amenities. The FMR includes utilities (except telephone). Separate FMRs are established by the U.S. Department of Housing and Urban Development for dwelling units of varying sizes (number of bedrooms).

## Homeownership Rate

The number of owner-occupied units as a percentage of all occupied housing units.

## Housing Cost Burdened

If a household spends more than 30% of their pre-tax gross annual income on rent and utilities, then they are considered housing cost burdened. If a household spends more than 50% of their gross income on rent and utilities, then they are considered extremely housing cost burdened.

## Low-Income

A household's annual income is between 51% and 80% of the area median income.

## Mixed-Income Housing

Housing development that includes a diversity of units at a variety of price points.

## Moderate-Income

A household's annual income is between 81% and 120% of the area median income.

## Very Low-Income

A household's annual income is between 30% and 50% of the area median income.

## Subsidized housing

Subsidized refers to units where the occupants receive any financial assistance toward housing costs, including from both private and public sources.

## Tenure

Refers to whether a unit is owner-occupied or renter-occupied.

# Introduction

## Purpose of Study

This report presents the findings of a comprehensive housing needs assessment conducted by the UNC Charlotte Urban Institute for the Town of Davidson, North Carolina (The Town). Davidson is one of three municipalities in North Carolina with an affordable housing ordinance, created in 2001 to encourage more affordable housing options as a means of promoting greater diversity. After fifteen years of administering the program, in 2016, the Town's Board of Commissioners and staff decided to review the housing needs of Davidson within the context of current population and employment trends, rising

housing and land values, and recent questions raised about the program by both the development community and neighborhood associations.

This analysis is an initial step in that review process, providing both quantitative data and key stakeholder feedback to assist the Town in assessing the current state of affordable housing in Davidson and in identifying challenges and opportunities for the Town's affordable housing program. Specifically, the Town's Board of Commissioners and staff are seeking answers to the following questions:



1. What is the Town's current housing inventory and what are the emerging needs based on demographic shifts?



2. Who works in Davidson but can't afford to live there?



3. What are the housing needs in Davidson along a spectrum of affordability?



4. What are the complexities and context of developing affordable housing in Davidson?

This report begins with a comprehensive analysis of demographic and employment trends in the Town and nearby communities, as well as an assessment of the Town's current housing inventory. Together these data help answer the first three questions, presenting a richer understanding of the need for affordable housing in Davidson, and on the supply side, the adequacy of current "for sale" and rental units to serve low- and middle-income households.

In order to provide context about the complexities of developing affordable housing in the Town (the fourth question), this report also provides insight into how nearly 40 civic, business and neighborhood leaders view housing affordability and efforts to address affordable housing in the Town. These perspectives were obtained through a combination of key informant and group interviews. While not presented here as a representative sample of the Town's residents, they nonetheless provide meaningful perspective on both the successes and challenges the Town has experienced over the past fifteen years, especially as it relates to the affordable housing program and its administration.

In closing, it should be noted that this housing needs assessment stops short of making formal recommendations about the number of affordable housing units needed in Davidson, as that was outside the requested scope of analysis. Instead, this report provides contextual material that can be used to inform a broader community dialogue on how to adapt the Town's affordable housing strategy – perhaps using best practices from other communities – to make the Town's housing programs more responsive to today's needs and challenges, while still achieving the Town's core value of "encourage(ing) opportunities, services, and infrastructure that allow people of all means to live and work (in Davidson)".

## Background

To understand the current environment and conditions impacting Davidson's affordable housing program, it is important to be familiar with the program's history. In 2001, the Town enacted what remains one of only three affordable housing ordinances in North Carolina. The ordinance grew out of the Town's commitment to diversity as expressed in a core values document: "Davidson's historic mix of people in all income levels and ages is fundamental to our community, so town government will encourage opportunities, services, and infrastructure that allow people of all means to live and work here."

At the time the ordinance was enacted, the Davidson community already had a rich tradition of addressing affordable housing, with Davidson College leading the way. The college had long been proactive in developing affordable housing options for its faculty and staff. Through a combination of financial support programs and creative real estate arrangements practiced over many decades, the college had actively worked (as it still does) to promote opportunities for its faculty and staff to live in close proximity to the college. The most well-known of these programs is the college's land lease program (modeled after a similar program at Stanford University), and the college's co-development of the McConnell neighborhood beginning around 1990, where today nearly 40% of the houses are still part of Davidson College's land lease program.

It was with this community history and tradition that the Town of Davidson began exploring strategies for the Town itself to become more intentional about and active in promoting affordable housing, including the possibility of using its regulatory authority to expand affordable housing options for homeowners. After reviewing national models and seeking community input, the Town adopted its inclusionary housing ordinance in 2001. That original ordinance required that, for new

developments of eight or more “for sale” housing units, 12.5% had to be affordable. Legal and political challenges have since resulted in some changes to how the program is administered, including a relaxing of the ordinance’s original limits on when a “fee in lieu of housing” is permissible, as well as a reduction in the amount of that fee. This fee in lieu is paid to the Town, which then uses the funds for affordable housing activities. The current ordinance requires that of the 12.5% of affordable units in a development, 0-20% must be for moderate income households (80%-120% AMI), 0-70% for low income households (50%-80% AMI), and 30%-100% for very low income households (30%-50% AMI).<sup>1</sup>

While Davidson’s program has been widely recognized as a model for how local governments can be more intentional about encouraging the private sector to provide affordable housing, it has also experienced some challenges since it was enacted. For one, as this report demonstrates, the northern part of Mecklenburg County has experienced dramatic population and employment growth since 2001. This growth has placed tremendous upward pressures on the value of land and housing in Davidson’s jurisdiction, not only making the issue of affordable housing more relevant than ever, but also making it more difficult to acquire the land necessary to build it.

The increase in development activity over the past decade also means there is now more experience with implementing the affordable housing ordinance among Town officials, the development community and neighborhood associations. This experience and familiarity has raised new questions about how the program is administered, the financial costs to developers, the geographic distribution and placement of affordable housing, and the ability of the program to keep up with growing demand. Some developers have opted to pay the fee in lieu, which has resulted in a small pool of funds for the Town to use for affordable housing activities. There is also a growing interest in the potential role that rental units/apartments might play in the provision of affordable housing in Davidson, something the ordinance does not (and cannot legally) address.

As the Town of Davidson prepares to review its affordable housing strategy, the demographic, employment and housing data presented in this report should provide an important baseline of understanding of the current conditions impacting the program’s long-term success. In addition, the feedback obtained from the many community stakeholders interviewed as part of this assessment should likewise provide an important contextual understanding of how the program is viewed by those whose work and community engagement are directly impacted by it.

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<sup>1</sup> The full ordinance can be accessed here: <http://nc-davidson3.civicplus.com/DocumentCenter/View/6382>



# Demographics

## Methodology

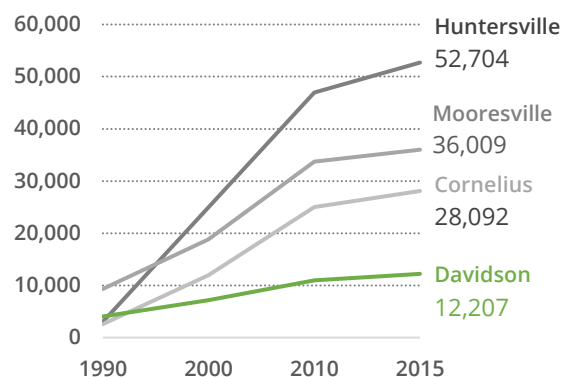
Data for this section come from the U.S. Census Bureau's Decennial Census, 2015 Population Estimates, and the 2015 American Community Survey (ACS) 5-year estimates. The 2015 ACS includes data collected over a 5-year period (2011-2015) in order to achieve a large enough sample size for small places, such as Davidson. Even so, as sample data, a degree of uncertainty around the reported numbers must be acknowledged. These data reflect the people and area within the Town limits and do not include the extra-territorial jurisdiction (ETJ).

## Who lives in Davidson?

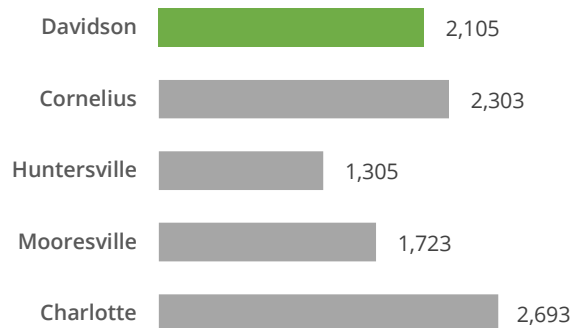
Nestled in the northeastern corner of Mecklenburg County, the Town of Davidson is a small but growing suburb of Charlotte. A little over 20 miles north of downtown Charlotte, Davidson is home to just over 12,000 people, according to the most recent Census population estimates, and has tripled in size since 1990, when the population was about 4,000. Even so, Davidson has not seen nearly as much growth as the nearby towns of Huntersville, Cornelius, and Mooresville, which also began the 1990s with around 4,000 people (with the exception of Mooresville, which was closer to 10,000) and now number in the 25,000 to 50,000 range.

As the population has grown, so has the land area encompassed within the Town borders. In fact, the Town's land area has doubled, from 2.8 square miles in 1990 to 5.8 square miles in 2015. The Town's population grew faster than the land area, resulting in an increase in population density. Population density rose from about 1,500 people per square mile in 1990 to 2,100 in 2015. Davidson has slightly lower population density than Cornelius and Charlotte but is more compact than Huntersville and Mooresville.

Population Growth  
1990-2015

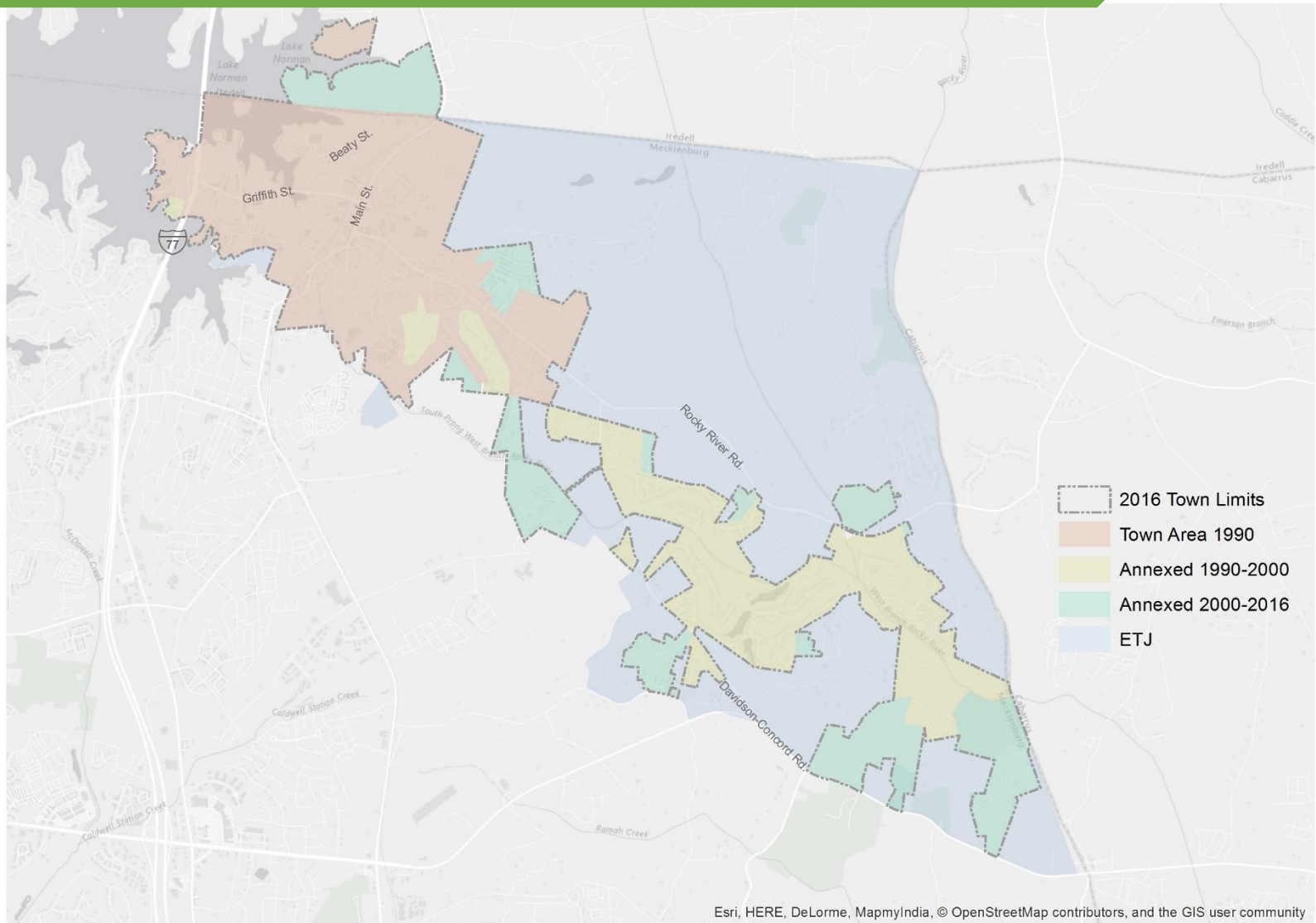


Population Density per Square Mile  
2015



# Town of Davidson Municipal Boundaries

Town of Davidson Planning Department



## Age

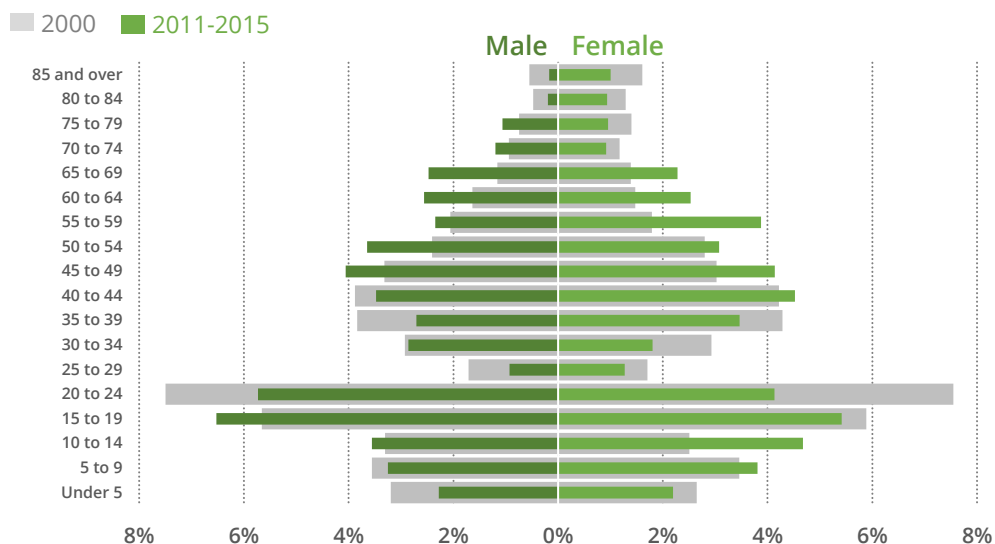
The age structure of Davidson is similar in many ways to other suburbs. The large swells in the population pyramid at the bottom and toward the middle are typical of most suburbs and reflect the strong presence of families with children (adults in their 40s and 50s and grade school age children). The 15-19 and 20-24 age groups are more prominent in Davidson than the typical suburb, due to the influence of Davidson College.

The sizeable divot in the middle is older millennials (ages 25 to 39). This group is small in most suburbs, but the lack of millennials is even more pronounced in Davidson. Millennials have been noted in recent years for their strong preferences for living in urban areas with vibrant, walkable downtowns full of amenities. However, these preferences may be changing. According to a recent study by the Urban Land Institute, “Many feel that time is on the suburbs’ side. They argue that the deferral of marriage and family formation by millennials, and the related preference for downtown living in

denser, more active “mating markets,” is just that: deferral. Eventually, the logic goes, generation Y will follow the baby boomers’ path and head to the suburbs in the child-rearing years.”<sup>2</sup> The Joint Center for Housing Study at Harvard notes that millennials will start to play a bigger role in the housing market, but at the same time, they “have come of age in an era of lower incomes, higher rents, and more cautious attitudes towards credit and homeownership,” which may impact their home buying habits.<sup>3</sup>

**Changes since 2000:** Davidson’s population is slightly older than it was in 2000, reflecting the aging of baby boomers ages 45-69. While the population is slightly older overall, the share of people ages 80 and over decreased slightly. Slight decreases are also noted in the share of young children (under 5); and adults ages 20-39, which is partially reflective of the aging of GenXers and a lack of millennials.

Davidson population by age and sex  
2000, 2011-2015



<sup>2</sup><http://uli.org/wp-content/uploads/ULI-Documents/Emerging-Trends-in-Real-Estate-United-States-and-Canada-2016.pdf>

<sup>3</sup>[http://www.jchs.harvard.edu/sites/jchs.harvard.edu/files/jchs\\_2016\\_state\\_of\\_the\\_nations\\_housing\\_lowres.pdf](http://www.jchs.harvard.edu/sites/jchs.harvard.edu/files/jchs_2016_state_of_the_nations_housing_lowres.pdf)

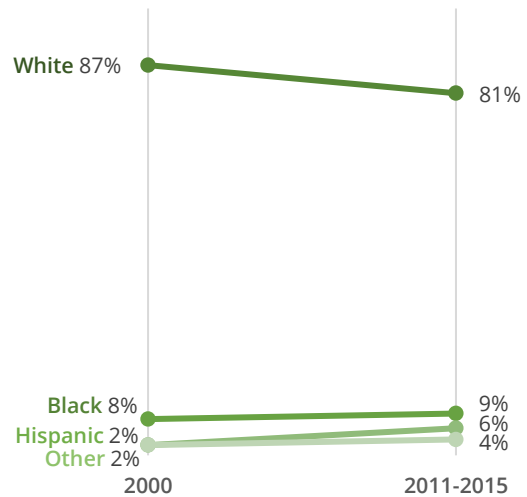


## Race/Ethnicity

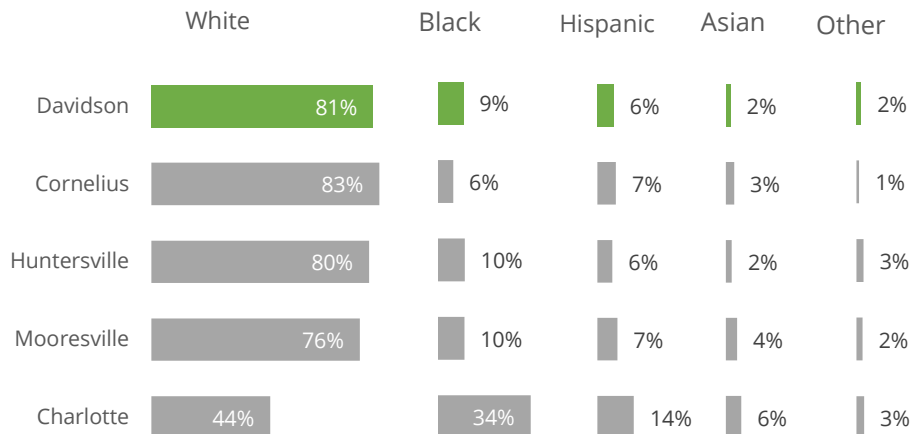
The population of Davidson is predominantly white, accounting for 81% of the population. About 9% of the population identifies as black, 6% as Hispanic, 2% as Asian, and 2% as another race. This is fairly similar to the other nearby towns and far less diverse than Charlotte.

**Since 2000:** Davidson's population is somewhat more diverse than it was before the advent of the affordable housing ordinance. The share of the population that is white has gone down from 87% in 2000. The black population has largely remained the same. Much of the change has come from an increase in the Hispanic population and, to a lesser extent, those of other races (Asian and people of mixed race/ethnicity). These changes are in step with, albeit on a smaller scale, trends seen across southern cities.

Race/Ethnicity  
2000 to 2011-2015



Race/Ethnicity  
2011-2015





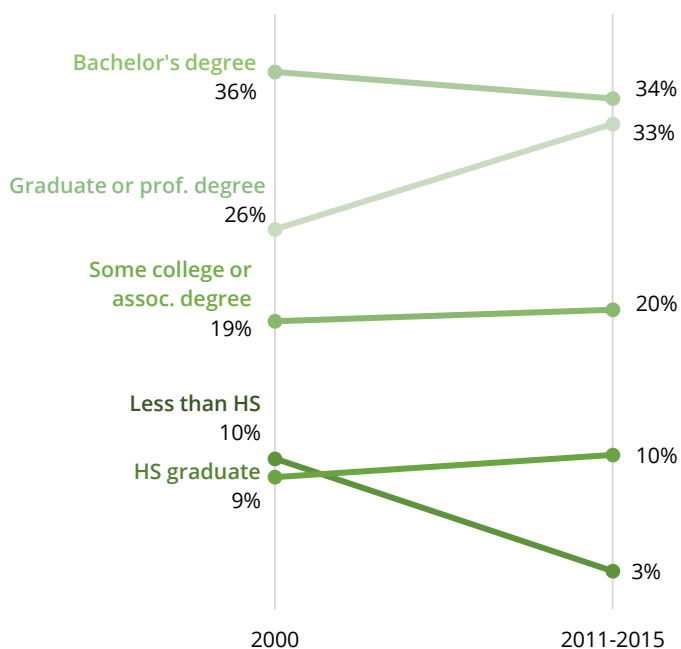
## Education

Davidson's population is highly educated. More than two-thirds of Town residents have a bachelor's degree, and one-third have a graduate or professional degree. Although Huntersville and Cornelius have similarly high shares of residents with bachelor's degrees, the proportion with graduate or professional degrees is practically half that of Davidson. This likely reflects the influence of Davidson College. A number of the college's highly educated faculty live nearby, thanks in part to the college's land lease program. The presence of the college and faculty also attract other highly-educated people to the Town.

**Since 2000:** The prevalence of highly educated residents has become more pronounced over the past 15 years. The share of the population with graduate or professional degrees has risen from around one-quarter in 2000 to one-third in 2015. At the same time, the share of the population that did not finish high school declined from 10% to 3%. Similar shifts have occurred in Cornelius and Huntersville, but not quite to the same degree as Davidson.

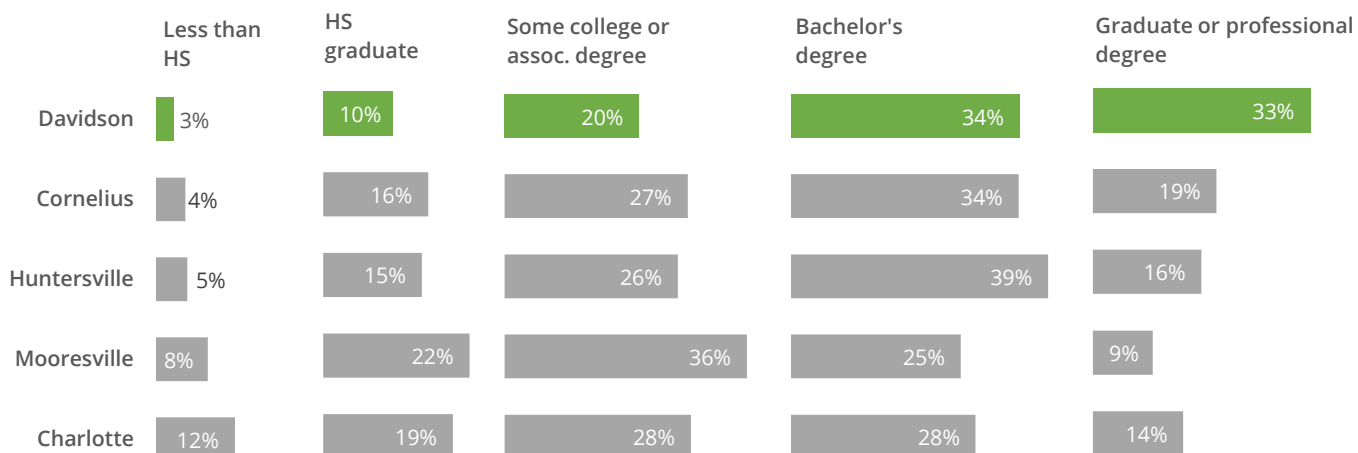
### Education

2000 to 2011-2015



### Education

2011-2015



# Household structure

## Household Size

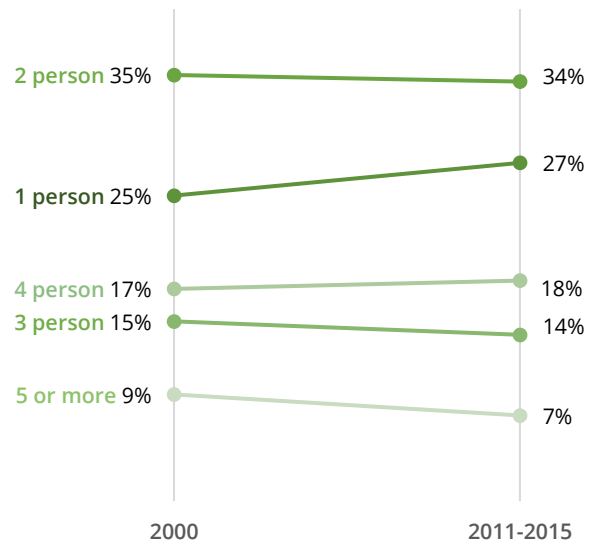
The majority of Davidson households consist of one or two people. One-third of households are 2-person, and 27% are 1-person. This is similar to Cornelius and Charlotte but a larger share than Huntersville and Mooresville.

Seniors make up a big portion of Davidson's 1-person households. In fact, individuals age 65 and over account for 34% of the 1-person households in Town but only represent 11% of the total population. For comparison, 27% of 1-person households in Cornelius are headed by seniors.

**Since 2000:** This distribution has changed little in the past 15 years, with only a slight increase in 1-person households and slight decrease in households with 5 or more.

## Household Size

2000 to 2011-2015



## Households by Size

2011-2015

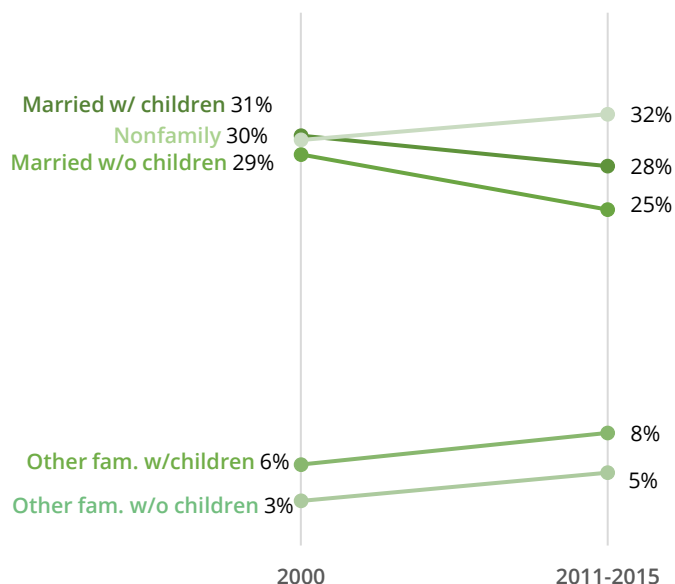
	1 person	2 person	3 person	4 person	5 or more
Davidson	27%	34%	14%	18%	7%
Cornelius	30%	37%	17%	9%	7%
Huntersville	21%	32%	20%	18%	9%
Mooresville	25%	28%	18%	18%	11%
Charlotte	31%	32%	16%	13%	8%

## Household Type

Non-family households, which include individuals living alone or with nonrelatives only (like unmarried couples), are the most prevalent household type in Davidson, comprising 32% of households. Twenty-eight percent are married couples with children, and 25% are married couples without children. The remainder fall in the other types of family households. Of the neighboring towns, Davidson is most like Mooresville in the breakdown of household type, with a slightly higher share of non-family households.

The prominence of non-family households in Davidson is not due to a large share of young adults living with roommates, as may be the case in Charlotte. Instead, it is primarily middle-aged adults (35-64) and seniors (65+) living alone, which comprise 42% and 28% of Davidson's non-family households, respectively. Only 21% are individuals under age 34.

Household Type  
2000 to 2011-2015



**Since 2000:** There have been small shifts in this distribution over the past 15 years. In 2000, married couples with children were the most common household type in Davidson, with non-family households and married couples without children a close second and third. Since then, the share of married couples has declined, and the share of non-family households has increased slightly. As a result, non-family households are now the most common.

## Households by Type

2011-2015

	Married-couple with children	Married-couple without children	Other family with children	Other family without children	Nonfamily household
Davidson	28%	25%	8%	5%	32%
Cornelius	22%	27%	10%	3%	37%
Huntersville	35%	28%	6%	4%	27%
Mooresville	30%	24%	11%	5%	30%
Charlotte	19%	21%	13%	7%	40%

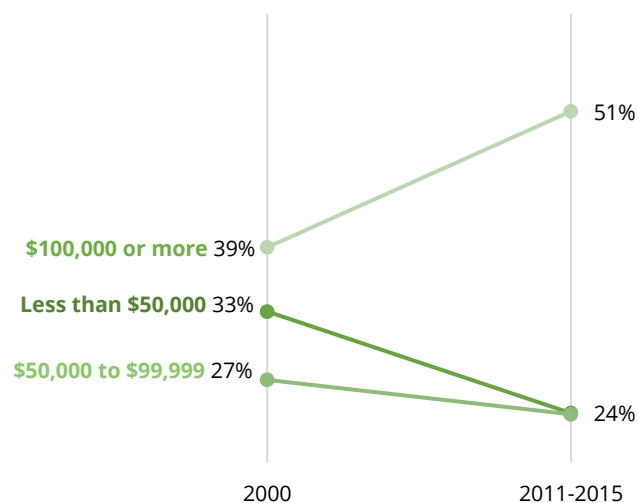
## Income

Davidson is an affluent community, not only compared to its neighbors but statewide. With a median household income of around \$105,000, Davidson is well above its neighbors Huntersville (\$90,000) and Cornelius (\$80,500). Even more, Davidson has the second highest median household income of Mecklenburg County zipcodes and the eighth highest of all North Carolina municipalities.

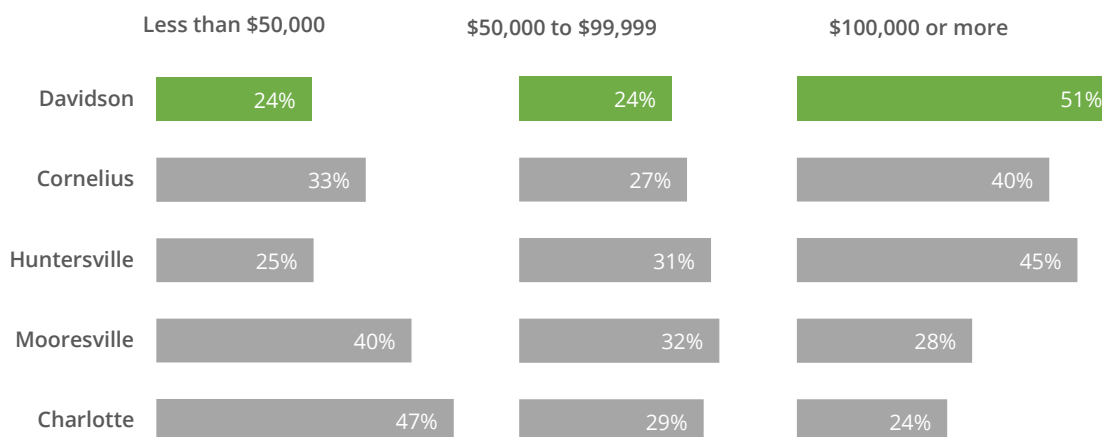
More than half of Davidson households earn over \$100,000 a year. However, Davidson still has its share of middle and lower income households. Around one-quarter earn between \$50,000 and \$100,000, and the remaining quarter earn less than \$50,000.

**Since 2000:** The share of households in Davidson with incomes over \$100,000 a year (not adjusted for inflation) grew from 39% in 2000 to 51% in 2015—some increase in this high-income group is to be expected due to inflation. However, when adjusting for inflation, real median income decreased in Davidson from an inflation-adjusted median household income of \$107,869 in 2000 to \$105,083 in 2011-2015.

Household Income  
2000 to 2011-2015



Households by Income  
2011-2015





# Employment

## METHODOLOGY

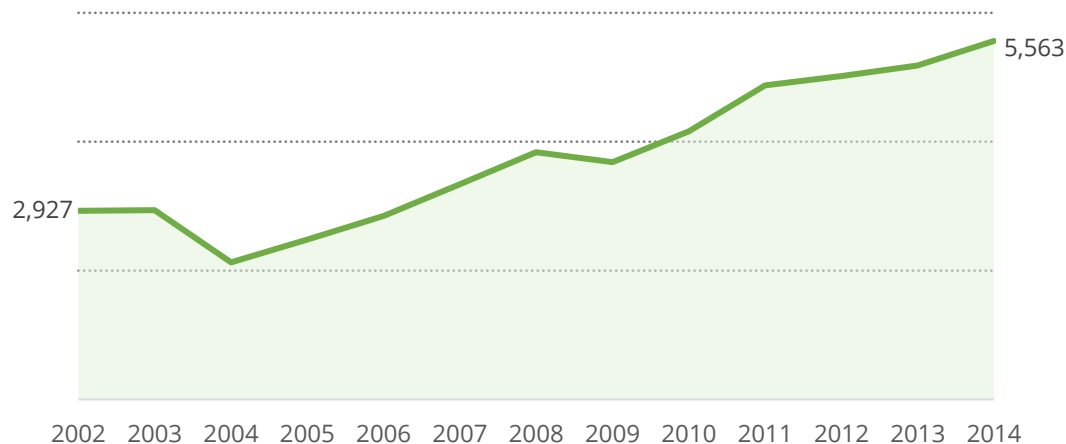
Data for this section come from two main sources. The first is the Longitudinal Employer-Household Dynamics (LEHD), a national dataset that provides detailed information about where people work and live. Produced by the U.S. Census Bureau, it is generated from state unemployment insurance reporting information. The LEHD captures wage and salary jobs covered by unemployment insurance (which account for about 95% of private sector wage and salary employment) but does not include informal workers or the self-employed. A worker's employment location is based on the physical or mailing address reported by the employer, which in some cases may not be the location at which an employee performs his/her work. Even with these nuances, this is the most comprehensive data set on work and residential location available to date.

In addition to the LEHD data, we obtained information from a sample of Davidson employers on where their employees live and what salaries they earn. The sample includes information from several of the town's largest employers including, the Town of Davidson, Davidson College, Davidson Elementary School, and MSC. Each employer provided basic frequencies of their employees by salary range and residential zip code. We then added all of the employer frequencies together to form the sample dataset.

## Who works in Davidson?

As of 2014, over 5,500 people worked at an establishment in the Town of Davidson, according to the Longitudinal Employer Household Dynamics (LEHD). Despite a slight dip during the recession, this number has climbed steadily since 2004 and has more than doubled in 10 years.

Total number of jobs in Davidson  
2002-2014



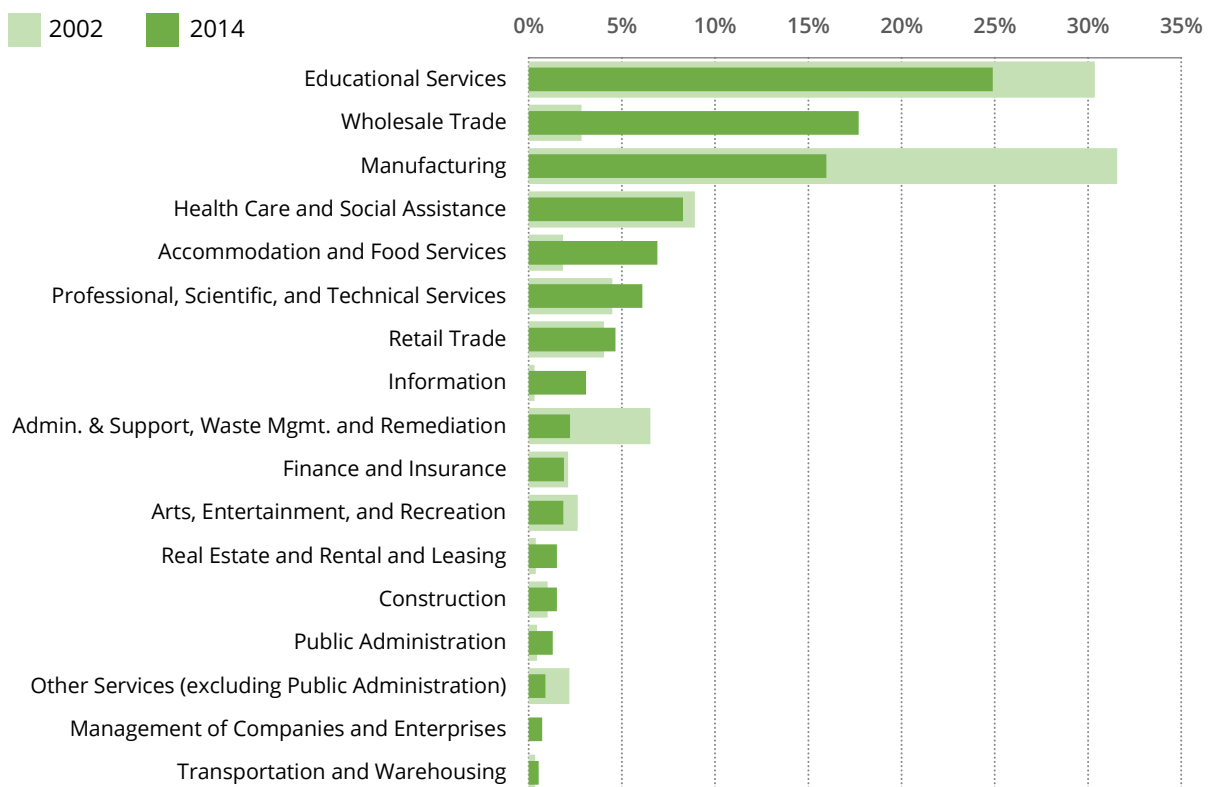
## Industry sector

Davidson workers are employed across a variety of sectors. As of 2014, the largest sector of employment in Davidson was educational services, which employs one quarter of all people working at an establishment located in Davidson. This is not surprising given the prominence of Davidson College and the presence of a number of K-12 schools in the Town. Wholesale trade and manufacturing are the next largest, employing 18% and 16% of the Town's workforce, respectively. The wholesale trade sector includes businesses that sell or resell products to other businesses but don't do any sort of processing themselves. The manufacturing sector includes businesses that transform raw materials into products and sell them at the same location, which spans a wide variety of

establishments from factories to bakeries to custom tailors.

**Since 2002:** This breakdown has changed in a few notable ways since 2002 (the first year of data available from the LEHD). The share of workers employed in educational services decreased from 30% in 2002 to 25% in 2014, and the share in manufacturing was essentially cut in half, falling from 32% to 16%. At the same time, wholesale trade grew dramatically, from 3% to 18%. This change is likely the result of Ingersoll-Rand moving its U.S. headquarters to Davidson in 2004, bringing administrative jobs to the existing manufacturing operation and shifting in industry classification from manufacturing to wholesale trade.

Employment by sector of Davidson workers  
2002, 2014



## Earnings

As illustrated in the previous section, Davidson is an affluent residential community. Davidson's workforce is also skewed toward higher individual earnings than the neighboring towns. According to the 2014 LEHD, over half of those who work at an establishment located in Davidson earn \$40,000 or more a year, compared to 41% and 42% in the surrounding towns. However, there is still a sizeable group of Davidson's workforce that is on the lower end of the earnings spectrum. One quarter of Davidson workers earn between \$15,000 and \$40,000 a year, and 22% earn less than \$15,000, which is essentially a full-time minimum wage job.

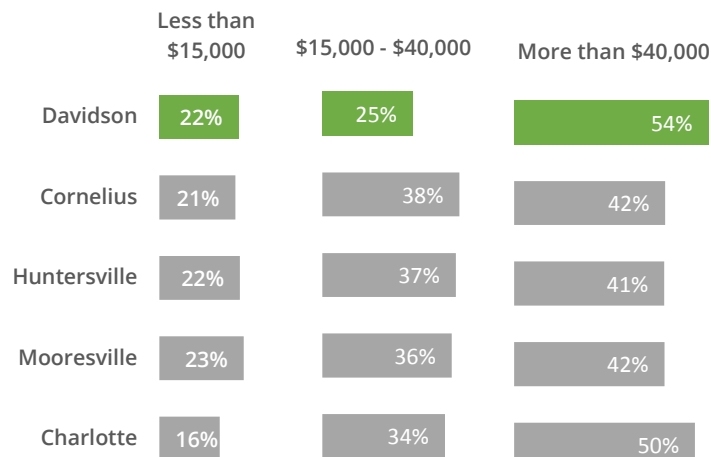
These earnings categories are admittedly broad, but they are the only ones available from this data source (LEHD). It should also be noted that these amounts reflect individual earnings and say nothing about the earnings of other household members, which could amount to significantly higher household income.

## Residential location

Most people either live or work in Davidson but not both. Of the approximately 5,600 people who work at an establishment in Davidson (and are captured in the LEHD dataset), only 8% also live in the Town. This phenomenon is not unique to Davidson, as the nearby towns also have small percentages of individuals who work and live in the same municipality, but the overlap in residence and workplace is the smallest in Davidson.

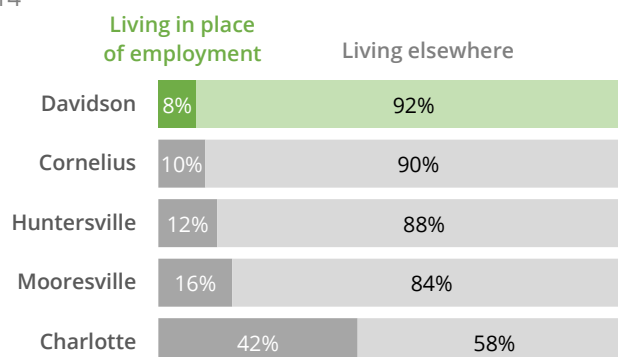
### Workers by Earnings

2014



### Workers by place of residence

2014

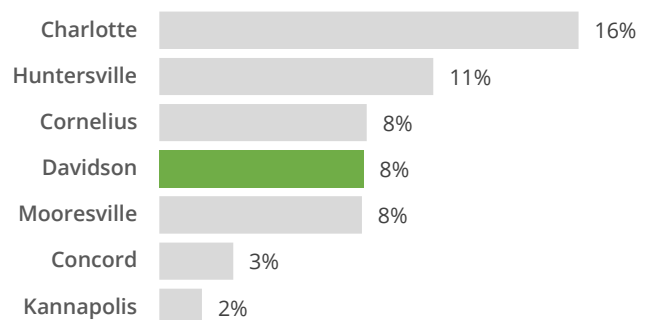


Although few people both work and live in the Town, the majority of individuals who work at an establishment in Davidson live within 25 miles of the Town. About 40% live less than 10 miles away, primarily in Huntersville, Cornelius, and Mooresville, and a few in the western edge of Concord. Another 27% live 10 to 24 miles away, primarily in Charlotte, with smaller concentrations in Concord, Kannapolis, and the midsection of Iredell County. Of the remaining 24% that live further than 25 miles, the largest concentrations are in the Triangle and Triad areas, and the rest are mostly spread out across North Carolina and the surrounding states.

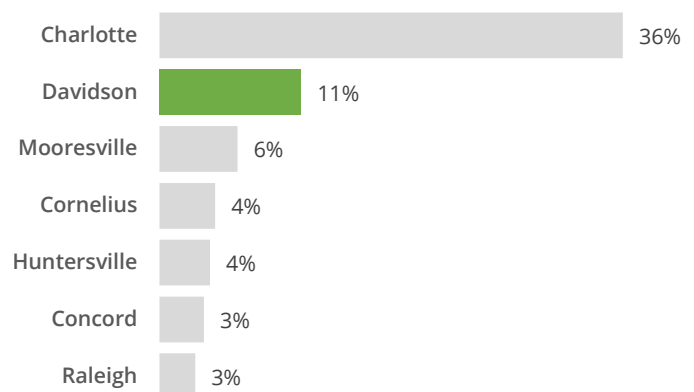
Looking at the inverse, there are also quite a few people who live in Davidson but work elsewhere. Of the approximately 4,000 Davidson residents who work (and are captured in the LEHD data set), only 11% work in Davidson, and 89% work elsewhere. About 20% are employed within a 10-mile radius, primarily in Mooresville, Cornelius, and Huntersville. However, 40% work between 10 and 25 miles away, mostly in Charlotte with the largest concentrations in downtown Charlotte and University City, which are both major employment centers within the city. The remaining 28% work over 25 miles away, mostly in the Triangle and Triad areas and the rest are mostly spread across North Carolina and the surrounding states.

In general, individuals who work at an establishment in Davidson but live elsewhere earn slightly less, and Davidson residents working elsewhere earn slightly more. The share of non-resident workers earning more than \$40,000 a year (53%) is smaller than that of Davidson residents, and the share of non-residents working in Davidson earning less than \$15,000 a year (21%) is larger than Davidson residents who work elsewhere. This could suggest that some who work at establishments in Davidson cannot afford to live in Davidson and must live elsewhere.

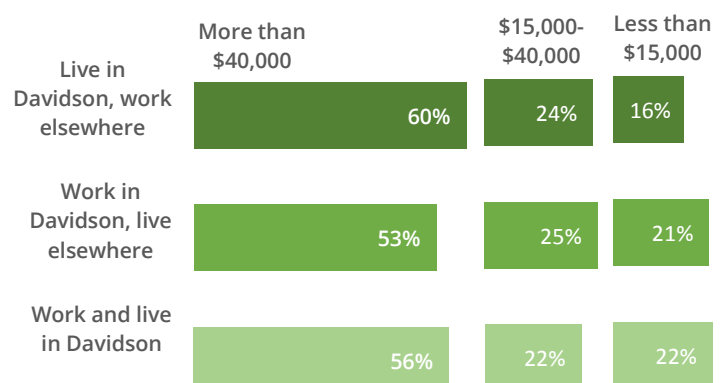
Davidson workers by place of residence  
2014



Davidson residents by place of employment  
2014

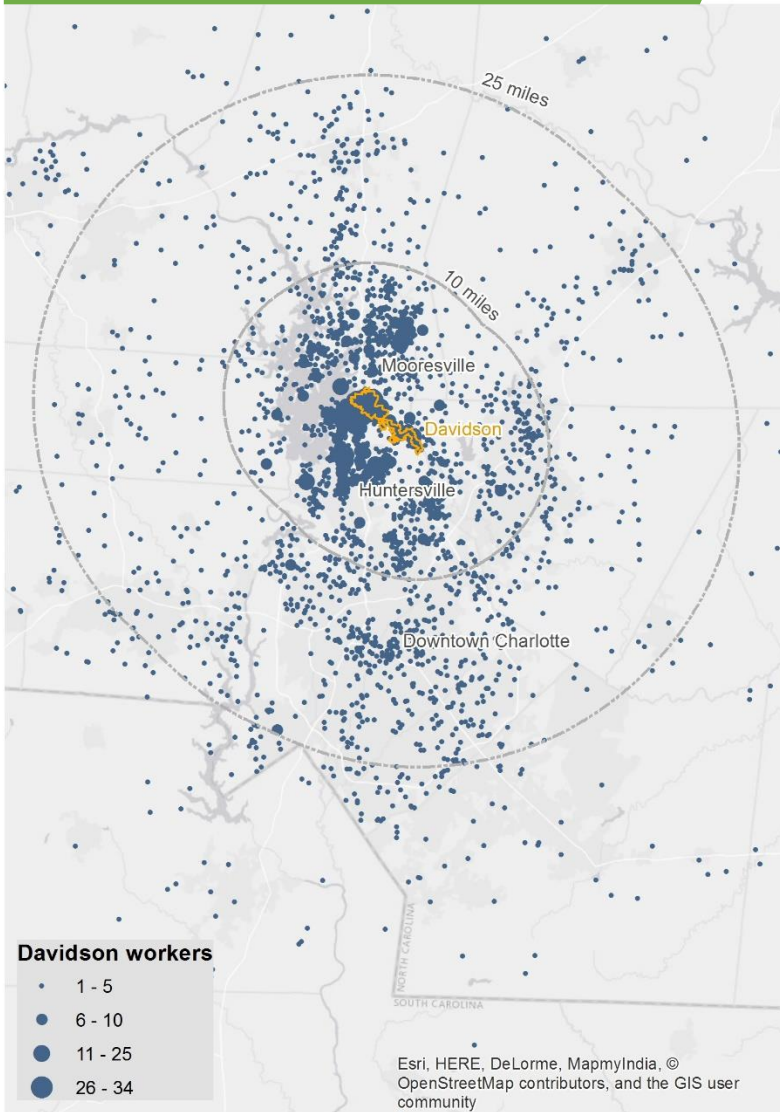


Workers by Earnings and Residence  
2014

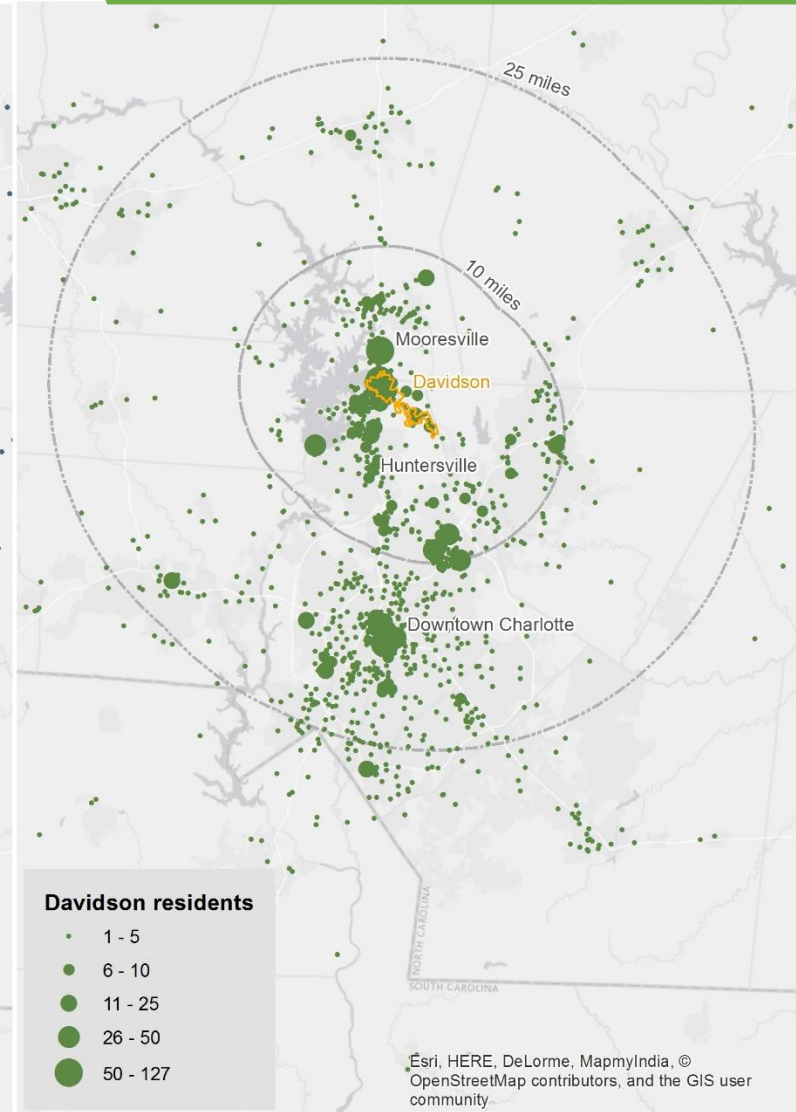




## Where people who work in Davidson live 2014 LEHD Data



## Where people who live in Davidson work 2014 LEHD Data



## Sample of local employers

A sample dataset of employees at a handful of the largest employers located in Davidson provided similar information as the LEHD but is more recent and came directly from the local employers.

The dataset includes a total of 1,405 employees. A higher proportion of these employees live in Davidson than the more comprehensive LEHD data. However, this could be a reflection of the small size of the sample and the nature of employers included in it. These employees are also higher earning than the LEHD dataset, with a larger share in the highest salary range and a smaller share in the lowest salary range. Two-thirds of employees in the sample earn more than \$42,900, 27% earn \$16-\$42,900, and 8% earn less than \$16,100.

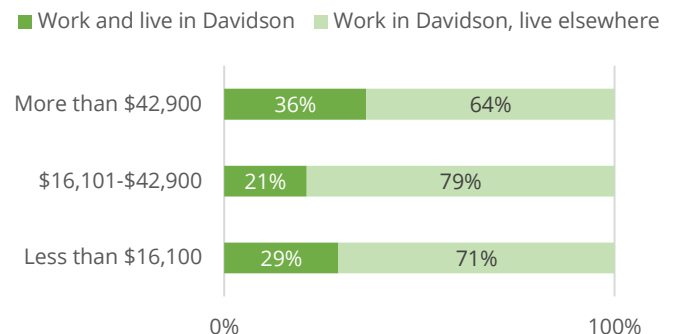
## Local employer perspectives

In addition to key informant interviews, which are presented later in this report, interviews were conducted with representatives of the four local employers included in the data sample. These interviews provided a unique perspective about housing options for their employees.

For all but one employer, having their employees live in Davidson was not a significant priority. They understand that for most of their employees, living in Davidson isn't really an option. Housing is very expensive; therefore, people look elsewhere for more affordable options. However, as all four employers noted, "Davidson is not an island". Their employees live up and down I-77 from Center City Charlotte to Exit 36. According to these employers, there is more than an adequate supply of housing

Still, these data show a similar trend in that higher income employees are more likely to live in Davidson and lower income employees more likely to live elsewhere. Thirty-six percent of those who earn more than \$42,900 live in Davidson, while only 21% of those earning \$16,101-\$42,900 and 29% of those earning less than \$16,100 live in Davidson.

Data from sample of local employers  
2016



units at various price points in the vicinity of Davidson.

The other important observation made by the employer representatives is the lack of diversity among the Town's residents. When trying to attract diverse employees, the lack of diversity in Davidson often results in the potential employees feeling uncomfortable living in the Town. The primary selling point to many of these potential employees is the close proximity to Charlotte where there are more diverse lifestyle options.

Most of the interviewees believed that housing affordable to their lower-level and mid-level employees would attract some to move to Davidson. However, no one thought this would be a large number.



# Housing Inventory

## METHODOLOGY

Data for this section primarily come from the Mecklenburg County tax parcel dataset as of August 2016. This dataset is maintained by Mecklenburg County Land Records Management and GIS departments. It includes physical and legal attributes for all parcels in Mecklenburg County. The numbers for Davidson and the other municipalities include the ETJ as well as the official boundaries.

Information on developments in the pipeline was collected from the Town's website and reflects the most current information available as of December 2016. This includes two developments (The Linden and William's Place) that have since been completed but are not yet reflected in the tax parcel data.

According to Mecklenburg County tax parcel information, there are about 5,300 housing units in the Town of Davidson and its extra-territorial jurisdiction (ETJ). The vast majority are located within the Town boundaries, while about 200 homes appear in the ETJ. This section provides a detailed snapshot of the Town's housing stock including the breakdown of units by type, age, and size as well as the geographic distribution of each across the Town. A neighborhood map created by the Town Planning Department was used to identify neighborhoods for these descriptions and is provided as an appendix to this report for reference.

## Housing type

The most common type of home in Davidson is a single-family unit. Sixty-four percent of Davidson's housing units are detached single-family homes. Another 8% are single-family attached homes (townhomes). The prevalence of single-family units in Davidson is similar to Cornelius, less pronounced than Huntersville and more so than Charlotte.

Single-family homes are found throughout the Town and ETJ. The only area with no single-family homes is the very western edge of Town in the Davidson Landing and Spinnaker Cove neighborhoods. While single-family detached homes are dispersed across

the Town, single-family attached homes (townhomes) are clustered in a handful of neighborhoods. Most are found in the Davidson Gateway, Davidson Bay, St. Albans, and Summers Walk neighborhoods. There are only a handful of mobile homes, mostly in the ETJ.

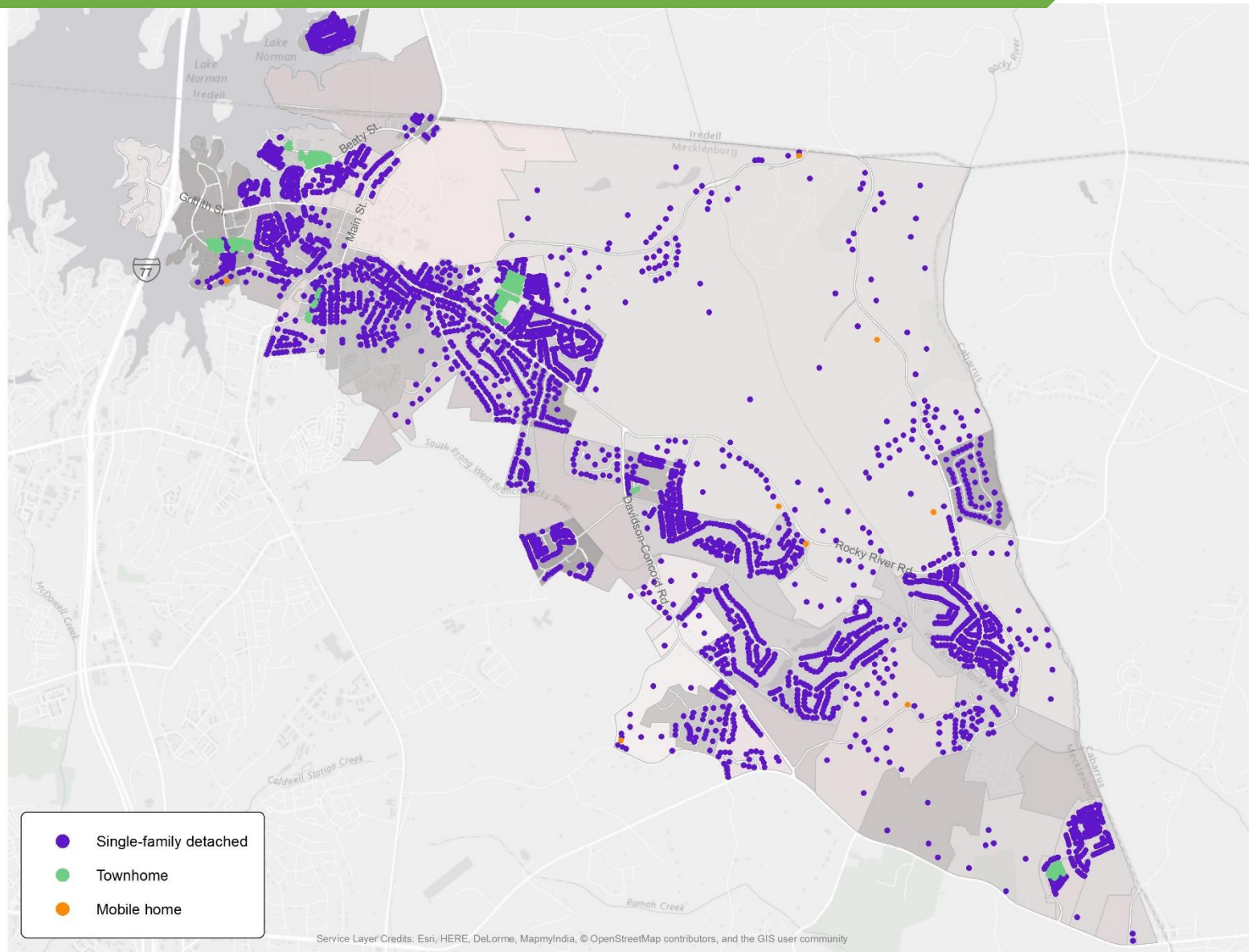
Condominiums are the most common type of multi-family housing in Davidson, accounting for 16% of the Town's housing units. This is similar to Cornelius but more prominent than Huntersville and Charlotte. Davidson has fewer apartments than the neighboring jurisdictions, with apartments comprising only 6% of the Town's housing stock, compared to 15% and 16% in Cornelius and Huntersville and 28% in Charlotte. The remainder of housing units in Davidson are duplexes/triplexes (2%) and assisted living facilities (4%).

Unlike single-family housing, multi-family housing is concentrated in one part of Town; nearly all of the units are located to the west of Main Street. Condos are mostly clustered in neighborhoods near the lake, including Davidson Landing, Harbour Place, Spinaker Cove, and Davidson Gateway. Apartments are found primarily in the Davidson Gateway, the Lakeside, and Oak Hill neighborhoods. Clusters of duplexes/triplexes appear in the West Side, North Main, and Old Town neighborhoods, as well as The Pines.



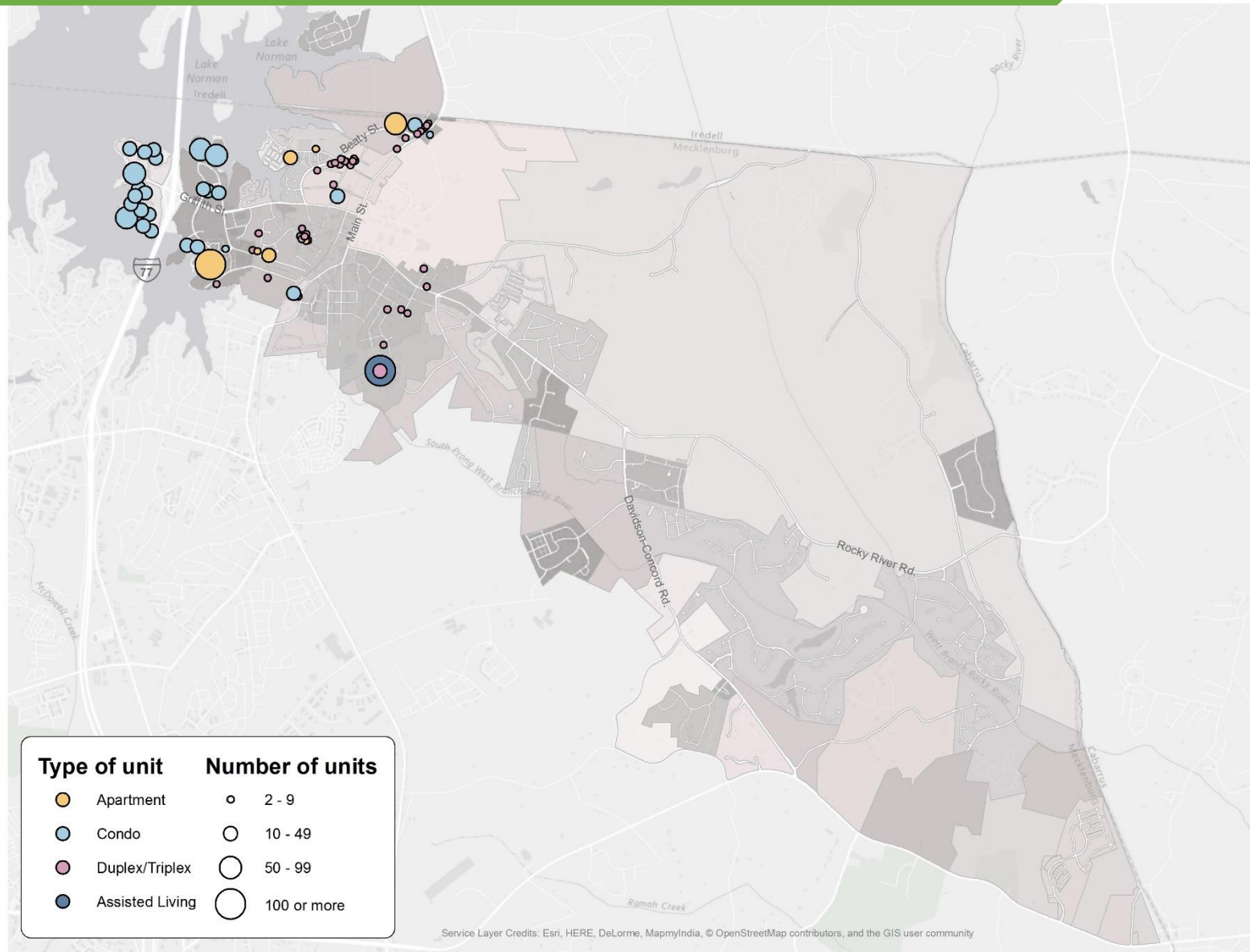
# Single-Family Housing Units

2016 Mecklenburg County and Iredell County Tax Parcel Data



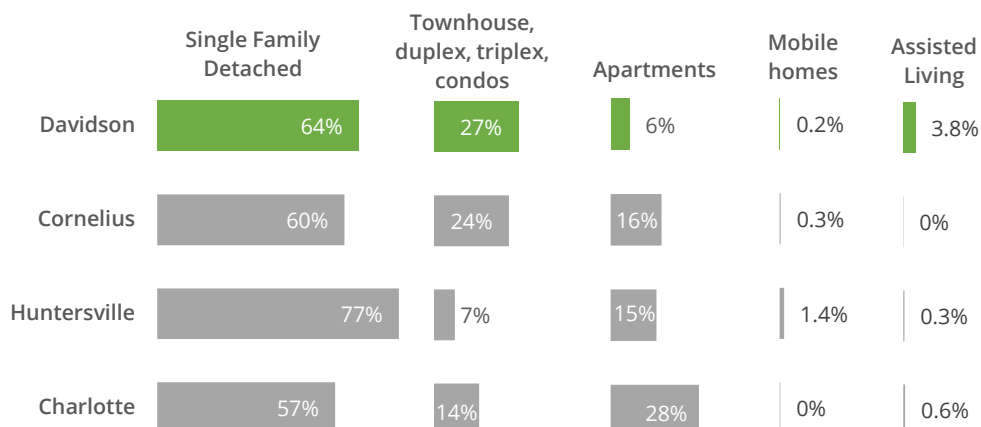
# Multi-Family Housing Units

2016 Mecklenburg County and Iredell County Tax Parcel Data



## Housing units by type

2016 Tax parcels



## Housing age

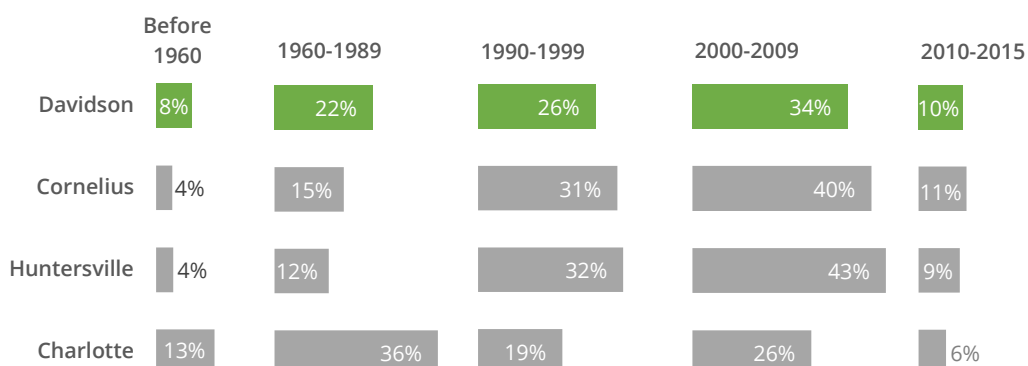
Davidson's housing stock ranges in age from just a few years old to over 100. Housing in Davidson is older than that of Cornelius and Huntersville, but younger than Charlotte's. The majority of homes in Davidson were built since 1990; 34% were built in the 2000s, 26% in the 1990s, and 10% since 2010. However, there is still a sizeable share of older homes, with 22% built in the 1960s, 70s, and 80s, and 8% built before 1960.

Older homes are mostly found in the core neighborhoods around downtown and throughout the ETJ. Newer homes are located mostly in neighborhoods further from downtown, in the

eastern part of Town as well as several pockets around the lake. Neighborhoods like McConnell, Cabin Creek, and Kimberly South were built mostly in the 1990s, as were the Woods at Lake Davidson and Page's Pond. River Run, and Runnymede were mostly built in the 1990s and 2000s, as was Lake Davidson Park in the western part of Town. Homes in St. Albans, Woodlands, Davidson Wood, Bradford and Davidson Gateway neighborhoods were built in the 2000s. The neighborhoods with the newest housing (built since 2010) are Bailey Springs, Davidson Pointe and Summers Walk. Clusters of new houses are also found in the West Side, River Run and Bradford.

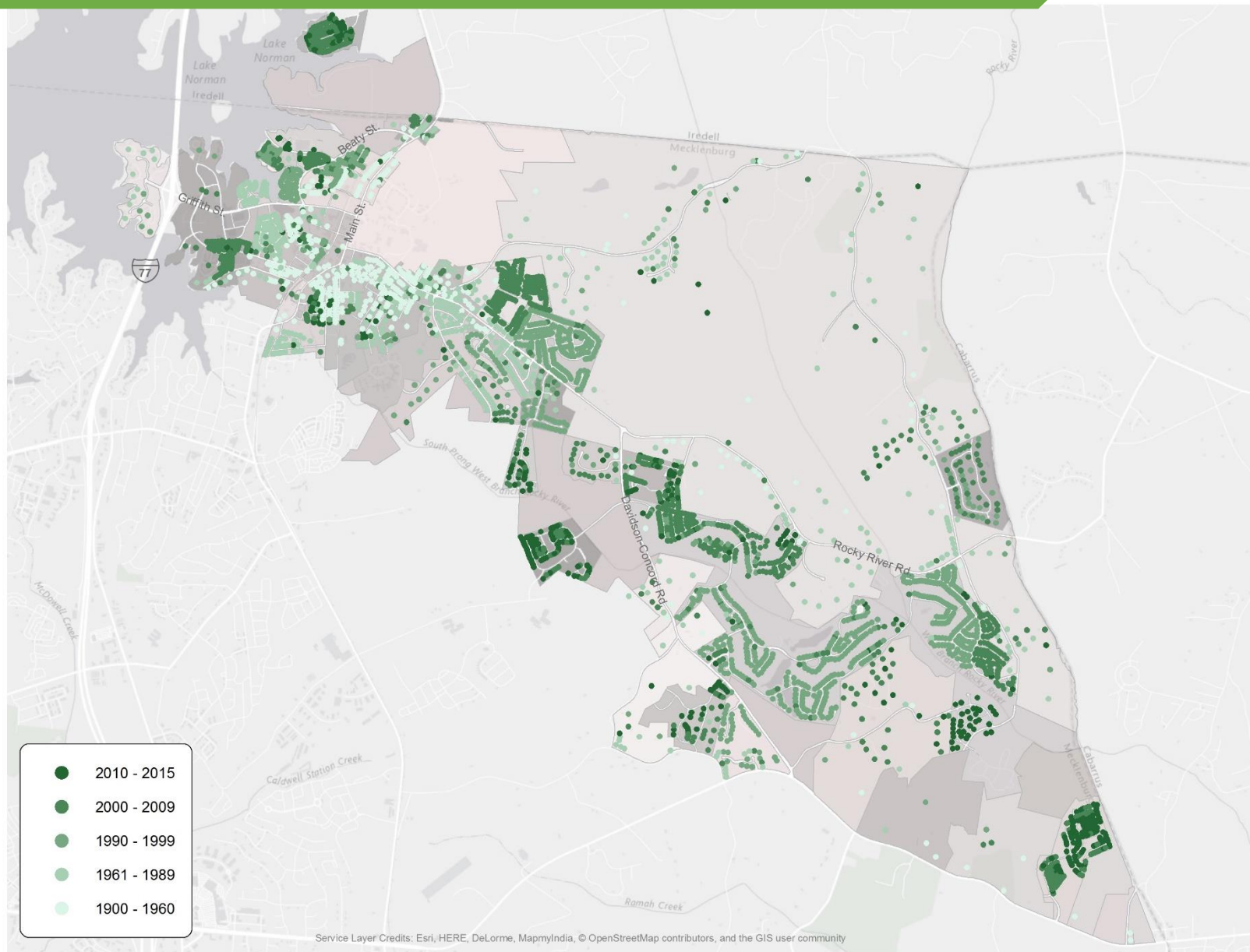
## Year Built

2016 Tax parcel data



# Year Built

2016 Mecklenburg County and Iredell County Tax Parcel Data





## Home size

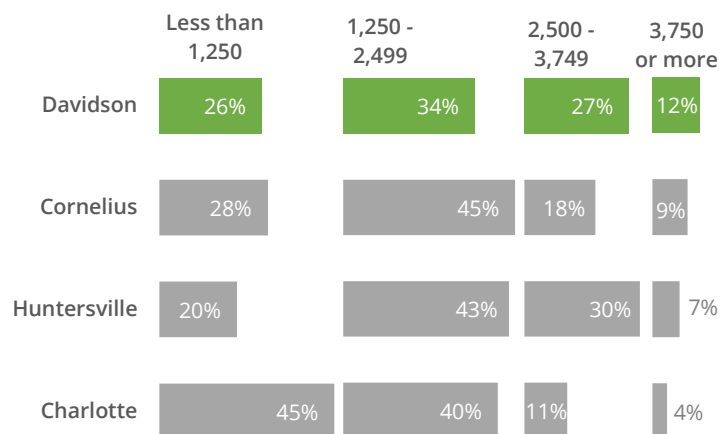
For the most part, homes in Davidson skew toward the larger side. The average home in Davidson is 2,440 heated square feet. This is similar to Huntersville, which has an average home size of 2,420 heated square feet, a bit larger than Cornelius (2,320) and Charlotte (1,940). Davidson also has a greater share of large homes (3,750 square feet or more) than Cornelius and Huntersville. Although the majority of homes in Davidson are between 1,250 and 3,749 heated square feet, 12% are more than 3,750 square feet, and 26% are less than 1,250.

The neighborhoods west of Main Street are predominantly made up of small (those less than 1,250 heated square feet) and mid-sized (1,250 - 2,500) homes. The neighborhoods to the south of Davidson College are mostly mid-sized and larger (2,500 - 3,750 square feet) homes with some large (more than 3,750) homes sprinkled in. The southeastern part of Town is populated mostly by homes over 2,500 square feet, with some mid-sized homes here and there, especially in Summers Walk.

The majority of homes in Davidson have three (42%) or four (32%) bedrooms. Another 17% have two bedrooms, and 8% have five or more. Only a handful are one-bedroom units. It is important to note that these numbers do not include apartment units, as this information is missing from the data source. So the shares of one- and two-bedroom units are likely higher than these numbers indicate.

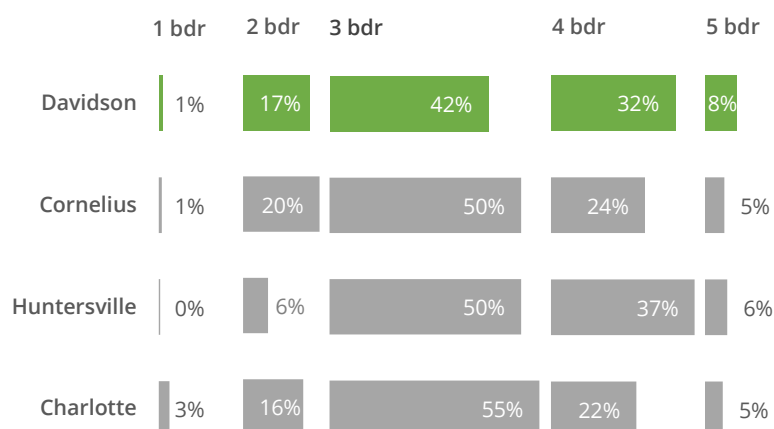
### Heated Square Feet

2016 Tax parcel data



### Number of bedrooms

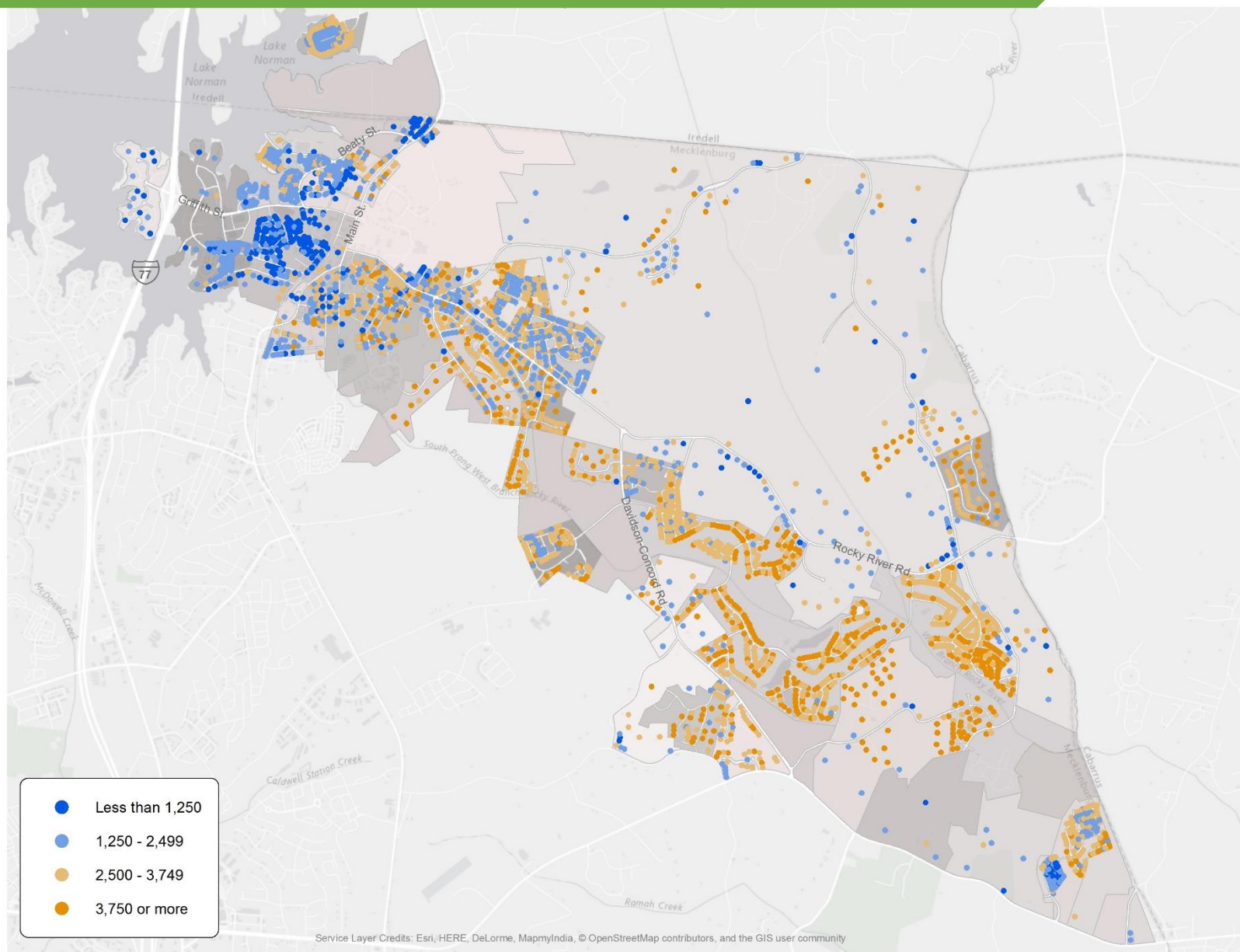
2016 Tax parcel data





Heated square feet per unit

2016 Mecklenburg County and Iredell County Tax Parcel Data



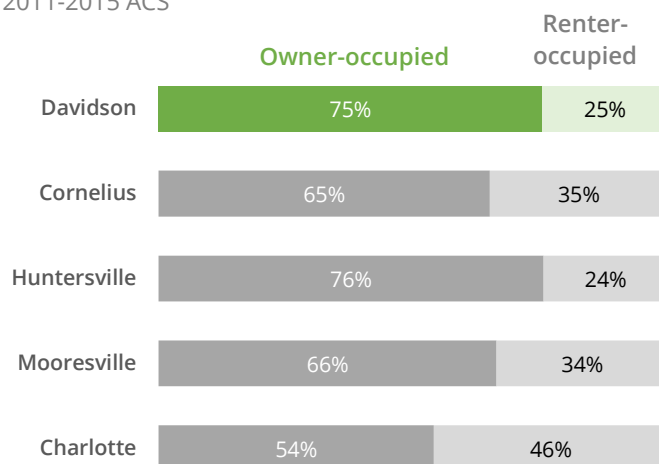
The neighborhoods west of Main Street are predominantly two- and three-bedroom homes, with a few one-bedrooms and a smattering of four-bedroom homes. The neighborhoods to the south of Davidson College are mostly three- and four-bedroom homes with some five-plus homes sprinkled in. The southeastern part of Town is populated mostly by four- and five-plus bedroom homes, with some three- and two-bedroom homes here and there, especially in Summers Walk.

## Housing tenure

The majority of Davidson's housing stock is owner-occupied. According to the 2015 ACS, three-quarters of homes in Davidson are owner-occupied and only one-quarter are rented. The prevalence of owner-occupied homes is similar to Huntersville and higher than Cornelius (65%) and Charlotte (54%).

Nationally, rates of home ownership have fallen since the onset of the Great Recession, and renting has become more prominent as mortgage lending standards have tightened and sales prices have recovered. Davidson has experienced this trend as well. The rate of homeownership in the Town fell from 79% in 2000.

Units by tenure  
2011-2015 ACS

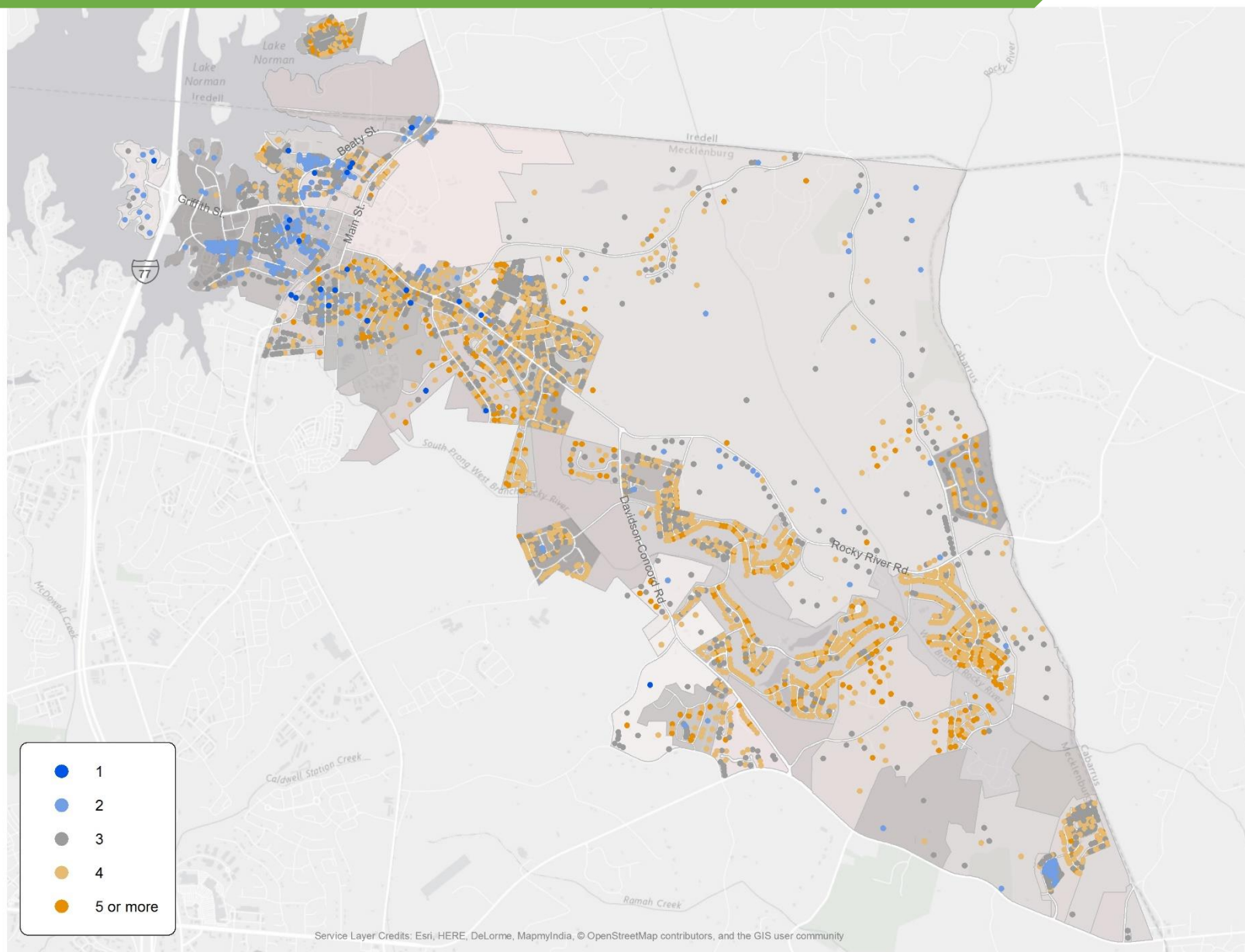


Housing Tenure  
2000 to 2011-2015



# Bedrooms per unit

2016 Mecklenburg County and Iredell County Tax Parcel Data



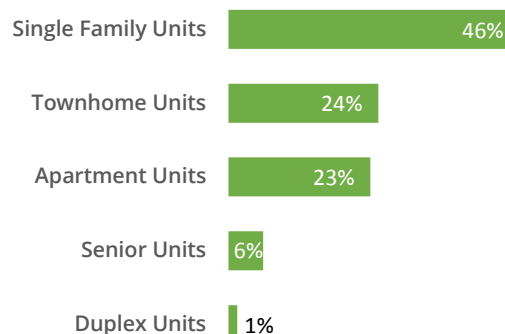
## Developments in the pipeline

In addition to the Town's existing housing stock, there are about 1,400 units slated for development in the near future<sup>4</sup>. Nearly half of the proposed units are single-family detached homes, about one quarter (each) are townhomes and apartments, and 6% are units designed for seniors.

In line with the existing patterns, multi-family developments are clustered in the neighborhoods around downtown, with the exception of about 150 units in the Davidson East development near the eastern edge, while proposed single-family units are scattered in the central and eastern parts of Town and ETJ. Townhomes, however, are interspersed with many of the single family units, which will result in a bit more diversity of housing stock in the eastern half of Town.

About 100 of these proposed units are designated to be affordable under the affordable housing ordinance. According to the information provided on the Town website, there are plans for affordable units in the Davidson Bay and the Villages of South Main developments, near much of the Town's existing affordable housing. However, affordable units are also planned for the Davidson East development, and more affordable units will be added to the Summers Walk neighborhood, which will increase the affordable housing stock in the far eastern part of Town.

Housing units in the development pipeline by type  
2016



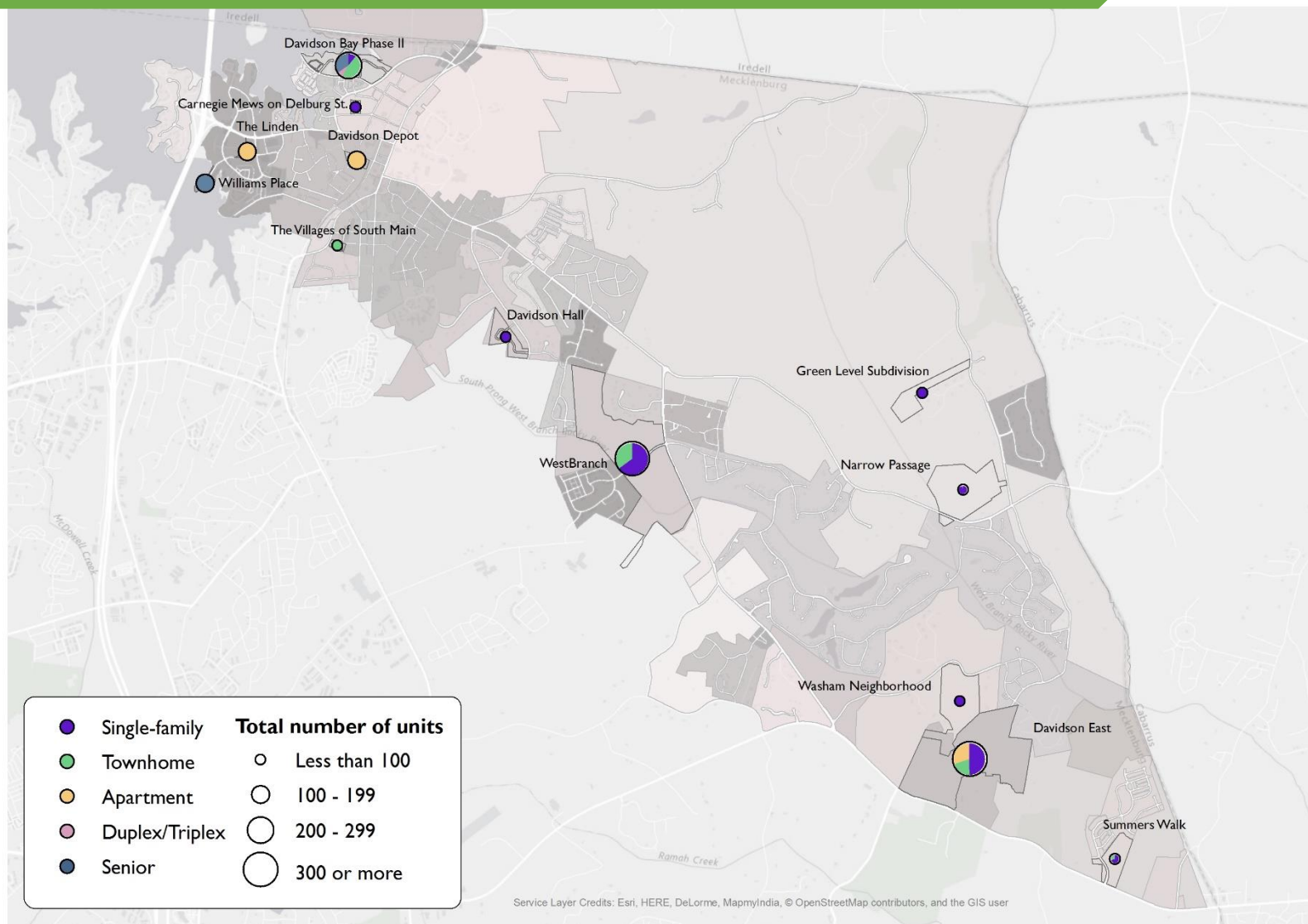
<sup>4</sup> This includes two developments (The Linden and William's Place) that have since been completed but are not yet reflected in the tax parcel data. They have been

included here to indicate their status at the time of our tax parcel snapshot.



# Developments in the Pipeline

Town of Davidson Planning Department, 2016





# Housing Affordability

## METHODOLOGY

Data for this section come from a combination of sources used in the previous sections, including the 2015 ACS 5-year estimates and Mecklenburg and Iredell County tax parcel datasets. This section also includes sales data from the Mecklenburg County Register of Deeds, apartment rental data from RealData, and information from multiple organizations operating affordable housing programs within the Town. Descriptions of how affordability is defined and measured are included in the body of this section. Sales figures do not include homes in the Davidson Pointe neighborhood, as comparable sales data from Iredell County were not available.

## Defining affordability

Many affordable housing programs utilize the U.S. Department of Housing and Urban Development's area median family income (MFI or HAMFI) limits for metropolitan areas to determine eligibility for affordable housing and to determine what housing price points would be affordable to low-income buyers. MFI is determined using the area median income for a metropolitan area and adjustments are made for household size. One of the limitations of using this measure is that it is at the metropolitan level and incorporates counties and communities that are very different in demographics from Davidson. The Charlotte-Mecklenburg metropolitan

area includes Cabarrus County, NC, Gaston County, NC, Mecklenburg County, NC, Union County, NC and York County, SC. Based on AMI, a 4-person household in 2016 would be considered low-income if it had an income between \$24,301 and \$33,500.

Housing is generally considered affordable if a household spends no more than 30% of their gross income on housing and utilities. This is a common affordability measure, however critics point out that net income would be more appropriate to use and that it should take into account a household's debt to income ratio. Additionally, many households have additional expenses such as daycare, medical costs, transportation, and other essential or fixed living expenses.

### Difference in AMI

**\$105,000**

Davidson  
median income

**\$67,000**

Charlotte-  
Mecklenburg area  
median income

**30%**

Spending no more than 30% of gross household income on housing and utilities is a commonly used measure of affordability, but is not without its critics

## Housing market

The Charlotte housing market, which includes Davidson, has seen tremendous growth since the Great Recession and has been gaining momentum in the past year or so. According to the Case-Shiller Index<sup>5</sup>, which tracks changes in the sales price of homes, Charlotte has surpassed its prerecession peak of 133.9 in August 2007 and in November 2016 was 143.5.<sup>6</sup> A recent report by the Urban Land Institute named Charlotte third in top U.S. housing markets to watch, behind only Dallas and Austin, TX. The report also notes the recent comeback of suburban growth and predicts continued growth for these areas. “More ‘suburban downtowns’ are

densifying, especially if they have a 20-minute transportation link to center-city jobs, Main Street shopping, and their own employment generators. These are typically in metro areas where close-in suburbs can both access center-city job growth and act as employment nodes in their own right.”<sup>7</sup>

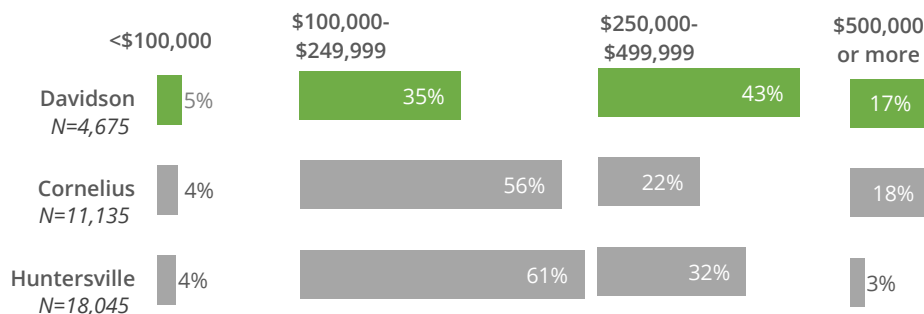
Davidson is a prime example of this trend. Its proximity to Charlotte and small-town charm (complete with a vibrant Main Street) have made Davidson a desirable suburb for many in the Charlotte region, a fact that is reflected in high property values and sales prices.

## Home values

Home values in Davidson are high, well above those in the neighboring towns. As of 2011 (the last countywide property evaluation), the median assessed home value in Davidson was about \$291,000.<sup>8</sup> This is \$80,000 more than that of Huntersville (\$212,000) and Cornelius (\$211,000). More than half of the homes in Davidson are valued at over \$250,000, and 17% are over \$500,000. About half of the homes in Cornelius and Huntersville are between \$100,000 and \$250,000, but only 35% of homes in Davidson fall in this range.

Within Davidson, lower value homes (under \$250,000) are found primarily in the neighborhoods to the west of Main Street and a few neighborhoods in the eastern part of Town, such as Bradford and Summers Walk. Higher value homes proliferate throughout the central neighborhoods (south of Davidson College) and the eastern half of Town. A few also dot the North Main and lakeside neighborhoods.

Home values  
2011



<sup>5</sup> Standards & Poor's publishes the Case-Shiller Composite 20 Index of repeat-sale housing prices monthly. The index is standardized to have a value of 100 in January 2000.

<sup>6</sup> <http://ui.uncc.edu/data/topic/housing>

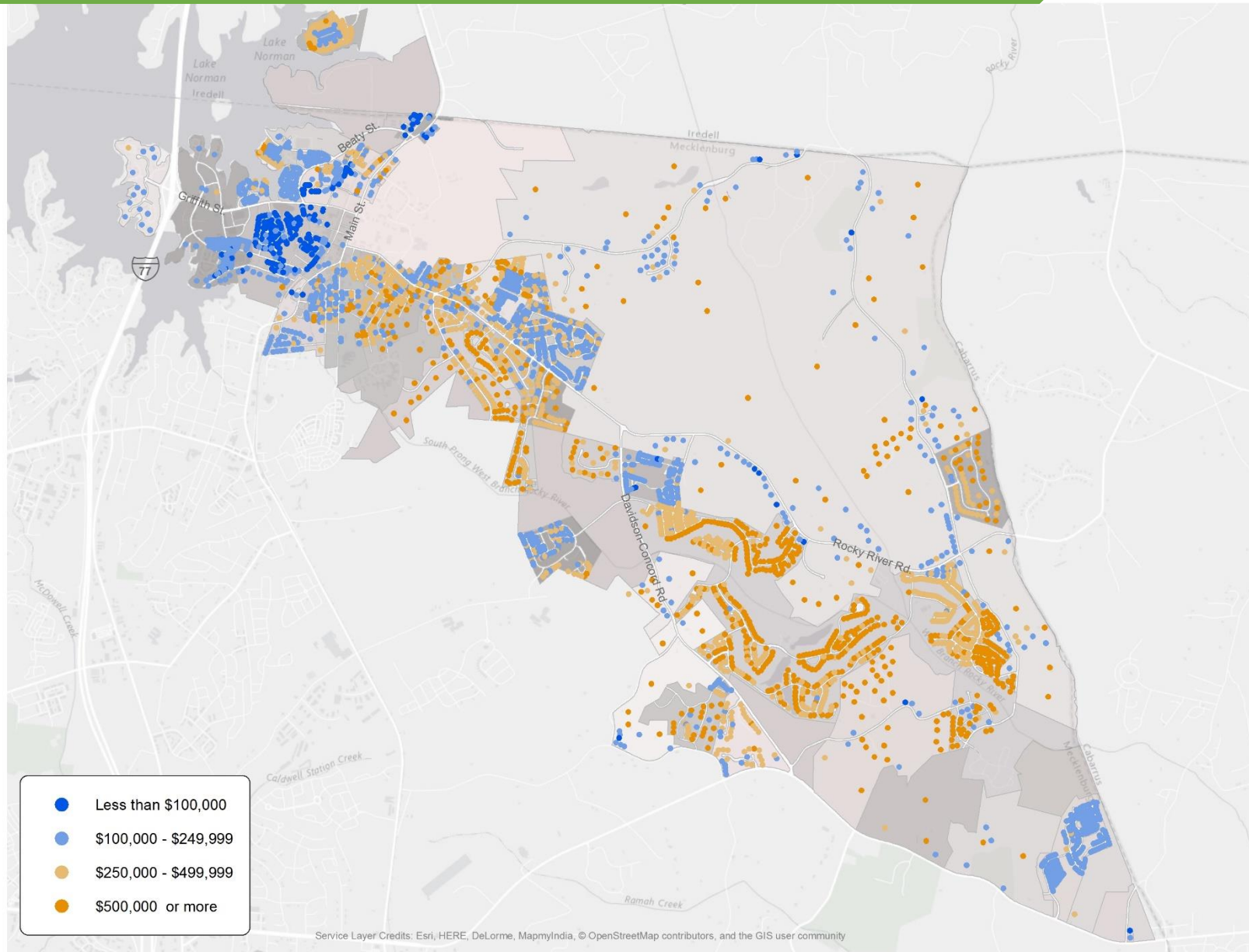
<sup>7</sup> <http://uli.org/wp-content/uploads/ULI-Documents/Emerging-Trends-in-Real-Estate-United-States-and-Canada-2016.pdf>

<sup>8</sup> These figures include single-family units, townhomes, and condos but not apartments or duplexes/triplexes.



# 2011 Assessed value per unit

2016 Mecklenburg County and Iredell County Tax Parcel Data



# Home sales

Although assessed property values are the most comprehensive data available, they are based on the 2011 market and likely underestimate the current home values. For a more current picture of home values, we examine recent home sales prices.

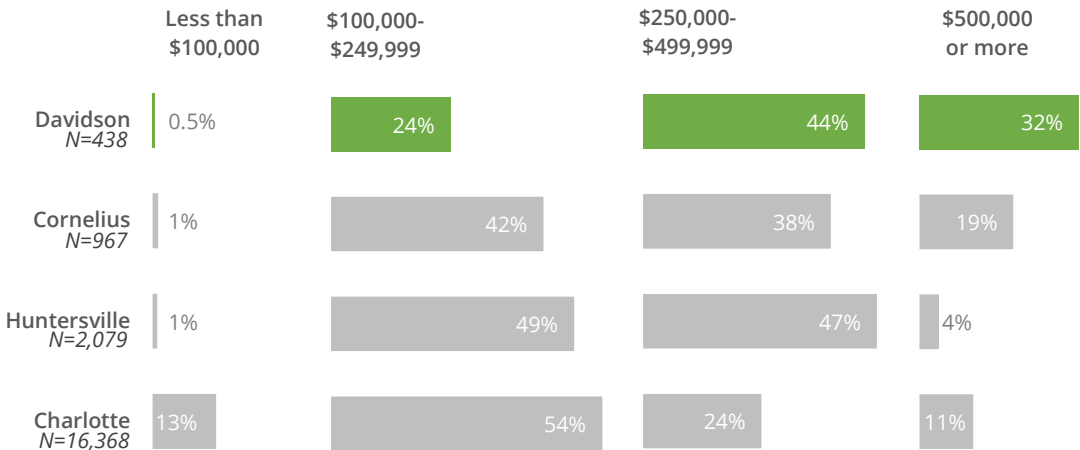
Similar to assessed values, homes in Davidson sell for substantially higher amounts than the surrounding areas. Looking at sales that occurred in 2015 and 2016, the median sales price for Davidson was \$385,500, more than \$100,000 higher than Cornelius (\$265,000) and Huntersville (\$250,000) and \$200,000 higher than Charlotte (\$185,000).<sup>9</sup>

Only one quarter (193) of the 435 homes sold in Davidson sold for \$250,000-\$499,999, compared to 40-

50% in the neighboring municipalities. Only two homes sold in Davidson for under \$100,000. At the other end of the spectrum, nearly one-third (139) of the homes sold in Davidson sold for \$500,000 or more, compared to 19% (182) in Cornelius, 11% (1,745) in Charlotte, and only 4% in Huntersville.<sup>10</sup>

Most of the lower priced homes sold in Davidson (under \$250,000) are found in the West Side, Davidson Gateway, and North Main/Delburg neighborhoods as well as Summers Walk. Clusters of homes sold for \$250,000-\$500,000 are found in the St. Albans, McConnell, and Summers Walk neighborhoods, among others. Homes selling for \$500,000 or more are found primarily in River Run and dotted throughout several neighborhoods in the central part of Town.

Home sales  
2015-2016 Sales

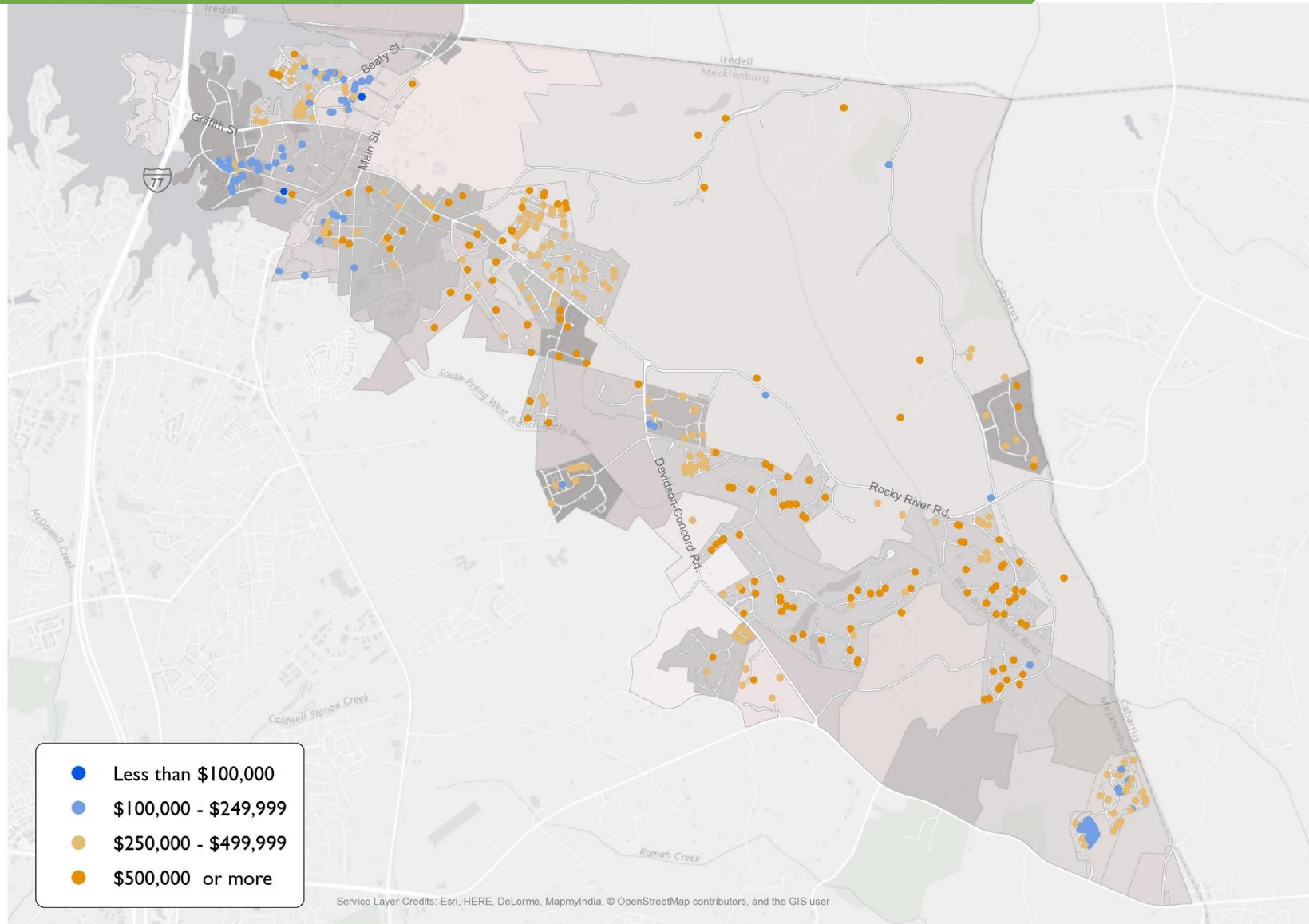


<sup>9</sup> These figures do not include homes in the Davidson Pointe neighborhood, as comparable sales data from Iredell County were not available.

<sup>10</sup> Cornelius had 967 homes sold, Huntersville had 2,075 homes sold and Charlotte had 16,175 homes sold.

# Recent home sales prices

2015-2016 Mecklenburg County Register of Deeds Parcel Sales Data



# Rental market

As the previous section showed, the rental market in Davidson is smaller than the for-sale/home owner market. Only one-quarter of Davidson households rent, and apartments comprise only 6% of the Town's housing units. However, this market is growing. Davidson has seen a slight decline in home-ownership rates, and there are a number of new apartment units that came online in late 2016 and several more in the pipeline.

The rental market is also more difficult to quantify, as comprehensive, timely data on rental units are hard to come by. While rental properties are included in the county's tax parcel dataset, they are not designated as such and information about rental rates is not provided.

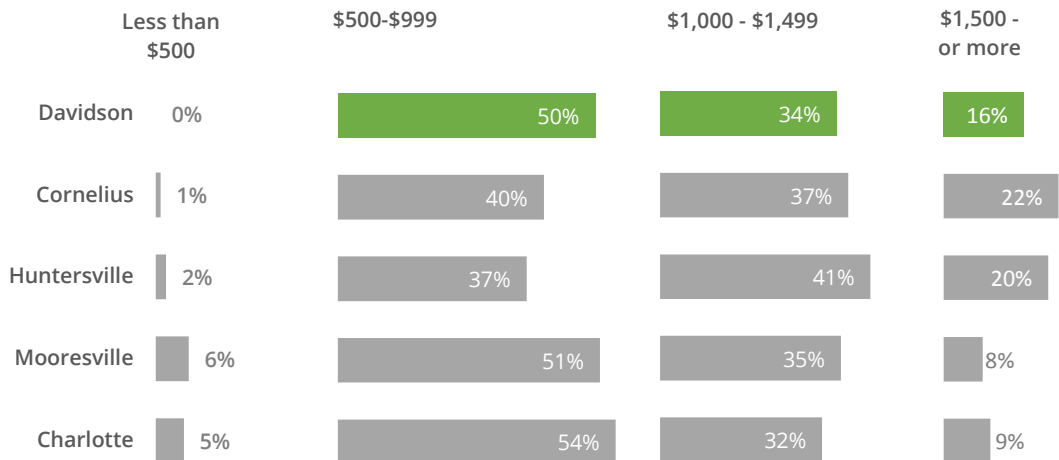
The most comprehensive data on rent prices available come from the American Community Survey, but the numbers represent information collected over a 5-year period (2011-2015). According to the ACS, rents in Davidson are higher than Charlotte but not as high as Cornelius and Huntersville. In 2015, the median gross rent in Davidson was about \$1,000, compared to \$926 in Charlotte, \$1,089 in Cornelius, and \$1,119 in Huntersville. Half of the rental units in Davidson rent between \$500 and \$1,000 a month, and only 14% rent for \$1,500 or more. No units in Davidson rent for less than \$500.

RealData's apartment market report offers more timely information than the ACS but is not as comprehensive, as it only includes information about apartments and only those complexes with 50 units or more. Still, data from this source show a similar trend. As of March 2016, the average apartment rent in Davidson was \$874, lower than that of Cornelius (\$1,084) and Huntersville (\$1,069). The majority (65%) of Davidson apartments rented for less than \$1,000 a month, while less than half did in Huntersville and Cornelius.

It should be noted that a large share of the Davidson apartments included in both data sources were subsidized (federally or otherwise), which would result in lower rents being reported. Both of these data sources do not include recently built complexes, such as the Linden, and do not reflect the transition of Lakeside from subsidized to market rate apartments.

For more current information, we can look at current listings on real estate websites like Zillow, Trulia, and Rent Jungle. Of course, these sites only include properties currently available to rent and not those already being rented and thus only present part of the picture. Rent Jungle reports the average listed rent for apartments in Davidson was about \$1,200 for December 2016. According to Zillow and Trulia, median listed rents in Davidson were about \$1,700 in December 2016.

Units by Gross Rent  
2011-2015



## Cost-burden

As described at the beginning of this section, spending no more than 30% of gross household income on housing and utilities is a commonly used measure of affordability. Households that spend more than 30% are considered housing cost-burdened and are in need of a more affordable place to live. Thus, cost-burdened households are often used as an indicator of need for affordable housing.

As of 2015, about 830 households in Davidson were cost-burdened. This includes 440 owner-occupied households and 390 renter households. Relatively speaking, renters are twice as likely to be cost-burdened than homeowners. Forty-one percent of renters in Davidson are cost-burdened, compared to 19% of homeowners.

The problem has worsened for renters in Davidson over the past 15 years, with the share of cost-burdened households rising from 31% in 2000. The share of cost-burdened homeowners, however, has remained largely unchanged.

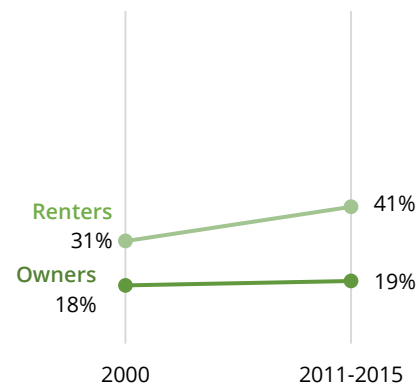
While cost-burden rates are higher for Davidson renters than those in Cornelius and Huntersville, they are lower than those in Mooresville and Charlotte. Cost-burden among Davidson homeowners is actually lower than the surrounding towns and Charlotte.

Lower income households are more likely to be cost-burdened than higher income, indicating a greater need for more affordable housing for lower income families.

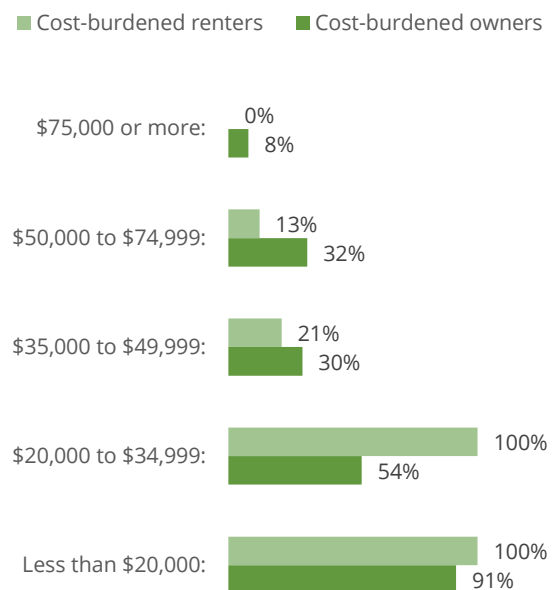
Virtually all renters with less than \$35,000 in annual household income in Davidson are cost-burdened, as are the majority of homeowners in this income range. About one-third of homeowners making between \$35,000 and \$75,000 are cost-burdened.

The majority (85%) of cost-burdened renters have household incomes under \$35,000 a year, and more than half are under \$20,000 a year. Cost-burdened homeowners, however, have higher household incomes with the majority making \$50,000 or more a year and 40% making more than \$75,000 a year.

Cost burdened households  
2000 to 2011-2015



Households by income and cost-burden  
2011-2015





## Affordability in Davidson

Through its affordable housing ordinance, the Town requires that developers include 12.5% of units as affordable housing for households at varying income ranges, or a developer can make a payment in lieu. The Town considers homes priced under

\$155,000 affordable for households making less than 80% AMI and homes priced under \$225,000 affordable for households making less than 120% AMI. Table 1 illustrates how those two categories translate to income levels by household size. For rental rates, the Town uses fair-market rents published by HUD, which are included below in Table 2.

**Table 1.** FY 2016 Charlotte-Mecklenburg Income Limits Summary

	1 Person	2 Person	3 Person	4 Person	5 Person	6 Person	7 Person	8 Person
<b>Extremely Low (30%)</b>	\$14,100	\$16,100	\$20,160	\$24,300	\$28,440	\$32,580	\$36,730	\$40,890
<b>Very Low (50%)</b>	\$23,450	\$26,800	\$30,150	\$33,500	\$36,200	\$38,900	\$41,550	\$44,250
<b>Low (80%)</b>	\$37,550	\$42,900	\$48,250	\$53,600	\$57,900	\$62,200	\$66,500	\$70,800
<b>Middle (120%)</b>	\$56,300	\$64,300	\$72,350	\$80,400	\$86,850	\$93,250	\$99,700	\$106,150

Source: U.S. Department of Housing and Urban Development. 2016. FY2015 FMR and IL Summary System. Retrieved from: [http://www.huduser.org/portal/datasets/fmr/fmr\\_il\\_history.html](http://www.huduser.org/portal/datasets/fmr/fmr_il_history.html)

**Table 2.** FY 2016 Charlotte-Mecklenburg Fair Market Rent Summary

	Efficiency	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms
<b>Fair Market Rent</b>	\$653	\$745	\$864	\$1,173	\$1,469

Source: U.S. Department of Housing and Urban Development. 2016. FY2015 FMR and IL Summary System. Retrieved from: [http://www.huduser.org/portal/datasets/fmr/fmr\\_il\\_history.html](http://www.huduser.org/portal/datasets/fmr/fmr_il_history.html)

### Assessed value

Based on the parameters outlined above, there are about 1,600 units (36% of single-family, townhomes, and condos) in Davidson with 2011 tax values that would be considered affordable for those with household incomes below 120% AMI. About 760 of those are affordable for households below 80% AMI, and 840 are affordable to households between 80% and 120% AMI.

The share of affordable units in Davidson is well below the neighboring towns. In Huntersville and Cornelius, a little over half of the homes have tax values that are affordable to 120% AMI households,

and 21% and 27%, respectively, are affordable to households at 80% AMI.

Much of the affordable housing for those under 80% AMI is concentrated in the West Side, Davidson Gateway, North Main/Delburg, and Summers Walk neighborhoods as well as several parts of the ETJ. For households between 80% and 120% AMI, clusters of affordable housing can be found in most of the neighborhoods around the lake as well as Terrace Heights, McConnell, St. Albans, and Summers Walk.

## 2016 Mecklenburg County and Iredell County Tax Parcel Data





As previously noted, assessed values are generally lower than actual sales prices. So these numbers are likely over-estimating the amount of housing that is affordable at these two income levels. However, the 2011 assessed values are the only comprehensive data on property values available at such a fine geographic scale.

## Home sales

For more recent but less comprehensive data, we examined home sales data. Looking at recent home sales in Davidson, the share of homes with prices that would be affordable to those making 80% or 120% AMI is even smaller. Of the nearly 440 homes sold in Davidson in 2015 and 2016, 19% were

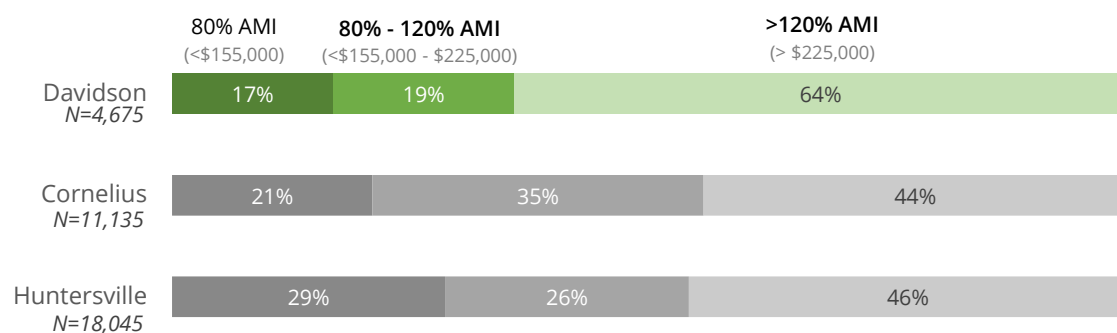
affordable to households at the 120% AMI level, and less than 10% were affordable to those at 80% AMI.<sup>11</sup> Although the availability of affordable homes for 120% AMI households was greater in Huntersville and Cornelius, they too had a limited number of homes affordable to 80% AMI households. Most of the affordable homes sold are in the West Side, Davidson Gateway, North Main/Delburg, and Summers Walk neighborhoods.

## Rent

To estimate the amount of affordable rental housing in Davidson, we looked to the fair market rents set by HUD and approximated the number of units that fall below each threshold in the two

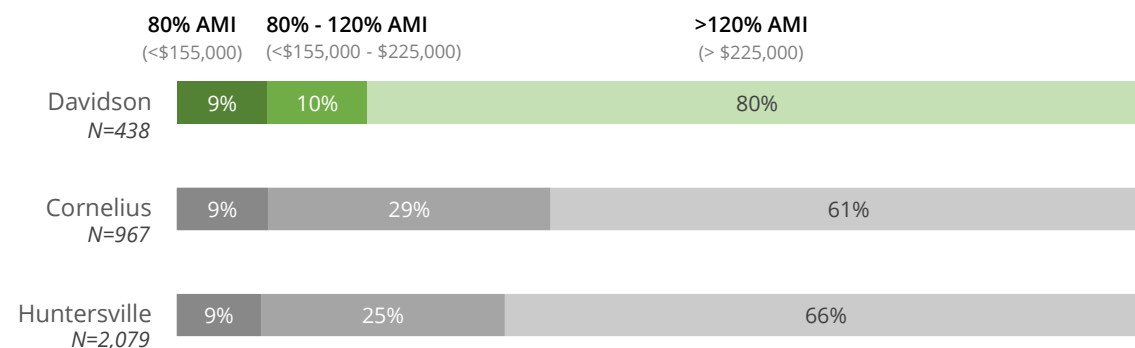
### Affordable assessed values

2011



### Affordable Sales Values

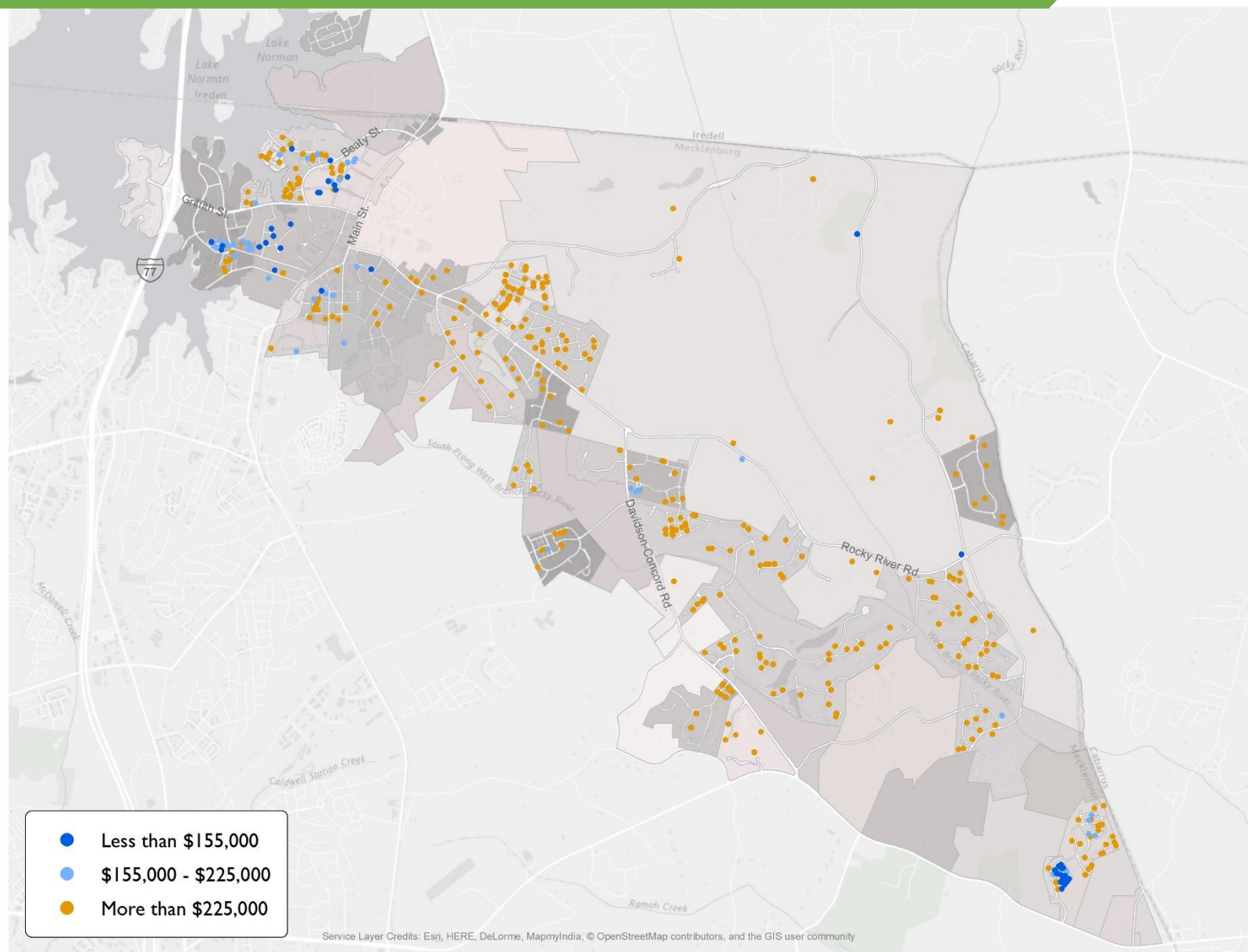
2015-2016



<sup>11</sup> These figures do not include homes in the Davidson Pointe neighborhood, as comparable sales data from Iredell County were not available.

# Affordability based on recent home sales price

2015-2016 Mecklenburg County Register of Deeds Parcel Sales Data



primary data sources: the ACS and RealData report. Based on this basic approach, approximately 280 units (29% of the rental units in Davidson) would be considered affordable, according to the 2015 ACS. This is actually higher than Cornelius (11%) and Huntersville (12%). Looking at apartments alone, the percentages are similar, but the numbers are smaller. According to the RealData report, 72 apartment units have rents below market rate, which accounts for about 28% of apartment units in Davidson are affordable, while only 10% and 13% of those in Cornelius and Huntersville are affordable.

Again, we must note the high share of subsidized apartment units in Davidson represented in the RealData report, which are made even more prominent by the small number of apartment units in Davidson in general, especially compared to Cornelius and Huntersville. The share of affordable rental units in Davidson is likely lower now than when these datasets were collected, with the addition of more market rate apartments in the past year.

## Affordable Housing Programs

There are a number of programs in Davidson that aim to help make housing more affordable. Together, these programs provide approximately 400 subsidized units. Here, the term “subsidized” is used to refer to units where the occupants receive any financial assistance toward housing costs, not exclusively federal housing assistance of which there is little in Davidson. Most of the subsidized units are located in the western and central neighborhoods, with a few clusters in the eastern part of Town in the Bradford and Summers Walk neighborhoods.

### Town Affordable Housing Ordinance

As of the writing of this report, 73 affordable units have been built under the Town’s program. The largest number (30 units) are found in the Summers Walk neighborhood at the southeastern edge of Town. Another 15 are in the Davidson Bay neighborhood and 11 in Bradford. The remainder appear in small clusters in Walnut Grove/Davidson Springs, Harbour Place, South Main Square, and Davidson Gateway.

### Davidson Housing Coalition

Davidson Housing Coalition (DHC) is a local non-profit organization that seeks to “preserve and create affordable housing options and to prepare families and individuals for financial stability and homeownership.” DHC has built a number of

affordable units in Davidson, which include 18 apartment units and 12 other rental units for households making less than 80% AMI, 32 rental units for households earning less than 50% AMI, 12 land lease properties, and 4 units for individuals with disabilities. The rental units are mostly located in the West Side neighborhood, and the land lease properties in Davidson Gateway. A few units are found in St. Albans as well.

### Davidson College housing services

Davidson College operates a housing program for faculty and staff of the College. This program has two components- a land lease program and a rental program.

Established more than 30 years ago, the Land Lease Program aims to make real estate purchase in Davidson more affordable for Davidson College faculty and staff. The program reduces the cost of the improved land from the sales price, which in turn reduces the down payment and monthly payments. The College currently has 94 land lease properties, which are found mostly in the Old Town and McConnell neighborhoods.

Davidson College also owns 68 rental units, which can be rented by new faculty and eligible administrative staff. Rental rates for these units are based on the appraised value of the house. These

units are located within a mile of campus and mostly appear in the Old Town and North Main neighborhoods.

### Habitat for Humanity

Our Towns Habitat for Humanity provides affordable housing support in Iredell and north Mecklenburg counties through two main programs—new homeownership and critical repairs. The new homeownership program provides low income families (30-60%AMI) with an affordable mortgage. In addition to income and residency requirements, families must commit to homeowner and financial education classes, and serve 400 “sweat equity” hours in order to participate in the program. There are 22 Habitat homes in Davidson, most of which are located in the West Side neighborhood, as well as a cluster at the very northern edge of Town near the intersection of North Main and Beatty streets.

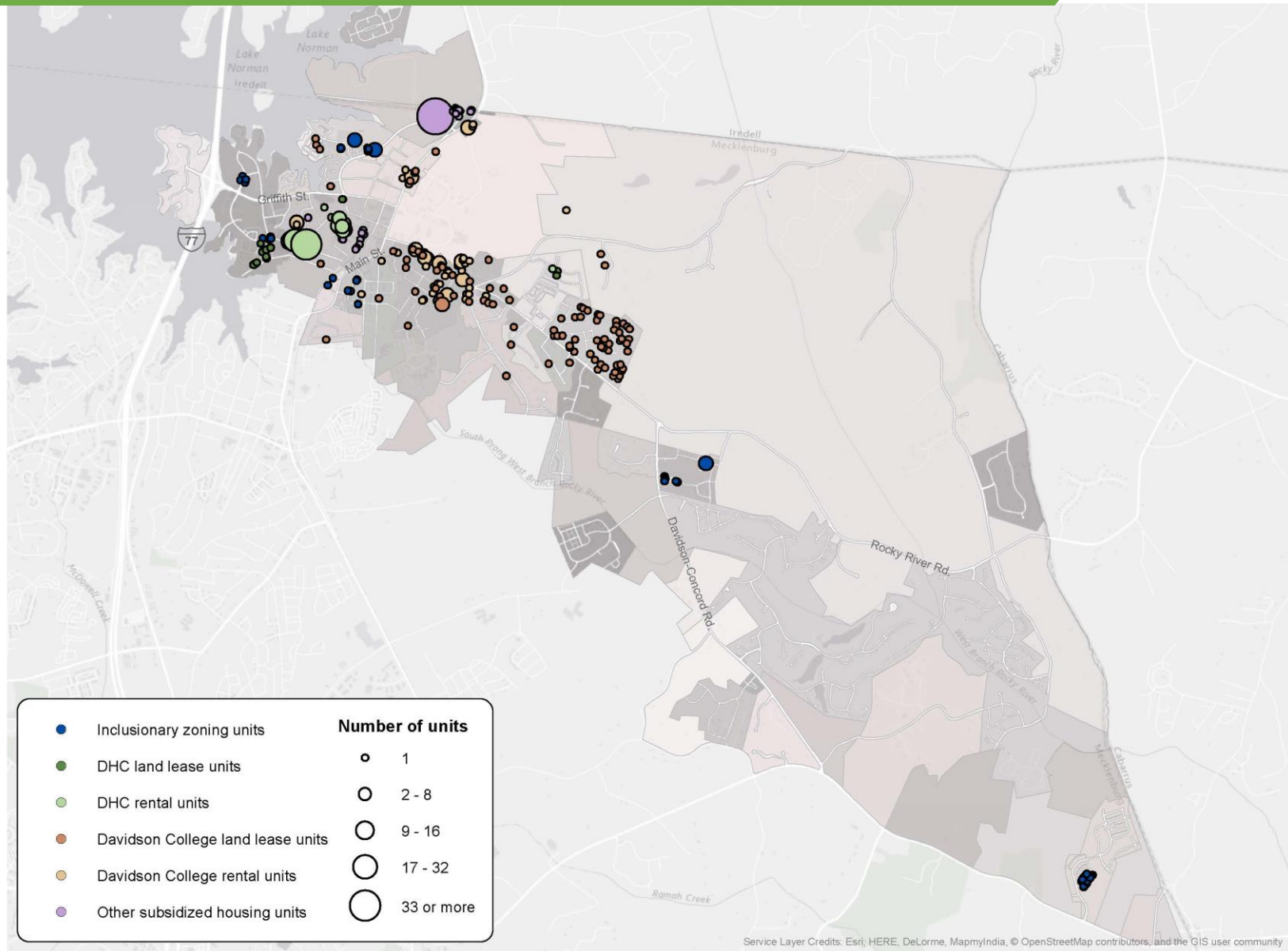
### Community Housing Partners

Community Housing Partners is a non-profit affordable housing developer that provides housing opportunities and related services to low-income people. Headquartered in Christianburg, Virginia, CHP operates more than 100 rental communities in Virginia, Maryland, Florida, and North Carolina, including the Oak Hill Apartments in Davidson.

Oak Hill Apartment Homes is a 72-unit federally subsidized complex at the northern edge of Town. Sixty-six of the units are rented to households at or below 60% AMI, and six units are rented to individuals and families with disabilities and incomes at or below 30% AMI.

# Subsidized Housing Units

Town of Davidson, Davidson Housing Coalition, Davidson College, Our Towns Habitat for Humanity, 2016 Mecklenburg County Tax Parcel Data



## Affordable Housing Gaps

It was not possible (or within the scope of this study) to calculate precise numbers of units needed at different AMI levels for a number of reasons. First, the available data sources were not comprehensive or consistent enough to provide reliable numbers. Some of the data sources often used to quantify specific affordable housing needs in large cities are not reliable enough for towns with relatively small populations like Davidson. Second, despite the fact that such numbers often appear to be objective, there is a great degree of subjectivity involved in determining them. Many of the factors that contribute to setting affordable housing goals for a community are dependent upon that community's core values. As will be seen from the key informant interviews, there is a need for greater clarity about the target populations the Town's residents hope to serve through its affordable housing program. To that end, we provide some information below that can inform such a process- information that identifies potential gaps in affordable housing for the various AMI levels.

### Very low income (>50% AMI)

There is very little housing in Davidson that is affordable to households making less than \$35,000 a year (an approximation of the HUD AMI limits for a family of 4). There are a number of subsidized units, however, designated for families and individuals in this income range, including

- 32 DHC rental units for households making less than 50% AMI,
- 66 apartment units in the Oak Hill apartment complex designated for families making less than 60% AMI and 6 for those less than 30% AMI, and
- 22 Habitat houses for households between 30 and 60% AMI.

About 550 households fall in this income range. Virtually all renters in this lowest income range (about 330 households) are cost-burdened, indicating they are in need of less expensive housing, as are the majority of homeowners in this income range (about 150 households), indicating a potential need of 480 units affordable to households with very low incomes.

### Low income (50-80% AMI)

Based on 2011 assessed home values, there are about 760 homes (single-family, townhomes, and condos) in Davidson valued at under \$155,000, which is affordable for households at the 80% AMI level. There are also 30 DHC rental units designated for families or individuals between 50% and 80% AMI.

There are approximately 400 households in Davidson that make between \$35,000 and \$50,000 a year (an approximation of the HUD AMI limits for a family of 4). Of these, about one-quarter are cost-burdened, which equates to about 35 renter households and 70 owner households, indicating a potential need of about 100 units affordable to low income households.

### Moderate income (80-120% AMI)

Based on 2011 assessed home values, there are about 840 single-family homes, townhomes, and condos in Davidson valued between \$155,000 and \$225,000, which is affordable for households between 80% and 120% AMI. There are also 73 units made available through the Town's affordable housing program for families and individuals in this moderate income range.

About 580 households have incomes between \$50,000 and \$75,000 (an approximation of the HUD AMI limits for a family of 4). Around 135 of these households are cost-burdened (20 renter- and 115 owner-occupied), indicating a potential need for 135 additional affordable units for moderate income households.





# Key Informant Perspectives

## METHODOLOGY

Approximately 40 key informants were interviewed individually or in groups during October and November 2016. The key informants included elected officials, Town staff, non-profits, the for-profit sector, developers, citizens, employers, and groups focused on housing. These key informants are not a representative sample of all Town residents or of all people knowledgeable about affordable housing. The interviewer used a protocol that included a few critical questions, but the tone of the interview was conversational. There were no recording devices used other than the interviewer recording notes as the conversation unfolded.

Needs assessments are data driven; however, the qualitative context of the data often adds important depth and breadth to the analysis. As a complement to the data portion of this housing needs assessment, the Town staff asked that key informant interviews be conducted with individuals knowledgeable about affordable housing efforts in town. In the analysis that follows, the primary findings are the topics, thoughts, ideas, and conclusions that were mentioned most frequently by the respondents.

## Defining Affordable Housing

For the most part, key informants either defined affordable housing as what they perceive as “workforce housing” or housing for very low-income households for whom the need is basic shelter. Workforce housing generally refers to housing for households that have a low- to moderate-income (60 to 120% AMI). On the moderate side would be teachers, police officers, fire personnel, assistant managers, etc. On the low side would be people in retail and hospitality work as well as those unemployed and older adults living on Social Security. It should be noted however, that people earning less than 60% AMI might be part of the workforce as well. Some also view “affordable

housing” as almost any price point that would attract owners or renters who are unable to find appropriate market rate housing at a price that is affordable to them.

Some stakeholders believed that all low-income households should be included in determining the need for affordable housing. However, a sizable component of the interview pool believed that the most important need for the Town to meet is workforce housing, and some were unsure about whether there was significant demand for units for very low- and extremely low-income households.

## Importance of Affordable Housing to Davidson

Approximately 15 years ago, the Town of Davidson developed a core values document. One of the core values identified was affordable housing. The discussions that produced the core values were spurred by the rapid growth that was occurring in Davidson and the concern that the Town was becoming much more homogeneous and a lot less diverse. Therefore, affordable housing was seen as a strategy to retain and grow diversity of the population.

The interviewees were asked their opinion of whether affordable housing was still a core value for the Town and for them. The overwhelming response was that it was, is and should be a core value. Even some who were on the record opposing affordable housing in their own neighborhood setting gave a positive response to this question. They felt that the policy is needed, but they had issues with and questions about the application of that policy.

However, this positive response was almost always followed with a comment that questioned the importance of affordable housing as a core value and support for the affordable housing policy among the citizens of the Town. Part of this thinking reflects NIMBYISM (Not in My Backyard) by neighbors in the small number of neighborhoods where affordable housing has been developed. Mostly though, it is based on the fact that the large majority of the population in Davidson today was not in the Town fifteen years ago when the issue was initially discussed. This perception was not so much that the opposition to affordable housing has grown, but that the general citizenry knows little or nothing about the policy and how it has been implemented.

Respondents were asked to give the interviewer their thoughts as to what the current policy of the Town is regarding affordable housing. The key informants were identified based on their knowledge of affordable housing in Davidson; therefore, as expected, most were able to describe in broad outlines what the affordable housing ordinance is and were aware of the affordable units that had been built in many of the subdivisions developed over the past 15 years. Their comments were complimentary of the Town's response to the need for affordable housing.

Most respondents knew that the application of the affordable housing ordinance had been threatened by lawsuits and the resulting payment in lieu option that is now available to developers regardless of development size.

Two concerns about the payment in lieu option were expressed: the geographic distribution of affordable units and for what the payment in lieu funds will be used. With regard to the geographic distribution of affordable units, stakeholders expressed concern that the payment in lieu funds do not have to be used to build affordable units in the same subdivision that generated the funds. Without this requirement, the development of affordable units could concentrate in certain parts of Town, such as the west side of Town, which already has a concentration of affordable units. To the question of how payment in lieu funds will be used, the respondents thought that the Town needs a plan that spells out how this money is to be used and how this use will enhance the affordable housing program.

Respondents frequently mentioned the importance of good design, which is evident in the affordable homes built in market rate subdivisions as a result of the Town's affordable housing program and the units built by Davidson Housing Coalition. The interviewees believe that good design helps affordable units successfully blend with market rate units.

## Barriers to Affordable Housing

Respondents mentioned many real and perceived barriers in developing affordable housing in Davidson. The NIMBY reaction is frequent in any discussion of introducing affordable housing into a community's inventory of housing units. The fear that almost always surfaces is that any unit of affordable housing mixed in with market rate housing will diminish the value of the market rate housing that is in close proximity to the affordable unit(s).

The most frequently mentioned barrier was the cost of the land. Without fail, each of the interview respondents—not just developers—mentioned the cost of land as a major constraint for Davidson's

affordable housing policy. The respondents, particularly those involved in some manner in the land development process, made note of how quickly the price of land has accelerated since the 2008 recession, with none expecting this cost curve to level off or go in the opposite direction.

Developers who have built on-site affordable units as part of the affordable housing ordinance uniformly claim they are personally subsidizing those units, and future units will require an even higher level of subsidy as the price of land continues to climb. The number of large subdivision developers in Davidson is small. The assumption by developers and others that large developers, in particular, will use the payment in lieu option is borne out by the very limited examples of large developments in Davidson. Large developers view the payment in lieu option as just another cost of development similar to impact fees and adequate facilities costs in other states. This cost of development is relatively negligible when spread across all the units in a large subdivision.

An unintended consequence of the affordable housing ordinance, according to developers, is that the developers have to subsidize the program by either building the required affordable units or using the payment in lieu provision, which can drive up the cost of market rate housing.

## Demand for Affordable Housing

Who needs the affordable units in Davidson and what kind of affordable units are needed? The quantitative portion of this study has already shed light on these questions, but the stakeholders provided meaningful context and opinions on these questions of demand as well.

The two topics mentioned most by the key informants were: 1) the need for workforce housing and 2) the need for more rental units. All of the informants had anecdotal stories of people who work in Davidson as teachers, government staff workers, Davidson College staff and faculty and public safety personnel who would like to live in the Town but are unable to do so because of the cost of housing. Informants, who follow the Davidson real estate market closely, agreed that the supply of housing units that can be bought for less than \$300,000 is limited. These informants also commented that there are very few housing units in Davidson currently on the market period, at any price point.

Until very recently, affordable rental options for these workers were mostly non-existent in the Town. The recent opening of the Linden, a relatively large rental complex for Davidson with some small units in the \$1,000 a month range, and the renovation of the Lakeside apartments has increased the Town's overall supply of rental housing. However, none of the units were designated affordable under the affordable housing ordinance, as it does not (and cannot legally) apply to apartments. Key informants noted that "starter homes" do not really exist in Davidson; therefore, renting becomes the only way to start out in Davidson as one works to build the resources necessary to make the move to homeownership in the Town or Lake Norman region.

## The Town and Affordable Housing

The Town of Davidson is one of only three municipalities in North Carolina that has an affordable housing ordinance. Therefore, unlike most municipalities in North Carolina, Davidson has a strong affordable housing policy, which is directly administered by the Board of Commissioners and the Town staff. The respondents applaud the Town's leadership in attempting to provide housing

affordable to a fairly broad range of income levels and to add diversity to a rather homogeneous population base. The key informants, however, had a few suggestions about the Town's continuing role in this policy area.

The strongest suggestion the stakeholders made is that the Town needs to have some "skin in the game." In response to the question about core values, one respondent commented that the Town may claim affordable housing is a core value, but in practice, it is not if the Town doesn't put some money into the effort.

The developer contingent of key informants uniformly believes that placing the total burden of producing affordable housing on them is unfair. In their opinion, for the policy to be effective, the Town and the development community must be partners and both invest in providing affordable housing.

When asked what revenue stream the Town should use to support affordable housing, most of the respondents recommended it be taken out of the general fund of the Town. Those who were more knowledgeable about the Town's fiscal situation added that the Town could set aside a part of the tax revenue to support affordable housing (one cent annually for example); use the payment in lieu money (however, most agreed that this really wasn't a contribution from the Town since it originated from developers); or issue a general obligation bond that earmarked some or all of the bond proceeds for affordable housing.

The key informants also commented about how the affordable housing program is administered. Many believe that the relationship between the Town (the policy maker) and the DHC (the nonprofit implementing at least a portion of the policy) should be strengthened, clarified and codified.

The predominant view among the respondents is that the Town should make and oversee the implementation of the affordable housing

ordinance, but the day-to-day operational aspects of the affordable housing program should be administered by a non-profit organization. This view is in part informed by a concern that the Town staff has dual functions of administering a program and enforcing and defending the same program.

Empowering an existing non-profit organization to play this role or forming a new one to meet the needs of the Town could address several other observations made by the key informants. Those interviewed viewed the DHC as the most likely agency for this task.

Another possible Town undertaking is to develop an information and education program about its affordable housing ordinance, which could help to address stakeholder concerns regarding the lack of clarity about and understanding of the program. The Town has already started to explore this and recently included this topic as a question on its on-line program to engage citizens on major topics of importance. It is important to find out if the citizens of the community and the Town leadership are on the same page regarding the importance of affordable housing.

## West Side Gentrification

Perhaps the most difficult issue facing the Town is how to respond to the changes that have occurred and will continue to occur in the West Side neighborhood. The West Side, which contains the historic African-American part of Town, is gentrifying, a process that has accelerated since the Great Recession. As previous sections of the study have shown, the West Side is also one of the few places in Davidson that has some naturally occurring affordable housing and is the area where most of the affordable units by the DHC have been built. As more developers opt for the payment in lieu option, additional units of affordable housing built with those funds are likely to be located in this same area because the cost of the land is cheaper and in close proximity to core amenities.

This situation raises some critical considerations for Davidson's affordable housing ordinance and how it is and will likely play out on the ground. Perhaps the most important question relates to the Town goal of having affordable units distributed across all sections of the Town. In those cases where developers built affordable units as part of their market rate subdivisions, this goal was met. Examples of this approach include Summers Walk, Bradford, the St. Albans community, and Bailey Springs. However, most of the affordable housing that has been built is on the West Side and almost all of the affordable housing for low-income households is located there. Therefore, meeting the distribution goal is becoming more and more difficult to do, particularly as a result of more developers opting for the payment in lieu approach.

A second consideration has to do with the existing housing. As the neighborhood gentrifies, the naturally affordable housing now in existence will be replaced by uses other than housing or by housing that is no longer affordable to the people currently living in the area. The Town will have to plan proactively around whether or not to preserve the existing affordable housing stock in this neighborhood. Respondents clearly recognized that finding solutions to these issues that satisfy both the Town and the residents living on the West Side will be a challenge.

## Suggested Tools

A suggestion that kept surfacing in these discussions was the possible development of a community land trust. Community land trusts are typically non-profit organizations that retain land for the benefit of the community. In the case of affordable housing, the physical property located on the land can be purchased by a homeowner while the land underneath is leased to the homeowner for a period of typically 99 years (referred to as a land lease). There are restrictions placed in the lease, which help to ensure that the property will remain affordable to subsequent buyers, ensuring long-

term affordability. Another tool of a land trust is land banking—a strategy where property is purchased and held for future affordable housing development. The DHC, which already administers such a program for some of its units, was suggested as an organization that could play an expanded role. However, additional administrative resources would likely be required for the DHC to play that role.

One of the most consistent observations throughout the interviews was that the land lease program managed by Davidson College seems to be a successful model. The College's program was developed initially to provide opportunities for College staff to live in Town. Over time and as housing values increased, the program evolved to serve mostly faculty instead of staff, and many of the units are now valued at over \$225,000. With the ownership units, Davidson College owns the land and the college employee owns the house and improvements. When the house is sold, Davidson College has the right of first refusal on the property. The College also has a number of rental properties that are used by staff and faculty, particularly faculty on short-term assignments. The study team made an effort to understand this program, and our conclusion is that it works well for the College and for the people who are able to take advantage of the program.

A series of issues come with land leases, particularly when used by a public sector entity. One of those is how long the deed restriction on the land lasts. Many of the programs have 99-year deed restrictions, which many respondents believed was too long. Another issue is the restriction on the amount of equity a homeowner can realize when the property is sold. Formulas are typically used to determine this amount, and they differ from one application to another. Some believe that it is "un-American" to limit the amount of equity a homeowner can realize from their investment, but these sentiments may merely reflect a lack of understanding of how such programs work. If the town were to consider creating a land trust, separate from existing non-profit entities, as part of

its affordable housing strategy, additional research into other programs is advisable.

## Older Adult Population

One population sector not mentioned directly in the narrative above is the older adult population. The lack of affordable rental opportunities for older adults has been an issue not only in Davidson but also across the country.

Davidson is fortunate to have a Continuing Care Retirement Community (CCRC) in Town. The Pines is a highly respected CCRC with well over 200 units, and many of Davidson's residents are or are planning to live there; however, as is true with all CCRC's, the Pines is affordable to a relatively small portion of older adults currently living in the Town.

Williams Place, which opened while this study was underway, is another option for older adults. Located at Exit 30, Williams Place is an age-restricted apartment complex for older adults with over 100 units. Unlike CCRCs or assisted living facilities, there is no upfront fee and there is no contract. Williams Place, however, is market rate with no designated affordable units, so it does not address the need for elderly housing at more modest price levels.

Older adults can seek subsidized housing through the DHC, but that is about the only thing available to those who need assistance paying for housing.

## Conclusions

The key informant respondents firmly supported affordable housing as a core value, appreciated the Town's efforts to increase the diversity of the population, applauded the outstanding design of affordable units, and believed that the Town should continue to pursue the development of affordable units. In terms of challenges facing Davidson's affordable housing program, key informants expressed the following: the rapidly increasing cost of land; uncertainty about the extent of support for affordable housing among the citizens of Davidson; the difficulty of distributing affordable units across the Town rather than concentrating them on the West Side; the need for more rental units and fewer for sale units of affordable housing, and the need to strengthen the Town's nonprofit affordable housing partners (DHC and possibly Davidson Lands Conservancy).

Among the recommendations offered by the respondents, many felt that the Town needs to be fully invested (skin in the game) in the affordable housing program. However, some respondents supported the concept of the implementation process being the primary responsibility of a nonprofit organization. Creating a new or expanded land lease option was supported; however, there was little consensus about the length of time that the original deed restriction should last and the best way for homeowners to realize some equity from their investment in the subsidized housing unit.



# Key Findings

This assessment sought to answer four key questions as an initial step in the Town's review of its affordable housing program:

1. What is the Town's current housing inventory and what are the emerging needs based on demographic shifts?
2. Who works in Davidson but can't afford to live there?
3. What are the housing needs in Davidson along a spectrum of affordability?
4. What are the complexities and context of developing affordable housing in Davidson?

What follows is a summary of our findings for each of those questions and some recommendations for how the Town might use this information to refine and sustain its affordable housing program for the future.

## 1. What is the Town's current housing inventory and what are the emerging needs based on demographic shifts?

### Current housing inventory

As the housing inventory section of this report showed in detail, Davidson's housing stock is skewed heavily toward single-family, owner-occupied units. Although the predominant structure is a single-family detached unit (64%), there are also a number of condos and townhomes, which provide some diversity of housing options for those with the means to buy a home. There are fewer options on the rental side—only a quarter (around 1,000 units) of all housing units in Davidson are currently renter-occupied. Most of these are single-family homes, and very few (about 300) are apartments.

### Demographic shifts

Like many communities within a 20-mile radius surrounding Charlotte, Davidson has experienced dramatic population growth and demographic change that are affecting the demand for housing.

#### *Continued population growth*

The Town's population has more than tripled in the past 25 years, and the land area has doubled. There is still ample open land within the Town's ETJ and some within the Town boundaries, which could be used for new development. However, the continued demand for housing in Davidson is likely to put greater focus on another of the Town's core values: open space preservation.

#### *Aging population*

Davidson's population is getting older. Since 2000, the percentage of the population between the ages of 45 and 69 has grown, and the percentage of those between the ages of 20 and 39 has declined. These trends raise some interesting questions in regards to the current housing inventory, its affordability, and the role that quality of life amenities play in influencing where people choose to live.

#### *Increasingly educated and affluent*

Although Mecklenburg County has become majority minority in terms of race, Davidson's population remains predominantly white. The Town's residents have also become increasingly affluent and highly educated. Davidson is the only town in the county where over half of its households earn more than \$100,000, and it is one of the wealthiest zip codes in Mecklenburg County. It also has more than twice the number of individuals with a graduate or professional degree (as a percentage of total population) compared to Huntersville, Mooresville and Charlotte.

### Emerging and existing needs

Based on the current housing inventory and demographic trends, several areas of potential need emerged.

- **Need for more rental units, especially apartments.** Nearly all of the new rental units in the Town are market rate, and while they will likely make Davidson more attractive to some populations previously underserved by the Davidson housing market (such as millennials), they will not address the need for more affordable housing options for lower income families and individuals.
- **Need for more affordable senior housing.** Although the share of the senior population in Davidson has not increased since 2000, their number has nonetheless grown and will continue to grow for the foreseeable future as the population continues to age. The newly opened Williams Place adds to the supply of senior housing, but it is all market rate and may not reach those of more limited means.
- **Need for increased diversity.** If one of the primary goals of Davidson's affordable housing program is to foster a more diverse community, then the demographic data provide a mixed message. Davidson's lack of diversity may prove a barrier long-term to Davidson remaining an attractive place to do business.

## 2. Who works in Davidson but can't afford to live there?

An important part of this assessment was an attempt to better understand Davidson's workforce and how the array of affordable housing programs might better serve the housing needs of that workforce, especially those with lower incomes. Analysis of publicly available employment data and information obtained by a sample of employers revealed some general trends about Davidson's labor force and interviews with several large employers in Town provided insights about the context of the business environment.

### Growing labor force

Davidson's labor force has more than doubled in 10 years, and has become more diversified. Davidson College and Ingersoll Rand are no longer the only players in Town, with the addition of a number of commercial establishments, MSC's corporate headquarters, and new primary and secondary educational institutions.

### Few Davidson workers live in the Town

The majority of people who work in Davidson don't live in Davidson, but in nearby areas. Only 8% of

those who work at an establishment in Davidson live in the Town. While it is not unusual for the majority of people in a suburban community in a large metropolitan area to commute to other parts of the metro area for work, Davidson's share of people working and living in it is still the lowest among its neighbors.

Most of those who work in Davidson but don't live there do live fairly close by, with about 40% living less than 10 miles away and about 2/3 within 25 miles of Davidson. These numbers align with a consistent theme that emerged from the interviews with representatives of some of Davidson's major employers, that "Davidson is not an island" when it comes to its labor force.

While Davidson is an affluent residential community, nearly half of workers in Davidson earn \$40,000 or less in individual income (22% make less than \$15,000). Combined with Davidson also having the highest housing values in the area, it's safe to say that housing affordability is likely an important consideration for many people who work in Davidson but choose to live elsewhere.

### Emerging and existing needs

From an employer's perspective, the issue of housing affordability in Davidson has not yet impeded their ability to attract the necessary talent to fill their jobs, as many of their workers are able to find adequate and affordable housing within an acceptable distance from work.

That is not to say that many of the people who work in Davidson but don't live there wouldn't appreciate having the option to live in Davidson. Certainly, the Town's ability to capture more of those workers as residents would help it achieve its long-term goal of being a more diverse and inclusive community. While housing affordability was not expressed as a significant barrier to attracting talent, several employers did acknowledge the Town's *lack of diversity* as a factor in recruiting employees and their need to promote Davidson's proximity to Charlotte and other more diverse communities as residential options for those looking for a more diverse place to live.

### 3. What are the housing needs in Davidson along a spectrum of affordability?

As the Town considers how to capture more workers as residents, it is equally important to consider the housing needs of Davidson's current residents and their ability to continue living in Davidson in the face of rising property values and the gentrification of affordable neighborhoods.

While many studies quantify a precise number of units needed at different AMI levels, this was not possible in (or within the scope of) this study. The available data sources were not comprehensive or consistent enough to provide reliable. Perhaps more importantly, despite the fact that such numbers often appear to be objective, there is a great degree of subjectivity involved in determining them. Many of the factors used to determine such numbers are informed by community values and goals with regard to affordable housing, which require greater clarity. To that end, this study provides information to inform such discussions. In reviewing the data around Davidson's current population and existing housing inventory, several broad trends emerge.

#### Lack of affordable housing for very low-income households

As the area's housing costs increase, the number of Davidson's residents being classified as cost-burdened is on the rise, suggesting that a growing

number of residents are in need of more affordable housing. This is especially true for Davidson's lowest income households (those making less than \$35,000), indicating a greater need for more affordable housing options for the Town's very low income families. While there are a number (around 125) of subsidized units that serve this population (Oak Hill apartments, DHC units, and Habitat homes), the number of households in this income range is over 500.

#### Homes becoming less affordable

According to the 2011 tax assessment, 36% of single-family homes, townhomes, and condominiums in Davidson have values that are considered affordable for those with household incomes between 50% to 120% AMI (households that are less than 50% AMI would likely not qualify for a home loan). However, the Davidson housing market has changed since 2011, as recent sales show. Only 19% (86) of the 438 sold homes from 2015-2016 were affordable to those under 120% AMI. While this is still higher than the 12.5% goal, it indicates that Davidson is becoming even less affordable for those under 120% AMI. It is also noteworthy that nearly 7% of Davidson's total housing inventory (both rental and owner-occupied) is subsidized in some form, mostly by local programs such as the Town's affordable housing ordinance, Davidson College's land lease program, and the work of non-profit groups. All of these are intentional efforts to enhance affordable housing options.

### Emerging and existing needs

- **Need for more affordable rental options.** Over 40% of the renters currently living in Davidson (about 390 households) are cost-burdened. This share has risen from 31% in 2000 and is a clear indication that renting in Davidson is becoming less affordable.
- **Need for more affordable units for very low-income households.** Based on cost-burden, the greatest need for more affordable rental options in Davidson are those with very low incomes.

## 4. What are the complexities and context of developing affordable housing in Davidson?

Over the course of this study, the complexity of affordable housing development in Davidson became increasingly apparent. The interviews provided considerable insight into the local context of affordable housing, which was augmented by the research team's local expertise.

### Influx of new residents

Most key informants expressed a personal belief that a commitment to affordable housing should remain an enduring value for Davidson but were uncertain whether a majority of Davidson's residents still shared that sentiment. This uncertainty seemed to stem from two factors – 1) recent opposition from some segments of the population to the affordable housing ordinance, and 2) the reality of so many new residents having moved to Davidson since the ordinance was enacted, most with little or no understanding of the program or the community's long tradition of supporting affordable housing.

### Administration of Town affordable housing ordinance

Even for those who were familiar with and committed to the Town's affordable housing ordinance, there were a number of questions raised about its administration. These included questions about how the funds collected from the "payment in lieu of" fee are being used, whether or not the Town should "have some skin in the game" through a

dedicated source of funds for affordable housing (beyond what developers contribute), and the best way to administer the program so that the Town attorney isn't playing the dual role of both defending the program against legal challenges and administering its implementation.

### West Side Gentrification

As previous sections of the study have shown, most of Davidson's subsidized and naturally occurring affordable housing is currently concentrated in the central and western parts of Town, especially the West Side neighborhood. As more developers opt for the payment in lieu, additional units of affordable housing built with those funds will likely be in this same area because the cost of the land is cheaper.

Not only does this contrast with the goal of dispersing affordable housing throughout the community but will become increasingly difficult over time given the gentrification pressure facing the West Side. As gentrification of the West Side progresses, it will put the existing affordable housing and residents at risk of displacement and jeopardize the ability to locate new affordable housing in these neighborhoods. Finding solutions to these issues that satisfy both the Town and the current residents living on the West Side will be a challenge.

### Open space preservation

One issue that deserves further analysis and community discussion is the relationship between the Town's affordable housing goals and those

associated with open space protection. Davidson is to be commended for making each a priority and for enacting policies that foster both. However, research demonstrates that open space protection in fast-growing communities can place upward pressures on land values by limiting the supply of land available for residential development. Acknowledging this dynamic does not mean that the

Town of Davidson should feel that it must make a choice between two worthwhile goals; instead, it should be strategic in aligning its land use policies to mitigate such unintended consequences and look to other communities around the country that have attempted to reconcile the two for lessons that it can apply to Davidson.

# Recommendations

After sifting through the demographic, employment, and housing data and synthesizing the wealth of insights gleaned through the key informant interviews, a number of recommendations emerged as logical next steps.

## Engage in a broad community discussion around affordable housing to set community goals

Given that the Town's commitment to affordable housing is based in part on a commitment to maintaining a diverse and inclusive community, a broader community discussion is needed about what "diverse and inclusive" means for the Town's residents. This discussion should then serve as context in determining the types of housing and the ranges of affordability that Davidson wants to encourage through its affordable housing program. This would include establishing target goals for the amount of housing affordable to different AMI levels and the issue of the geographic distribution of affordable housing. Based on this discussion, the Town should also consider setting an aspirational, 10-year goal for capturing a certain percentage of people who work in Davidson as Town residents, with the goal being more than the current 8%.

## Conduct an education/awareness campaign about the Town's affordable housing program

The Town should conduct an education and awareness campaign about its affordable housing program to make citizens more aware of the program, how it serves the Town's core values and goals, and proposed areas for enhancement as outlined in this assessment. This campaign should serve as a prelude to the community dialogue about

what Davidson means about being an "inclusive and diverse community".

## Conduct a survey of employees working in Davidson

The Town should work with major employers to conduct a confidential survey of their workers to assess their interest in Davidson as a place to live, including affordability considerations, desired types of housing options, and other quality of life considerations. Such a survey would help the Town set a realistic goal for the percentage of workers it might capture as residents and would inform the types of investments in both affordable housing options and quality of life amenities the Town would need to make in order to reach that goal.

## Examine affordable rental options

Given Davidson's limited rental choices, the Town should consider expanding its affordable housing program to encourage more apartments and other rental options as part of its supply of affordable housing. Currently, much of Davidson's focus on affordable housing is geared toward homeownership, including the Town's affordable housing ordinance and programs administered by local non-profit institutions. Expanding the scope of local affordable housing options to rental would be consistent with similar recommendations being made by affordable housing advocates at the national level and could help to address Davidson's need for additional housing for low-income households that would not be in the homeownership market, including seniors and millennials.



### Explore ways to strengthen the Town program

The Town should initiate conversations with the Davidson Housing Coalition or other non-profit housing agencies like Charlotte-Mecklenburg Housing Partnership or Habitat for Humanity about exploring opportunities to strengthen and expand their role. This expanded role could include serving as a pass-through of funds generated for affordable housing (from both the “payment in lieu of” fees from the development community and any new revenue streams from public funds) for both the acquisition of land and the development of new affordable housing units. Another opportunity would be to explore a partnership that empowers a non-profit agency to play more of a “land banking”

role to acquire land for the future development of affordable housing.

The Town should explore a dedicated revenue stream of public dollars to supplement the contributions of the private sector. One option is to allocate an amount for affordable housing from the Town's general fund on an annual basis. Some of the key informants suggested adding more certainty by earmarking a portion of the tax revenue for this purpose (such as a penny each year designated for affordable housing). Another option is the General Obligation (GO) Bond.

The Town should also research examples of how other communities have equitably distributed affordable housing geographically.

# Concluding thoughts

Davidson has a strong tradition of supporting affordable housing, one that dates back generations and has enjoyed the support of the community's public, private and non-profit sectors alike. While Davidson has made great strides around affordable housing, there are opportunities to continue and strengthen this work. The data show that there is still a need for more affordable housing in Davidson and for housing options that address current and potential residents of diverse socio-economic backgrounds. Further, the Town's changing demographics and rising land values suggest that this need will only grow more acute in the years ahead.

As the Town reassesses its affordable housing priorities and strategies to address those needs,

public education and input will be essential to a successful process. While such strategies touch on economic, housing and land use policies, they also reflect a community's core values about what it means to be a compassionate, inclusive and diverse place to live and work. Having clarity about those values and consensus around who the Town of Davidson hopes to serve will go a long way toward understanding how to use the data in this assessment to enhance the Town's current affordable housing program.

Just as the program was initially established to "encourage opportunities, services, and infrastructure that allow people of all means to live and work" in Davidson, its continued success will depend on the same clarity of vision.

# Appendix

## Key Informants

### Town of Davidson Elected Officials

- John Woods, Mayor
- Stacy Anderson
- Beth Cashion
- Brian Jenest
- Rodney Graham
- Jim Fuller

### Administrative

- Jamie Justice, Town Manager

### Non-Profits

- Marcia Webster, Davidson Housing Coalition
- Margo Williams, Davidson Housing Coalition

### Private Sector

- Martin Kerr, builder
- David and Betsey Stewart
- David Nelson, Lennar

### Other Citizens

- Tracy and Marvin Brandon
- Juliet Bowden, Berkshire-Hathaway
- Mike Kessler, Davidson College

### Two Groups

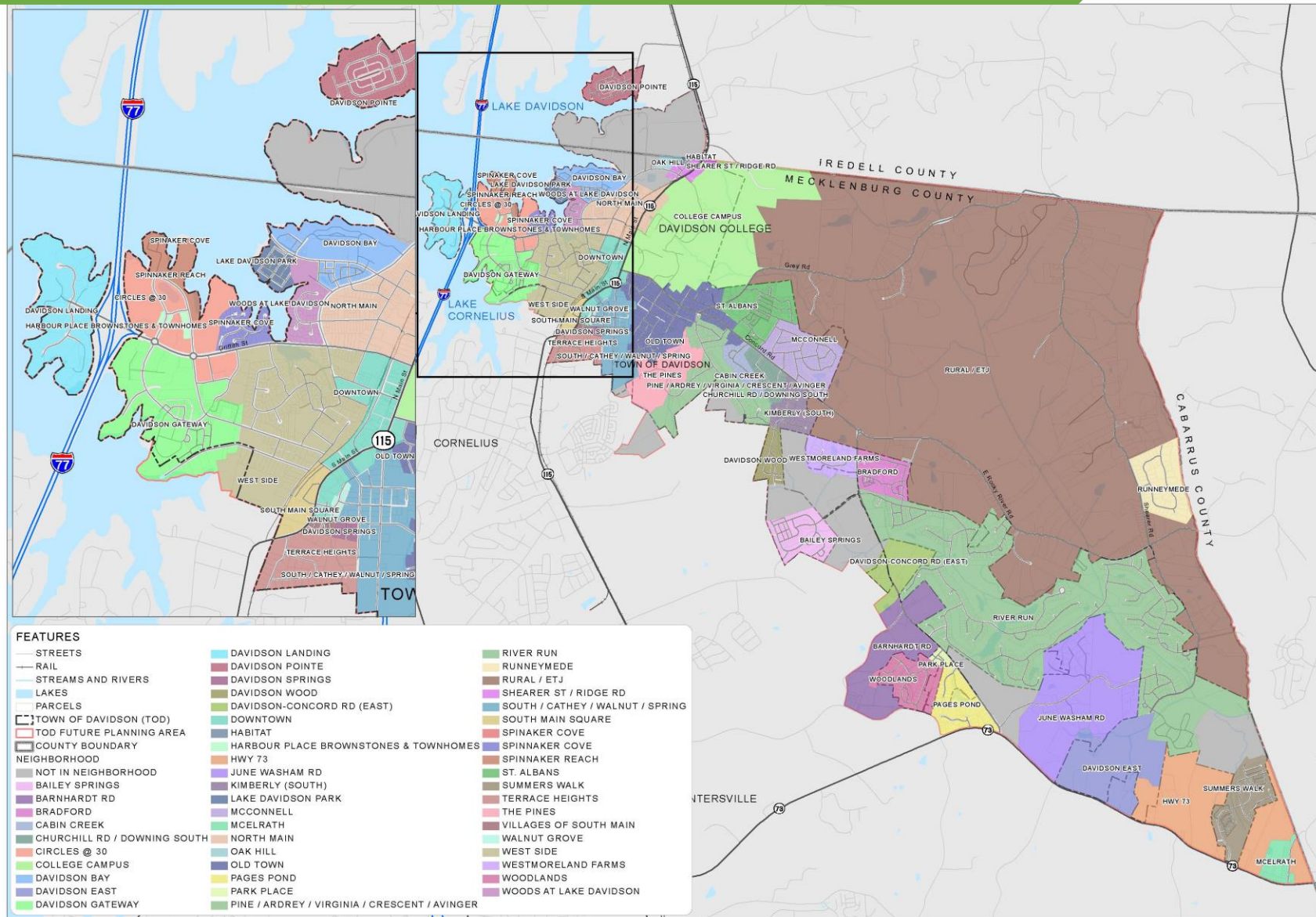
- Davidson Housing Coalition's Affordable Housing Advisory Board
- Davidson Village Network's Board of Directors

### Employer Representatives

- Jamie Justice, Town of Davidson
- Kim Ball, Davidson College
- Linda Frost, MSC
- Dana Jarrett, Davidson Elementary

# Neighborhood Reference Map

Created by the Town of Davidson Planning Department



Date: 9/30/2015

DATA SOURCE: NC ONE MAP: MECKLENBURG COUNTY, NC;  
AND DATA CREATED BY THE TOWN OF DAVIDSON

## NEIGHBORHOODS

TOWN OF DAVIDSON

NORTH CAROLINA



1 inch = 1,951 feet

0 1,951 3,902 Feet

This product is for informational purposes and may not have been prepared for, or be suitable for legal, engineering, or surveying purposes. Users of this information should review or consult the primary data and information sources to ascertain the usability of the information.



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**Agenda Title:** Arbor Day Proclamation

**Summary:**

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**ATTACHMENTS:**

Description	Upload Date	Type
📎 Arbor Day	3/9/2017	Presentation



**A PROCLAMATION**  
**The Town of Davidson Arbor Day**  
**March 17, 2017**

**WHEREAS**, the Town of Davidson recognizes the value of trees as a precious natural resource that improves the appearance of our community, increases the value of commercial and residential property, reduces energy costs, moderates air temperature, decreases soil erosion and storm water run-off, provides habitat for wildlife, absorbs air pollutants and produces oxygen; and

**WHEREAS**, in 1872, J. Sterling Morton proposed to the Nebraska Board of Agriculture that a special day be set aside for the planting of trees; and

**WHEREAS**, this day, known as Arbor Day, is now celebrated throughout the nation and world; and

**WHEREAS**, the State of North Carolina has determined that Arbor Day shall be celebrated annually on the first Friday following the fifteenth of March; and

**WHEREAS**, The Town of Davidson has been a "Tree City" for the past 7 years and earned a Growth Award for 2015 efforts; and

**WHEREAS**, the Town of Davidson has adopted a tree ordinance and appointed a Livability Board to protect, conserve, maintain, and enhance trees in our community.

**NOW, THEREFORE**, I, John M. Woods, Mayor of the Town of Davidson, North Carolina, do hereby proclaim **March 17, 2017** as: *The Town of Davidson Arbor Day 2017* and call upon all citizens of our town to participate in the celebration, ceremonies, and activities on this day we urge all citizens to support efforts to protect our trees and woodlands, and we urge all citizens to plant trees to promote the well-being of our present and future.

**Proclaimed** this 14<sup>th</sup> day of March, 2017.

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John M. Woods  
Mayor





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**Agenda Title:** Approve First Tuesday Minutes from February 7, 2017  
Approve Second Tuesday Agenda Minutes from February 14, 2017  
Approve Coffee Chat Minutes from February 20, 2017  
Approve Fourth Tuesday Agenda Minutes from February 27, 2017

**Summary:** Approve Agenda Minutes from February Meetings

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**ATTACHMENTS:**

<b>Description</b>	<b>Upload Date</b>	<b>Type</b>
❑ Draft 2017-02-07 Minutes (1st Tue)	3/14/2017	Cover Memo
❑ Draft 2017-02-14 Minutes (2nd Tue)	3/14/2017	Cover Memo
❑ Draft 2017-02-20 Minutes (Coffee Chat)	3/14/2017	Cover Memo
❑ Draft 2017-02-28 Minutes (4th Tue)	3/10/2017	Cover Memo



College Town. Lake Town. *Your Town.*

February 7, 2017

**REGULAR MEETING  
TOWN OF DAVIDSON BOARD OF COMMISSIONERS**

The Town of Davidson Board of Commissioners held regularly scheduled meeting on Tuesday, February 7, 2017 at the Davidson Library – 119 South Main Street, Davidson, NC 28036. Mayor Woods called the meeting to order at 4:03 p.m. Present were Mayor John Woods and Commissioners, Cashion, Fuller, Jenest and Graham. Commissioner Anderson was present via phone. Commissioner Fuller was excused at 5:30 p.m. Staff included Town Manager Jamie Justice and Planning Director Jason Burdette.

Planning Director Jason Burdette gave an update on the Rural Area Plan which included discussions with citizens as well as the updates to the frequently asked questions page. Town Manager Jamie Justice updated the Board on Beaty Street Request for Proposals (RFP) process. Additionally, interviews were being held with developers on February 7, 2017 at 6 p.m. Beaty Street RFP committee. Town Hall Day, in Raleigh will be held on March 29, 2017.

The meeting adjourned at 5:51 p.m.

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John M. Woods  
Mayor

**Attest:**

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Carmen Clemsic  
Town Clerk



February 14, 2017

**WORK SESSION  
TOWN OF DAVIDSON BOARD OF COMMISSIONERS**

The Town of Davidson Board of Commissioners held its regularly scheduled pre-meeting on Tuesday, February 14, 2017 in the Town Hall Board Room. Mayor Woods called the meeting to order at 4:04 p.m. Present were Mayor John Woods and Commissioners Anderson, Cashion, Graham and Jenest; Commissioner Fuller was absent. Town Manager Jamie Justice, Town Attorney Cindy Reid, Assistant Town Manager Dawn Blobaum, Finance Director Pieter Swart, Planning Director Jason Burdette, Public Information Officer Cristina Shaul, Economic Development Manager Kim Fleming, Human Resources Manager Heather James, Fire Chief Bo Fitzgerald and Town Clerk Carmen Clemsic were also present.

The following items were included under other discussion:

- **Stream Restoration Mecklenburg County Project**

Parks and Recreation Director Kathryn Spatz introduced Dave Kronin and Marc Boone with Mecklenburg County who discussed the stream restoration project that would take place to help with the erosion caused by storm water.

- **Transportation Projects/Grants Update**

Public Works Manager Doug Wright and Senior Planner Travis Johnson discussed upcoming projects and projects that are in progress and the costs associated with both.

- **Local Transit Service (pilot)**

Economic Development Manager Kin Fleming presented a plan to provide local transit service (trolley/shuttle) within the Town and discussed piloting the service with a trial period from Apr-Jun 2017 with stops on the east and west areas of Davidson.

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**REGULAR MEETING  
TOWN OF DAVIDSON BOARD OF COMMISSIONERS**

The Town of Davidson Board of Commissioners held its regularly scheduled pre-meeting on Tuesday, February 14, 2017 in the Town Hall Board Room. Mayor Woods called the meeting to order at 6:00 p.m. Present were Mayor John Woods and Commissioners Anderson, Cashion, Graham and Jenest; Commissioner Fuller was absent. Town Manager Jamie Justice, Town Attorney Cindy Reid, Assistant Town Manager Dawn Blobaum, Finance Director Pieter Swart, Planning Director Jason Burdette, Public Information Officer Cristina Shaul, Economic Development Manager Kim Fleming, Human Resources Manager Heather James, Fire Chief Bo Fitzgerald and Town Clerk Carmen Clemsic were also present.

Mayor Woods called the meeting to order at 6:10 p.m.

- **Announcements**

The Davidson Board of Commissioners will host a Coffee Chat on Monday, February 20 at The Egg from 6:30 to 7:30 p.m. Please join us.

There is a new question on Open Town Hall regarding the Davidson Police Department. Please visit [www.townofdavidson.org/OpenTownHall](http://www.townofdavidson.org/OpenTownHall) to share your thoughts.

The next meeting of the Davidson Board of Commissioners has been moved to Monday, February 27, 2017 from February 28, 2017.

- **Public Comments**

The public comment period was opened at 6:14 p.m. and there were a number of comments and concerns regarding the Beaty Street Property Request for Proposals from citizens. The Public Comment portion of the meeting was closed at 6:37 p.m.

- **Presentation**

Davidson College announced the upcoming Katherine M. Bray Women's Leadership Conference being held at the college.

Executive Director Ellen Donaldson gave an update of the Davidson-Cornelius Child Development Center.

- **Consent Agenda**

The following items were on the consent agenda:

Approve Team Summit Foundation Twilight Racing Series Exemption – Resolution 2017-16

Approve Tax Levy Adjustments

Approve Budget Amendment – BA 2017-13

Approve Regular Meeting Minutes from January 3, 2017

Approve Regular Meeting Minutes from January 10, 2017

Approve Regular Meeting Minutes from January 23, 2017

Approve Regular Meeting Minutes from January 24, 2017

Approve Retreat Minutes from January 27, 2017

Approve Revised Regular Meeting Schedule for 2017

**Commissioner Jenest made the motion to approve the consent agenda. The motion passed unanimously.**

- **New Business**

Consider Approval Resolution 2017-03 (Westbranch): Directing the Clerk to Investigate a Petition Received Under G.S. 160A-31.

**Commissioner Fuller motioned to recuse Commissioner Jenest from voting on the Westbranch property. The motion passed (4-1) Commissioner Anderson was opposed.**

**Commissioner Anderson motioned to approve Resolution 2017-03 the motion passed (4-0), Commissioner Jenest was recused from voting.**

Consider Approval Resolution 2017-04 (321 Catawba): Directing the Clerk to Investigate a Petition Received Under G.S. 160A-31.

**Commissioner Anderson motioned to approve Resolution 2017-04. The motion passed (5-0)**

Consider Resolution 2017-05: Bailey Springs – Advertise Upset Bid Process

**Commissioner Anderson motioned to approve Resolution 2017-05. The motion passed (5-0)**

- **Old Business**

Assistant Town Manager Blobaum asked the board to consider the approval of Capital Projects Ordinance 2017-03, in the amount of \$240,000 which was decreased from \$300,000 and the Public Facilities Budget Amendment 2017-12

**Commissioner Jenest motioned to approve the Capital Projects Ordinance 2017-03 and Public Facilities Budget Amendment 2017-12. Motioned passed (3-2) Commissioners Fuller and Anderson were opposed.**

Consider Approval of Ordinance 2017-01: Markham Property Map Amendment Consider Approval of the **Commissioner Fuller motioned to approve Ordinance 2017-01. The motion passed (5-0)**

Consistency Statement for the Markham Map Amendment

**Commissioner Fuller motioned to approve the Consistency Statement. The motion passed (5-0)**

Consider Approval of Ordinance 2017-02: Miscellaneous Text Amendments

**Commissioner Anderson motioned to approve Ordinance 2017-02. The motion passed (5-0)**

Consider Approval of the Consistency Statement for the Miscellaneous Text Amendments

**Commissioner Fuller motioned to approve the Consistency Statement. The motion passed (5-0)**

- **Adjourn**

The meeting adjourned at 8:07 p.m.

---

John M. Woods  
Mayor

**Attest:**

---

Carmen Clemisic  
Town Clerk



College Town. Lake Town. *Your Town.*

February 20, 2017

**REGULAR MEETING – COFFEE CHAT  
TOWN OF DAVIDSON BOARD OF COMMISSIONERS**

The Town of Davidson Board of Commissioners held its regularly scheduled meeting at The New Town Cinemas, 227 Griffith Street, Davidson, NC 28036. Present were Mayor Woods; Commissioners Anderson, Graham, Jenest and Fuller. Staff included: Town Manager Jamie Justice and Assistant Town Manager Dawn Blobaum.

The meeting began at 6:30 p.m.

Assistant Town Manager Dawn Blobaum gave an overview of the Beaty Street Property Request for Proposal (RFP) process. The Commissioners then fielded questions regarding the Beaty Street Property from citizens in the audience.

The meeting adjourned at 8:15 p.m.

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John M. Woods  
Mayor

**Attest:**

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Carmen Clemsic  
Town Clerk





February 27, 2017

## **WORK SESSION THE TOWN OF DAVIDSON BOARD OF COMMISSIONERS**

The Town of Davidson Board of Commissioners held its regularly scheduled work session on Monday, February 27, 2017. The Mayor called the meeting to order at 4:05 p.m. Present were Mayor John Woods and Commissioners Anderson, Cashion, Fuller (via phone), Graham and Jenest. Town Manager Jamie Justice, Assistant Town Manager Dawn Blobaum, Planning Director Jason Burdette, Public Information Officer Cristina Shaul, Economic Development Manager Kim Fleming, Public Works Director Doug Wright, Parks and Recreation Director Kathryn Spatz, Police Chief Jeanne Miller, Fire Chief Bo Fitzgerald, Human Resources Manager Heather James and Town Clerk Carmen Clemsic were also present.

- **Rural Area Plan Update**

Planning Director Jason Burdette updated the board on the upcoming Rural Area Plan and asked the board to consider approving the plan at the upcoming March 28, 2017 meeting.

- **Town Hall Tour**

Public Information Officer Cristina Shaul discussed the current public facilities concerns and provided a tour to the board and citizens who were present during the work session of the meeting.

The meeting adjourned at 5:05 p.m.

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## **REGULAR MEETING THE TOWN OF DAVIDSON BOARD OF COMMISSIONERS**

The Town of Davidson Board of Commissioners held its regularly scheduled meeting on Monday, February 27, 2017. The Mayor called the meeting to order at 6:10 p.m. Present were Mayor John Woods and Commissioners Anderson, Fuller (via phone), Graham and Jenest. Commissioner Cashion arrived at 7:15. Town Manager Jamie Justice, Assistant Town Manager Dawn Blobaum, Planning Director Jason Burdette, Public Information Officer Cristina Shaul, Economic Development Manager Kim Fleming, Public Works Director Doug Wright, Parks and Recreation Director Kathryn Spatz, Human Resources Manager Heather James and Town Clerk Carmen Clemsic were also present.

- **Commissioner Reports**

Commissioners provided updates on the councils they are members of. Mayor John Woods, Centralina Council of Governments and Metropolitan Transit Commission; Commissioner Stacey Anderson, Arts & Science Council; Commissioner Beth Cashion, Visit Lake Norman and North Mecklenburg Alliance;

Commissioner Fuller, Lake Norman Chamber; Commissioner Graham: Lake Norman Regional Economic Development Organization; Commissioner Jenest, Charlotte Regional Transportation Planning Organization and Lake Norman Transportation Commission.

- **New Business**

Town Attorney Cindy Reid asked the board to consider approving two Community Block Grant Applications; Ada Jenkins-received \$185,000 for a new HVAC and Davidson-Cornelius Child Development Center – received \$107,500 for Scholarships.

**Commissioner Anderson motioned to approve the two Community Block Grant Applications. The motion passed (5-0)**

- **Discussion**

Assistant Town Manager Dawn Blobaum presented the history of Beaty Street site, the process and requirements for the selection committee. The developer chosen from the Request for Proposal process, Luminous, also provided a presentation of their proposal for the site.

The meeting adjourned at 8:09 p.m.

---

John M. Woods  
Mayor

Attest:

---

Carmen Clemsic  
Town Clerk



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**Agenda Title:** Approve Tax Levy Adjustment

**Summary:** The Town received a tax levy adjustment refund check request from the Mecklenburg County Assessor's Office for \$1,414.70, on 1 parcel. The refund will be issued directly by the Town. Detail regarding the refund request is available in the Finance Office.

---

**ATTACHMENTS:**

Description	Upload Date	Type
No Attachments Available		



---

**Agenda Title:** Consider Approval of Budget Amendment BA2017-14 - Finance Director Piet Swart

**Summary:** BA2017-14 will appropriate unassigned fund balance to pay off a loan made under the Commerce Station Inter-local Agreement. The early pay off of this loan will save Davidson over \$7,800 in interest expense.

---

**ATTACHMENTS:**

<b>Description</b>	<b>Upload Date</b>	<b>Type</b>
BA2017-14	3/8/2017	Cover Memo

AMENDMENT TO THE BUDGET ORDINANCE

**BE IT ORDAINED** by the Governing Board of the Town of Davidson, North Carolina, that the following amendment be made to the annual budget ordinance for the fiscal year ending June 30, 2017:

**Section 1:** To amend the General Fund, the appropriations are to be changed as follows:

<u>Acct. No.</u>	<u>Account</u>	<u>Decrease</u>	<u>Increase</u>
10-40-4950-710	Debt Service		\$ 98,600.00

Budgeted expenditures will pay off debt Davidson is responsible for under the Commerce Station Inter-local Agreement with Huntersville and Cornelius.

**Section 2:** To amend the General Fund, the estimated revenues are to be changed as follows:

<u>Acct. No.</u>	<u>Account</u>	<u>Decrease</u>	<u>Increase</u>
10-00-3990-980	Fund Balance Appropriated		\$ 98,600.00

**Section 3:** Copies of this budget amendment shall be furnished to the Clerk of the Governing Board, and to the Budget Officer and the Finance Officer for their direction.

Adopted this 14th day of March, 2017



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**Agenda Title:** Consider Approval of Resolution 2017-10 - Opposing House Bill 64

**Summary:** Resolution opposing House Bill 64 which would require local government to have municipal elections in even numbered years.

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**ATTACHMENTS:**

<b>Description</b>	<b>Upload Date</b>	<b>Type</b>
□ R2017-10 - Opposing House Bill 64	3/13/2017	Resolution Letter





## **RESOLUTION 2017-10**

### **OPPOSING HOUSE BILL 64**

**WHEREAS**, Municipalities in North Carolina have a long-standing history of being well managed - with no election improprieties or gross mismanagement of power; and

**WHEREAS**, we as local officials care for the health, safety and well-being of our citizens and the properties encompassed within our municipalities; and

**WHEREAS**, we believe local officials, who live and work daily in the communities they represent, can best determine the specific needs of our citizens and our communities; and

**WHEREAS**, municipal elections are purposely held in odd numbered years. In the Town of Davidson these elections are held every two years and are nonpartisan; and

**WHEREAS**, of North Carolina's 533 cities, only eight have chosen to have partisan elections; and

**WHEREAS**, municipal elections are held in odd years with national and state elections held in even years, in order to separate national elections from local government elections; to allow citizens to focus on the issues and candidates that are of singular importance to their individual neighborhoods and communities; and

**NOW, THEREFORE, BE IT RESOLVED** that the Board of Commissioners of the Town of Davidson is opposed to House Bill 64 which would move Municipal Elections to even number years due to the following reasons:

1. Elections in odd numbered years allows people to be informed regarding local issues and municipal candidates who can best serve their communities;
2. This bill is not necessary as citizens currently have the ability to move their elections to even numbered years if they choose to do so by requesting local Legislative action;
3. There would be no cost savings as Municipal Governments pay for Municipal Elections;
4. Citizens should retain local control of their municipalities and Municipal Elections without the interference of National and State influences;
5. If moved to even number years to coordinate with National and State Elections, Municipal Elections would become driven by national issues and candidates.

**Adopted on the 14th day of March 2017.**

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John M. Woods, Mayor

ATTEST:

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Carmen Clemsic, Town Clerk



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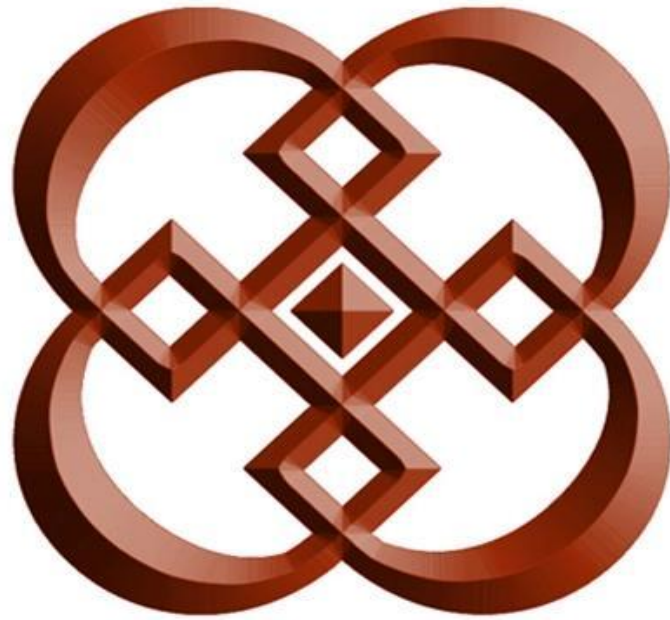
**Agenda Title:** Beaty Street Proposal and Public Comment - Assistant Town Manager Dawn Blobaum

**Summary:** This is a special public comment period specifically for the Beaty Street project. If you have questions about the history of the Beaty Street project, please see the February 27 board meeting agenda and video. There will be a short presentation followed by public comments.

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**ATTACHMENTS:**

<b>Description</b>	<b>Upload Date</b>	<b>Type</b>
☐ Beaty Street Presentation	3/14/2017	Presentation
☐ Hotel Examples	3/14/2017	Presentation

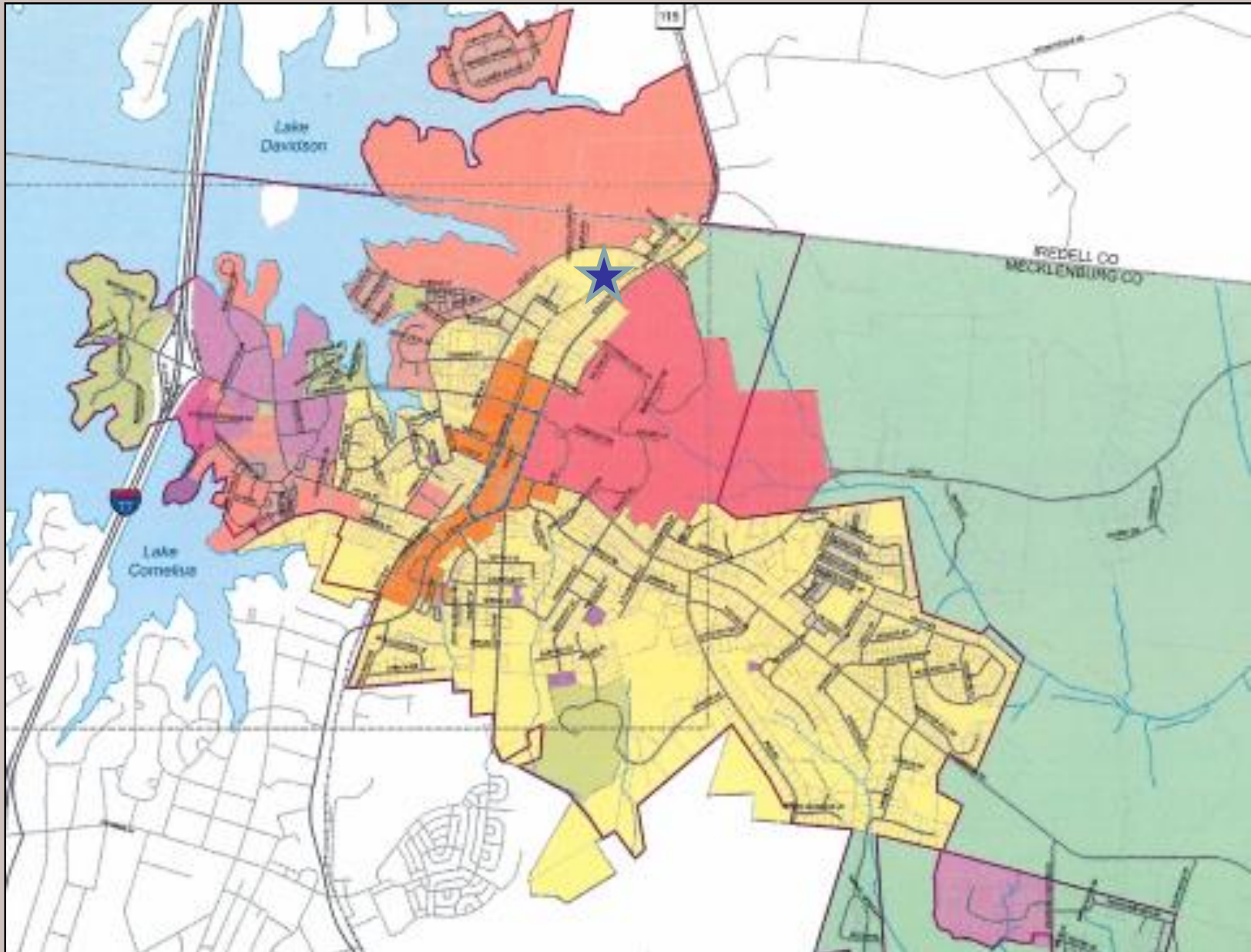


# *The* Town *of* Davidson

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College Town. Lake Town. *Your Town.*

# Beaty Street property





# Beaty Street property



# Beaty Street property history

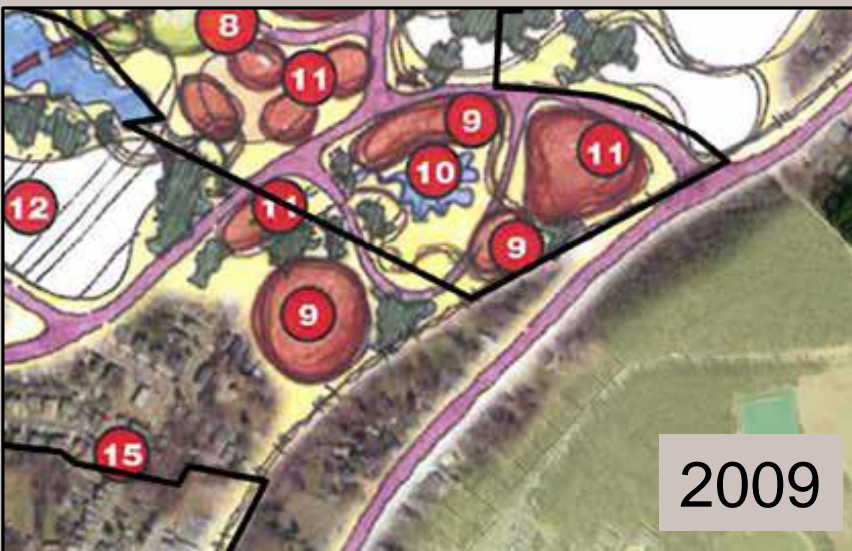
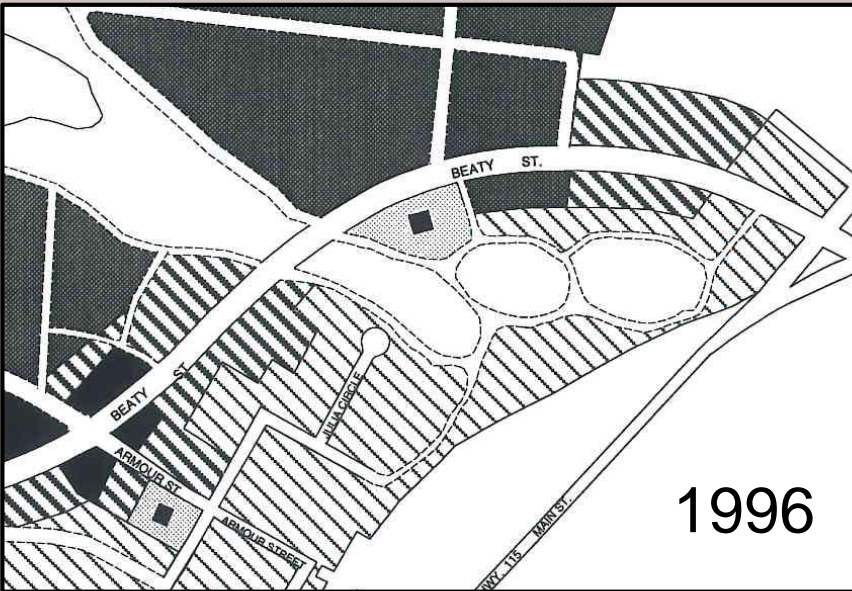
- 14 acres purchased from Clontz family in 1987. Additional adjoining four acres in 1988 and 1995.
- Purchased additional adjoining parcels (approx. one acre) in mid-2000s:
  - Fiji House – 832 Beaty Street
  - 825 Shearer Street house
- Request for Proposals to developers in 1996
  - No action taken





# Beaty Street History

Four small area plans 1996 – 2012:



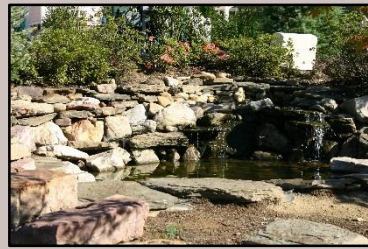
# Beaty Street RFP

## Values:

- Walkability
- Mixed-used neighborhoods
- Diversity
- Sustainability
- Sense of community













# Beaty Street RFP

- Issued RFP on August 26
- Received six proposals January 18, 2017
- Selection committee reviewed proposals, interviewed developers, voted on final selection on February 15
- February 27 BoC meeting – introduced developer
- March 14: public comment period



# Process moving forward

- April 11 BoC meeting: vote on developer
- April/May: Citizen input meeting
- Begin upset bid process per NCGS 160A-269
- 180 day due diligence period
- Negotiate purchase contract and land development agreement
- Master plan process, including public input





# Luminous





# Luminous

- Multi-family: 132 condos
- Single-family: 11 for sale
- Total units: 164
- Affordable housing: 21 townhomes for sale
- Commercial:
  - 100 room hotel
  - 28,000 commercial
  - Davidson Learns space



# Luminous

- Parks: 6.5 ac park/60% open space
- Transportation improvements: \$550,000
- Purchase price: \$1,650,000
- Payment Schedule:
  - Deposit: \$82,500
  - At closing: \$1,567,500
  - Commencement of intersection improvements: \$550,000
- Tax revenue annually: \$344,128



# We want to hear from you:

- 1) [www.townofdavidson.org/BeatyStRFP](http://www.townofdavidson.org/BeatyStRFP)
- 2) [BeatyStRFP@townofdavidson.org](mailto:BeatyStRFP@townofdavidson.org)

# Carolina Inn, Chapel Hill





# Washington Duke Inn, Durham





# Hanover Inn, Dartmouth





# Nassau Inn, Princeton





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**Agenda Title:** Consider Approval of Resolution 2017-07 - Annexation: 321 Catawba - Set the Public Hearing Date - Town Clerk Carmen Clemsic

**Summary:** Requesting the Board to approve the public hearing date for the annexation on April 11, 2017.

---

**ATTACHMENTS:**

<b>Description</b>	<b>Upload Date</b>	<b>Type</b>
☐ Certificate of Sufficiency	3/9/2017	Exhibit
☐ Resolution 2017-07	3/9/2017	Resolution Letter



## CERTIFICATE OF SUFFICIENCY

**321 CATAWBA AVE**

To the Board of Commissioners of the Town of Davidson, North Carolina:

I, Carmen Clemsic, do hereby certify that I have investigated the attached petition and hereby make the following findings:

- a. The petition from TSG Partners, LLC contains an adequate property description of the area proposed for annexation.
- b. The area described in the petition is contiguous to the Town of Davidson primary corporate limits, as defined by G.S. 160A-31.
- c. The petition is signed by and includes addresses of all owners of real property lying in the area described therein.
- d. The parcel subject to this Annexation Petition are already subject to the Town of Davidson's zoning jurisdiction. The owner claims all vested rights that attach to the site pursuant to all issued and valid permits and pursuant to the Settlement Agreement recorded in Map Book 60, Page 102 Mecklenburg County Public Registry, which is not currently in the Davidson Corporate limits.

In witness, whereof, I have hereunto set my hand and affixed the seal of the Town of Davidson, this 9<sup>th</sup> day of March, 2017.



Carmen Clemsic, Town Clerk





## **RESOLUTION 2016-07**

### **FIXING DATE OF PUBLIC HEARING ON QUESTION OF ANNEXATION PURSUANT TO G.S. 160A-31 *321 Catawba Avenue***

WHEREAS, a petition requesting annexation of the area described herein has been received; and

WHEREAS, the Board of Commissioner has by resolution directed the Town Clerk to investigate the sufficiency of the petition; and

WHEREAS, certification by the Town Clerk as to the sufficiency of the petition has been made;

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Town of Davidson, North Carolina that:

Section 1. A public hearing on the question of annexation of the area described herein will be held at Town Hall Board Room at 6:00 p.m. on April 11, 2017.

Section 2. The area proposed for annexation is described as follows:

(See page 3 for Mets and Bounds Description)

\*Section 3. Notice of the public hearing shall be published in Mecklenburg Times, a newspaper having general circulation in the Town of Davidson, at least ten (10) days prior to the date of the public hearing.

\_\_\_\_\_  
John M. Woods, Mayor

ATTEST:

\_\_\_\_\_  
Carmen Clemsic, Town Clerk


## PETITION REQUESTING ANNEXATION

Date: 2/1/2017

Subdivision Name: 321 Catawba Ave.  
Tract 1, Lot A

To the Board of Commissioners of the Town of Davidson:

1. We the undersigned owners of real property respectfully request that the area described in Paragraph 2 below be annexed to the Town of Davidson.
2. The area to be annexed is contiguous to the Town of Davidson and the boundaries of such territory are more particularly described as that portion of Tract 1, Lot A, as shown on the map recorded in Map Book 60, Page 102 Mecklenburg County Public Registry, which is not currently in the Davidson Corporate limits. A description of Tract 1, Lot A is attached hereto as Exhibit A.
3. We acknowledge that any zoning vested rights acquired pursuant to G.S 160A-385.1 or G.S. 153A-344.1 must be declared and identified on this petition. We further acknowledge that failure to declare such rights on this petition shall result in a termination of vested rights previously acquired for the property. (If zoning vested rights are claimed, indicate below and attach proof.)

<u>Name</u>	<u>Address</u>	<u>Do you declare vested rights?</u> (Indicate yes or no.)	<u>Signature</u>
TSG Partners, LLC by Mike Orlando member/manager	215 S. Main St. Davidson, N. C. 28036	YES	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <small>DocuSigned by:</small>    <small>A88221A98A17479...</small> </div>



## EXHIBIT A

BEGINNING at a computed point, situated on the northern line of Davidson Acquisition Company, LLC, now or formerly, as shown more particularly in Deed Book 29594 at Page 700, of the Mecklenburg County Public Registry, thence N 68-57-56 W 62.60 feet to a #5 Rebar Set, thence along the new property line, N 20-43-54 E 300.20 feet to a #5 Rebar Set, along the southern line of Catawba Avenue, thence S 69-28-59 E 63.84 feet to a #5 Rebar Set, thence S 20-29-41 W 299.63 feet to the point and place of BEGINNING, and containing approximately 0.435 acres, more or less, all as shown on that certain survey prepared by Rufus Jackson Love, on the 7th day of October 2016, for TSG Partners, LLC, Property of Vennie Moore & John R. Moore, as shown more particularly in Deed Book 8236 at Page 184 of the Mecklenburg County Public Registry.



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**Agenda Title:** Consider Approval of Resolution 2017-08 - Annexation: Westbranch - Set the Public Hearing Date - Town Clerk Carmen Clemsic

**Summary:** Requesting the Board to approve the public hearing date for the annexation on April 11, 2017.

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**ATTACHMENTS:**

<b>Description</b>	<b>Upload Date</b>	<b>Type</b>
☐ Resolution 2017-08	3/9/2017	Resolution Letter
☐ Certificate of Sufficiency	3/9/2017	Exhibit



## RESOLUTION 2016-08

### FIXING DATE OF PUBLIC HEARING ON QUESTION OF ANNEXATION PURSUANT TO G.S. 160A-31 *Westbranch*

WHEREAS, a petition requesting annexation of the area described herein has been received; and

WHEREAS, the Board of Commissioner has by resolution directed the Town Clerk to investigate the sufficiency of the petition; and

WHEREAS, certification by the Town Clerk as to the sufficiency of the petition has been made;

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Town of Davidson, North Carolina that:

Section 1. A public hearing on the question of annexation of the area described herein will be held at Town Hall Board Room at 6:00 p.m. on April 11, 2017.

Section 2. The area proposed for annexation is described as follows:

(See page 6-8 for Mets and Bounds Description)

\*Section 3. Notice of the public hearing shall be published in Mecklenburg Times, a newspaper having general circulation in the Town of Davidson, at least ten (10) days prior to the date of the public hearing.

\_\_\_\_\_  
John M. Woods, Mayor

ATTEST:

\_\_\_\_\_  
Carmen Clemsic, Town Clerk

FEB - 2 2017

**PETITION REQUESTING ANNEXATION**

Date: January 18, 2017

To the Board of Commissioners of the Town of Davidson:

1. We, the undersigned owners of real property described on Exhibit A, respectfully request that the area described in Paragraph 2 below be annexed to the Town of Davidson.

2. The area to be annexed is contiguous to the Town of Davidson and the boundaries of such territory are as follows:

165.253 acres, northwest and southwest quadrants, Davidson Concord Road and Robert Walker Road, Davidson, Mecklenburg County, North Carolina, as further described on Exhibit A attached hereto.

3. We acknowledge that any zoning vested rights acquired pursuant to G.S. 160A-385.1 or G.S. 153A-344.1 must be declared and identified on this petition. We further acknowledge that failure to declare such rights on this petition shall result in a termination of vested rights previously acquired for the property. (If zoning vested rights are claimed, indicate below and attach proof.)

Owner Name: Lennar Carolinas, LLC

Owner Address: 700 N.W. 107<sup>th</sup> Avenue, Suite 400  
Miami, Florida 33172

Vested Rights: The parcels subject to this Annexation Petition are already subject to the Town of Davidson's zoning jurisdiction. The Owner claims all vested rights that attach to the site pursuant to all issued and valid permits, including but not limited to the Master Plan, Project Name: WestBranch (Residential), Robert Walker Drive, Davidson, NC 28036, approved on August 3, 2016. A copy of the approved Master Plan is attached hereto as Exhibit B and incorporated herein for all purposes.

LENNAR CAROLINAS, LLC,  
a Delaware limited liability company

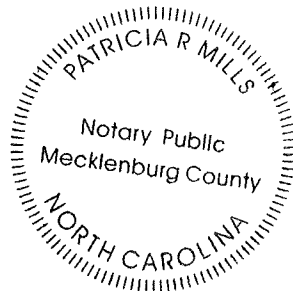
By: Jon S. Hardy  
Name: Jon S. Hardy  
Title: Vice President and Division President

STATE OF North Carolina  
COUNTY OF Mecklenburg

I, Patricia R Mills, Notary Public, do hereby certify that Jon S. Hardy  
personally appeared before me this day and acknowledged the due execution of the foregoing  
instrument.

Witness my hand and official seal this 18<sup>th</sup> day of January, 2017.

(Official Seal)



Patricia R Mills  
Official Signature of Notary Commission Expires 9-11-21



## **EXHIBIT A**

### **Legal Description**

BEING ALL OF THAT CERTAIN APPROXIMATELY 165.253 ACRES OF LAND  
SITUATED IN DEWEESE TOWNSHIP, MECKLENBURG COUNTY, NORTH CAROLINA:

#### **NORTH PARCEL**

COMMENCING FROM NCGS MONUMENT "HOPEWELL RESET" HAVING NORTH CAROLINA NAD 83/2011 GRID COORDINATES N:629,715.64, E:1,459,878.15 AND A COMBINED GRID FACTOR OF 0.99984864, PROCEED N 24-54-07 W 4,466.69'(GROUND DISTANCE), 4,466.01' (GRID DISTANCE) TO THE POINT OF BEGINNING A SET #5 REBAR ON THE NORTHERN RIGHT-OF-WAY OF ROBERT WALKER DRIVE HAVING A 60' RIGHT-OF-WAY AS RECORDED IN DEED BOOK 19009 PAGE 410 OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE RIGHT OF WAY OF ROBERT WALKER DRIVE THE FOLLOWING FOUR (4) COURSES AND DISTANCES: (1) WITH A CURVE TO THE LEFT HAVING A RADIUS OF 781.27 AN ARC LENGTH OF 155.51' A CHORD BEARING AND DISTANCE OF S 55-46-53 W 155.25' TO A SET #5 REBAR, (2) S 50-04-44 W 100.00' TO A SET #5 REBAR, (3) WITH A CURVE TO THE RIGHT OF HAVING A RADIUS OF 14830.08' AN ARC LENGTH OF 808.42' A CHORD BEARING AND DISTANCE OF S 51-38-26 W 808.32' TO A SET #5 REBAR, (4) S 53-11-48 W 223.51' TO A POINT IN SOUTH PRONG WEST BRANCH ROCKY RIVER, A COMMON CORNER WITH THE TOWN OF DAVIDSON AS RECORDED IN DEED BOOK 28922 PG 407, MAP BOOK 48 PAGE 317 AND ARTISAN KNOX, LLC AS RECORDED DEED BOOK 16977 PAGE 708, MAP BOOK 48 PAGE 677, OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE COMMON LINE WITH THE TOWN OF DAVIDSON AND ARTISON KNOX, LLC THE FOLLOWING FIVE (5) COURSES AND DISTANCES; (1) N 39-46-58 W 221.06' TO A POINT, (2) N 39-24-27 W 887.82 TO A POINT, (3) N 60-54-44 W 107.50' TO A POINT, (4) N 75-33-37 W 557.87' TO A POINT, THENCE LEAVING SOUTH PRONG WEST BRANCH ROCKY RIVER, (5) N 04-11-47 W , PASSING A FOUND CONCRETE MONUMENT AT 170.48', A TOTAL DISTANCE OF 2156.05' TO A FOUND 1 ½" PIPE, A COMMON CORNER OF HUDSON PLACE SUBDIVISION AS RECORDED IN MAP BOOK 25 PAGE 997, THENCE WITH THE COMMON LINE OF HUDSON SUBDIVISION LOTS 12 THRU 20; S 76-05-40 E 1023.51' TO A FOUND #4 REBAR A COMMON CORNER WITH GEORGE JOHN MANOS AND ANNE PLAKALIS MANOS AS RECORDED IN DEED BOOK 28825 PAGE 420, THENCE WITH THE COMMON LINE WITH MANOS THE FOLLOWING THREE (3) COURSES AND DISTANCES: (1) S 13-17-18 W 431.21' TO A SET #5 REBAR, (2) S 01-51-37 E, PASSING A #5 REBAR AT 145.74', A TOTAL DISTANCE OF 399.79' TO A SET #5 REBAR, (3) S 19-52-47 E 44.53' TO A FOUND #5 REBAR, A COMMON CORNER WITH JAMES W. HERRING & PHYLLIS AS RECORDED IN DEED BOOK 7939 PAGE 584 OF THE MECKLENBURG COUNTY REGISTRY THENCE WITH THE HERRING LINE THE FOLLOWING THREE (3) COURSES AND DISTANCES; (1) S 13-11-18 W 130.95' TO A FOUND #5 REBAR, (2) S 19-51-25 E 239.23' TO A FOUND #5 REBAR, (3) S 70-48-44 E 225.14' TO A FOUND #5 REBAR A COMMON CORNER WITH KEVIN R. O'BRIEN & NOREEN F. O'BRIEN AS

RECORDED IN DEED BOOK 25826 PAGE 270, MAP BOOK 42 PAGE 311, THENCE WITH THE COMMON LINE OF O'BRIEN THE FOLLOWING TWO (2) COURSES AND DISTANCES; (1) S 21-08-27 E 92.21' TO A FOUND #5 REBAR, (2) S 65-55-17 E 59.62' TO A FOUND #5 REBAR A COMMON CORNER WITH BETH A. SHAPCOTT & WILLIAM SHAPCOTT AS RECORDED IN DEED BOOK 24150 PAGE 149, MAP BOOK 42 PAGE 311 OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE COMMON LINE WITH SHAPCOTT N 77-19-22 E 157.46' TO A FOUND #5 REBAR, A COMMON CORNER WITH BENGT L. WIKTORIN & FIORELLA B. WIKTORIN AS RECORDED IN DEED BOOK 9704 PG 490, MAP BOOK 26 PAGE 459 OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE COMMON LINE OF WIKTORIN AND JAMES W. HERRING & PHYLLIS HERRING AS RECORDED IN DEED BOOK 7939 PAGE 584; S 66-58-44 E, PASSING A FOUND #5 REBAR AT 190.17', A TOTAL DISTANCE OF 352.10' TO A FOUND #5 REBAR, A COMMON CORNER WITH ROBERT SCOTT JENKINS & TAMMY S. JENKINS AS RECORDED IN DEED BOOK 23007 PAGE 85, MAP BOOK 26 PAGE 459 AND A FOLLOWING A BOUNDARY LINE AGREEMENT RECORDED IN DEED BOOK 12230 PAGE 602 OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE COMMON LINE WITH JENKINS THE FOLLOWING THREE (3) COURSES AND DISTANCES; (1) S 66-58-44 E 71.00' TO A FOUND #5 REBAR, (2) N 44-29-29 E 127.75' TO A FOUND #5 REBAR, (3) WITH A CURVE TO THE LEFT HAVING A RADIUS OF 475.56 AN ARC LENGTH OF 74.45' AND A CHORD BEARING AND DISTANCE OF N 18-58-52 E 74.37' TO A SET #5 REBAR A COMMON CORNER WITH WESTMORELAND FARM SUBDIVISION AS RECORDED IN MAP BOOK 26 PG 459 COMMON OPEN SPACE AND LOTS 21 AND 22, THENCE WITH WESTMORELAND FARM THE FOLLOWING TWO (2) COURSES AND DISTANCES; (1) S 77-34-21 E, PASSING A FOUND #4 REBAR AT 49.90' AND AT 297.69', A TOTAL DISTANCE OF 339.07' TO A FOUND #4 REBAR, (2) N 87-01-41 E 160.75' TO A FOUND #5 REBAR A COMMON CORNER WITH BARBARA MARKHAM & JOHN MARKHAM AS RECORDED IN DEED BOOK 25973 PAGE 911 MAP BOOK 32 PAGE 527 OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE COMMON LINE OF MARKHAM THE FOLLOWING TWO (2) COURSES AND DISTANCES; (1) S 00-10-06 E 67.99' TO A FOUND 1" REBAR, (2) N 89-39-55 E, PASSING A FOUND 1" REBAR AT 270.32', A TOTAL DISTANCE OF 300.03' TO A SET MAG NAIL IN THE CENTER OF DAVIDSON-CONCORD ROAD SR# 2693, THENCE WITH THE CENTER OF DAVIDSON-CONCORD ROAD, THE FOLLOWING FIVE (5) COURSES AND DISTANCES; (1) WITH A CURVE TO THE LEFT HAVING A RADIUS OF 5135.60' AN ARC LENGTH OF 102.40' AND A CHORD BEARING AND DISTANCE OF S 02-43-57 E 102.40' TO A SET MAG NAIL, (2) WITH A CURVE TO THE LEFT HAVING A RADIUS OF 1541.30' AN ARC LENGTH OF 113.70' AND A CHORD BEARING AND DISTANCE OF S 05-25-00 E 113.67' TO A SET MAG NAIL, (3) S 07-31-48 E 39.21' TO A SET MAG NAIL, (4) WITH A CURVE TO THE LEFT HAVING A RADIUS OF 3766.66' AN ARC LENGTH OF 249.04' A CHORD BEARING AND DISTANCE OF S 09-25-27 E 248.99' TO A POINT, (5) S 11-19-06 E 51.63' TO A POINT, THENCE WITH NEW LINES THE FOLLOWING EIGHT (8) COURSES AND DISTANCES: (1) S 78-40-54 W 20.00' TO A SET #5 REBAR, (2) N 11-18-53 W 51.63' TO A SET #5 REBAR, (3) WITH A CURVE TO THE RIGHT HAVING A RADIUS OF 3786.66' AN ARC LENGTH OF 222.72' AND A CHORD BEARING AND DISTANCE OF N 09-38-00 W 222.69' TO A SET #5 REBAR, (4) S 82-32-07 W 168.84' TO A SET #5 REBAR, (5) S 13-42-04 E 36.79' TO A SET

#5 REBAR, (6) S 70-48-13 W 151.26' TO A SET #5 REBAR, (7) S 11-47-30 E 153.00' TO A SET #5 REBAR, (8) WITH A CURVE TO THE LEFT HAVING A RADIUS OF 305.00' AN ARC LENGTH OF 138.61' AND A CHORD BEARING AND DISTANCE OF S 24-48-38 E 137.42' TO THE POINT AND PLACE OF BEGINNING CONTAINING 85.640 ACRES MORE OR LESS.

### **SOUTH PARCEL**

COMMENCING FROM NCGS MONUMENT "HOPEWELL RESET" HAVING NORTH CAROLINA NAD 83/2011 GRID COORDINATES N:629,715.64, E:1,459,878.15 AND A COMBINED GRID FACTOR OF 0.99984864, PROCEED N 19-24-06 W 2328.15'(GROUND DISTANCE), 2327.80' (GRID DISTANCE) TO THE POINT OF BEGINNING A SET MAG NAIL IN THE MARGIN OF DAVIDSON-CONCORD ROAD SR# 2693, SAID NAIL BEING A COMMON CORNER WITH CHARLES H. RICHARDS & YVONNE W. RICHARDS AS RECORDED IN DEED BOOK 4954, PAGE 469 OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE LINE WITH RICHARDS THE FOLLOWING TWO (2) COURSES AND DISTANCES; (1) S 30-24-42 W, PASSING A FOUND STONE AT 29.88', A TOTAL DISTANCE OF 670.41' TO A FOUND 1" REBAR, (2) S 61-46-45 W 382.61' TO A FOUND 1.25" PIPE, A COMMON CORNER WITH HEATHER HELMS & JASON HELMS AS RECORDED IN DEED BOOK 28880, PAGE 429 AS RECORDED IN THE MECKLENBURG COUNTY REGISTRY THENCE WITH THE COMMON LINE OF HELMS THE FOLLOWING TEN (10) COURSES AND DISTANCES; (1) N 46-16-30 W, PASSING A FOUND #5 REBAR AT 546.10', A TOTAL DISTANCE OF 571.10' TO A POINT IN THE SOUTH PRONG WEST BRANCH ROCKY RIVER TRIBUTARY, (2) S 63-31-46 W 29.24' TO A POINT, (3) S 54-02-45 W 89.01' TO A POINT, (4) S 49-37-44 W 33.77' TO A POINT, (5) S 38-19-42 W 50.80' TO A POINT, (6) S 26-29-36 W 70.18' TO A POINT, (7) S 36-49-08 W 39.33' TO A POINT, (8) S 30-56-26 W 72.76' TO A POINT, (9) S 30-56-26 W 12.63' TO A POINT, (10) S 17-25-12 W 18.92', A COMMON CORNER WITH 606 FIELDING ROAD, LLC AS RECORDED IN DEED BOOK 26458 PAGE 442 IN THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE COMMON WITH 606 FIELDING ROAD, LLC THE FOLLOWING THREE (3) COURSES AND DISTANCES; (1) S 33-22-06 W 234.02' TO A POINT, (2) S 42-06-29 W 59.97' TO A POINT, (3) S 12-04-31 E 46.32' TO A POINT, A COMMON CORNER WITH MILDRED M. HARRINGTON AS RECORDED IN DEED BOOK 21616 PAGE 247 OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE COMMON LINE WITH HARRINGTON THE FOLLOWING FOUR (4) COURSES AND DISTANCES; (1) S 26-10-38 W 51.24' TO A POINT, (2) S 10-38-38 W 58.86' TO A POINT, (3) S 32-21-38 W 345.98' TO A POINT, (4) S 36-50-46 W 149.56' TO A POINT, A COMMON CORNER WITH CAROL C. ALLEY & TED F. ALLEY AS RECORDED IN DEED BOOK 6268 PAGE 642 OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE COMMON LINE WITH ALLEY THE FOLLOWING TWO (2) COURSES AND DISTANCES; (1) S 35-48-38 W 294.74' TO A POINT, (2) S 71-59-38 W 113.31' TO A POINT, A COMMON CORNER WITH BLUESTREAM PARTNERS, LLC AS RECORDED IN DEED BOOK 23207 PAGE 803 OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE COMMON LINE OF BLUESTREAM PARTNERS LEAVING THE SOUTH PRONG WEST BRANCH ROCKY RIVER TRIBUTARY N 47-14-52 W 118.80' TO A FOUND 1" REBAR, A COMMON CORNER WITH THE CHARLOTTE-MECKLENBURG BOARD OF

EDUCATION AS RECORDED IN DEED BOOK 29949 PAGE 722, THENCE WITH THE COMMON LINE OF CHARLOTTE-MECKLENBURG N 38-33-34 E 35.44' TO A FOUND #4 REBAR, A COMMON CORNER WITH M/I HOMES OF CHARLOTTE, LLC AS RECORDED IN DEED BOOK 29353 PAGES 794 AND 805 OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE COMMON LINE OF M/I HOMES THE FOLLOWING THREE (3) COURSES AND DISTANCES; (1) N 38-33-34 E 1096.26' TO A FOUND #4 REBAR, (2) N 64-14-55 W 345.90' TO A FOUND NAIL IN ROOT WITH IRON BAR WITNESS, (3) N 64-15-08 W 338.60' TO A FOUND 1" PIPE, A COMMON CORNER WITH BAILEY SPRINGS SUBDIVISION MAP 3 AS RECORDED IN MAP BOOK 49 PAGE 979, MAP BOOK 54 PAGE 480 OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE COMMON LINE OF BAILEY SPRINGS SUBDIVISION; N 32-04-09 E, PASSING A FOUND #5 REBAR AT 341.82 A FOUND #5 REAR AT 470.68, A TOTAL DISTANCE OF 514.36' TO A FOUND #5 REBAR A COMMON CORNER WITH THE TOWN OF DAVIDSON AS RECORDED IN DEED BOOK 28922 PAGE 407, MAP BOOK 49 PAGE 979 OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE COMMON LINE OF THE TOWN OF DAVIDSON THE FOLLOWING TWO (2) COURSES AND DISTANCES; (1) N 32-04-09 E, PASSING A FOUND AXLE AT 488.99', A TOTAL DISTANCE OF 510.17' TO POINT IN THE SOUTH PRONG WEST BRANCH ROCKY RIVER, (2) N 39-46-58 W 836.91' TO A POINT, ON THE SOUTHERN RIGHT-OF-WAY OF ROBERT WALKER DRIVE HAVING A 60' RIGHT-OF-WAY AS RECORDED IN DEED BOOK 19009 PAGE 410 OF THE MECKLENBURG COUNTY REGISTRY, THENCE WITH THE RIGHT OF WAY OF ROBERT WALKER DRIVE THE FOLLOWING FOUR (4) COURSES AND DISTANCES: LEAVING THE SOUTH PRONG WEST BRANCH ROCKY RIVER (1) N 53-11-48 E 220.10' TO A SET #5 REBAR, (2) WITH A CURVE TO THE LEFT HAVING A RADIUS OF 14,980.08' AN ARC LENGTH OF 811.69' A CHORD BEARING AND DISTANCE OF N 51-38-26 E 811.59' TO A SET #5 REBAR, (3) N 50-04-44 E 100.00' TO A SET #5 REBAR, (4) WITH A CURVE TO THE RIGHT HAVING A RADIUS OF 721.27 AN ARC LENGTH OF 91.82 A CHORD BEARING AND DISTANCE OF N 53-43-34 E 91.76' TO A SET #5 REBAR A NEW CORNER, THENCE WITH THE FOLLOWING TWO (2) NEW LINES, (1) S 36-30-17 E 517.53' TO A SET #5 REBAR, (2) N 34-28-08 E 174.93' TO A SET #5 REBAR ON THE AFFOREMENTIONED RIGHT-OF-WAY OF ROBERT WALKER DRIVE, THENCE WITH THE RIGHT-OF-WAY THE FOLLOWING NINE (9) COURSES AND DISTANCES, (1) WITH A CURVE TO THE LEFT HAVING A RADIUS OF 2155.84 AN ARC LENGTH OF 148.16' A CHORD BEARING AND DISTANCE OF S 26-04-14 E 148.13' TO A SET #5 REBAR, (2) S 28-02-11 E 137.64' TO A SET #5 REBAR, (3) WITH A CURVE TO THE RIGHT HAVING A RADIUS OF 150.00' AN ARC LENGTH OF 10.37' A CHORD BEARING AND DISTANCE OF S 26-03-35 E 10.37' TO A SET #5 REBAR, (4) WITH A CURVE TO THE RIGHT HAVING A RADIUS OF 79250.81' AN ARC LENGTH OF 122.42' A CHORD BEARING AND DISTANCE OF N 24-02-04 W 122.42' TO A SET #5 REBAR, (5) N 23-59-24 W 65.59' TO A SET #5 REBAR, (6) WITH A CURVE TO THE RIGHT HAVING A RADIUS OF 4991.01' AN ARC LENGTH OF 84.10' A CHORD BEARING AND DISTANCE OF N 23-30-27 W 84.10' TO A SET #5 REBAR, (7) WITH A CURVE TO THE RIGHT HAVING A RADIUS OF 2786.18' AN ARC LENGTH OF 402.57' A CHORD BEARING AND DISTANCE OF N 18-53-07 W 402.22' TO A SET #5 REBAR, (8) N 14-44-46 W 88.45' TO A SET #5 REBAR, (9) N 11-19-06 W 11.85' TO A SET #5 REBAR, THENCE WITH A NEW LINE N 78-40-54 E 20.00' TO A POINT IN THE CENTER OF THE

AFOREMENTIONED DAVIDSON-CONCORD ROAD SR# 2693, THENCE WITH THE CENTER OF DAVIDSON-CONCORD ROAD, THE FOLLOWING EIGHT (8) COURSES AND DISTANCES, (1) S 11-19-06 E 11.23' TO A SET MAG NAIL, (2) S 14-44-46 E 87.85' TO A SET MAG NAIL, (3) WITH A CURVE TO THE LEFT HAVING A RADIUS OF 2766.18' AN ARC LENGTH OF 399.68' A CHORD BEARING AND DISTANCE OF S 18-53-07 E 399.33' TO SET MAG NAIL, (4) WITH A CURVE TO THE LEFT HAVING A RADIUS OF 4971.01' AN ARC LENGTH OF 83.77' A CHORD BEARING AND DISTANCE OF S 23-30-27 E 83.77' TO A SET MAG NAIL, (5) S 23-59-24 E 65.59' TO A SET MAG NAIL, (6) WITH A CURVE TO THE LEFT HAVING A RADIUS OF 79230.81' AN ARC LENGTH OF 696.34' A CHORD BEARING AND DISTANCE OF S 24-14-31 E 696.34' TO A SET MAG NAIL, (7) S 24-29-37 E 619.17' TO A SET MAG NAIL, (8) S 23-42-42 E 177.18' TO THE POINT OF BEGINNING CONTAINING 79.613 ACRES MORE OR LESS.



**EXHIBIT B**

PARKW

200 South Ocean Street, Suite 1A-01  
Charlotte, North Carolina 28202  
919 256 7175 FAX 919 210 7053

Lennar Carolinas, LLC

11230 CARMEL COMMONS BLVD  
CHARLOTTE, NC 28226

### WestBranch (Residential)

ROBERT WALKER DRIVE  
DAVIDSON, NC 28036

## Schematic Site Plan

THE PLAN IS CONFORMANT IN NATURE AND LOCATION OF WORKS, LOTS AND OTHER AREAS AND IMPROVEMENTS ARE SUBJECT TO FINAL DETERMINATION ON PRELIMINARY AND FINAL PLAN.

Project No.  
4418  
Issued  
12/20/14

Revised

07/27/2016 - TOWN COMMENTS  
07/29/2016 - TOWN AND COUNTY COMMENTS  
07/19/2016 - TOWN AND COUNTY COMMENTS



SCALE: 1"=200'

SP-1.0

the design. The project method used the design matrix  
to obtain an estimate of the effect of the design factors.  
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obtain an estimate of the effect of the design factors.









Shaping the Environment  
Honoring the Professionals

Land Planning  
Landscape Architecture  
Civil Engineering  
Urban Design

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Lennar Carolinas, LLC

11230 CARMEL COMMONS BLVD  
CHARLOTTE, NC 28226

WestBranch  
(Residential)

ROBERT WALKER DRIVE  
DAVIDSON, NC 28036

# SCHEMATIC GRADING AND STORMWATER PLAN

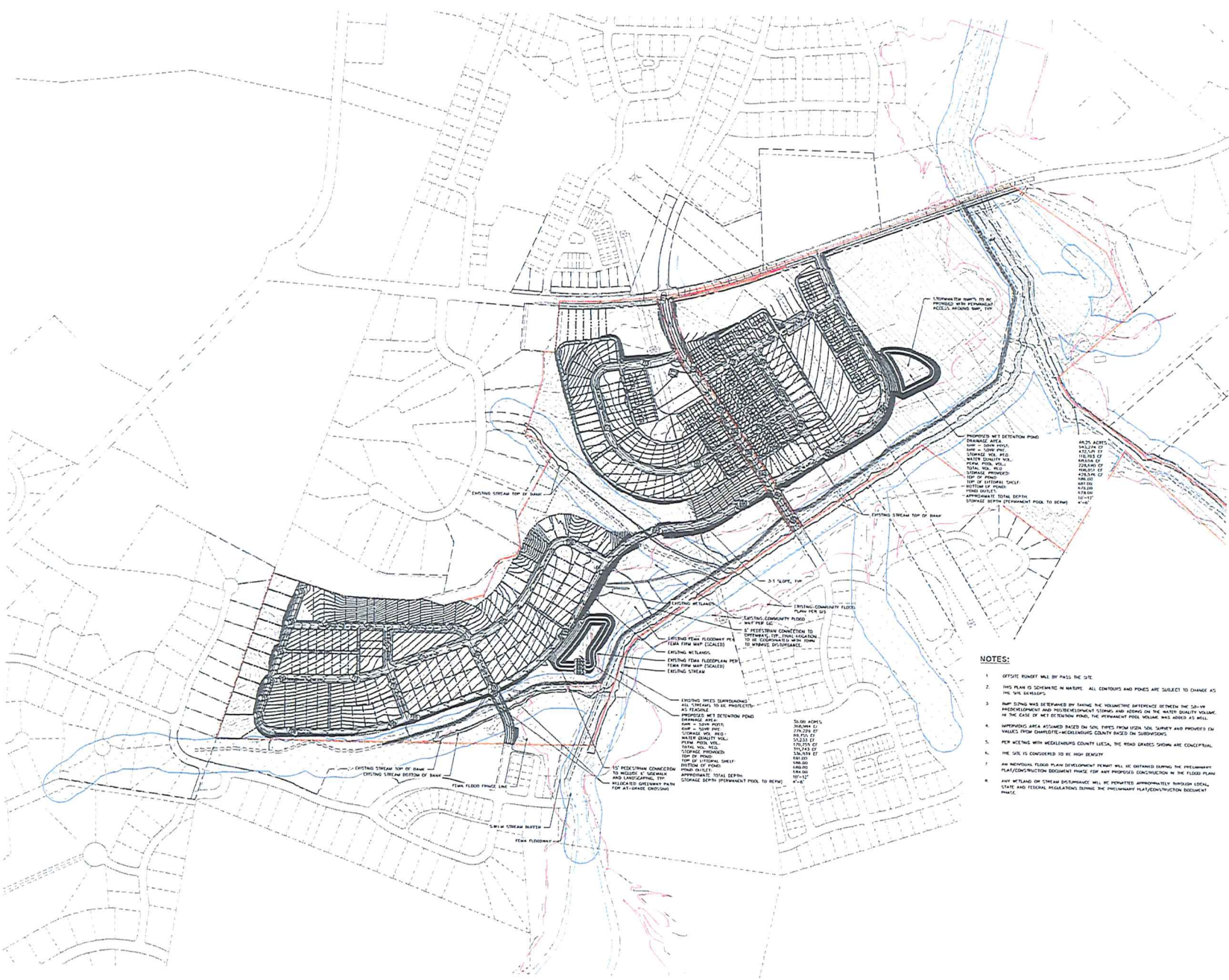
THIS PLAN IS SCHEMATIC IN NATURE AND LOCATION OF  
FEATURES, LOTS AND GROUP, SETBACKS AND SPACING ARE  
SUBJECT TO FINAL DETERMINATION OF PRELIMINARY  
AND FINAL PLAN.

Project No.  
4418

Issued  
6/14/2014

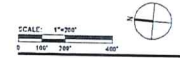
Revised

REVISIONS - TIME AND COUNTY COMMENTS



## NOTES:

1. OFFSITE RUNOFF SHALL BE PASS THE SITE.
2. THIS PLAN IS SCHEMATIC IN NATURE. ALL CONTENTS AND NOTES ARE SUBJECT TO CHANGE AS THE SITE DEVELOPS.
3. BASE ELEVATIONS WERE DETERMINED BY TAKING THE VOLUMETRIC DIFFERENCE BETWEEN THE SUB-UN DEVELOPMENT AND THE EXISTING TERRAIN AND ADDING TO THE WATER QUALITY VOLUME. IN THE CASE OF WET DETENTION POND, THE PERMANENT POOL VOLUME WAS ADDED AS WELL.
4. IMPROVEMENT AREA ATTACHED BASED ON 10% TYPICAL FROM USGS 50% SURVEY AND PROVIDED IN VALUES FROM COMPOSITE-MIDDLE-CLASS COUNTY BASED IN SUBURBS.
5. PER MEETING WITH MIDDLEBURY COUNTY LUCAS, THE ROAD GRADIES SHOWN ARE CONCEPTUAL.
6. THE SITE IS CONSIDERED TO BE HIGH DENSITY.
7. AN INDIVIDUAL FLOOD PLAIN DEVELOPMENT PERMIT WILL BE OBTAINED DURING THE PRELIMINARY PLANNING/CONSTRUCTION DOCUMENT PHASE FOR ANY PROPOSED CONSTRUCTION IN THE FLOOD PLAIN.
8. ANY WETLAND OR CREEK DISTURBANCE WILL BE PERMITTED APPROPRIATELY THROUGH LOCAL, STATE AND FEDERAL REGULATIONS DURING THE PRELIMINARY PLANNING/CONSTRUCTION DOCUMENT PHASE.



SCALE: 1"=200'  
0 100' 200' 400'

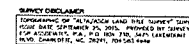
SW-1.0

The drawings, the project manual and the design vision  
form an agreement of intent and a plan of work. The  
responsibility for the successful completion of the project  
rests with the owner and the architect. The architect  
is not responsible for the success or failure of the project.

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This is a detailed technical map of a coastal area, likely a wetland or marsh. The map shows various land parcels, water bodies, and infrastructure. Key features include:

- Land Parcels:** Numerous parcels are labeled with numbers and coordinates, such as L-12142, L-12143, L-12144, and L-12145. Other labels include "L-12146", "L-12147", "L-12148", "L-12149", "L-12150", "L-12151", "L-12152", "L-12153", "L-12154", "L-12155", "L-12156", "L-12157", "L-12158", "L-12159", "L-12160", "L-12161", "L-12162", "L-12163", "L-12164", "L-12165", "L-12166", "L-12167", "L-12168", "L-12169", "L-12170", "L-12171", "L-12172", "L-12173", "L-12174", "L-12175", "L-12176", "L-12177", "L-12178", "L-12179", "L-12180", "L-12181", "L-12182", "L-12183", "L-12184", "L-12185", "L-12186", "L-12187", "L-12188", "L-12189", "L-12190", "L-12191", "L-12192", "L-12193", "L-12194", "L-12195", "L-12196", "L-12197", "L-12198", "L-12199", "L-12200".
- Water Bodies:** Several water bodies are labeled, including "L-12142", "L-12143", "L-12144", "L-12145", "L-12146", "L-12147", "L-12148", "L-12149", "L-12150", "L-12151", "L-12152", "L-12153", "L-12154", "L-12155", "L-12156", "L-12157", "L-12158", "L-12159", "L-12160", "L-12161", "L-12162", "L-12163", "L-12164", "L-12165", "L-12166", "L-12167", "L-12168", "L-12169", "L-12170", "L-12171", "L-12172", "L-12173", "L-12174", "L-12175", "L-12176", "L-12177", "L-12178", "L-12179", "L-12180", "L-12181", "L-12182", "L-12183", "L-12184", "L-12185", "L-12186", "L-12187", "L-12188", "L-12189", "L-12190", "L-12191", "L-12192", "L-12193", "L-12194", "L-12195", "L-12196", "L-12197", "L-12198", "L-12199", "L-12200".
- Infrastructure:** The map shows a network of roads, including "L-12142", "L-12143", "L-12144", "L-12145", "L-12146", "L-12147", "L-12148", "L-12149", "L-12150", "L-12151", "L-12152", "L-12153", "L-12154", "L-12155", "L-12156", "L-12157", "L-12158", "L-12159", "L-12160", "L-12161", "L-12162", "L-12163", "L-12164", "L-12165", "L-12166", "L-12167", "L-12168", "L-12169", "L-12170", "L-12171", "L-12172", "L-12173", "L-12174", "L-12175", "L-12176", "L-12177", "L-12178", "L-12179", "L-12180", "L-12181", "L-12182", "L-12183", "L-12184", "L-12185", "L-12186", "L-12187", "L-12188", "L-12189", "L-12190", "L-12191", "L-12192", "L-12193", "L-12194", "L-12195", "L-12196", "L-12197", "L-12198", "L-12199", "L-12200".
- Callouts:** Several callouts are present, including "EXISTING FLOODPLAIN PER FEMA FIRM 100-100-0000", "EXISTING FLOODPLAIN PER FEMA FIRM 100-100-0000", "EXISTING FLOODPLAIN PER FEMA FIRM 100-100-0000", "EXISTING FLOODPLAIN PER FEMA FIRM 100-100-0000", "EXISTING FLOODPLAIN PER FEMA FIRM 100-100-0000", "EXISTING FLOODPLAIN PER FEMA FIRM 100-100-0000", "EXISTING FLOODPLAIN PER FEMA FIRM 100-100-0000", "EXISTING FLOODPLAIN PER FEMA FIRM 100-100-0000", "EXISTING FLOODPLAIN PER FEMA FIRM 100-100-0000", "EXISTING FLOODPLAIN PER FEMA FIRM 100-100-0000".
- Orientation:** The map is oriented with North at the top.
- Title:** The map is titled "Map of the Coastal Area".
- Date:** The map is dated "1998".



**Lennar Carolinas, LLC**

## WestBranch (Residential)

## ENVIRONMENTAL INVENTORY

Revised



SP-2.0

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Tree Point	Diameter in	Type
1	12	GALE
2	12	GALE
3	24	GALE
4	15	GALE
5	12	GALE
6	15	GALE
7	12	GALE
8	12	GALE
9	12	GALE
10	15	GALE
11	12	GALE
12	12	GALE
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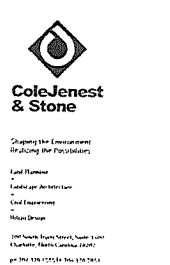
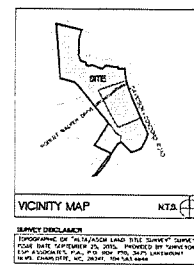
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Tree Point	Diameter in	Type
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Tree Point	Diameter in	Type
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Lennar Carolinas, LLC

11230 CARREL COMMONS BLVD  
CHARLOTTE, NC 28226

WestBranch  
(Residential)

ROBERT WALKER DRIVE  
DAVIDSON, NC 28036

ENVIRONMENTAL  
INVENTORY

Project No.  
4418

Issued  
10/26/11

Revised  
10/26/11

10/26/11 - 10/26/11 COUNTY COMMISSION

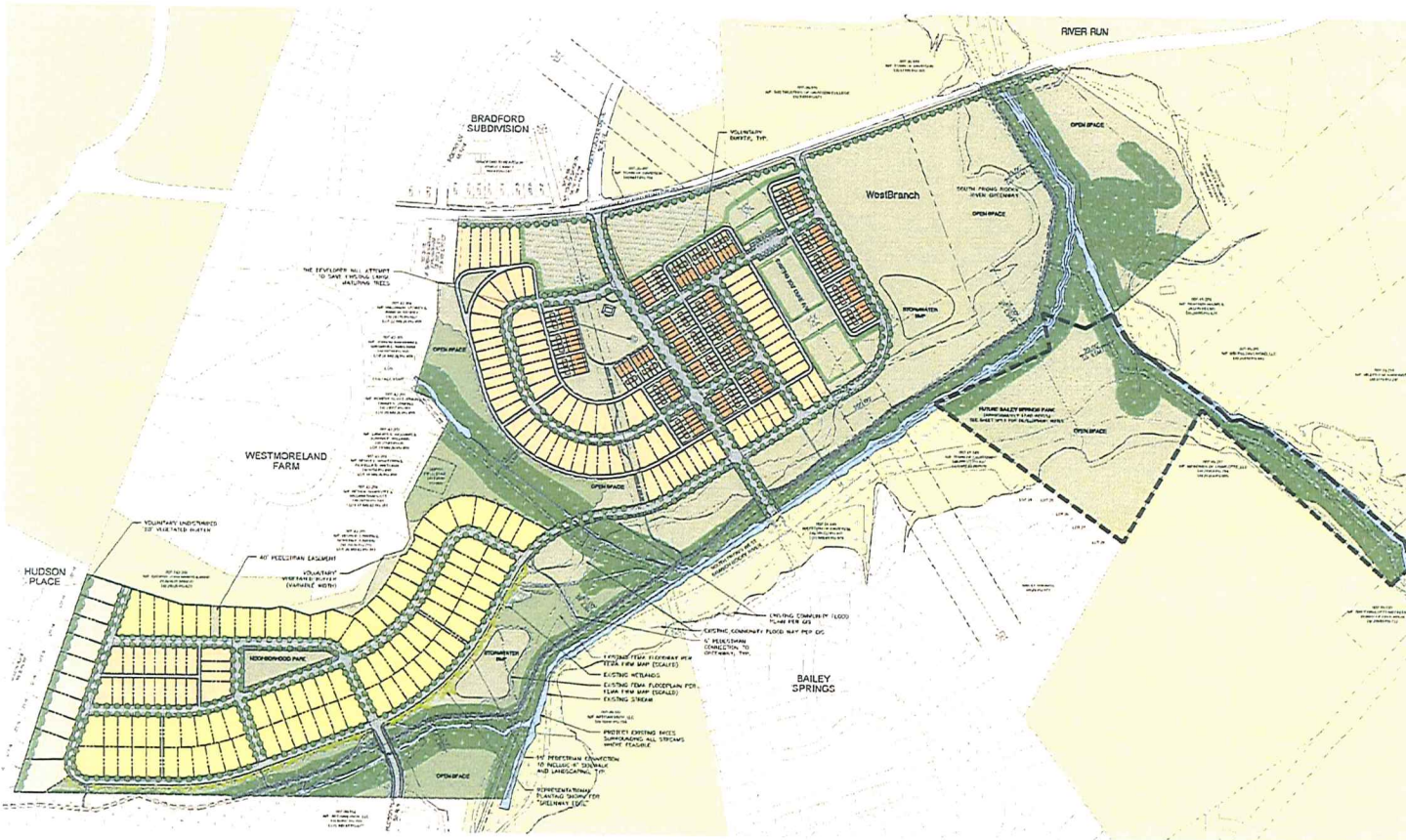
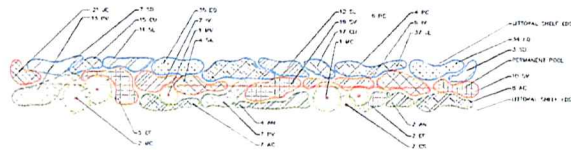


Tree Point	Diameter in	Type
401	12	GALE
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416	12	GALE
417	12	

# PLANT SCHEDULE/WET POND - LITTORAL SHELF

RATIO 1:10	SYM	# PER SQUARE FOOT	COMMON NAME	BOTANICAL NAME	SIZE	ROOT SPACING
1:10	1	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	2	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	3	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	4	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	5	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	6	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	7	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	8	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	9	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	10	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	11	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	12	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	13	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	14	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	15	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	16	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	17	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	18	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	19	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"
1:10	20	1	WATER LILY	Najas, Elodea, Sagittaria	1.5 GAL	12" x 12"

NOTE:  
THIS IS AN EXAMPLE OF A TYPICAL WET POND LITTORAL SHELF PLANTING DESIGN. FINAL DESIGN TO BE COMPLETED DURING PRELIMINARY  
PLANNING/CONSTRUCTION PHASES.



**VICINITY MAP**  
NTS

**LEGEND**

- LARGES MATURING TREES
- 40' x 10'
- PINOIS, AMERICAN ELM
- REDBELL, MILLER, LUM
- WHITE OAK, RED OAK
- HIGHTON, REDBELL, LUM
- FRANKLIN, HIGHTON, LUM
- 10' x 10'
- 10' x 10'

- SMALL MATURING TREES
- 20' x 10'
- DOGWOOD
- LAR, WACHSIA
- CEDAR
- COMMERCIAL CHERRY
- HONEYDEW
- CHERRY, WHITE

- VOLUNTARY BUFFER
- 10' x 10'
- LARGES MATURING TREES
- SMALL MATURING TREES
- 10' x 10'
- 10' x 10'
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- 10' x 10'
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- VOLUNTARY BUFFER
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- SMALL MATURING TREES
- 10' x 10'
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- 10' x 10'

NOTE:  
PLANTING NOTES IN LEGEND ARE LAYERS OF  
TREES AND OTHER LANDSCAPING THAT MAY BE  
USED IN THE FUTURE. THE FINAL PLANTING  
DESIGN WILL BE DETERMINED DURING  
PRELIMINARY PLANNING.

Project No.  
4418  
Issued  
10/20/18

Revised  
10/20/18 - TIME COMMENTS  
10/20/18 - TIME AND COUNTY COMMENTS  
10/20/18 - TIME AND COUNTY COMMENTS

1. CONTRACTOR IS FULLY RESPONSIBLE FOR CONTACTING  
APPROPRIATE AGENCIES AND OBTAINING ALL NECESSARY  
PERMITS PRIOR TO CONSTRUCTION.

2. CONTRACTOR IS RESPONSIBLE FOR OBTAINING ALL NECESSARY  
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3. ALL PLANTING MUST BE DONE BY THE CONTRACTOR. THE  
CONTRACTOR SHALL BE RESPONSIBLE FOR OBTAINING ALL  
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**ColeJenest & Stone**  
Creating the Environment  
Realizing the Possibilities

Land Planning  
• Surveying/Mapping  
• Civil Engineering  
• Urban Design

200 South Street, Suite 100  
Charlotte, North Carolina 28202  
919.286.1000  
www.colejenestandstone.com

**Lennar Carolinas, LLC**

11230 CAMEL COMMONS BLVD  
CHARLOTTE, NC 28226

**WestBranch  
(Residential)**

ROBERT WALKER DRIVE  
DAVIDSON, NC 28036

**Schematic  
Landscape Plan**

NOT TO SCALE. COMMENTS IN LAYOUT AND EXPLANATION TO  
BE MADE. THIS PLAN IS A PRELIMINARY DESIGN AND IS NOT  
TO BE USED FOR CONSTRUCTION. THE FINAL DESIGN  
WILL BE DETERMINED DURING PRELIMINARY PLANNING.

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**CERTIFICATE OF SUFFICIENCY**  
**WESTBRANCH**

To the Board of Commissioners of the Town of Davidson, North Carolina:

I, Carmen Clemsic, do hereby certify that I have investigated the attached petition and hereby make the following findings:

- a. The petition from Lennar Carolinas, LLC contains an adequate property description of the area proposed for annexation.
- b. The area described in the petition is contiguous to the Town of Davidson primary corporate limits, as defined by G.S. 160A-31.
- c. The petition is signed by and includes addresses of all owners of real property lying in the area described therein.
- d. The parcels subject to this Annexation Petition are already subject to the Town of Davidson's zoning jurisdiction. The owner claims all vested rights that attach to the site pursuant to all issued and valid permits, including but not limited to the Master Plan, Project Name: WestBranch (Residential), Robert Walker Dr (see attached Master Plan).

In witness, whereof, I have hereunto set my hand and affixed the seal of the Town of Davidson, this 9th day of March, 2017.



  
Carmen Clemsic, Town Clerk



---

**Agenda Title:** Consider Approval of Resolution 2017-09 Bailey Springs Affordable Housing - Town Attorney/Affordable Housing Manager Cindy Reid

**Summary:**

---

**ATTACHMENTS:**

	<b>Description</b>	<b>Upload Date</b>	<b>Type</b>
▢	R2017-09 - Authorizing Acceptance of Final Offer - Bailey Springs	3/13/2017	Resolution Letter



## RESOLUTION 2017-09

### RESOLUTION AUTHORIZING ACCEPTANCE OF FINAL OFFER

WHEREAS, the Town Board of Commissioners on February 14, 2017, authorized the upset bid process for property (“the property”), shown on Exhibit A, by the Town that has been set aside for the development of affordable housing; and

WHEREAS, as required by NCGS 160A-269, the Town Clerk caused a notice of the offer to be published. The notice described the property, the amount and terms of the offer, stated the terms under which the offer may be upset; and

WHEREAS, the upset bid period has passed and an upset bid was not received; and

WHEREAS, the Board of Commissioners desires to approve the final high offer.

THEREFORE, THE BOARD OF COMMISSIONERS OF THE TOWN OF DAVIDSON RESOLVES THAT that:

The Final Offer submitted by JCB Urban Company is hereby accepted.

The Town Manager or Assistant Town Manager is authorized to execute the contract with JCB Urban Company and to convey the property to JCB Urban Company pursuant to the terms of the contract.

Adopted March 14, 2017.

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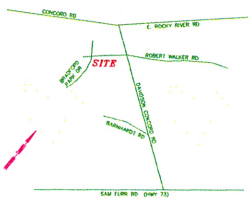
John M. Woods  
Mayor

Attest

---

Carmen Clemsic  
Town Clerk





VICINITY MAP  
NO SCALE

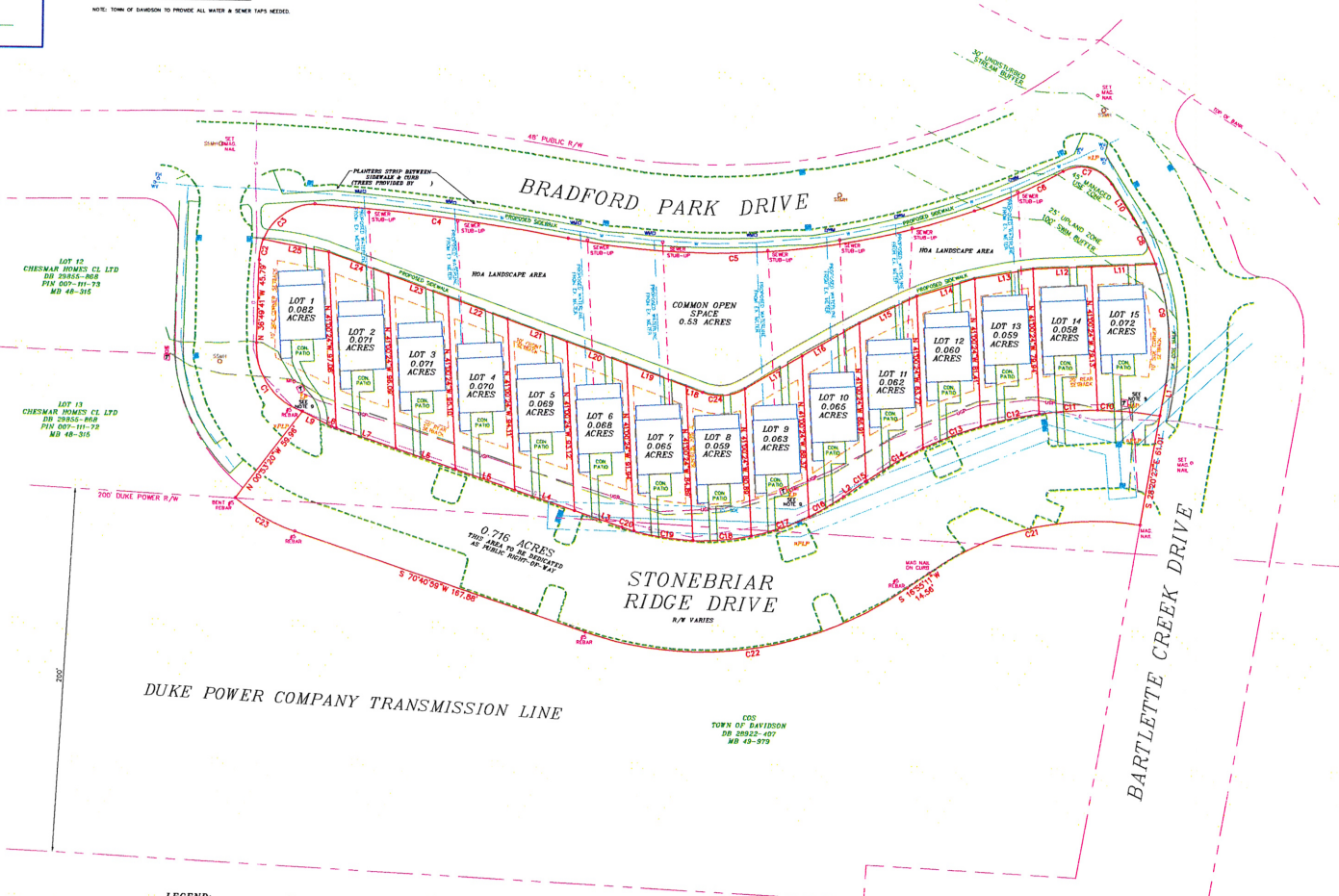
WATER/SEWER CONNECTION AVAILABILITY TABLE

LOT #	WATER METER	SEWER TAP
LOT 1	NEEDED	NEEDED
LOT 2	EXISTING	EXISTING
LOT 3	NEEDED	NEEDED
LOT 4	EXISTING	EXISTING
LOT 5	NEEDED	NEEDED
LOT 6	EXISTING	EXISTING
LOT 7	EXISTING	EXISTING
LOT 8	NEEDED	NEEDED
LOT 9	EXISTING	EXISTING
LOT 10	EXISTING	EXISTING
LOT 11	EXISTING	EXISTING
LOT 12	EXISTING	EXISTING
LOT 13	NEEDED	NEEDED
LOT 14	EXISTING	EXISTING
LOT 15	NEEDED	NEEDED

NOTE: TOWN OF DAVIDSON TO PROVIDE ALL WATER & SEWER TAPS NEEDED.

I, RUFUS JACKSON LOVE, CERTIFY THAT THIS MAP WAS DRAWN FROM AN ACTUAL SURVEY UNDER MY DIRECT SUPERVISION, THAT THE RATIO OF REDUCTION IS 1:10,000+ BEFORE ADJUSTMENTS, AND THAT THE MAGNITUDE WAS 1:7.5 BEFORE FOR TOWN.

WITNESS MY HAND AND OFFICIAL SEAL THIS \_\_\_\_ DAY OF \_\_\_\_\_  
RUFUS JACKSON LOVE  
LICENSE NO. \_\_\_\_\_ PROFESSIONAL LAND SURVEYOR



Curve	Radius	Length	Chord	Chord Bear
C1	31.00	11.12	11.12	0.000000
C2	170.00	10.36	10.36	0.187200
C3	228.00	10.33	10.33	0.272800
C4	158.00	10.33	10.33	0.272800
C5	158.00	10.33	10.33	0.272800
C6	218.00	10.32	10.32	0.282200
C7	218.00	10.32	10.32	0.282200
C8	218.00	10.32	10.32	0.282200
C9	218.00	10.32	10.32	0.282200
C10	218.00	10.32	10.32	0.282200
C11	218.00	10.32	10.32	0.282200
C12	218.00	10.32	10.32	0.282200
C13	218.00	10.32	10.32	0.282200
C14	218.00	10.32	10.32	0.282200
C15	218.00	10.32	10.32	0.282200
C16	218.00	10.32	10.32	0.282200
C17	218.00	10.32	10.32	0.282200
C18	218.00	10.32	10.32	0.282200
C19	218.00	10.32	10.32	0.282200
C20	218.00	10.32	10.32	0.282200
C21	218.00	10.32	10.32	0.282200
C22	218.00	10.32	10.32	0.282200
C23	218.00	10.32	10.32	0.282200
C24	218.00	10.32	10.32	0.282200
C25	218.00	10.32	10.32	0.282200
C26	218.00	10.32	10.32	0.282200
C27	218.00	10.32	10.32	0.282200
C28	218.00	10.32	10.32	0.282200
C29	218.00	10.32	10.32	0.282200
C30	218.00	10.32	10.32	0.282200
C31	218.00	10.32	10.32	0.282200
C32	218.00	10.32	10.32	0.282200
C33	218.00	10.32	10.32	0.282200
C34	218.00	10.32	10.32	0.282200
C35	218.00	10.32	10.32	0.282200
C36	218.00	10.32	10.32	0.282200
C37	218.00	10.32	10.32	0.282200
C38	218.00	10.32	10.32	0.282200
C39	218.00	10.32	10.32	0.282200
C40	218.00	10.32	10.32	0.282200
C41	218.00	10.32	10.32	0.282200
C42	218.00	10.32	10.32	0.282200
C43	218.00	10.32	10.32	0.282200
C44	218.00	10.32	10.32	0.282200
C45	218.00	10.32	10.32	0.282200
C46	218.00	10.32	10.32	0.282200
C47	218.00	10.32	10.32	0.282200
C48	218.00	10.32	10.32	0.282200
C49	218.00	10.32	10.32	0.282200
C50	218.00	10.32	10.32	0.282200
C51	218.00	10.32	10.32	0.282200
C52	218.00	10.32	10.32	0.282200
C53	218.00	10.32	10.32	0.282200
C54	218.00	10.32	10.32	0.282200
C55	218.00	10.32	10.32	0.282200
C56	218.00	10.32	10.32	0.282200
C57	218.00	10.32	10.32	0.282200
C58	218.00	10.32	10.32	0.282200
C59	218.00	10.32	10.32	0.282200
C60	218.00	10.32	10.32	0.282200
C61	218.00	10.32	10.32	0.282200
C62	218.00	10.32	10.32	0.282200
C63	218.00	10.32	10.32	0.282200
C64	218.00	10.32	10.32	0.282200
C65	218.00	10.32	10.32	0.282200
C66	218.00	10.32	10.32	0.282200
C67	218.00	10.32	10.32	0.282200
C68	218.00	10.32	10.32	0.282200
C69	218.00	10.32	10.32	0.282200
C70	218.00	10.32	10.32	0.282200
C71	218.00	10.32	10.32	0.282200
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C73	218.00	10.32	10.32	0.282200
C74	218.00	10.32	10.32	0.282200
C75	218.00	10.32	10.32	0.282200
C76	218.00	10.32	10.32	0.282200
C77	218.00	10.32	10.32	0.282200
C78	218.00	10.32	10.32	0.282200
C79	218.00	10.32	10.32	0.282200
C80	218.00	10.32	10.32	0.282200
C81	218.00	10.32	10.32	0.282200
C82	218.00	10.32	10.32	0.282200
C83	218.00	10.32	10.32	0.282200
C84	218.00	10.32	10.32	0.282200
C85	218.00	10.32	10.32	0.282200
C86	218.00	10.32	10.32	0.282200
C87	218.00	10.32	10.32	0.282200
C88	218.00	10.32	10.32	0.282200
C89	218.00	10.32	10.32	0.282200
C90	218.00	10.32	10.32	0.282200
C91	218.00	10.32	10.32	0.282200
C92	218.00	10.32	10.32	0.282200
C93	218.00	10.32	10.32	0.282200
C94	218.00	10.32	10.32	0.282200
C95	218.00	10.32	10.32	0.282200
C96	218.00	10.32	10.32	0.282200
C97	218.00	10.32	10.32	0.282200
C98	218.00	10.32	10.32	0.282200
C99	218.00	10.32	10.32	0.282200
C100	218.00	10.32	10.32	0.282200

Course	Bearing	Distance
1	S 89°29'00" W	10.33
2	S 89°29'00" W	10.33
3	S 89°29'00" W	10.33
4	S 89°29'00" W	10.33
5	S 89°29'00" W	10.33
6	S 89°29'00" W	10.33
7	S 89°29'00" W	10.33
8	S 89°29'00" W	10.33
9	S 89°29'00" W	10.33
10	S 89°29'00" W	10.33
11	S 89°29'00" W	10.33
12	S 89°29'00" W	10.33
13	S 89°29'00" W	10.33
14	S 89°29'00" W	10.33
15	S 89°29'00" W	10.33
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17	S 89°29'00" W	10.33
18	S 89°29'00" W	10.33
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97	S 89°29'00" W	10.33
98	S 89°29'00" W	10.33
99	S 89°29'00" W	10.33
100	S 89°29'00" W	10.33



- LEGEND:**
- PROPERTY LINE
  - BOUNDARY LINE
  - BACK OF CURB
  - SEWER LINE
  - UNDERGROUND POWER
  - UNDERGROUND CATH
  - WATERLINE
  - DATA LINE
  - COMPUTED POINT
  - POWER POLE
  - WATER METER
  - SEWER MANHOLE
  - TRANSFORMER
  - SEWER TAP
  - SEWER LAMP POST
  - SEWER CONNECTION COMMUNICATIONS CO
  - STORM DRAINAGE EASEMENT

- NOTES:**
- THIS PROPERTY IS NOT LOCATED IN A DESIGNATED FLOOD ZONE.
  - AREA IS DETERMINED BY COORDINATE COMPUTATION.
  - OF SURVEY'S COMPLETED FROM AN ADJACENT PLANNED OR SET.
  - UNDERGROUND UTILITIES NOT LOCATED AS OF THIS DATE.
  - NO VISIBLE GRASS MONUMENTS WITHIN ZONE OF SURVEY PROPERTY.
  - ADJACENT AREAS ARE EXISTING WILDS DRAINAGE NOTES.
  - PROPERTY IS CURRENTLY ZONED RPA.
  - SE DRAINAGE SPACES LINES FROM MS 49-978.
  - PLANNED 10' WIDE
  - PLANNED 10' WIDE
  - LAMP POST IN THE REAR TO BE MOVED OFF OF PROPERTY BY THE TOWN OF DAVIDSON.
  - THE TOWN OF DAVIDSON TO PROVIDE WATER & SEWER CONNECTIONS TO ALL LOTS.

SITE PLAN  
OF  
"FUTURE DUNCAN SITE,  
MAP 3 OF BAILEY SPRINGS"  
FOR  
**JCB URBAN**  
PROPERTY OF  
**TOWN OF DAVIDSON**  
12128 BRADFORD PARK DRIVE  
DEED BOOK 24357-283, PHN 007-111-97  
MAP BOOK 49, PAGE 979  
DEWEES TOWNSHIP, MECKLENBURG COUNTY  
NORTH CAROLINA  
OCTOBER 28, 2016  
FILE NAME: JCB-144-BAL-1-000000-000-000  
GRAPHIC SCALE - FEET  
1" = 30'

Exhibit A