



COUNTY OF LINCOLN, NORTH CAROLINA

302 NORTH ACADEMY STREET, SUITE A, LINCOLNTON, NORTH CAROLINA 28092

PLANNING AND INSPECTIONS DEPARTMENT
704-736-8440 OFFICE
704-732-9010 FAX

To: Alex Patton, Board of Commissioners Chairman

George Wood, County Manager

Jeff Frushtick, Planning Board Chairman

From: Randy Hawkins, Zoning Administrator

Date: February 23, 2011

Re: PD #2011-1

Beacon Management Corp., applicant

Parcel ID# 83152

The following information is for use by the Lincoln County Board of Commissioners and the Planning Board at their joint meeting/public hearing on March 7, 2011.

Request

The applicant is requesting the rezoning of 10.1 acres from B-N (Neighborhood Business), B-G (General Business) and R-SF (Residential Single-Family) to PD-R (Planned Development Residential) to permit the development of a 74-unit apartment complex for ages 55 and older in accordance with a master plan. PD-R is a zoning option provided under the Lincoln County Unified Development Ordinance to encourage a mix of housing types, allowing a density bonus in return for the provision of a higher quality development.

Site Area & Description

The property is a portion of a 65-acre parcel. It is located on the east side of Hwy. 16 Business about 1,000 feet north of Hagers Hollow Drive. It is adjoined by property zoned B-N and B-G. Lands uses in this area are a mixture of commercial and residential. Another portion of this parcel was rezoned to Conditional Use Planned Residential in 2006 and approved for 120 condominiums units. Public water and sewer are available at the location.

Waiver Requested From General Standards

The General Development Standards of the Lincoln County Unified Development Ordinance apply to planned developments unless specifically waived by the Board of Commissioners. In this case, the applicant is requesting a waiver from the minimum parking requirements of Section 3.6.3.

For apartments, Section 3.6.3 requires that parking be provided at the rate of 1.5 spaces per one-bedroom unit and 1.75 per spaces per two-bedroom unit. In this case, the general standards require a total of 116 spaces.

The proposed plan calls for a total of 87 spaces. According to Beacon Management, this is a sufficient number based on the company's experience in managing other senior housing properties.



Lincoln County Building & Land Development **Zoning Application Background and Staff Comments**

Application #
<u>PD #2011-1</u>

IDENTIFYING DATA

Parcel ID: 83152 (a 10.1-acre portion)

Location of property: east side of N.C. 16 Business about 1,000 feet north of Hagers Hollow Drive

Name of current property owners: TGD I, LLC, and McBee Apartments

Address of current property owners: 338 N. Elm St., Suite 320, Greensboro, N.C.

Date of application: received January 21, 2011

ZONING INFORMATION

Current zoning: B-N, B-G and R-SF

Current use: undeveloped land

Property size: 10.1 acres

Proposed zoning: PD-R (Planned Development Residential)

Proposed uses: 74-unit apartment complex for ages 55 and older

Description of request: rezoning to Planned Development district

Comments: Development in a PD district is subject to an approved master plan. In this case, the proposed master plan includes a project report, a site plan and building elevations.

LAND USE PLAN CLASSIFICATION

The Lincoln County Land Use Plan classifies this property as part of the NC 16 Corridor and calls for a redevelopment plan that promotes the further mixing of land uses but in a more orderly and planned fashion. The NC Corridor Vision Plan calls for concentrating commercial development in nodes.

ENVIRONMENTAL

Soil type(s): Pacolet sandy loam (PaC), 8-15% slopes, moderately suited for building site development; and Cecil sandy clay loam (CeB2), 2-8% slopes, well suited for building site development

Water supply watershed classification: WS-IV Protected Area. The applicant is proposing to utilize the low-density option, which limits impervious coverage to no more than 36 percent of the development site.

HYDROLOGICAL CONDITIONS

Flood panel number: 4604

Zone: X – no flood hazard

Is any portion of the property located in a floodplain or floodway: no

TRANSPORTATION

Is a traffic impact analysis required for this request: no

What is the average daily traffic count at this location? 17,000 according to 2008 figures

What improvements are proposed? A right-turn lane on Hwy. 16 at the proposed new road

ADDITIONAL INFORMATION

What are the surrounding land uses and zoning?

North: zoned business, residential uses.

East: zoned business, undeveloped land.

South: zoned business, undeveloped land.

West: zoned business, commercial uses.

List of potential uses under existing zoning: stores, restaurants, offices, etc.

List of potential uses under proposed zoning: 74-unit apartment complex for ages 55 and older

RECREATION AND OPEN SPACE

Minimum requirement under Unified Development Ordinance: 12.5%

Proposed: estimated 37%

BUFFER

Buffer required by the Unified Development Ordinance: Class C buffer along all project boundaries

SIGNAGE

Number, type and size of freestanding signs proposed: One monument sign on Hwy. 16

STAFF'S RECOMMENDATION AND COMMENTS

Staff recommends approval of the rezoning request and approval of the requested waiver from the general standards for parking.

Development of the property under the current business zoning is not consistent with the NC 16 Corridor Vision Plan.

Strategy 1.3.1 of the Lincoln County Land Use Plan calls for locating denser development in areas where it will be supported by existing public utility and transportation infrastructure with adequate capacity.

Objective 9.1 of the Land Use Plan calls for ensuring that viable housing choices exist in the county for persons from a broad range of income groups.

The proposed development is compatible with the condominium development that has been approved for another portion of this parcel.



Planned Development Rezoning Application

Lincoln County Planning and Inspections Department
Zoning Administrator
302 N. Academy St., Lincolnton, NC 28092
Phone: (704)736-8440 Fax: (704)732-9010

PART I

Applicant Name: Beacon Management Corporation

Applicant Address: 408 Battleground Ave. Greensboro, NC 27401

Applicant Phone: Number 336-282-6000

Property Owner Name: TGD 1, LLC / McBee Apartments, LP

Property Owner Address: 338 N. Elm St. Suite 320 Greensboro, NC

Property Owner Phone Number: 336-275-1832

PART II

Property Location: North NC Hwy 16

Property ID: (10 digits) 4604-45-8856 Property size: 10.08

Parcel # (5 digits) 83152 Deed Book(s) 1828 Page(s) 334

PART III

Existing Zoning District B-N/ B-G Proposed Zoning District PD-R

Briefly describe how the property is being used and any existing structures:

Currently Property is in Forestry Program. Vacant Land

Briefly described the proposed planned development:

Westport Terrace will be comprised of 74 units to include 56 one-bedroom and 18 two bedroom units in a craftsman style architecture single story residential community for seniors.

***SEE PLANNING DEPT. FOR PLANNED DEVELOPMENT FEES.**

I hereby certify that all knowledge of the information provided for this application and attachments is true and correct to the best of my knowledge.


Applicant's Signature

1/20/11

Date

PROJECT REPORT

WESTPORT TERRACE

A SENIOR LIVING COMMUNITY

I. Introduction

Beacon Management Corporation is proposing the development of 10.08 acres of vacant land which is in close proximity to the Westport Golf Club. This development will feature a 74 unit Craftsman style architecture residential community for seniors. The new development will be age restricted to persons 55 and older and calls for the construction of 56 one-bedroom and 18 two-bedroom residences in single story buildings. There will also be a separate community building that will house the onsite manager's office, communal laundry, resident computer area as well as an educational/recreational, activity center. Each dwelling unit has been carefully sized and planned to securely and comfortably house our senior tenants. Beyond the buildings' architectural beauty, construction will be of high quality and undertaken utilizing materials, techniques and equipment to achieve an extremely high degree of energy efficiency for residents. Westport Terrace's design and construction will meet and/or exceed the Department of Energy's Energy Star program.

The apartments in the proposed community will target senior populations having admission incomes below 60% of the area median income. More than fifty percent of the property's dwellings will actually have rental levels that are able to serve household with incomes below 40% of the area median income. To assure the broadest range of mixed incomes, private and public rental subsidies will be accepted and encouraged.

A preliminary application to the North Carolina Housing Finance Agency was filed on January 14th, 2011. Construction and permanent financing for the venture has been pledged. All financing has been preliminarily committed with the exception of the Low Income Housing Tax Credits which, as stated previously, were applied for in early January.

We look forward to working with Lincoln County in the initial rezoning of the property as well as other areas as the process moves forward. Should you need any additional information, kindly contact us so that we may respond in a timely manner

II. Property Ownership

The subject property is composed of 11.56 acres with 10.08 of buildable acres. The Property ID is 4604-45-8856 with Parcel number 83152 and referenced as Deed Book 1828 and Page 334 as listed on the Lincoln County GIS System. Ownership of the parcel will be by Beacon Management Corporation and this parcel is in Lincoln County and is currently zoned B-G/B-N. Beacon Management Corporation is requesting a re-zoning to Planned Development-Residential (PD-R)

III. Infrastructure

The attached preliminary site plan shows a conceptual street and lot layout based upon the information available. The attached preliminary site plan shows the proposed layout of the community which will consist of 74 apartments grouped in 4-unit and 6-unit buildings.

The proposed public road will meet NCDOT standards, as the intent will be to turn this road over to the state as a public road. The driveways to be constructed within

the development will meet all requirements for emergency access, with the intent that these driveways will remain private and be maintained by the owner/manager.

The community will be served by public water and public sewer. Beacon Management Corporation will work with the Public Works Department of Lincoln County to comply with the county's specifications for these utilities.

Telephone service, natural gas, cable and electricity will be provided by the local utility companies. All utilities will be dedicated to the appropriate owner. Additionally, all utilities will be underground.

The traffic information generated by the North Carolina Department of Transportation indicates that the elderly complex has a very low peak hour number, not to require turn lanes. The 2009 ADT for that section of NC 16 was 16,000 vehicles per day. We expect that number to decrease once the new NC 16 is fully functional.

IV. Development

This development will be complementary to the existing neighborhoods of the surrounding areas and will offer current and new residents improved housing choices, including walking options with the addition of sidewalks and trails.

Beacon Management Corporation intends to develop this neighborhood in accordance with the plans approved by the Lincoln County Board of Commissioners and in conformance with the regulations set forth in the Lincoln County Unified Development Ordinance.

V. Team Members

Barret Hagen, PE, the Civil Engineer on this project is Professional Civil Engineer. His background lends itself to responsible development and engineering practices, which are in the best interest of the development, the adjoining residents and the community at large.

Efird, Sutphin, Pearce is the architectural firm designing this development and has a long, successful track record inspection and compliance with land and construction ordinances.

KMW Builders will be the general contractor building the Westport Terrace development and has an extensive history of constructing communities such as these throughout North Carolina.

Lastly, Beacon Management Corporation will be the developer and has over a 35 yr. career developing affordable communities for seniors. Our organization is led by George E. Carr III who has a 40 year career in developing and/or managing both family and senior properties.

Community Involvement Meeting report

PD #2011-1

Beacon Management Corp., applicant

A community involvement meeting on this rezoning request was held on Feb. 24, 2011, at the Episcopal Church of St. Peter By-the-Lake. Patrick Theismann of Beacon Management and property owner Tom Daniel talked about the proposed development and answered questions. About 30 people attended the meeting.

Following is a summary of the comments, questions and answers.

Patrick Theismann: The proposed development is affordable housing, provided through a tax credit (for investors) that allows lower rents. This is different from Section 8. The subsidy comes into the building stage. It's a federal allocation, Section 42. The apartments would be 700 or 900 square feet, and rent for \$500 to \$675 a month. The units would be Energy Star certified, with a high percentage of brick and quality materials. Landscaping, a walking trail and other amenities will be provided, including a clubhouse with a computer room, a kitchen and a meeting room. Beacon manages 29 similar properties containing 1,400 units.

The architectural is similar to One Cherry Way (another housing project for ages 55 and older that's being built on Unity Church Road).

Tom Daniel: Those are for sale. These are for rent.

I'm concerned about rental status, a transient community.

Patrick Theismann: We have residents who have been with us for 20 or 30 years. We average 95-96 percent occupancy. It is not transient. Rarely do we have turnover. Typically, it's only due to death or their family decides they're not able to live independently.

Why was the name "Westport" tacked onto it? Westport is a community that is 40-plus years old. It had tried to preserve its identity. It's a little disconcerting to have a group of people come into here without the ties and to take the name without any consultation. That name is going to cause problems. When you come up Hwy. 16, there are signs that say Westport. We are a designated community. It does not link with the rest of the community.

My issue is with the other part of the name – the "Terrace." A retirement community a few miles north on Hwy. 16 is named The Terraces. I think there would be tremendous confusion.

Patrick Theismann: We'll absolutely look into it. The name is not set in stone.

How will this be kept up?

Patrick Theismann: We're not only the developer, we're the management entity.

How will tenants be screened?

Patrick Theismann: We run credit and criminal checks on all of our tenants. It's a rigorous vetting process. We get previous landlords' references. There's a minimum of a one-year lease. We have a high percentage of female residents. Many are retired government employees with a pension and Social Security.

Tom Daniel: They're not looking for a low-income housing project.

What about traffic?

Patrick Theismann: It will have minimal impact. About a half to two-thirds of residents drive.

Tom Daniel: It's not peak hour traffic.

What impact will this have on East Lincoln sewer?

Tom Daniel: It will have a positive impact. There's capacity. The new plant is up and running.

Will there be boat or RV storage?

Patrick Theismann: No

Why this location?

Tom Daniel: For the visibility and access, the frontage on Hwy. 16. We had eyed this for commercial, but that's not viable now.

I think if you want to get this approved, you need to take a long, hard look at putting in a turn lane northbound.



LINCOLN COUNTY PLANNING & INSPECTIONS DEPARTMENT

302 NORTH ACADEMY STREET, SUITE A, LINCOLNTON, NORTH CAROLINA 28092
704-736-8440 OFFICE 704-736-8434 INSPECTION REQUEST LINE 704-732-9010 FAX

Zoning Amendment

Statement of Consistency and Reasonableness

Adopted by the Lincoln County Planning Board on _____

Case No. **PD #2011-1**

Applicant **Beacon Management Corp.**

Parcel ID# **83152 (10.1 acre portion)**

Location **east side of Hwy. 16 about 1,000 feet north of Hagers Hollow Drive**

Proposed amendment **Rezone from B-N, B-G and R-SF to PD-R to permit a 74-unit apartment complex for ages 55 and older**

This proposed amendment is

- consistent
- inconsistent

with the Lincoln County Comprehensive Land Use Plan and other adopted plans in that:

This proposed amendment is

- reasonable and in the public interest
- not reasonable and not in the public interest

in that:



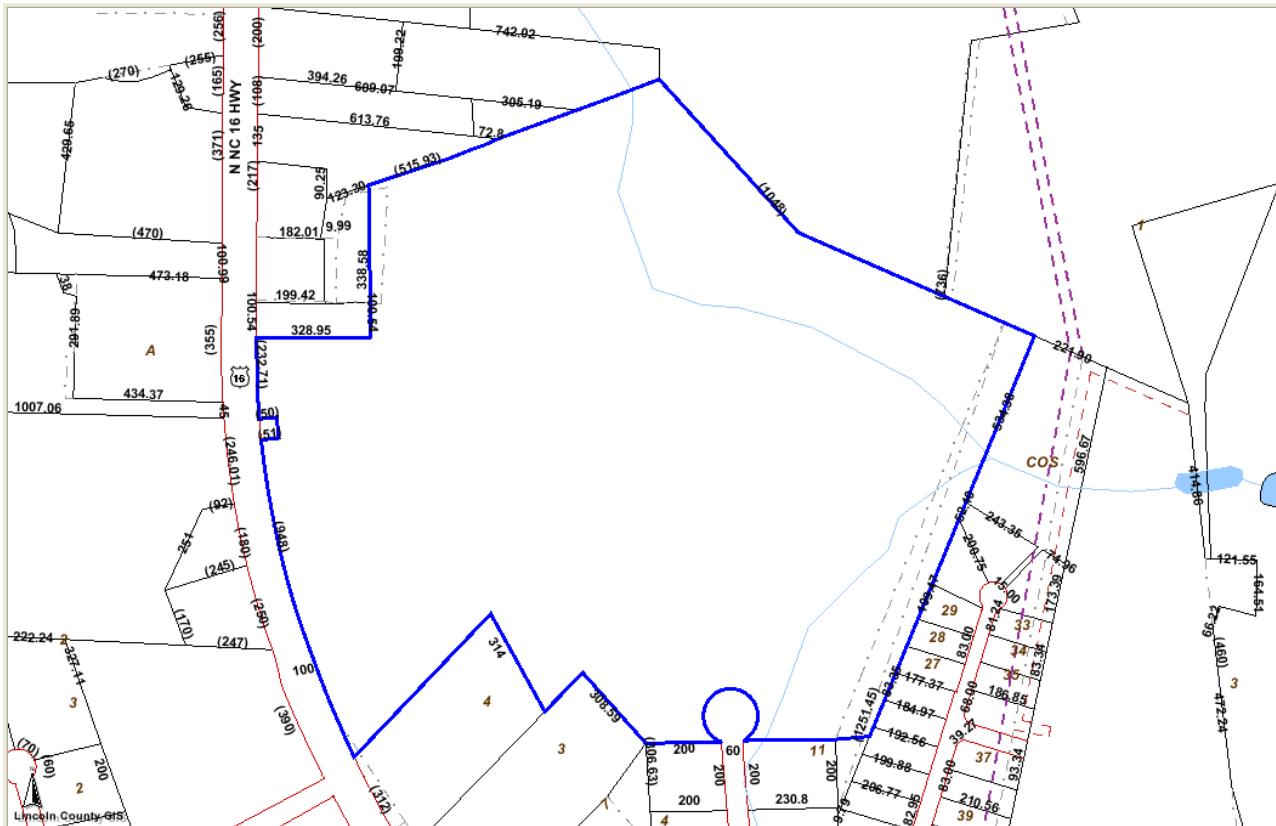
Lincoln County, NC

Office of the Tax Administrator, GIS Mapping Division

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Date: 2/16/2011 Scale: 1 Inch = 500 Feet



PHOTOS



Photo Not Available

PARCEL INFORMATION FOR 4604-45-8856

Parcel ID	60266	Owner	TGD I LLC MCBEE APARTMENTS PO BOX 9007 GREENSBORO NC 27429
Map	4604-10	Mailing Address	
Account	0195022	Recorded	6/28/2006
Deed	1828-334	Total Value	\$1,230,632
Land Value	\$1,230,632	Sale Price	\$1,958,000
----- All values are for tax year 2011. -----			
Description	VACANT SEE PARCEL #83152	Deed Acres	66.89
Address	N NC 16 HWY	Tax Acres	44.23
Township	CATAWBA SPRINGS	Tax/Fire District	DENVER
Improvement			
Parcel ID	83152	Owner	No Improvements
Map	4604-10	Mailing Address	TGD I LLC MCBEE APARTMENTS PO BOX 9007 GREENSBORO NC 27429
Account	0195022	Recorded	6/28/2006
Deed	1828-334	Total Value	\$1,180,386
Land Value	\$1,180,386	Sale Price	\$1,958,000
----- All values are for tax year 2011. -----			
Description	VACANT SEE PARCEL#60266	Deed Acres	66.89
Address	N NC 16 HWY	Tax Acres	20.85
Township	CATAWBA SPRINGS	Tax/Fire District	DENVER / EL SEWER
Improvement			
Zoning District	Calculated Acres	Voting Precinct	Calculated Acres
P-R CU	27.57	WESTPORT (WP32)	65.1
B-G	22.03		
B-N	15.31		
R-SF	0.19		
Watershed Class			
Not in a watershed	1.02	Sewer District	
WS-IVP	64.07	Not in the sewer district	44.24
2000 Census County			
37109		In the sewer District	20.86
37109		Tract	
Flood	Zone Description	Block	
X	NO FLOOD HAZARD	071100	64.53
		071100	0.57
		Panel	
		4604	65.1

**Lincoln County, NC**

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Date: 1/24/2011 Scale: 1 Inch = 400 Feet

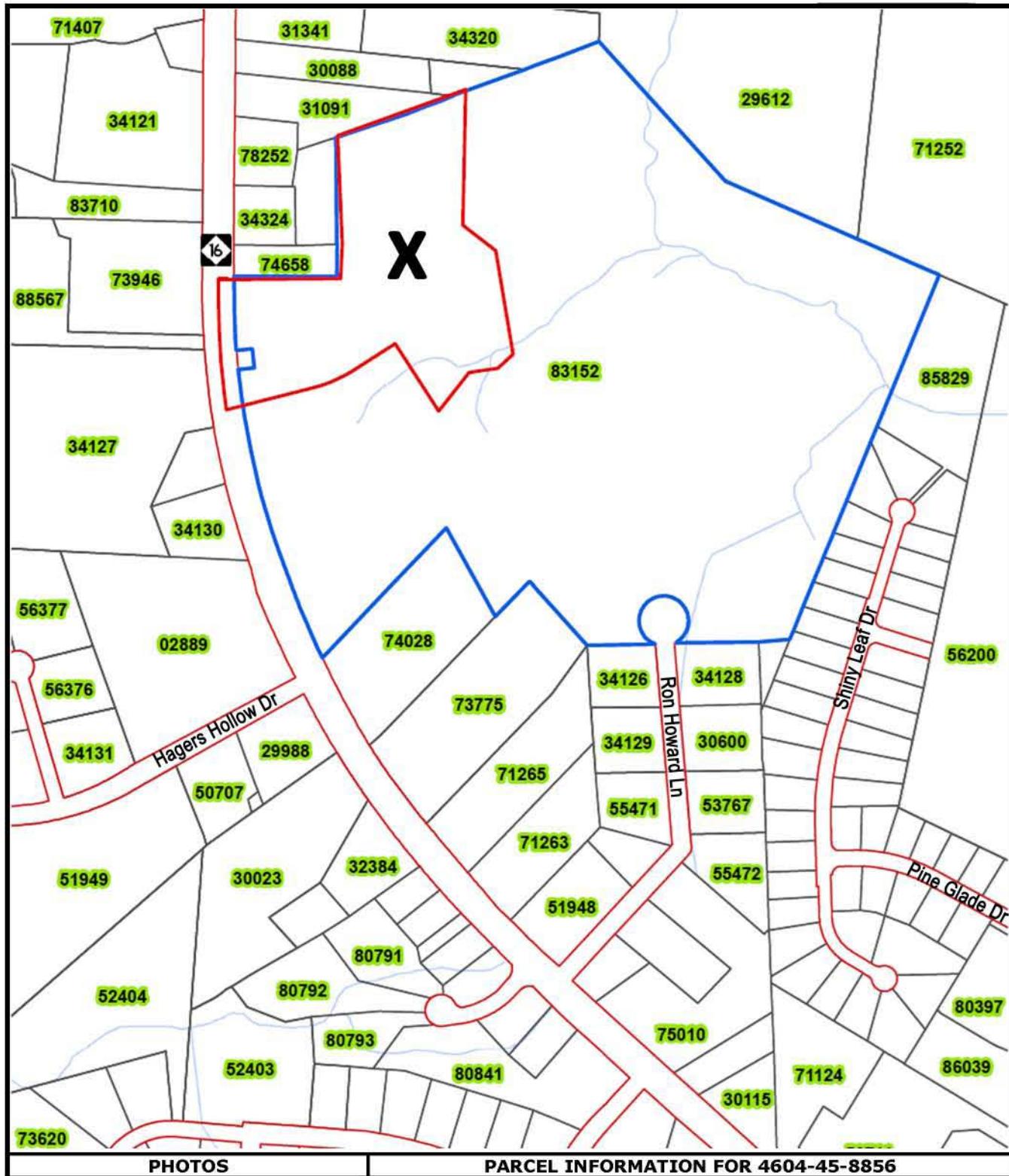
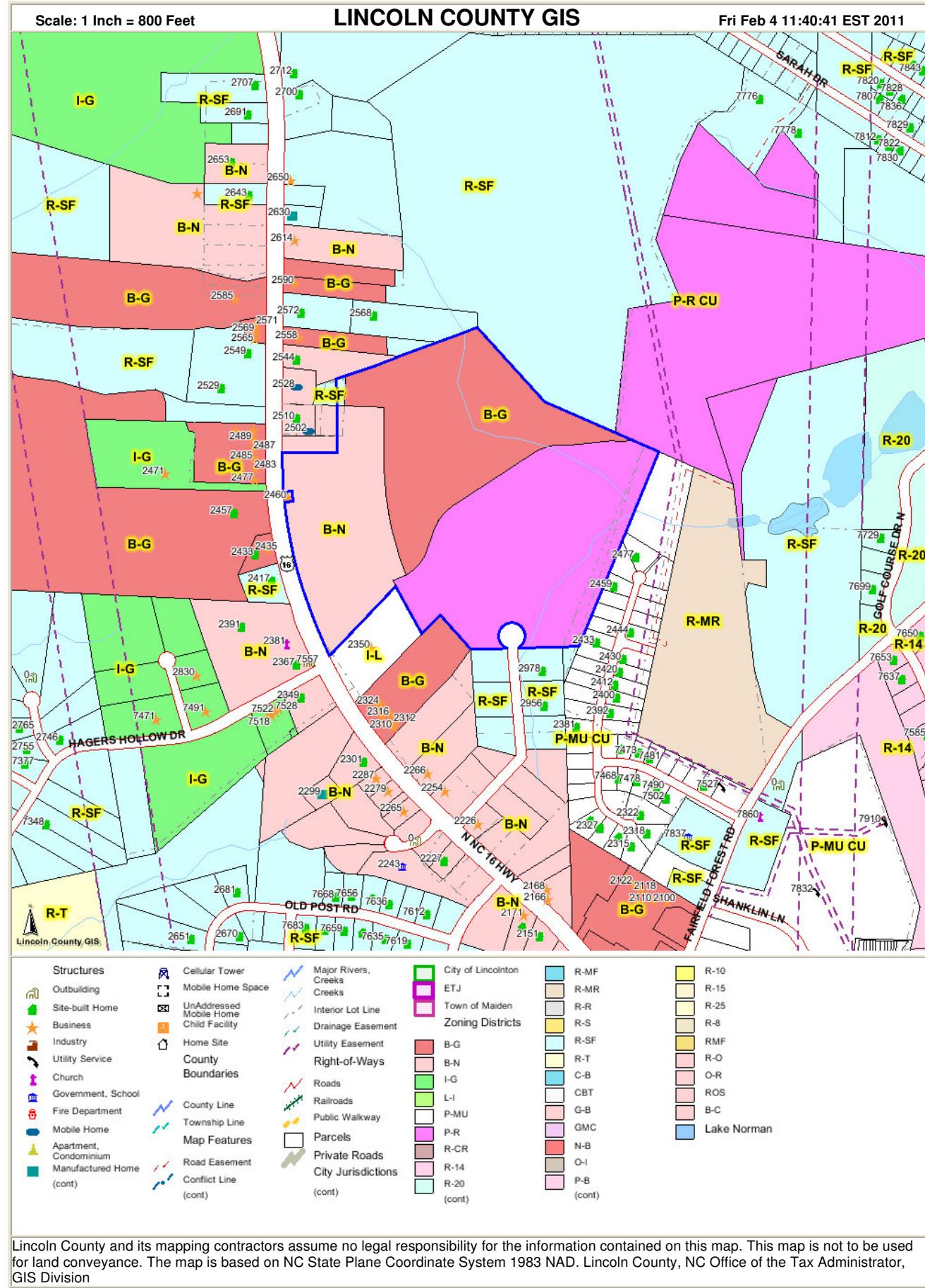
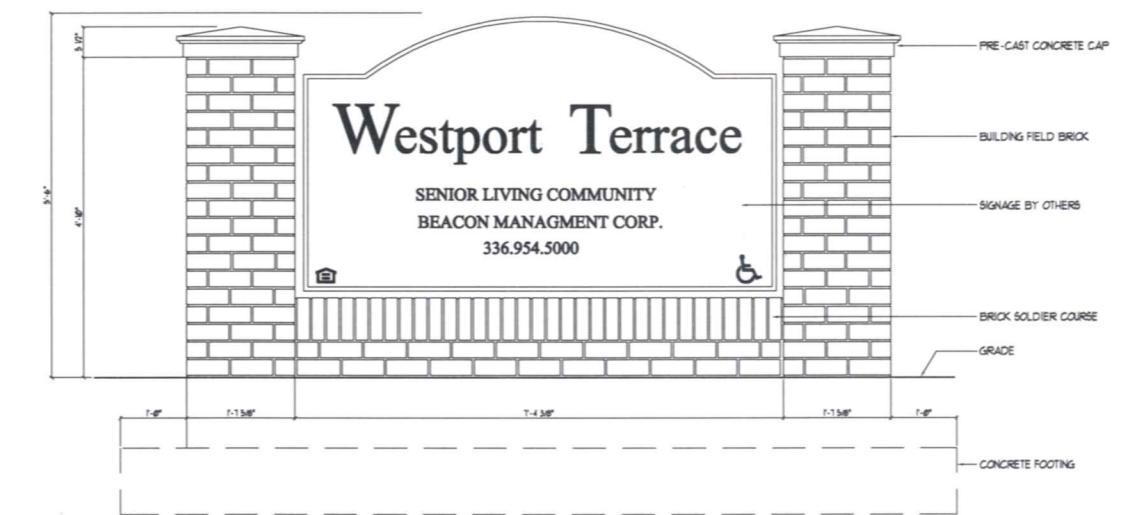
**X=Subject Property**



Photo Not Available

Parcel ID	83152	Owner	TGD I LLC MCBEE APARTMENTS PO BOX 9007 GREENSBORO NC 27429		
Map	4604-10	Mailing Address	6/28/2006		
Account	0195022	Recorded	Sale Price \$1,958,000		
Deed	1828-334	Total Value	Previous Parcel 34127		
Land Value	\$1,269,614	----- All values are for tax year 2010. -----			
Description	VACANT SEE PARCEL#60266				
Address	N NC 16 HWY				
Township	CATAWBA SPRINGS				
Improvement	No Improvements				
Parcel ID	60266	Owner	TGD I LLC MCBEE APARTMENTS PO BOX 9007 GREENSBORO NC 27429		
Map	4604-10	Mailing Address	6/28/2006		
Account	0195022	Recorded	Sale Price \$1,958,000		
Deed	1828-334	Total Value	Previous Parcel		
Land Value	\$1,146,299	----- All values are for tax year 2010. -----			
Description	VACANT SEE PARCEL #83152				
Address	N NC 16 HWY				
Township	CATAWBA SPRINGS				
Improvement	No Improvements				
Zoning District	Calculated Acres	Voting Precinct	Calculated Acres		
P-R CU	27.57	WESTPORT (WP32)	65.1		
B-G	22.03				
B-N	15.31				
R-SF	0.19				
Watershed Class		Sewer District			
Not in a watershed	1.02	Not in the sewer district	44.24		
WS-IVP	64.07	In the sewer District	20.86		
2000 Census County		Tract	Block		
37109		071100	2000		
37109		071100	2003		
Flood	Zone Description	Panel			
X	NO FLOOD HAZARD	4604	65.1		





Westport Terrace

Lake Norman, North Carolina



EXTERIOR ELEVATIONS 4- One Bedroom and 2- Two Bedroom Units

Westport Terrace

Denver, North Carolina



LEFT SIDE ELEVATION



FRONT ELEVATION



REAR ELEVATION



RIGHT SIDE ELEVATION

EXTERIOR ELEVATIONS - BUILDING TYPE A (4 ONE BEDROOM UNITS)

JANUARY 7, 2011

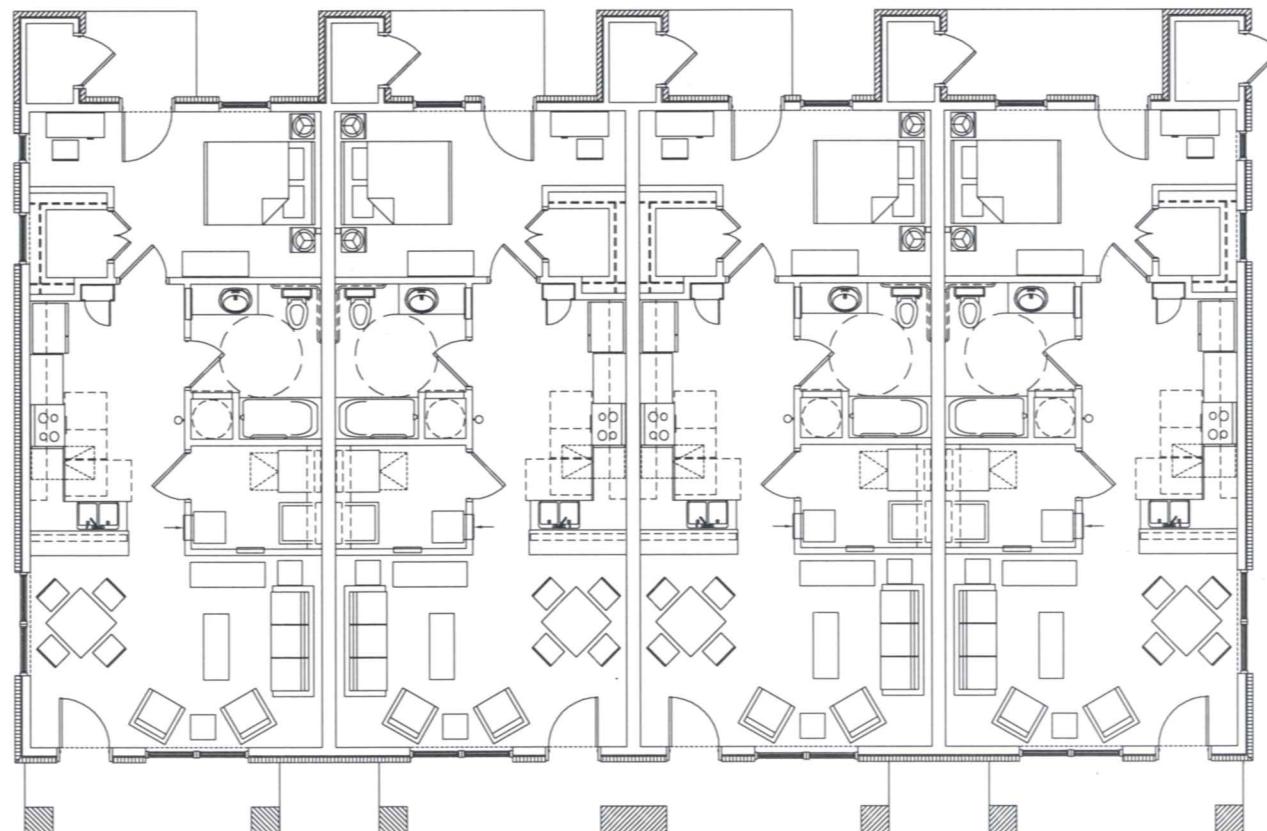
Westport Terrace

Denver, North Carolina



Unit Amenities

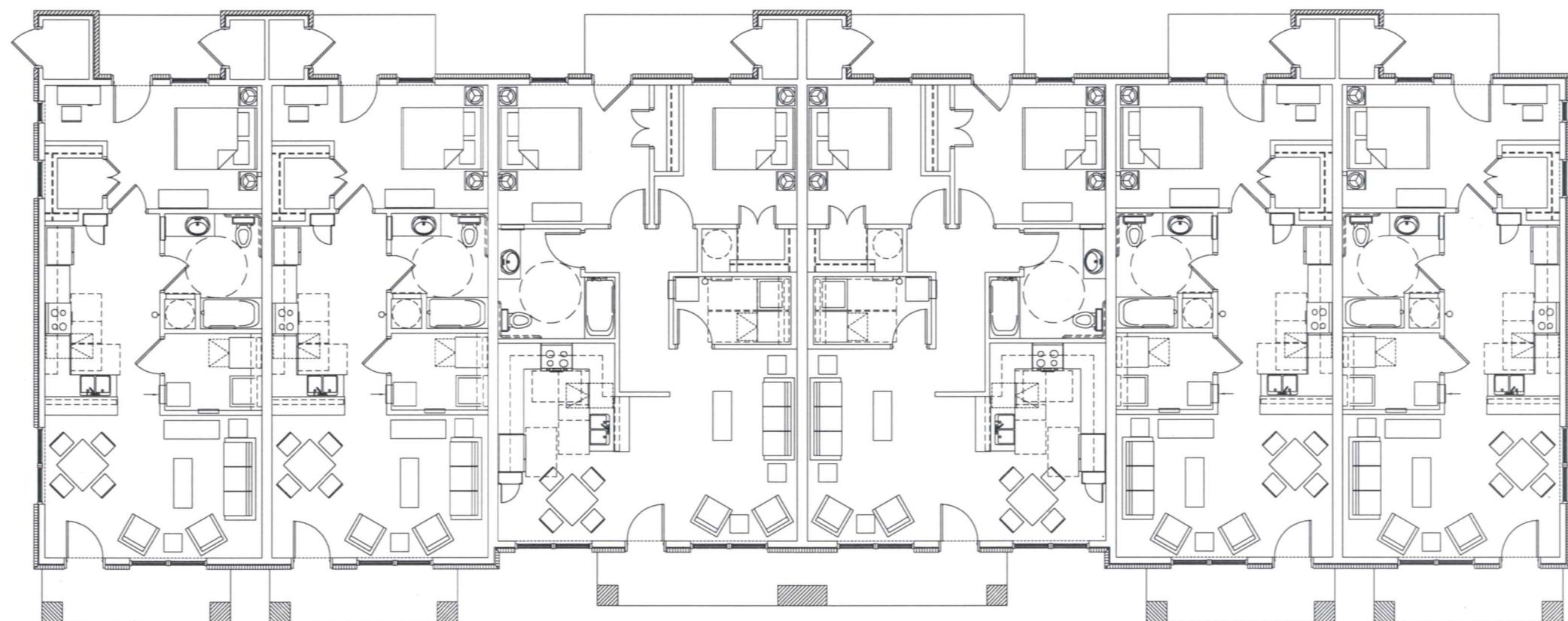
- 1 Bedroom Unit
(Net 675 sq ft)
(Gross 765 sq ft)
- 2 Bedroom Unit
(Net 900 sq ft)
(Gross 1,003 sq ft)
- Storage Area
- Covered Porch
- Energy Star Certified



FLOOR PLAN- BUILDING TYPE B (4 ONE BEDROOM UNITS)

Westport Terrace

Denver, North Carolina





FRONT ELEVATION



LEFT SIDE ELEVATION



REAR ELEVATION



RIGHT SIDE ELEVATION

Westport Terrace

Denver, North Carolina

EXTERIOR ELEVATIONS - CLUBHOUSE