CHARLOTTE FUTURE | 2040 COMPREHENSIVE PLAN

Planning Commission
March 4, 2019

Timelapses show 50 years of development, change in Charlotte

A time lapse tour of Charlotte locations.

By John D. Simmons

LIVING HERE GUIDE

Charlotte is in the midst of a growth spurt. These are 5 of the fastest-changing areas.

BY ELY PORTILLO
eportillo@charlotteobserver.com

August 03, 2018 08:36 AM
Updated August 04, 2018 05:44 PM

If Charlotte were a human, the city would likely be a teenager, getting taller and busting out the seams of its clothes in the midst of a huge growth spurt.

The city's building boom shows no signs of stopping, with dozens of people a day moving

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Charlotte falls off business magazine's list of metros with most economic growth potential

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Charlotte Fast Facts
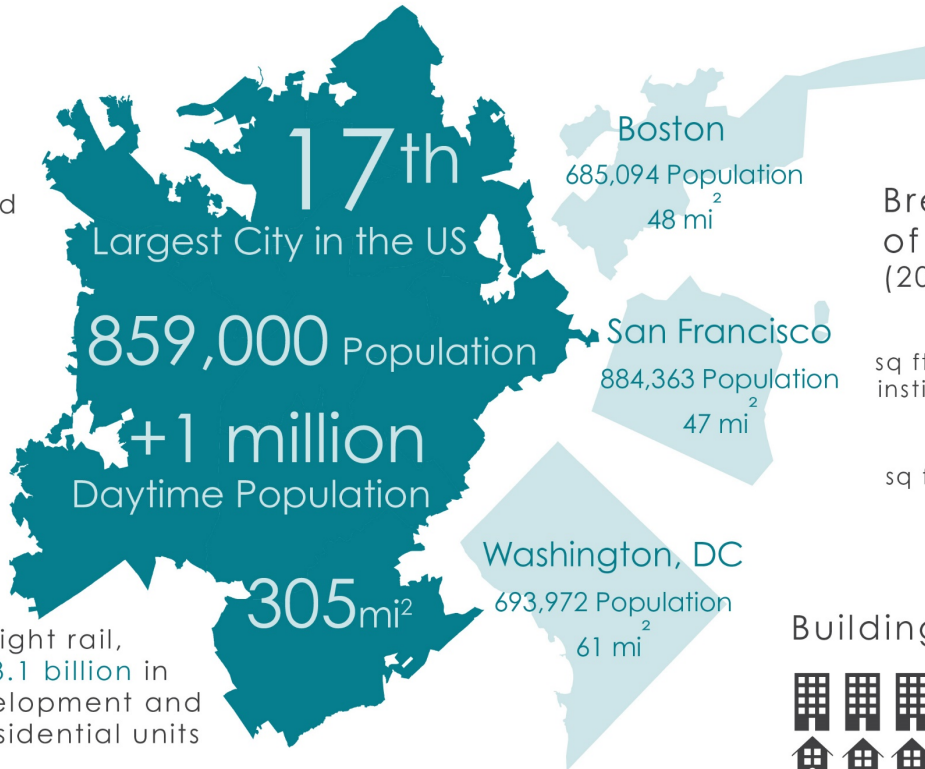
47% Tree Canopy

840 Miles of Creek and Streams

2,250 Miles of Sidewalk

2,450 Miles of Streets

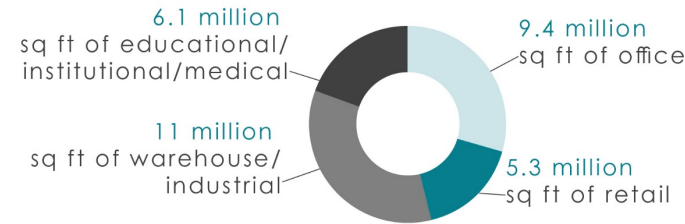**19** Miles of Light rail, driving $3.1 billion in new development and 13,000 residential units

10 Miles of streetcar at completion, driving $400 million in investment along the corridor

17th Largest City in the US

859,000 Population

+1 million Daytime Population

305 mi²

Boston
685,094 Population
48 mi²

San Francisco
884,363 Population
47 mi²

Washington, DC
693,972 Population
61 mi²

Breakdown of 56,802 New Residential Units (2010-2018)

71% multi-family

29% single family

Breakdown of 32 million sq ft of New Non-Residential Buildings (2010-2018)

6.1 million sq ft of educational/institutional/medical

9.4 million sq ft of office

11 million sq ft of warehouse/industrial

5.3 million sq ft of retail

Building Permits (2016 - July 2018)

🏠 1,000 = residential

🏢 1,000 = non-residential

With a Strong Economy and Workforce

688,000 Jobs in Mecklenburg County (31% employment growth since 2010)

492,000 Labor Force and unemployment rate of 3.8%

322,000 Employees commute to Charlotte everyday

6th Busiest airport in terms of operations, 10th in passenger travel

128 Freight train trips in Charlotte Region daily

38,000 Transportation and Warehouse employees in Mecklenburg County

#1 Place to live and work for tech professionals, according to CompTIA's 2018 Tech Town Index

We are Diverse, and Well Educated

58.1% People of Color

**45.0%** Bachelor's Degree or Higher

34.4 Median Age

17.1% Foreign Born

53.2% Homeownership

Charlotte Growth

225,400 JOBS in 5 years

242,396 HOUSEHOLDS in 5 years

+120,552 new Charlotte residents in 7 years

	JOBS AND HOUSEHOLDS			POPULATION GROWTH	
	CHANGE IN JOBS (2010 TO 2015)	**CHANGE IN HOUSEHOLDS (2010 TO 2015)**	**RATIO OF NEW JOBS TO NEW HOUSEHOLDS**	**CHANGE IN CITY POPULATION (2010 TO 2017)**	**CHANGE IN COUNTY POPULATION (2010 TO 2017)**
CHARLOTTE MSA GROWTH	225,400	242,396	.93	120,552	157,209

Charlotte Housing Cost Increase
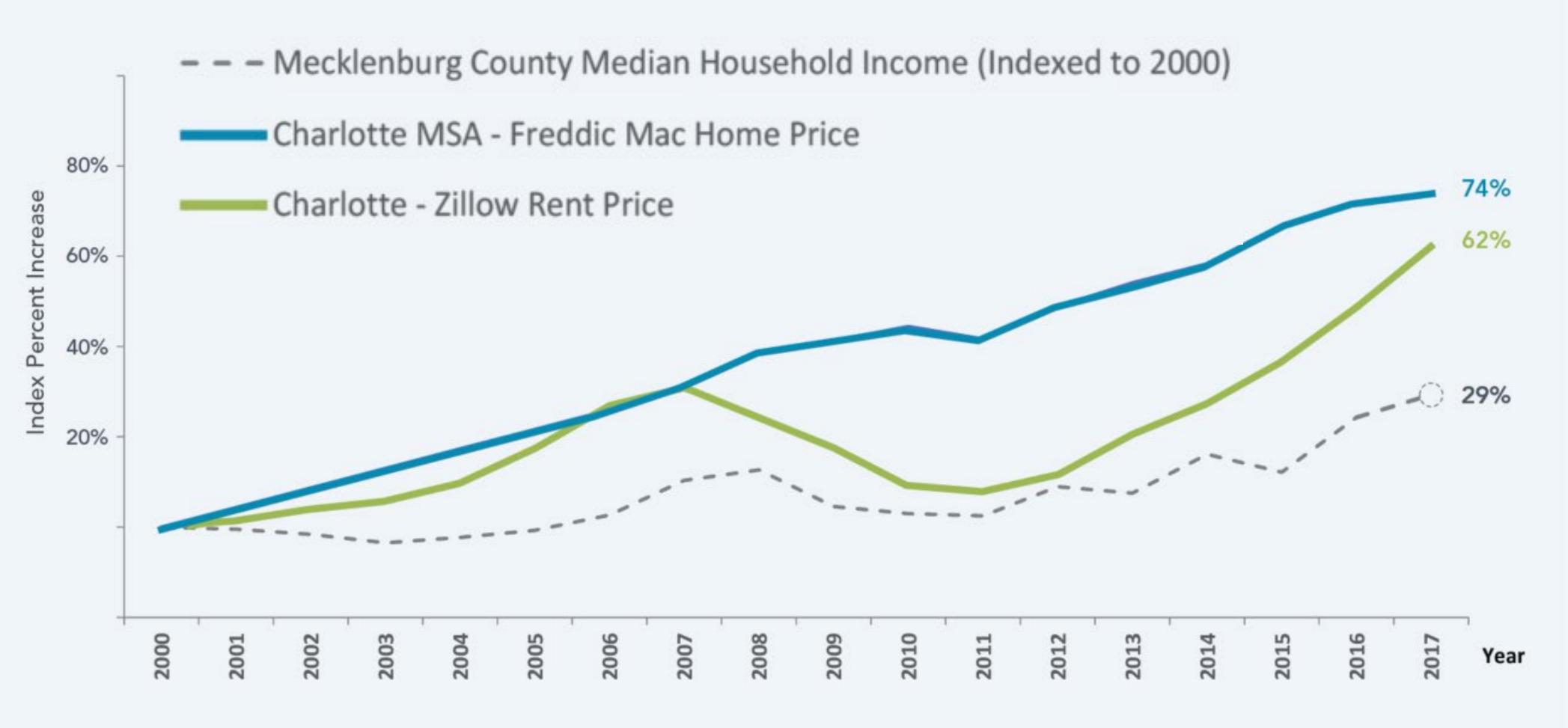
Charlotte in 2040

	FORECAST	2010	2040	2010-2040 FORECAST		
				TOTAL	ANN #	ANN %
POPULATION	MECKLENBURG COUNTY	919,600	1,491,900	572,300	19,077	1.6%
POPULATION	% CAPTURE OF CONNECT AREA	38%	40%	43%		
POPULATION	CONNECT AREA	2,431,500	3,766,081	1,334,581	44,486	1.5%
EMPLOYMENT	MECKLENBURG COUNTY	689,800	1,080,100	390,300	13,010	1.5%
EMPLOYMENT	% CAPTURE OF CONNECT AREA	52%	55%	60%		
EMPLOYMENT	CONNECT AREA	1,313,995	1,961,538	647,543	21,585	1.3%

Note: The CONNECT Area encompasses 14 counties in the greater Charlotte region. The CONNECT Area forecast has 2050 as an end year. The 2040 total is estimated by EPS using the rate of growth used to derive the 2050 total.

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Mecklenburg County Job & Household Growth Assumptions

Jobs (dark)
Households (light)

2001 - 2045

Between 2020 and 2040:
- **200,362** more jobs
- **114,473** more households

Year	Jobs	Households
2001-2005	9,582	46,813
2006-2010	14,747	36,398
2011-2015	101,381	40,530
2016-2020	79,715	45,431
2021-2025	38,678	23,980
2026-2030	52,227	29,247
2031-2035	52,228	29,770
2036-2040	57,229	31,476
2041-2045	57,230	31,477

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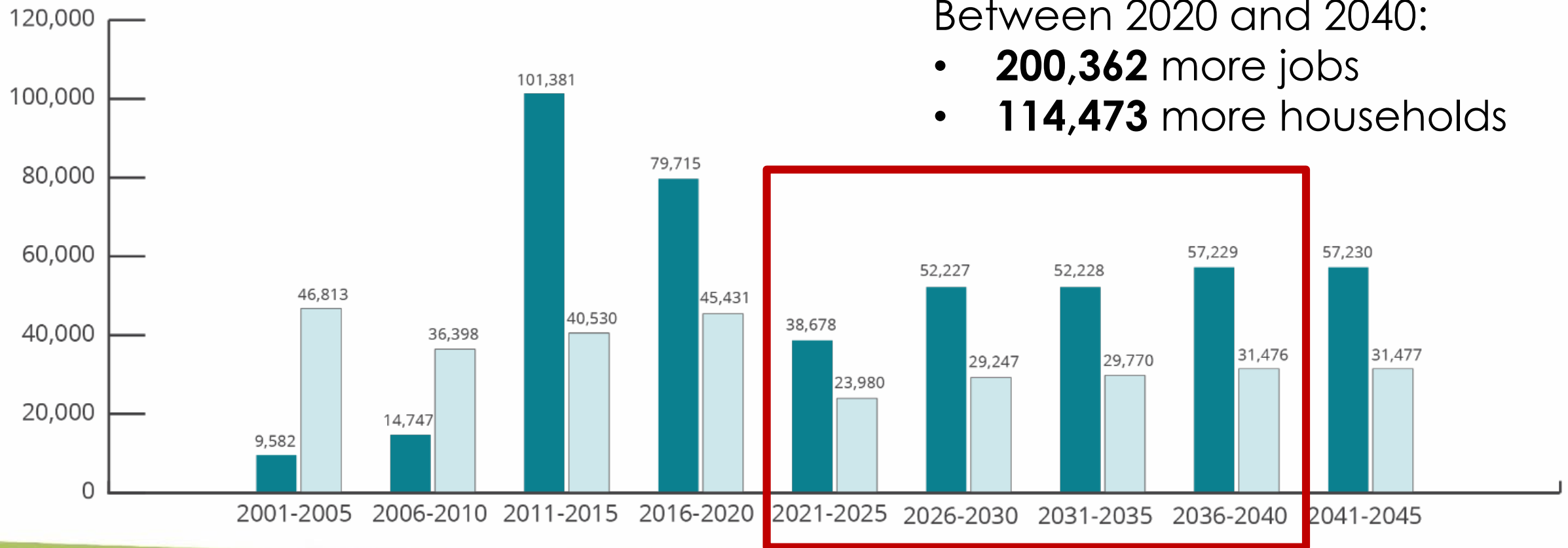
Growth Factors Report: Comparison to Peers

- Highest rate of job growth
- Highest rate of regional job capture
- With Austin, most diverse types of development
- Fewer "distressed" zip codes vulnerable to displacement

PEER CITY	WITHIN 2 MILES OF CENTER OF THE CITY	
	% OF CITYWIDE HOUSING UNITS (2018)	CAPTURE OF NEW CITYWIDE UNITS (2010-2018)
MINNEAPOLIS	36%	53%
SEATTLE	27%	45%
DENVER	23%	38%
ATLANTA	22%	35%
NASHVILLE	10%	30%
CHARLOTTE	9%	24%
AUSTIN	11%	19%
RALEIGH	11%	18%
PHOENIX	4%	6%

City Center vs Citywide Growth, Source: ESRI

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Growth Factors Report: Findings

- Strong growth, but unequal benefit
- Regional role is getting stronger
- Increasing diversity in race and foreign-born
- Affordability affecting residents and small businesses
- Support needed to spur start-ups
- Distribute growth opportunities and pressures
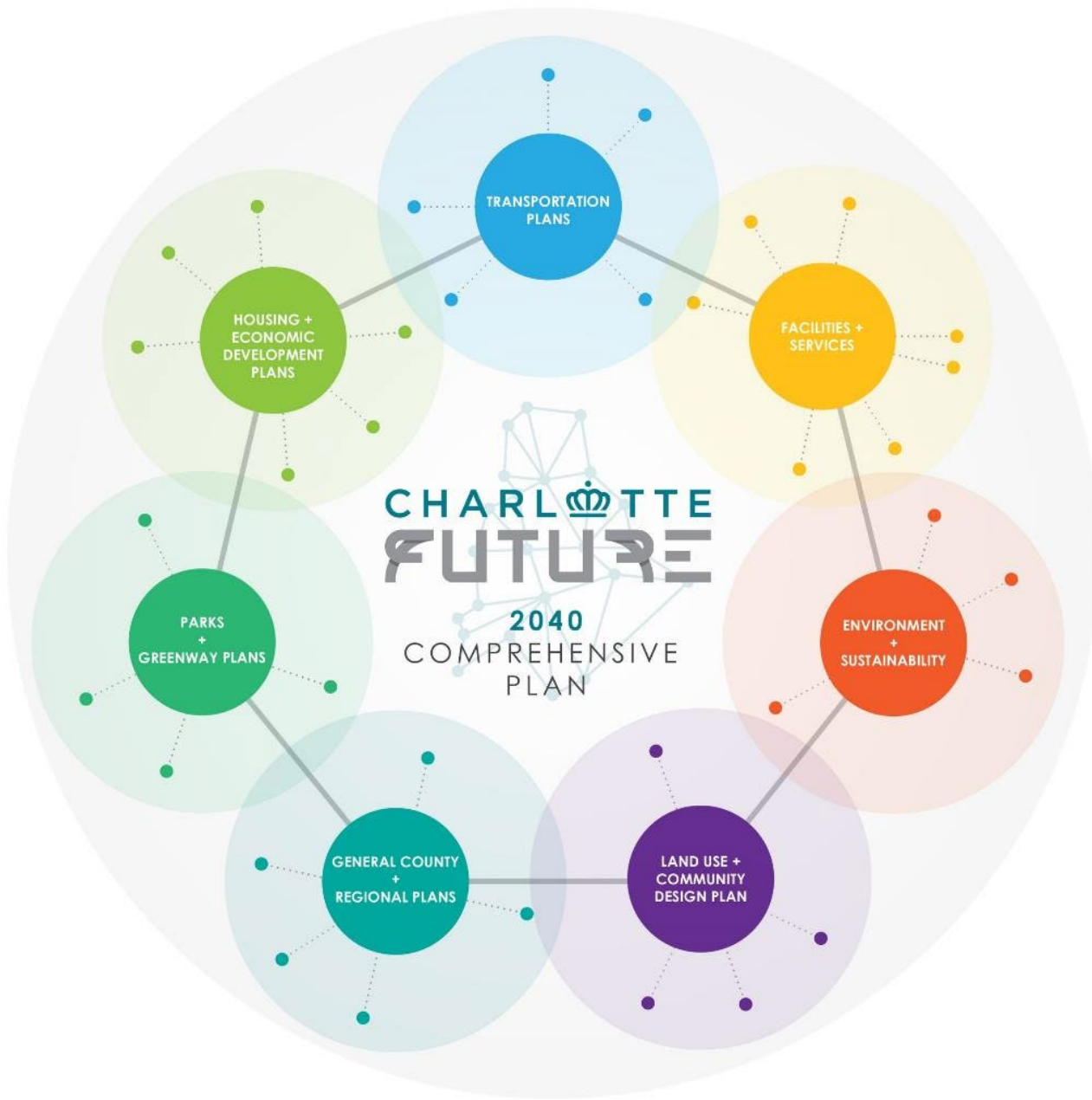
A Comprehensive Plan **guides our growth** to achieve the physical structure we want for Charlotte in 20 years.

A **shared vision** of our growth, development and capital investments

A shared vision paired with strong **policy**, strategic **regulation** and targeted **investment** in infrastructure.

Tools include the new Unified Development Ordinance (**UDO**) and public spending priorities.

Comprehensive Plan: Overarching Principles

AUTHENTIC AND EQUITABLE PARTICIPATION

INTERWOVEN EQUITY

INTEGRATED FRAMEWORK FOR GROWTH, DEVELOPMENT, AND COMMUNITY DESIGN

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Process Steps

Phase 1
Winter 2018 – Spring 2019

Phase 2
Summer – Fall 2019

Phase 3
Winter 2019 – Spring 2020

Phase 4 . . .
Summer 2020 – Spring 2021

Ongoing

Our History + Existing Conditions

Community Vision + Values

Preferred Scenario for Future Growth

Policies + Strategies

Review + Adoption

Implement + Monitor + Update

Asset and Gap Identification – Housing, Jobs, Amenities and Infrastructure

Set Overall Goals and Strategy for Charlotte Through 2040

Map the Types of Places to Retain and Create – Understand Costs and Trade-Offs

Draft Recommendations Create Places & Realize Vision

Test and Adjust the Plan to Ensure it Reflects the Charlotte Community

Complete draft UDO, **Guide** Public Investment, and **Measure** Success

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One size does not fit all!

Effective, meaningful participation

Removing barriers and make accessible

Integrated Inclusive Community Engagement

Equitable Engagement Strategy

Individuals with Limited Mobility

Youth

Busy Families

Communities of Color

Immigrant Community

To start our process, we asked over 250 people to tell us who is not at the table and how do we best engage them. Seven guidelines emerged for our process.

Make information accessible.

Make meetings convenient.

Work as partners.

Provide choices for engagement.

Make it relevant.

Make it useful.

Focus on action & tangible solutions.

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Preliminary Elements

Vision + Values

Inclusive City	Livable + Connected City	Healthy + Sustainable City	Prosperous + Innovative City	Regional City
• Affordability • Healthy + Safety • Education • Historic Resources	• Land Use + Design (Place Types) • Transportation • Public Facilities + Services	• Environmental Quality • Energy + Sustainability • Food Systems	• Diverse + Resilient Economy • Jobs & Access	• Center City • Activity Centers • Regionalism
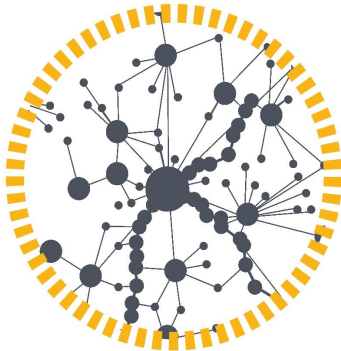
Implementation + Monitoring

Preliminary Elements Address Hot Topics Such As:

Vision + Values

Inclusive City	Livable + Connected City	Healthy + Sustainable City	Prosperous + Innovative City	Regional City
Displacement	Land Use & Design	Food Deserts & Food Systems	Jobs & Training Programs	CLT Airport
Affordable Housing	Parks & "Public" Space	Tree Canopy Preservation	Business Friendly Community	Regional Bus & Light Rail Connections
$50 million Housing Bonds	Active Transportation	Strategic Energy Action Plan	Vision Zero	Passenger Rail Hub
	Congestion & Transportation		Opportunity Zones	Highway Linkages

Implementation + Monitoring

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Comprehensively incorporating plans such as...

- 55+ Area/District Vision Plans

- Centers, Corridors and Wedges Growth Framework

- General Development Policies

- Transportation Action Plan/Vision Zero Action Plan

- 2030 Transit System Plan & Updates

- Comprehensive Transportation Plan (CRTPO)

- 2045 Metropolitan Transportation Plan

- Regional Freight Mobility Plan

- Regional Transit Plan

- Charlotte Water System Master Plan 2050

- Greenway Master Plan

- Mecklenburg County Park & Recreation 10-Year Master Plan & Updates

- County Library & School Facilities Strategies

- Housing Charlotte Framework

- Strategic Energy Action Plan (SEAP)

- CONNECT Our Future

- Charlotte WALKS

- Charlotte BIKES

- Airport Area Strategic Development Plan

- Urban Forestry Master Plan

- Mecklenburg Livable Communities Plan & Updates

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CHARLOTTE FUTURE | 2040 COMPREHENSIVE PLAN

Policy Audit Report

January 2019

CHARLOTTE
PLANNING, DESIGN
& DEVELOPMENT
Prepared for Charlotte Planning, Design + Development by MIG, Inc.
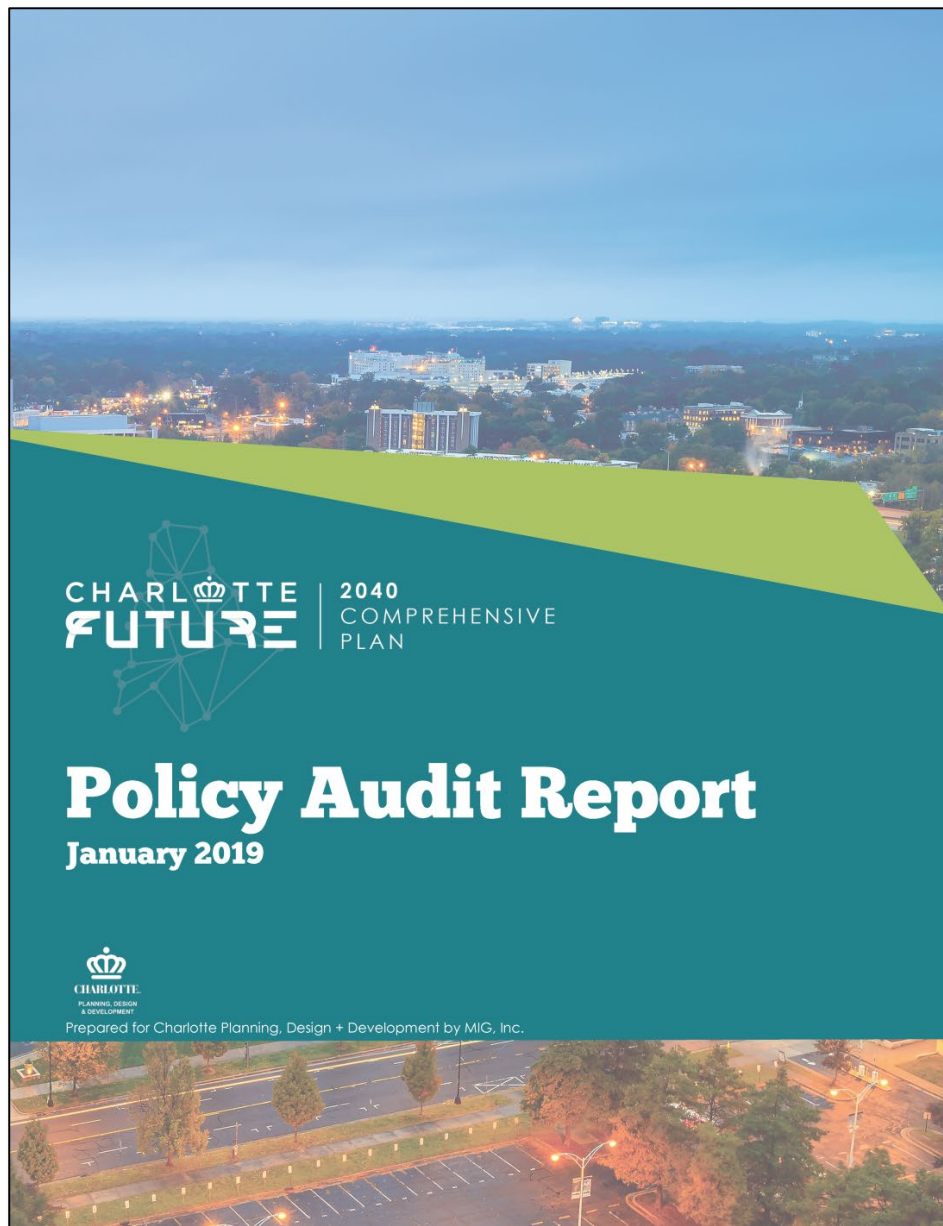
Policy Audit Objectives:

- **Synthesize community-wide policies** from numerous city and county plans

- **Rank policy maturity and identify policy gaps** for exploration during Charlotte Future process

- **Capture staff's input on policy effectiveness** and relationship to implementation (for future reference)

Organizational Framework
- Community Values & Vision
- Livable & Connected
- Inclusive
- Healthy & Sustainable
- Prosperous & Innovative
- Regional

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Policy Seeds Planted

- Jobs-Housing Balance
- Curb Lane Management
- Autonomous Vehicles
- Anti-Displacement
- Environmental Justice
- Climate Adaption

Policy Seeds Taken Root

- Traffic Calming and Complete Streets
- Historic Preservation
- Redevelopment, Infill and Neighborhood Protection
- Complete Neighborhoods
- Housing Affordability
- Growth Patterns

Well-Established Policies

- Vision and Values
- Future Land Use and Community Character
- Development and Infrastructure
- Active Living Environment and Public Spaces
- Green Building and Sustainable Site Design
- Renewable Energy and Air Quality

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Key Findings:

- Need for **overarching vision framework** to connect area plans to community-wide policy guidance

- Many neighborhood / area plan policies should be **considered for community- wide application**

- Development **policies in the neighborhood/area plans are very prescriptive**; place types and plan are opportunity to identify needed UDO changes to put regulatory guidance in the right place

- Community has an **interest in advancing sustainability objectives**

Impact of Past Growth Policies
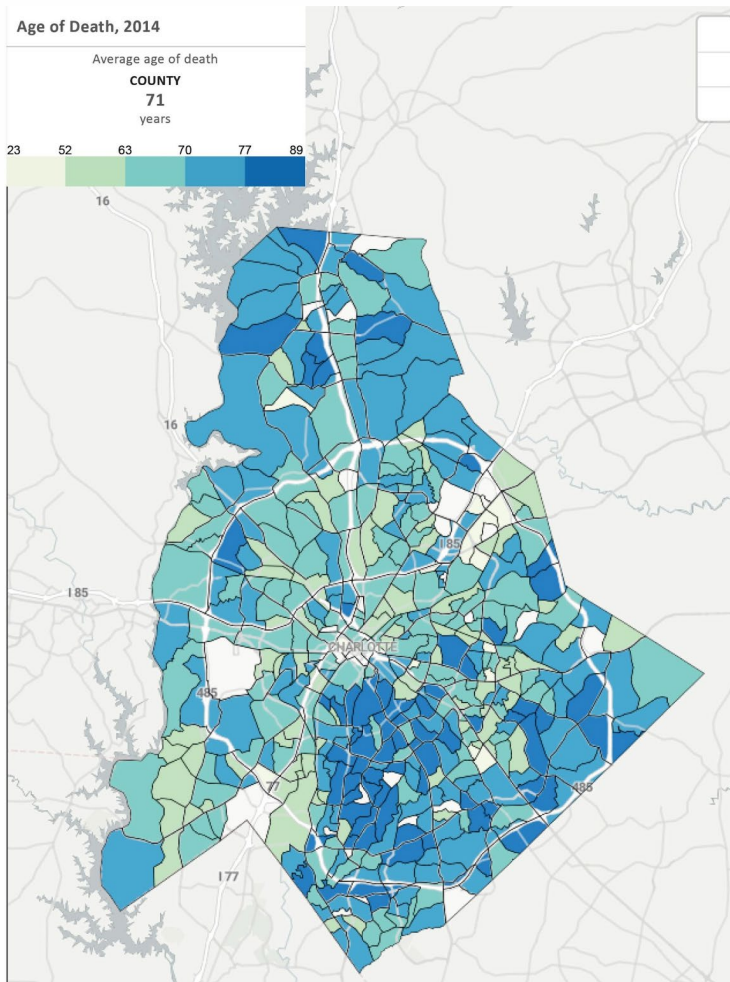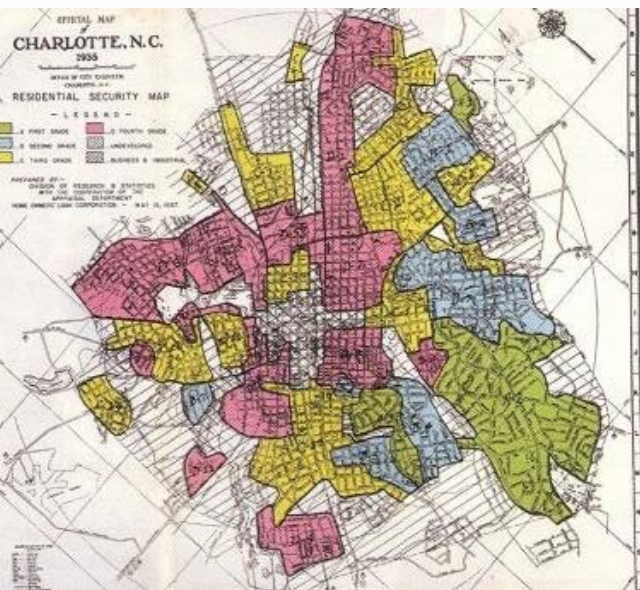
Source: Charlotte/Mecklenburg Quality of Life Explorer, UNC Charlotte
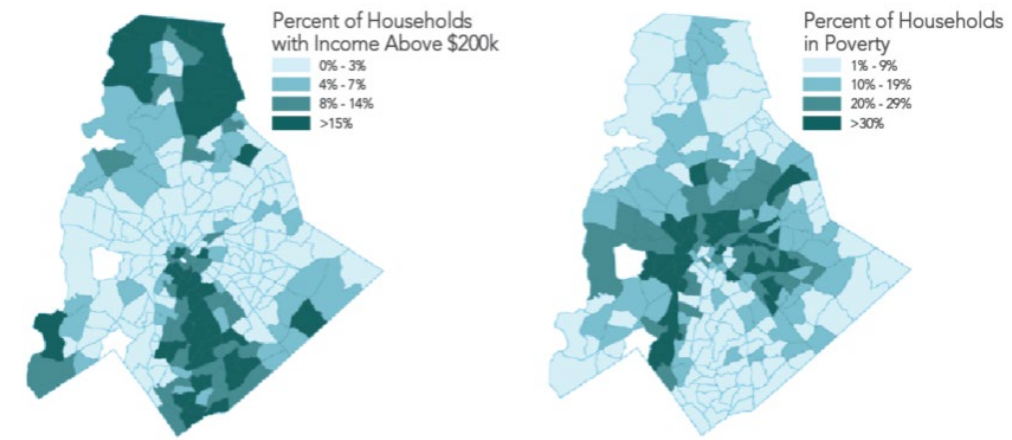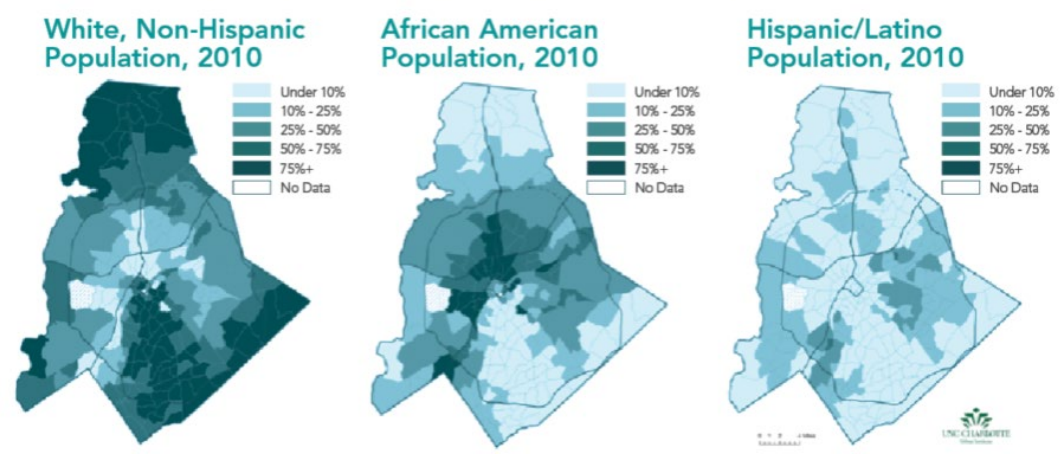
Equitable Development

Equality

Equity

Being **fair** about investments in our City

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Equity Atlas

COMPARISON OF MEDIAN HOUSEHOLD INCOME, 2016

Helps to identify economically-disadvantaged communities with limited financial resources.

2016
— City of Charlotte Boundary
Lowest 20%
20% – 40%
40% – 60%
60% – 80%
Highest 20%
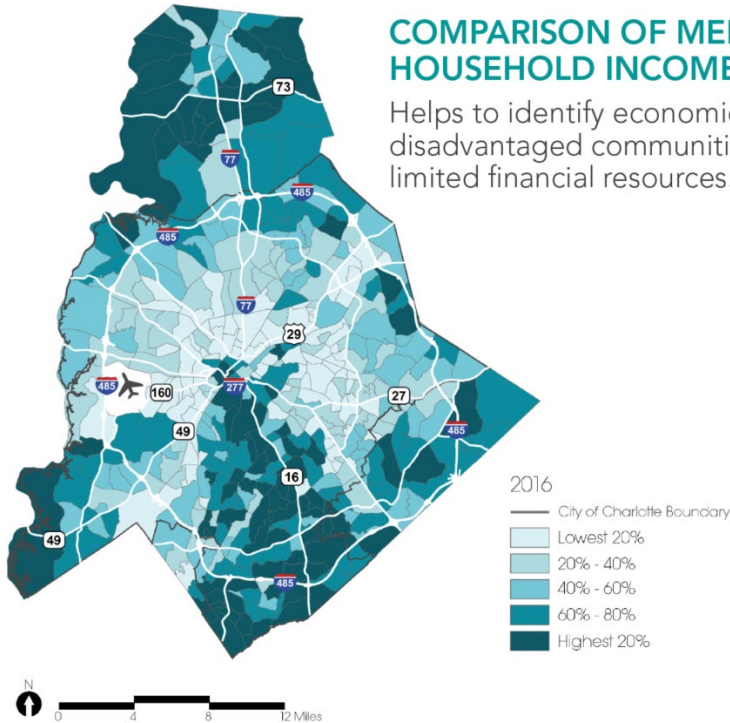
RACE, 2016

Identifies the percentage of Communities of Color and relative diversity (or lack thereof)

Percent White Population
— City of Charlotte Boundary
0% – 17%
17% – 36%
36% – 61%
61% – 83%
83% – 100%
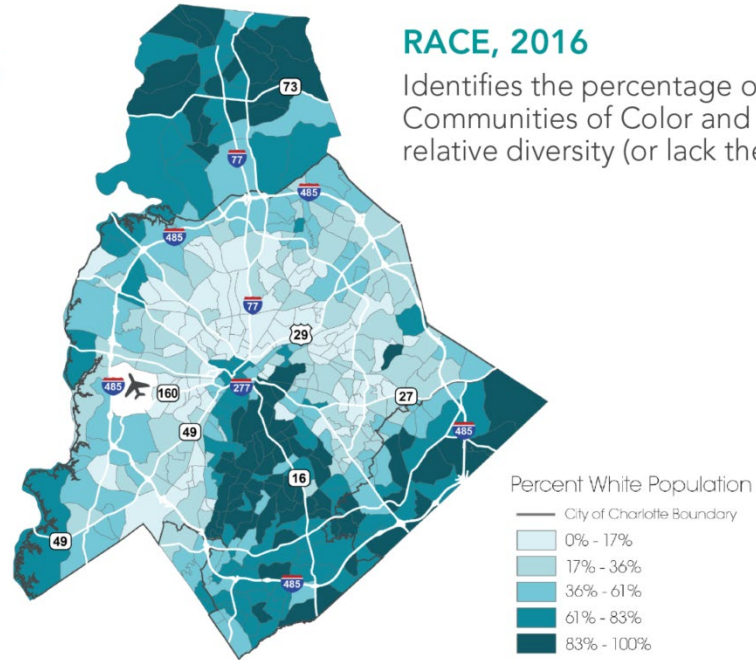
VOTER PARTICIPATION, 2016

Is an indicator of trust in government and agency - believing one's voice matters.

Percentage of registered voters that voted
— City of Charlotte Boundary
41% – 66%
66% – 72%
72% – 77%
77% – 82%
82% – 90%
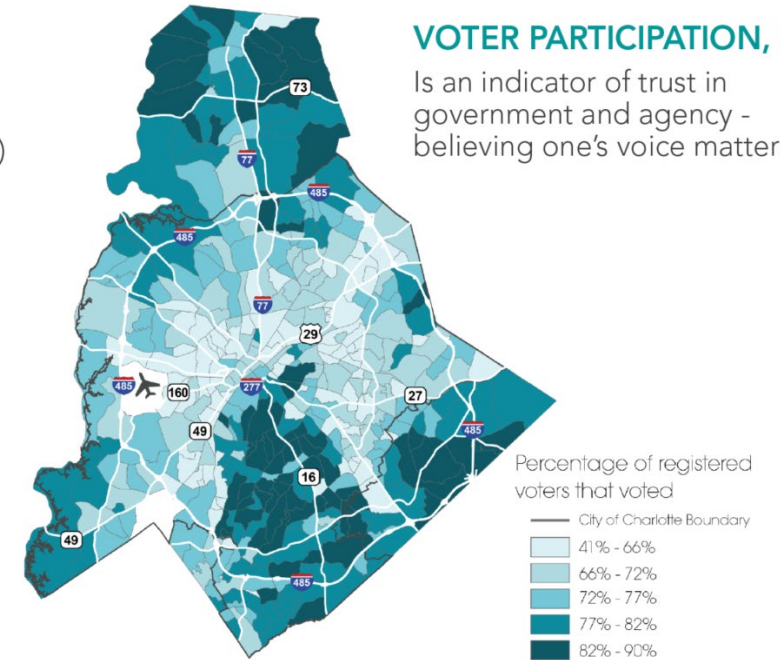
Equity Atlas

- **Spatial pattern**, derived from the Household Income, Race, and Voter Participation Rate maps (previous slide)

- Described as an **"arc" of communities of color and concentrated areas of poverty**

- Contrasting "wedge" from Uptown and the Center City down contains NPAs with higher incomes, percentage of White residents, and voter participation

EQUITY INDICATORS DISTRIBUTION

Arc Pattern
Neighborhood Planning Areas (NPAs)
City of Charlotte Boundary

N

0   4   8   12 Miles
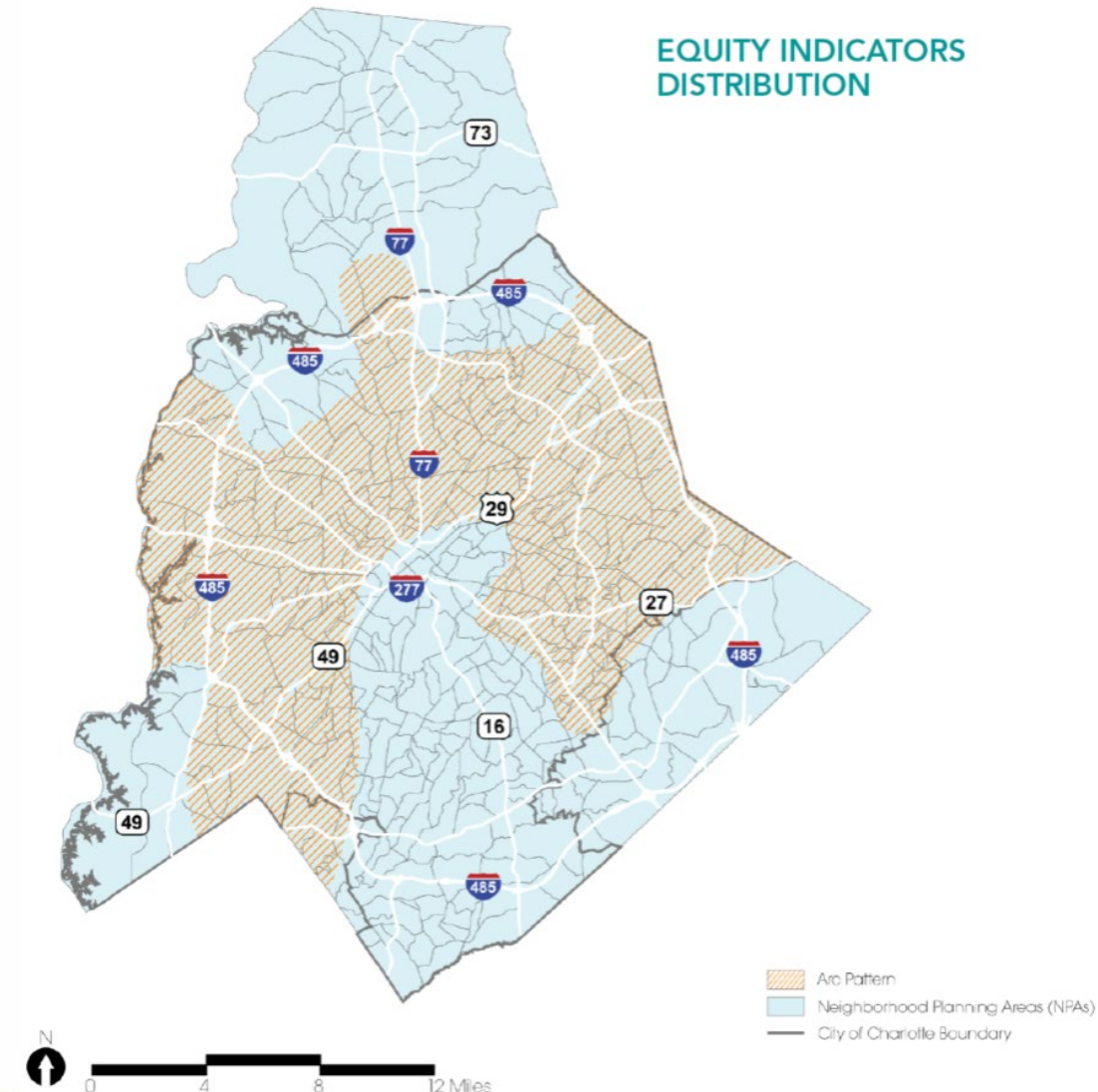
Equity Atlas

The Comprehensive Plan process should attempt to identify ways to:

1. Meet neighborhood needs and
2. Improve access to existing amenities

THE ARC

$49,705 → $12,612
AVG. INCOME   BELOW CITY AVERAGE

199,547 → 45.4% OF
HOUSEHOLDS   CITY TOTAL

296,219 → 44.3%
EMPLOYED   OF TOTAL
RESIDENTS   WORKFORCE

511,064 → 47.9% OF
RESIDENTS   CITY TOTAL

+9,350 → 52.2%
RESIDENTS   OF CITY
PER YEAR   GROWTH

32.7% → 11.2% BELOW
RESIDENTS   CITY AVERAGE
ARE WHITE

245 SQ. → 45% OF
MILES   COUNTY TOTAL
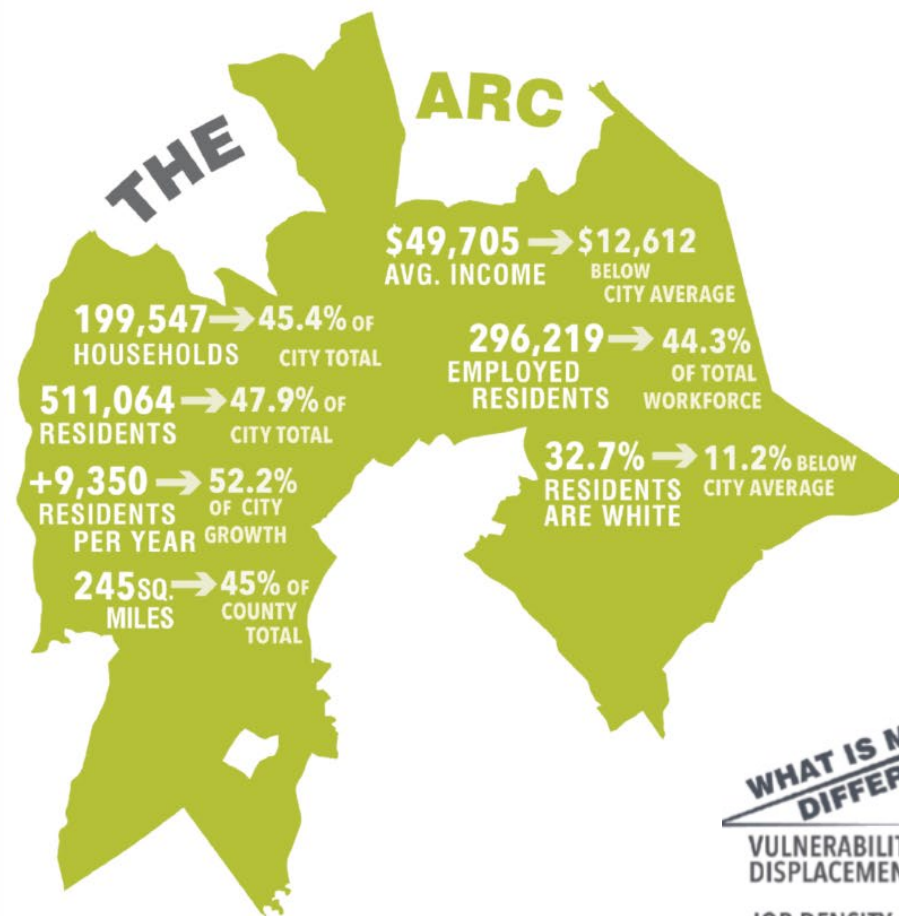
WHAT IS MOST DIFFERENT?

VULNERABILITY TO DISPLACEMENT

JOB DENSITY

JOB-SKILL MATCH

RESIDENTIAL RENOVATION

SIZE OF COMMERCIAL

THE WEDGE

152,880 → 34.8%
HOUSEHOLDS   OF CITY TOTAL

334,040 → 31.3% OF
RESIDENTS   CITY TOTAL

+4,371 → 24.4% OF
RESIDENTS   CITY GROWTH
PER YEAR

$78,226 → $15,909 ABOVE
AVG. INCOME   CITY AVERAGE

283,962 → 42.5%
EMPLOYED   OF TOTAL
RESIDENTS   WORKFORCE

63.3% → 19.5%
RESIDENTS   ABOVE
ARE WHITE   CITY AVERAGE

106 → 19% OF COUNTY TOTAL
SQ. MILES
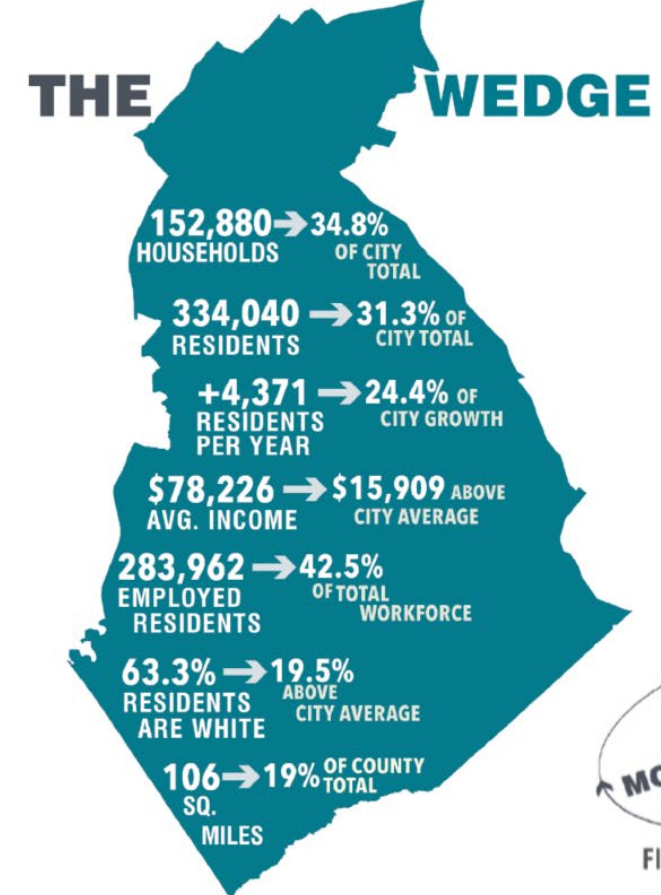
WHAT IS MOST SIMILIAR?

FIRE RESPONSE

STREET CONNECTIVITY

PROXIMITY TO TRANSIT

SIDEWALK AVAILABILITY

PROXIMITY TO OUTDOOR RECREATION
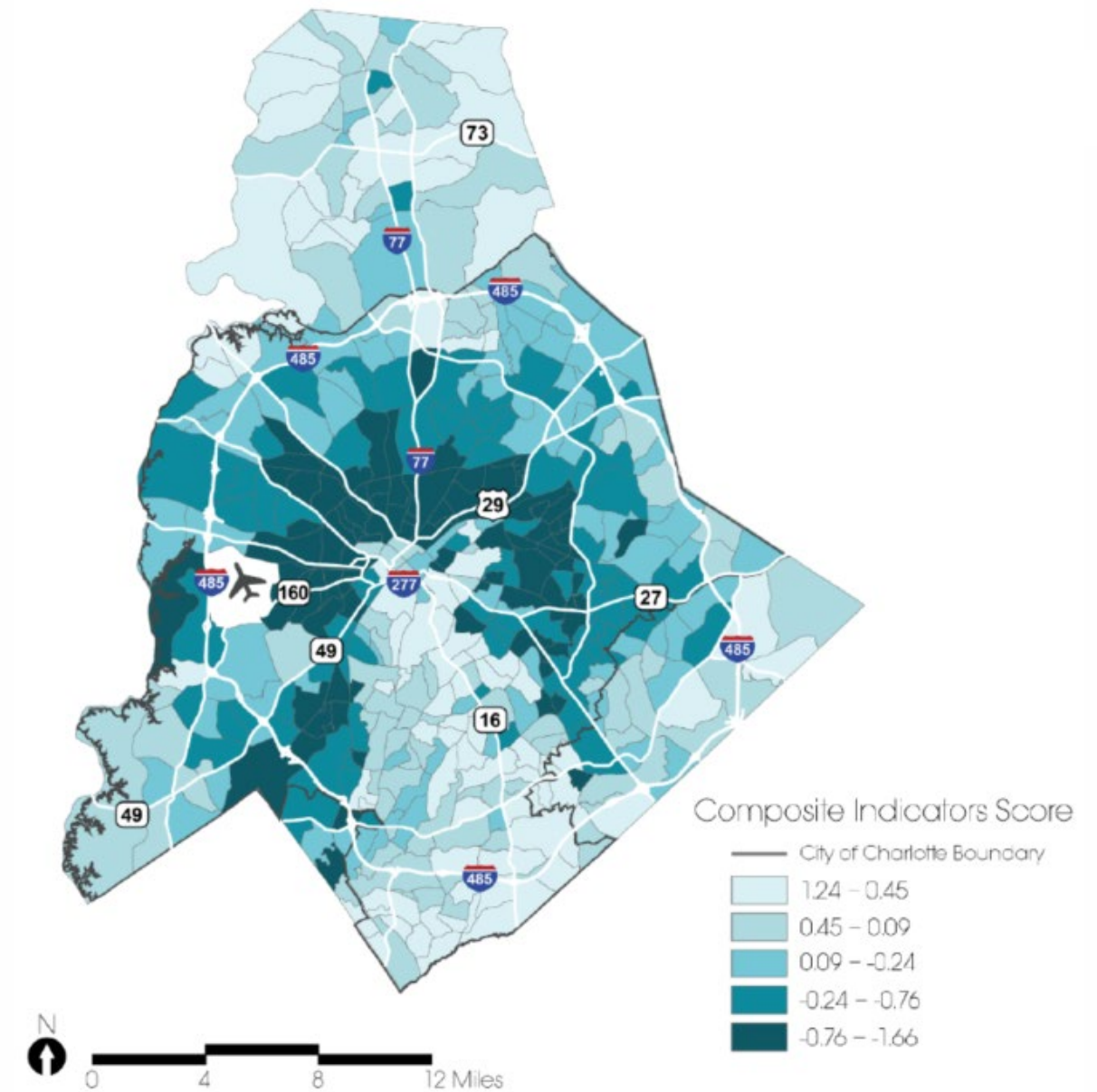
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Vulnerability to Displacement Index

Composite Indicators Score

— City of Charlotte Boundary

1.24 – 0.45
0.45 – 0.09
0.09 – -0.24
-0.24 – -0.76
-0.76 – -1.66

N

0   4   8   12 Miles

Note: Negative numbers indicate a higher probability of displacement, while positive numbers suggest a low probability.

Complete Neighborhoods

- A complete neighborhood provides residents safe and convenient access to a variety of housing, jobs, goods, services, and other essentials.
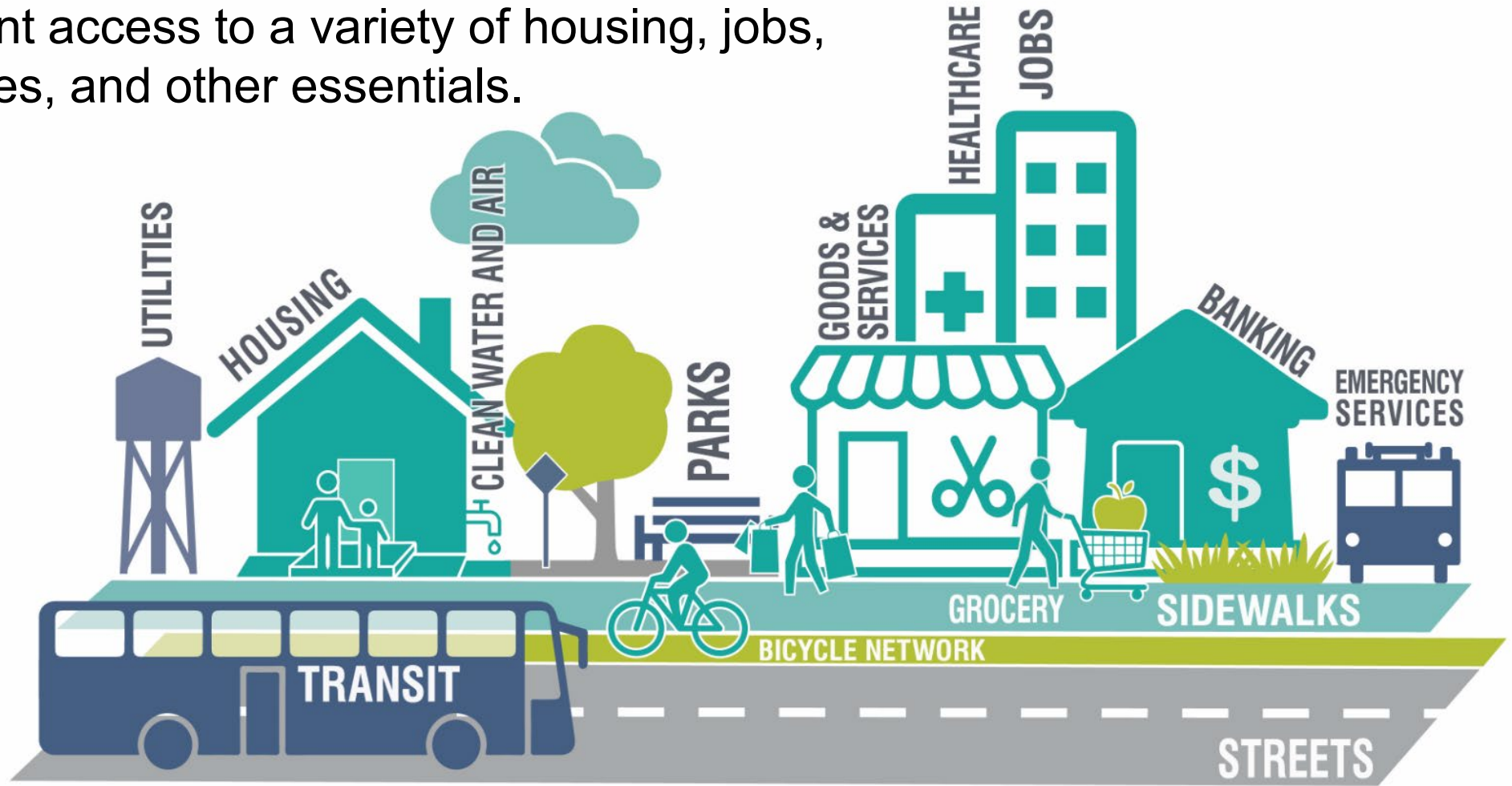
Complete Neighborhoods

Full-service, chain grocery store

Pharmacy

Outdoor public recreation area

Licenced early care and education program for children birth to age 5

Transit stop

% of the 357,977 HOUSING UNITS IN CHARLOTTE (2017)

73%

67%

WITHIN 1/2 MILE OF THESE BASIC NEIGHBORHOOD AMENITIES

31%

32%

54 %

Our Community Vision + Values

"Charlotte is America's Queen City, opening her arms to a **diverse** and **inclusive** community of residents, businesses, and visitors alike; a **safe** family-oriented city where people **work together** to help **everyone thrive.**"

Source: *January 2018, City Council Retreat*

Vision Themes to Build On

- Existing plans
- Prior Engagement
- Consultant Reports
- Resident Survey

→

- Diverse and Inclusive Community
- Equitable Access and Development
- Strong Neighborhoods
- Thriving Economy
- Affordability and Housing Choice
- Transportation Choices
- Distinctive Character
- Walkable Neighborhoods
- Build Community Capital
- Inviting Spaces
- Outdoor Recreation
- Healthy Environment and Tree Canopy
- Combat Displacement

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PreliminaryVision Themes

Diverse and Inclusive Community

Inviting Spaces

Equitable Access and Development

Build Community Capital

Strong Neighborhoods

Healthy Environment and
Tree Canopy

Thriving Economy

Affordability and Housing Choice

Walkable Neighborhoods

Transportation Choices

Combat Displacement

Distinctive Character

Outdoor Recreation

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Current Directions

Current Directions

Jobs Growth

Housing Growth & Displacement

Equitable Development

Traffic & Transportation Options

"Public" Spaces

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Jobs Growth

Job Density (2015)

Job Density, 2015

Jobs per Acre

— City of Charlotte Boundary
0 Jobs - 2.7 Jobs
2.7 Jobs - 9 Jobs
9 Jobs - 22 Jobs
22 Jobs - 40 Jobs
40 Jobs - 142.3 Jobs

N

0   4   8   12 Miles

Job-Skills Match

Job-Skills Match

Jobs Per Qualified Candidate

— City of Charlotte Boundary
< 1 Job/ 4 People
< 1 Job/ 2 People
< 1 Job/ Person
< 2 Jobs/ Person
> 2 Jobs/ Person

N

0   4   8   12 Miles
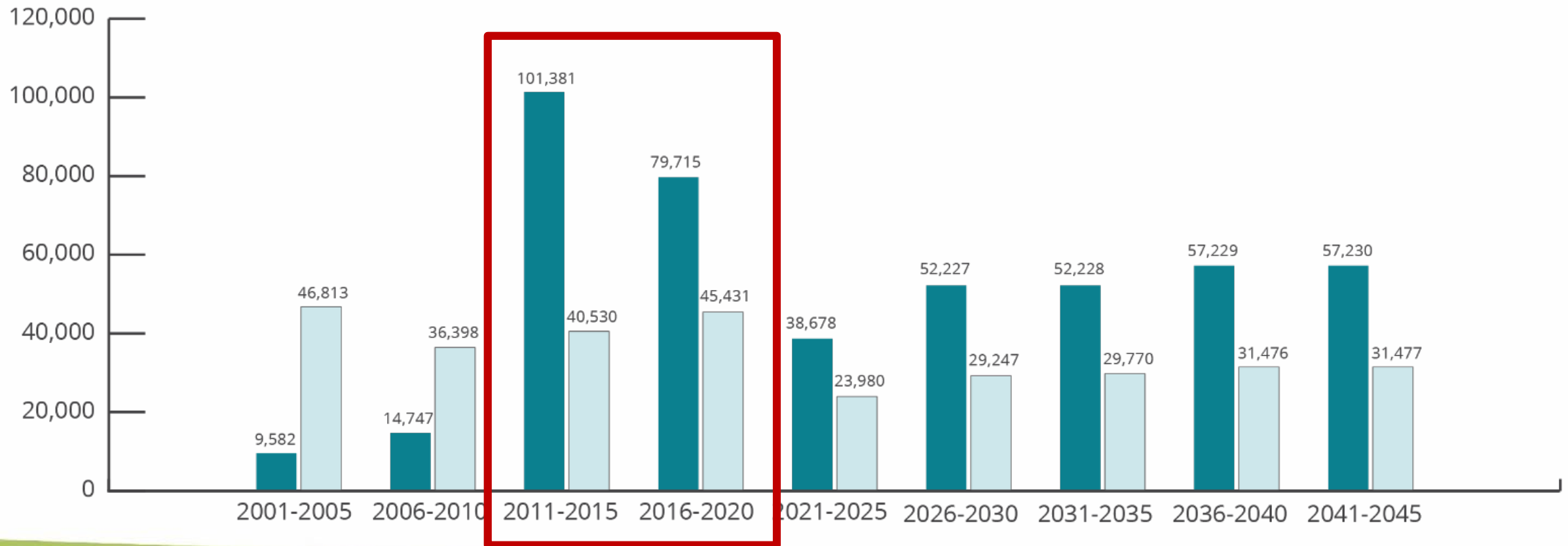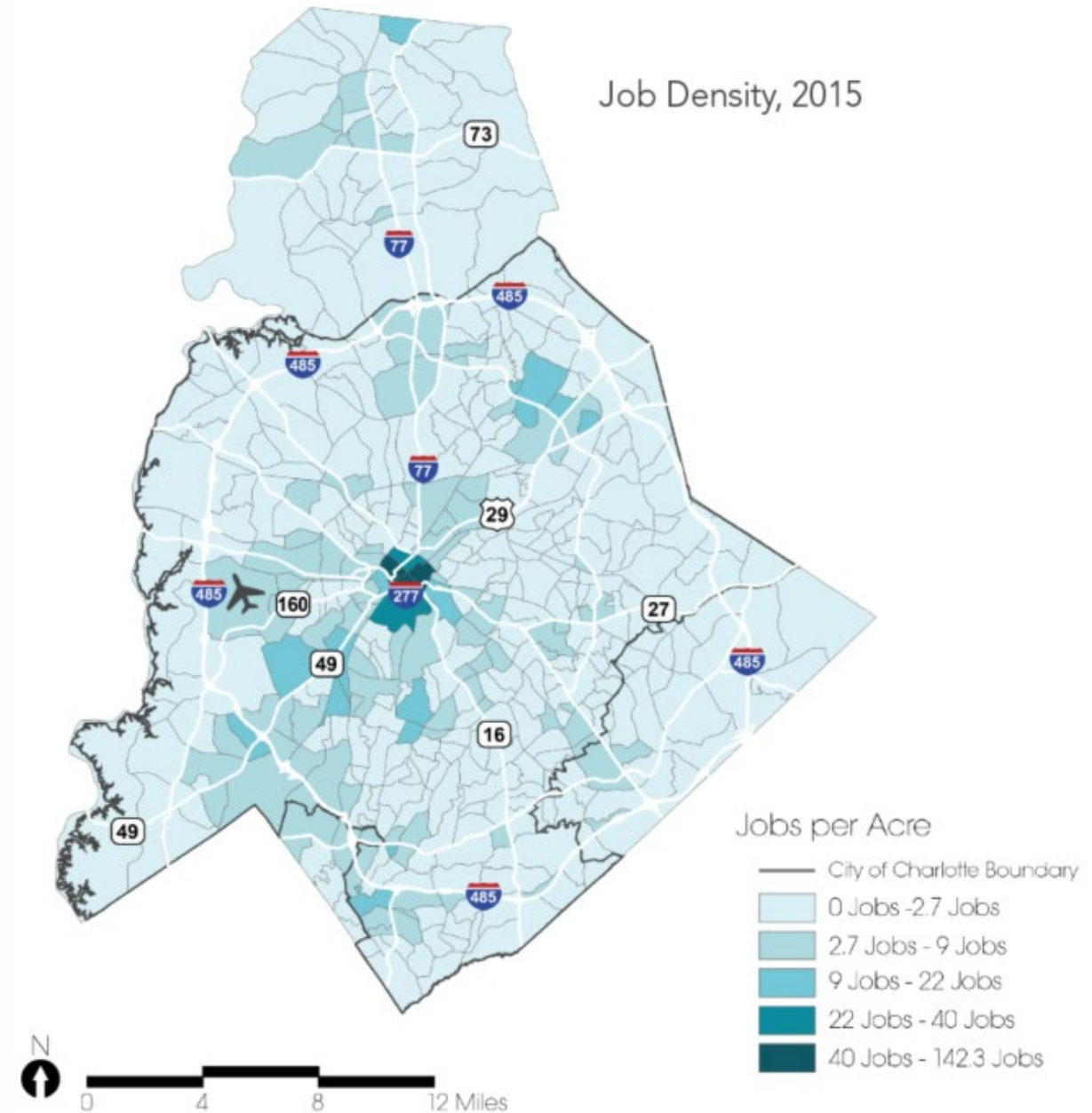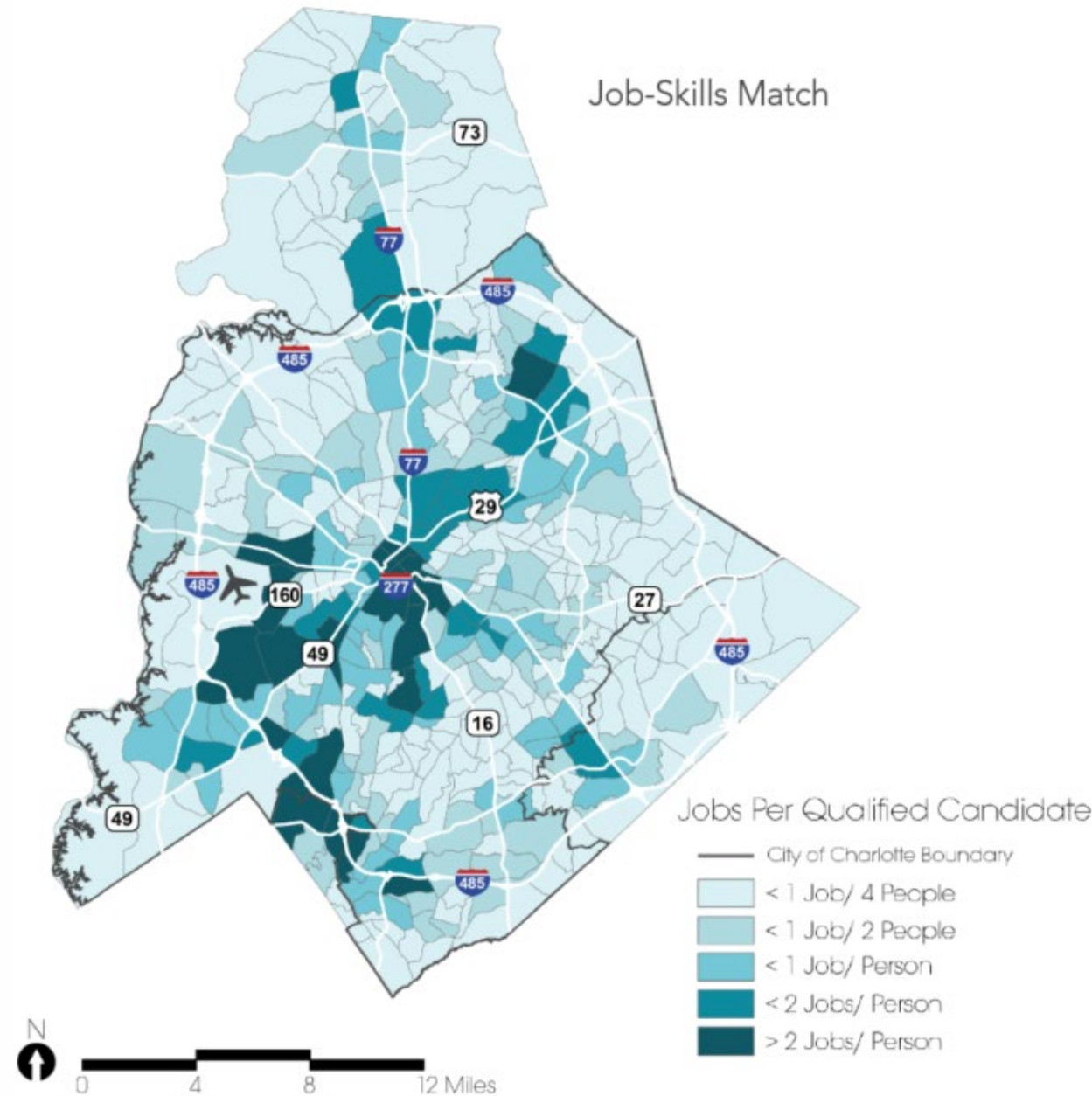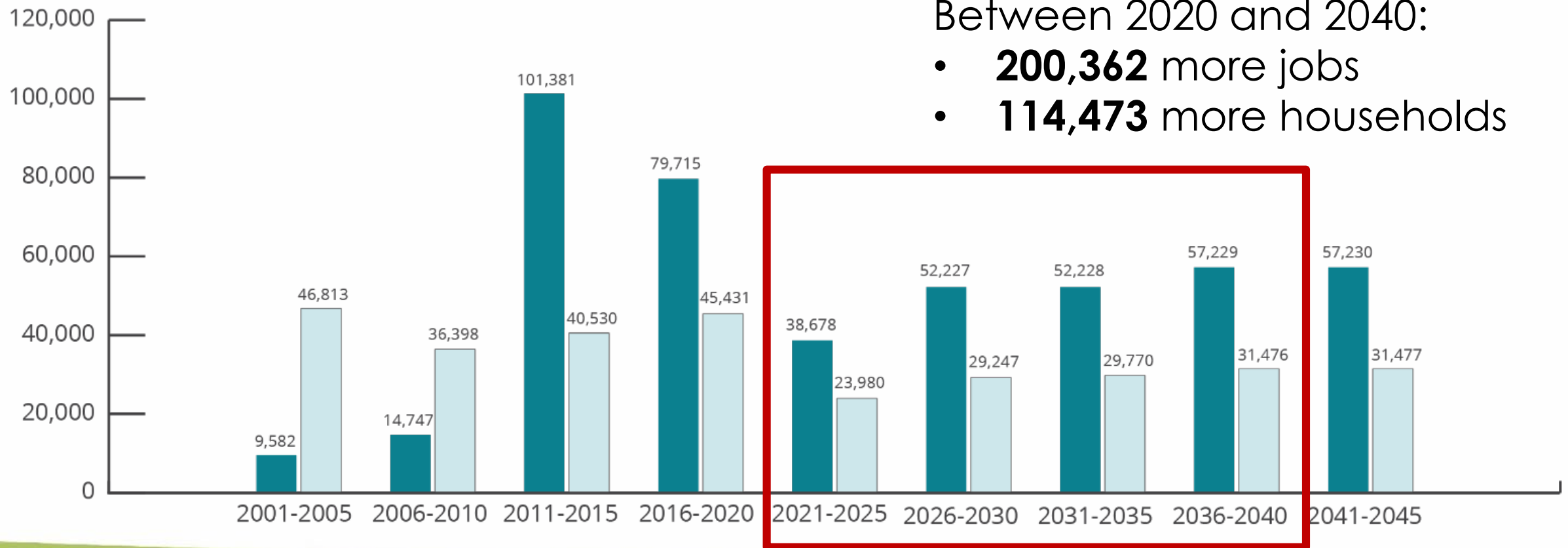
Housing Growth & Displacement

For-Sale Residential Trends

Townhouse development has shifted from a suburban alternative to an **in-town lifestyle product.**

People are moving away from single-family suburban neighborhoods and more towards **intown and Activity Centers**. These areas have high detached home prices, causing people to choose **attached residential** products as a price alternative.

Single family detached **home development has slowed** dramatically. In the 2000s detached single family homes accounted for 25% of the residential product being developed, today these homes only account for 14% of residential products being built.

By 2040…

Attached for-sale will continue gaining popularity, with around 500-600 new units/year

Single family becomes more challenging, with around 1,500 new units/year

For-Sale Residential Trends

Rental apartments account for more **than half the units added** in the Charlotte sphere since 2012.
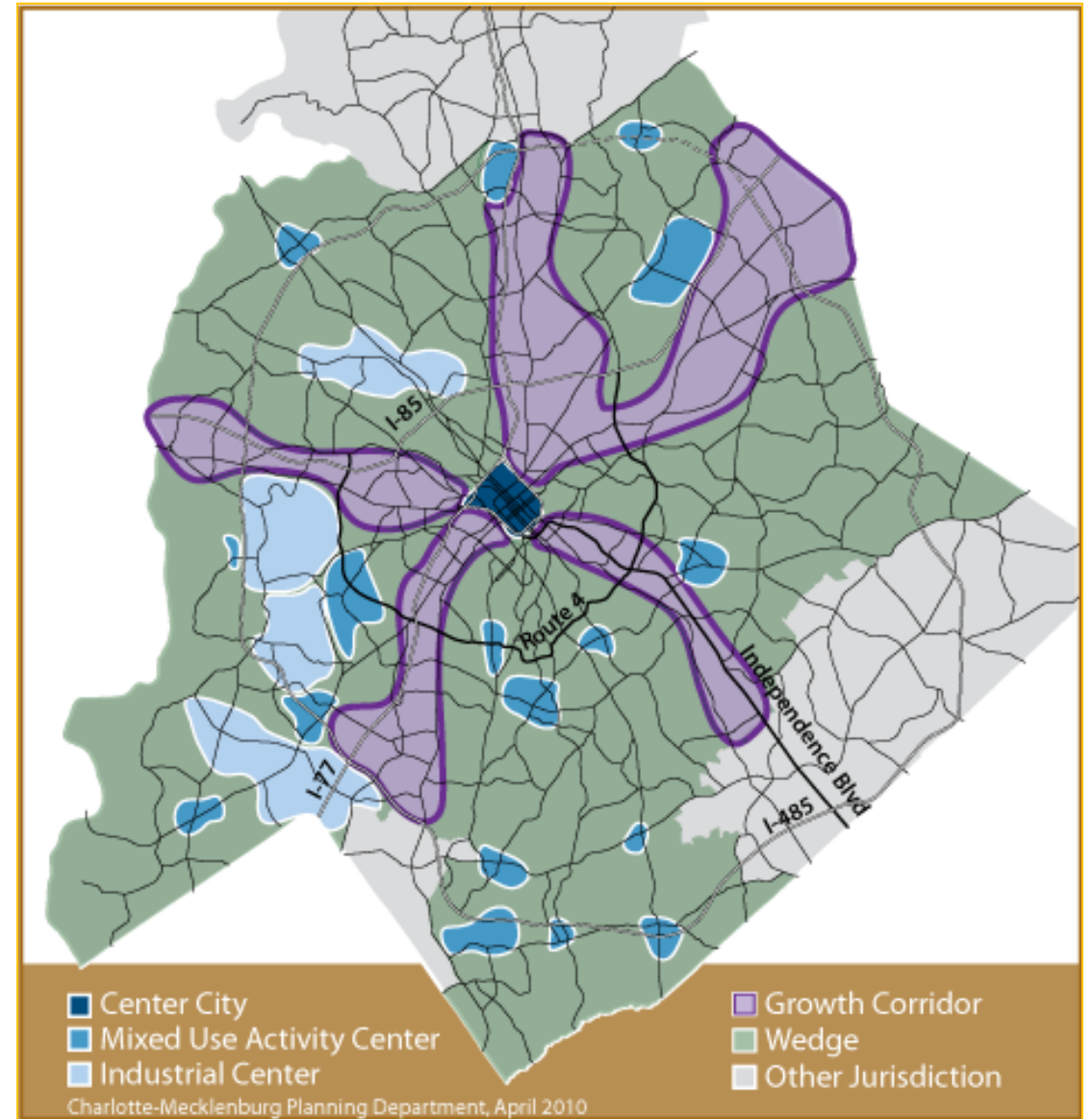
The share of apartments built in current or future transit station areas (not including street car or center city) is up from 10% in 2001-2005 to more than 40%, indicating the City's **support of transit**.
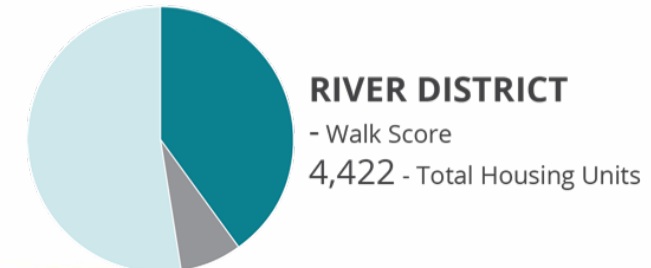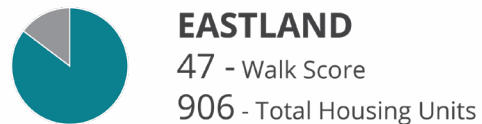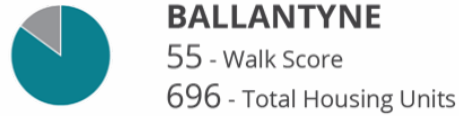
Many suburban neighborhoods built between 1960 and 1980 lack a sense of place and walkability. These neighborhoods will need **value creation** (investments in parks, greenways, new schools, and policies encouraging / facilitating redevelopment) before handling higher density.
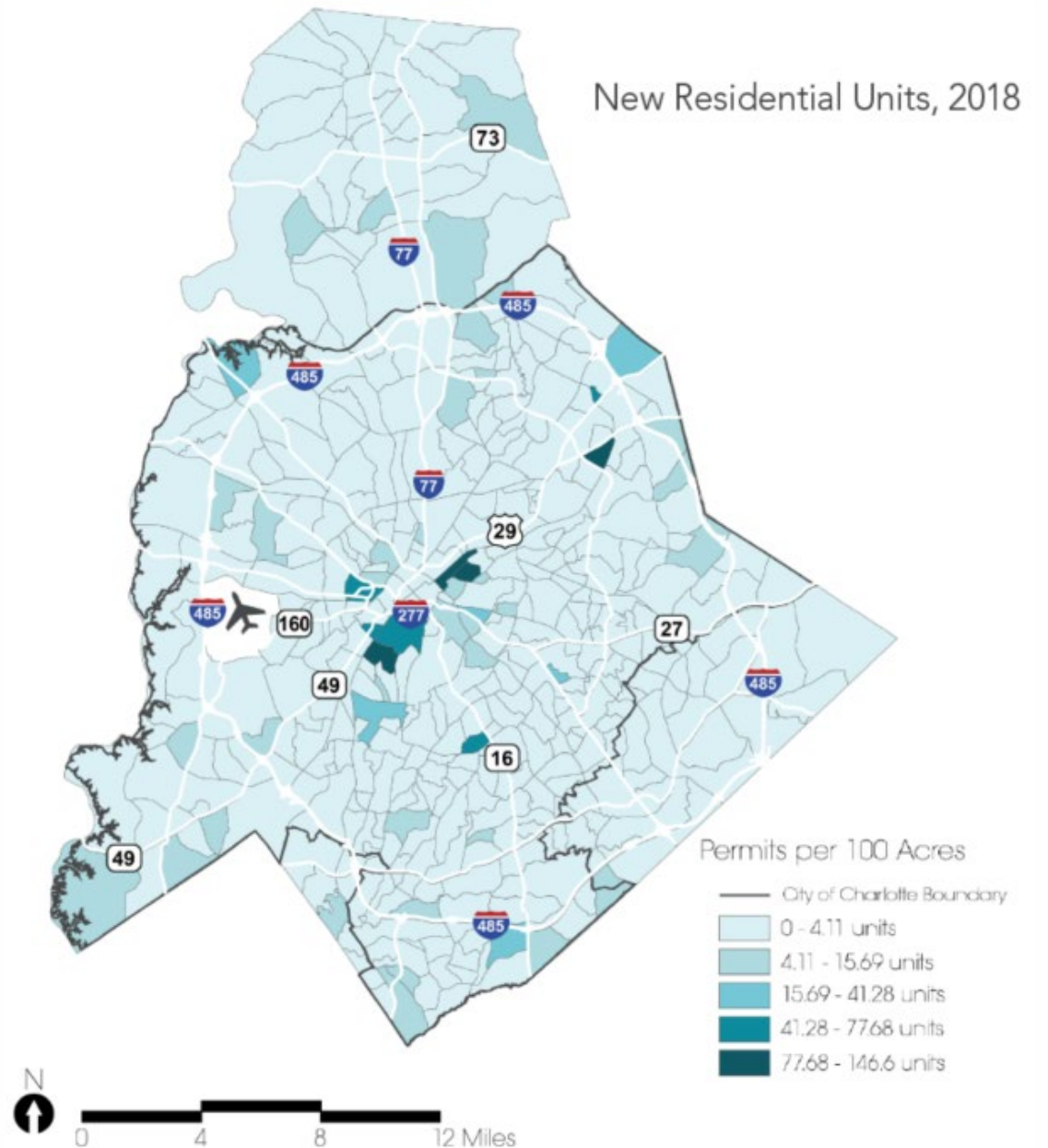
By 2040…

Rental apartment development will remain very high, at 50% of residential demand or 2,400 units/year

Wedges, Corridors, Activity Centers

Center City
Mixed Use Activity Center
Industrial Center
Growth Corridor
Wedge
Other Jurisdiction

Charlotte-Mecklenburg Planning Department, April 2010

Residential Projected Growth (units)

Sample of Activity Centers (2016 – 2045)

Legend:
- Rental Apartments
- Townhouse / Condo
- Single-Family Detached

BALLANTYNE
55 - Walk Score
696 - Total Housing Units

ARBORETUM
53 - Walk Score
222 - Total Housing Units

WHITEHALL
47 - Walk Score
2,863 - Total Housing Units

CENTER CITY
94 - Walk Score
10,204 - Total Housing Units

PROSPERITY
47 - Walk Score
1,010 - Total Housing Units

PROVIDENCE / I - 485
48 - Walk Score
1,208 - Total Housing Units

COLISEUM
11 - Walk Score
1754 - Total Housing Units

BROOKSHIRE / I-285
40 - Walk Score
882 - Total Housing Units

UNIVERSITY RES. PARK
28 - Walk Score
2,023 - Total Housing Units

CARMEL COMMONS
66 - Walk Score
757 - Total Housing Units

RIVERGATE
62 - Walk Score
822 - Total Housing Units

NORTHLAKE
49 - Walk Score
2,611 - Total Housing Units

EASTLAND
47 - Walk Score
906 - Total Housing Units

STONECREST
60 - Walk Score
156 - Total Housing Units

RIVER DISTRICT
- Walk Score
4,422 - Total Housing Units

New Residential Construction

New Residential Units, 2018

Permits per 100 Acres

— City of Charlotte Boundary
- 0 - 4.11 units
- 4.11 - 15.69 units
- 15.69 - 41.28 units
- 41.28 - 77.68 units
- 77.68 - 146.6 units

N

0   4   8   12 Miles

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Center City Investment and Growth
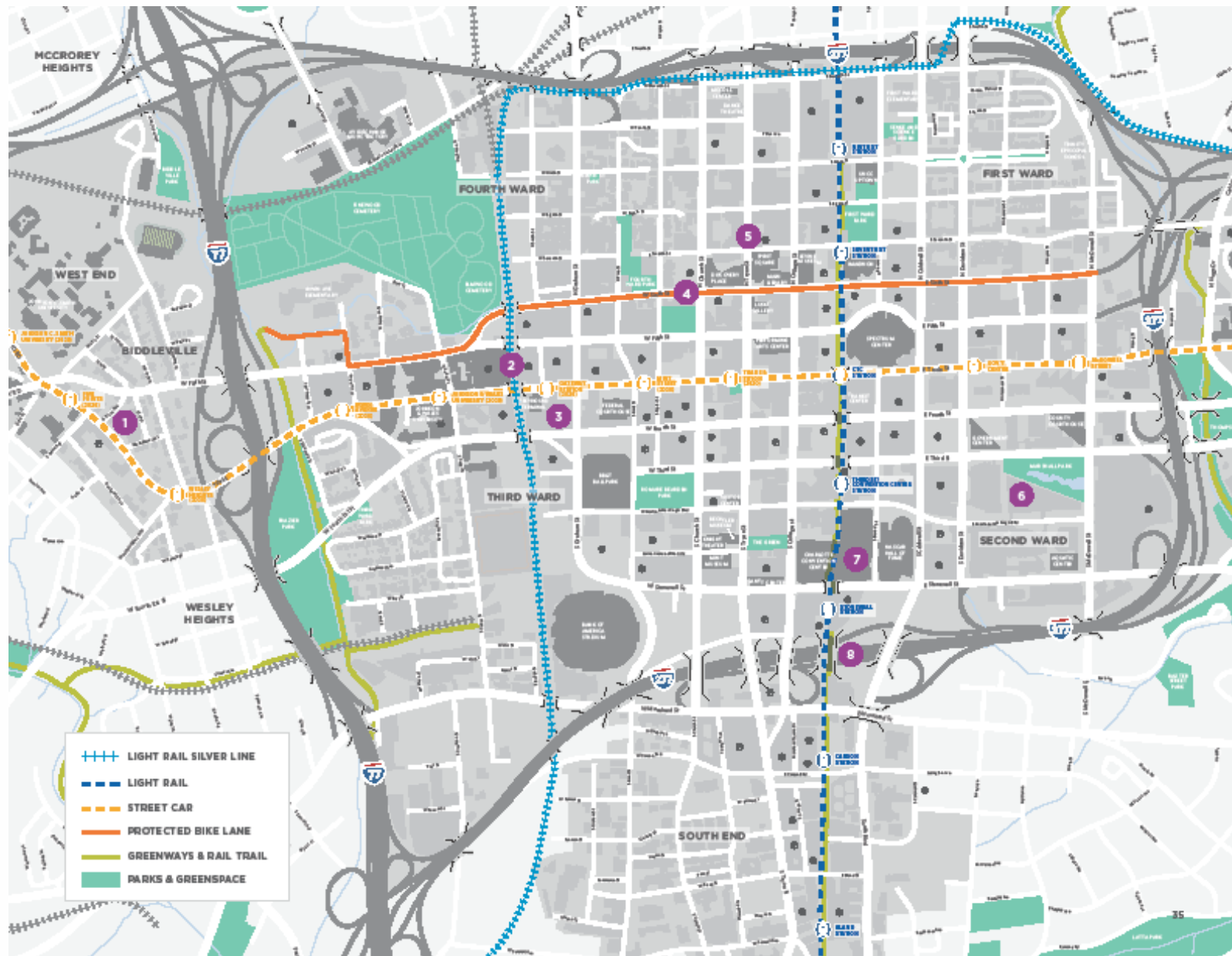
Changes in Housing Costs and Incomes
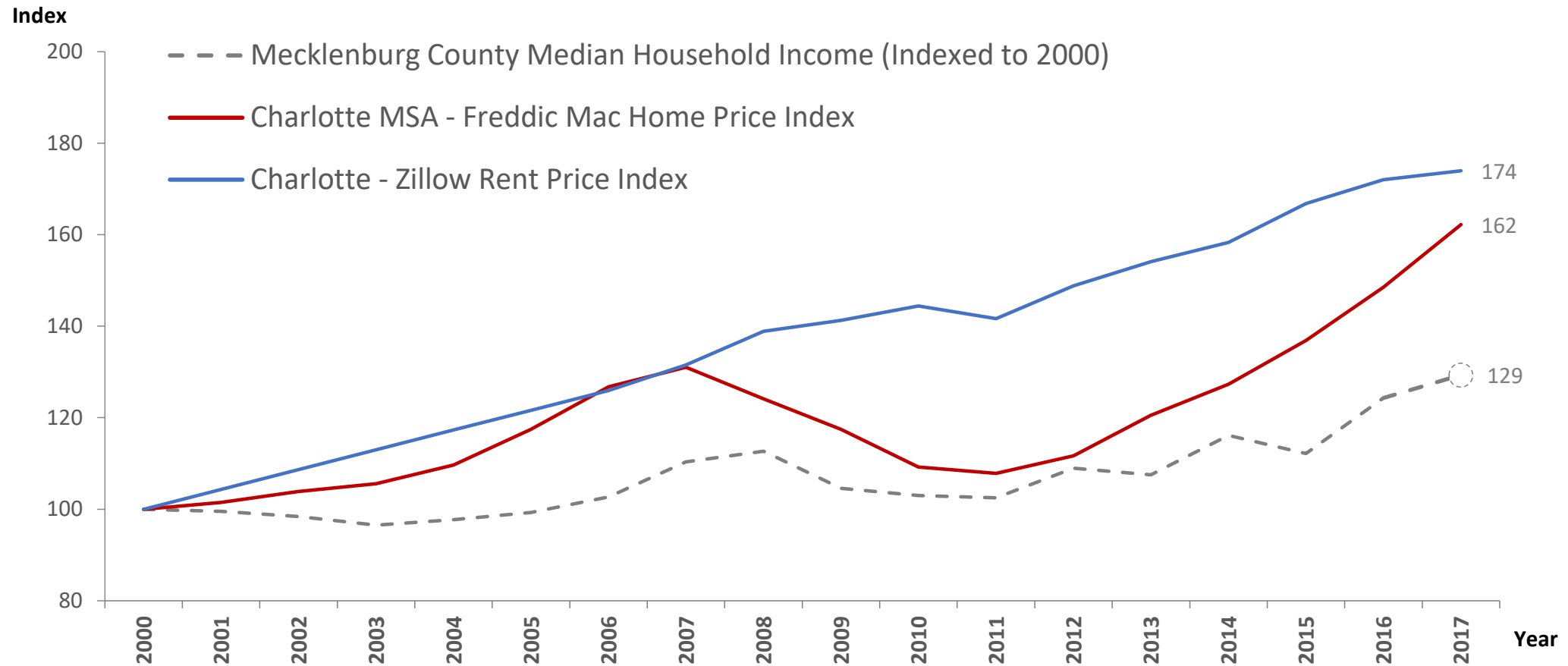
Source: Zillow; US Census; Freddie Mac; Economic & Planning Systems

How Do Plans Work?

West End Land Use & Pedscape Plan: Recommendations

Recommendation Mix of Land Uses & Building Form

Drawing by LS3P

Buildings were traditionally constructed as mixed-use structures, allowing people to live within an easy walking distance from commercial uses. Pictured below is a grocery store with residences and green space built on top.
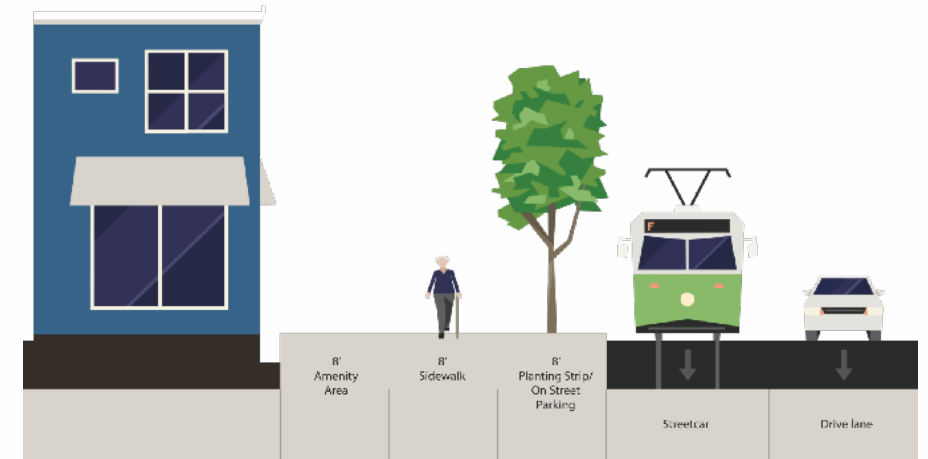
Recommendation
Streetscape **standards** for new development:
8' Amenity Zone, 8' Sidewalk, 8' Planting Strip

How Do Plans Work?

Mosaic Village

Streetscape Standards built to Zoning Code

8' Amenity Zone

8' Sidewalk

8' Planting/ Parking

- Constructed in 2012
- Public-Private Partnership
- Zoned B-1 (PED-O)
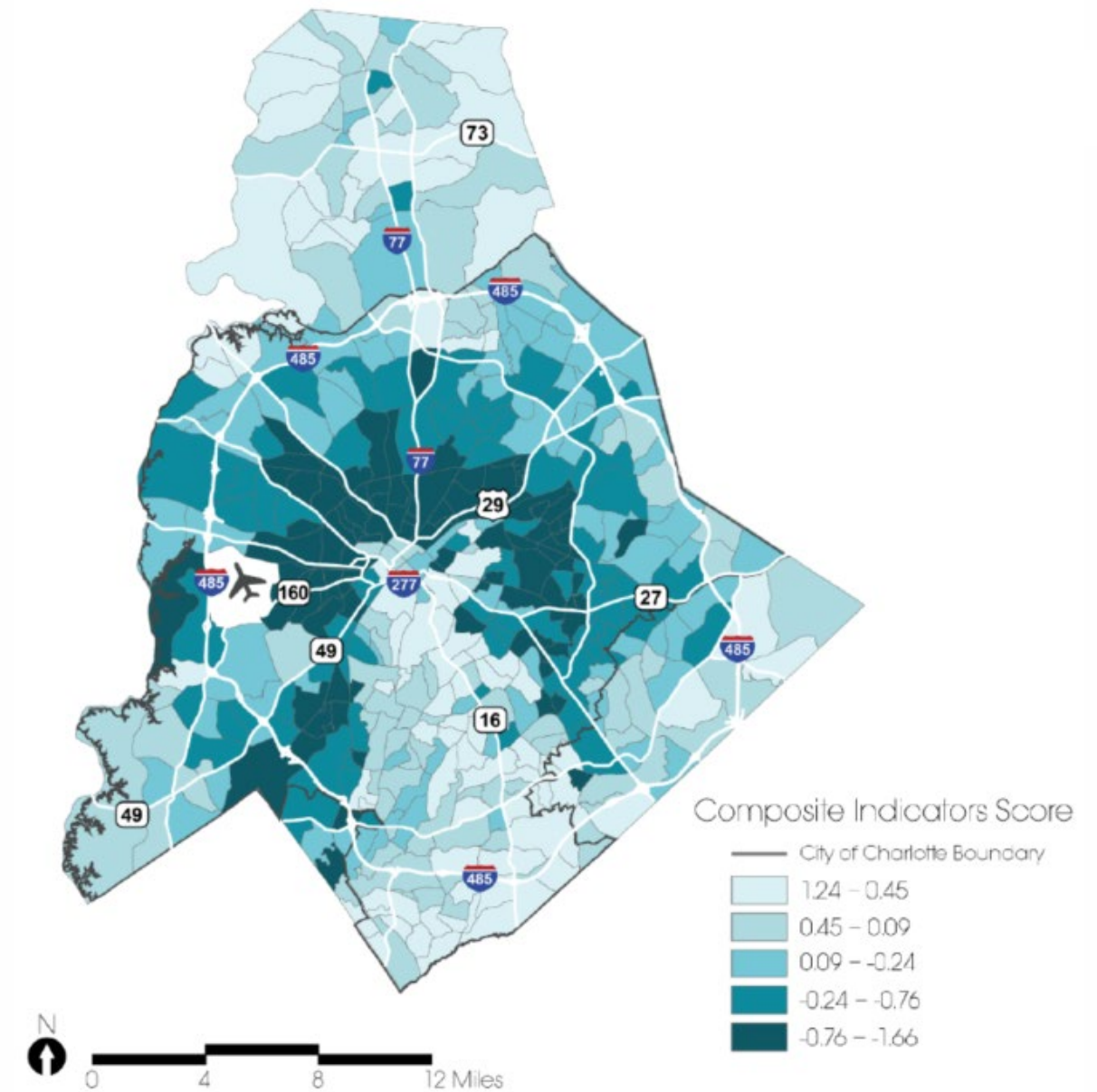
CHARLOTTE. M|G

Vulnerability to Displacement Index

Composite Indicators Score

— City of Charlotte Boundary

1.24 – 0.45
0.45 – 0.09
0.09 – -0.24
-0.24 – -0.76
-0.76 – -1.66

Note: Negative numbers indicate a higher probability of displacement, while positive numbers suggest a low probability.

Equitable Development

Equality in Public Investment
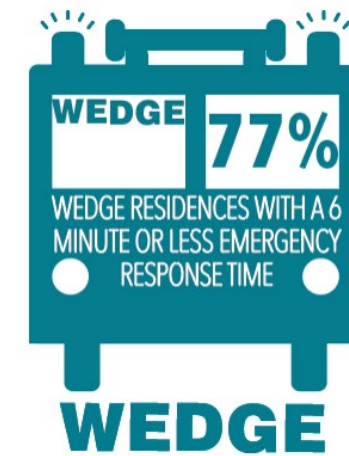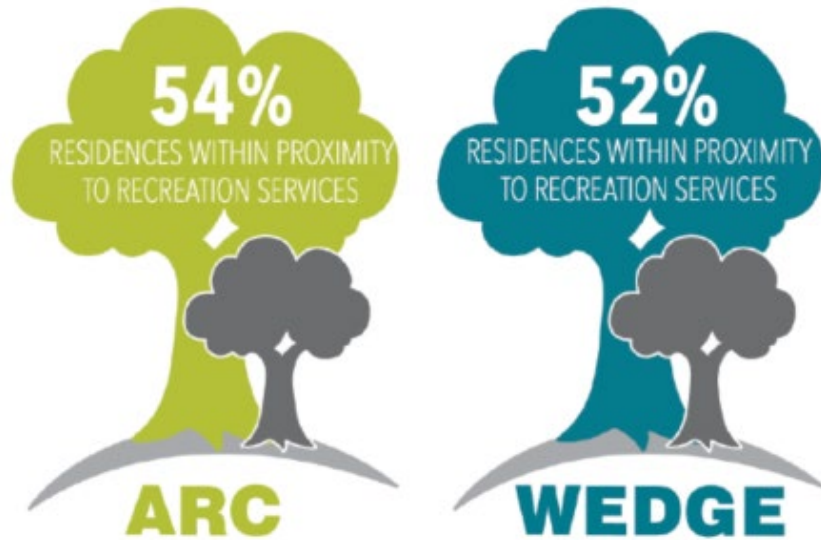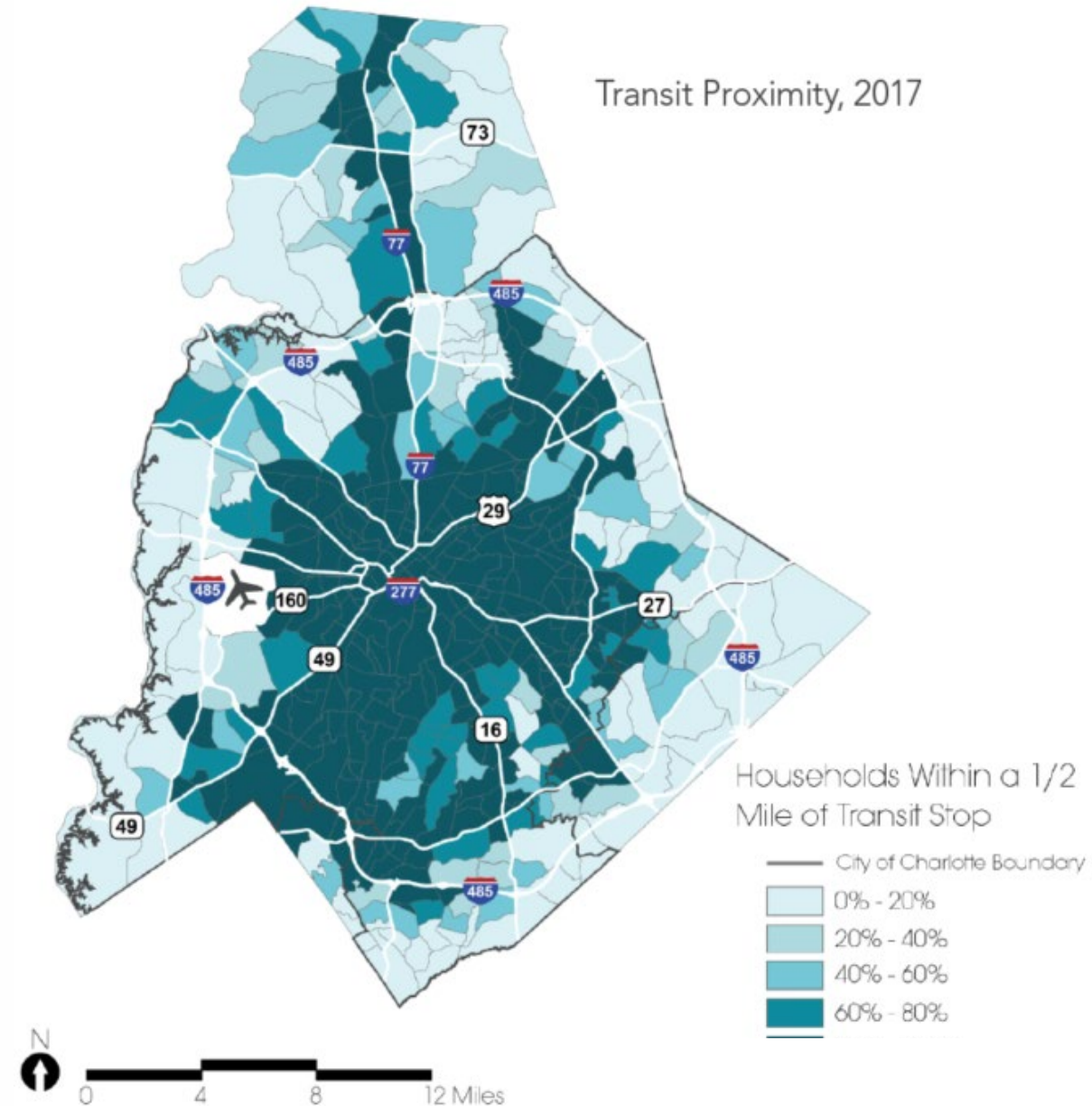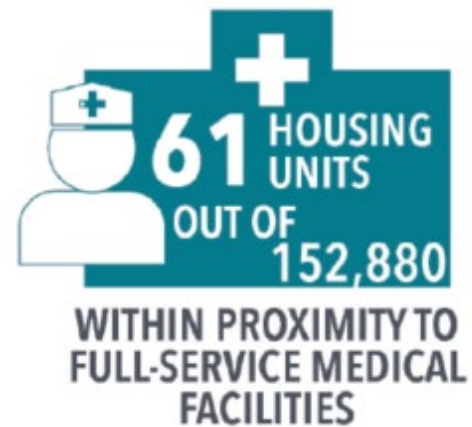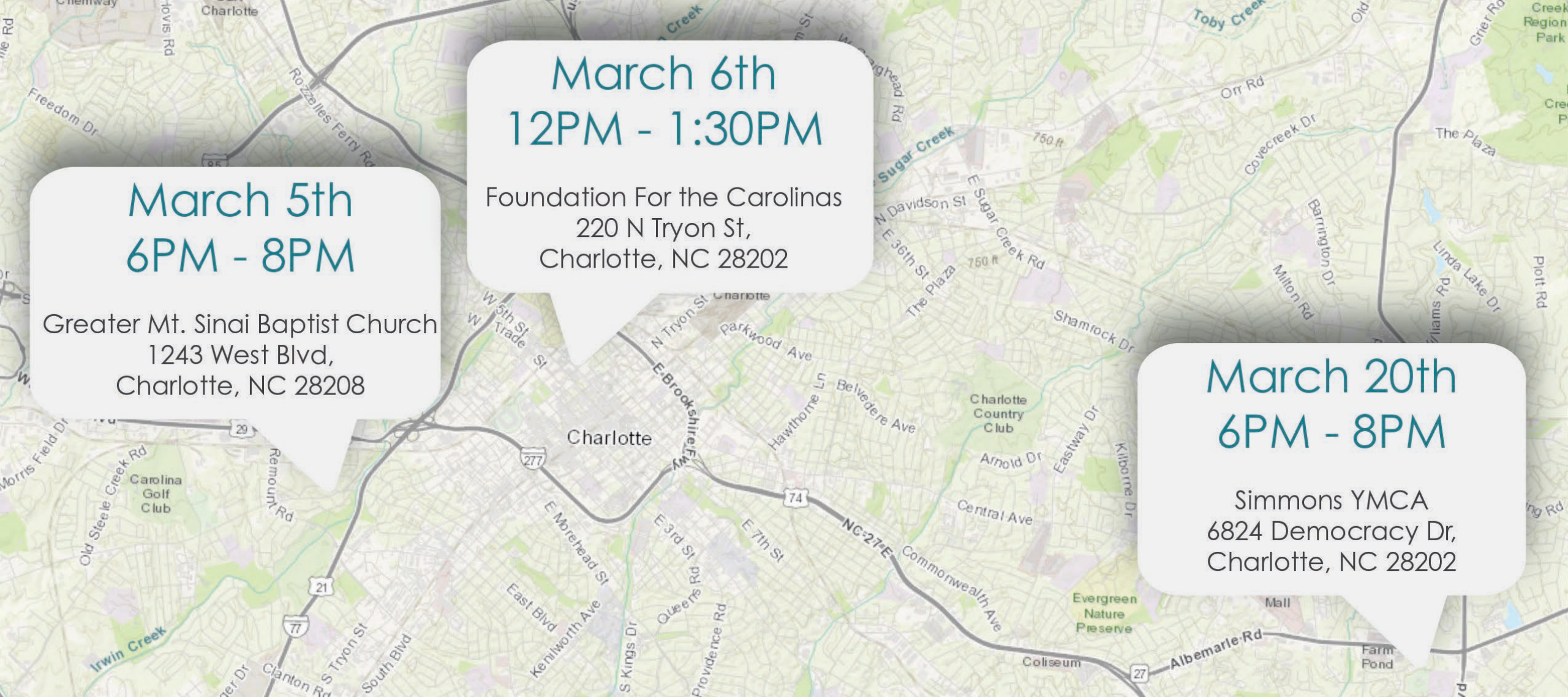
Inequitable Private Investment

Charlottefuture.com/2040

March 5th
6PM - 8PM

Greater Mt. Sinai Baptist Church
1243 West Blvd,
Charlotte, NC 28208

March 6th
12PM - 1:30PM

Foundation For the Carolinas
220 N Tryon St,
Charlotte, NC 28202

March 20th
6PM - 8PM

Simmons YMCA
6824 Democracy Dr,
Charlotte, NC 28202

CHARLOTTE FUTURE | 2040 COMPREHENSIVE PLAN

Vision & Values Workshop

Thank You!

More information and to sign up for updates: **www.charlottefuture.com/2040**
Follow on Facebook: **@cltplanning**

Outcomes – Informing the UDO