

Overview: Factors for Future Expansion of the Development Areas

The following draft factors for identifying **locations** for Development Areas expansion, should an expansion be found to be needed, include an assessment of infrastructure needs and impacts, expectations for development patterns in expanded areas, and protection of natural resources. They are based on recommendations in the current Comp Plan, the AC44 Framework, and input from service providers.

TRANSPORTATION

- Adequacy of transportation infrastructure and planned projects: traffic volumes, crash data, existing bike/pedestrian/transit access, planned improvements/projects
- Multimodal transportation options and connected street networks with new development

SCHOOL CAPACITY

- Assessment of current and future school capacity and potential impacts on capacity
- Assessment of possible areas for future school sites

PUBLIC WATER & SEWER

- Ability to be served by public water and sewer, either currently or feasibly in the future. Coordination with ACSA and RWSA so these agencies can plan for infrastructure that would be needed to serve any expanded areas

COMMUNITY FACILITIES & SERVICES

- Adequacy of service by Fire/Rescue, Police, and other community services and related facilities
- Proximity to community centers, libraries, schools, and other facilities

NATURAL RESOURCES & ENVIRONMENTAL FEATURES

- Assessment of the presence of steep slopes, stream buffers, and areas within the floodplain
- Assessment of the presence of areas identified for enhanced protection, such as important forest blocks and conservation areas identified in the Biodiversity Action Plan or mountain protection areas
- Avoidance of sensitive environmental features with new development

IF LOCATED IN THE WATER SUPPLY WATERSHED...

- If any potential areas for expansion fall within a water supply watershed, evaluation of whether there is existing development within the water supply watershed and/or underlying by-right zoning districts that would allow development. Areas with no existing development or underlying by-right zoning that would allow development should be avoided if there are feasible alternative locations

LAND USE AND FORM OF DEVELOPMENT EXPECTED

- A variety of housing types, a mix of uses, parks, trails, multimodal transportation options, and employment centers, consistent with the Framework for an Equitable and Resilient Community, with new development
- Consistency with the Neighborhood Model Principles

ACCESS TO PUBLIC PARKS, RECREATION, AND TRAILS

- Assessment of existing access to parks, recreation, and trails
- Assessment of where additional amenities may be needed and feasibility of connecting to existing parks and trails
- Parks, recreation, amenities, and open space with new development

POTENTIAL IMPACTS TO AND OPPORTUNITIES FOR NEARBY AND ADJACENT DEVELOPMENT

- Assessment of potential impacts to nearby and adjacent properties and potential opportunities to connect existing neighborhoods with new centers, neighborhoods, and parks/trails

EXISTING DEVELOPMENT AND ZONING (BY-RIGHT USES)

- Assessment of existing development and uses allowed per underlying by-right zoning, and the impacts of encouraging continued development in these locations

There are locations currently outside of the Development Areas with by-right zoning, other than Rural Area, and locations within the ACSA Jurisdictional Area for public water and/or sewer. These areas can develop under the current by-right zoning in a way that is typically inconsistent with the Rural Area.

The following draft factors could help guide **when** a Development Areas expansion may be needed. These draft factors reflect the current Comp Plan recommendations to regularly update and monitor the land use buildout analysis and add additional factors to consider.

ROLE OF THE LAND USE BUILDOUT ANALYSIS ('CAPACITY ANALYSIS')

- Continue to update the land use buildout analysis every two years
- Monitor the rate of development in the Development Areas compared with the Rural Area
- Compare estimated future demand for housing and businesses/economic development with estimated capacity
- Track the remaining percentage of the Development Areas land considered to have development capacity

OTHER FACTORS TO CONSIDER

- Cost of Housing
 - Not realizing the full buildout of the Development Areas and limiting the supply of available housing can drive up costs locally and push new residential growth into surrounding localities, potentially increasing commute times and placing the greatest burden on lower-income households.
- Vacancy rates for non-residential land use (retail, office, industrial) and cost of leasing space for non-residential land uses
 - Increasing demand for non-residential space could lead to costs rising and businesses needing to look for space in other localities if there is not sufficient readily available land/sites for these types of uses.

In the fall of 2022, an updated land use buildout analysis (previously named the capacity analysis) was completed. The land use buildout analysis provides an estimate, using a series of assumptions, of the theoretical maximum number of additional homes ('dwelling units') and square feet of non-residential land uses (such as office, commercial/retail, and industrial) that could be built within the County's Development Areas.

Assumptions are used to identify land within the county's Development Areas that is vacant or has the potential to redevelop. Land that is significantly restricted (e.g. a property that is located entirely within the floodplain) is not included. Once land that could develop or redevelop is identified, additional assumptions are applied to each property based on its future land use designation. The future land use designation was used to create a potential buildout of each property. Applied across the Development Areas, the analysis estimates the theoretical maximum buildout, which may not be achievable due to environmental and economic constraints.

The buildout analysis allows estimated population growth and estimated demand for office, retail, industrial, and hotel land uses in the next 20 years to be compared with the estimated Development Areas land that is available for development or redevelopment. Based on data projections from the Weldon Cooper Center, Albemarle County's population in 2044 will be approximately 143,379. This projection indicates an increase of 31,000 residents compared with 2020 (Census baseline year).

Land Use	20 Year Demand Forecast		Maximum Land Use Buildout Estimate
	Low	High	
Residential (units)	11,500	13,500	24,133 <i>(includes pipeline)</i>
Retail (sq ft)	1,000,000	1,300,000	1,900,000
Office (sq ft)	750,000	1,000,000	2,700,000
Industrial (sq ft)	950,000	1,100,000	5,500,000
Hotel (rooms)	750	900	2,554

Key takeaways from the land use buildout analysis include:

- There appears to be sufficient land in the Development Areas to accommodate projected housing and employment growth in the next 20 years, assuming development at the higher ends of recommended density/intensity per future land use recommendations.
- An estimated **6.9%** of land in the Development Areas (0.3% of total county land) has capacity for new development or redevelopment. With the 2015 Comp Plan update, that estimate was 11%.
- A review of recent residential rezonings (past 5 years) found that the average approved density was **58%** of the maximum density recommended in the Comp Plan. Developments designated Urban Density Residential (6-34 units/acre) were approved at an average of 17.62 units/acre.
- Based on the **economic development tier analysis**, only 39 parcels in the Development Areas were at least 3 acres, currently vacant, and already zoned or designated for commercial, light industrial, flex, office, or industrial uses. Only one property in the Development Areas met the description of a Tier 4 site where infrastructure is in place, site challenges have been addressed, and a project could be brought to market in 12 to 18 months.
- Based on feedback from local real estate stakeholders, the decline in completion of new industrial space is likely influenced by higher land costs in Albemarle County, competition from nearby markets, and limited availability of properties that are prepared for development. To the extent that improved sites (with existing utilities, appropriate zoning districts, and other site readiness factors) are not available in Albemarle County, demand would likely shift to surrounding counties with similar access to highway corridors and labor market.

There are several factors that impact how and at what density and intensity a site ultimately develops, including:



As noted above, recent trends indicate that many projects ultimately build out at less than the maximum recommended density.

Other factors need to be considered for the ability of new and expanding businesses to locate in Albemarle County, including the Tier Analysis, which measures site readiness on a scale from Tier 1 to Tier 5. Tier 1 sites are the least ready for development (raw land) and Tier 5 sites are ready for construction. Only one property in the Development Areas met the description of a Tier 4 site where infrastructure is in place, site challenges have been addressed, and a project could be brought to market in 12 to 18 months. None of the properties met the definition of a Tier 5 site. Staff estimated that nine additional properties could also support development in the 12-18-month timeframe but may require some extension of infrastructure.

It should be noted that all but one of the sites identified as having the potential to support non-residential development in a 12-18-month timeframe are in the Hollymead Development Area. The future buildout capacity of the Hollymead Development Area could be constrained by current infrastructure capacity. Additionally, a concentration of most of the County’s ready sites in a singular location undermines the goals of Project ENABLE, the County’s current economic development strategic plan. One of the foremost goals of Project ENABLE is to retain existing businesses that are expanding in the County (Goals 1, 2, 3). A diversity of sites regarding both size and location is needed to be successful in supporting these goals.

Connections to the AC44 Framework



Having factors for the location and timing of potential future expansion supports the AC44 Framework by identifying natural resources and sensitive areas to protect, establishing expectations for future development patterns to have a mix of uses, parks, employment centers, a variety of housing types, green and resilient design, and connected networks for multimodal transportation, parks/trails, and wildlife corridors/habitats, and coordinating public facilities and services.

Green and Resilient:

- New neighborhoods (either in current Development Areas or future expanded Development Areas, should an expansion occur) should incorporate green and resilient design including compact, mixed-use developments with parks/trails
- New development should avoid sensitive environmental features and areas identified for protection

Welcoming and Equitable:

- New development can provide opportunities for a mix of uses, parks, trails, and a variety of housing types
- Any expanded Development Areas should support equitable access to a range of services, amenities, and employment opportunities

Connected and Accessible:

- New development should have multimodal transportation options and connect to surrounding transportation network
- New development could support feasibility for enhanced public transit
- Locations of new development should protect wildlife corridors/habitats and avoid disrupting corridor connections

Thriving and Prosperous:

- New development in expanded Development Areas could provide space for new businesses or expanding existing businesses and employment centers and job opportunities