



MEMORANDUM

Date: October 16, 2025

To: Luke Winchester, Chairman
and Planning Commission

From: Jon Baughman, City Planner
Jill Johnson, Planner I

Re: Courtyards at McFarland
PMDP-PUD, Rezone, Annexation
Map - 077
Parcel(s) – 001.00 & 001.03

Request: Ragan Smith, on behalf of their client, Epcon Communities, is seeking an Annexation, Plan of Services, Rezone and a Preliminary Master Development PUD approval for a commercial mixed-use development, the Courtyards at McFarland. This proposal includes an age-restricted residential component along with commercial uses. The site is located at 5025 Old Lebanon Dirt Rd. This is in District 3, which is represented by Commissioner Scott Hefner.

History/Overview: The subject property consists of approximately 39.34 acres on the north side of Old Lebanon Dirt Road, east of N. Mt. Juliet Road. The property is currently in Wilson County and is zoned R-1. The base zoning requested for the entire site is CMU. There is a cemetery, on its own parcel (77 01.03), included as part of this annexation and rezone. The applicant has submitted another version of this plan, for residential use only, but a land use amendment, required for RM zoning, was not approved by the Board of Commissioners.

The proposed density for the residential portion of the site is 3.35 units per acre and a total residential unit count of 124 units. This includes 8 front-loaded single-family homes, 37 alley loaded single family homes, and 79 alley loaded townhomes. Approximately 9.25 acres of the PUD is devoted to commercial use, exceeding the minimum for mixed use PUDs (25%). Commercial square footage is not notated on the plans but based on the parking calculation ratio and number of spaces provide it is at 41,000sf.

The City's land use plan currently identifies the property as mixed use and the future land use plan aligns with the CMU-PUD request, so therefore no land use amendment is required. A summary of the request is provided below:

REQUEST	Land Use Map	Requested Classification	Current Zoning	Requested Zoning
<i>PMDP-PUD, Rezone, Annexation & POS</i>	<i>Mixed Use</i>	<i>N/A</i>	<i>Wilson County R-1</i>	<i>CMU-PUD Commercial Mixed Use Planned Unit Development</i>

Future Land Use: There is no change required as the current land use is mixed use.

Zoning: The zoning is R-1 in Wilson County. The applicant is seeking CMU-PUD, commercial mixed use, with a PUD overlay, for the entire development area.

Annexation/Urban Growth Boundary: The subject property is within the City's urban growth boundary.

Plan of Services: A plan of services is included for review.

Findings: In reviewing the requested zoning actions, staff finds that the request agrees with all of the following findings, as contained in the zoning ordinance. The proposed annexation and rezone:

- 1. is agreement with the general plan for the area, and*
- 2. does not contravene the legal purposes for which zoning exists, and*
- 3. will have no adverse effect upon joining property owners, unless such effect can be justified by the overwhelming public good or welfare, and*
- 4. is not materially beneficial to a property owner or small group of property owners and will not be detrimental to the general public, and*
- 5. is possible because conditions affecting the area have changed to a sufficient extent to warrant an amendment to the zoning map, and*
- 6. allows uses by right, for which the base infrastructure is in place or will be required, to support their operation.*

Preliminary Master Development Plan:

Overview: The development timeline shows phase 1 construction to begin in August 2026, with anticipated completion by March 2028. This development is proposed for 39.34 acres. There will be 2.34 acres for ROW dedication for the future road widening, 9.26 acres of commercial, 0.50 acres of cemetery and 10 acres of open space. The site is located on the east side of Old Lebanon Dirt Road and is presently undeveloped farm land.

The proposal includes one parcel, of which is to include 125 proposed residential units, consisting of 45 single family residential units, and 79 townhome units. This parcel is also proposed to include several commercial buildings, to be general retail and including 41,000sf . The commercial portion of this development includes 9.26 acres (25% of the total area of the project) shown as general retail.

5-103, 6-103 & 6-104, Bulk Standards: The total number of residential units is 125. The overall residential density is 3.37 units per acre (125 units / 37acres), with an estimated population at buildout of 215. The minimum lot area is 2,976 sf for townhomes and 5,400 sf single family. A bulk standard waiver of 5.103A is sought to reduce the minimum lot area, lot width and yard requirements for the single family and townhomes. A summary of the proposed residential uses:

Front loaded single family: 9 units
Alley loaded single family: 37 units
Alley loaded townhomes: 79 units

Total unit count: 125 units

Required Setbacks per CMU standards:

Front: 30'

Side: 10'

Rear: 20'

Proposed Setbacks for CMU:

Front loaded Single family:

Front: 30'

Side: 5'

Rear: 17'

Alley loaded Single family:

Front: 10'

Side: 5'

Rear: 17'

Alley loaded Townhomes:

Front: 10'

*Side: 0'

Rear: 5'

Building Separation: 20'

Commercial Parcel:

Front: 30'

Side: 10'

Rear: 20'

The specific uses for the commercial portion of the development are only identified as general retail at this time. The plans show seven buildings. The overall gross square footage of commercial space is not provided, staff has calculated this to be approximately 41,000sf, based on parking calculations provided. Other details pertaining to the bulk regulations will be revealed at FMDP/site plan submittal where full compliance, excepting any waivers granted, will be required.

Open Space/Amenities: The applicant has shown 10.00 acres (27%) of open space in the PUD. The scope of open space improvements are shown as passive public parkland with a walking trail, and an HOA maintained cemetery. The amenities as shown are to include a private amenity center, pickle ball court, pool and a pavilion with a walking path around the eastern portion of the property.

Pedestrian/Vehicle Connections: Vehicular connections are provided via four access points along Old Lebanon Dirt Road and one to OLDR. There is no notation as to how these access points will line up with the McFarland Farms project to the immediate south of this property. Pedestrian connections are shown on this PMDP and further refinement will occur at FMDP plan review. A sidewalk connection to the commercial portion is shown on southwest portion of the parcel. Vehicular access to the commercial area, from the residential, and vice versa is accommodated.

Bicycle parking will be required per code requirements. Wheel stops are not shown and are not permitted. Further parking review and refinement will occur upon subsequent submittals.

5-104.1 and 4-114 Development Standards for Multi-Family Development: Approximately 27% of the site is devoted to open space (10 acres). Improvements are to include a minimum 2,000 sf clubhouse, pickleball courts, minimum 800 sf pool, and walking paths. Staff requests that the retention pond and existing cemetery be removed from the list of improved opens space items. At least 10% improved open space shall be maintained. The cemetery is included in the PUD and will be maintained by the HOA.

6-104 Mixed Use Regulations: Commercial uses total 9.25 acres (25% of the site) in several buildings within the PUD. The use listed is general retail and the total square footage proposed is 41,000sf. The parking was calculated using the 1/250 ratio for general retail uses.

6-103.7 Commercial Design Regulations and 5-104.1 Multifamily Design Regulations: As this is a preliminary master development plan, full color elevations, with façade materials and percentages specified, will be reviewed at site plan/FMDP submittal. This PMDP includes conceptual rendering of the proposed structures. Waivers from commercial and residential design guidelines are requested with this PMDP and detailed below. Excepting any waivers granted, all requirements of these sections shall be met. Brick shall be clay, baked and individually laid. Stone shall be individually laid.

Landscaping: The site will require landscape buffers. Enhanced landscape has been request along E. Division and Old Lebanon Dirt Road. Notes provided indicate buffers will be in open space and be the responsibility of the HOA. Notes are provided which indicate as many trees as possible will be saved, and a tree preservation plan will be required if any existing vegetation is to count towards required plant material. A full landscape plan will be required at FMDP/site plan submittal and reviewed for code compliance at that time. Staff requests a landscape screening buffer behind units 121-125 to buffer against the adjacent commercial uses.

Other: All wet retention ponds shall include lighted fountains and include enhanced landscaping. The mail kiosk notes show it will be covered and lit. Notes and details indicate fencing will be low maintenance and decorative and will be the responsibility of the HOA. Site lighting will be reviewed at site plan/FMDP submittal. Staff requests additional details, such as bike rack, decorative trash receptacles, and dumpster location for the amenity center to be provided at site plan/FMDP submittal.

Variances/Waivers -The following waivers are requested:

1. Waiver - 5.103A – Bulk regulations for RM 8 zoning (residential component of the mixed use development). A waiver is requested to reduce the minimum lot area, lot width and yard requirements for the residential homes and townhomes within the development to those shown on the site data table. The commercial portion shall comply with CMU zoning regulations. The request is due to the shared side courtyards of the home, the inclusion of townhomes, pedestrian friendly streetscape and reduced driveway lengths to not allow parking.

a. Minimum lot area requirement: 10,000 sf.

Minimum lot area provided- Townhomes 2,976 sf, Single Family 5,400 sf with average lot area of entire development at 4,547 sf.

PLANNING & ZONING STAFF SUPPORTS DUE TO AGE RESTRICTED DEVELOPMENT.

b. Minimum lot width required : 100'

Minimum lot width provided: Townhomes, 32' and Single Family 53' at building setback.

PLANNING & ZONING STAFF SUPPORTS DUE TO AGE RESTRICTED DEVELOPMENT.

c. Minimum setbacks for CMU (residential portion): 30' Front, 10' Side and 20' Rear

Minimum setbacks provided:

Front loaded single family- 30' front, 5' side, 17' rear

Alley loaded single family- 10' front, 5' side, 17' rear

Alley loaded townhomes- 10' front, 0' side, 5 rear with 20' building separation.

PLANNING & ZONING STAFF SUPPORTS

2. Waiver – requested to the standard roadway cross sections outlines in the subdivision regulations roadway dimensions

1. Public road “C” (5' walk, 5' grass strip, 2.5' curb and gutter, 12' lanes, 0.5' clear behind walk within r-o-w, 50' ROW)
2. Public road “B” (5' walk, 8' parallel parking zone or 5.5' grass strip with 2.5' curb and gutter at islands, 12" lanes, 50' ROW, 0.5' clear behind walk within r-o-w)
3. Private alleys (0.5' post curb, 11' lanes)
4. Private one way drives (0.5' post curb, 8' parking zone, 15' lane, 6.5' sidewalk on one side with 7' walking surface inclusive of curb)

PUBLIC WORKS TO DECIDE

3. Waiver – requested to the residential supplemental regulations on architecture for all residential facades and the clubhouse. Minimum of 65% would be required to be brick/stone and up to 35% per side may be hardie/fiber cement, stucco or other cementitious material for the residential structures. A minimum of 75% brick/stone would be required on the clubhouse with up to 25% hardie/fiber cement, stucco or other cementitious material. PLANNING AND ZONING STAFF SUPPORTS, FOR THE RESIDENTIAL AREAS ONLY, PROVIDED THE FOLLOWING:

- a) No two house plans and elevations shall be situated and built next to one another,
- b) No two house plans and elevations shall be situated and built across the street from one another.
- c) High visibility lots shall have 100% brick/stone.
- d) High visibility lots shall not have blank end facing the street side and shall
- e) include architectural features such as optional window packages and or fireplaces.
- f) The use of vinyl shall be prohibited.
- g) Two garage doors shall be provided with a 2' brick column to separate. Garage
- h) doors shall be carriage style.
- i) Identify secondary material.

4. Waiver – 5-104.4 – Garage doors separate by a masonry column for single family residential.

PLANNING & ZONING STAFF SUPPORTS

5. Waiver – To allow private streets.

PUBLIC WORKS TO DECIDE

Summary: The applicant has modified previous iterations of this plan to now be a commercial/age-restricted residential mixed-use project. This development will add approximately 41,000sf of commercial space, and 125 age restricted residential units (estimated population of 215) to sit between E. Division Street and Old Lebanon Dirt Road, east of N. Mt. Juliet Road. This property is in the urban growth boundary. The proposed rezone agrees with the recommendations in the City's future land use plan. The waivers and variances listed above are subject to Planning Commission and Board of Commissioners approval.

Recommendation: Staff recommends the Planning Commission forward a positive recommendation to the Board of Commissioners for the annexation, plan of services, rezone and preliminary master development plan for the Courtyard at McFarland Mixed Use PUD on Old Lebanon Dirt Road, with the following conditions:

Planning and Zoning:

1. Provide a phasing plan.
2. Commercial structures shall adhere to the design guidelines found in 6-103.7.
3. All requirements of the City's subdivision regulations shall be adhered to, excepting any waivers and variances approved by the Board of Commissioners.
4. All bulk standards 5-103A and 6.103A shall be adhered to excepting any waivers granted by the Board of Commissioners.
5. The 5-104.7 multi-family residential zoning regulations shall be adhered to, excepting any waivers and variances approved by the Board of Commissioners.
6. All requirements of 6-103A shall be adhered to, excepting any waivers and variances approved by the Board of Commissioners.
7. Screen residential HVAC units with landscaping or masonry. Specify this and verify the location of such equipment on the FMDP submittal.
8. All building mounted exterior lighting fixtures, shall be decorative, provide details at FMDP submittal.
9. Paint exterior wall mounted utility and meter equipment to match the façade it is attached to.
10. Mail retrieval areas shall not count towards improved open space.
11. Brick shall be clay, baked and individually laid.
12. Stone shall be individually laid.
13. Rooftop utility equipment shall be screened entirely from horizontal view via parapet walls.
14. Provide decorative street lighting throughout, also provide street light details at FMDP submittal. The maintenance and operating cost shall be the responsibility of the HOA.
15. Ensure light bleed from the amenity center and commercial area do not negatively impact the residential lots nearby. A photometric plan shall be required at FMDP submittal.
16. Mail kiosks shall be covered and well lit and include designated parking.

17. All amenities shall be completed by issuance of the 75th certificate of occupancy.
18. Provide farm style fencing along both the Old Lebanon Dirt Road, and East Division property lines to enhance the street scape. Fencing shall be decorative and constructed of low maintenance materials.
19. Provide enhanced landscaping around all detention/retention areas.
20. Provide a lighted fountain in any wet pond.
21. Street facing, single family detached, garage doors shall be separated by a 24" bricked column and shall be carriage style (or decorative in nature).
22. Signage to be reviewed via separate application to the Planning Department.
23. Preserve as many trees as possible, especially around perimeter. Provide a tree preservation plan with FMDP submittal.
24. Existing trees can be utilized for perimeter buffer, should a tree survey be prepared and the material meet code requirements.
25. Parking for commercial uses shall be determined when users are identified.
26. Provide decorative low maintenance fencing and enhanced landscaping around the perimeter of the cemetery. Provide details at FMDP submittal.
27. A complete landscape plan will be required at FMDP submittal.
28. Provide formalized location of trail routing at FMDP submittal.
29. Provide formalized elevations to include all materials and percentages at FMDP.
30. Please provide information within the deeds and covenants, keeping this development age restricted in perpetuity.
31. Provide a landscape buffer where residential units are adjacent to the commercial use area.

Engineering:

1. The following variances or waivers are being requested:
 - [Sub. 4-103.3] to allow private streets: SUPPORTED
 - [Sub. 4-104.405] to allow stubbing an access street to an adjacent property: SUPPORTED
 - [Zoning 5-104.4 (10)] to allow front loading lots on an access street: SUPPORTED only on one side of the street. The current plan shows two additional lots on the other side of the street to be accessed by the alley or private drive.
 - [ST-121] Waiver to allow the proposed 55' right-of-way cross section on Road B: SUPPORTED.
 - [Zoning 9-104.3] to reduce the drive aisle width from 15' to 12' adjacent to parallel parking: SUPPORTED.
2. If wet ponds are used, aeration shall be provided.
3. In the event karst features are encountered during grading, a licensed geotechnical engineer shall document the feature, and the feature shall be located by a licensed surveyor. If the feature is to be remediated, the geotechnical engineer shall provide a remediation plan to the City for approval. Efforts will be made to minimize any remediated features within building envelopes.
4. All sewer shall be public (minus laterals) and be within a 20' (minimum) easement.
5. Determination if public sewer allowance in an alley will be determined with FMDP submittal.
6. No onsite grinder systems or step systems will be allowed for this development.
7. In lieu of the required sidewalk within the Division Street ROW, staff requests a 10' private trail within an access easement on the HOA open space along the site.

8. Traffic calming devices shall be installed on Road A. The type of devices and location shall be determined at FMDP. All traffic calming devices must comply with ITE guidance.
9. The developer has agreed to provide a 50' ROW dedication to the City for the City's widening project of East Division Street.
10. Road A shall be a public street and not gated.
11. The developer has agreed to designate the open space just south of the ROW dedication on East Division Street as a PUDA and slope easement in preparation for the City's project of the widening of East Division Street. Continued coordination shall take place as the City project progresses.
12. E. Division Street shall be improved to include a 12-foot-wide eastbound travel lane and a 4' paved shoulder (full depth asphalt section) with a 4:1 or flatter backslope along the project frontage. In addition, E. Division Street shall be resurfaced along the project frontage. The following considerations shall be included in the improvement:
 - The City will have to annex E. Division Street between Clemmons Road and Old Lebanon Dirt Road for this improvement to be made. The development team shall notify the Director of Engineering approximately 120 days prior to mobilization to start the annexation process.
 - This improvement shall be made before the signing of the first final plat.
 - The backslope shall be free of any fixed object that is not crash rated.
13. A left-turn lane with at least 50' of storage and adequate taper shall be installed on E. Division Street at the project entrance. This improvement shall be made prior to the signing of the first final plat.
14. Any utilities relocated during this development shall be relocated to a location compliant with the City's E. Division Street widening project at the developer's expense.
15. Choke points or bulb outs shall be provided on the one-way roads between the buildings to provide traffic calming as shown on the plans.
16. The one-way streets shall include curb and gutter on one side with post curb on the other. The road shall slope down to the gutter at a slope on 2%. The sidewalk on the one-way streets shall be 7' wide (inclusive of curb width) to allow continuous pedestrian access with vehicle intrusions such as open doors.
17. Landscaping plans shall be approved prior to the issuance of the Land Disturbance Permit.
18. A letter from West Wilson Utility District with their approval of the project shall be provided to Engineering prior to the issuance of the Land Disturbance Permit.
19. All alleys and one-way streets will be private.
20. No parking shall be provided on the alleys.
21. Sidewalks abutting parking shall be at least 7' wide (inclusive of curb width).
22. All pedestrian facilities shall comply with ADA and PROWAG standards.
23. Adequate sight distance shall be provided at all intersections. Sight distance profiles shall be provided at FMDP.
24. The centerline of Road A and Road C shall align with the centerline of the McFarland Farms entrances across Old Lebanon Dirt Road.
25. All parking lots shall meet or exceed the dimensions provided in Article IX of the Zoning Ordinances.
26. EPSC measures shall not be installed in the buffer.

WWUD:

1. The water lines shown are not WWUD's design.
2. Roadway improvements shown will require water line relocations.