

**Town of Montreat
Planning & Zoning Commission (P&Z)
Special Meeting Agenda
August 6, 2026, 10:30 a.m.
Town Hall 1210 Montreat Road, Montreat, NC 28757**

- I. CALL TO ORDER**
 - Welcome
 - Moment of Silence
- II. ADOPTION OF AGENDA**
 - **Suggested Motion:** To adopt the meeting agenda as presented/amended
- III. ADOPTION OF July 16, 2026, MEETING MINUTES**
 - **Suggested Motion:** To adopt the July 16, 2026, Meeting Minutes as drafted/amended.
- IV. OLD BUSINESS**
 - **PLANNED UNIT DEVELOPMENT ZONING REQUEST & PUBLIC HEARING- CONTINUED FROM JULY 16, 2026**
- V. NEW BUSINESS**
 - **STORMWATER SUBCOMMITTEE UPDATES & DISCUSSION**
 - **ZONING ADMINISTRATOR UPDATES & DISCUSSION**
- VI. REMINDER OF NEXT MEETING DATE**
 - **October 15, 2026**
- VII. PUBLIC COMMENT**
- VIII. ADJOURNMENT**

Planning & Zoning Commission Meeting

July 16, 2026, 10:30 a.m.

Meeting Minutes

Commission Members in Attendance:

Julie Schell, Chair
Clay Hamilton, Vice-Chair
Eleanor James
Bill Tucker|
Mike Broussard
Sally Jenkins, Alternate Member
Gayle Sawyer, Alternate Member (from 12:10 p.m. – approx. 3:15 p.m.)
Allen Crawford, ETJ Member (from 10:30 a.m. – 12:10 p.m.)

Town Staff in Attendance:

Alexis Baker, Interim Zoning Administrator
Angie Murphy, Town Clerk
Savannah Parrish, Town Manager
Brandon Freeman, Town Attorney

Members of the Public in Attendance:

Approximately 40 – 50 people

Call To Order

Chair Julie Schell called the meeting to order at 10:33 p.m. and led those in attendance in a moment of silence.

Adoption Of Agenda

Prior to adoption, Town Attorney Brandon Freeman presented two staff-recommended amendments to the agenda.

The first amendment was the inclusion of a Special Order for the public hearing on the Planned Unit Development application. Attorney Freeman explained that while the hearing had already been publicly noticed and was always intended to include public comment, the Commission's rules of procedure (Rule 24) explicitly require the adoption of a Special Order setting forth the subject, date, place, time, and speaker time limits for such hearings. He noted that the rule is likely a holdover from an early draft borrowed from the City of Asheville, and that it is redundant given the information already contained in the published agenda. The Special Order clarified that the subject property is 309 Collegiate Circle, the hearing would

take place at the current date, time, and location, and that each member of the public would be allotted five minutes to speak.

The second amendment was to the Commission's rules of procedure to delete Rule 24 in its entirety and replace it with updated language governing public hearings, eliminating the redundant requirement going forward.

Before proceeding to the vote, the Chair advised the public that there would be three separate opportunities for public comment during the meeting, each with a five-minute time limit per speaker, and asked attendees to be mindful of avoiding repetitive comment across the multiple comment periods.

Motion to amend the agenda as described by Town Attorney Freeman was made by Commission Member Bill Tucker and seconded by Commission Member Eleanor James. The motion carried unanimously.

Motion to adopt the Special Order for the 309 Collegiate Circle PUD public hearing was made by Commission Member Eleanor James and seconded by Commission Member Sally Jenkins. The motion carried unanimously.

Motion to amend the rules of procedure to delete Rule 24 in its entirety and replace it with updated public hearing language was made by Commission Member Eleanor James and seconded by Commission Member Bill Tucker. The motion carried unanimously.

Adoption Of April 16, 2026, Meeting Minutes

Commission Vice-Chair Clay Hamilton recommended that follow-up items identified during meetings be highlighted or separated in the minutes in the future, as they tend to get lost within the body of the document. Commission Member Bill Tucker echoed this concern, noting that approximately three or four follow-up items had been identified at the prior meeting without a clear action plan attached to them. The Chair agreed and indicated that the Commission would need to formally identify follow-up items at the close of relevant agenda sections so that they could be tracked.

Two specific textual amendments were approved: the figure "98 percent" in the last paragraph of packet page 4 was changed to "numerous" to more accurately reflect the statement made, and a spelling correction was made to the Chair's name on the signature line.

Motion to adopt the April 16, 2026, meeting minutes as amended was made by Commission Vice-Chair Clay Hamilton and seconded by Commission Member Eleanor James. The motion carried unanimously.

Public Comment

Priscilla Hayner of 319 Assembly Drive addressed the Commission to seek clarification on the structure of public comment during the planned unit development hearing. She asked whether the public comment period within the hearing would function as a standard comment period following the staff report and applicant presentation, and prior to any Commission decision. The Chair confirmed that the process would proceed with the Interim Zoning

Administrator presenting the staff report, followed by the applicant's presentation, after which public comment would be opened.

No other members of the public came forward.

Old Business

The Chair noted that ongoing work related to signage regulations has been in process collaboratively with the Town Council. The Chair indicated that the matter is currently awaiting further action from the Council. Interim Zoning Administrator Alexis Baker confirmed this characterization. No further old business was raised.

New Business

- **Planned Unit Development Zoning Request & Public Hearing**

Motion to open the public hearing for the 309 Collegiate Circle Planned Unit Development rezoning application was made by Commission Member Bill Tucker and seconded by Commission Member Sally Jenkins. The motion carried unanimously.

Conflict of Interest Disclosure

Prior to the staff report, the Chair invited Planning & Zoning Commission members to disclose any potential conflicts of interest. Town Attorney Freeman read the applicable legal standard, which prohibits Commission members from voting on any zoning map or text amendment where the outcome is reasonably likely to have a direct, substantial, and readily identifiable financial impact on the member. The Chair disclosed her own prior involvement with the Montreat Stewards in a communications capacity prior to joining the Planning & Zoning Commission and indicated this did not rise to the level of a conflict of interest. No Commission member came forward with a conflict requiring recusal.

Staff Report — Interim Zoning Administrator Alexis Baker

Interim Zoning Administrator Baker presented an overview of the PUD application. She clarified at the outset that in Montreat, a Planned Unit Development is a rezoning or map amendment processed under the legislative hearing process — not a quasi-judicial special use permit as seen in neighboring jurisdictions. Per Section 511.3 of the Montreat Zoning Ordinance (MZO), a PUD creates a new zoning district that replaces the existing one, and the development standards and land uses in the approved PUD master plan become the zoning regulations for that district.

The application was submitted by Richard DuBose on behalf of the property owner, Mountain Retreat Association (MRA), requesting a rezoning of 309 Collegiate Circle (PIN: 0710963451 00000) from the IR (Institutional/Residential) zoning district to a PUD zoning district. Required public notices were mailed, posted, and published in the Black Mountain News. Though not required, the applicant also held two community meetings on April 9 and May 5.

Ms. Baker described the subject property as currently zoned IR, surrounded by Woodland (WL) to the north, Institutional (I) and Woodland to the south, and IR to the east and west. The proposed PUD master plan depicts six buildings: three existing structures (Walnut

Lodge, Hickory Lodge, and Reynolds Lodge, shown in gray), one new 24-room commercial lodge (shown in blue, Phase 1), and two new 8-bedroom cottages (shown in purple).

Ms. Baker detailed the proposed development standards, which include:

- Permitted uses by right: All uses currently permitted in the IR district, plus commercial hotel/lodge and public/institutional conference center.
- Setbacks: 25 feet front and rear; 12 feet sides — consistent with the existing IR district.
- Density: Combined residential bedrooms and nonresidential guest rooms not to exceed 70 rooms/140 beds.
- Total building area: Capped at 80 percent of what is permitted under IR zoning.
- Parking: One standard space per 1,000 square feet of gross floor area; compact car spaces may fulfill required standard spaces.
- Building height: Maximum 40 feet, measured from the average natural grade at the footprint of each individual principal building.
- Building separation: Not required except as mandated by building or fire code.
- Open space: Minimum 20 percent of total lot area.
- Landscaping and screening: Governed by Article 9 of the MZO and Section 504.12–504.13 respectively.
- Multiple principal buildings: Permitted on the parcel.

Ms. Baker concluded by noting that, as a map amendment, the Commission would be required to adopt a consistency statement with the Town's Comprehensive Plan. She cited applicable objectives from Montreat Tomorrow, including provisions to preserve and enhance the character of Montreat, evaluate zoning district regulations, and work collaboratively with institutions such as MRA on future development.

Applicant Presentation — Richard DuBose and Chuck Krekelberg, Altura Architects

Richard DuBose, applicant on behalf of MRA, addressed the Commission remotely. He thanked the Commission and town staff for their thoroughness, and acknowledged the technical assistance provided in completing the application. Mr. DuBose introduced Chuck Krekelberg, Senior Project Manager with Altura Architects, and Tanner Pickett, MRA's Vice President for Communications.

Mr. DuBose explained that the application — sometimes referred to as "Option 2" or the "Cottage Plan" — was chosen by the MRA board after considerable deliberation, even though MRA continues to hold a valid special use permit to develop the property under a previously approved plan. The board concluded that the current PUD application better preserves the lodge's historic purpose and is a more compatible fit with the surrounding neighborhood. He noted that the PUD approach was selected because it would settle the question of long-term use of the property, allow flexibility and innovative design not otherwise permitted, and formally clarify a use that has served conference guests for decades but is not currently permitted by right.

Mr. DuBose described the basis of the proposal: a smaller lodge fronting Assembly Drive, with two residential-style cottage buildings above it, designed to reflect the scale and character of nearby homes on Georgia Terrace. He indicated the application drew from the

existing MZO, the previously approved project, the 2023 and 2008 Comprehensive Plans, and even a 2022 Village Plan proposed by neighbors, incorporating a number of those ideas.

Chuck Krekelberg followed with a detailed walkthrough of the application. He framed the PUD standards as grounded in the IR district, with seven specific deviations:

- Multiple principal buildings are requested given the configuration of the site and its historic use.
- Parking is calculated at one space per 1,000 square feet of gross floor area (per MZO Section 702.4), which Mr. Krekelberg described as a cleaner and more flexible approach compared to the net-increase calculation used in the previously approved plan, which had yielded 62 spaces.
- Hotel/lodge and conference center are added as permitted uses. Mr. Krekelberg acknowledged that under the MZO a lodge is defined as a hotel, though MRA views its operation as meaningfully different from a commercial hotel.
- Density cap of 70 combined rooms/beds across all buildings — a limit drawn from the previously approved plan — is offered as a constraint in exchange for the added use flexibility.
- Open space minimum of 20 percent is a PUD-specific standard above and beyond the 5 percent landscaping minimum required under Article 9.
- Building height is measured from the average natural grade at each building's individual footprint, rather than the average grade of the entire parcel, which Mr. Krekelberg explained is more equitable and accurate when multiple buildings are located at varying elevations across a sloped site. He confirmed the lodge is calculated at 39.5 feet — within the 40-foot maximum.
- Building separation is not required, deferring instead to building and fire codes, in order to allow appropriate placement of the existing buildings such as Hickory and Reynolds.

Mr. Krekelberg then presented conceptual renderings (not part of the official zoning application) showing the proposed lodges and cottages as they would appear from Assembly Drive and Georgia Terrace. He emphasized that the lodge features a hipped roof to reduce its perceived height, underground parking beneath the building, and mechanical units concealed behind louvers with active ventilation. The two cottages are designed as three-story structures on the interior courtyard side but present as two-story buildings facing Georgia Terrace, with front porches oriented toward the street.

Mr. Krekelberg compared the current PUD proposal to the previously approved 2022 plan, noting the following improvements: the lodge is smaller (24 guest rooms vs. 42), 10 feet shorter, and 10 feet further from the east property line; the driveway and garage entrance have also shifted 10 feet west; the overall building footprint is reduced, yielding more open space; cottage mechanical units are sunken between the two cottage buildings; and the configuration creates an outdoor courtyard gathering space between the lodge and cottages.

Commission Questions and Discussion

Geology and excavation: Commission Member Eleanor James asked whether the previously anticipated blasting for parking garage excavation would still be required under this revised plan. Mr. Krekelberg explained that geotechnical test pits have indicated rock at approximately 12 to 13 feet depth, though prior drilling revealed a mixture of boulders and

soil rather than solid bedrock. He stated that MRA considers blasting a last resort and that other methods — including hydraulic expansion and drilling — would be explored first, in consultation with neighbors.

Building height perception: Commission Member Bill Tucker asked about the practical, line-of-sight perception of the building's height from Assembly Drive. Krekelberg acknowledged that while the measured average grade calculation yields 39.5 feet, the perceived height from the lowest point of the garage door to the ridge could exceed 40 feet on the downhill side, though the uphill face would appear considerably shorter. He indicated he could provide that specific figure upon request.

Parking calculation: Mr. Tucker raised a question about the applicability of MZO Section 702.4 as the parking baseline, versus the use-specific requirements in Sections 702.12 and 702.13. Mr. Krekelberg confirmed that by adopting the per-square-footage approach, the Commission is accepting that method specifically for this PUD, not as a general interpretation of the MZO. The approach would yield a minimum of 21 spaces for the lodge (based on 21,000 square feet of gross-floor area) and 5 spaces per cottage, for a total of approximately 31 new spaces across the new buildings, with existing parking remaining for the three current lodges.

Parking maximum and future control: Commission Vice-Chair Clay Hamilton asked whether the PUD establishes a maximum number of parking spaces to prevent future expansion. Attorney Freeman clarified that the site plan governs what is permitted, and that any substantial change to the parking configuration would require the applicant to return to the Commission for an amendment. This point was confirmed by both the applicant and staff.

Permitted uses and the IR district list: A substantial portion of the discussion focused on the inclusion in the PUD application of all permitted uses currently allowed in the IR district. Several Commission members expressed concern that listing these uses — including swimming pools, multi-unit dwellings, educational facilities, libraries, and others — while simultaneously stating that only what is shown on the site plan could be built without amendment, created confusion and potential inconsistency.

Commission Member Tucker noted that the PUD definition itself states it "replaces the existing zoning district," and questioned why all IR uses would remain theoretically intact in a new, independent zoning district. Mr. Krekelberg responded that MRA and Altura sought to maintain continuity with surrounding IR-zoned parcels and to avoid devaluing the property by removing uses that are currently permitted. Mr. DuBose added that the PUD process — by requiring town approval for any substantial change to the site plan — effectively gives the town far greater control over the property than the current IR zoning does, under which large-scale multifamily development (estimated at up to 114,000 square feet) could be built today with no Commission review.

Commission Member Mike Broussard summarized the exchange succinctly: under current IR zoning, a swimming pool could be built immediately with no town oversight; under the PUD, any such addition would require the applicant to return to the Commission for approval.

Attorney Freeman confirmed that the site plan governs what is allowable in the PUD district, and that state law and the MZO would require any substantial change — including changes to use, footprint, or parking — to come back before the Commission in a new hearing. He indicated he was confident staff could draft language to make this control mechanism clearer, even if the current application text was ambiguous on the point. Chair Schell and Commission Vice-Chair Hamilton both requested that clarifying language be added to the

plan stating explicitly that retained IR uses not depicted on the site plan would require Commission approval before being executed.

Mr. DuBose agreed to the addition of such clarifying language. He further offered a principled explanation for why IR uses were retained: the MZO itself allows these uses, and the PUD was pursued precisely because it achieves greater town control compared to leaving the property in IR zoning. He noted that if certain uses were individually removed, it would raise the question of why the existing commercial use of the site as a lodge had never been formally recognized as a use by right.

Hotel versus lodge: Vice-Chair Hamilton asked Mr. DuBose to explain the distinction MRA draws between a lodge and a commercial hotel. Mr. DuBose explained that MRA primarily hosts groups — conferences, retreats, and church programs — rather than individual travelers and does not operate with a 24-hour front desk or market to general tourists. Mr. Tanner Pickett noted the difference in staffing model as well. However, both Mr. Krekelberg and Town Attorney Brandon Freeman acknowledged that under the MZO, a lodge is categorized as a hotel, requiring that term to be used in the application.

Commission Member Eleanor James raised the concern that if MRA were ever to cease operations and the property were sold, the hotel designation in the PUD would make the property available to a commercial hotel operator. Mr. Pickett and Mr. Freeman confirmed this was technically accurate, but Mr. Freeman reiterated that any change to the site plan beyond what is currently depicted would require a new hearing before the Commission. Mr. DuBose further noted that from a commercial developer's perspective, a multifamily residential use would be a far more financially attractive acquisition target than a 24-room lodge with underground parking.

Landscaping and buffers: The Chair inquired about the vegetative buffer shown along the east property line and the treatment of existing trees along Georgia Terrace. Mr. Krekelberg indicated the MZO screening requirement can be met with a six-foot closed fence, but the PUD proposes vegetative buffers exceeding that standard, using a combination of shrubs and trees. Mr. DuBose noted that the cottages would be set back from Georgia Terrace in compliance with setback requirements, and that existing vegetation in the right-of-way is expected to be preserved to the extent possible. Ms. Baker confirmed that the Town's tree protection ordinance applies to any trees in the public right-of-way, requiring review by the tree board. Mr. Krekelberg confirmed that MRA is working with a civil engineer and landscape architect on a stormwater and landscape plan.

Recess

The Chair announced a 20-minute recess at approximately 11:50 a.m., with the public hearing remaining open.

Return from Recess and Membership Change

Upon return from recess, the Chair noted that Commission Member Allen Crawford had departed the meeting.

Motion to excuse Commission Member Allen Crawford from the remainder of the meeting was made by Commission Member Sally Jenkins and seconded by Commission Member Mike Broussard. The motion carried unanimously.

Motion to seat Alternate Member Gayle Sawyer as a voting member of the Commission for the remainder of the meeting was made by Commission Member Eleanor James and seconded by Commission Member Bill Tucker. The motion carried unanimously.

Attorney Freeman requested that Ms. Sawyer confirm she had heard the conflict-of-interest statement read earlier and had no conflicts to disclose. Ms. Sawyer, who had been present for the entirety of the proceedings, confirmed she had heard the statement and had no conflicts.

Commission Discussion, Continued

Following the recess, the Commission continued its discussion, focusing primarily on the interplay between the PUD site plan and the retained IR permitted uses.

The Chair sought formal affirmation that uses retained from the IR district but not depicted on the site plan could not be executed without amending the plan. Both Attorney Freeman and Ms. Baker confirmed this to be their understanding. Mr. Pickett reiterated that the PUD is intended to be more restrictive than the current IR zoning, not a mechanism to obtain additional uncontrolled flexibility.

Vice-Chair Hamilton pressed for clarity on why uses such as swimming pools are listed if they cannot be built without plan amendment, suggesting it would be simpler to omit them from the PUD entirely and require any future applicant to come forward and request them. Mr. Krekelberg responded that maintaining the IR district framework as the foundation of the PUD was intended to ensure legal continuity and preserve property value but acknowledged the Commission's concern about readability and clarity.

Mr. Freeman advised the Commission that what is being considered today is a planned unit development for the specific buildings and uses shown on the site plan, and that the IR use list, while potentially confusing, does not change the core purpose of the application. He expressed confidence that clearer language could be drafted for the recommendation to the governing board.

Mr. DuBose offered a substantive policy observation: the same underlying questions about scale, design compatibility, and permitted use that have surrounded the development of this property for years have always been present under the IR district — yet many of those uses, including large-scale multifamily development, have never required community review. He argued that the PUD, by requiring amendment approval for any change to the site plan, gives the town a meaningful level of oversight it does not currently have under IR zoning.

The Commission acknowledged this point, with Mr. Tucker summarizing the dynamic: the PUD replaces the existing zoning district and governs the property by the site plan, meaning the town gains a review mechanism for any future change that does not exist today.

Vice-Chair Hamilton raised a final clarifying question regarding existing buildings: he confirmed with Attorney Freeman that routine maintenance or repair of the existing structures that remain within their current footprint would not require a return to the Commission, but that any expansion, relocation, or substantial change in use would.

Mr. Broussard offered a succinct synthesis for the record: under current IR zoning, a swimming pool or other permitted use could be built immediately without Commission review; under the PUD, any such addition requires prior Commission approval. Mr. DuBose confirmed this was correct.

Vice-Chair Hamilton, requested that the site plan depict parking space locations with specific numbers to provide greater transparency, noting that while references to counts were made

during the presentation, the plan itself did not clearly identify where different parking areas are and how many spaces each contains.

Stormwater Management

Mr. Krekelberg addressed concerns about stormwater, explaining that the project's stormwater system is designed in accordance with the Montreat stormwater management ordinance, which requires structural measures to control and treat the difference in stormwater runoff volume between pre- and post-development conditions for a minimum one-year, 24-hour storm event as determined by NOAA data for Black Mountain. Mr. Krekelberg noted that because the site includes pre-existing impervious surfaces and buildings, the calculation is a net increase — consistent with how parking calculations are handled under the Montreat Zoning Ordinance (MZO).

Commission Vice-Chair Clay Hamilton raised concern about offsite drainage flowing from the hillside across Georgia Terrace onto the relatively flat project site. Mr. Krekelberg acknowledged that stormwater flows onto the parcel from outside the property and confirmed that the engineering was designed to address that. Interim Zoning Administrator Alexis Baker noted that disturbance of more than 10,000 square feet triggers a requirement for professional engineering of the stormwater system, and that an operation and maintenance agreement must be recorded with the Buncombe County Register of Deeds. The applicant confirmed the system had been engineered and met ordinance requirements. Richard DuBose noted that the organization is exploring whether the system's capacity could be enhanced beyond the minimum requirement, though cost and feasibility remained uncertain.

Vegetative Buffer and Screening

Commission Member Eleanor James engaged in extended discussion regarding the required screening between the proposed lodge and the adjacent residential property. She questioned how a required vegetative buffer could be established in the same area as the proposed drainage swale along the east property line, noting that swales and tree roots are generally incompatible. Mr. Krekelberg acknowledged that existing trees in that zone would be affected by the creation of the swale but stated that new vegetation could be planted within the buffer area once the terrain is modulated. Mr. Krekelberg further noted that existing trees might have roots at the surface, making the swale construction a necessary first step.

Commission Member Eleanor James pressed for specificity on the location and character of the required screening, referencing the MZO requirement for a six-foot fence or equivalent vegetative buffer between unlike land uses. Mr. Krekelberg responded that flexibility within the ordinance allows for the fence or screening to be located in various positions within the 30-foot area and suggested the Commission could add a condition specifying the location if desired. Richard DuBose stated publicly that MRA would be willing to work with neighboring property owners to ensure satisfaction with the buffer, and acknowledged that factors such as plant size, survivability, and long-term appearance all bear on its design.

Chair Julie Schell confirmed that the vegetative buffer is depicted on the plan and would therefore be required as part of any approval. Commission members indicated a preference for more descriptive language regarding the buffer's anticipated height and character.

Architectural Renderings and Design Standards

Vice-Chair Clay Hamilton asked whether the conceptual architectural renderings presented would be binding, and whether any anticipated design changes might require the applicant to return to the Commission. Zoning Administrator Baker clarified that the renderings are not part of the formal application and were presented for informational purposes only. Town

Attorney Brandon Freeman stated that the level of design detail included in a PUD application is an applicant's choice. Richard DuBose explained that the drawings were part of the original application but were subsequently withdrawn because including them could be construed as binding design standards, which could require the applicant to return for approval of any deviation.

Commission members noted that the PUD's references to "design" in the ordinance pertain primarily to site layout — the relationship of buildings to one another, density, and overall site organization — rather than to architectural aesthetics. There was consensus that the Commission has limited authority to impose architectural standards absent a historic overlay or similar designation.

Pending Legal Matter / Concurrent SUP Appeal

Commission Member Mike Broussard inquired about the status of the previously approved Special Use Permit (SUP), which had been approved by a prior commission, subsequently rejected by a local court, and is currently on appeal. He asked which path MRA intends to pursue. Richard DuBose stated unequivocally that if the PUD is approved through the current process, MRA's plan is to proceed under the PUD. He noted that the SUP appeal would become a matter for attorneys, but that the PUD would be the operative plan for the property.

Public Comment

Speakers were reminded of the five-minute time limit.

Priscilla Hayner, 319 Assembly Drive, speaking as a representative of the Montreat Stewards — an organization of more than 1,300 community members — provided an overview of eight weeks of regular meetings between the Stewards and MRA leadership. She characterized those discussions as productive and positive, and credited MRA for meaningful improvements to the plan, including a reduced building footprint, a cottage-based design rather than a single large structure, a 10-foot setback increase from the east property line, and the relocation of the HVAC system to the basement. She stated that the Stewards do not oppose the application but have not yet received sufficient clarity on several specific concerns, and she outlined those concerns through a series of subsequent speakers.

Powell Jones, 314 North Carolina Terrace, addressed the Commission regarding trees and right-of-way boundaries. He observed that it remains unclear, even after consulting with town staff, precisely where the right-of-way ends and MRA's property begins along Georgia Terrace and Assembly Drive, including a 30-foot utility easement and mapped town green space containing significant trees and rhododendrons. He urged the Commission to require that these boundaries be clearly established before approval. He also requested that MRA mark trees intended to be saved with flagging tape and consult with an arborist prior to any final decision, noting that Article 904 of the MZO requires developers to make every effort to protect and retain existing trees. He suggested the tree board, planning staff, and the public all be given an opportunity to understand which mature trees would remain under the plan.

Kate Hayner, 319 Assembly Drive, addressed the Commission on best practices for tree preservation during construction. She reported that two independent arborists retained by adjacent property owners provided consistent recommendations, including protection of critical root zones with firm fencing and thick mulch, exclusion of all construction traffic and grading from those zones, and ongoing compliance monitoring. The arborists also recommended against paving the existing gravel road to protect tree roots in the green space

and suggested protective padding around tree trunks in the town right-of-way. She noted that one arborist identified trees on the MRA property not currently designated to be saved that might in fact be retainable, given their distance from the planned structures. She drew particular attention to a sugar maple on the adjacent property, estimated at 130 years old and described as the largest the arborist had seen, expressing concern about its preservation. She requested that the Commission allow additional time for MRA to clarify which trees can be protected before issuing a final recommendation, and that best management practices for tree protection be required as a condition of any approval.

Harry T. Jones, 300 North Carolina Terrace, addressed the Commission on Stormwater Management, framing his remarks in the context of Hurricane Helene, which he noted caused an estimated \$11 million in damage to the town of Montreat. He expressed concern that current stormwater standards do not reflect the lessons learned from that event, and presented three recommendations from the Montreat Stewards: (1) that the capacity of the stormwater management system be enhanced to protect against a two-year, 24-hour storm event rather than the minimum one-year standard; (2) that impervious surfaces, particularly south of the existing rental buildings, be replaced with permeable materials consistent with the planned roundabout area; and (3) that the landscaping plan prioritize large trees for long-term erosion and stormwater control, rather than relying on low-level vegetation.

Margaret Berry, 314 North Carolina Terrace, addressed the Commission on matters of architectural design. She acknowledged broad community concern that the final building not depart from the character of Montreat and noted that the Stewards had engaged an architectural historian who participated in a meeting with MRA's architect. She described that meeting as largely positive and stated that MRA has accepted some of the consultant's recommendations. She asked that the Commission help ensure the final construction is substantially consistent with the architectural renderings that have been publicly presented, and that design suggestions aimed at softening the visual impact of the main building's 159-foot width be incorporated. She noted that preserving existing trees along the street frontages would help maintain the vegetated character that defines the entry into Montreat.

Kelly Kimball Moisand spoke on behalf of her parents, Dr. Millard and Sandra Kimball, owners of 316 North Carolina Terrace, who were unable to attend due to health concerns. She read a written statement expressing concern about potential structural damage to their 110-year-old home, which is supported by a 12- to 14-foot stone retaining wall on Georgia Terrace directly across from the proposed cottages. The statement raised concerns about excavation and possible blasting during construction causing the retaining wall to shift or fail and requested written assurance from both the town and MRA that their property would be protected from construction-related damage. The written statement was submitted to the Commission for inclusion in the official record. Ms. Moisand also raised the issue of parking displacement, noting that MRA staff currently park on the project site while working from the Heritage Foundation building, and that once construction begins, those vehicles will have no designated parking and may displace residents on Georgia Terrace and North Carolina Terrace.

Rusty Douglas, 227 Alabama Terrace, expressed concern about the extent of land disturbance, noting that the application proposes disturbing approximately 1.7 of 2.1 acres — roughly 80% of the site. He questioned what would be different about the new stormwater plan compared to the prior plan, which he recalled a stormwater expert had testified would be an "abject failure" during the previous quasi-legal proceeding. He also questioned the reference to a potential swimming pool, noting that preserving property value is generally not

a mission objective of MRA, and suggested that the devaluation of neighboring residential properties had not received adequate consideration throughout the lengthy approval process.

David Evans, 138 Mississippi Road, Chair of the Montreat Wilderness Committee, spoke in support of the application. He emphasized that MRA has placed thousands of acres in conservation easements and manages Robert Lake Park as a community resource. He objected to any suggestion that MRA has been an inadequate environmental steward and expressed confidence in the organization's commitment to responsible development.

Monroe Gilmour, 94 Penland Cove Road, Black Mountain, spoke as a longtime community member with family roots in Montreat. He commended both the Commission and MRA for the progress made in narrowing the differences between the applicant and community members and encouraged all parties to continue incorporating input from the Montreat Stewards. He also asked that the distinction between a "lodge" and a "hotel," which Vice-Chair Hamilton had earlier articulated, be incorporated clearly into any final approval language.

Martha Campbell, 149 Maryland Place, spoke in support of the application. She recalled earlier eras of significant change in Montreat — including the renovation of the Assembly Inn, replacement of the old maintenance building, and other improvements — and characterized this project as a continuation of thoughtful institutional investment. She affirmed that additional guest housing is essential to MRA's ministry programming and expressed confidence that the application is thorough and well-considered.

Chip Legerton, 222 Eastminster Terrace, Chairman of the MRA Board of Directors, offered closing remarks on behalf of the board. He described the project as a "win-win-win" for the conference center, neighboring property owners, and the town. He noted that what MRA could build "by right" under current zoning would be far less compatible with neighborhood character than the proposed PUD, and that the PUD framework restricts MRA's use of the property. He committed on behalf of the board to doing everything possible to maintain conservation principles, manage stormwater responsibly, protect trees, and build a structure consistent with Montreat's character. He acknowledged the complexity of balancing competing interests and expressed appreciation for the community's willingness to engage constructively throughout the process.

Following the close of public comments, Chair Schell summarized the major themes that had emerged across the hearing and invited the Commission to deliberate.

Chair Schell identified seven areas requiring further clarification or action before a recommendation could be made:

- Clarification of IR (Institutional Recreation) uses listed in the development standards but not depicted on the PUD master plan — specifically, whether those uses could be exercised without a return to the Commission.
- Vibration-based construction methods (including potential blasting or heavy mechanical excavation) and protections for neighboring properties.
- The vegetative buffer on the north/east side — requesting more specific description of species, height, and placement relative to the drainage swale.
- Tree protection plans, including trees within the right-of-way and the delineation of trees to be saved versus removed.

- Architectural renderings — while acknowledged as outside the formal application, the Commission sought to understand how design compatibility with neighborhood character would be ensured.
- Stormwater management — whether additional capacity or enhanced standards beyond the minimum ordinance requirement, could or should be incorporated.
- Parking congestion — Commission Member James urged MRA to pursue the maximum number of on-site parking spaces (up to 26, rather than the currently planned 21) to reduce spillover onto adjacent residential streets.

On the question of the IR uses, the applicant's team clarified that any use not depicted on the PUD master plan would require a formal amendment to that plan before it could be pursued. Richard DuBose affirmed that MRA is fully prepared to add clarifying language to the application making this explicit and expressed no objection to doing so. Town Attorney Freeman confirmed that any recommended conditions should ideally be agreed to by the applicant.

On vibration-based construction, Town Attorney Freeman advised that construction methods are generally regulated through the building permit process rather than the zoning entitlement stage, and that this subject may be somewhat outside the Commission's purview. However, he indicated that a condition affirming the applicant's duty to construct reasonably, follow all applicable building codes, and provide advance notice to neighbors prior to any disruptive construction activities would be appropriate and defensible. Commission Member Broussard specifically requested that neighbors receive advance notice before any use of explosives.

On the landscaping and tree protection topics, Commission Member James expressed discomfort approving the PUD without a more detailed landscape plan, stating that the current language is too vague. Vice-Chair Hamilton and Member Sally Jenkins both acknowledged the legitimacy of the concern while noting the difficulty of enforcing specific design aesthetics. Town Attorney Freeman advised that a landscape plan is generally addressed at the building permit stage, and that the Commission should be thoughtful about the distinction between what it can recommend and what it can enforce. Vice-Chair Hamilton suggested that any conditions reference established standards or best management practices — such as those from a certified arborist — that MRA could be expected to document and follow.

The applicant's team indicated they could provide additional visual materials clarifying which trees must be removed due to building footprints and road alignments, and which could potentially be retained. Richard DuBose stated the applicant would work with town staff to update the application with clarifying language and supporting graphics prior to the next meeting.

Recognizing that additional time was needed to allow the applicant to respond to the Commission's questions and update the application, and that the Commission's zoning administrator had a hard stop at 3:00 PM, Chair Schell moved to continue the public hearing and deliberations to a date certain.

Motion to continue the public hearing and discussion on the MRA Planned Unit Development zoning request to Thursday, August 6, 2026 at 10:30 AM was made by Commission Member Eleanor James and seconded by Commission Member Mike Broussard. The motion carried unanimously.

Zoning Administrator Updates

Interim Zoning Administrator Alexis Baker provided a brief update on activity since her start on June 23rd. She reported that five exempt zoning compliance applications had been approved, covering minor repairs such as rotten deck posts, retaining wall repairs, and changes in driveway materials between impervious surfaces. She noted that six additional applications are pending and require supplemental information. She also reported one variance application scheduled to be heard by the Board of Adjustment on August 27, 2026.

Adjournment

Motion to adjourn was made by Commission Member Eleanor James and seconded by Commission Member Mike Broussard. The motion carried unanimously.

The meeting was adjourned at approximately 3:15 p.m. The next regular meeting of the Planning & Zoning Commission is scheduled for October 15, 2026. A special continuation meeting is scheduled for Thursday, August 6, 2026, at 10:30 AM.

Julie Schell, Chair

Angie Murphy, Town Clerk



Planned Unit Development District (PUD) for 309 Collegiate Circle

Proposed Project: Richard DuBose, applicant on behalf of property owner Mountain Retreat Association, has submitted an application for a Planned Unit Development (PUD), requesting a rezoning for 309 Collegiate Circle (PIN# 071096345100000) from I/R Zoning District to PUD Zoning District.

Created by:

Alexis Baker, AICP, CZO
Interim Zoning Administrator
Town of Montreat

Created for:

Montreat Planning & Zoning Commission
August 6, 2026

Staff Update Memo – August 6, 2026

The July 16, 2026, Montreat Planning & Zoning Commission public hearing was continued to August 6, 2026, to allow the applicant time to provide further information and clarification.

The applicant provided the following documents:

1. A letter responding to issues raised at the Planning and Zoning Commission.
(Packet Pages 19-20)
2. An updated PUD Master Plan dated 29 July 2026 with additional information highlighted in yellow, related to by-right uses and vegetated buffers. (Packet Page 21)
3. Updated Development Standards dated 29 July 2026, with new or deleted information highlighted in yellow, including new or deleted by-right uses, the inclusion of building facade drawings, and the allowance of minor changes to building size and siting. (Packet Pages 22-25)

In addition to the documents provided by the applicant, information provided by the applicant and the public at the July 16th public hearing and the original staff report are attached.

Attachments:

1. Updated Information from Application
 - a. A letter responding to issues raised at the Planning and Zoning Commission.
(Packet Pages 19-20)
 - b. An updated PUD Master Plan dated 29 July 2026. (Packet Page 21)
 - c. An Updated outline of the Applicant's proposed Development Standards dated 29 July 2026. (Packet Pages 22-25)
2. Additional information from the applicant and public
 - a. Applicant Presentation (Conceptual Architectural Renderings). (Provided by Applicant, Packet Pages 27-39)
 - b. J.M Teague Traffic Study Memo. (Provided by Applicant, Packet Pages 40-43)
 - c. Public Comment Documents. (Packet Pages 44-51)
3. July 16, 2026, Staff Report. (Packet Pages 52-76)

Attachment 1

Montreat Lodge - Planned Unit Development District
Seven Themes and One Clarification
30 July 2026

MRA proposes the following responses to the Seven Themes raised by the P&Z Commission during its July 16th meeting, acknowledging that these proposed changes and supplemental documents are also subject to the approval of the MRA Board of Directors, which MRA hopes to receive by the August 6th meeting.:

1. Uses Not Shown On The PUD Master Plan

- MRA proposes the deletion of the following Permitted Uses-by-Right from the PUD Development Standards:
 - Family Care Homes
 - Home Occupation
 - Studios
 - Swimming Pools, Private
 - Auditorium
 - College
 - Library, Public
 - Municipal Government Facilities
 - Museums, Public
- MRA proposes the addition of the following language to the PUD Master Plan: "All Buildings Can Be Used for All Permitted Uses-by-Right in the PUD Development Standards".
- **Please let us know if the Town sees any issues with this language.**

2. Construction Vibration

- During the next P&Z meeting, MRA proposes stating the following: "It is possible that large boulders may require removal. All measures for quieter and less dynamic removal will be taken to avoid blasting - which would in any case require a special permit; any such decision would be taken in consultation with the community so that all are fully informed."
- **Please let us know if the Town sees any issues with this language.**

3. East Boundary Buffer

- MRA proposes the addition of the following language to the PUD Master Plan: "Boundary Buffer: six foot (6') high evergreen vegetation of sufficient density to serve the purpose of a solid fence".
- **Please let us know if the Town sees any issues with this language.**

4. Tree Protection

- During the next P&Z meeting, MRA proposes stating the following: "MRA will submit a tree protection plan, when it applies for a Building Permit. All trees lying in public roadways, drainage-ways, building foundation sites, private driveways, paths and public walkways will be removed. MRA commits to a woodland site."
- MRA will present a DRAFT Tree Preservation Plan to the P&Z Commission, during the 6 August 2026 meeting.
- **Please let us know if the Town sees any issues with this language.**

5. Design

- MRA proposes the addition of the following language to the PUD Development Standards: "The Zoning Administrator shall determine whether drawings of the building facades, included with a request for a Building Permit, are substantially in conformity with the renderings, presented to the Planning & Zoning Commission on July 16th, 2026."
- **Please let us know if the Town sees any issues with this language.**

6. Stormwater Management

- During the next P&Z meeting, MRA proposes stating the following: "MRA will submit a stormwater management plan, when it applies for a Building Permit. The stormwater management systems will meet the requirements of the Stormwater Management Ordinance. Budget permitting, MRA will exceed these requirements."
- **Please let us know if the Town sees any issues with this language.**

7. Parking Congestion

- During the next P&Z meeting, MRA proposes stating the following: "MRA will provide a minimum of 21 parking spaces under the new lodge. MRA will endeavor to accommodate additional parking spaces under the new lodge."
- **Please let us know if the Town sees any issues with this language.**

PUD-Specific Language Required For Clarification

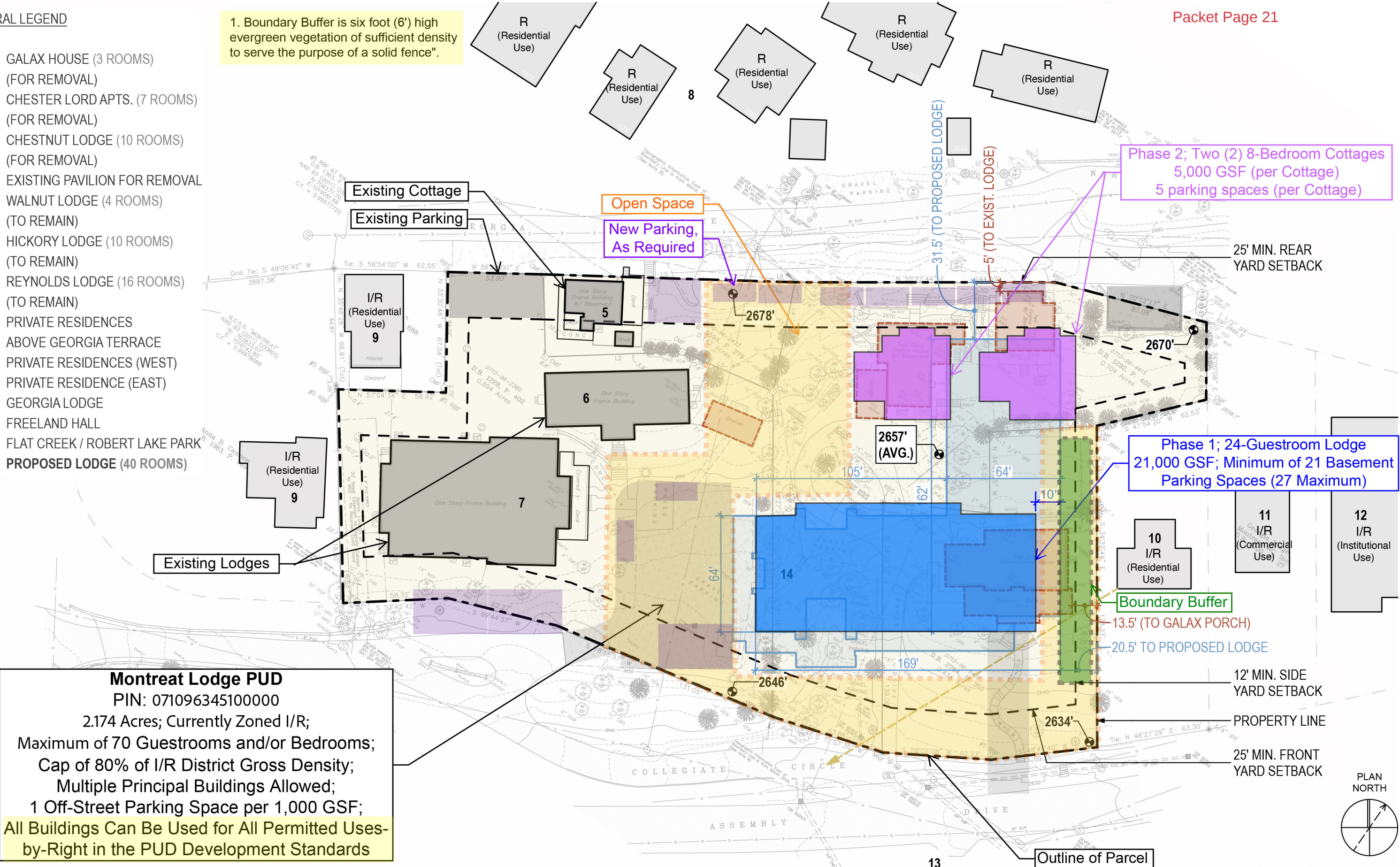
- MRA proposes the addition of the following language to the PUD Development Standards: "Minor changes in the location, siting or character of buildings and structures may be authorized by the Zoning Administrator, if required by engineering or other circumstances not foreseen at the time the final development program was approved; provided, however, that no change authorized by the Zoning Administrator under this section may increase the size of any building or structure by more than ten percent (10%), nor change the location of any building or structure by more than ten feet (10') in any direction, nor make any changes beyond the minimum or maximum requirements set forth in the PUD Development Standards or applicable standards of the MZO."
- **Please let us know if the Town sees any issues with this language.**

Notes:

1. Boundary Buffer is six foot (6') high evergreen vegetation of sufficient density to serve the purpose of a solid fence".

GENERAL LEGEND

- 1 GALAX HOUSE (3 ROOMS)
(FOR REMOVAL)
- 2 CHESTER LORD APTS. (7 ROOMS)
(FOR REMOVAL)
- 3 CHESTNUT LODGE (10 ROOMS)
(FOR REMOVAL)
- 4 EXISTING PAVILION FOR REMOVAL
- 5 WALNUT LODGE (4 ROOMS)
(TO REMAIN)
- 6 HICKORY LODGE (10 ROOMS)
(TO REMAIN)
- 7 REYNOLDS LODGE (16 ROOMS)
(TO REMAIN)
- 8 PRIVATE RESIDENCES
ABOVE GEORGIA TERRACE
- 9 PRIVATE RESIDENCES (WEST)
- 10 PRIVATE RESIDENCE (EAST)
- 11 GEORGIA LODGE
- 12 FREELAND HALL
- 13 FLAT CREEK / ROBERT LAKE PARK
- 14 PROPOSED LODGE (40 ROOMS)



Montreat Lodge PUD
PIN: 071096345100000
2.174 Acres; Currently Zoned I/R;
Maximum of 70 Guestrooms and/or Bedrooms;
Cap of 80% of I/R District Gross Density;
Multiple Principal Buildings Allowed;
1 Off-Street Parking Space per 1,000 GSF;
All Buildings Can Be Used for All Permitted Uses-
by-Right in the PUD Development Standards

Montreat Lodge - Planned Unit Development [PUD] Master Plan

29 July 2026 - Requires Approvals by P&Z and Town Commissioners - Meeting Date(s) TBD

ALTURA ARCHITECTS

Montreat Lodge - Planned Unit Development District
Development Standards
29 July 2026

Narrative:

Strict application of the I/R Zoning District regulations does not provide the flexibility MRA requires to develop this parcel now and into the future. This Zoning Map Amendment strengthens the long-term viability of Montreat's conference operations by creating a Montreat Lodge PUD District that is scaled to mission, respectful of neighbors, and structured for future flexibility. It protects open space, limits density, aligns residential and non-residential uses with surrounding zoning, and ensures that all future development is managed under a single, clear, and enforceable framework.

Variations from the following applicable I/R District regulations and standards are being requested:

- Multiple principal buildings are permitted, reducing the scale and impact of a single, large, combined building.
- Section 702.4 governs Off-Street Parking Space Requirements
 - The parcel combines lodging, cottage rental, and the activities of conferees, including dining, gathering, and meeting.
 - With a blend of Uses, Section 702.4 most aptly governs the Montreat Lodge PUD District's Off-Street Parking, simplifying the calculation of required spaces.
- Permitted Uses requiring added clarification:
 - Lodge is a Permitted Use-by-Right.
 - Conference Center is a Permitted Use-by-Right.

In return for greater flexibility in regard to a mix of various land Uses, the Montreat Lodge PUD District shall provide:

- Creative design in the layout of buildings, open space, and circulation
- Open space amenities for guests
- Compatibility with surrounding land Uses and neighborhood character
- Greater efficiency in the layout and provision of roads, utilities, and other infrastructure
- Environmentally sensitive development, conforming to the requirements of the Montreat Zoning Ordinance, Stormwater Management Ordinance, and Noise Control Ordinance
- Protection of health, safety, and general welfare without unduly inhibiting the development of the property
- Lower density, in the form of total building area being capped at 80% of what is permitted under the I/R district zoning
- Fewer bedrooms than complete build-out of the parcel as Multi-Family Dwelling(s)

Permitted Uses-by-Right in the Montreat Lodge PUD District:

- Public & Institutional: Conference Center
- Commercial: Lodge (Hotel)

Permitted Uses-by-Right in the Montreat Lodge PUD District (continued):

- All Permitted Uses in the I/R District, which include the following:
 - Single Family Dwelling
 - Two Family Dwelling
 - Multi-Unit Dwelling
 - ~~Family Care Homes (deleted)~~
 - Accessory Buildings or Uses
 - ~~Home Occupation (deleted)~~
 - ~~Studios (deleted)~~
 - ~~Swimming Pools, Private (deleted)~~
 - ~~Auditorium (deleted)~~
 - ~~College (deleted)~~
 - Educational Facility
 - ~~Library, Public (deleted)~~
 - ~~Municipal Government Facilities (deleted)~~
 - ~~Museums, Public (deleted)~~

Summary of Gross Density of Residential and Non-Residential Uses:

- Combined residential bedrooms and non-residential guestrooms shall not exceed 70 (140 beds).
- Open Space shall be a minimum of 20% of the total lot area, reducing the buildable area to 80%.

Development Standards:

- Refer to Sections 504.1 through 504.9 of the I/R District for Purpose, Use, and Lot requirements.
- Maximum Building Height is forty feet (40'), measured from the Average Natural Grade at the footprint of each principal building. All proposed Buildings, other than Single Family, must be approved by the authority having jurisdiction for fire code enforcement. Structures over thirty-five feet (35') in height will require special fire protection systems
- Refer to Section 702.4 for Off-Street Parking Space Requirements.
- Refer to Sections 504.12 and 504.13 of the I/R District for Screening and Sign Regulations.
- Separation between buildings shall not be required (except as may be required by the Building Code and/or Fire Code)
- Multiple Principal Buildings shall be permitted.
- Open Space Requirements:
 - Refer to the **PUD District Master Plan** for the proposed amount of open space.
 - No revisions, alternatives, and/or clarifications to the Town's adopted plans for greenways, recreation space, and open space are provided.
 - No conservation and/or preservation areas are provided.
 - No public recreation areas are provided.
 - Management and long-term maintenance of open space will be conducted by a private entity (the Mountain Retreat Association).
- Additional Landscaping and Buffers
 - Except as shown on the PUD District Master Plan, there shall be no variations from compliance with Article IX.
 - Refer to the **PUD District Master Plan** for the transition between the PUD and land Uses adjacent to the outer boundary of the PUD; these may include buffers, specific compatible land Uses, and/or other transitions; these boundary transitions may be varied over their length and/or width.

Submission Check List:

- Community Meeting was held on 9 April 2026.

Persons and organizations contacted; manner and date of contact:

On 6 April 2026, the MRA sent a notice of the Community Meeting to be held on 9 April 2026 in email correspondence (to over 22,000 subscribers), in a separate notice in the weekly Community Announcements (a weekly Montreat-area community announcement email put out by the MRA), and on its social media accounts.

Written report of the community meeting held on 9 April 2026

The community meeting was held at 4:00 p.m. in Upper Anderson Auditorium in the Melvin Center, located at 401 Assembly Drive, Montreat, NC 28757.

The presentation included an overview of the MRA Board of Directors' direction for the project, including the construction of a smaller 24-room lodge and the possibility of developing residential-style cottage facilities on the northern half of the parcel as an alternative to building the planned second wing of the lodge. Over 100 people attended the meeting in person, and an additional 200-plus viewers watched the meeting via livestream. A recording was made available online following the event.

The alternative of residential-style cottages was generally well received by those in attendance at the Melvin Center, and the MRA is therefore pursuing the approvals necessary from the Town to implement this plan.

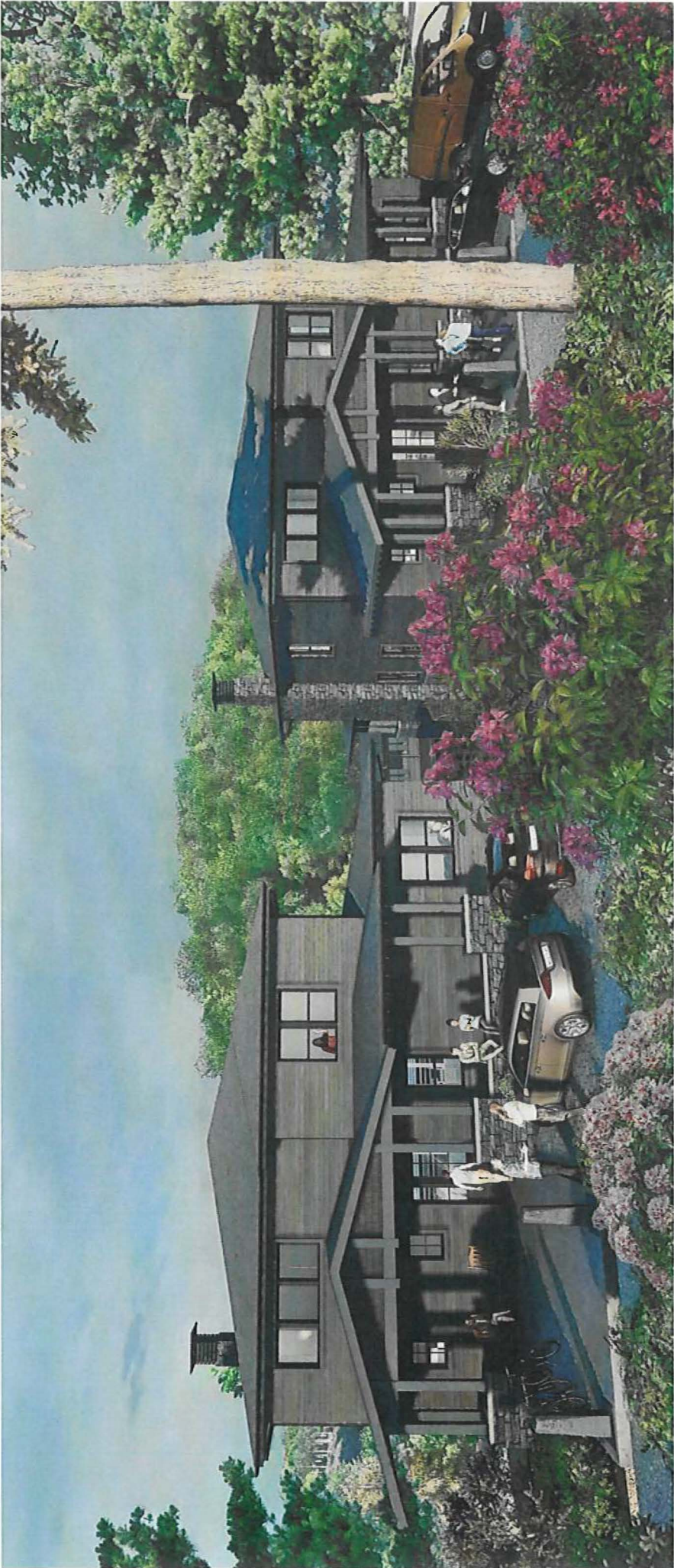
- Meetings with Neighbors (including Hayners, Joneses, and their attorney John Noor) was held on 5 May 2026.
Questions raised about building materials, setbacks, and other issues were discussed.
- *Additional subsequent meetings with neighbors and other interested citizens are being held, following the Community Meeting, and those discussions will continue.*
- Pre-Application Meeting with Town Staff was held on 14 May 2026.
 1. **PUD District Master Plan** includes the following:
 - a map, including parcel numbers, showing the parcels proposed for the PUD
 - a topographic map(s) for the property included in the proposed PUD
 - the locations of the proposed Uses
 - a map(s) showing the locations of water bodies appearing on USGS or NRCS Soil Survey maps within or adjacent to the boundary of the proposed PUD
 - a map(s) showing the locations of wetlands, stream Buffers, the 100 year floodplain, and slopes greater than 30%
 - a utility plan that includes the type and general location of the proposed public utilities
 - a plan addressing stormwater within the proposed PUD
 2. **PUD District Development Standards** include the following:
 - a list of permitted Uses proposed in the PUD
 - a summary of the gross density of those Uses proposed in the PUD
 - proposed land development standards/regulations for the PUD

3. Additional Requirements requested by the Town of Montreat:

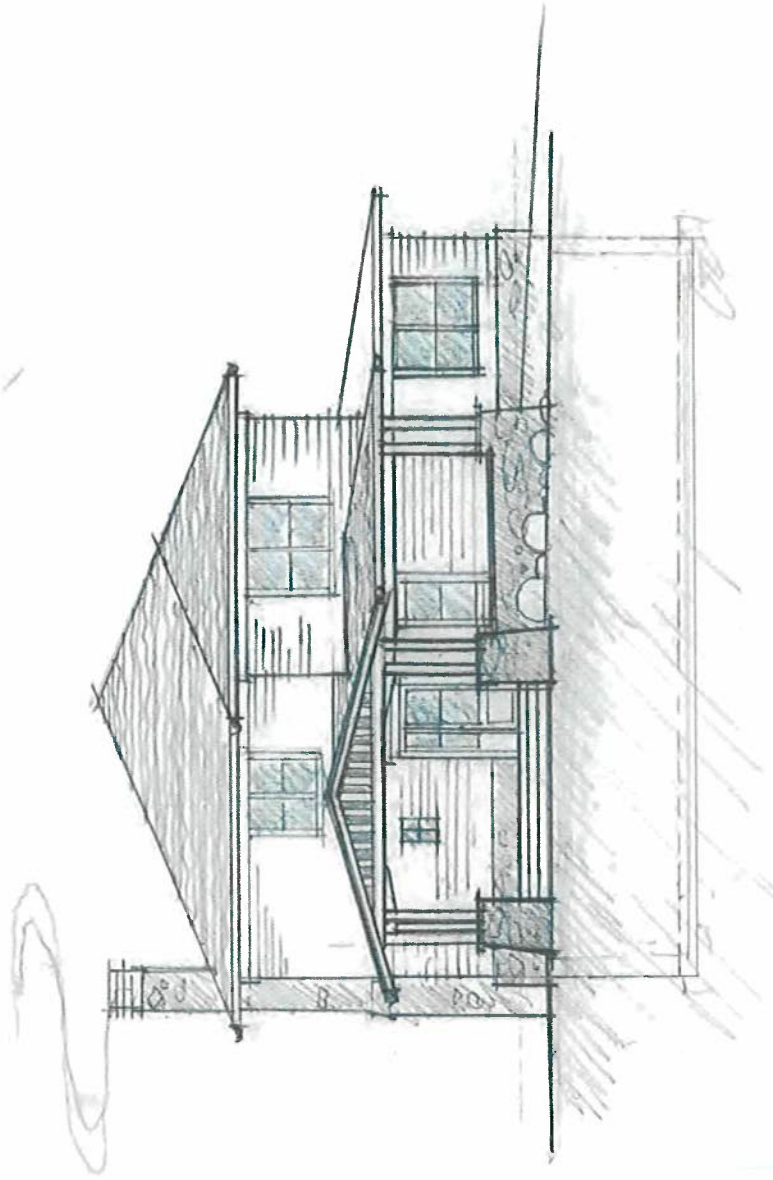
- a public service plan for the PUD that evaluates potential impacts on: police service, fire service, schools **(MRA will consult with the police chief and fire chief regarding potential impacts of the PUD District Master Plan.)**
- a multi-modal transportation plan for the PUD that includes the location of existing and proposed major roads in and adjacent to the PUD; to the extent practicable, the on-site transportation system shall be integrated with the off-site transportation system **(The PUD District Master Plan shows major roads adjacent to the parcel. The on-site paved areas are integrated with the off-site transportation system.)**
- a plan for an on-site transportation systems that addresses vehicular, bicycle, transit and pedestrian circulation **(Refer to the PUD District Master Plan for on-site transportation systems.)**
- the location of known historic Structures or sites within the PUD **(There are no historic structures on the parcel.)**
- a recreation and open space plan(s) that includes the locations and standards for open space and recreation areas within the PUD **(Refer to the PUD District Master Plan for delineation of open space.)**
- a boundary Buffer plan showing transition treatments between the proposed PUD and adjacent properties **(Refer to the PUD District Master Plan for transition treatments.)**
- a plan for development phasing within the PUD **(Refer to the PUD District Master Plan for development phasing.)**
- the Town Administrator or Board of Commissioners may require a Traffic Impact Analysis (TIA) to be conducted by the applicant and submitted as part of the rezoning application **(Refer to the Technical Memorandum, dated 8 October 2021, which states “the added trips do not reach the TIA threshold of NCDOT”. The scale of participation in Montreat Conference Center programs has not changed since 2021.)**
- topographic map for the property included in the proposed PUD **(Topographic elevations of the parcel range from 2630 feet to 2680 feet; refer to 309 Collegiate Circle – Topographic Map.)**
- a map showing the locations of water bodies appearing on USGS or NRCS Soil Survey maps within or adjacent to the boundary of the proposed PUD **(Flat Creek is adjacent to the boundary of the parcel; refer to 309 Collegiate Circle – Water Bodies Map.)**
- maps showing the locations of wetlands, stream buffers, the 100 year floodplain, and slopes greater than 30%; a utility plan that includes the type and general location **(There are no wetlands, streams, or floodplains on the parcel. The percent slope is 17.56 from www.mapwnc.org/find-slope-for-parcel; refer to 309 Collegiate Circle – Slopes Map.)**
- **The Zoning Administrator shall determine whether drawings of the building facades, included with a request for a Building Permit, are substantially in conformity with the renderings, presented to the Planning & Zoning Commission on July 16th, 2026.**
- **Minor changes in the location, siting or character of buildings and structures may be authorized by the Zoning Administrator, if required by engineering or other circumstances not foreseen at the time the final development program was approved; provided, however, that no change authorized by the Zoning Administrator under this section may increase the size of any building or structure by more than ten percent (10%), nor change the location of any building or structure by more than ten feet (10') in any direction, nor make any changes beyond the minimum or maximum requirements set forth in the PUD Development Standards or applicable standards of the MZO.**

Attachment 2

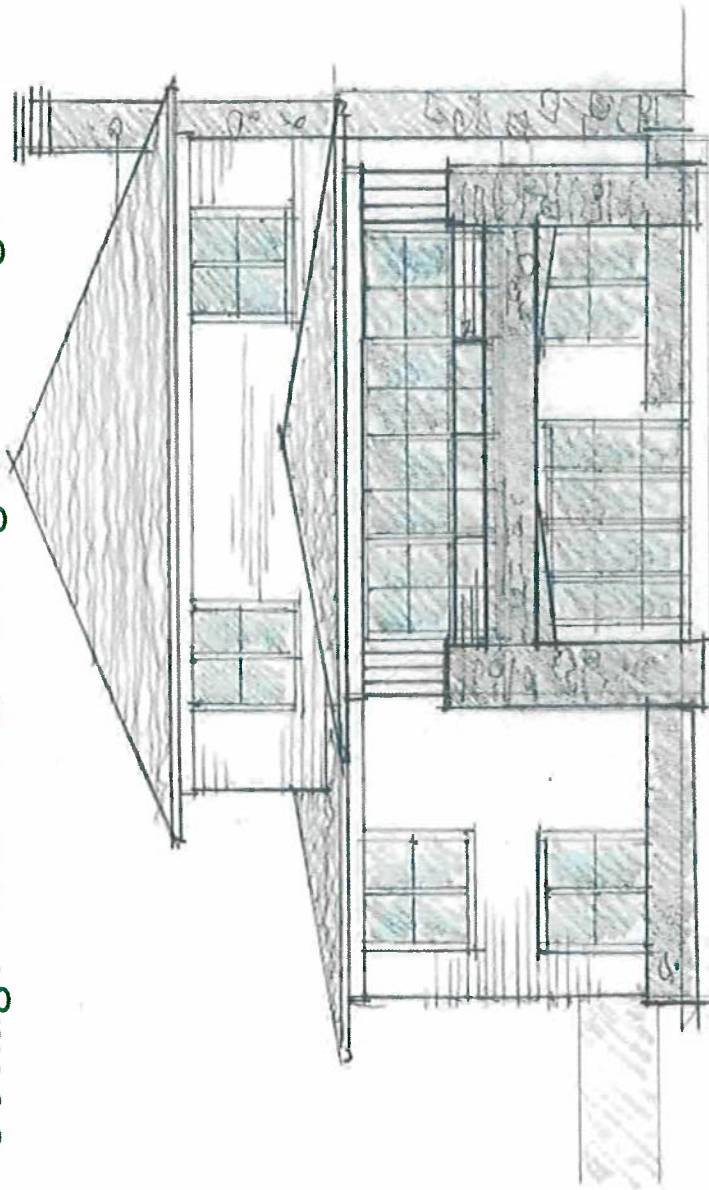
Applicant Presentation (Conceptual Architectural Renderings)



Street View Facing Georgia Terrace

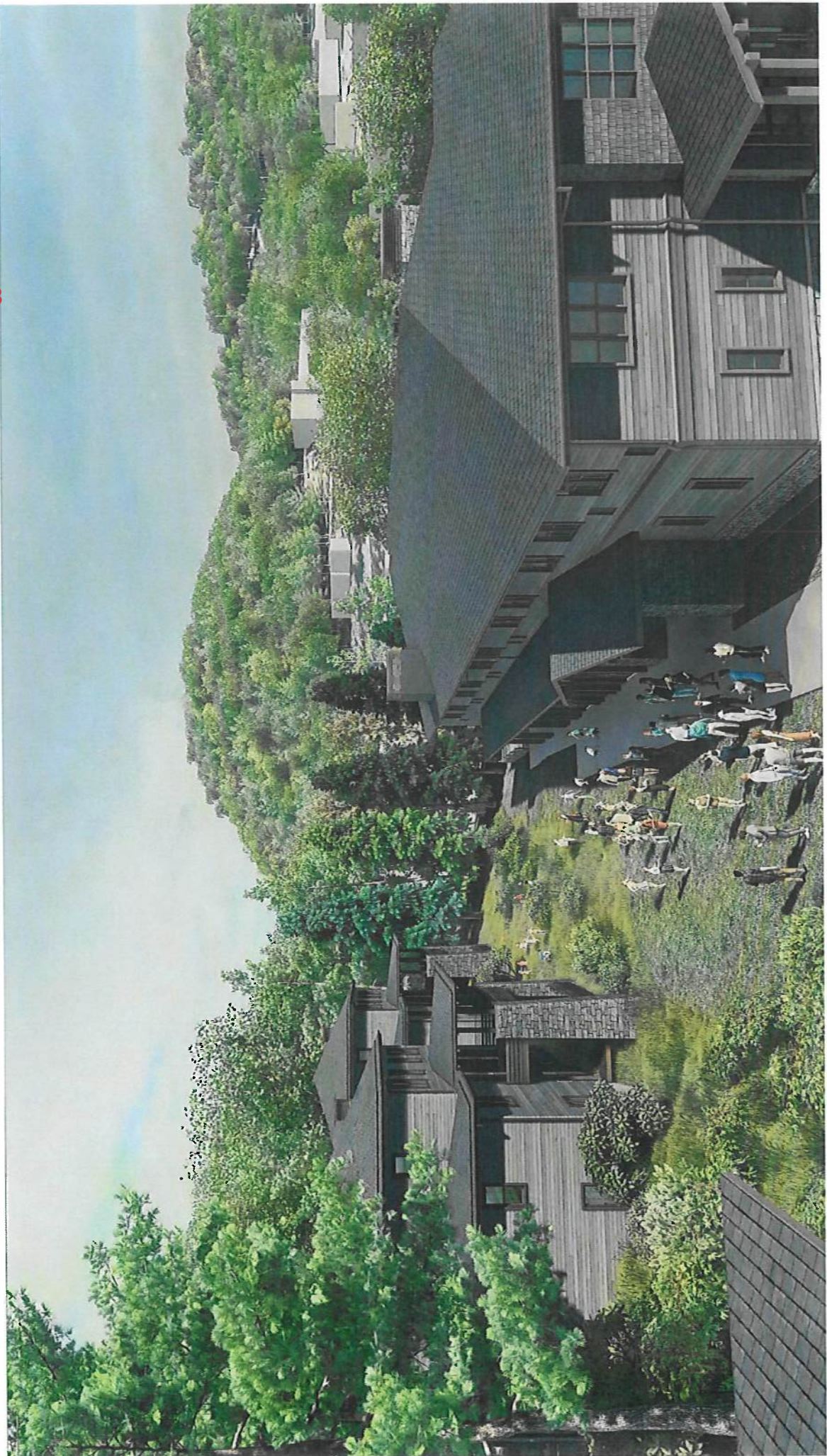


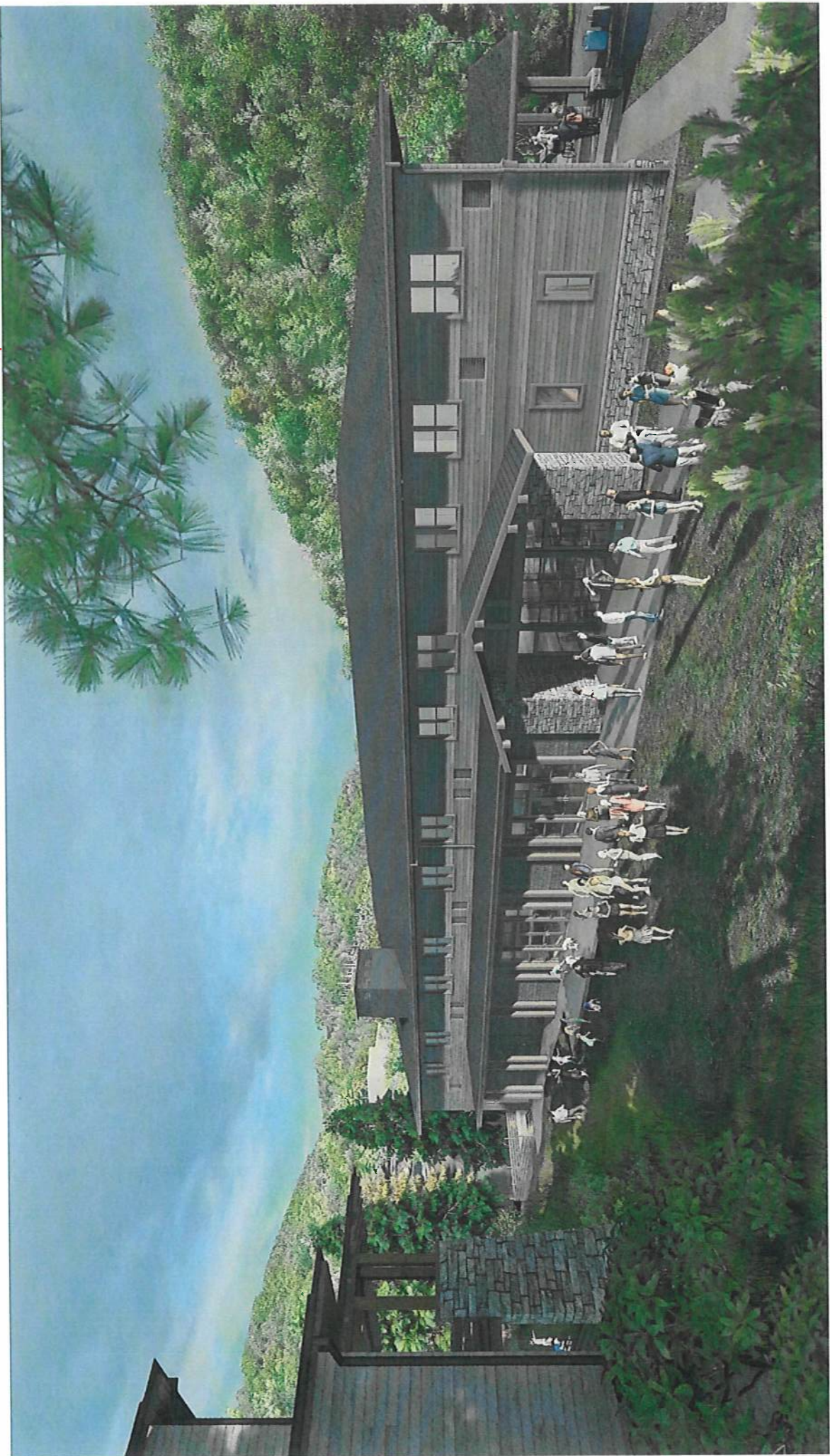
Cottage Rear View Facing New Lodge

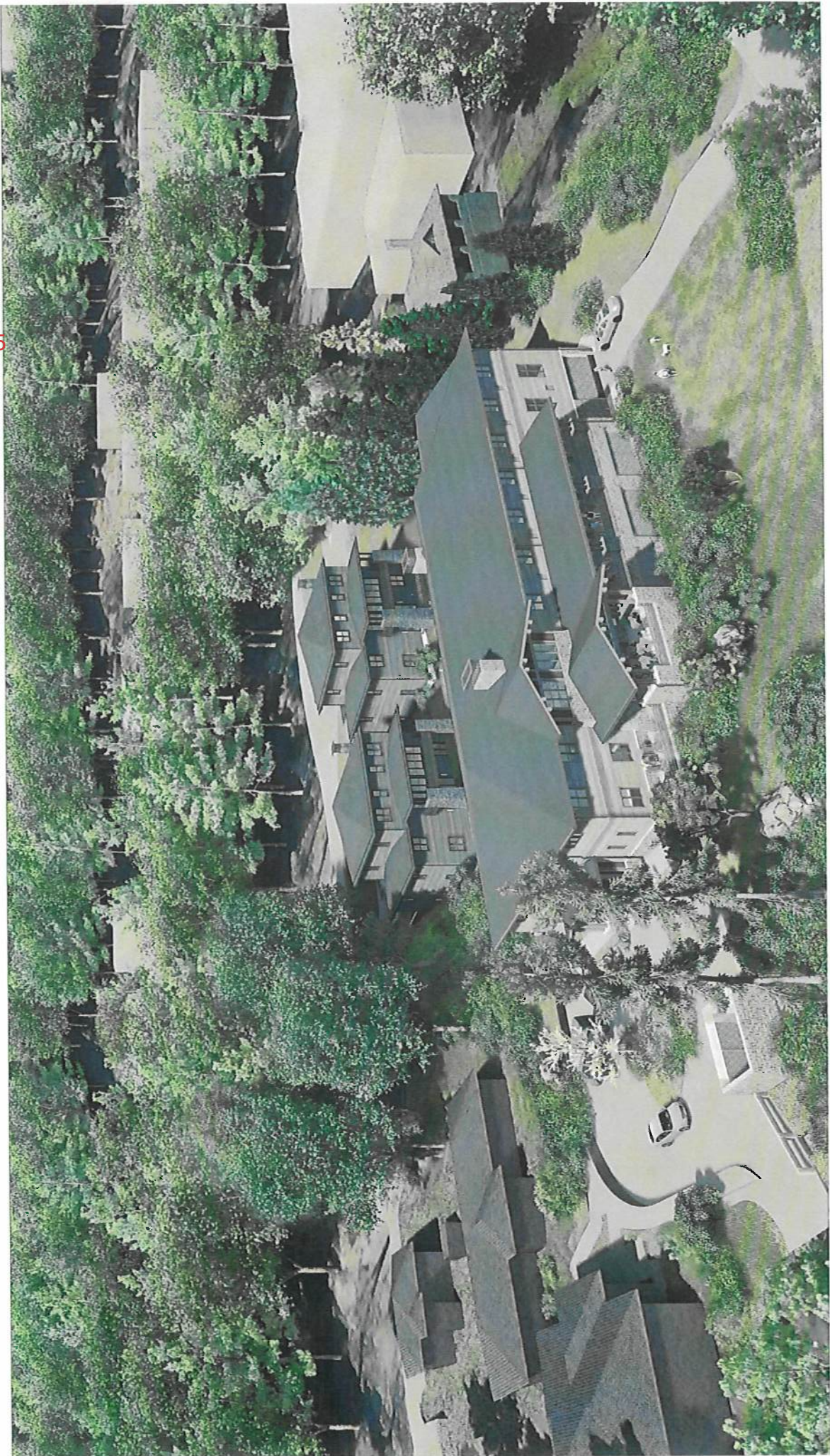






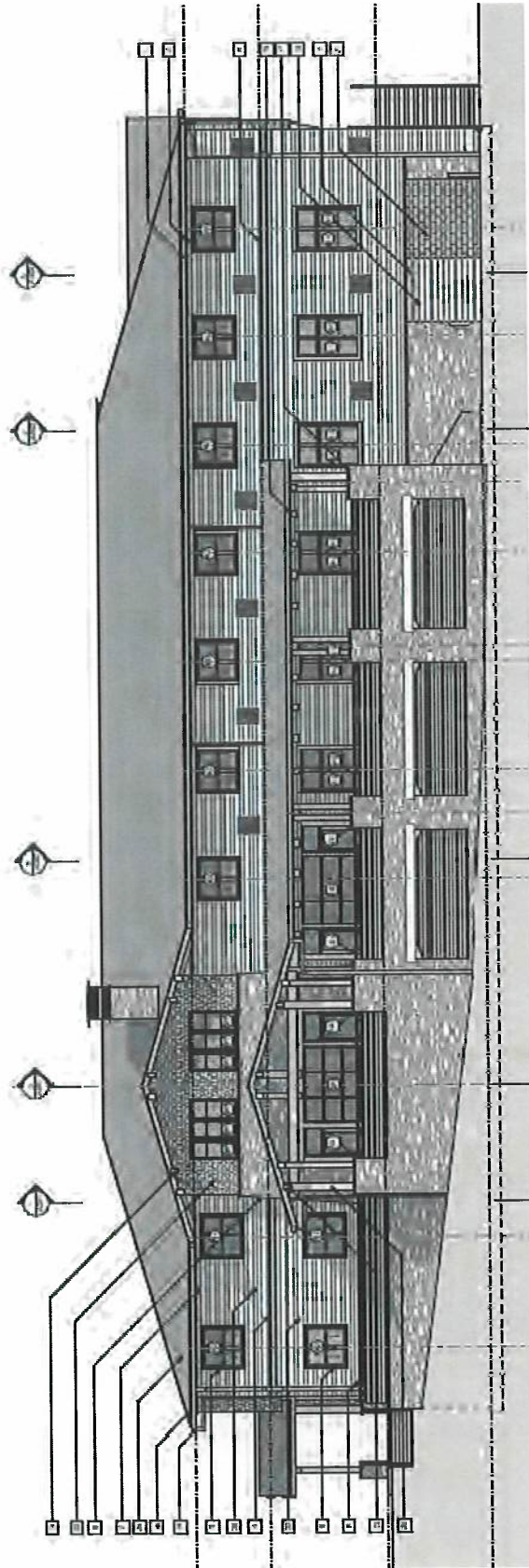




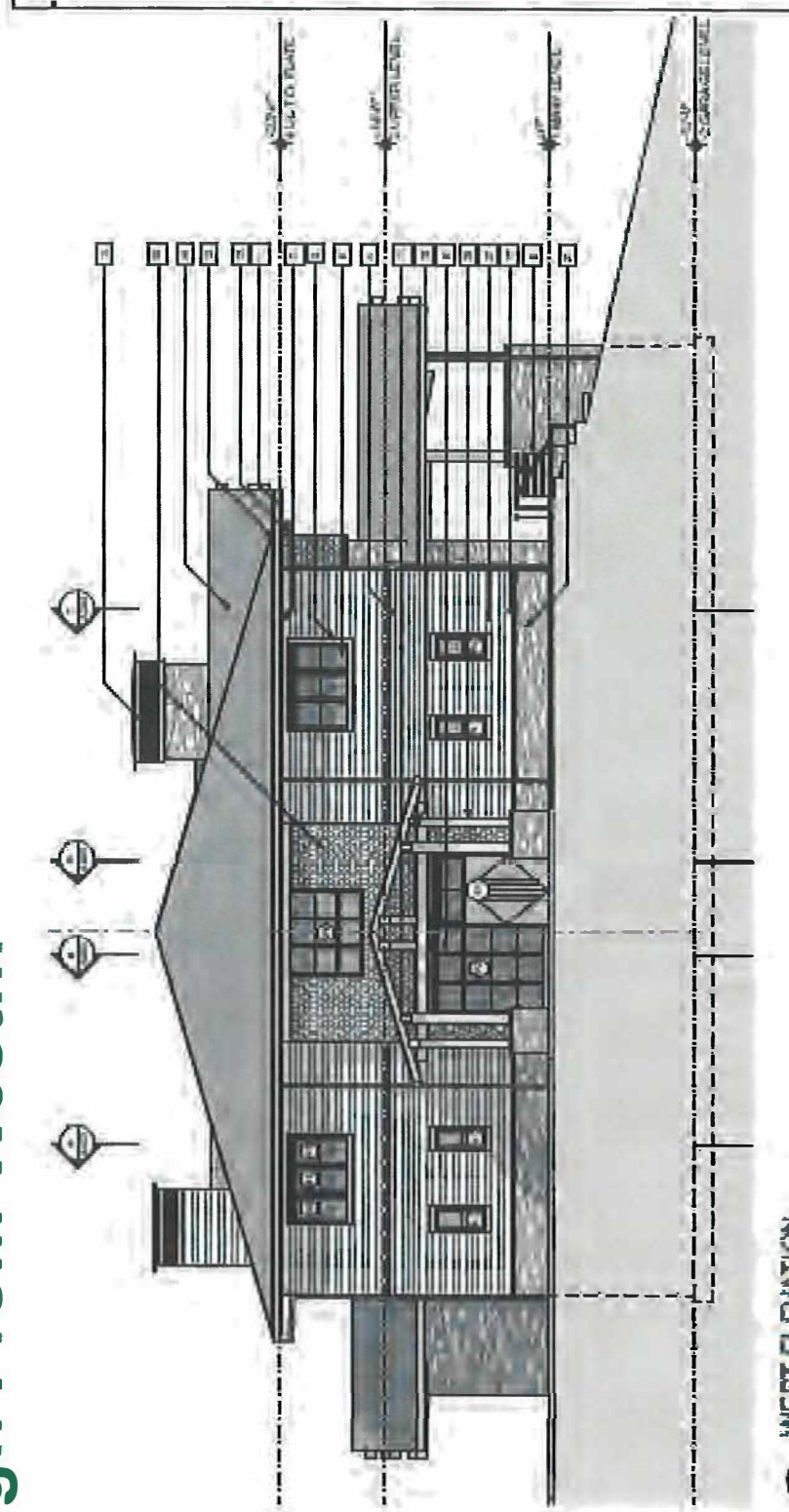




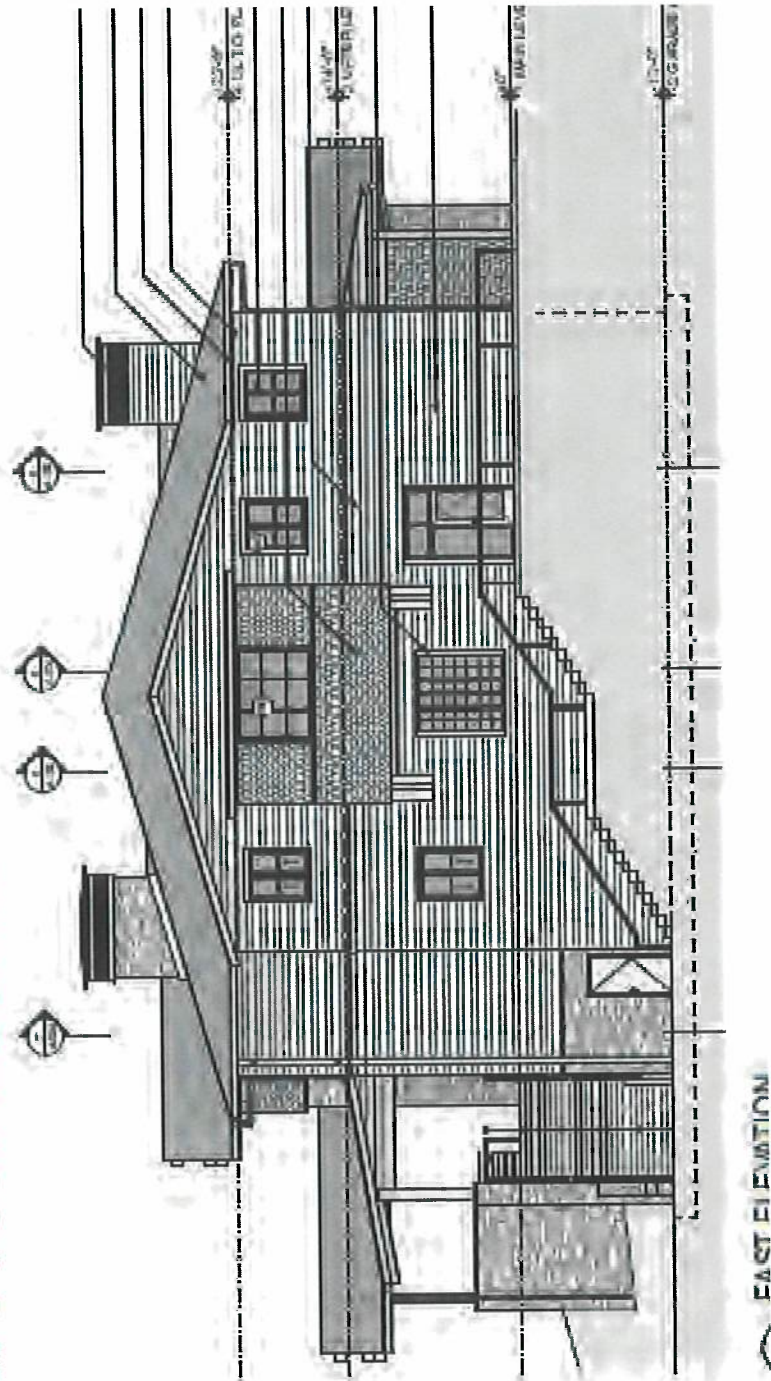
Design From Assembly Drive...



Design From West...



Design From East...



Applicant - J.M. Teague Traffic Study Memo



1155 North Main Street
Waynesville, NC 28786
(P) 828.456.8383
(F) 828.456.8797

www.jmteagueengineering.com

July 7, 2026
WAYN 1777

To: Mr. Robert Oast, Esq.
McGuire, Wood, & Bissette Law Firm
Drhumor Building
Asheville, NC 28801

From: Jeffrey H. Moore, P.E., Transportation Engineer
J.M. Teague Engineering & Planning

**SUBJECT: MOUNTAIN RETREAT ASSOCIATION LODGE EXPANSION TRIP
COMPARISON**

The purpose of this letter is to discuss the change, if any, in the expected number of trips expected to be generated by the proposed Mountain Retreat Association Lodge Expansion Project based on the difference from the original plan to the current Lodge Expansion plan. The Lodge Expansion Project is located at 309 Collegiate Circle in Montreat, NC.

McGuire, Wood, & Bissette Law Firm engaged J.M. Teague Engineering & Planning (JMTE) to review both the original and the revised site master plans for the Mountain Retreat Association Lodge Expansion and compare them to see if there will be a change in the number of trips that are expected to be generated by the project.

Under the permit submittal dated 7-15-2021, the original plan ("2021 Plan") showed the following:

- Demolish three (3) existing buildings and one (1) existing outdoor structure containing twenty (20) guest rooms.
- Construct one (1) building with forty (40) guest rooms and other guest facilities.
- Three (3) buildings would remain with thirty (30) rooms.
- The number of guest rooms would increase from the existing fifty (50) to the proposed number of seventy (70).
- There was to be a net gain of twenty (20) guest rooms.

Figure 1 shows the 2021 Plan.

While employed at Gannett Fleming, I prepared a technical memorandum dated October 8, 2021 to discuss the traffic conditions, including the number of trips expected to be generated by the Lodge Expansion Project shown in the 2021 Plan. The memorandum estimated the number of trips to be generated by the addition of the twenty (20) guest rooms to be forty-five (45) during a typical weekday and seventeen (17) on a typical weekend day. These trip volumes did not reach either the Town of Montreat or NCDOT thresholds for requiring a TIA.

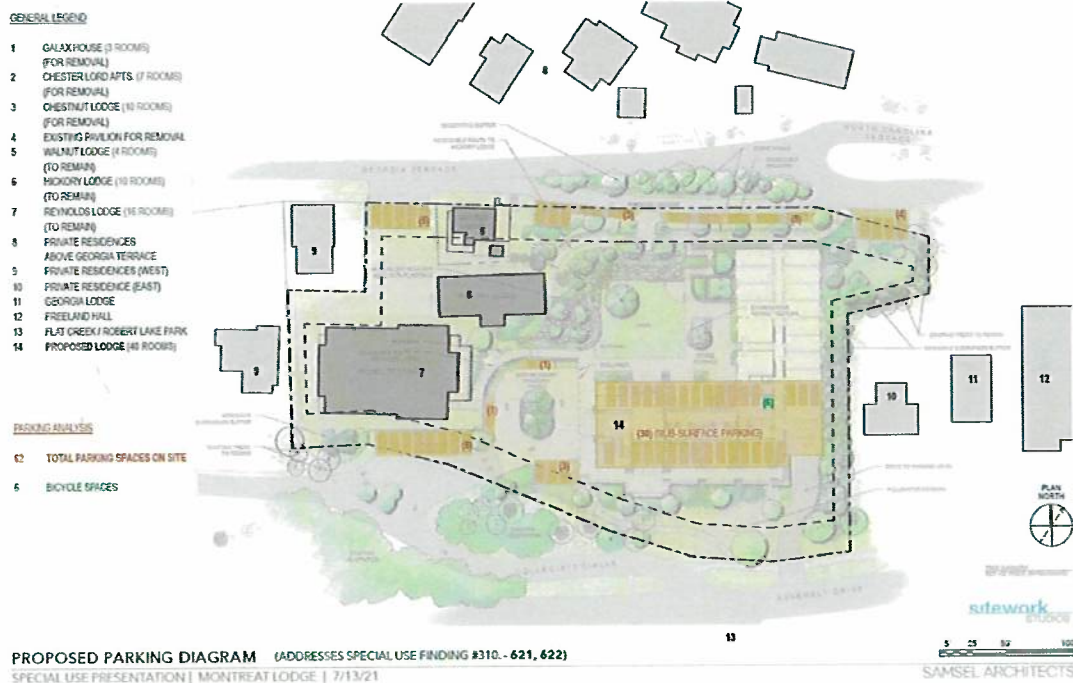


Figure 1: Lodge Expansion 2021 Plan (Source: Client)

The revised site plan dated 5-26-2026, ("2026 Plan") shows the following:

- Demolish three (3) existing buildings and one (1) existing outdoor structure containing twenty (20) guest rooms.
- Construct one (1) building with twenty-four (24) guest rooms and other guest facilities.
- Construct two (2) future guest room cottages with eight (8) guest rooms each.
- Three (3) buildings would remain with thirty (30) rooms.
- The number of guest rooms would increase from the existing fifty (50) to the proposed number of seventy (70).
- There was to be a net gain of twenty (20) guest rooms.

Figure 2 shows the 2026 Plan.

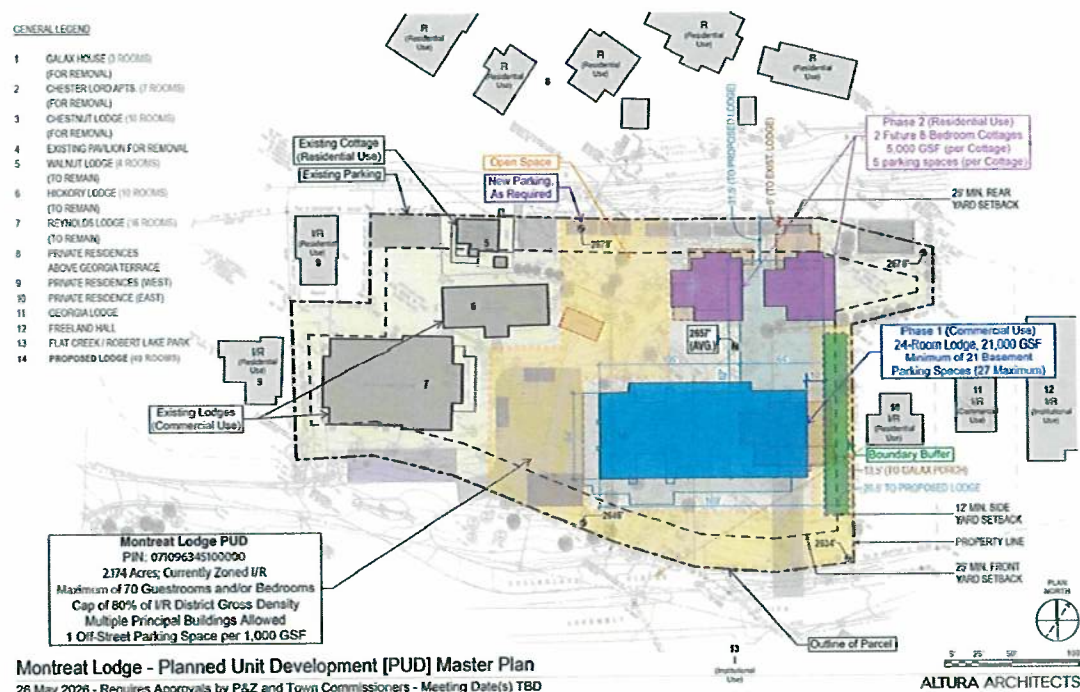


Figure 2: Lodge Expansion 2026 Plan (Source: Client)

Based on a review of the 2021 Plan and the 2026 Plan for the Lodge Expansion Project, there is no indication that the number of trips will be different between the 2021 Plan and the 2026 Plan. The number of rooms is depicted as the same in both plans. As a result, it is the opinion of J. M. Teague Engineering and Planning that the number of trips that are expected to be generated by the Mountain Retreat Association Lodge Expansion Project will not change from the original numbers based on the information shown on the current master site plan.

Thank you for the opportunity to provide you with this information. Please contact me if you have any questions or concerns.

Sincerely,

Jeffrey H. Moore, P. E.
Transportation Engineer

Public Comment Documents

THE KIMBALLS

465 Spring Lake Drive

Melbourne, Florida 32940

321-446-6080

July 16, 2026

Town of Montreat

Board of Planning and Zoning

PO Box423

Montreat, North Carolina 28757

Dear Planning and Zoning Committee Members,

Thank you for the opportunity to express our concerns about the proposed MRA “new village” (plan B) building project and the establishment of a PUD. When the hotel project was first announced five years ago, we spoke to the MRA Board about our concerns about potential noise, lighting, parking, loss of trees, pollution of Flat Creek and structural damage to the existing homes adjacent to the construction site.

This past week, July 10th we met with MRA President, Mr. Richard DuBose, to discuss the new “village concept”(plan B). Following this discussion, we still have the same concerns that we had with the “hotel project”(plan A). Of all the issues, our major issue still continues to be damage to our existing home from excavation and possible blasting. Excavation and loss of trees could lead to increased instability of our fragile mountain. This is especially true of our home at 316 North Carolina Terrace. Our home of 50 years , which is now 110 years old, is supported by a twelve to fourteen foot stone retaining wall on Georgia Terrace, directly across from the proposed village cottages. Should this wall fail due to any excavation or blasting during this proposed project, our home could shift vicariously and could be severely damaged.

If the request for the PUD is approved by the town, then does the town become responsible for the protection of our property from any damages incurred during construction? We feel that the MRA and the town of Montreat must assure us, in writing, that our property will be protected from such damages. We also feel that it is imperative for us to verbalize these concerns and ask that they be entered into the public record of the town of Montreat.

Sincerely,

Millard and Sandra Kimball

Requested Amendments to the MRA-Proposed PUD

Presented to the Planning and Zoning Commission

By the leadership team of the Montreat Stewards

July 16, 2026

We respectfully request that the Planning and Zoning Commission attach the following conditions or amendments to the PUD application, which would bring it closer into compliance with specific ordinance requirements and respond to broad public interest and concern.

Site Plan

1. Require the MRA should mark the corners and property lines of its surveyed lot, in order to provide project clarity.

Trees and Greenspace

2. The official Montreat Greenspace on Georgia Terrace should be maintained (see Tree Board map). Consistent with the Town's existing plan, appropriate measures should be put in place to ensure this remains undisturbed, including protection of the approximately 14 trees therein. Paving of the gravel secondary road that sits within this Greenspace should be avoided, according to arborists, to protect the trees.
3. In advance of PUD approval, the MRA should clearly designate on its plans the trees it intends to preserve.
4. The MRA should be required to use best practice in preservation of its own indicated trees, and apply this best practice also to protect trees on neighboring property. The agreed best practice must include a system to monitor compliance, and accountability for breaches (such as damage to fenced-off critical root zones).

Stormwater Control

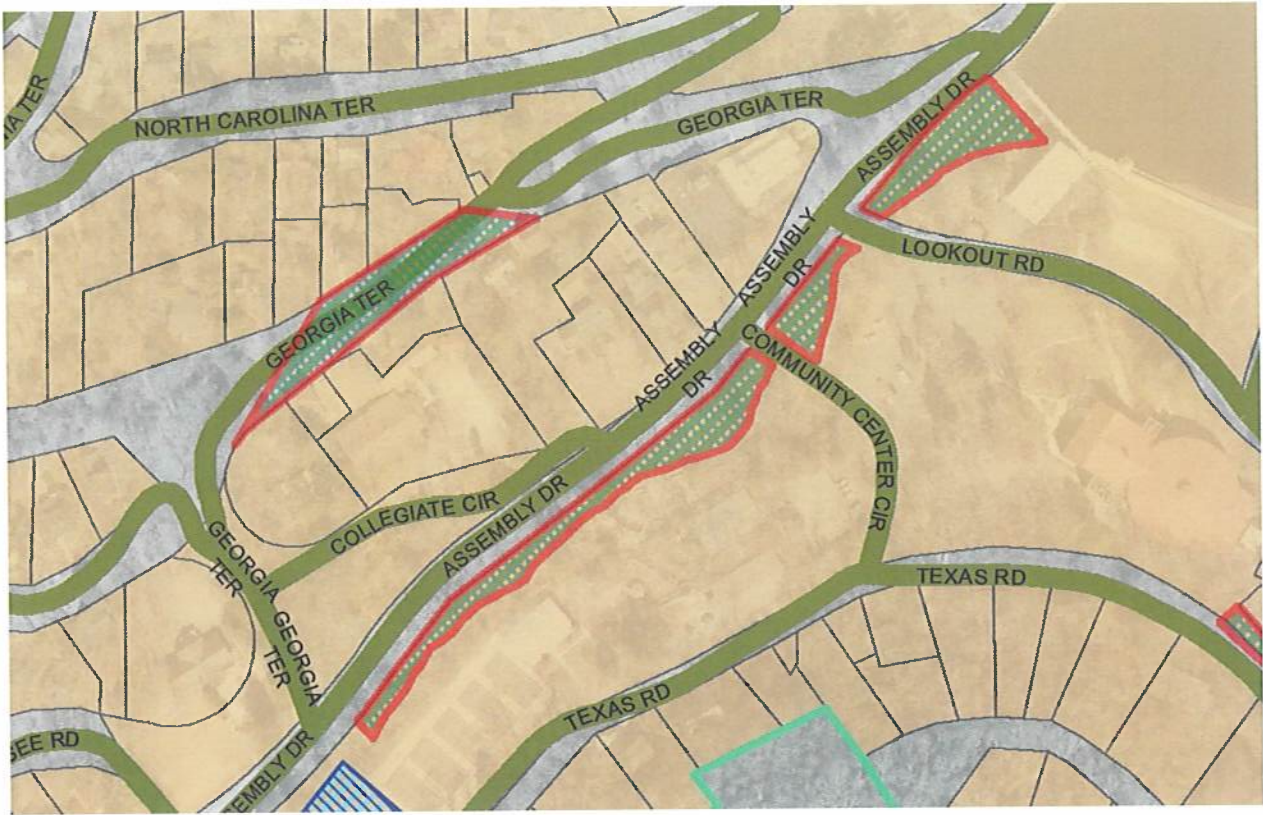
5. Because of the proximity to the Creek and the Robert Lake Park children's playground, and for the purpose of keeping this water clean, P&Z should ask the MRA to consider strengthening its 'Stormtech' stormwater control system. The minimal required is protection from a one-year 24-hour storm. The MRA is looking at the possibilities of a two-year 24-hour storm, providing twice the protection. The results of its ongoing research will help to guide what is possible.

6. A commitment to preserving as many of the large trees on the property as possible will significantly reduce stormwater run-off. Planting additional trees will – over time – also of course help, and there should be a specific commitment to replanting all trees that are lost.
7. The auto-court is planned as a permeable surface, which is much appreciated. The other areas of parking that are mapped as asphalt should also be permeable surfaces, which would greatly impact stormwater control.

Design and Character

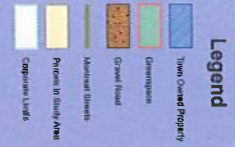
8. Incorporating a ‘Montreat look’ into what is already a very good design will be most welcomed. The MRA has been assessing what is possible on specific suggestions, based on input from an architectural historian that we brought into the conversation
9. It should also be clear that the buildings will be *substantially in conformity* with the renderings that they have presented.

From Montreat Tree Board Map – Showing Greenspaces in red



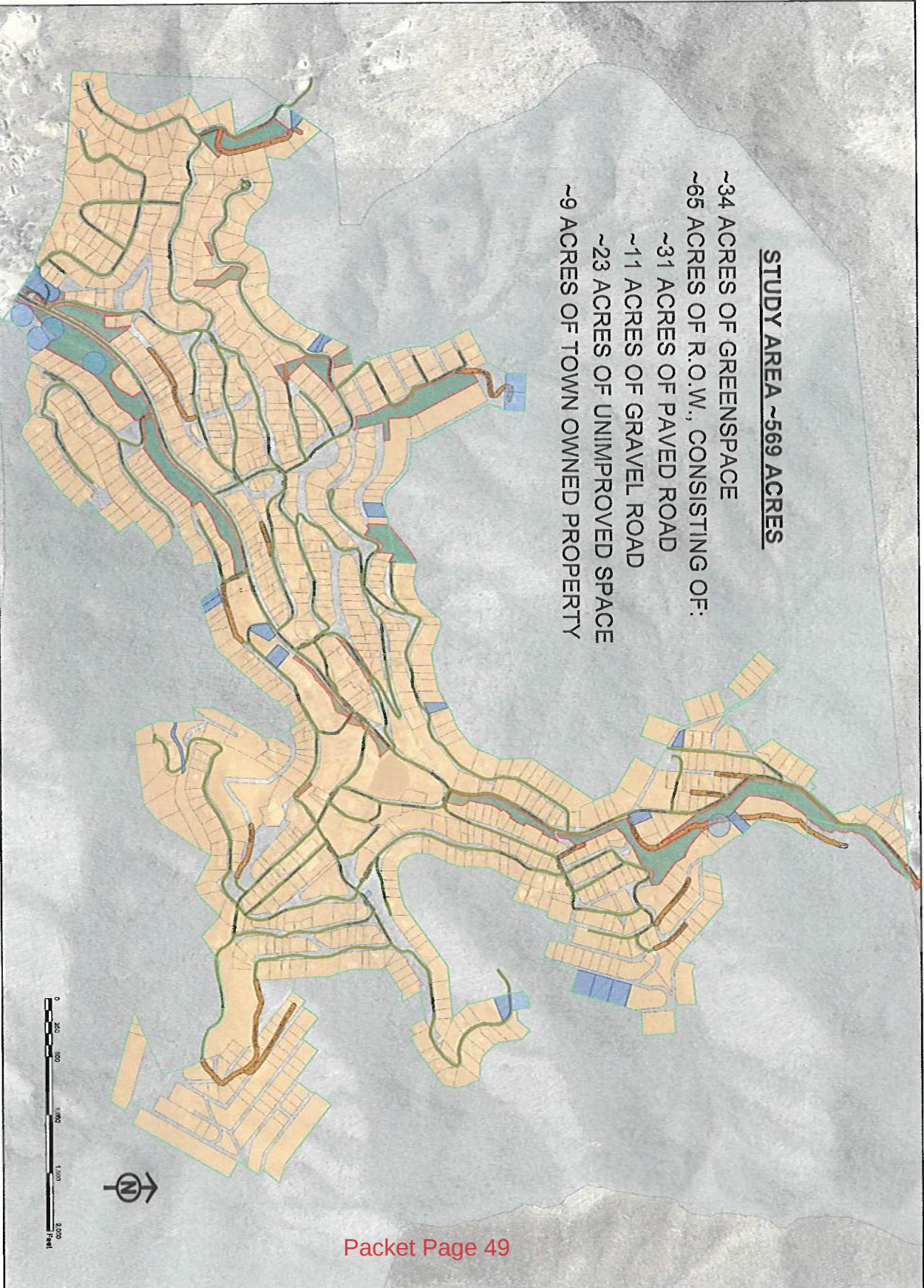
MONTREAT

TREE BOARD REFERENCE MAP



STUDY AREA ~569 ACRES

- ~34 ACRES OF GREENSPACE
- ~65 ACRES OF R.O.W., CONSISTING OF:
 - ~31 ACRES OF PAVED ROAD
 - ~11 ACRES OF GRAVEL ROAD
 - ~23 ACRES OF UNIMPROVED SPACE
- ~9 ACRES OF TOWN OWNED PROPERTY





Catawba Tree Experts, Inc.

John Andrew Wagner
526 Silvers Welch Rd.
Old Fort, NC 28762
828-772-6137
Andrew@Catawbatreexperts.com

Arborist's Report for 319 Assembly Dr.

Upon review of property line trees around the perimeter of 319 Assembly Dr., four large trees were observed to document their characteristics and dimensions in order to prepare specifications for preservation prior to proposed construction. Starting in the South corner of the property and working clock-wise around the house, a 29" DBH hemlock, 20" red cedar, 38" hemlock, and 40" sugar maple are all susceptible to encroachment if construction occurs on the property at 317 Assembly Dr, the old Galax House site. Each of these trees should have a construction and grading-free radius protected around them of 14.5', 10', 19', and 20' respectively.

Trees in good condition and without below ground restrictions may have root systems of 1 ft to 1.5 ft of radius per inch thickness diameter at breast height (DBH), and a radius of $\frac{1}{2}$ the total root zone radius is considered the "Critical Root Zone" or CRZ, which is the radius of roots whereas roots damaged in this area are likely to affect tree stability as well as significantly affect health. Catawba Tree Experts defines the CRZ as a 6" radius around the tree per inch DBH when performing pre-construction consultative services.

Property lines create complex situations when trees' roots and crowns overlap the property lines because trees are 'owned' by the property where the root flare is located. Nonetheless, neighboring properties are entitled to perform work on the trees' parts that hang over or grow into their property. That said, trees are property, and if those owners choose to prune limbs or cut roots of those trees, they cannot perform work that affects the health, or value of that property or tree. If work done on a neighboring property injures a tree during that work, neighboring homeowners may be held responsible for replacement or repairs needed to restore the injured property, including monetary damages.

In order for construction to occur at 317 Assembly Dr. without damaging the trees along the property at 319 Assembly Dr., Tree Protection Zones (TPZs) must be part of the construction process, and ALL CONSTRUCTION ACTIVITIES must be kept outside of the TPZ. To keep all traffic, impedance and grading out of the TPZ, fencing should be constructed around each tree, and fencing should be sturdy enough to prevent tampering by contractors or bystanders. Most fences are heavy gauge welded wire fence, attached to t-posts, and covered in orange snow-fencing for visibility. The fencing should also have signage indicating that the fencing shall not be tampered with until all construction is complete. The critical root zones should then be mulched and maintained following construction, and they should not be included in any

landscape installation plan or irrigation plan following construction, as that installation is also damaging to the Critical Root Zone.

Sincerely,

J. Andrew Wagner
ISA Certified Arborist #MA-4767A
828-772-6137
andrew@catawbatreexperts.com

Attachment 3

Staff Report – Planned Unit Development District (PUD) for 309 Collegiate Circle

Proposed Project: Richard DuBose, applicant on behalf of property owner Mountain Retreat Association, has submitted an application for a Planned Unit Development (PUD), requesting a rezoning for 309 Collegiate Circle (PIN# 071096345100000) from I/R Zoning District to PUD Zoning District.

Created by:

Alexis Baker, AICP, CZO
Interim Zoning Administrator
Town of Montreat

Created for:

Montreat Planning & Zoning Commission
July 16, 2026

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Attachments

1. Map Amendment Application
2. Master Plan
3. Development Standards and Supporting Documentation

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STAFF REPORT – Planned Unit Development Zoning District, 309 Collegiate Circle

Summary

The following report summarizes the Zoning Administrator's review of an application for a Planned Unit Development Zoning District submitted by Richard DuBose, applicant on behalf of property owner Mountain Retreat Association (MRA), at property described as 309 Collegiate Circle (PIN# 071096345100000).

Parcel Identifier Number (PIN #): 071096345100000

Address: 309 Collegiate Circle

Owner: MOUNTAIN RETREAT ASSOCIATION
PO BOX 969, MONTREAT, NC, 28757

Applicant: Richard DuBose (applicant)

Zoning: I/R, Institutional/Residential District

Current Land Use: Residential and Hotel (Lodge)

Utilities: Existing onsite (public water/private sewer)

Acres: 2.17 acres (94,699.44 SF lot)

Public Notice

Town staff mailed Public Notice to properties within 250' of the site on **July 1, 2026** (15 days ahead of **7/16/2026 Planning & Zoning Commission hearing**)

Montreat's Town Clerk will provide Public Notice at least one week ahead of the **7/16/26 Planning & Zoning Commission hearing**, posting notice via:

- The Town's website
- The Town's "Montreat Minute" e-mail newsletter
- Posted notice on a community bulletin board at the Montreat Post Office
- Posted notice on the Town's Hall's community bulletin board

While not a requirement per Section 511, the Applicant held public meetings with the community and neighbors on April 9, 2026, and May 5, 2026

Montreat Planning & Zoning Commission, Public Hearing: **7/16/26**

Public Notice cont.

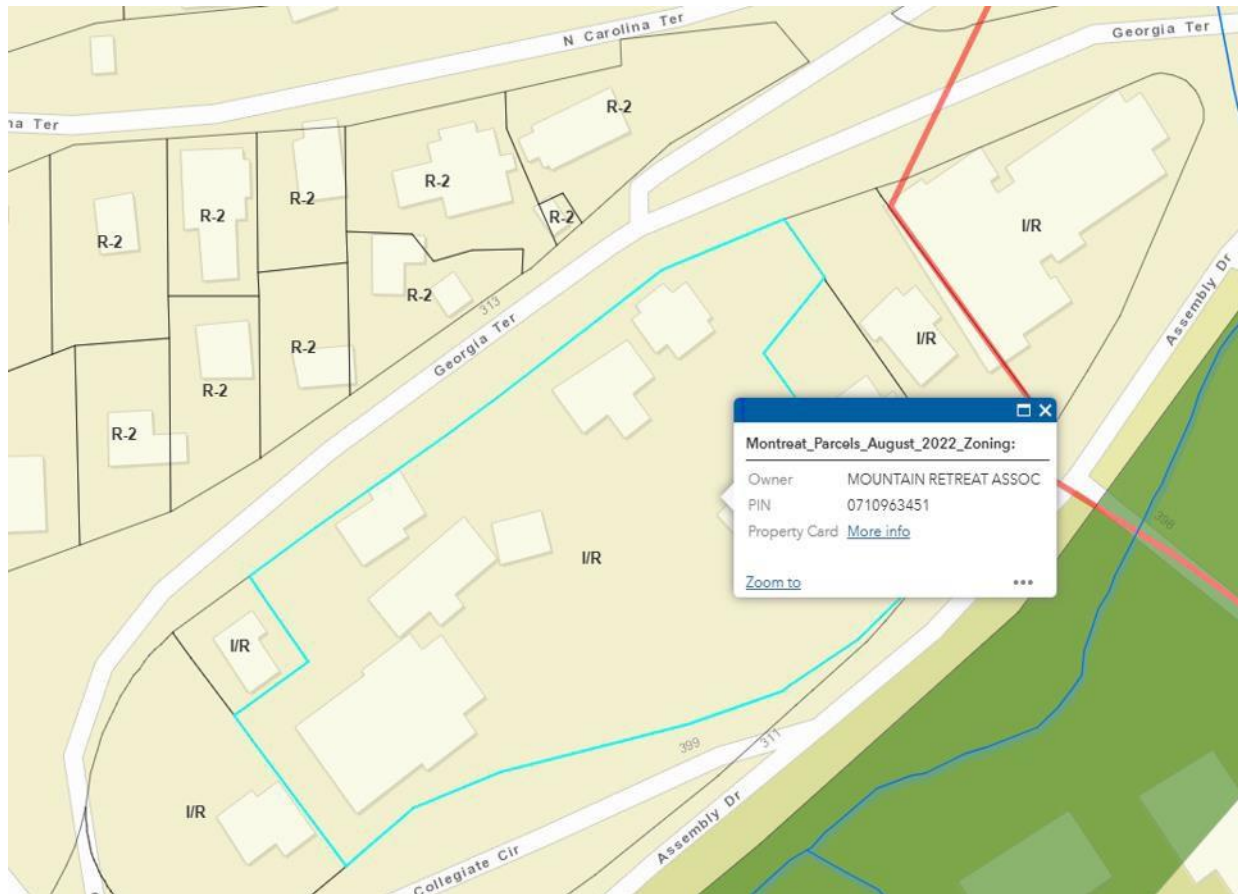


Figure 1: 250' Public Notice for Conditional Zoning, PIN 071096345100000, 309 Collegiate Circle

Planned Unit Development Zoning Request

Richard DuBose, applicant on behalf of property owner Mountain Retreat Association, has submitted an application for a Planned Unit Development (PUD) District requesting a PUD rezoning for 309 Collegiate Circle (PIN 071096345100000) from I/R to PUD zoning district.

Staff analysis is provided by Alexis Baker, AICP, CZO, Interim Montreat Zoning Administrator, in addition to applicant-provided materials. This report contains references to the Montreat Zoning Ordinance (**MZO**) and Montreat General Ordinances (**MGO**) where noted.

Planned Unit Development Zoning

A Planned Unit Development shall be a new zoning District that replaces the existing zoning District. The development standards and land Uses in the approved PUD Master Plan are the zoning regulations, standards, and land Uses for a PUD in the PUD District. The Official Zoning Map shall identify the area covered by each PUD District (MZO Section 511.3).

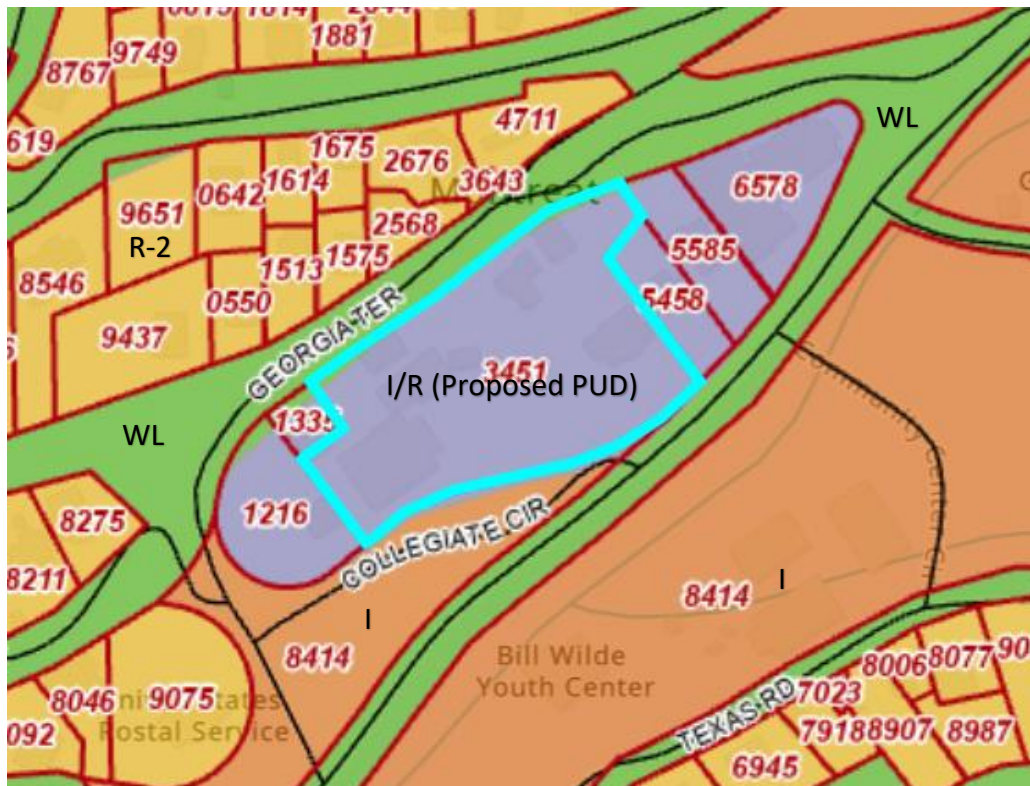


Figure 2: Current Montreat Zoning Districts

The subject property is currently zoned I/R - Institutional/Residential District. The zoning districts surrounding the subject property are as follows:

North : WL - Woodland District

South: I - Institutional District and WL - Woodland District

East and West: I/R – Institutional/Residential District

The WL zoning district properties, in green, per an agreement between the MRA and Town of Montreat, signed in 1983, were dedicated to the public and Town of Montreat for recreation, fishing, greenspaces, beautification, and for street, bridge, and utility right-of-way.

Please note, the subject of the proposed PUD zoning district request is only for 309 Collegiate Circle (PIN # 071096345100000). Any property added to this PUD zoning district request will be subject to re-review and approval through a public hearing process.

Development Standards

Development standards established by the approved PUD Master Plan shall be the applicable development standards within the PUD. Such standards shall include, but are not limited to, Building Height, building separations, building Setbacks, parking requirements, Lot size, Yard, Buffer and landscape requirements or other dimensional standards (MZO Section 511.35).

Uses

Existing rental cottages and additional residential uses are on the property. Several existing buildings will be demolished.

All Uses that are set out in the approved PUD Master Plan shall be treated as a permitted Use within the District (MZO Section 511.31).

Per the submitted development standards, multiple principal buildings are proposed.

The applicant proposes the following by-right permitted uses in the submitted development standards:

Permitted Uses-by-Right in the Montreat Lodge PUD District:

- Public & Institutional: Conference Center
- Commercial: Hotel (Lodge)

All Permitted Uses in the I/R District, which include the following:

- Single Family Dwelling
- Two Family Dwelling
- Multi-Unit Dwelling
- Family Care Homes
- Accessory Buildings or Uses
- Home Occupation
- Studios
- Swimming Pools, Private
- Auditorium
- College
- Educational Facility
- Library, Public
- Municipal Government Facilities
- Museums, Public

The proposed master plan identifies existing and proposed residential (cottages) and commercial (hotels/lodges) uses on the property.

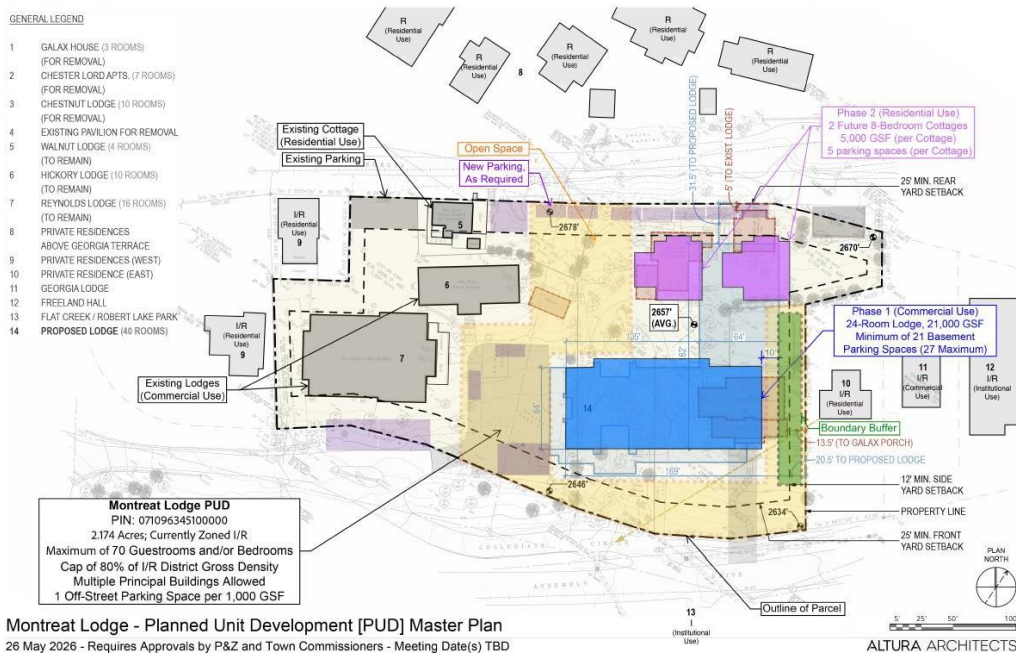


Figure 3: Montreat Lodge - Planned Unit Development (PUD) Master Plan, 26 May 2026

Setbacks

The master plan identifies the proposed setback standards as a minimum of 25' for the front and rear yard setbacks and a minimum of 12' for the side yard setbacks.

Density

Per the MZO, the PUD Master Plan shall identify the total number of residential units and the maximum square footage for non-residential Uses. The form for presenting these quantities shall be clearly presented and easy to track. If the measure used includes Density, gross density is the applicable standard (MZO Section 511.32).

The master plan indicates a total of six (6) existing and proposed buildings proposed on the property.

Per the submitted PUD application, the applicant proposes that the following parameters be placed on the PUD:

- Combined residential bedrooms and non-residential guestrooms shall not exceed 70 (140 beds).
- Lower density, in the form of total building area being capped at 80% of what is permitted under the I/R district zoning.

Parking Requirements

The proposed parking standards for the PUD zoning district will use MZO Section 702.4, rather than Section 702.1 and 702.2 for residential dwellings and hotels.

Section 702.4 (Other Occupancies/uses) states:

One (1) standard space is required per 1,000 square feet of Gross Floor Area. Ten percent (10%) of the total number of required standard spaces may be met through installation of compact car spaces.

Building Height

The applicant proposes the following building height standards:

- Maximum Building Height is forty feet (40'), measured from the Average Natural Grade at the footprint of each principal building. All proposed Buildings, other than Single Family, must be approved by the authority having jurisdiction for fire code enforcement. Structures over thirty-five feet (35') in height will require special fire protection systems

This varies from Section 201 Definitions, which defines building height as “ the vertical distance measured from the Average Natural Grade of the applicable Lot to the highest point of the roofline of the applicable Building, or from the top of the parapet or roof surface for flat-roofed Buildings.”

Separation

As proposed by the applicant, “separation [between buildings] shall not be required (except as may be required by the Building Code and/or Fire Code).”

Open Space

The applicant proposes the following requirements per the proposed development standards and master plan:

- Open Space shall be a minimum of 20% of the total lot area, reducing the buildable area to 80%.
- Refer to the PUD District Master Plan for the proposed amount of open space.
- No revisions, alternatives, and/or clarifications to the Town’s adopted plans for greenways, recreation space, and open space are provided.
- No conservation and/or preservation areas are provided.
- No public recreation areas are provided.
- Management and long-term maintenance of open space will be conducted by a private entity (the Mountain Retreat Association).

Landscaping

The applicant proposes the following requirements per the proposed development standards and master plan:

- Except as shown on the PUD District Master Plan, there shall be no variations from compliance with Article IX.
- Refer to the PUD District Master Plan for the transition between the PUD and land Uses adjacent to the outer boundary of the PUD; these may include buffers, specific compatible land Uses, and/or other transitions; these boundary transitions may be varied over their length and/or width.

Per Article IX- Landscaping of the MZO:

No less than five percent (5%) of the Lot or parcel which is the subject of the required landscape plan shall be landscaped. This requirement may be met with both existing and new plants and trees. This requirement shall be met in addition to any area required for screening, provided that the total area of the site devoted to landscaping shall not be required to exceed forty percent (40%) of the site (MZO Section 902).

Additionally, for all off-street parking and loading areas, landscaping is required for parking lots over 2,500 square feet (MZO Section 903). Developers must also make every effort to protect existing plants.

All developers of public and private property shall make every effort to protect and retain existing trees, shrubbery, vines, and grasses not actually lying in public roadways, drainage-ways, Building foundation sites, private driveways, paths and public walkways wherever possible. Trees are to be protected and preserved during construction in accordance with sound conservation practices. All such trees may be preserved by well islands or retaining walls wherever abutting grades are altered (MZO Section 904- Existing Flora).

Screening and Signs

The applicant proposes that development standards for screening and sign regulations will comply with Section 504.12 and 504.13 of the MZO. Screening regulations require unlike and dissimilar uses abutting each other in the same or different districts to include a six foot (6') high closed fence or evergreen vegetation of sufficient density to serve the purpose of a solid fence.

Additional Requirements

The applicant noted that MRA will consult with the police chief and fire chief regarding potential impacts of the PUD District Master Plan. They also noted that no historic structures were on the parcel. A technical memorandum dated 8 October 2012, stated that "the added trips do not reach the TIA [transportation impact analysis] threshold of NCDOT."

General Ordinances and Environmental Standards

Except as otherwise provided by the adopted PUD Master Plan, property within an approved PUD shall be subject to all applicable regulations, subdivision plan approvals, site plan approvals, and other permits and approvals required by Town ordinances (MZO Section 511.32).

Erosion & Sediment Control (ESC)

Erosion & Sediment Control (ESC) is the technical term for “stormwater control during construction”.

The Town of Montreat does not have its own independent ESC standards, but rather, references Buncombe County’s standards as follows:

MONTREAT CODE OF GENERAL ORDINANCES

CHAPTER K – ENVIRONMENT

ARTICLE II: SOIL EROSION AND SEDIMENTATION CONTROL ORDINANCE

(Refers to the most updated version of the “Buncombe County Soil Erosion and Sedimentation Control Ordinance.”)

Projects that disturb more than one (1) acre of land are subject to Buncombe County ESC review and permitting. This project **appears to disturb more than one (1) acre** and therefore is subject to Buncombe County ESC review.

Post-Construction Stormwater Control

Post-Construction Stormwater Control is the technical term for “stormwater control after construction is complete.” The applicant is required to adhere to all relevant Post-Construction Stormwater Control requirements in MGO, Chapter K, Article III: Stormwater Management.

The applicant has supplied a stormwater plan labeled “309 Collegiate Circle – Plan Addressing Stormwater.” This plan, attached to this report, shows that several stormwater control measures exist or will be incorporated on site, including catch basins, diversion swales, permeable pavement, drop inlets, storm drains, pipes, and underground detention measures. The increase in the impervious area is estimated to be 9,730 square feet.

Hillside and Floodplain Development

The Town of Montreat’s Hillside Development and Floodplain Development ordinances are not applicable to this site since neither steep slopes (>40% slope) nor floodplains exist on the site.

Comprehensive Plan

According to page 54 of **Montreat Tomorrow: Town of Montreat Comprehensive Plan** (2023), the following objectives may apply to this project:

Preserve, protect, and enhance the character of Montreat by evaluation and improving existing allowable uses, densities, and dimensional regulations in each Zoning District.

Investigate development regulations per Zoning District for short-term rentals with consideration for existing short-term rentals and potential funding sources.

In the spirit of the long-term success of the Town of Montreat, work collaboratively with the institutions of the Town, including, but not limited to, Montreat College and the Mountain Retreat Association, on any future development to support the vitality and future of the institutions and the town.



MAP AMENDMENT APPLICATION

Town of Montreat Planning and Zoning
1210 Montreat Road, Black Mountain, NC 28711 | (828) 669-8002

REQUIRED FEE: \$200.00 (CASH OR CHECK)

INSTRUCTIONS

All applications for amendments to the Town of Montreat's Zoning Map must include a completed and signed application and fee, set forth by the Town of Montreat Fee Schedule. Completed applications are submitted to the Town Clerk. All fees must be made payable to the Town of Montreat. Fees are non-refundable except where an application is withdrawn prior to its consideration by the Planning and Zoning Commission. The Zoning Administrator will determine whether the application is complete following its submittal and will notify the applicant via the contact information listed below of the tentative meeting dates that the Planning and Zoning Commission and Board of Commissioners will hear the proposal and of any action taken or decision made concerning this request. All meetings of the Planning and Zoning Commission and Board of Commissioners are open to the public.

APPLICANT INFORMATION

APPLICANT NAME: Mountain Retreat Association TELEPHONE: (828)669-2911
MAILING ADDRESS: 401 Assembly Drive CITY: Montreat STATE: NC ZIP: 28757
LOCAL ADDRESS: 401 Assembly Drive CITY: Montreat STATE: NC ZIP: 28757
EMAIL: rdubose@montreat.org

PROPERTY INFORMATION

PLEASE NOTE: A RECORDED SURVEY MAP, DEED, OR OFFER TO PURCHASE MAY BE REQUIRED AT THE ZONING ADMINISTRATOR'S DISCRETION.

ADDRESS: 309 Collegiate Circle CITY: Montreat STATE: NC ZIP: 28757
PIN#: 071096345100000 TOTAL ACREAGE: 2.174 FLOODPLAIN: ☐ YES ☒ NO
PROPERTY OWNER: Mountain Retreat Association TELEPHONE: (828)669-2911
MAILING ADDRESS: 401 Assembly Drive
CURRENT ZONING: I/R OTHER: _____ OVERLAY ZONING: N/A
REQUESTED ZONING: N/A OTHER: PUD OVERLAY ZONING: N/A

STATE THE REASON FOR THE REQUEST (ATTACH SHEETS AS NECESSARY): Per Section 511 of the MZO, a Planned Unit Development is requested. Please refer to the attached documents for additional information.

CONDITIONAL ZONING REQUESTS DOCUMENTS

For Conditional Zoning Requests, the applicant is required to hold a community meeting in accordance with Section 510.4 of the Montreat Zoning Ordinance.

DATE OF COMMUNITY MEETING: 9 April 2026

CONDITIONAL ZONING APPLICATIONS MUST INCLUDE THE FOLLOWING DOCUMENTS:

1. A site plan drawing (to scale) showing:
 - a. The total acreage, present zoning classifications and Uses for the subject property and adjacent properties, date, and north arrow.
 - b. All existing Easements, reservations, and rights-of way.
 - c. Areas within the regulatory floodplain as shown on official Flood Hazard Boundary Maps for the Town of Montreat including delineation of streams and associated stream Buffers.
 - d. All proposed uses of land and structures, including all required and requested setbacks. For residential uses this includes the number of units and an outline of area where the Structure will be located. For nonresidential uses, this includes the approximate square footage of all structures and an outline of the area where the structures will be located.
2. If applicable, a written report of the community meeting including a listing of those persons and organizations contacted about the meeting and the manner and date of contact, the time, date, and location of the meeting, and a description of any changes to the rezoning application made by the applicant as a result of the meeting.

SIGNATURES AND ACKNOWLEDGEMENT

I, Richard DuBose, hereby certify that all of the information set forth above is true and accurate to the best of my knowledge.



Signature of Applicant

19 May 2026

Date

Richard DuBose

Printed Name of Applicant

OFFICE USE ONLY
☐

Complete

☐

Incomplete

Zoning Administrator Signature

Date

Printed Name of Zoning Administrator

Fee: _____

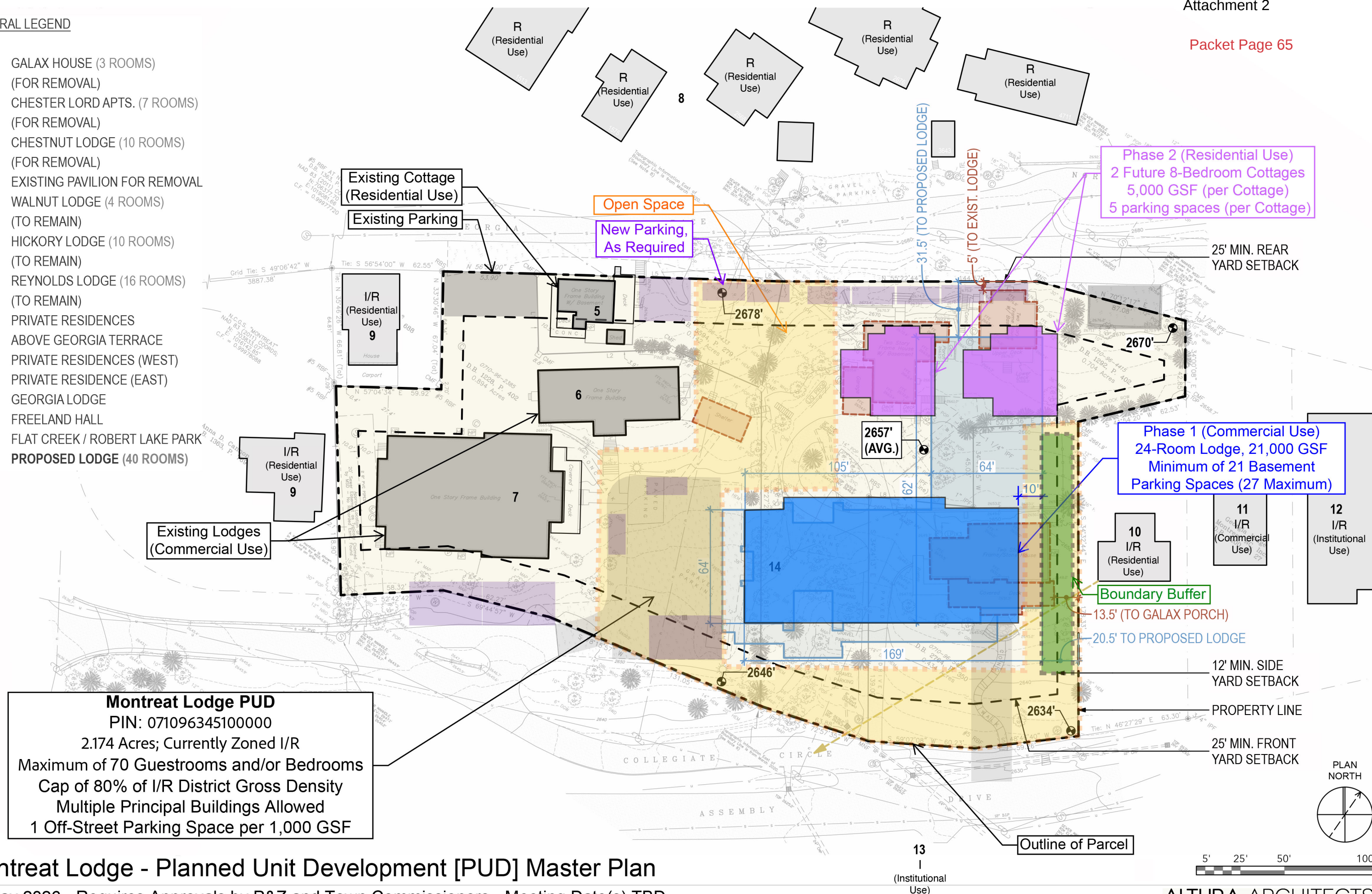
Paid: ☐ Yes ☐ No

Payment Method: _____

Scheduled Planning and Zoning Commission Meeting Date: _____

Scheduled Board of Commissioner Meeting Date: _____

- 1 GALAX HOUSE (3 ROOMS)
(FOR REMOVAL)
- 2 CHESTER LORD APTS. (7 ROOMS)
(FOR REMOVAL)
- 3 CHESTNUT LODGE (10 ROOMS)
(FOR REMOVAL)
- 4 EXISTING PAVILION FOR REMOVAL
- 5 WALNUT LODGE (4 ROOMS)
(TO REMAIN)
- 6 HICKORY LODGE (10 ROOMS)
(TO REMAIN)
- 7 REYNOLDS LODGE (16 ROOMS)
(TO REMAIN)
- 8 PRIVATE RESIDENCES
ABOVE GEORGIA TERRACE
- 9 PRIVATE RESIDENCES (WEST)
- 10 PRIVATE RESIDENCE (EAST)
- 11 GEORGIA LODGE
- 12 FREELAND HALL
- 13 FLAT CREEK / ROBERT LAKE PARK
- 14 **PROPOSED LODGE (40 ROOMS)**



26 May 2026 - Requires Approvals by P&Z and Town Commissioners - Meeting Date(s) TBD

Montreat Lodge - Planned Unit Development District
Development Standards
 30 June 2026

Narrative:

Strict application of the I/R Zoning District regulations does not provide the flexibility MRA requires to develop this parcel now and into the future. This Zoning Map Amendment strengthens the long-term viability of Montreat's conference operations by creating a Montreat Lodge PUD District that is scaled to mission, respectful of neighbors, and structured for future flexibility. It protects open space, limits density, aligns residential and non-residential uses with surrounding zoning, and ensures that all future development is managed under a single, clear, and enforceable framework.

Variations from the following applicable I/R District regulations and standards are being requested:

- Multiple principal buildings are permitted, reducing the scale and impact of a single, large, combined building.
- Section 702.4 governs Off-Street Parking Space Requirements
 - The parcel combines lodging, cottage rental, and the activities of conferees, including dining, gathering, and meeting.
 - With a blend of Uses, Section 702.4 most aptly governs the Montreat Lodge PUD District's Off-Street Parking, simplifying the calculation of required spaces.
- Permitted Uses requiring added clarification:
 - Lodge is a Permitted Use-by-Right.
 - Conference Center is a Permitted Use-by-Right.

In return for greater flexibility in regard to a mix of various land Uses, the Montreat Lodge PUD District shall provide:

- Creative design in the layout of buildings, open space, and circulation
- Open space amenities for guests
- Compatibility with surrounding land Uses and neighborhood character
- Greater efficiency in the layout and provision of roads, utilities, and other infrastructure
- Environmentally sensitive development, conforming to the requirements of the Montreat Zoning Ordinance, Stormwater Management Ordinance, and Noise Control Ordinance
- Protection of health, safety, and general welfare without unduly inhibiting the development of the property
- Lower density, in the form of total building area being capped at 80% of what is permitted under the I/R district zoning
- Fewer bedrooms than complete build-out of the parcel as Multi-Family Dwelling(s)

Permitted Uses-by-Right in the Montreat Lodge PUD District:

- Public & Institutional: Conference Center
- Commercial: Hotel (Lodge)

Permitted Uses-by-Right in the Montreat Lodge PUD District (continued):

- All Permitted Uses in the I/R District, which include the following:
 - Single Family Dwelling
 - Two Family Dwelling
 - Multi-Unit Dwelling
 - Family Care Homes
 - Accessory Buildings or Uses
 - Home Occupation
 - Studios
 - Swimming Pools, Private
 - Auditorium
 - College
 - Educational Facility
 - Library, Public
 - Municipal Government Facilities
 - Museums, Public

Summary of Gross Density of Residential and Non-Residential Uses:

- Combined residential bedrooms and non-residential guestrooms shall not exceed 70 (140 beds).
- Open Space shall be a minimum of 20% of the total lot area, reducing the buildable area to 80%.

Development Standards:

- Refer to Sections 504.1 through 504.9 of the I/R District for Purpose, Use, and Lot requirements.
- Maximum Building Height is forty feet (40'), measured from the Average Natural Grade at the footprint of each principal building. All proposed Buildings, other than Single Family, must be approved by the authority having jurisdiction for fire code enforcement. Structures over thirty-five feet (35') in height will require special fire protection systems
- Refer to Section 702.4 for Off-Street Parking Space Requirements.
- Refer to Sections 504.12 and 504.13 of the I/R District for Screening and Sign Regulations.
- Separation between buildings shall not be required (except as may be required by the Building Code and/or Fire Code)
- Multiple Principal Buildings shall be permitted.
- Open Space Requirements:
 - Refer to the **PUD District Master Plan** for the proposed amount of open space.
 - No revisions, alternatives, and/or clarifications to the Town's adopted plans for greenways, recreation space, and open space are provided.
 - No conservation and/or preservation areas are provided.
 - No public recreation areas are provided.
 - Management and long-term maintenance of open space will be conducted by a private entity (the Mountain Retreat Association).
- Additional Landscaping and Buffers
 - Except as shown on the PUD District Master Plan, there shall be no variations from compliance with Article IX.
 - Refer to the **PUD District Master Plan** for the transition between the PUD and land Uses adjacent to the outer boundary of the PUD; these may include buffers, specific compatible land Uses, and/or other transitions; these boundary transitions may be varied over their length and/or width.

Submission Check List:

- Community Meeting was held on 9 April 2026.

Persons and organizations contacted; manner and date of contact:

On 6 April 2026, the MRA sent a notice of the Community Meeting to be held on 9 April 2026 in email correspondence (to over 22,000 subscribers), in a separate notice in the weekly Community Announcements (a weekly Montreat-area community announcement email put out by the MRA), and on its social media accounts.

Written report of the community meeting held on 9 April 2026

The community meeting was held at 4:00 p.m. in Upper Anderson Auditorium in the Melvin Center, located at 401 Assembly Drive, Montreat, NC 28757.

The presentation included an overview of the MRA Board of Directors' direction for the project, including the construction of a smaller 24-room lodge and the possibility of developing residential-style cottage facilities on the northern half of the parcel as an alternative to building the planned second wing of the lodge. Over 100 people attended the meeting in person, and an additional 200-plus viewers watched the meeting via livestream. A recording was made available online following the event.

The alternative of residential-style cottages was generally well received by those in attendance at the Melvin Center, and the MRA is therefore pursuing the approvals necessary from the Town to implement this plan.

- Meetings with Neighbors (including Hayners, Joneses, and their attorney John Noor) was held on 5 May 2026.

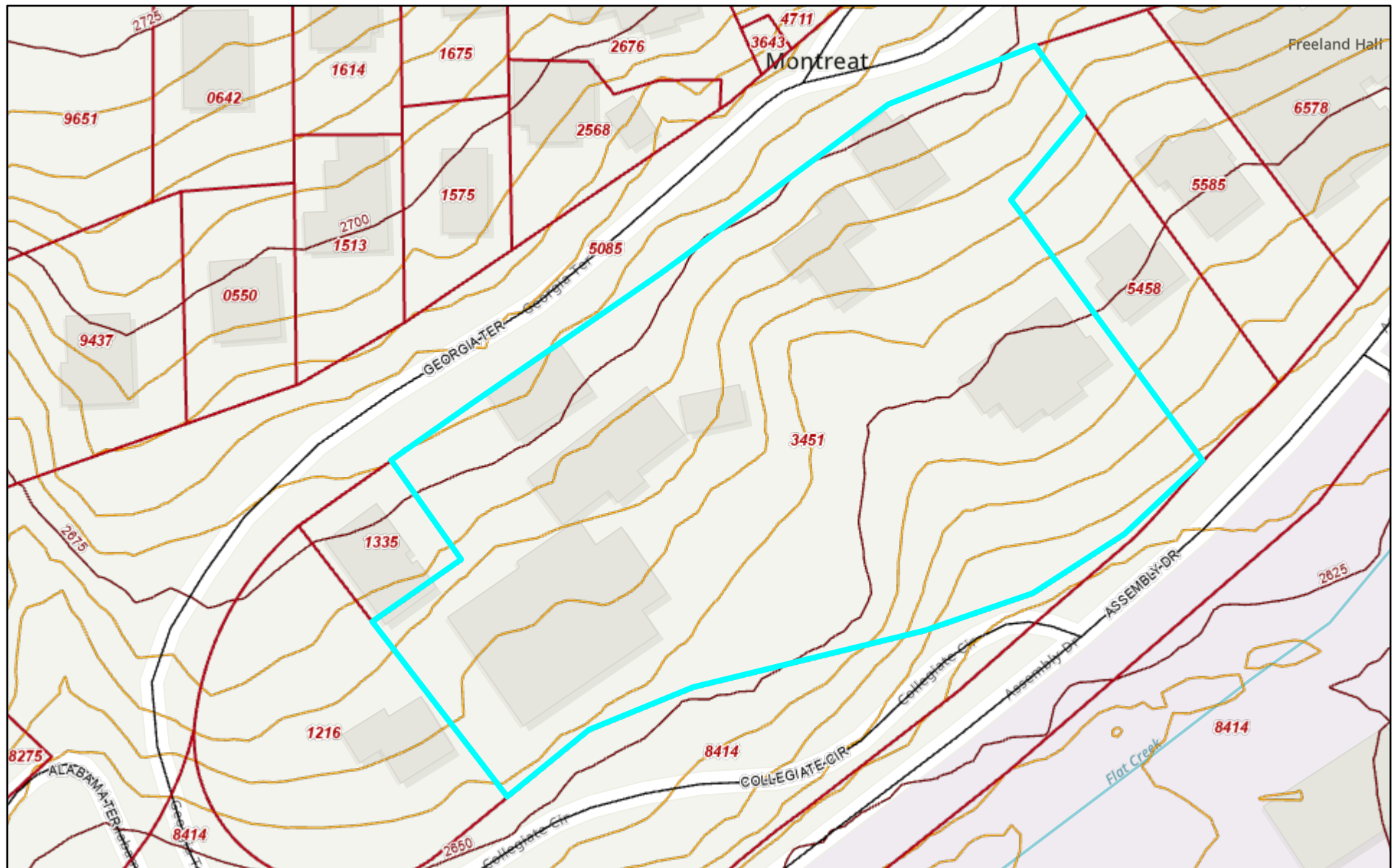
Questions raised about building materials, setbacks, and other issues were discussed.

- *Additional subsequent meetings with neighbors and other interested citizens are being held, following the Community Meeting, and those discussions will continue.*
- Pre-Application Meeting with Town Staff was held on 14 May 2026.

1. **PUD District Master Plan** includes the following:

- a map, including parcel numbers, showing the parcels proposed for the PUD
- a topographic map(s) for the property included in the proposed PUD
- the locations of the proposed Uses
- a map(s) showing the locations of water bodies appearing on USGS or NRCS Soil Survey maps within or adjacent to the boundary of the proposed PUD
- a map(s) showing the locations of wetlands, stream Buffers, the 100 year floodplain, and slopes greater than 30%
- a utility plan that includes the type and general location of the proposed public utilities
- a plan addressing stormwater within the proposed PUD

2. **PUD District Development Standards** include the following:
 - a list of permitted Uses proposed in the PUD
 - a summary of the gross density of those Uses proposed in the PUD
 - proposed land development standards/regulations for the PUD
3. Additional Requirements requested by the Town of Montreat:
 - a public service plan for the PUD that evaluates potential impacts on: police service, fire service, schools **(MRA will consult with the police chief and fire chief regarding potential impacts of the PUD District Master Plan.)**
 - a multi-modal transportation plan for the PUD that includes the location of existing and proposed major roads in and adjacent to the PUD; to the extent practicable, the on-site transportation system shall be integrated with the off-site transportation system **(The PUD District Master Plan shows major roads adjacent to the parcel. The on-site paved areas are integrated with the off-site transportation system.)**
 - a plan for an on-site transportation systems that addresses vehicular, bicycle, transit and pedestrian circulation **(Refer to the PUD District Master Plan for on-site transportation systems.)**
 - the location of known historic Structures or sites within the PUD **(There are no historic structures on the parcel.)**
 - a recreation and open space plan(s) that includes the locations and standards for open space and recreation areas within the PUD **(Refer to the PUD District Master Plan for delineation of open space.)**
 - a boundary Buffer plan showing transition treatments between the proposed PUD and adjacent properties **(Refer to the PUD District Master Plan for transition treatments.)**
 - a plan for development phasing within the PUD **(Refer to the PUD District Master Plan for development phasing.)**
 - the Town Administrator or Board of Commissioners may require a Traffic Impact Analysis (TIA) to be conducted by the applicant and submitted as part of the rezoning application **(Refer to the Technical Memorandum, dated 8 October 2021, which states “the added trips do not reach the TIA threshold of NCDOT”. The scale of participation in Montreat Conference Center programs has not changed since 2021.)**
 - topographic map for the property included in the proposed PUD **(Topographic elevations of the parcel range from 2630 feet to 2680 feet; refer to 309 Collegiate Circle – Topographic Map.)**
 - a map showing the locations of water bodies appearing on USGS or NRCS Soil Survey maps within or adjacent to the boundary of the proposed PUD **(Flat Creek is adjacent to the boundary of the parcel; refer to 309 Collegiate Circle – Water Bodies Map.)**
 - maps showing the locations of wetlands, stream buffers, the 100 year floodplain, and slopes greater than 30%; a utility plan that includes the type and general location **(There are no wetlands, streams, or floodplains on the parcel. The percent slope is 17.56 from www.mapwnc.org/find-slope-for-parcel; refer to 309 Collegiate Circle – Slopes Map.)**



May 20, 2026

309 Collegiate Circle - Topographic Map

Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community

Find Slope for a Parcel

1. Use [SimpliCity](#) or [mapAsheville](#) to find the PIN of the parcel you are interested calculating slope for.
2. Enter the 10 or 15 digit PIN below and click Calculate.

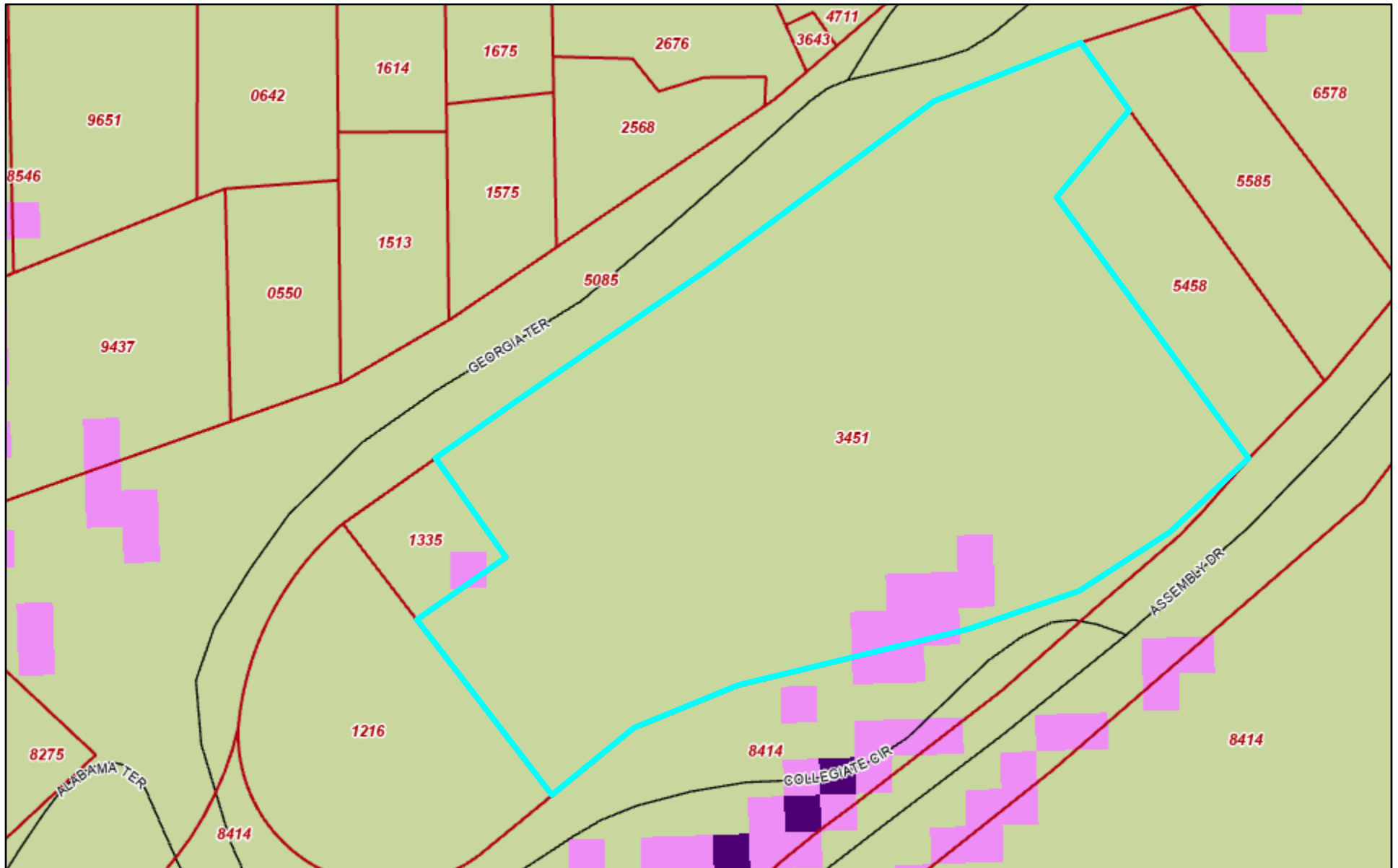
Enter one or more PINs. Separate multiple PINs with commas.

071096345100000

Calculate

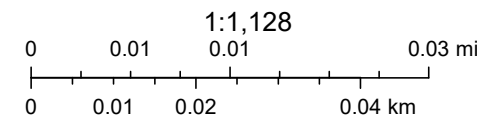
Your results:

Jurisdiction	TOWN OF MONTREAT
Acres	2.20736
Max Elevation	2680
Percent Slope	17.56

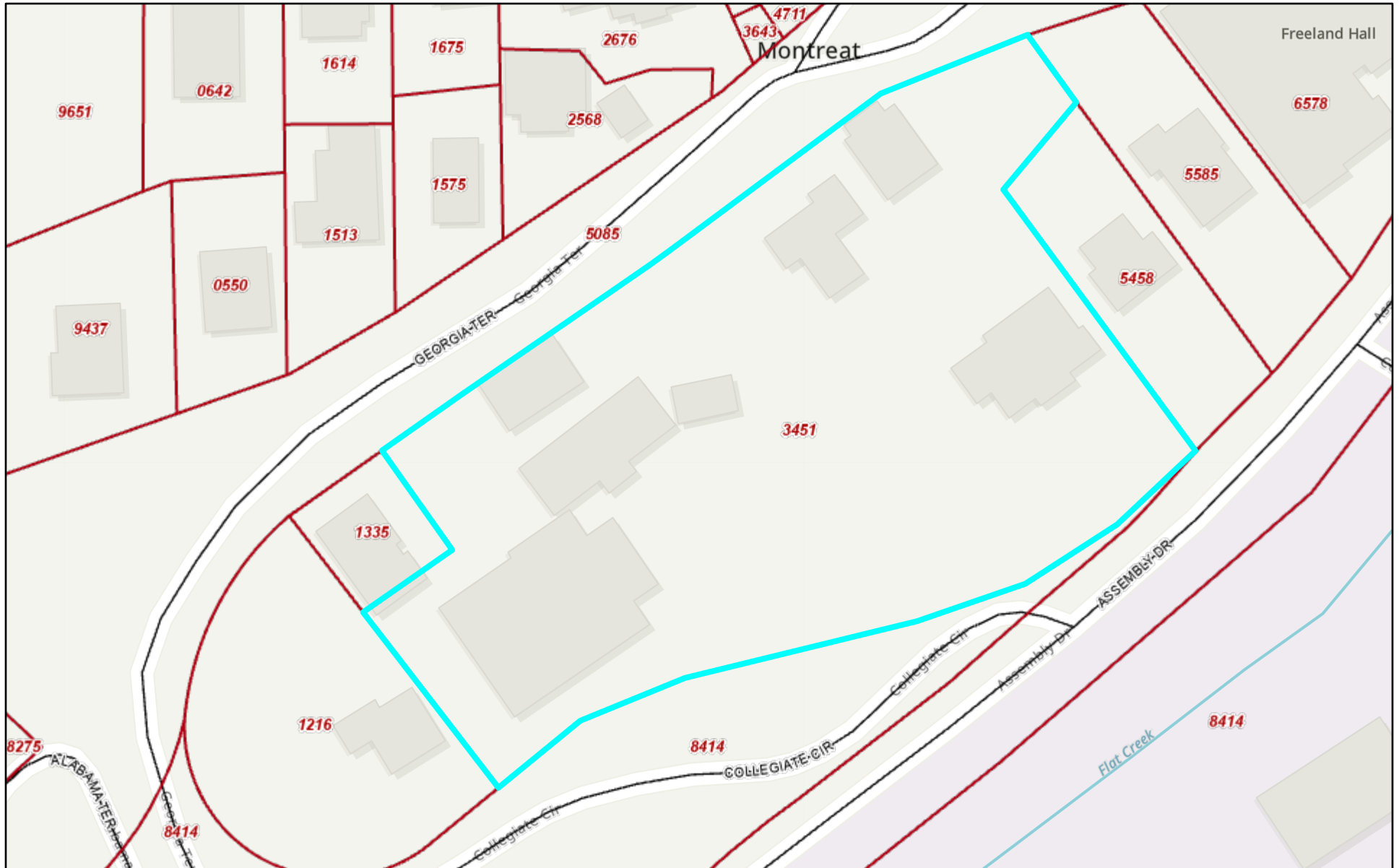


May 20, 2026

309 Collegiate Circle - Slopes Map

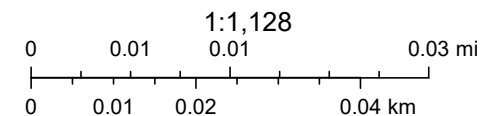


Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community



May 20, 2026

309 Collegiate Circle - Water Bodies Map

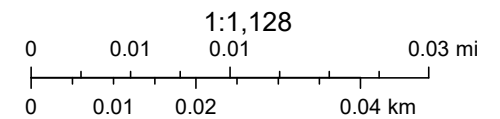


Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community

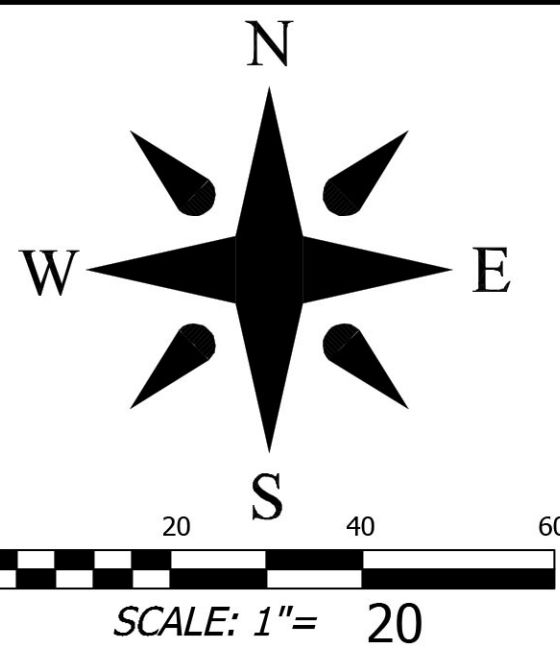


May 20, 2026

309 Collegiate Circle - Buffers and Floodplain Map



Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community



309 Collegiate Circle - Plan Addressing Stormwater

GRADING AND STORMWATER LEGEND

	EXIST. BOUNDARY
	EXIST. ADJOINER
	EXIST. STREAM
	EXIST. STREAM BUFFER
	FEMA FLOOD HAZARD LINE (1%)
	EXIST. RIGHT OF WAY
	EXIST. MANHOLE
	EXIST. SANITARY SEWER
	EXIST. OVERHEAD UTILITIES
	EXIST. STORM DRAIN
	EXIST. MINOR CONTOUR
	EXIST. MAJOR CONTOUR
	NEW MINOR CONTOUR
	NEW MAJOR CONTOUR
	NEW BUILDING
	NEW PAVEMENT
	NEW CONCRETE SIDEWALK
	NEW PROPERTY LINES
	NEW RIGHT OF WAY
	NEW 24" CURB & GUTTER
	NEW GRAVEL
	NEW STORM PIPE
	NEW YARD INLET
	NEW DROP INLET
	NEW CATCH BASIN
	NEW JUNCTION BOX
	NEW DIVERSION SWALE
	NEW OUTLET PROTECTION
	NEW SPOT GRADE
	NEW RETAINING WALL
	NEW WATER DISTRIBUTION MAIN
	NEW WATER FIRE HYDRANT
	NEW WATER VALVE
	NEW AIR/VAC RLS VALVE
	NEW WATER BLOW-OFF VALVE
	NEW WATER DOMESTIC METER
	NEW MANHOLE
	NEW SEWER LINE
	NEW SANITARY CLEAN OUT

PROPOSED RETAINING WALL (BY OTHERS)

PROPOSED 6" CONCRETE STAND UP CURB (TYP)

ADJACENT PROPERTY BOUNDARY (TYP)

EXISTING SUBJECT PROPERTY BOUNDARY (TYP)

STORMWATER INFORMATION

IMPERVIOUS AREA SUMMARY:
EXISTING IMPERVIOUS AREA: 37,700 SF
PROPOSED IMPERVIOUS AREA: 47,430 SF
INCREASE IN IMPERVIOUS AREA: 9,730 SF
DISTURBED AREA SUMMARY:
DISTURBED AREA WITHIN PROPERTY: 1.70 ACRES
PERCENT OF PROPERTY DISTURBED: 78.2%
TOTAL DISTURBED AREA: 2.00 ACRES

DEVELOPMENT DATA

PROPERTY ADDRESS: 309 COLLEGIATE CIR
PIN NUMBER: 0710-96-3451
PROPERTY SIZE: 2.174 AC
ZONING REVIEW: TOWN OF MONTREAT
EROSION CONTROL REVIEW: TOWN OF MONTREAT
STORMWATER REVIEW: TOWN OF MONTREAT
ZONING CLASSIFICATION: I/R

PROPERTY OWNER: MOUNTAIN RETREAT ASSOC.
CONTACT: RICHARD DUBOSE
ADDRESS: 401 ASSEMBLY DR
ADDRESS 2: MONTREAT, NC 28757
EMAIL: RDUBOSE@MONTREAT.ORG
PHONE: 828-669-2911
DEVELOPER: MOUNTAIN RETREAT ASSOC.
CONTACT: RICHARD DUBOSE
ADDRESS: 401 ASSEMBLY DR
ADDRESS 2: MONTREAT, NC 28757
EMAIL: RDUBOSE@MONTREAT.ORG
PHONE: 828-669-2911
ENGINEER: BROOKS ENGINEERING
CONTACT: JOHN KINNAIRD
ADDRESS: 17 ARLINGTON ST
ADDRESS 2: ASHEVILLE, NC 28801
EMAIL: JKINNAIRD@BROOKSEA.COM
PHONE: 828-232-4700

PROPOSED 4595 SF PERMEABLE
PAVER PARKING AREA

PROPOSED RETAINING WALL (BY OTHERS)

PROPOSED ASPHALT PARKING AREA



Richard DuBose
President

PO Box 969
Montreat, NC 28757
828.419.9800

Design Addendum:

While the Planned Unit Development application process does not necessarily require detailed architectural specifications at this stage, Montreat Conference Center remains committed to the thoughtful design and construction of facilities that reflect the architectural beauty and character in the valley. We recognize the importance of ensuring that any new development contributes positively to the visual and environmental fabric of the community. To that end, we offer the following images as representative examples of the architectural approaches, materials, and design vocabulary we are actively pursuing as part of this project.

A handwritten signature in blue ink, appearing to be "RD", is written over the printed name "Richard DuBose".

Richard DuBose

5/19/24