

## Herndon Farms

*An Active-Adult Compact Community*

### **Introduction to the Development – Executive Summary**

Herndon Farms is a uniquely conceived, multi-use, active-adult community on 97.86 acres located on Highway 15-501 between Chapel Hill and Pittsboro. The Development will provide residents the opportunity to comfortably age-in-community in a vibrant, amenity-rich environment. This active-adult community is designed to meet the specific needs of active seniors but also affords comfortable living for all later-in-life stages with maximum independence.

The project incorporates many of Chatham County’s expressed goals of providing for the older segment of the population, as specified in Chatham County’s adopted Comprehensive Plan (Plan Chatham), and reflected in the Chatham County Council on Aging Vision statement:

*“Our vision is a Chatham County that offers older adults ..., a safe, affordable, accessible, and inclusive community that promotes wellness, presents, and respects choices, values diversity, recognizes and uses people’s strengths, and supports individuals aging in community with dignity.”*

While already a growing demographic Triangle-wide, “Empty Nesters” ready to downsize have particularly targeted Chatham County for its proximity to quality healthcare and accessibility to cultural and recreational activities in the Chatham County area.

The look and feel of Herndon Farms will be designed to create a unique and livable community. It will combine mindful design, environmentally friendly components, and a small farming operation. These features will come together to positively impact the quality of life of all residents. The proposed farm honors the agrarian history of Chatham County and the current and former residents of the property. There will be community gardens dedicated to ornamental plants, flowering fragrant plants, and native North Carolina plants. A community dog park, a koi pond, and other water features that use reclaimed water are also planned as parts of the landscape. Herndon Farm’s amenities will facilitate healthy engagement for the residents and visitors to the community and provide opportunities to connect with one another.

**General Application Requirements**Conditional Zoning Application – **Exhibit A****Property Owners**

| <b>Parcel(s) #</b>               | <b>Property Owner Name</b>  |
|----------------------------------|-----------------------------|
| <b>93852</b>                     | Herndon Farms One LLC       |
| <b>2752, 18750, 18897, 18896</b> | James Bunn Riggsbee         |
| <b>18909</b>                     | M Travis & Margaret T Blake |

**Adjacent Owners – Exhibit A.1.1.a**

| <b>Parcel(s) #</b> | <b>Adjacent Owner Name</b>      |
|--------------------|---------------------------------|
| <b>1593</b>        | John and Marion Haywood         |
| <b>2722</b>        | Aqua North Carolina Inc.        |
| <b>2749</b>        | Jaon Thompson                   |
| <b>2750</b>        | Alfred and Norma Richardson     |
| <b>2751</b>        | Michael Bishop                  |
| <b>2753</b>        | Crown Estate Holding LLC        |
| <b>2821</b>        | William and Brenda Griffin      |
| <b>2824</b>        | William and Brenda Griffin      |
| <b>2828</b>        | William and Brenda Griffin      |
| <b>18637</b>       | Sandy Pond Enterprises LLC      |
| <b>18869</b>       | Hoyt Collins                    |
| <b>18908</b>       | Keith Allen and Ruth Williams   |
| <b>63060</b>       | Ramon and Cecilia Sotelo        |
| <b>63574</b>       | James L and Elizabeth M Griffin |
| <b>66568</b>       | Donna M. Bass Life Estate       |
| <b>67287</b>       | Donna M. Bass Life Estate       |

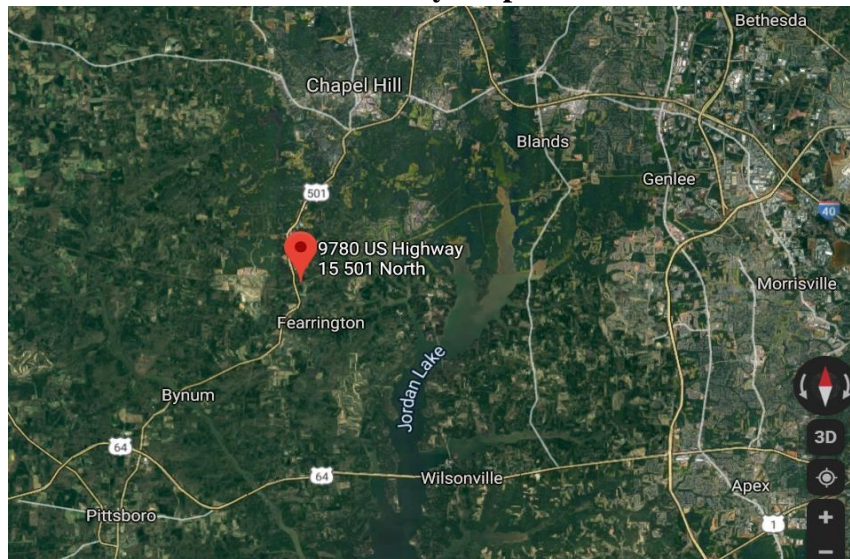
|              |   |
|--------------|---|
| <b>70278</b> | Andrew and Brigitte Haight                                    |
| <b>70746</b> | Mustafa Abdelkarim and Tahani Kheir Farah                     |
| <b>70762</b> | Timothy Brian Perry and Elizabeth Henderson Perry             |
| <b>72944</b> | Briar Chapel Community Association Inc                        |
| <b>79956</b> | Kath and Edmund Pettiss Trustees of Kath A. Pettiss Liv Trust |
| <b>85632</b> | NNP Briar Chapel LLC & C/O Newland Communities                |
| <b>87621</b> | Briar Chapel Community Associates                             |
| <b>90768</b> | Veranda BC Investments LLC                                    |
| <b>90769</b> | Fadz Properties LLC   |
| <b>90770</b> | NNP Briar Chapel LLC & C/O Newland Communities                |

## **Property Information**

### ***Property Location and Description***

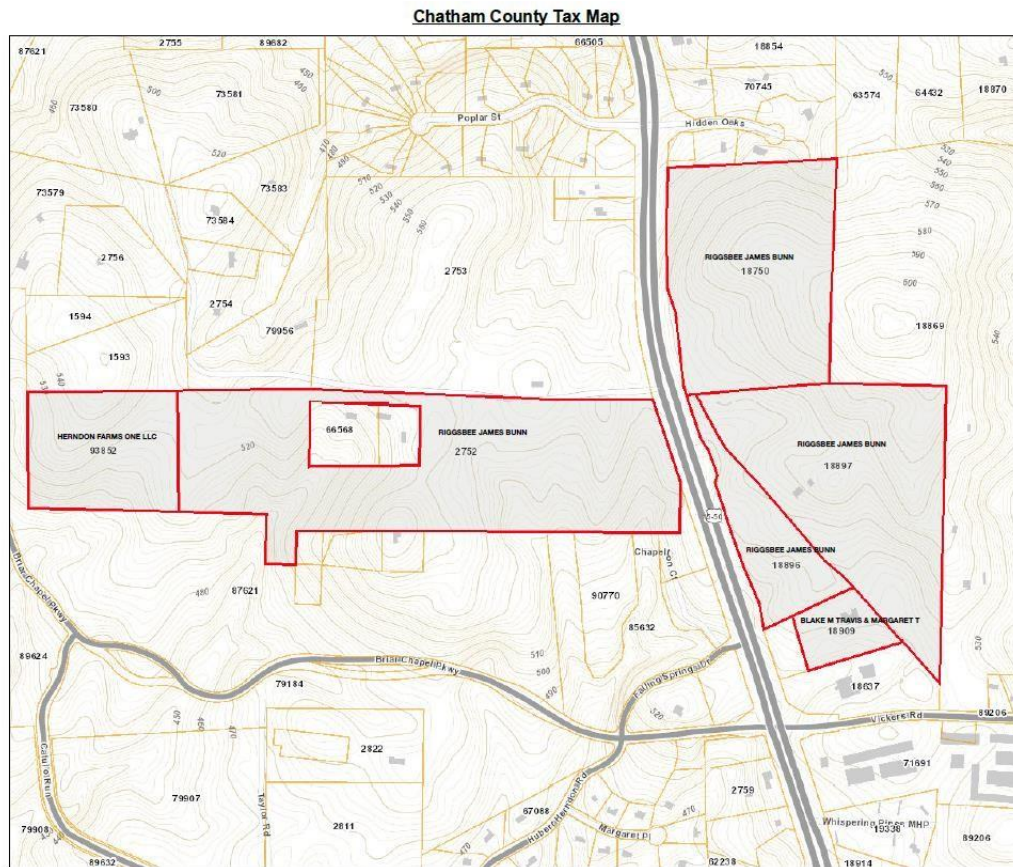
The proposed Herndon Farms project is located approximately 10 miles north of the center of Pittsboro and 7.5 miles south of the center Chapel Hill.

#### **Vicinity Map**



The project area is split by 15-501 and sits to the north of both Vickers Road and the Briar Chapel Parkway. Approximately 56 acres of the project are located on the east side of 15-501 and north of Vickers Road, with about 42 acres located to the west of 15-501 and north of the Briar Chapel Parkway. The site encompasses 5 parcels. There are 2 residences and associated buildings, both located on the east side parcels.

## Parcel Map



### Current Zoning, Use, and Prominent Features

All parcels making up the project site are currently zoned R-1. Current uses are residential and tree farming. The property does not contain any identified wildlife areas. A Duke Power easement runs east to west across the property, bisecting the east side and crossing the southern portion of the west side. Existing Conditions are displayed in **Exhibit B.1**.

### Description of Use

Herndon Farms is a proposed active-adult community for individuals aged 55 and over on 97.86 acres in northern Chatham County, North Carolina. In keeping with the history of both the property and the county, the project includes a working farm as an

integral part of the community design. The farming operations are part of the overall goal to make the project reflective of the area in which it is located and serve as an amenity for residents. Although the rural landscape is impacted by the housing component, this impact is minimized by the area enhanced by the buffer and internal landscaping, farm, planned gardens, and unique water features designed for this development.

#### **Planned Maximum Number Residential Units**

- 47 Single Family Homes NE Section
- 16 Duplex Homes (8 Bldg.) NE Section
- 34 Detached Rowhomes (also referred to as “high-density single-family homes”) NE Section.
- 45 Single Family Homes SE Section
- 19 Townhomes SE Section

#### **161 Total Residential Units**

#### **Commercial Buildings**

- Congregant Care Facility
  - 120-140 Unit Congregant Care Facility
  - Independent Living
  - Senior Amenities
- Single Story Daycare 10,000 Square Feet
  - Alternate Use - Fitness or Traditional Office

#### **150,000 Square Feet of Commercial**

#### **Site Plan Discussion**

**Exhibit B.2** is the proposed site plan for Herndon Farms. **Exhibit B.3** is the detailed site plan for the east side where all the major grading and building will take place.

Most of the site is graded to a maximum of 5% grade. Grading the site in this way encourages walkability and accessibility for the senior residents, further encouraging community. A grade of 5% or lower is considered relatively flat and easily navigated by those with mobility issues or mobility impairments.



In addition to accessibility, the general 5% grade will also slow the movement of stormwater allowing the pervious surfaces to better absorb the water. The slowing of runoff has multiple benefits such as groundwater recharging, high nutrient removal, and high suspended solids removal.

A natural perimeter buffer of 50' will be maintained around the property on both the East and West sides. The Developer will augment and maintain these buffers as needed, using native plants to make a natural transition to neighboring properties. In addition, the Developer will use some of the current plants and trees on the site in the overall landscaping plan to augment the buffer area. Several specimen quality American hollies, maples and oak trees have already been identified and marked for this purpose.

The Duke Power easement that splits the east side parcels into north and south sections is being utilized for a recreation field, pasture, pervious parking, and wastewater spray irrigation. As the development is populated, there will be additional allowable uses of this open space such as specified in the Chatham County Compact Community Ordinance. The utility easement is not counted towards the project's open space.

The focus of the project is its urban village center. This area is comprised of the farm animals, barn, pastures, community event center and pavilion. The community event area with the covered pavilion will include space for outdoor events such as a community farm stand or farmers' market. There will be appropriate space for community-enriching events such as food truck rallies open to residents and visitors alike.

### **Motivation for 5 Findings**

The case for the Herndon Farms project has been organized according to the 5 findings required in the Conditional Use Permit. While these points are in a slightly different order than in the outline provided on the application, the Developer has taken great care to cross reference each section to ensure that the information is comprehensive across both documents. The Developer ordered the case for Herndon Farms as follows:

**Finding #1** – Is the project eligible for the zoning requested.

**Finding #2** – Is the project desirable for the public convenience or welfare.

**Finding #3** – Will the project impair the integrity or character of the surrounding or adjoining areas, and will not be detrimental to the health, safety, welfare, or environment of the community.

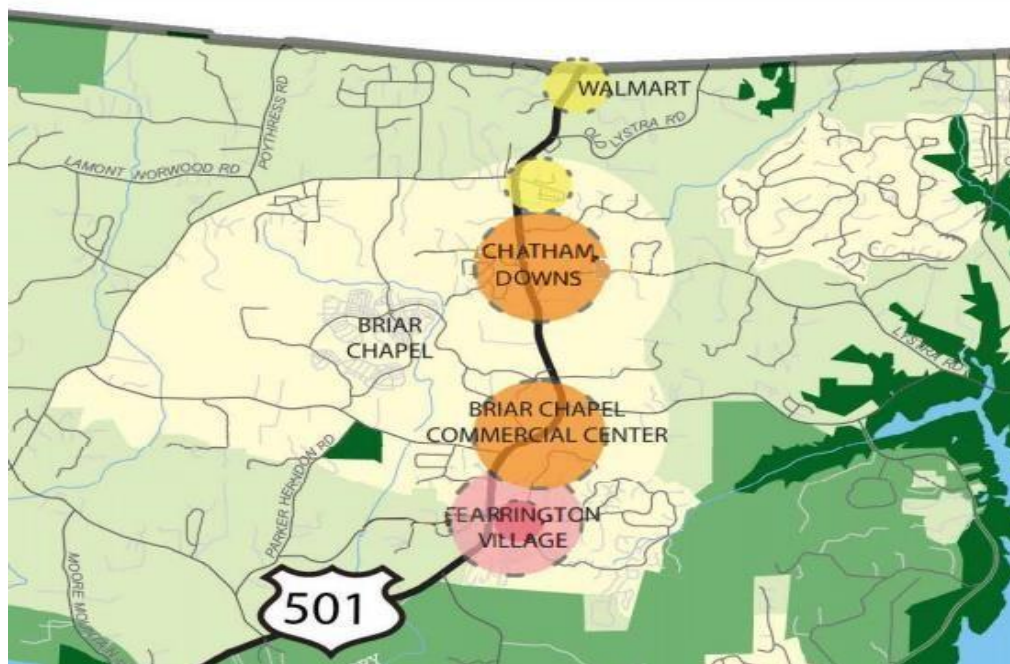
**Finding #4** – Is the project consistent with the objectives of the Land Use Plan.

**Finding #5** – Are there adequate utilities, access roads, storm drainage, recreation, open space, and other necessary facilities planned to be consistent with the County's plans, policies, and regulations.

**Finding #1 – Eligibility**

Chatham County has experienced substantial growth in the last thirty years, particularly along the 15-501 corridor. This growth has led Chatham to consider how to retain its character as an agrarian community while welcoming new residents and businesses. By concentrating growth along the 15-501 corridor, Chatham is better able to balance these two, sometimes competing, demands on the county.

Chatham County has identified an area along the 15-501 corridor as desirable for Compact Community development, as highlighted below:

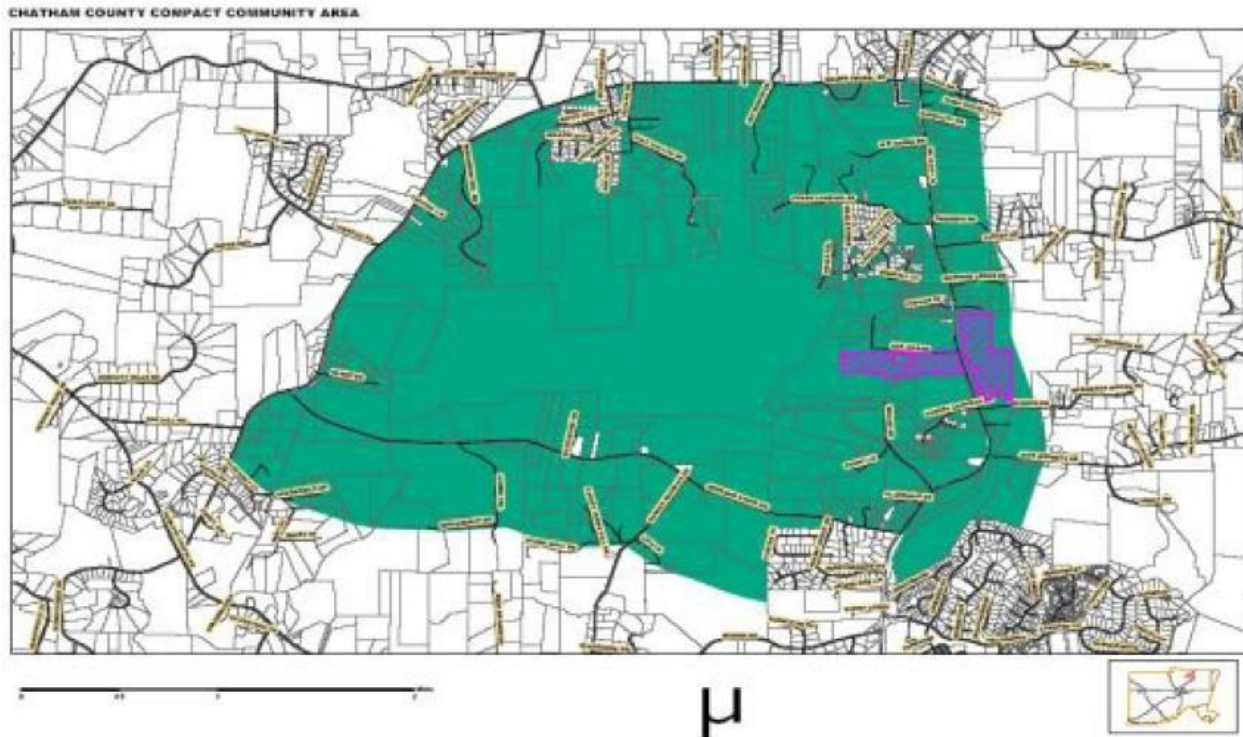


\*Source:

Plan Chatham



Section 5. D. of the Chatham County Zoning Ordinance specifies the Conditional Zoning District, Compact Community- CD-CC, referencing the Compact Communities Ordinance (CCO). The project site for Herndon Farms falls within the area identified as eligible for Compact Community designation. In the figure below, the project site has been highlighted.



\*Source: Plan Chatham

## **Finding #2 – Project is desirable for the public convenience or welfare.**

### **Need and Desirability**

The Herndon Farms Project is planned to meet current and projected future senior housing demand in the region, as demonstrated in the Market Study for this project, found in **Exhibit C**. As shown in the Market Study, census data for the NC Triangle Region overwhelmingly demonstrates a migration into the area from around the country, with the population of seniors in Chatham County growing approximately twice as fast as the general population in the area. While existing developments will absorb some of the senior housing demand, they will fall well short of meeting total demand for the area.

The project capture rate, the amount of housing demand the project will be able to meet, is approximately 3.5% of potential housing demand within a 10-mile radius. This is a conservative number as it bases both variables used to calculate housing demand - population growth and

household formation - on a population-wide basis. Rates for individuals over the age of 55 are higher on both dimensions. For example, non-age segregated households tend to have 2.42 people per household while 55+ households tend to have 1.4 people per household. Furthermore, the project capture rate drops to well under 1% when considering the entire NC Triangle Region.

It is a stated goal of Chatham County to concentrate development to preserve the rural character of the county and support existing farms. The proposed project is in an area designated for this concentrated growth. Furthermore, the combination of residential and commercial properties proposed on this site complements existing uses of adjacent properties with their own commercial and residential makeup. The Developer of Herndon Farms has intentionally sought noncompeting commercial activities to help with commercial survivability in the area.

Herndon Farms, like surrounding developments, has a relatively compact, walkable form with open space and amenities open to the broader community. The project site is planned to offer low-maintenance yards and smaller housing options, which Plan Chatham identifies as attractive to seniors. Concentrating development in the manner done on the project site also allows for residents to access ample open space, receiving proven health benefits from access to the outdoors. Also, by concentrating development on the east side, all but a de minimis amount of the west side is left as continuous open and natural space. All told, approximately half of the proposed development is devoted to open and natural space.

By creating a development for active adults, the proposed project further supports the daytime population, increasing demand for retail and restaurants in the county. The increase in daytime demand in tandem with the additional residential units, may also help attract national retailers, which has been identified as a barrier according to the Plan Chatham.

Additionally, the Chatham County Comprehensive Plan states that a key challenge for Chatham County is “Providing safe and affordable transit for an aging population.” Locating a senior community along the 15-501 corridor will help make public transportation more economical, by providing a larger potential user base in a concentrated area along a well-developed corridor. The Developer spoke with Chatham County Transit to identify the preferred location for a transit stop. A letter of endorsement is included in **Exhibit E.2**. A concern was expressed by Chatham Planning and NCDOT as to this location on 15-501, therefore an alternative location is shown in the site plan **Exhibit B.3**. Chatham Transit and NCDOT will make the final decision as to where the stop will be located.

### **Survey of Similar Uses**

Herndon Farms is the second development to submit a request for a conditional use district under the Compact Communities Ordinance; Briar Chapel was the first to use the Ordinance. Herndon Farms is a much smaller project but is able to accomplish the stated goals of the

Ordinance; specifically, to allow for compact village-style development, at a size that is easily walkable and bikeable by residents and visitors of all ages. The Project also addresses several other points regarding environmental concerns and wastewater infrastructure, and overall represents the highest beneficial use for these parcels.

There are a variety of options for seniors in Chatham County, but there is a limited number of facilities within each category. Several of the existing options have been so successful, they have more demand than they are able to meet. For example, there has been at times a years-long wait list for Carolina Meadows, and the residential units in Encore by David Weekly sold exceedingly well. (That development is reportedly currently projected to be fully built-out in the next year, if not sooner.) Chatham continues to be a preferred destination for active adults and retirees.

Herndon Farms fills a niche different from existing communities. The project pairs an active-adult community where residents own their units, with a congregant care facility, designed to be independent living and operated independently from the residential units. Such a combination, which gives residents the option to gracefully age in place or age with as much autonomy as possible, is not offered by any projects in the NC Triangle. The majority of what is offered is structured as a continuing care retirement community which often require expensive buy-ins. In addition, aside from Fearington Village to a limited extent, no other community in the area offers residents access to community farming and extensive community gardens.

**Active Adult Communities** – Units owned by residents, HOA fees but no other membership fees:

- Fearington Village (not officially age segregated but specifically marketed to and attracts a large concentration of retirees so included for completeness.)
- Encore by David Weekly Active Adult Apartment Rentals:
- Liberty Senior Living (project to be built)
- Congregant Care – Independent Living:
- Twin Rivers Independent Senior Living
- Congregant Care – Assisted Living:
- Chatham Ridge Assisted Living
- The Laurels of Chatham
- Continuing Care Retirement Community:
- Carolina Meadows
- Galloway Ridge at Fearington

**Public Provided Improvement**

The Developer engaged DPFG to conduct a Fiscal Impact Analysis on the Herndon Farms project. This report is found in **Exhibit D**. The conclusions on Public Provided Improvements are as follows:

*“The fiscal analysis has not identified any public infrastructure needs other than utilities and transportation.”*

Herndon Farms will be connected to public water sources existing along the 15-501 corridor. The Developer has confirmed with Chatham County that there is sufficient capacity to supply the proposed project, **Exhibit I**. Further information on this is provided below. No other public improvements will be required, and Herndon Farms will be paying Chatham County for this service.

**Tax considerations**

Tax considerations were also addressed by the Fiscal Impact Analysis on the Herndon Farms project. The conclusions on tax revenues are as follows:

*“At buildout, Herndon Farms is expected to increase the real property tax base of Chatham County by \$78.2 million and generate annual real property tax revenues of approximately \$538,000. The project is also expected to generate annual real property tax revenues of \$86,000 for the North Chatham Volunteer Fire Department.”*

## **Employment**

It is estimated that at least 44 jobs will be created in the Herndon Farms project, potentially more depending on the Congregant Care operator. All jobs created will be in the commercial uses, with a breakdown as follows:

- Congregate Care (Independent Living)
  - 15 employees
    - Jobs Include
      - Managers
      - Assistant Managers
      - Activities Directors
      - Chefs
      - Additional Service Providers
- Daycare
  - 29 Employees
    - Jobs Include
      - Director
      - Teachers
      - Assistants
      - Additional Service Providers

**Finding #3 – The Project will not impair the integrity or character of the surrounding or adjoining areas, and will not be detrimental to the health, safety, welfare, or environment of the community.**

## **Traffic**

As shown in **Exhibit E**, the full traffic report provided by Kimley-Horn, minor improvements by the Developer will be required at the entries. No major improvements are required.

## **Visual Impact & Screening**

The Landscape Plan for the Herndon Farms project is shown in **Exhibit B.4**. The plan shows all the buffers as required, accounting for a requested variance to 50' around the site. However, the effective buffer due to site design, is still 100' and more for most of the view shed buffer area along 15-501. Any areas of the perimeter buffers that require augmentation will be planted with

native tree species selected from **Exhibit B.4.1**. These areas will be maintained to achieve a natural, yet well vegetative transition to neighboring properties.

The Landscape Plan specifically identifies the pastures and gardens throughout the project that are highly visible. The Developer has already sourced numerous farm animals, namely goats, chickens, and ducks, for Herndon Farms. Additional farm animals will be introduced as the project progresses.

As part of the wastewater treatment system, there are also several aesthetically pleasing water features throughout the project. They include a rock-exposed waterfall, meandering stream, aeration fountains in the stormwater ponds, and fountain at the main entry, as shown on the Landscape Plan in **Exhibit B.4**.

### **Lighting**

The Lighting Plan provided by Duke Power is provided in **Exhibit B.5**. Below is the information provided by ECAC's Environmental Impact Assessment, also shown in **Exhibit F**.

*Lighting will meet or exceed all of Chatham County's lighting requirements. In addition, although the proposed project contains an excess of 100,000 square feet of commercial space, the space will require little area lighting and there is no planned retail space that uses excessive lighting. The Developer is committed to providing a lighting plan and fixtures to make the proposed project safe but with as little impact as possible on offsite wildlife and neighboring properties. **Exhibit B.5**— Duke Power Lighting Plan shows the lighting which demonstrates the intent by the Developer with Duke Power to meet or exceed the Chatham County Lighting Ordinance that regulating offsite land and sky lighting impacts.*

### **Noise**

Noise impact is discussed in Section 6.2 of the Environmental Impact Assessment, **Exhibit F**.

*The only times of significantly elevated noise levels will be during the temporary period of horizontal construction to prepare the project site and vertical construction of the proposed buildings. Once construction is completed there is no noise-generating activity that would be detectable offsite that is not already in place namely farming and landscape maintenance of the current 40 acres. The on-site wastewater treatment system produces only minimal noise created by the aeration motors and is located well beyond where this noise would impact any surrounding residents or developments.*



**Chemical, Biological and Radioactive Agents**

There are no hazardous materials currently on the project site nor will there be any used or stored. The Homeowners Association rules and regulations will prohibit the use of pesticides unless it is an acceptable chemical on a HOA Board approved list. The project's landscaping is planned towards low maintenance plants and features, reducing the need for chemical maintenance.

Site and stormwater runoff are covered below. In addition, the onsite wastewater system uses land disposal of the effluent. This method is more efficient in treating household chemicals and medication disposals that normally make it to surface waters than most municipal treatment systems.

**Emergency Services - Fire Protection, Police Protection, Rescue 911**

While this section is optional, the Developer has reached out to each department about service to Herndon Farms. Given the location of the project site along the 15-501 corridor, proximity to Briar Chapel and other large developments, and the construction of a new substation for EMS response at Jack Bennett Road, it is anticipated that all three departments will have no issue responding to emergencies in the Herndon Farms community. A letter of verification is included in **Exhibit G**. The Developer has also had technical meetings with Chatham County Fire Department to confirm accessibility and has made the recommended changes to road widths and turn radiuses requested.

**Signs**

Sign locations are identified on the Landscaping Plan for the development, **Exhibit B.4**. The signs are planned to be a cut-rock from some of the boulders that will be excavated from the site, with black backlite lettering of the community's name and identifying information. It is the strong intention of the Developer to be aesthetically consistent with the surrounding community with any signage. The size of these signs has not been determined but will meet the Chatham County Sign Ordinance requirements.

An interior sign theme has not been decided. The Developer will choose a theme that compliments the Project and meet all of Chatham's sign and lighting requirements. There will be little interior signage as the Project is planned around urban and rural community activities rather than typical commercial.

**Impact to surrounding Land Values.**

RM REIM LLC, an NC Real Estate Brokerage Company, provided the Developer with a Broker's Opinion on impact to surrounding land values. The report included an analysis of comparable residential developments and leveraged data from commercial resources, to look at

both the impact on residential and commercial properties surrounding the project site. The analysis concluded there will be no negative impact on surrounding properties and that, in fact, Herndon Farms has the potential to increase property values of surrounding properties. The full Broker's Opinion is included in **Exhibit H**.

#### **Finding #4 – Consistency with the Objectives in the Land Use Plan**

##### *Chatham County Comprehensive Plan Adherence and Implementation*

The following sections detail how the Herndon Farms project will implement the indicated goals of the Chatham County Comprehensive Plan. As requested in the application, these sections address each of the cited chapters and content on the application for CU-CC rezoning, in the Comprehensive Plan.

#### **Issues and Opportunities**

The Herndon Farms project specifically addresses several points in the Chatham County Comprehensive Plan document in the Issues and Opportunities section. Specific pages of the Plan are noted in parathesis in this section.

Key points are as follows:

- **Employment and Income:**
  - As per the Fiscal Impact Analysis, **Exhibit D.**, the Project increases employment in the area by creating an estimated 44 jobs on site (page 15).
- **Retail Sales Leakage:**
  - The Project increases both residential density and daytime population, which will help attract national retailers and increase demand for local retail, restaurants, and other service businesses (page 16).
- **Rural Character:**
  - The Project reflects the rural character of Chatham County, by incorporating a community farm and extensive community gardens throughout the project site. Preserving the rural character was identified as the most important goal during the planning process (page 18). Additionally, the project site is situated along the 15-501 corridor, which has been identified as highly desirable for residential development as shown in the Plan Chatham Land Use Suitability Analysis (appendix to Plan Chatham). Concentrating development this way relieves pressure from increasing land values on the rural parts of the county.
- **Mix of housing styles and compact, walkable form:**

- The project concentrates the site development to approximately a little more than half of the overall project site. The site will be graded to a 5% grade and sidewalks installed, facilitating resident access to the entire community. Four single family housing styles will be offered, creating options for residents (page 23).
- **Preferences of Seniors:**
  - Herndon Farms will be designed with an eye for low to no maintenance. While individual yards will be relatively small and maintained by the HOA, the community will provide residents with at least two community gardens and a community farm to participate in as they like (page 25).
- **Support for Agriculture:**
  - The proposed Herndon Farms project is designed around a working community farm. It is anticipated that production from the farm will be enjoyed by the residents and the commercial users in the development. A community farm stand will be encouraged (page 26). While this will be a small community operation, the reflection of the county and education opportunities will further support for community agriculture throughout the county.
- **Providing safe and affordable transit for an aging population:**
  - Locating an active-adult community with a commercial component along the 15-501 corridor increases the potential user base for future bus transportation, making such an offering more financially viable. The Developer has worked with Chatham County Transit and received their input and support of the planned transit stop location on 15-501 and overall plan. In addition, an alternate bus stop location is shown in **Exhibit B.3** if the 15-501 location is not viable.
- **Access to Open Space can improve health outcomes:**
  - The open space types incorporated throughout the development will encourage residents and the community to participate in outside activities and create social connectivity (pages 36 & 37).

## **Goals and Objectives**

### **Goals:**

#### **1) Preserve the rural character and lifestyle of Chatham County.**

- As stated, the Herndon Farms project is oriented around a community farm, several community gardens, and a koi pond. By orienting the project around these amenities, Herndon Farms can reflect the rural character of Chatham County.
- The community farm is also anticipated to produce food and materials, namely eggs, honey, and goat-milk, to be used by residents.

**2) Preserve, protect, and enable agriculture and forestry.**

- By concentrating residential and commercial development, Herndon Farms allows for larger scale farming operations to remain unaffected by development and increased tax values.

**3) Promote a compact growth pattern by developing in and near existing towns and communities and in designated, well planned, walkable, mixed-use centers.**

- The Project is located within the rapidly developing 15-501 corridor, earmarked by Plan Chatham as a desirable location for future density. The project is directly across from the existing Briar Chapel commercial development and directly north of the proposed Vickers Bennett project. Additionally, Herndon Farms is directly adjacent to two existing commercial uses, a veterinary clinic, and a self-storage/RV-storage business, both complementary uses to an active-adult community.
- The project will itself be interconnected by streets and sidewalks. Most of the site will be graded to an approximately a 5% grade, facilitating accessibility by the residents.

**4) Diversify the tax base and generate more quality, in-county jobs to reduce dependence on residential property taxes, create economic opportunity, and reduce out-commuting.**

- Herndon Farms is expected to generate at least 44 new jobs. The project will also diversify the tax base by drawing tax revenue from over 150,000 square feet of commercial use.
- It is anticipated that residents of the project will likely contribute to small business creation, as many retirees either continue to consult in their respective fields of expertise or pick up “twilight careers,” often in the arts.

**5) Conserve natural resources**

- The wastewater system for the project will generate a Type 2 effluent, clean enough to be used for irrigation of some food crops and in water features. This is cleaner than the effluent produced by most of the county’s wastewater systems and can be cleaner than some of the runoff and discharge that runs into Jordan Lake.
- By concentrating development on one side of the total property area, the Developer has left close to 40 acres of the site as open space, largely undisturbed, though the Developer will work to connect trails created in this space to the other adjacent developments.

**6) Provide recreational opportunities and access to open space.**

- The community farm, community event center with pavilion, community gardens, dog park, koi pond and trails will be open to individuals beyond the residents of the project.
  - Daycare clients will benefit from access to recreation on the farm before and after pickup. Surrounding residents will be welcome to enjoy the farming atmosphere and community farm stand, as well as potential farmers' markets and community events.
  - In in addition to the provided sidewalks on both sides of streets, trails will be provided to facilitate access to farming and gardening activities.
- The project's design will welcome and encourage non-residents to visit, particularly families of the residents. Creating an environment that people of all ages like to visit is a core motivation of the Herndon Farms project.

**7) Provide infrastructure to support desired development and meet economic and environmental objectives.**

- By concentrating residential and commercial development along the 15-501 corridor, the project bolsters potential public transit ridership, making a 15-501 North-South route more desirable.
- Additionally, the high-density of residents will help with local retail survivability.
- The compactness of the development, with the comparably low impervious and large open space creates environmental efficiency.
  - Stormwater is easier to mitigate.
  - Natural areas are left to evolve.
- By meeting the criteria of EPA's WaterSense program the project will achieve a more than 50% reduction of water and wastewater design loads.

**8) Become more resilient by mitigating, responding, and adapting to emerging threats.**

- Additional environmental initiatives include:
  - Solar power at the wastewater treatment plant and potentially over some parking areas.
  - Reduction in vehicle miles through concentration of development and connectivity.
  - Farm-to-table initiatives through use of community farm-grown foods and animal products.
  - Educational opportunities to residents and the broader community through involvement in the community farm.

**9) Provide equitable access to high-quality education, housing, and community options for all.**

- The Herndon Farms project will incorporate a variety of housing sizes and styles to open opportunities to a broad set of active adults.
- The community mix between residential units and commercial uses has been thoughtfully put together to allow for age-in-place living for a variety of budgets. The community does not require a “buy-in” which often excludes access by many seniors.
- By concentrating active adults, the community will support incremental in-home care, making such care commercially viable by providers and cost-effective for residents.

**10) Foster a healthy community**

- The Herndon Farms project is founded around two philosophies:
  - Individuals benefit from an increased quality of life by having access to community and an outdoor lifestyle facilitated by the farming and gardening components.
  - Individuals benefit from increased quality of life by having autonomy and control over their lives by aging-in-place and by participating in a community where they can leverage limited support yet retain independence.
- The commercial and residential mix, as well as the overall site design influenced by these two philosophies, creates a unique development that not only benefits residents and participants but Chatham County as a whole.
- One key element in creating a community integrated in the surrounding County is including a daycare in the development. Research has demonstrated the benefits to seniors to see and be nearby younger people. In addition, the inclusion of a daycare can provide volunteer opportunities to seniors in the community, draw families into the community during the day, particularly those who may have grandparents living in Herndon Farms, and over all contributes to an environment where all ages may thrive.



## **Economic Development**

Additional opportunities, as seen by the Developer, that are a benefit to the Economic Development of Chatham County.

As mentioned, by increasing the daytime population of the County, the Developer anticipates a positive impact on commercial centers surrounding the Herndon Farms project. Specifically, there will be an increase in daytime demand, which is essential for the success of the many existing restaurants and service-based businesses in the County (ED policy 4). Additionally, by increasing the County's daytime senior population, the project will potentially highlight the discretionary income of many of Chatham's seniors, which in turn will support Chatham County's business-attraction efforts.

As part of Chatham's efforts to support small businesses and cottage industries, Plan Chatham highlights support of home-based businesses (Recommendation 01, Strategy 1.1). Plan Chatham also highlights the County's goal of supporting entrepreneurship and arts (Recommendation 03), areas that often go together with one another. As previously mentioned, it is not uncommon for seniors to pick up "twilight careers," such as in the arts, or to consult in fields they are expert in, long after they retire. Bringing new senior residents into the County is anticipated to have an economic boost from small-business creation, as newly-arrived seniors pursue these endeavors.

Also related to Recommendation 03, a key component of Herndon Farms is the desire to make it inviting to the community at large. While the farms, gardens, and dog park all serve as an amenity for residents, by design these features are open to the community to visit and enjoy as well. It is the goal of the Developer to create a vibrant destination that families enjoy visiting. This encourages connectivity of residents with their families and the communities surrounding the project. Given how Herndon Farms reflects the culture of Chatham County and is open to the public, a desire of the Developer is that Herndon Farms will encourage local tourism and cultural opportunities, through sponsoring events and making resources within the project available to the public.

Perhaps one of the biggest contributions Herndon Farms will make to the County, however, is recognized in recommendation 03, Strategy 6.4 (page 58) – "Recognize and take greater advantage of Chatham County's experienced, well-educated senior population in economic development activities." It is likely the residents of the project will contribute to this strategy in the following ways:

- The Herndon Farms project lies 1 mile north of a new campus for the Chatham County Community College. This location will allow for retirees in the project to easily access programming at the community college, which may include student mentoring and teaching.

- By bringing additional active adults to Chatham County, Herndon Farms increases the pool of individuals who may participate in additional economic development programs such as SCORE (Service Corps of Retired Executives).

In support of Recommendation 04, Provide equitable access to high-quality education and workforce training, it is the vision and the desire of the Developer for both the residents and the amenities to be tightly connected to the Chatham County Community College. The potential benefits of a deep relationship between the project and the community college population are numerous. Whether through mentorship programs, job training, particularly in the field of healthcare, agriculture, and environmental education training through access to the farm and gardens, or participation in continuing education and academic seminars from the future Herndon Farms residents. Proximity to the Chatham County Community College campus in Briar Chapel has the potential to beneficially impact the economic development of the County and its residents.

### **Land Use Policies**

The Herndon Farms project is a well-designed Compact Community. As specified in both **Land Use Policy 3** and **Land Use Policy 5**, Herndon Farms will support a mix of commercial and residential uses, within a site that is both walkable and reflective of the rural character of Chatham County.

The focus of the community's village center will be the Community Event Center with a covered pavilion, barn, small farm stand, and space suitable for events, which will encourage residents and the public to visit Herndon Farms. Additional uses of this area include a seasonal farmers' market, market for crafts and foods produced by the community farm (eggs, products made from goat milk, etc.), live music events, and other small-scale festivals.

Additionally, the project site is ideally located along the 15-501 corridor, encouraging, and supporting **Land Use Policy 4**, supporting future transit through land use decisions. By concentrating development on a main corridor, the development contributes potential demand/ridership for public transportation projects.

The Developer has worked with the NCDOT to fulfill **Land Use Policy 6**, specifically strategy 6.4, to manage access to the site. Herndon Farms has two access points along 15-501 N.

As stated, the proposed development is designed around a community farm with other outdoor opportunities through community gardens, trails, and a koi pond, thus fulfilling **Recommendation 03**, Bringing open space in its many forms to the forefront, making it a key/integral component of the development pattern. Not only is this good design, but the Developer believes access to the outdoors is vital to the quality of life of future Herndon Farms residents.

**Specific Land Use Description for the proposed Herndon Farms project is as follows:**

Land Use Description: Community Center (p47)/Compact Community (p66)

- Commercial use of at least 150,000 square feet as a Daycare and Congregate Care facility. The Congregant Care facility, specifically an Independent Living facility, will be encouraged to include a coffee shop or stand, and open amenities such as dining and services to the residents in the Herndon Farms residential units.
- Residential concentration of 161 units. Residential unit diversity includes:
  - One and two-level, single-family homes
  - Two and three level (inclusive of a basement garage), high-density single-family homes (“Rowhomes”)
  - One and two level, duplex homes
  - Two level town homes
- Herndon Farms will be anchored by a community farm and community event center, open to public enjoyment. The focus of the community event center will be a pavilion, barn, and farm stand as well as seating options encouraging residents and community members to congregate and enjoy community. As stated, there are multiple community-oriented options for use of this space and the Developer anticipates it will be central to the fabric of the project.
- The project will also feature a koi pond and at least two community gardens. These features are also integral in stormwater and wastewater management.
- The project site is directly across from the existing Briar Chapel commercial area and adjacent to the proposed Vickers-Bennett project. The project site is also immediately adjacent to existing commercial properties, currently operating as a veterinary clinic and a U-Haul Self-Storage facility with RV storage.

**Natural Resources**

A discussion of the impact of the development of the project site is found in the Environmental Impact Assessment, **Exhibit F**. In addition, the Developer provides the following information, which identifies some of the initiatives planned for Herndon Farms as it progresses, either by design or planned HOA statements. This information addresses a few the points raised in the Chatham County Comprehensive Plan in the section on Natural Resources and the section on Resiliency.

- Encourage birds in the community by growing plants that provide food for foraging.
- Educational programs for suburban-habitats creation and maintenance will be offered.
- Final lighting plan leaves areas darkened next to natural areas for transient animals and to increase bat populations.

- Use native plants in the permanent landscaping wherever possible and transplant trees and plants already on site to new locations after grading.
- Establish artificial wetlands and augmenting existing wetlands using the Type 2 wastewater generated by the treatment facility.
- Use the Type 2 effluent for irrigation and other water features.
- Wastewater treatment facility will have solar panels to help offset operation cost.

### **Parks and Recreation**

The Herndon Farms project includes several features encouraged by Plan Chatham's recommendations on Parks and Recreation. The community gardens, farm, dog park, and koi pond will all be open to the public, addressing several points in **PR Policy 4**. Parking facilities will exist specifically for most of these amenities and will be designed with a mind toward accessibility, like the rest of the project (**Strategy 1.2 and 1.4**). It is the hope of the Developer that a strong connection is fostered between the Chatham County Community College and the Herndon Farms community, encouraging research and education in ecology and environmental programming (**Strategy 1.5 and 1.6**).

As previously mentioned, the project site spans 15-501 leaving the west side of the project site undisturbed (**Strategy 2.3**). However, this area is adjacent to the Briar Chapel trail system, which currently connects to the property. It is the intention of the Developer to create additional single tract trails in this area as an interconnecting trail system and to expand this valuable natural resource (**PR Policy 3**). *(It should be noted, expansion of the Briar Chapel trail system will require explicit approval of the Briar Chapel HOA and will not occur should the proposal be turned down. The Developer may reach out to the Parks and Recreation department for assistance per Strategy 3.3.)*

The community farm and related structures; pastures, barn, farm stand, covered areas, and any additional seating, is the Village Center for Herndon Farms. The creative use of the easement for the farm, and additional parking for accessibility, allows some of the designated open space to be available for events open to the public (**Strategy 4.3**) though, as mentioned, this is not the only area of open space within the project.

Finally, the Herndon Farms community is designed with maximum walkability, enabling connectivity to future development adjacent to the property. Such connectivity will further encourage the broader community to visit the amenities at Herndon Farms, benefitting both the residents of Herndon Farms and of Chatham County.

**Finding #5 – Adequate utilities, access roads, storm drainage, recreation, open space, and other necessary facilities have been or are being provided consistent with the County's plans, policies, and regulations.**

**Water Source and Requirements**

Herndon Farms will have a buildout water design requirement of approximately 44,820 GPD (after 50% calculated reduction) and the project will tap onto the Chatham County water supply system. The availability of water for the development is verified by a letter from the Chatham County Utility Department, **Exhibit I**.

**Wastewater Management**

Hendon Farms has a design load of approximately 90,000 gallons per day (GPD). The Developer's application to NC Department of Water Quality (DWQ) requests a 50% reduction for the installation of water saving devices in all the homes and businesses, making the actual expected water use and wastewater needs to be about 45,000 GPD. The goals and guidelines of EPA's WaterSense program will be required for all buildings.

The Wastewater Request being submitted by Herndon Farms to NCDWQ for permitting is for a non-discharge permit needed for the onsite treatment system; see **Exhibit J** for the preliminary calculations for this permit. The membrane bioreactor system uses an aerobic treatment technology, which is much more efficient than typical anaerobic treatment and the system produces little odor and noise. The treatment facility located on the west side parcels will produce a Type 2 effluent that is cleaner and has more usages than Type 1. The attached citation, **Exhibit J.5** "15A NCAC 02U .0301 RECLAIMED WATER EFFLUENT STANDARDS" from the NC Division of Water Quality specifies the difference between the two effluents.

Irrigation water needs for farming will be provided by the onsite wastewater treatment system, which will be producing Type 2 effluent suitable for some crops, landscape irrigation, and onsite water features. Water for the farm operations will be augmented by an onsite well and not use water from the Chatham County water supply. The excess onsite treatment capacity for wastewater is currently projected to be 20,000 GPD. The excess capacity will not be used offsite, but the land application plan for the approximately 45,000 GPD will rotate through the areas to promote a healthier landscape.

**Water/Sewer Impact Statement**

Water and Sewer Impacts are detailed in the EIA **Exhibit F**. In addition, Herndon Farms will be treating its own wastewater onsite and there is no impact to a Public Utility for this use. Chatham County Utilities has agreed to supply the potable water of approximately 45,000 GPD and did not relay that there was any negative impact to Chatham potable water supply system,

### **Access Roads**

As previously discussed, Herndon Farms will have two access points as shown on the site plans. The southern access point will lead directly to the commercial buildings and will have approximately 100' of storage along 15-501N. The northern access point will lead to residential lots and will provide a right-in-right-out access. The layout, upgrades, and flow details are further detailed in the Traffic Impact Analysis in **Exhibit E** from Kimley-Horn and **E.1.1** is the DOT access point analysis for the development's access points.

### **Stormwater Runoff**

The clearing and grading for the proposed project will result in soil disturbance on the east side and a small area on the west side for the wastewater facility. The balanced-site grading process will move earth and rocks from the higher elevations to the lower elevations and, when completed, stored topsoil will be placed back on areas to be landscaped. In addition, a mix of suitable soils, organic matter, and off-site material will be applied to areas for gardening, animal pastures, and landscaping. During clearing and grading, some soils will be eroded, but the impacts from this will be minimized by following an approved stormwater plan that conforms to the requirements of the North Carolina Sedimentation Pollution Control Act of 1973. No contamination of soils is expected from the development of the proposed project.

Drawings shown in **Exhibit B.6.1, B.6.2** and **B.6.3** show the location of the planned stormwater retention ponds and other preliminary components. Additional details required will be submitted for the required Land Disturbance Permit from Chatham County before the final plat is approved.

To meet the watershed protection ordinance and the Nutrient Sensitive Waters (NSW) requirement for the Herndon Farms project, the site will provide stormwater management facilities that meet the requirements of the high-density option from the NPDES Phase II stormwater regulations. The main criteria that will be addressed are as follows:

1. The measures shall control and treat the difference in stormwater runoff volume leaving the project site between the pre- and post-development conditions for the 1-year / 24-hour storm. Runoff drawdown time shall be between 2 to 5 days.
2. All structural stormwater treatment devices will be designed to provide a minimum of 85% average annual removal for Total Suspended Solids from stormwater runoff generated from proposed impervious surfaces.



**Conclusion**

The Developer of Herndon Farms offers these submission documents for approval by Chatham County for rezoning from Residential 1 to a Compact Community.

The Herndon Farms Development will:

- Create a unique and vibrant community that will meet the growing demand for Senior housing in Chatham County.
- Meets or exceeds all requirements for the “Five Findings” required for rezoning.
- Make the highest and best use of the property by using the Compact Communities Ordinance’s more dense housing allowances mixed with commercial space to create a viable and sustainable community.
- Support the goals expressed in the Chatham County Comprehensive Plan.

The Developer believes that Herndon Farms best represents the rural core values of Chatham County, of which many people are drawn, while allowing for mindful expansion and welcoming of new residents to the Chatham community.