

## Project Summary

|                           |   |
|---------------------------|---|
| <b>Location:</b>          | 733 Plantation Estates Dr.  |
| <b>Owner:</b>             | Adult Communities Adult Services, Inc.  |
| <b>Agent:</b>             | Robert J. Romano, AIA   |
| <b>Current Zoning:</b>    | C, R-15, R-20   |
| <b>Proposed Zoning:</b>   | R/I (CD)  |
| <b>Existing Use:</b>      | Continuing Care Retirement Community, vacant land.                                      |
| <b>Proposed Use:</b>      | CCRC with addition of new skilled nursing building and 49 new independent living units. |
| <b>Community Meeting:</b> | Occurred January 21, 2014   |

## Summary of Request

The applicant requests rezoning to allow for construction of the following:

- New skilled nursing facility
- Up to 49 new independent living units
- Minor additions to existing structures
- A new drive access to Fullwood Ln

## Staff Recommendation

Staff encourages the conversion of this old Conditional zoning to R/I (CD) to allow for the continuation of an existing, established retirement community. Pending resolution of any outstanding issues, staff recommends approval of this request.

### Planning Staff Review

#### **Background And History**

The site of Plantation Estates is zoned Conditional and was opened in 1988. Many changes to the original conditional zoning have allowed for expansions throughout the years. However, since Town policy is now to rezone out of the old Conditional only zoning district, this request involves a request to the R/I district.

#### **Details of the Site Plan**

There are only a few primary changes to the existing site. The main feature of the request is the new, 2-story skilled nursing building that will occupy the back of the existing site and a small portion of an undeveloped R-20 parcel. In addition to the nursing building, a new drive access to Fullwood is planned as well as two potential future development areas. The driveway access is a concept that was presented as part of the Village at Plantation Estates rezoning in 2012. The driveway is not currently allowed under the existing zoning.

#### **Summary of Proposed Conditions**

1. Maximum of 410 independent living units are allowed (Increase of 13%)
2. Maximum of 200 assist living and skilled nursing units (Increase of 40%)
3. New driveway access on Fullwood
4. Brick or stone materials on 50% of façade of any new buildings (Note 5.4)
5. Dedication of 15' wide access along property boundary to facilitate Bubbling Well off road connector to Fullwood. (Additional portions of trail from other property owners may be required) (Note 6.2)

### Planning Staff Review

#### **Outstanding Issues/Staff Comments**

1. Town Staff recommended that the C/O for the new skilled nursing building be tied to completion of the Fullwood access to the site. This access reduces the mileage from the fire station to the building from about 2 miles to 1 mile and also eliminates fire truck movement through the signal at 51 and over speed humps within the site. It is our understanding that ACTS is agreeable to this timetable as it matches up with plans for the new Village at Plantation Estates community across the street. The conditional note will need to be amended to reflect this commitment.
2. We are continuing to work with the applicant to ensure that fire truck access is designed to provide adequate service to the new building. This may entail changes in layout to the proposed parking areas on each side of the building.
3. The area of the site to be dedicated to the Town for greenway access will need to be further clarified on the site plan. There is a narrow point on the ACTS site where there is not sufficient room for greenway thus requiring the trail to cross a private property owner's land. The best access along Bubbling Well for the trail is owned by Genesis Management, who we believe to be the original owner of Plantation Estates.
4. Pursue pedestrian connectivity between Marion Dr at such time as that area redevelopments with a residential development of more than 50 units. A pedestrian connection would benefit both ACTS residents and adjacent residents and create opportunities for a loop walking route.

### Consistency with Adopted Plans and Policies and Town Vision Statements

The expansion of Plantation Estates is consistent with Land Use Plan recommendations that this portion of Highway 51 remain residential in nature. The Land Use Plan further calls for increased cross connectivity:

*“Consider roadway cross connections among Reverdy Lane, Elizabeth Lane, Sardis Plantation Drive, Courtney Lane, Lakenheath Lane and Bubbling Well Road to provide additional access to Pineville Matthews Road.”*

### Reports from Town Departments and County Agencies

#### **Matthews Police**

Memo Attached

#### **Matthews Fire**

Memo Attached

#### **Public Works**

Driveway access to Fullwood should be installed prior to opening of nursing facility

#### **Matthews Parks and Recreation**

Memo Attached

#### **Charlotte Mecklenburg Schools**

N/A

#### **PCO Concept Plan Approval Required?**

Yes

#### **Charlotte Area Transit**

There are no transit stops adjacent to the site or nearby. The nearest stops along Route 51 are at the Matthews Park and Ride and the Arboretum Shopping Center in Charlotte.

**Impact Analysis**

The primary impact of the zoning request is an increase in call volume to Fire & EMS. Assisting living and independent living units will increase by 40%. However, the new access point on Fullwood will shorten response times to the nursing facility in comparison to today.

**Projected Financial Impact of the Request**

We have used two different methodologies to attempt to determine the financial impact to the proposed facility expansion. The first attempt is to look at only the nursing building that is proposed. Due to the vastly different land values and facility sizes and ages throughout the County, we are benchmarking the facility with two existing skilled nursing establishments in our Town limits.

| <b>Facility</b>  | <b>Year Built</b> | <b>Beds</b> | <b>Tax Value</b> | <b>Matthews Tax Bill</b> |
|------------------|-------------------|-------------|------------------|--------------------------|
| Carrington Place | 1993              | 166         | \$5,363,500      | \$17,029                 |
| Royal Park       | 2013              | 169         | \$6,183,400      | \$19,632                 |

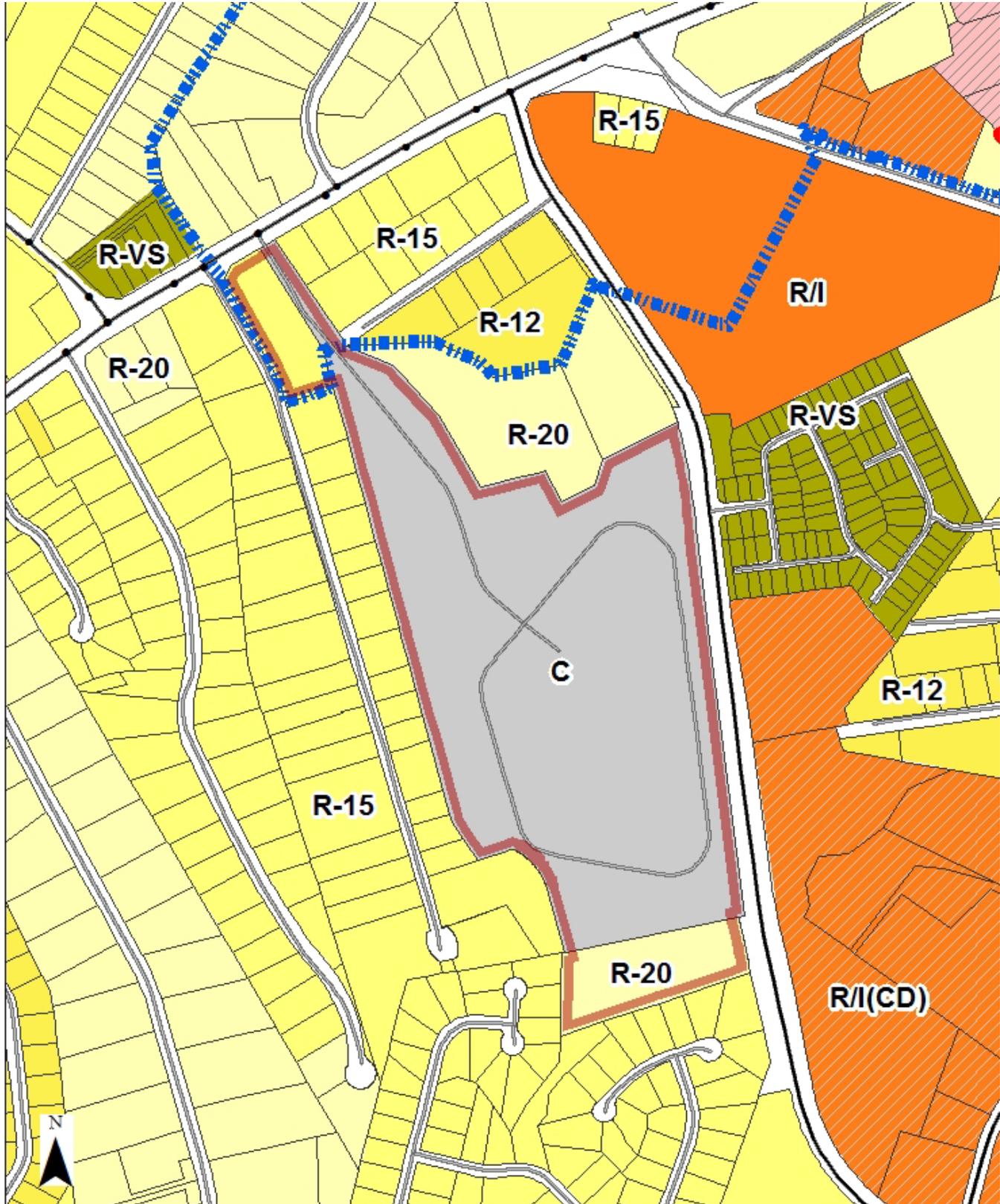
The proposed skilled nursing building at Plantation Estates is planned to be about 15% larger than the 2 existing facilities in Matthews and will total 200 beds. Local Matthews taxes are expected to be in the range of 15% higher due to the increased size of the building. Therefore, the financial impact of only the new nursing building is estimated at approximately \$22,000/year.

On a broader scale, the total building footprint that would be allowed under this rezoning would increase by 40%. The total value of structures at the site today is about \$31,000,000. From a broad brush perspective, the increase of building footprint at the site if fully built out could yield a total of approximately \$38,000 in new tax revenue (including the above mentioned \$22,000).

All 3 parcels currently generate a total of \$115,916 in annual property taxes for Matthews.

*\*The above are estimates of potential tax generation based on research by the Planning Department. The tax assessors office will ultimately determine the value of the property.*

Area Zoning Map Depicting Boundaries of Proposed R/I (CD) Zoning



Site Plan



**Renderings**



## Memorandum

**From:** Chief Rob Hunter  
**To:** Jay Camp, Town Planner  
**Date:** January 29, 2014  
**Subject:** Review of Proposed Site Plan

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**Regarding:** Application 2013-608 / 'Plantation Estates'

After a complete review of the applicant and the requested location, I find / recommend the following:

- X No concerns with proposed site / location
- Concerns with proposed site / location (see below)
- X Recommendations for the proposed site plan

**Comments:** I have no concerns with the proposed expansions and/or changes. While it was mentioned in the Notes about the addition of a gate-controlled access point onto Fullwood Lane, due to the population of the property and the fact that with a single point-of-access (current), the heightened risk of emergency response delays should that single point-of-access be disrupted should dictate that we require the addition of the access point onto Fullwood Lane. Gate-controlled access will be acceptable, though they should be reminded of ordinance requiring emergency response access for that system.

As to the staff question regarding the extension of Marion Drive to Fullwood Lane, with the addition of the above-mentioned access point, I do not feel this would be greatly beneficial. Additionally, due to the close proximity of the Marion Drive intersection with Fullwood Lane to the NC51 intersection, I would be concerned for increased likelihood of vehicle crashes should traffic at that location be increased dramatically.

If you have any questions, please let me know.

**The employees of the Matthews Police Department strive to promote a safe community by preventing crimes and reducing the fear of crime, while treating all individuals fairly and with respect.**

**Our members will demonstrate honesty, professionalism and integrity, while building the partnerships necessary to enhance the safety of our community.**

## MEMORANDUM

TO: Jay Camp, Senior Planner

FROM: Dennis Green, Fire & EMS Chief

DATE: Wednesday, February 05, 2014

RE: Plantation Estates Rezoning

The medical facility will be at the rear of the complex. As most of our calls for service are to the medical facility it imperative that the future gate connection be installed when the facility is built. The long roadway off of Matthews-Pineville Road increases our arrival time to the patient or a fire emergency. The speed bumps on this road are quite high further reducing our ability to provide aid in the desired time frame. I also agree with Chief Hunter's statement "that a single point of access is possibly promoting a critical safety risk should that single access point be blocked / inaccessible." The gate there will need to meet the Town's Gated Community Ordinance.

There is an elevated walkway to an existing independent living building. It is not clear what the clearance is for the walkway but in order to allow clearance for the ladder truck it must be a fifteen-foot minimum clearance without any speed bumps near it. The front overhang of the building must have a twelve-foot clearance for Medic's ambulances.

I have concerns about both side parking lots. Using our templates the right side parking lot appears to barely allow us the ability to turn our largest engine around the middle island. Neither the ladder nor the rescue truck can make the turn. The ladder would not be able to be setup to be used on this side of the building.

The parking lot on the left side of the building does not allow any turning ability. This is acceptable depending on what is located at that entrance. Most likely the ladder would have to be backed into this area in order to be used effectively. The implementing the action in the next paragraph would alleviate the need to back in.

There is no ability to reach the rear of the structure. There appears to be balconies along the rear courtyard. In the past we have required that either a road or a concrete reinforced grass paving system be installed. I am not sure if the topography allows either but I highly recommend that one of these means of access be installed completely around the rear of the building.

## Rezoning 2013-608 Plantation Estates

TO: Jay Camp, Senior Planner  
DATE: January 21, 2014  
RE: Comments on Zoning Project  
FROM: Corey King, Director

In review of zoning request 2013-608-Plantation Estates and conversation with the Planning Department, I believe there is an opportunity to enhance pedestrian and bike connectivity with this project. The Comprehensive Bicycle Plan displays a connection in the project area, between Bubbling Well Road and Fullwood Road. I suggest further investigation into completing this trail segment either as a condition of rezoning or timing the Town's completion of the trail along with Plantation Estates' project.