

ORANGE COUNTY BOARD OF COMMISSIONERS

AGENDA

BOCC Regular Work Session
May 10, 2016
Meeting – 7:00 p.m.
Southern Human Services Center
2501 Homestead Road
Chapel Hill, NC

- | | | |
|----------------|----|--|
| (7:00 – 8:45) | 1. | Discussion of the Proposed Orange County FY 2016 - 2020
Affordable Housing Strategic Plan |
| (8:45 – 9:20) | 2. | Presentation on Orange County Employment and Labor Statistics |
| (9:20 – 10:00) | 3. | Orange County Property Naming Policy |

Orange County Board of Commissioners' regular meetings and work sessions are available via live streaming video at http://www.orangecountync.gov/departments/board_of_county_commissioners/videos.php and Orange County Gov-TV on channels 1301 or 97.6 (Time Warner Cable).

**ORANGE COUNTY
BOARD OF COMMISSIONERS**

ACTION AGENDA ITEM ABSTRACT

Meeting Date: May 10, 2016

**Action Agenda
Item No. 1**

SUBJECT: Discussion of the Proposed Orange County FY 2016 - 2020 Affordable Housing Strategic Plan

DEPARTMENT: Housing, Human Rights and Community Development

ATTACHMENT(S):

- A. Comments from the Orange County Housing Coalition
- B. Comments from the Health Department
- C. April 5, 2016 Board Meeting Minutes Excerpt
- D. Draft of the Executive Summary of the Proposed Orange County 2016 – 2020 Affordable Housing Strategic Plan

INFORMATION CONTACT:

Audrey Spencer-Horsley, Housing, Human Rights and Community Development Director, (919) 245-2492

PURPOSE: To discuss the Draft of the *Proposed Orange County FY 2016 - 2020 Affordable Housing Strategic Plan*.

BACKGROUND: On April 5, 2016 the Board received the *Proposed 2016 – 2020 Affordable Housing Strategic Plan* (AHSP) that has been developed as the County's long-range vision for addressing affordable housing needs over the next five (5) years. After receiving an overview of the Plan by the Director of Housing, Human Rights and Community Development (Director) and public comment, the Board requested that the Director conduct additional community outreach on the AHSP prior to holding a work session planned for May 10, 2016.

The Orange County Board of Commissioners met on January 29, 2016 for an annual retreat. In reviewing the previous six goals the Board has used since 2009, affordable housing was a high priority under Goal 1: Ensure a community network of basic human services and infrastructure that maintains, protects, and promotes the well-being of all county residents. The Board stated that there be a priority for decent, standard housing options for all residents regardless of household income level and that funds be used to develop a targeted number of units (set numerical goal), especially rentals. The AHSP addresses this priority of the Board.

At the meeting of the Board on April 5th, the Director provided a summary of the needs data in the AHSP that includes the Towns of Chapel Hill, Carrboro and Hillsborough. The Director provided an overview of the goals, strategies, actions and recommendations in AHSP to address the widening gap between needs and affordable housing countywide as well as public policies and actions affecting affordable housing in the County. The AHSP identifies goals for the next five years, and proposes strategies and opportunities to meet those goals in

partnership with the Towns, nonprofits, Advisory Boards and Commissions, the private sector, faith communities, other County agencies, state and federal resources and the community at-large.

In order to begin to meet the need for affordable housing in Orange County, particularly residents who are most cost burdened at 30% to 50 % median income as discussed in the AHSP, the ASHP has an overarching shared countywide goal of 1,000 affordable housing units. The shared countywide goal of 1,000 units are to be provided through acquisition, construction, urgent repair, assisted housing, and rehabilitation of the existing housing stock over the next five (5) years. At least 500 of the units are recommended to be new assisted rental units through the leveraging of funds from the planned November 2016 \$5 million bond referendum for affordable housing.

The priority for new rental housing would be 25 – 30% (250 – 300 units) of the units serving extremely and very low income households, at or below 30% – 50 % of median income and another 25 - 30% (250 – 300 units) serving special needs populations including the homeless, persons with physical and or mental disabilities and the elderly. The highest priority is recommended for these populations with the greatest hardships of cost burden and or the least options for affordable housing. The remaining 40 – 50 % (400 – 500) units would serve individuals and households that are at or below 50 - 80% of median income for the County.

The AHSP has identified ten goals with strategies provided for each goal and action and recommendations to implement them. The thirty three: Actions (A)/Recommendations(R) are listed with each goal and set of strategies. Those numbered with (AR) are Actions/Recommendations staff is requesting to pursue immediately and or require funding decisions. With the Board's approval of the AHSP, staff will bring back to the Board detailed work plans and metrics in collaboration with community and municipal partners and County agencies.

The AHSP builds on the analyses, data, community-wide input, findings and strategies in the Orange County *Consolidated Plan* and the *Analysis of Impediments* to fair housing choice prepared for the Orange County HOME Consortium that is comprised of Orange County and the Town of Carrboro, Town of Chapel Hill and Town of Hillsborough. The AHSP also included review and consideration of existing affordable housing plans of the Towns and studies and plans of County Advisory Boards and Commissions. This included the County's Comprehensive Plan and Unified Development Ordinance, Aging Plan and Plan of the Partnership to End Homelessness among numerous other plans and studies on affordable housing in the County, region and nationally that have been prepared recently and over the years. What has been the consistent story is the need is great and immediate and the lack of affordable housing has continued to worsen over the years.

The AHSP identifies the critical need for affordable housing for individuals and households of extremely and very low income and for population groups with special needs including the homeless, persons with physical and or mental disabilities and the elderly. The AHSP reviewed existing affordable housing programs and tools of the County and covers an assessment of the County's housing stock. This included examining mobile home parks of the County, a source of affordable housing; publicly owned land and other development opportunities; and challenges for preserving and increasing the supply of affordable housing given the County's existing and planned infrastructure and access to transportation, employment, services and other community assets.

The Executive Summary including goals, strategies and action/recommendations are attached. **The link to the entire draft AHSP document is:**

www.orangecountync.gov/draftahsp.pdf

As requested by the Board, additional community meetings and outreach have been conducted with nonprofit providers, various County Boards and Commissions, community organizations and residents in need of decent, sound affordable housing. This outreach provided an additional opportunity for the public, various agencies and other interested parties to have further input into the AHSP and comment on the goals, strategies and actions and recommendations. Community meetings among other opportunities to receive public comment included the following:

- Community Meeting - March 29, 2016, 6:00 PM, Whitted Building
- State of the Community Report and Conversations, Housing Breakout Sessions (2), April 5, 2016, 7:30 AM, sponsored by the Triangle Community Foundation in partnership with the Chapel Hill Carrboro Chamber of Commerce, UNC Friday Center, Chapel Hill
- Board of Commissioners Meeting – April 5, 2016, 7:00 PM, Whitted Building
- Partnership to End Homelessness – April 6, 2016, 5:30 PM, Southern Human Services Center (SHSC)
- Orange County Affordable Housing Coalition – April 8, 2016, 9:30 AM, 88 Vilcom Center Dr., #L110, Chapel Hill
- Human Relations Commission – April 11, 2016, 6:00 PM, SHSC
- Affordable Housing Advisory Board – April 12, 2016, 6:00 PM, SHSC
- Housing Choice Voucher Resident Advisory Group, Community Empowerment Fund – April 13, 2016, 5:30 PM, 108 W. Rosemary Street, Chapel Hill
- N.C. Cooperative Extension, Nutrition Program Class (Hispanic/Latino Community)/April 19, 2016, Hillsborough
- Orange County Housing Authority, April 20, 2016, 6:00 PM, SHSC
- Orange County Water and Sewer Authority (OWASA) Affordability Outreach Partners Meeting (Nonprofits and Town Representatives), April 22, 2016, 11:30 AM, Community Room, 400 Jones Ferry Rd., Carrboro
- Rogers Eubanks Neighborhood Association/Unity Board Working Group – As requested via email April 27, 2016 a summary from draft document preparing to present soon.
- El Centro Hispano – Durham Tech ESL Class (2nd Group Requested) – 7:00 PM, April 28, 2016, 201 W. Weaver St., Carrboro
- Orange County Department on Aging, Seniors Spanish Social Club – April 28, 2016, Seymour Center, Chapel Hill, NC
- Karen Community – April 29, 2016, 5:00 PM, Carrboro United Methodist Church, Community Center, 200 Hillsborough Rd., Carrboro
- Affordable housing presentation on Orange County by graduate students of the Department of City and Regional Planning at UNC-Chapel Hill with representatives from the Affordable Housing Advisory Board, Orange County Housing Authority and Department staff, May 2, 2016, Whitted
- Cedar Grove Community Meeting – May 2, 2016, 6:00 PM, Mt. Zion A.M.E. Church, 5124 NC Highway 86 N, Hillsborough
- Orange County Planning Board – May 4, 2016, 7:00 PM, West Campus, Hillsborough

- Orange County Department on Aging, Graduates of Project EngAGE, May 5, 2016, Passmore Center (Central), Hillsborough
- Efland Community – May 9, 2016, 6:00 PM, Efland Ruritan Building, 3009 Forest Ave, Efland
- Orange County Advisory Board on Aging, May 10, 2016, Passmore Center (Central), Hillsborough

A summary of the comments from these meetings will be presented at the Board's Work Session on May 10th. Written comments received are attached and include the meeting summary from the County Clerk for the Board's April 5, 2016 meeting; comments from the Orange County Housing Coalition and from the Health Department. It should also be noted that a Disability Awareness Council Meeting was scheduled for April 22, 2016, 1:30 PM during their conference, but cancelled due to the leader of the group requiring unexpected surgery.

The Proposed AHSP and community comments received are scheduled to be discussed at the Work Session of the Board on May 10th at SHSC.

FINANCIAL IMPACT: There is no financial impact regarding the discussion of the *Proposed 2016 – 2020 Affordable Housing Strategic Plan*.

SOCIAL JUSTICE IMPACT: The following Orange County Social Justice Goals are applicable to this agenda item:

- **GOAL: ENSURE ECONOMIC SELF-SUFFICIENCY**

The creation and preservation of infrastructure, policies, programs and funding necessary for residents to provide shelter, food, clothing and medical care for themselves and their dependents.

The creation and preservation of affordable housing options helps to meet a basic need and advances economic self-sufficiency.

- **GOAL: CREATE A SAFE COMMUNITY**

The reduction of risks from vehicle/traffic accidents, childhood and senior injuries, gang activity, substance abuse and domestic violence.

Affordable housing options allow individuals to reduce risks associated with being unhoused.

- **GOAL: FOSTER A COMMUNITY CULTURE THAT REJECTS OPPRESSION AND INEQUITY**

The fair treatment and meaningful involvement of all people regardless of race or color; religious or philosophical beliefs; sex, gender or sexual orientation; national origin or ethnic background; age; military service; disability; and familial, residential or economic status.

RECOMMENDATION(S): The Manager recommends that the Board consider the comments provided, discuss the *Proposed 2016 – 2020 Affordable Housing Strategic Plan* and provide direction to staff to provide the final AHSP.

Attachment A

May 3, 2016

Dear Board of County Commissioners,

On behalf of the Orange County Affordable Housing Coalition (OCAHC), I would like to express our appreciation to the Board of County Commissioners and staff for the opportunity to provide comments on the Draft Affordable Housing Strategic Plan. Audrey Spencer-Horsley met with the Coalition on April 8th to answer questions about the plan, and encouraged us to submit our comments in writing prior to the May 10 work session. The comments below reflect the experience and expertise of the members of the Coalition, who together have decades of experience in the affordable housing arena, and who are deeply committed to working together toward an Orange County where everyone has a decent, affordable place to live.

We are grateful to the staff for the work that went into the creation of this plan. We applaud the focus that the commissioners and staff are placing on the critical and growing need for more affordable housing in our community. The plan sets an ambitious goal of 1000 units of affordable housing over five years, and presents a broad range of needs and strategies. We support such an ambitious goal wholeheartedly. We feel the next step is to distil down the broad goals and strategies into a concise, specific, actionable plan that prioritizes goals and includes site specific strategies, budgets, sources of resources, and timelines. We recommend that this implementation plan be created through a truly collaborative process. The Coalition has suggested to Ms. Horsley that the process could be modeled on the Town of Chapel Hill's Mayor's Task Force on Affordable Rental Housing, which utilized community collaboration to produce an actionable plan within a short time frame.

Below are some specific comments and concerns in regards to the 2016-2020 Draft Affordable Housing Strategic Plan.

1. The plan should clarify that affordable units in the pipeline, but not yet funded, will count toward the overall goal of 1,000 units. Also, the language describing the composition of the 1,000 units is somewhat confusing in terms of the overlap of income and other designations (seniors, special needs, etc.).
2. We suggest that the plan clearly show how the data supports each of its goals and strategies. The format of the plan, with the data listed separately, makes it difficult to see how the goals and strategies were derived from and relate to the data. For example, there is no analysis of the housing needs of people experiencing or at risk of homelessness and no information about the current inventory and unmet need for housing for this population, including permanent supportive housing, rapid re-housing, affordable rental housing, and emergency shelter. AR16.2 states a Domestic Violence shelter should be created; there is no supporting evidence this is the greatest need or most effective use of resources.
3. The plan should reference goals in existing plans of the other jurisdictions, such as Carrboro's Affordable Housing Strategy Report, the Chapel Hill's Affordable Housing and Affordable Rental Housing Strategies, and the Partnership to End Homelessness' Plan to End Homelessness.

4. The plan should reference the Greene Tract as a future site for affordable housing, and the opportunity it offers for collaborative development with the other jurisdictions and affordable housing community partners.
5. We would like to emphasize the importance of the Action/Recommendations under Goal 9 of the plan. Without a reliable source of funding for affordable housing, it will be impossible to approach the overarching goal of 1,000 units. Partnering with community and municipal partners will leverage additional resources and increase the efficient use of funds.
6. The plan recommends that the County expand its current Urgent Repair and other repair programs. We agree that there should be a significant expansion of existing repair programs, but believe that there should be thoughtful consideration of how best to maximize the resources for repairs through increased collaboration with non-profits already actively engaged in repair programs. It is likely that resources could be used more efficiently and stretched further by partnering with those programs, which are able to leverage outside dollars and volunteers,
7. The plan recommends that the County Housing Authority manage and maintain county-owned affordable housing inventory. We recommend that rather than creating an entirely new capacity within the Orange County Housing Authority, the County negotiate with a range of affordable housing providers in the County, to manage and maintain affordable housing inventory owned by the County. A range of affordable housing providers exist in our County with the capacity, knowledge, databases, application processes, and skillset to maintain and manage affordable rental housing inventory, some of whom are actively seeking opportunities to build new units in Orange County. Other possible providers include both current governmental and non-governmental affordable housing development managers. In short, we recommend not adding new functions in property management that could be met by other community resources more efficiently and in a more community-based manner.
8. We recommend revising A/R 13 to read as follows: *Expand resources to recruit and retain providers of rental housing for the Housing Choice Voucher program, permanent supportive housing, rapid re-housing, and veteran housing programs. Assess operational, administrative, and programmatic changes that can improve landlord satisfaction with engagement with these subsidy programs, and dedicate resources to these improvements.*
The lack of landlords and property managers accepting housing subsidies in Orange County is a dire situation for beneficiaries. This challenge leads to an overall greater deficit in the affordable housing supply in our community. This recommended change in the plan emphasizes the magnitude of this problem.
9. Under Goal 3, we recommend adding a new Action/Recommendation:

Incorporate a preference for homelessness status in the review and approval process for new recipients of Housing Choice Vouchers. One other strategy to support the local Continuum of Care's efforts to house families who are homeless is to leverage to a

greater extent the existing resources in our community to serve this goal. This includes the Housing Choice Voucher program. While other preferences would certainly remain a part of the determination (whether those pertain to domestic violence, disability status, or income), adding and tracking a preference for homelessness would be a valuable contribution from the Housing Department in addressing homelessness issues. (Since 2013, HUD has directed PHAs and CoCs to work in partnership to prevent and end homelessness: <https://www.hudexchange.info/news/resources-for-coc-and-pha-collaboration-to-end-homelessness/>. Establishing a homeless preference can be a concrete step to solidify our common goals.)

10. For AR1, we suggest including a sentence that allows consideration of denser developments on the right site, even if it is a small site.
11. For AR2, we suggest that proposals be evaluated and scored by Orange County staff before being passed on to Advisory boards to review and make funding recommendations to the BOCC. This is a lesson learned from members' experience on the Town of Chapel Hill's Housing Advisory Board, which makes recommendations for funding from the Town's Affordable Housing Reserve.
12. We strongly support Goal 10, and suggest a comprehensive, county-wide approach that determines how we can best use our assets and tools to address our needs instead of adopting a piecemeal approach. We encourage the creation of an intergovernmental group with all town managers and planning staff to coordinate funding efforts and projects. We should not have three or four similar, but differing governmental strategies to address affordable housing challenges within the County

Again, we are grateful for the opportunity to provide input, and happy to provide additional clarification to any of the above comments and suggestions. We look forward to hearing the discussion about the plan at the May 10 work session.

In partnership,



Susan Levy, Chair
On behalf of the Orange County Affordable Housing Coalition

The following individuals and organizations are active participants in the Orange County Affordable Housing Coalition.

- Delores Bailey ([EmPOWERment Inc.](#))
- Nate Broman-Fulks ([Town of Carrboro](#))
- Robert Dowling ([Community Home Trust](#))

- Liz Evans (Weaver Community Housing Association & Just Housing)
- Jesse Gibson (Chapel Hill-Carrboro NAACP)
- Dan Levine (Self-Help)
- Susan Levy (Habitat for Humanity of Orange County)
- Sarah Osmer Vinas (Town of Chapel Hill)
- Jamie Rohe (Affordable Housing Advocate and Volunteer)
- Corey Root (Orange County Partnership to End Homelessness)
- Allan Rosen (Inter-Faith Council for Social Service)
- Devin Ross (Justice United)
- Mary Jean Seyda (CASA)
- James Stroud (Centre for Homeownership & Economic Development)
- Hudson Vaughan (The Jackson Center)
- Tina Vaughn (Chapel Hill Department of Housing)
- Maggie West (Community Empowerment Fund)

Suggestion #1: Include background information on public health hazards of secondhand smoke in multi-unit housing and commit to providing housing free of secondhand smoke.

Include Background Info on Secondhand Smoke: In terms of housing and health, secondhand smoke is an important issue because of the fire safety risk (smoking-related fires are the number one cause of fatal home fires), health (due to exposure from neighboring units), and to minimize maintenance costs when turnover occurs. Specifically, secondhand smoke is a leading cause of asthma and other respiratory diseases for children — diseases that disproportionately affect low-income families. Asthma is one of the top reasons why children miss school, depriving them of precious learning time. Secondhand smoke is a known trigger for asthma, which can lead to expensive emergency room visits — a financial burden on parents already coping with the emotional toll of caring for their sick child (CDC. Asthma: Common Asthma Triggers). In addition, exposure to secondhand smoke can cause sudden infant death syndrome and respiratory symptoms such as cough and wheeze, middle ear infections, and slowed lung growth and reduced lung function in children, and increased risk of stroke in adults (US DHHS, Surgeon General Report, 2006).

Children in Orange County are exposed to secondhand smoke in rental housing. More than 1 in 3 nonsmokers who live in rental housing in the U.S. are exposed to secondhand smoke, and 2 out of every 5 children (including 7 out of 10 African American children) are exposed involuntarily to secondhand smoke through their housing (CDC 2015 Vital Signs report). In our region of North Carolina, 1 out of 10 residents smelled secondhand smoke drifting into their home in the past seven days (NC BRFSS, 2014).

In North Carolina, there is a significant disparity in exposure to secondhand smoke inside a person's home drifting in from a neighboring apartment or outside by income, education level, and race/ethnicity. In nearly all categories, the rates are two to three times higher for those who are poor, less educated, and Black (vs. White), with the largest disparity seen based on income:

Black (non-Hispanic) 15.8%	vs.	White (non-Hispanic) 8.6%
Less than High School 14.4%	vs.	College Graduate 7.0%
Income < \$15,000 18.8%	vs.	Income of \$75,000+ 5.3%

Source: NC BRFSS (2014) <http://www.schs.state.nc.us/data/brfss/2014/nc/all/outside.html>

Because current air filtration systems do not filter out the harmful elements of secondhand smoke, a smoke-free policy is the best way to protect children, people with asthma, and others vulnerable populations to the effects of secondhand smoke.

Suggested Strategy Edit: Goal 1. 1.10: Improve the public infrastructure through rehabilitation, reconstruction, and new construction that will facilitate affordable housing and economic development. *Consistent with the requirement of the North Carolina Housing Finance Agency, require that any new construction or renovation be smoke-free. (Reference: <http://www.niqasp.org/wp-content/uploads/2015/05/NCAH-News-Release-Smokefree-Housing-Finance-Tax-Credits.pdf>)*

Suggested Action/Recommendation Edit: Goal 1. AR: Require that any multi-family housing units developed on county or other publically owned property, or with support from county funds, be required to have a smoke-free policy consistent with that required by the North Carolina Affordable Housing Finance Agency to receive tax credits.

Suggestion #2: Ensure that undocumented immigrants, especially those who have Limited English Proficiency (LEP), are aware of their rights and responsibilities as renters.

Comment: Support for Limited English Proficiency residents is mentioned in the Fact Sheet on the LEP Program, but the text of the AHSP does not identify the barriers they may face in securing and maintaining safe, decent and affordable housing. There is also no mention of immigration documentation status as a barrier to safe, decent, and affordable housing, although fears related to retaliation likely drive the housing standards and affordability down for this population.

Include Background Info on Undocumented Immigrants & Housing: For some undocumented immigrants, lack of credit or rental history in the U.S. and not having a Social Security number or U.S.-issued identification may prevent them from finding affordable housing, even if the law does not require renters to have that documentation. Once they secure housing, the housing may not be maintained to the minimum standards, with landlords not doing necessary repairs, reporting immigrants to law enforcement for minor problems, or unfairly withholding deposits or charging additional fees. In addition, language barriers and sometimes low literacy levels can be causes of discrimination and can introduce challenges in securing safe, decent and affordable housing.

Tenants, especially those with limited English Proficiency, may be unaware of their rights and responsibilities, fearing retaliation or other negative consequences if they complain to the landlord or to local code enforcement.

(See Advocates for Human Rights, Moving from Exclusion to Belonging, Chapter 5 Housing – available at: http://www.theadvocatesforhumanrights.org/uploads/chapter_5_housing.pdf)

Suggested Strategy Edit: Goal 3. 3.5: Ensure low literacy resources on tenant rights and responsibilities are available in appropriate languages, such as Spanish, Karen, and Burmese, and are proactively distributed through community partners.

Suggested Action: Review current data on LEP population’s housing challenges, conduct needs assessment, and provide linguistically-accessible community-based classes to immigrant and refugee groups to inform of rights and responsibilities.

Questions re LEP Program: Page 157 in the AHSP - What is the LEP program? Have they had any housing-specific accomplishments?

Minor edits

- Page 157 should say “residents” not “citizens” since many of our LEP and immigrant OC residents are not technically citizens
- Table of Contents – Typo in “Executive” Summary

Suggestion #3: Goal 2. AR12: Include the Board of Health and Family Success Alliance Advisory Council among those groups who will be engaged in developing the guiding principles, general guidelines, and/or design criteria/considerations.

Excerpt from April 5, 2016 BOCC meeting

F. Proposed Orange County FY 2016 - 2020 Affordable Housing Strategic Plan

The Board received the Draft of the *Proposed Orange County FY 2016 - 2020 Affordable Housing Strategic Plan*.

Bonnie Hammersley said the objective this evening is to do an overview of the presentation, and a more in depth conversation will occur at the work session on May 10.

Audrey Spencer Horsley, Housing, Human Rights, Community Development Director, reviewed the following information:

PURPOSE: To receive the Draft of the *Proposed Orange County FY 2016 - 2020 Affordable Housing Strategic Plan*.

BACKGROUND: This *Proposed 2016 – 2020 Affordable Housing Strategic Plan* (AHSP) has been developed as the County's vision for addressing affordable housing needs over the next five (5) years. Affordable housing is a foundation for achieving self-sufficiency and promotes stronger, more inclusive communities.

The Orange County Board of Commissioners met on January 29, 2016 for an annual retreat. In reviewing the previous six goals the Board has used since 2009, affordable housing was a high priority under Goal 1: Ensure a community network of basic human services and infrastructure that maintains, protects, and promotes the well-being of all county residents. The Board stated that there be a priority for decent, standard housing options for all residents regardless of household income level and that funds be used to develop a targeted number of units (set numerical goal), especially rentals. The AHSP addresses this priority of the Board.

The AHSP analyzes the current rental and homeowner housing market, examines housing market trends and economic trends, specifically in relation to household income and identifies the widening gap between needs and affordable housing countywide as well as public policies and actions affecting affordable housing in the County. The AHSP identifies goals for the next five years, and proposes strategies and opportunities to meet those goals.

In order to begin to meet the need for affordable housing in Orange County, particularly residents who are most cost burdened at 30% to 50 % median income as discussed in the AHSP, the ASHP has an overarching shared countywide goal of creating 1,000 assisted affordable housing units in five years. The shared countywide goal of 1,000 assisted units are to be provided through acquisition, construction, urgent repair, assisted housing, and rehabilitation of the existing housing stock over the next five (5) years.

At least 500 of those units are recommended to be new assisted rental units that do not exist today. They would be created through the planned November 2016 \$5 million bond referendum for affordable housing. Of those 500 new units, twenty-five to thirty percent (25%–30%) will be targeted to serve extremely and very low-income households, at or below 30% – 50% of median income. Another twenty-five to thirty percent (25%-30%) of the new units would be targeted to serve special needs populations including the homeless, persons with physical and/or mental disabilities and older adults. The remaining 500 units would be units provided for individuals and households that are at or below 50-80% of median income for the County and would include rental and homeownership units.

The AHSP has identified ten goals with strategies provided for each goal and action and recommendations to implement them. The thirty-three: Actions (A)/Recommendations(R) are listed with each goal and set of strategies. Those numbered with (AR) are Actions/Recommendations staff is requesting to pursue immediately and or require funding

Excerpt from April 5, 2016 BOCC meeting

decisions. With the Board's approval of the AHSP, staff will bring back to the Board detailed work plans and metrics in collaboration with community and municipal partners and County agencies.

The ASHP builds on the analyses, data, community-wide input, findings and strategies in the Orange County *Consolidated Plan* and the *Analysis of Impediments* to fair housing choice prepared for the Orange County HOME Consortium that is comprised of Orange County and the Town of Carrboro, Town of Chapel Hill and Town of Hillsborough. The AHSP identifies the critical need for affordable housing for individuals and households of extremely and very low income and for population groups with special needs including the homeless, persons with physical and or mental disabilities and the elderly.

The AHSP reviewed existing affordable housing programs and tools of the County and covers an assessment of the county's housing stock. This included examining mobile home parks of the County, a source of affordable housing; publicly owned land and other development opportunities; and challenges for preserving and increasing the supply of affordable housing given the County's existing and planned infrastructure and access to transportation, employment, services and other community assets.

Community meetings and outreach have been planned with nonprofit providers and various community organizations. This provides an additional opportunity for the public, various agencies and other interested parties to have further input into the AHSP and comment on the goals, strategies and actions and recommendations.

Commissioner Dorosin said he appreciated the target numbers. He asked if 500 of the targeted housing units are going to be new rental units, which do not currently exist. He asked if these estimated numbers are starting from scratch or adding to an existing pool on affordable rental properties.

Audrey Spencer Horsley said the current inventory is a rough estimate, as of now. She counted units where she knew she was not double counting. She said the goal is to look at everything that has been funded by Orange County.

Audrey Spencer Horsley said to date there are 560 housing choice vouchers units, and are not currently maxed out on the number of units where federal assistance could be received. She said some of the goals are to incentivize the housing choice program, determine how to bring on more stock, and to help some participants to become homeowners. She said the maximum number of units is 623. She said there are also 449 low-income, tax credit properties, 214 rental units and 299 homeowner units assisted through the Home program.

Audrey Spencer Horsley said 177 units were completed through the bond of 1997, and there is a conservative estimate of 175 units completed through the bond of 2001. She said there are approximately 2000 assisted units, and 550-600 units on homeowner side. She said there have also been approximately 400 homeowner urgent repairs.

Audrey Spencer Horsley said it is important to keep an eye on those renting private housing stock, as some of these can be affordable due to age or necessary updates. She said there may be owners willing to sell rather than upgrade themselves, which may be a way to keep renters in their homes.

Audrey Spencer Horsley reviewed a listing of upcoming community meetings. She said the goal of these meetings is to inform as many members of the community as possible.

Commissioner Price asked if mobile homes were being counted.

Audrey Spencer Horsley said mobile homes are counted in the overall housing stock, and there is no differentiation between rentals and owned.

Excerpt from April 5, 2016 BOCC meeting

ORANGE COUNTY
AFFORDABLE HOUSING STRATEGIC PLAN
Board of Orange County Commissioners
Presentation
March 22, 2016

AFFORDABLE HOUSING STRATEGIC PLAN

- County's long-range vision for addressing affordable housing needs over the next five (5) years.
- AHSP analyzes the current housing market, examines trends in the housing market economic opportunities of Orange County
- Identifies shortcomings in affordable housing countywide and proposes strategies to meet those goals.

1,000 Units in Five Years

- **Create 1,000 Affordable Housing Units in Five Years:**
 - 250 units – targeted for very low income individuals and household
 - 250 units – targeted for special needs populations
 - 500 units – targeted for 50% to 80% median income
 - Countywide shared goal
 - Acquisition, construction, urgent repair, assisted housing, and rehabilitation

Goal 1: Continuum of Affordable Housing – Action Recommendations

- AR1: Publicly Owned Small Parcel Development
- AR2: Development and Maintenance of Inventory
- AR3: Housing Authority as Property Manager
- AR4: Design Competition for larger scale development
- AR8: Preserve inventory of mobile homes
- AR11: Community plan for housing emergencies; coordinated intake for homeless seeking services

Goal 2: Increase Housing and Employment, Reduce Poverty

- AR12: Strengthen interagency collaboration and draw on existing expertise and capacity to implement the Strategic Plan
 - Family Success Alliance
 - Master Aging Plan
 - Partnership to End Homelessness
 - Advisory Boards and Commissions
 - Housing Authority
 - Municipal Partners

Goal 3: Provide housing and services to populations with special needs

- AR16: Address unmet community housing needs in collaboration with partners
 - Emergency shelter for individuals and families
 - Domestic violence shelter
 - More permanent supportive housing for people with disabilities and young people experiencing homelessness

Goal 4: Provide adequate supply of housing options for older residents

Excerpt from April 5, 2016 BOCC meeting

- AR 19: Expand the Urgent Repair Program to serve 25 additional older residents or people with disabilities
 - Add \$150,000 to \$200,000 to current budget
 - Eliminate the current waiting list

Goal 5: Preserve current supply of rental housing and prevent future loss

- AR 21: Increase funding available for housing rehabilitation projects
 - Leverage maximum funding through the North Carolina Housing Finance Agency
 - Add \$200,000 to \$250,000 in County funding for older housing rehabilitation – an additional seven homes annually.

Goal 6: Improve knowledge of fair housing laws and regulations

- A 23: Strengthen education and outreach programs
 - Fair Housing Act
 - Orange County Human Relations Ordinance

Goal 7: Access to job opportunities and skill development

- AR 24: Study, plan and develop bus routes or other public transportation alternatives
 - Access to business nodes for employment
 - Access to job training and other supportive services and community amenities

Goal 8: Provide staffing to deliver high quality housing services

- AR 25: Provide leadership and support to community partners to implement the strategic plan
 - Continue broad community/stakeholder involvement
- AR 25: Continue to strengthen internal management of affordable housing programs and services
 - Including cooperation and support of other agencies
- Track and report on implementation of the strategic plan to the Board of County Commissioners and community partners

Goal 9: Identify resources to help meet the needs identified in the plan

- AR28: Identify a dedicated source of funding and a plan of implementation
- AR29: Maintain a set aside of funding for land banking and property acquisition
- AR30: Partner with community and municipal partners on projects, grant applications
- AR31: Support opportunities to partner with community and municipal partners on implementing strategies

Goal 10: Encourage and support intergovernmental cooperation

- AR32: Continue joint planning efforts related to outside funding opportunities
- AR33: Collaborate and exchange information with municipalities on affordable housing issues
 - Funding
 - Planning
 - Training
 - Problem solving
 - Civic engagement
 - Building community partnerships

Excerpt from April 5, 2016 BOCC meeting

Commissioner Rich referred to goals 30 and 31 and asked if conversations with municipal partners have started and how the partnerships are taking shape.

Audrey Spencer Horsley said one-on-one conversations have been occurring. She gave the example of doing outreach with non-profits. She said four non-profits responded to their questionnaire, which provided an overview of the strategic plans of these non-profits, and can in turn allow all to be more effective partners.

Audrey Spencer Horsley said meetings with Chapel Hill Housing staff have also occurred.

Commissioner Rich said this should be a countywide effort including the municipalities and not everyone acting in silos.

Commissioner Jacobs said determining mobile home ownership versus renters is important information in order to be able to better plan going forward with the affordable housing plan.

Audrey Spencer Horsley said gathering this information will require a more intensive study which she hopes to accomplish at a later date.

Bonnie Hammersley said mobile homes are being reviewed through the tax office and she hopes to have these figures for the May 10 work session.

Commissioner Jacobs referred to the fifth bullet point, on page 13 of document, and asked if the term "white" could be clarified, as the statistic seems to be inaccurate.

Audrey Spencer Horsley said the households that were identified as white represent the largest percentage of ownership in that group.

Commissioner Jacobs asked if this information could be provided for all ethnicities.

Commissioner Jacobs said Mebane is building much more housing than Orange County, and it would be worth reviewing what kind of housing stock is in the Extraterritorial Jurisdiction (ETJ) of Mebane.

Commissioner Price asked if in planning for these 1000 units, is it being considered that some people living in mobile homes may want to move out into a stick built home.

Audrey Spencer Horsley said it is important to know what the property owner's intent is.

Commissioner Price said to include these types of people in the calculations.

PUBLIC COMMENT:

Robert Dowling thanked the Board of Commissioners for their long-standing commitment to affordable housing. He commended Audrey Spencer Horsley for this strategic plan. He said the plan would benefit from better focus, perhaps reducing it to 6-8 priorities. He said affordable housing is a priority for all the other local municipalities, and they have provided funding for their own strategic plans. He said all assets should be leveraged together for maximized impact. He said this effort is working against the tide and a group effort is essential.

Robert Dowling said the plan should recognize projects that are already in place or forthcoming.

Chair McKee said this plan is a beginning point and it is being reviewed and defined. He said the Board committed to being on the same page as other governmental entities.

Dan Levine said he is active with the Orange County Affordable Housing Coalition. He said he and others are here to thank the Board of County Commissioners for their commitment to affordable housing in Orange County and the funding through a bond. He also commended Audrey Spencer Horsley for this draft plan. He said they are here as a resource for Orange County.

Doris Bailey thanked Audrey Spencer Horsley and the Board of County Commissioners for realizing the need for affordable housing, especially for rental units.

Commissioner Price said there are a lot of community meetings upcoming, but none of them are north of Highway 70. She asked if it would be possible to add a meeting in Cedar Grove.

Excerpt from April 5, 2016 BOCC meeting

Audrey Spencer Horsley said yes.

Commissioner Pelissier referred to the issue of affordability, and said people are looking at both housing and transportation combined being 45% of their household income. She said as this plan moves forward, to consider transportation as a real part of the equation.

Commissioner Burroughs said she liked the set goals, and Audrey Spencer Horsley's explanation of where the 1000 units are coming from. She appreciated the balance between ownership and rental.

Commissioner Burroughs said mobile homes are a good source of affordable housing, but there needs to be a clear emergency service plan for those in mobile home parks.

Audrey Spencer Horsley said locating a community center near such communities is one option.

Commissioner Rich asked if a timeline for discussion of costs for the plan is known. She said she would like to look at this in a broader time frame, such as 5 or 10 years.

Bonnie Hammersley said this plan is broad so the Board could prioritize the options, knowing that all cannot be completed in one year. She said the plan over five years can be determined and the funding then allocated to accomplish the plan.

Commissioner Rich said how does this plan work given the Board's commitment to giving non-profits more funding, and asked if these funds will be in addition to this.

Bonnie Hammersley said this \$1 million will be part of the operating budget this year, per the BOCC direction. She said the County currently spends \$800,000, and the \$1 million includes the additional \$200,000 that the Board of County Commissioners approved last year.

Commissioner Rich asked if the extra \$200,000 will be distributed in a particular way.

Bonnie Hammersley said those decisions are at the Board's discretion.

Commissioner Rich said additional outside agency funding would not be affected by these funds.

Bonnie Hammersley said yes.

Commissioner Jacobs listed things he wanted more information on or wanted to highlight:

- Orange County Housing Authority – he does not know their capabilities, and he would like some information about Audrey Spencer Horsley's vision of this group's participation;
- Incentives – break them out in detail, and show how more incentives can be provided;
- Units – he said would like to talk about the type of units, not just the quantity;
- The 120 acres on the Greene Tract was not mentioned;
- Urgent home repairs – he is glad this was included;
- Suggestion to have some standards for those units being funded by the County, such as handicapped accessible; and
- A mobile home strategy is needed.

Audrey Spencer Horsley said the Greene Tract is included in large-scale development.

Audrey Spencer Horsley said the plan is a framework. She said when the BOCC prioritizes the goals and strategies, the discussion can go deeper into many of these phases and issues.

Commissioner Dorosin referred to the proposed mobile home strategy, and said the impetus for what he brought forward came from talking to people living in these mobile homes who are facing challenges. He said a strategy will not come to pass until there is a level of engagement with the actual renters or homeowners.

Commissioner Dorosin said the issue is how to actualize the overall plan and what can be accomplished based on needs, costs and maximizing expenses.

Excerpt from April 5, 2016 BOCC meeting

Commissioner Dorosin highlighted in the report the relationship of fair housing and racial and ethnic diversity in the context of affordable housing.

Commissioner Dorosin said he sees the future of the Orange County Housing Authority to be like the Chapel Hill Housing Authority: a government agency managing rental housing, and a quasi-department of the County.

Commissioner Rich referred to Hispanic families and asked if documented residents, undocumented residents, or both are being considered.

Commissioner Dorosin said these numbers probably include both documented and undocumented residents and are most likely understated.

Commissioner Price said many departments in Orange County support both documented and undocumented residents.

Commissioner Dorosin said housing funding may be different in this regard.

Chair McKee asked John Roberts to research this question and to bring an answer back to the BOCC.

Chair McKee referred to the Eno Haven project and said whatever action is taken, it is important not to isolate this community, and create a perceived low-income neighborhood. He said he supports lifting people, not isolating them.

Chair McKee referred to goal number 5, funding available for housing rehabilitation projects, and advocated an increase in this amount, as people like to stay in their homes.

Chair McKee said it is important for all numbers to align, across the County, Towns, agencies, etc.

Audrey Spencer Horsley said the numbers may not perfectly align, but the overall trends that the numbers show do align.

Commissioner Price said when it comes to this type of data, certain programs use just census data and more local entities use different sources for data.

Audrey Spencer Horsley referred to the existing minimum housing standards and said there is no way to enforce them. She encouraged the Board to think about this going forward, as it is important.

Orange County Affordable Housing Strategic Plan: 2016 - 2020

I. EXECUTIVE SUMMARY

A. NEED FOR AFFORDABLE HOUSING

Every resident of Orange County, North Carolina deserves a decent, safe, sound and affordable place to live, in a neighborhood that provides opportunities to succeed. The market alone is not always able to meet that need, and, accordingly, governments at all levels must work together to help. Orange County's shortage of affordable housing has reached a crisis. Much of the housing in Orange County is not affordable to low- and moderate-income households and working families who are oftentimes cost burdened by 30% or more in their housing costs.

This Orange County Affordable Housing Strategic Plan: 2016 -2020 (AHSP) has been developed as the County's long-range vision for addressing affordable housing needs over the next five (5) years. The AHSP analyzes the current housing market, examines trends in the housing market economic opportunities of Orange County, identifies shortcomings in affordable housing countywide, determines goals for the next five years, and proposes strategies to meet those goals.

The AHSP focuses on the status and interaction of four (4) fundamental conditions within the community:

- The rental and homeowner housing market;
- Economic trends, specifically in terms of household income;
- The provision of financial assistance for dwellings;
- Public policies and actions affecting affordable housing;

The methodology employed to undertake the AHSP includes:

- **Research**

Demographic data for the County for purposes of analysis included:

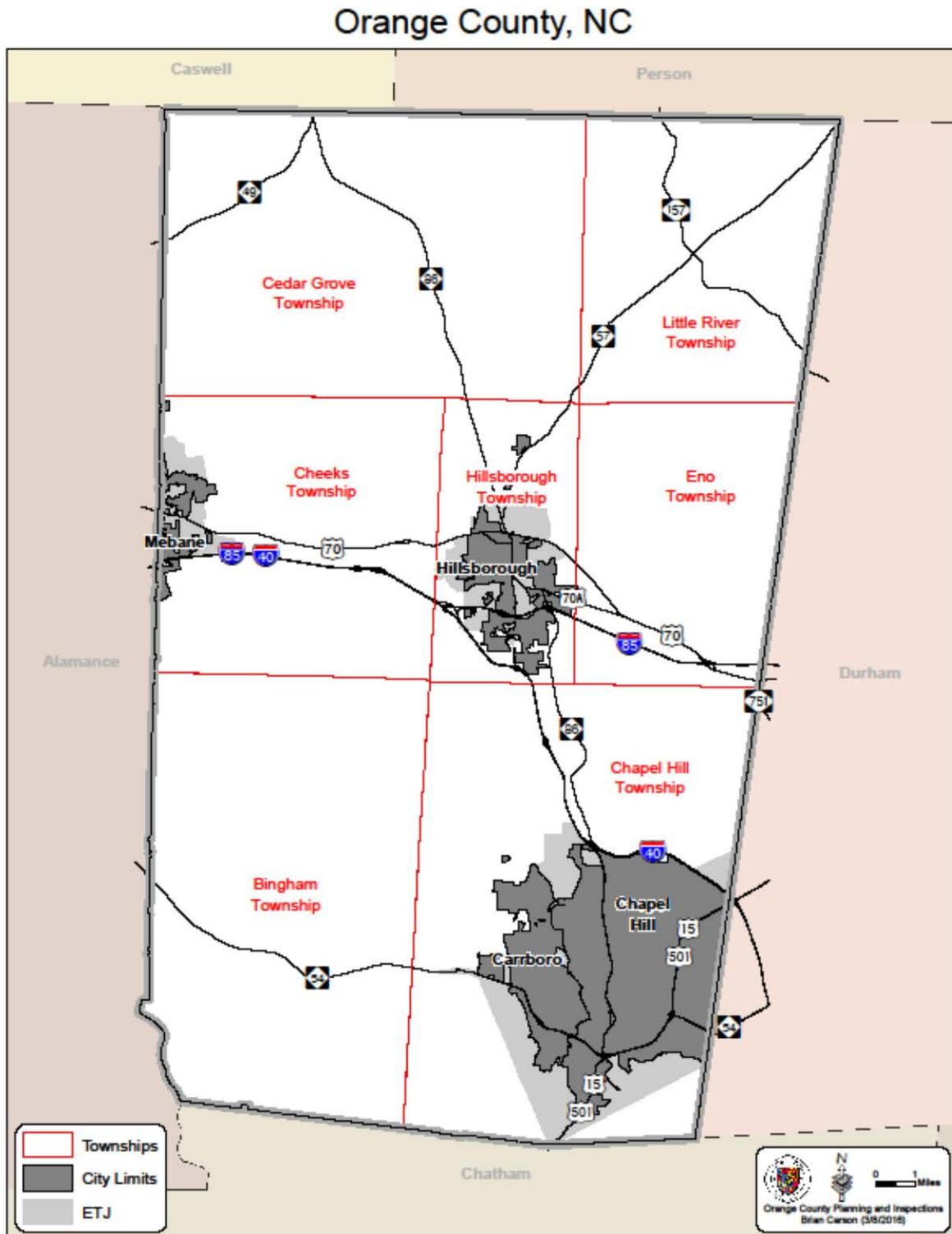
- the U.S. Census, American Community Survey and the HUD Comprehensive Housing Affordability Strategy (CHAS) data and tables and other federal and state programs and local data sources
- A review of the affordable housing objectives and policies of Orange County, Chapel Hill, Carrboro, and Hillsborough
- A review of local real estate and mortgage practices

- **Interviews & Meetings**

- Meetings and/or interviews were conducted with County Staff, representatives from Chapel Hill, Carrboro, and Hillsborough, public housing providers in Orange County and the Town of Chapel Hill, community and social service/advocacy agencies for the disabled, housing providers, the local Board of Realtors, and home builders.

Because this analysis involves four entities, data will be presented in the following order when available: Orange County (or Durham-Chapel Hill, NC MSA where appropriate), the Town of Chapel Hill, the Town of Carrboro, and finally the Town of Hillsborough (see the map on the following page, Municipalities of Orange County, NC). This AHSP provides an broad view of the County and affordable housing needs and related strategies and recommendations recognizing that actions in one area may affect the actions in the other areas requiring on going collaboration and engagement of the community, affordable housing providers and municipal partners.

Municipalities of Orange County, North Carolina



B. COUNTY GOALS AND PRIORITIES:

The Orange County Board of County Commissioners adopted the following five County Goals and Priorities for Fiscal Year 2009 and has reaffirmed them through to 2016. While this AHSP most specifically addresses Goal One, it connects to and supports each of these five goals.

Goal One: Ensure a community network of basic human services and infrastructure that maintains, protects and promotes the well-being of all County residents.

Goal Two: Promote an interactive and transparent system of governance that reflects community values.

Goal Three: Implement planning and economic development policies which create a balanced, dynamic local economy, and which promote diversity, sustainable growth and enhanced revenue while embracing community values.

Goal Four: Invest in quality County facilities, a diverse work force, and technology to achieve a high performing County government.

Goal Five: Create, preserve, and protect a natural environment that includes clean water, clean air, wildlife, important natural lands and sustainable energy for present and future generations.

The Orange County Board of Commissioners (BOCC) met on January 29, 2016 for an annual retreat. In reviewing the five county goals of the BOCC above, affordable housing was a high priority under Goal 1: Ensure a community network of basic human services and infrastructure that maintains, protects, and promotes the well-being of all county residents. The Board further stated that there be a priority for decent, standard housing options for all residents regardless of household income level and that funds be used to develop a targeted number of units (set numerical goal), especially rentals. The AHSP addresses this priority of the Board.

C. AFFORDABLE HOUSING NEEDS:

In developing an Affordable Housing Strategic Plan in Orange County, the demographic and socio-economic characteristics of the County were evaluated as a basis for determining and identifying affordable housing issues in the County. Some of the findings as presented in the tables,

maps, data and analyses of the AHSP are summarized below and include the following:

Income and Poverty

- The median income for Orange County has continued to be well above that for the state and neighboring jurisdictions. In 2011 the median household income for Orange County was \$56,055, compared to \$46,291 for North Carolina.
- Based on a comparison between the 2000 Census and 2007-2011 American Community Survey estimates, Orange County's population increased by 11.5% between 2000 and 2011. The median household income of the area increased almost threefold compared to the population increase, 32.3%. This indicates that a higher percentage of higher income persons moved into the area. *New housing construction (and existing housing developments upgrading) has responded predominately to the higher income market. As a result rents have continued to climb and the number of affordable units to decline shutting lower income households out of the market for affordable decent, safe and sound housing.*
- In comparison, to an increase in median household income, nearly forty percent (39.74%) of all residents in Orange County were considered low- to
- moderate-income at the time of the 2010 U.S. Census. In the Town of Chapel Hill, approximately 37.44% of the residents were considered low- to moderate-income at the time of the 2007-2011 American Community Survey. The Town of Carrboro had a 46.07% low- to moderate-income population percentage, while 46.43% of the Town of Hillsborough was low- to moderate-income.
- *Over fifteen percent 16.9% (20,542 individuals) of the population in Orange County was living below the poverty level in 2011, according to the 2007-2011 American Community Survey. This was up from 14.1% (15,318 individuals) in 1999.*
- As median income has gone up so have the number of residents in poverty and in unstable and or substandard housing; and the number faced with the option of last result--moving out of their community and the county for affordable housing. *Worse still are*

the extremely limited to non-existent options for those residents at risk or already experiencing homelessness.

- The County's poverty statistics for families with children are significant, particularly for single mothers. The chart in the housing market analysis of the AHSP illustrates the poverty statistics for families living in Orange County. At the time of the 2007-2011 American Community Survey, the percentage of some families with children living below the poverty level was as follows:
 - Families with related children under the age of 18 was 14.5%.
 - Female-headed families with related children under the age of 18 was 35.2%.
 - Families with a householder who is White is 6.1%
 - Families with a householder who is Black or African American is 20.6%.
 - Families with a householder who is Asian is 15.4%.
 - Families with a householder who is Hispanic or Latino is 29.4%.
- In 2011, approximately 8.7% of all families in the Town of Chapel Hill lived below the poverty level; of the female householders, 28.3% were below the poverty level and 30.9% of those with children under 18 years were below poverty.
- In the Town of Carrboro, approximately 10.1% of all families were below the poverty level; of the female head of households, 27.7% were below poverty level and 31.3% lived with related children under 18 years.
- *In the Town of Hillsborough, approximately 23.7% of families lived below the poverty level in 2011; of the female householders, 70.3% lived below the poverty level, with 77.0% of those living with children under 18 years living below poverty.*
- *There are 9.9% (5,016) of all individuals on limited incomes from social security, supplemental social security and public assistance.*

Rental and Owner Occupied Housing Stock and Housing Costs

- According to the 2007-2011 American Community Survey, there were 50,837 households in Orange County; compared to the 2000

Census that reported 45,863 households in the County. Of the households in 2011, 60.2% were owners and 39.8% were renters, whereas in 2000, 57.6% were owners and 42.4% were renters; there was a small increase in homeownership over the decade.

- Of the three jurisdictions, Hillsborough has the highest percentage of owner-occupied units at 55% and Chapel Hill is closer to an equal distribution between owner-occupied units at 49.1% and 50.9% respectively. Carrboro has the largest percentage of rental housing stock, 64.5%. Hillsborough in relation to its overall housing stock has the highest percentage of older housing, 25% built before 1960. This is more recently being balanced by new construction; however there is still the need to improve and preserve the existing affordable housing stock.
- According to the 2007-2011 American Community Survey, there are 55,315 housing units in Orange County, of which 50,837 (91.9%) are occupied; this leaves a vacancy rate of 8.1% in the County. *Most of the vacant units are located in the northwestern and southeastern portions of the County, and in the central portion of Chapel Hill and most require some level of rehabilitation. According to the U.S. Census and the American Community Survey data, over 27% (1,209) of all vacant units are not habitable.*
- The median value of owner-occupied homes in Orange County in 2000 was \$179,000, compared to \$108,300 for the State of North Carolina. The median value of owner-occupied homes in Orange County in 2011 was \$270,300 compared to \$152,700 for the State of North Carolina. The values of the housing stock in Orange County continue to be substantially higher than those of the State of North Carolina as a whole and of neighboring jurisdictions. *The increasing cost of acquiring existing properties and land makes land banking a valuable tool in preserving and developing affordable housing for present and future residents.*
- Just over a quarter of all owner-occupied households (28.6%) with a mortgage are paying over 30% of their monthly income on housing, indicating a moderate percentage of owners whose housing is not considered affordable. The median mortgage expense in Orange County for 2000 was \$1,333, compared to \$1,831 in 2011.

- Residents of Hillsborough had the lowest median monthly housing costs among the three jurisdictions for owner-occupied units, paying \$1,383. Carrboro had the highest monthly housing cost for homeowners of the three jurisdictions at \$1,873 per month. Chapel Hill has monthly housing costs of \$1,673 per month.
- *The median monthly rent in Orange County increased by 22.81% between 2000 and 2011, from \$684 to \$840, respectively.* The median monthly housing cost for Chapel Hill in 2011 was \$1,095; the median monthly housing cost for Carrboro was \$885; the median monthly housing cost for Hillsborough was \$964. While rents in the past were relatively more affordable in Hillsborough the trend is much higher increases in rent.
- *The monthly housing costs for 48.2% of all renter-occupied households in Orange County exceeded 30% of monthly income in 2000, indicating an even higher percentage of renters whose housing is not considered affordable. In 2011, that amount increased to 53.8%, which is a 5.6% increase from 2000.*
- According to the 2007-2011 American Community Survey (ACS) data, there were 50,837 households in 2011 in Orange County. Based on this data, 14,494 (28.5%) of all households were single person households living alone.

Cost Burdened

- A central housing problem facing many households in Orange County is a lack of affordable housing and many of the County's lower income households are paying more than 30% (cost burdened) to more than 50% (severely cost burdened) of their total household income on the monthly cost for housing.
- According to the 2007-2011 ACS data, 44.1% of all renter households are cost burdened by 30% or more, and 12.1% of all owner households are cost burdened by 30% or more. In addition, 28.4% of all renter households are cost burdened by 50% or more, and 7.7% of all owner households are cost burdened by 50% or more. *This means in whole numbers that 7,629 households were cost burdened by 30% to 50%, and 8,751 households were cost burdened by greater than 50%.*

- In Chapel Hill, 53.5% of all renter households are cost burdened by 30% or more, and 19.8% of owner-occupied households are cost burdened by 30% or more. Additionally, 35.8% of renter households are cost burdened by 50% or more and only 9.4% of owner-occupied households are cost burdened by 50% or more.
- In Carrboro, 47.9% of all renter households are cost burdened by 30% or more, and 30.7% of owner-occupied households are cost burdened by 30% or more. Additionally, 23.9% of renter households are cost burdened by 50% or more and only 9.3% of owner-occupied households are cost burdened by 50% or more.
- In Hillsborough, 43.4% of all renter households are cost burdened by 30% or more, and 39.0% of owner-occupied households are cost burdened by 30% or more. Additionally, 34.4% of renter households are cost burdened by 50% or more and only 9.8% of owner-occupied households are cost burdened by 50% or more.

Mobile Homes (Manufactured Housing)

- *In 2000, Mobile (manufactured) homes made up 10.4% of the housing stock; a source of affordable housing in the county. By 2011, mobile (manufactured) homes had decreased and make up 7.9% of the housing stock.* There was also a slight decline in multi-family units of twenty or more units (down from 9.1% to 7.1%).
- Mobile home parks in Orange County are geographically located throughout the entire County but most are clustered along the major state and federal highway corridors. *Approximately sixty-five (65) of the mobile home parks (65%) are located within 3,000 feet of a major roadway: Route 54; Route 86; Route 70; Route 70A; Route 40; Route 85; and I-85/40. The majority of the remaining thirty-four (34) are located within one (1) mile of these major roadways.* Fifty-four (54) of the mobile homes are located in the southern half of the county which includes the portions of the County south of Hillsborough. There are only three (3) mobile home parks located in the northernmost quarter of the county.
- In January 2016, the condition of each of the 2,017 mobile homes in the 100 mobile home parks of the County was analyzed as to the

scope of rehabilitation work needed to make the mobile home safe, sound, and secure, and to bring it up to minimum code standards. It was determined that:

- 378 (18.74%) mobile homes are in sound condition
 - 990 (49.08%) mobile homes are in need of minor repairs
 - 580 (28.76%) mobile homes are in need of major repairs
 - 69 (3.42%) mobile homes are economically infeasible to repair
 - A total of 55 mobile home parks had vacant spaces (250 vacant spaces). Of those parks with vacancies, the average number of vacancies is 4.6 spaces with the largest number of vacancies at one park of 28 spaces available with room to expand.
- According to the 2010-2014 American Community Survey, there are an estimated 4,089 mobile homes in Orange County, 7.3% of the total housing units. This indicates that roughly half of all mobile homes are located outside of mobile home parks.
 - The average sales price for manufactured housing also has continued to steadily increase with the smallest unit costing approximately \$39, 500 in 2010 to \$45,000 in 2014 for 1,115 sq. ft. unit and larger units ranging from \$65,300 (\$45.41/sq. ft.) to \$82,000 for a 1710 sq. ft. unit (\$47.95/sq. ft.). ***The cost and or lack of financing along with the cost of insurance makes even this purchase difficult for low income households and has caused this to become more of a rental option for land owners and residents of the mobile home parks.*** A comparison of other manufactured housing with stick built was also examined in the AHSP. The AHSP recommends that the county continue to pursue ways to work with landowners and owners of individual units to preserve and expand this stock of housing where feasible and environmentally suitable.

Persons with Disabilities

The 2007-2011 ACS data showed the number of disabled individuals in Orange County to be approximately 11,180 or 8.4% of the total population over the age of 5 (126,228). This is an indicator of the need for housing for the disabled which are mainly low- and moderate-income, and do not have housing resources that are accessible and/or affordable.

- Of persons with disabilities between ages five and seventeen (1,079), most have cognitive difficulties, followed by individuals that have self-care difficulties.
- Of persons with disabilities between ages eighteen to sixty-four (6,326), the disabilities for high numbers of persons span the range of difficulties including difficulty with independent living.
- ***Of the population age 65 and older (12,749), 29.6% (3,775) have a disability that also span a range of difficulties including hearing, cognitive, ambulatory and vision among other difficulties.***

Housing Needs of Seniors

- More affordable housing options for seniors are also greatly needed. In sum, to serve a county with 22,123 residents over 60 years of age Orange County has approximately 1,534 designated senior-specific housing units across the continuum of care. ***Further, it is most often the case that for each type of current housing option for seniors, there are few to no vacancies (waiting lists from one to several years) despite costs that would be out of reach for many seniors.***
- Single person households aged 65 and over comprised 3,277 households, or 6.4% of all single person households. It is expected that as these seniors continue to age in place, additional accommodations and special needs housing will be necessary for this portion of the County's population. The County will need to assist in obtaining and providing funding and work with housing service and senior support agencies to provide more programs, activities, and accommodations for this growing population of the county.

Homeless

- ***Specific needs of the extremely low-income that are housed, but are at imminent risk of becoming unsheltered or living in shelters are: food, clothing, transportation and job training with housing.***
- Another housing issue is the lack of continuous and coherent housing supportive services.

Live and Work Pattern

The following data highlights patterns in residency and employment in the County (data was not available for Hillsborough): the population that live and work in the jurisdiction is 20.11% (19,698) in Orange County; 10.56% (6,435) in Chapel Hill and 4.75% (540) Carrboro.

Other Housing Problems

- A household is considered to have a housing problem if it is cost burdened by more than 30% of their income, experiencing overcrowding, or having incomplete kitchen or plumbing facilities. The four severe housing problems are lacks complete kitchen facilities; lacks complete plumbing facilities; more than 1.5 persons per room; and cost burdened over 50%.
- According to the 2006-2010 Comprehensive Housing Affordability Strategy (CHAS) data (the most current complete set of the data): *Throughout Orange County, the number of renter households experiencing one of the four housing problems is greater than the number of owner-occupied households experiencing a housing problem.* This trend is much more pronounced in the Town of Chapel Hill where renter households are almost three times more likely to experience a housing problem than owner-occupied households.
- The 2006-2010 HUD CHAS data for Orange County reveals that, 43.4% of renter households and 32.5% of owner-occupied households experienced one of the four housing problems (incomplete kitchen facilities, incomplete plumbing facilities, more than 1 person per room, and cost burdened by 30% or more).
- *According to CHAS data (2007 – 2011) over 5,000 households at 0%-30% median income have one of more of the four housing problems; however, the overwhelming problem was housing cost burden greater than 50% of income (4,245).*

- 47% of all disabled renters have a housing problem that includes cost burdened by 30% or more or another type of housing problem. 32% of disabled homeowners have a housing problem that includes cost burdened by 30% or more or another type of housing problem.
- In Carrboro 51.1% of renter households and 30.7% of owner occupied households experienced a housing problem.
- In Chapel Hill 54.9% of renter households and 20.5% of owner-occupied households experienced a housing problem.
- In Hillsborough 47.3% of renter households and 39.0% of owner-occupied households experienced a housing problem.
- According to the 2007-2011 American Community Survey (the most current complete set of census estimates): When comparing homeowners and renters by race, “White” households represent the largest percentage of homeownership (84.1%) with “Black or African American” households comprising (9.4%) of the total homeowners.
- In examining housing needs and patterns to help determine goals and strategies, analysis included the extent to which any racial/ethnic group has a greater need in comparison to the County’s overall population need. Data detailing information by racial group and Hispanic origin has been compiled from the CHAS data and the 2010 U.S. Census. Disproportionate need is defined as a group having at least 10 percentage points higher than the percentage of persons in that group as a whole. The following are some of findings of disproportionate needs in Orange County. Some of the findings with regards to homeownership, access to credit and financing among others was:
 - The number of White, non-Hispanic middle-income applicants significantly outnumbers the number of minority applicants, and minority households have a lower origination rate and almost double the denial rate.
 - Of the total number of “White” households, 65.52% are homeowners and 34.48% are renters. In comparison, of all “Black and African American” households, 42.85% are homeowners and 57.15% are renters.

- According to the Home Mortgage Disclosure Act (HMDA) data: The percentage of total applications by Whites accounts for almost three-quarters (74.3%) of the total number of applications, regardless of income.
- Loan origination rates are higher for White applicants than for minority applicants as a whole, and minority denial rates are higher than White denial rates.

In summary, the extremely and very low-income residents of the county (0 to 30% to 50% of median income) including seniors, the homeless and persons at-risk of homelessness and persons with disabilities are the most adversely affected by the high cost of housing and the great lack of affordable housing in Orange County. The lack of affordable housing that is decent, safe, and sound forces these residents of the county into substandard housing and a life of instability that also affects education, health and employment outcomes for families and individuals and the community.

In providing a continuum of affordable housing, the county's goals should include other special needs housing such as a place for persons who are victims of domestic violence and having a shelter(s) that can appropriately serve a mix of families and individuals. Goals should include strengthening planning and coordination of resources for emergency situations where families and individuals become homeless due to life events, acts of nature or involuntary displacement to help them return to or obtain as quickly and effectively as possible stable housing and independence. The following section (Section D.) provides the proposed Orange County Strategic Plan Goals and Strategies: 2016 – 2020 and respective actions and recommendations.

NOTE: AFFORDABLE HOUSING PRIMER

For your information and convenience, at the following links is the website for an ***Affordable Housing Primer*** that is a helpful basic reference and educational tool produced by the North Carolina Housing Coalition on affordable housing including affordable housing terms and programs:

<http://www.nchousing.org/research-data/affordable-housing-primer/2009-affordable-housing-primer/Affordable Housing Primer 2009 final.pdf>

<http://www.nchousing.org/research-data/affordable-housing-primer> (by Table of Contents)

D. STRATEGIC PLAN GOALS AND STRATEGIES: 2016 - 2020

Affordable Housing is the foundation for achieving self-sufficiency and promotes stronger, more inclusive communities.

The AHSP is intended to be a “living” affordable housing plan that provides a framework for moving forward in addressing the affordable housing needs of current and future County residents. The successful implementation of the AHSP is based in the expectation and more importantly in the commitment to work together collaboratively with the County’s municipal, state and federal and other public and private community partners, Advisory Boards, Authorities and Commissions and the community at large to meet the affordable housing needs of the County. There will be many additional opportunities for public and private entities and the community to have further input into the AHSP and implementation of the goals, strategies and actions and recommendations.

The ASHP builds upon the analyses, data, community-wide input, findings and strategies in the Orange County Consolidated Plan and the Analysis of Impediments to fair housing choice prepared for the Orange County HOME Consortium that is comprised of Orange County and the Town of Carrboro, Town of Chapel Hill and Town of Hillsborough. The AHSP identifies the critical need for affordable housing for individuals and households of extremely and very low income and for population groups with special needs including the homeless, persons with physical and or mental disabilities and the elderly.

The AHSP reviews existing affordable housing programs and tools of the County and assessments of the county’s housing stock. This included examining mobile home parks of the County which provides a significant source of affordable housing, publicly owned land and other development opportunities and challenges for preserving and increasing the supply of affordable housing. The development opportunities and challenges were examined with consideration given to the County’s existing and planned infrastructure and access to transportation, employment, services and other community assets.

The AHSP identifies goals for the next five years, and proposes strategies and opportunities through a list of proposed actions and recommendations to meet those goals. This includes the proposed county-wide shared goal of 1,000 affordable housing units provided through acquisition, construction, urgent repair, assisted housing, and rehabilitation of the existing housing stock, over the next five (5) years.

In order to begin to meet the need for affordable housing in Orange County, particularly residents who are most cost burdened at 30% to 50 % median income as discussed in the AHSP, the ASHP has a proposed overarching shared countywide goal of 1,000 affordable housing units. The shared countywide goal of 1,000 units are to be provided through acquisition, construction, urgent repair, assisted housing, and rehabilitation of the existing housing stock, over the next five (5) years. At least

500 of those units is recommended to be new assisted rental units through the proposed five million dollar Bond for affordable housing in addition to other county and public and private resources.

The AHSP proposes that of the 1000 units goal 25 – 30% of the units be rental units serving extremely low and very low income households, at or below 30% – 50 % of median income (using the federal definition) and another 25 - 30% serving special needs populations including the homeless, persons with physical and or mental disabilities and seniors. The highest priority is recommended for these populations and then for individuals and households that are at or below 50 - 80% of median income for the County.

The AHSP has identified ten goals with strategies provided for each goal and action and recommendations to implement them. The thirty-three Actions (A)/Recommendations(R) are listed with each goal and set of strategies. Those numbered with both A and R (AR) are Actions/Recommendations county staff is requesting to pursue immediately and or require funding decisions. With the Board’s approval of the AHSP, the Director of the Department of Housing and Community Development in consultation and collaboration with other county staff and approval of the County Manager will bring back to the BOCC detailed work plans and metrics in collaboration with the community, municipal partners, Advisory Boards and County agencies as appropriate.

The format of the following table presents the ten goals, by each goal and the respective plan strategies and actions (A)/recommendations (R). The actions (A)/recommendations (R) are listed and grouped with the respective goal and related strategies and are also numbered consecutively across all goals providing thirty-three actions/recommendations in all. Those numbered with both A and R (AR) are actions/recommendations county staff is requesting to pursue immediately and or require more funding decisions.

Orange County Affordable Housing Strategic Plan

Goals: 2016 - 2020

Affordable housing is the foundation for achieving self-sufficiency and stronger more inclusive communities.

**2016 – 2020 Five Year Countywide Shared Goal:
1,000 Affordable Housing Units***

*New Acquisitions, Construction, Urgent Repairs, Newly Assisted and or Rehabilitated

GOAL 1: Provide a continuum of decent, sound and safe affordable housing with a diversity of housing types, densities and choice throughout the County that promotes inclusive communities and full access to its assets for current and future populations.

Strategies	Action/Recommendation
<p>1.1: Identify publically owned land or property located within the County that may be used to address affordable housing needs identified in the Plan.</p> <p>1.2: Identify and pursue local, state, federal and private resources including partnering with university communities to leverage available resources (that include publicly owned land and surplus facilities and financial support) for development of permanent affordable housing at a level that is “key” to meeting the basic need of decent safe and sound affordable housing for a broad cross section (age and income) of the residents of Orange County.</p> <p>1.3: Promote an innovative approach to multi-family and special needs housing that is responsive to the needs of Orange County, makes effective use of technology, addresses financial and environmental sustainability, and provides quality developments with balanced focus on reducing construction and maintenance costs.</p> <p>1.4: Locate affordable housing units/developments in areas that are proximate to needed services, shopping, schools, transportation options, and employment centers.</p> <p>1.5: Support the development of permanent affordable workforce housing options including creative and non-traditional options in design (amenities, size, number of units and cost) for young adults and other single individuals starting careers and families with members in modest paying professional careers (such as teachers, service workers and medical assistants).</p>	<p>AR1: Provide county or other publicly owned property through a RFP for the immediate development of single family attached, detached, and multi-family housing units. Based on the SWOT analysis of publicly owned land, the County owned, small-parcel property (3 acres or less) will be provided for the development of small scale, single family detached and attached (duplex, triplex) units for sale or rent to qualified buyers and/or occupants through partner affordable housing non-profits.</p> <p>AR2: Implement a competitive process for evaluating proposals for development and maintenance of affordable housing inventory. The proposals will be evaluated by the Orange County Housing Authority and and/or the Affordable Housing Advisory Board as appropriate. These bodies will make recommendations to the BOCC on the distribution of any county funds.</p>

1.6: Support a range of affordable housing initiatives in partnership with non-profit organizations and outreach to the broader community to leverage state and federal funds to provide a range of housing opportunities for County residents.

1.7: Preserve and monitor the affordable housing stock that exists by developing strategies, tools and partnerships that allow the County to retain the supply of decent, safe, sound, and accessible housing that is affordable to low- and moderate-income owners and renters including manufactured homes.

1.8: Plan for possible displaced homeowners and renters of manufactured housing that may have difficulty finding other sources of affordable housing due to rising land costs and rent, expected particularly in Chapel Hill and Carrboro.

1.9: Coordinate the location of higher intensity / high density residential and non-residential development with existing or planned locations of public transportation, commercial and community services, and adequate supporting infrastructure (i.e., water and sewer, high-speed internet access, streets, and sidewalks), while avoiding areas with protected natural and cultural resources. This could be achieved by increasing allowable densities and creating new mixed-use zoning districts where adequate public services are available.

1.10: Improve the public infrastructure through rehabilitation, reconstruction, and new construction that will facilitate affordable housing and economic development.

1.11: Evaluate the feasibility of incentives and utilize them to stimulate the development/ production of needed affordable low income housing and increase participation and or private investment by lenders, landlords, apartments, developers and faith-based organizations.

AR3: The County should negotiate an agreement with the Orange County Housing Authority to manage and maintain affordable housing inventory owned by the County.

AR4: Through a Design Competition create and implement an innovative development plan and designs for the larger county-owned parcel(s) including the Southern Human Services Center site that will include a mix of affordable housing uses including workforce housing and or special needs housing and services as suited to the site and identified priority needs.

A5: Assess land use planning efforts to identify and provide greater opportunities for the joint location of affordable housing and employment centers near existing or near term construction of public utilities and transportation which reduces commuting times, traffic congestion on roadways, air emissions, and generally improve quality of life for families and individuals.

A6: Assess land use planning efforts in consultation with the developer community (for profit/nonprofit) to identify potential barriers to development and to identify effective incentives for Orange County to increase affordable housing options including exploring the success of other communities and evaluating Chapel Hill's efforts to encourage developers to build affordable units as part of new developments.

A7: Utilize planning and development opportunities, related to northern and western Orange County that include the NC 57/Speedway Small Area Plan, the Efland-Mebane Small Area Plan, Economic Development Zoning Districts, and the Efland Sewer Project, as well as regulations and practices contained in the Orange County Unified Development Ordinance and the Comprehensive Land Use Plan.

	<p>AR8: With the completion of a conditions survey and SWOT analysis of mobile home parks in the County, immediately pursue opportunities to preserve the inventory, expand and or improve this source of affordable housing through acquisition, land banking and partnership opportunities. This may include and is not limited to minor to moderate repairs and or conversion of underutilized parks to modular housing, cottages, and or small (micro/tiny) homes.</p> <p>A9: Encourage blending of development that can be supported by on-site/individual wastewater and utility systems (i.e. individual septic and wells) to afford use of underutilized mobile parks and small sites where feasible.</p> <p>A10: Examine increasing allowable densities and creating new mixed-use zoning districts where adequate public services are available.</p> <p>ART 1: Develop in collaboration with community service providers:</p> <ol style="list-style-type: none">1) a community plan to respond to housing emergencies due to acts of nature, life events, etc.;2) a coordinated community-wide service model for intake of homeless individuals and families seeking assistance; and a displacement plan for larger housing displacement events due to new development and or sale of property affecting households of low income and no immediate alternative housing options and to minimize housing instability, loss of personal property and an adverse impact on families and individuals and particularly on vulnerable populations.
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GOAL 2: Increase the quantity and quality of affordable housing, and help low-income families acquire needed information, knowledge, and skills to improve their employment opportunities and reduce the number of families falling below the poverty level.

Strategies	Action/Recommendation
<p>2.1: Continue and strengthen collaboration between Agencies (public/private) and with municipalities in and neighboring to the County to support existing and new initiatives to meet affordable housing and related service needs and to promote maximum empowerment and self-sufficiency of all income groups and households.</p> <p>2.2: Promote the development of affordable, decent, safe and sound rental housing that avoids the creation of areas of low-income concentration.</p> <p>2.3: Implement the County’s Analysis of Impediments, the Consolidated Plan and the Housing Authority Plans.</p> <p>2.4: Improve the parks, recreational centers, trails, libraries, and all public and community facilities in the County to provide access to these resources by all residents of the County.</p> <p>2.6: Increase public safety, community policing, municipal services, and public service programs in distressed/problem areas of the County.</p> <p>2.7: Remove and eliminate blighting conditions through demolition of vacant, abandoned and dilapidated structures infeasible for rehabilitation and provide replacement housing where determined feasible and or consider for land banking.</p> <p>2.8: Promote neighborhood revitalization in strategic areas to improve communities of low wealth and substandard conditions through acquisition, demolition, rehabilitation, code enforcement, infrastructure, infrastructure improvements, housing construction, public and community facilities improvements, and educational and employment developmental opportunities.</p>	<p>ART 2: 1) Continue to strengthen the intra- and inter- agency collaboration and community engagement for addressing specific needs and shared and or related goals that include affordable housing. Some of these include the Family Success Alliance staffed by the Health Department; Master Aging Plan, initiatives for the Partnership to End Homelessness, working with OWASA to reduce water consumption and increase cost savings for tenants and homeowners, transportation, and land use.</p> <p>2) In consultation with our community partners, fully utilize our community human capital assets, areas of expertise and unique capacities and special powers to facilitate carrying out the goals and strategies and of the <i>Orange County Affordable Housing Strategic Plan: 2016 -2020</i>. This may include requesting our community partners, particularly in areas of expertise, to participate in developing guiding principles, general guidelines and or design criteria/considerations for the different types of housing needed and planned over the five year period of the Plan. This will include engaging our Advisory Boards, Authorities and Commissions and other public and private partners in their areas of expertise such as the Orange County Housing Authority under AR3 above to, our Municipal Partners and the collective leadership of the Board of Orange County Commissioners (BOCC).</p>

A13: 1) Assist low- and moderate-income households including Section 8 Housing Choice Voucher Program households through the Housing Authority in becoming homeowners by providing down payment assistance, closing cost assistance, and pre and post housing counseling training. 2) Develop a similar model for successful obtainment, maintenance and retention of rental housing and providers of rental housing particularly for the Housing Choice Voucher Program.

A14: Provide a Family Self-Sufficiency Program for Section 8 Housing Choice Voucher participants.

A15: Accommodate the development of group homes, foster care facilities, transitional housing facilities and other housing types in appropriate locations to provide increased opportunities for social interaction, a de-institutionalized lifestyle, and gainful employment.

GOAL 3: Provide permanent and temporary housing and community and supportive services for populations with special needs that include the homeless, older residents, disabled, mentally ill, and persons with acquired immune deficiency syndrome.	
Strategies	Action/Recommendation
<p>3.1: Support the coordinated strategies undertaken by the Partnership to End Homelessness for housing and support services for homeless persons, and persons who are at risk of becoming homeless.</p> <p>3.2: Increase the number of accessible permanent housing units through new construction and through rehabilitation of existing housing units and through financial or development incentives on available vacant and developable land in the County.</p> <p>3.3: Continue to enforce the ADA and Fair Housing requirements for landlords to permit reasonable accommodations to their rental properties so they become accessible to tenants who are disabled.</p> <p>3.4: Support the local Continuum of Care’s (Coca) efforts to provide emergency shelter, increase support for rapid rehousing, and permanent supportive housing for persons and families who are homeless or who are at risk of becoming homeless.</p>	<p>AR16: Assist and participate in collaborative efforts in partnership with the local Continuum of Care and the affordable housing community and partners to address the following unmet community needs:</p> <ol style="list-style-type: none"> 1) an adequate emergency shelter (s) that can accommodate individuals and families of mixed composition and sex and for men; 2) a Domestic Violence shelter according to best practices and expertise in meeting the needs of victims; 3) more permanent supportive housing for disabled homeless people including creative and non-traditional affordable housing options that reduce cost and provide for more affordable units; and service needs of unaccompanied minors/youth. <p>A17: Make full use of performance data from the HMIS to help drive program decision-making and to monitor, evaluate, and report program and system-wide performance and gaps of the housing and service delivery system for the homeless.</p> <p>A18: Continue to work collaboratively and review other success models and evidence based approaches and or programs to address the following challenges:</p> <ol style="list-style-type: none"> 1) Identifying landlords willing to rent to formerly homeless people, with either short-term rental assistance or assistance via a rapid rehousing program or long-term rental assistance via permanent supportive housing tenant-based voucher programs; 2) Bringing rapid rehousing approaches to scale and providing adequate funding for rapid rehousing initiatives; and

	<p>3) Engaging homeless people in developing a permanent “housing plan” and in working to improve their own self-sufficiency, using</p>
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Goal 4: Provide an adequate supply of affordable and suitable housing options for older residents to age in place, for those over housed and or priced out due to market forces, maintenance and other uncontrollable costs and promote and develop a range of affordable housing design choices and locations that allow them to remain in their community of choice in Orange County.

Strategies	Action/Recommendation
<p>4.1 Expand assistance in the retrofitting, repair, and maintenance of existing homes owned by financially challenged households, particularly those that are senior residents.</p> <p>4.2: Provide financial and educational assistance to qualified homebuyers; providing education and advocacy regarding tenants’ rights; and providing financial assistance to homeowners wanting to install indoor plumbing and/or connect their properties to public water and sewer facilities.</p> <p>4.3 Increase the supply of affordable, decent, safe, sound and accessible housing for senior residents, persons with disabilities, and persons with other special needs through rehabilitation of existing buildings and new construction.</p> <p>4.4 Improve the accessibility of owner occupied housing through rehabilitation and improve renter occupied housing by making reasonable accommodations for the physically disabled and or develop programs to promote improvement of substandard renter properties.</p> <p>4.5 Support social service programs and facilities for the elderly, persons with disabilities, and persons with other special needs.</p>	<p>AR19. Expand the County’s Urgent Repair Program to serve 50 to 60 senior residents and or persons with disabilities, thereby substantially reducing or practically eliminating a long waiting list to serve this population for urgent housing repair needs. This would require an additional \$150,000 to \$200,000 to the current fiscal year funding level of \$75,000 allocated to complete approximately 25 owner-occupied housing units of senior households and or households with persons with a disability.</p> <p>A20. Implement a priority that of a total number of assisted units of a project or program, a certain percentage should serve extremely low (30% AMI) and very low income (50%AMI) elderly persons and persons with a disability.</p>

GOAL 5: Preserve the current supply of rental housing stock that is aging and in need of rehabilitation and upgrading to maintain the existing supply of affordable units into the future and to prevent the loss of more affordable housing.	
Strategies	Action/Recommendation
<p>5.1: Continue to provide financial assistance to low- and moderate income homeowners to rehabilitate their existing owner-occupied housing.</p> <p>5.2: Continue to require that all new housing built or located in Orange County continues to meet the minimum standards specified in the State of North Carolina Building Code, the Orange County Unified Development Ordinance, the US Department of Housing and Urban Development and the USDA Rural Development Agency when appropriate.</p> <p>5.3: Enforce state and local codes and ordinances to bring buildings into compliance with the standards through systematic enforcement.</p> <p>5.4: Conduct Lead Based Paint (LBP) inspections and assessments as necessary for full compliance with all applicable LBP regulations and to control or reduce, to the extent feasible, all LBP hazards in all older housing of the County.</p>	<p>AR21: Leverage maximum funding through the North Carolina Housing Finance Agency Single-Family Rehabilitation Loan Pool (SFRLP) funds. Each recipient of SFRLP funds is now eligible with recent program changes for up to \$500,000 (instead of \$170K) to conduct financially-feasible, moderate housing rehabilitation for households that are below 80% AMI. Due to the extent of rehabilitation required for typical older homes of Orange County applicants, few homes can be completed based on the state requirement of only \$45K to bring each home up to code. Additional funds of \$200,000 - \$250,000 will allow the County to complete approximately 10 homes instead of three (3) homes and fully and more effectively leverage the state funding.</p> <p>A22: Review the County’s Minimum Housing Standards Ordinance in coordination with the Affordable Housing Advisory Board to provide recommendations to the BOCC on making it an effective tool as intended in fostering compliance with the Ordinance and preserving the County’s housing stock of decent safe and sound housing.</p>

<p>Goal 6: Affirmatively further fair housing, promote fair housing choice and improve community wide knowledge and awareness of the Fair Housing Act, related laws, regulations, and requirements throughout the County.</p>	
<p>Strategies</p>	<p>Action/Recommendation</p>
<p>6.1: Improve the public’s, landlords’, realtors’, bankers’ and other lenders’, and local officials’ knowledge and awareness of the Fair Housing Act, related laws, regulations, and requirements to affirmatively further fair housing in the community.</p> <p>6.2: Strive for better intergovernmental cooperation between Federal and State partners, County, local officials, as well as community groups, to effectively identify and address potential barriers to affordable housing choice in the Orange County Consortium Area.</p> <p>6.4: Educate and promote that all residents have a right to live outside impacted areas.</p> <p>6.5: Require all public, private, and non-profit housing developers to abide by provisions of the Fair Housing Act in the development of housing in Orange County.</p> <p>6.6: The County Planning Department should monitor, review and revise within the limits of state statutes the local zoning ordinances as applicable to assure compliance with the Fair Housing Act.</p>	<p>A23: Continue to strengthen educational and outreach programs so all persons will become aware of their rights under the Fair Housing Act and the County’s Human Relations Ordinance and raise community awareness and implementation to address the full meaning of affirmatively further fair housing choice, especially for low-income residents, minorities and the disabled population.</p>

<p>GOAL 7: Provide increased access to job opportunities and skill development for low income residents which will increase household income, and help promote fair housing choice.</p>	
<p>Strategies</p>	<p>Action/Recommendation</p>
<p>7.1: Strengthen partnerships and program delivery that provides increased employment, self-sufficiency, education, job training, and technical assistance and economic empowerment of low and moderate income residents in the County.</p> <p>7.2: Enhance the County’s businesses and industries, expand its tax base, and create a more sustainable economy for residents and businesses.</p> <p>7.2: Support and enhance workforce development and skills training that result in a “livable” wage and increases job opportunities, especially for low and moderate-income individuals.</p> <p>7.3: Support programming that enhances entrepreneurship and small business development, expansion, and retention within low- and moderate income areas and minority neighborhoods.</p> <p>7.4: Promote and encourage economic development to increase employment opportunities.</p> <p>7.5: Increase access to areas of education and employment through housing choice and viable transportation options.</p>	<p>AR24: Study, plan, and develop additional bus routes to provide more public transportation to business “nodes” for low-income workers and to have better access to jobs, services, community amenities and work force development opportunities</p>

GOAL 8: Continue to provide staffing at a high level and quality of service for the County with a commitment to excellence to meet the need for 1) planning, administering, managing, leveraging and providing oversight of federal, state, private and local funded programs and projects and 2) increasing cooperation and collaboration among public, private and municipal partners and communities in addressing affordable housing preservation and development needs of the region that ultimately affect the quality of life for all residents.

Strategies	Action/Recommendation
<p>8.1: Provide program management and oversight for the successful administration and leveraging of federal, state, private and local funded programs and projects; for support of collaborative initiatives, community engagement; for support of various Advisory Boards and Authorities and for research and planning services, special studies and meeting various environmental, fair housing, and other compliance requirements with all federal, state, and local laws and regulations.</p>	<p>AR25: Provide leadership and or support to staff and the community as needed to implement the strategies and recommendations of this Strategic Plan and related County Plans and activities with the guidance and approval of the County Manager and BOCC as needed and required and with broad community involvement including the County’s many stakeholders.</p> <p>AR26: 1) Continue to strengthen internal management of funded programs and projects including policies and procedures, best practices, learning, training and information sharing, reporting and intra and interagency practices and coordination by the Department. This includes listening to, seeking to understand, continuous engagement and responsiveness to our many customers and or partners.</p> <p>2) Strive to ensure maximum leveraging of resources, funding and programs to meet the current and future affordable housing needs of County residents.</p> <p>AR27: Monitor, track and report activities and results of this Strategic Plan to the BOCC by the Department of Housing, Human Rights and Community Development in cooperation and collaboration with other County Agencies, municipal partners and the community.</p>

GOAL 9: Continue to pursue available resources (financial and non-financial) and assess and implement a County dedicated funding source(s) needed to provide the financial resources necessary to address the widening gap in affordable housing needs and available housing to meet that need in the County recognizing that lack of a reliable and on-going source of funding:

- 1) adversely impacts an increasing amount of residents that are low and modest income, seniors, with a disability and the most vulnerable;
- 2) seriously constrains and minimizes community efforts to meet that need;
- 3) Orange County values inclusive, caring, strong communities with opportunities for all residents to become self-sufficient and that affordable housing provides a fundamental foundation; and
- 4) available land and existing units loss are opportunities that may not be regained.

Strategies	Action/Recommendation
<p>9.1: Encourage support for the planned County Bond Issue for schools and affordable housing and continue to increase community understanding of the need and benefit to the entire County; that the proposed Bond will not only meet critical education capital and affordable housing needs of the County, but will also:</p> <ol style="list-style-type: none"> 1) provide an increase in jobs, 2) reduce blight and unsafe housing conditions and strengthen and improve communities; 3) contribute to the local economy by attracting and retaining a talented, diverse and skilled workforce needed by employers; and finally, 4) add to the quality of life by reducing the number of residents who must commute or leave the County to have affordable housing. <p>9.2: Continue to support and provide an increased source of funding beyond federal HOME funding (that still provides an important resource but has been significantly and increasingly reduced over the past several years) to the extent practicable for on-going affordable housing programs and projects by the County’s local non-profit housing providers and continue to ensure priority needs are being met as well as encouraging maximum leveraging and sustainability.</p> <p>9.3: Continue to provide and maintain a set aside of funding for land banking and acquisition opportunities for current and future affordable housing development.</p>	<p>AR28: The County Manager will assess and recommend to the BOCC a dedicated funding source(s) needed and a plan of implementation to provide a source of reliable funds for affordable housing starting with FY2016-17.</p> <p>AR29: Provide and maintain a set aside of funding for land banking and acquisition opportunities and keep this fund opportunity driven.</p> <p>AR30: Seek and support opportunities to partner with community and municipal partners on: 1) major projects and or funding applications to federal, state and private funders and 2) building a stronger and more productive relationship with local and regional financial institutions.</p> <p>AR31: Seek and support opportunities to partner with community and municipal partners in carrying out the strategies and actions of this Plan.</p>

GOAL10: Encourage and support intergovernmental coordination, cooperation and collaboration in the provision of affordable housing in Orange County recognizing the greatest success, efficiencies and benefit County and region wide to all our current and future residents will be achieved through multi-jurisdictional efforts now and into the future.

Strategies	Action/Recommendation
<p>10.1: Continue to expand collaboration among staff, communities, educational institutions and elected officials of municipalities in the region to meet the critical human and region wide need of affordable housing and to support where feasible the goals and strategies of this Strategic Plan.</p> <p>10.2: Continue to build on the relationships between the County and Towns and neighboring jurisdictions as applicable to ensure that future housing meets the broad range of needs of our communities and that these needs are met in the most efficient, effective, and equitable manner, and that new affordable housing developments and improvements enhance the County's and each municipalities' unique quality of life and community character.</p> <p>10.3: Work collaboratively with municipal partners, the university community, the nonprofit community and the private sector to develop effective outreach and community building strategies that increase public, private and for-profit investment and support for affordable housing in the region.</p>	<p>AR32: Continue and strengthen the County's and Towns' joint assessment and planning to obtain federal and other funding and public and private resources sources to provide assistance as needed to households earning lower incomes and or to residents with special needs and to our extremely vulnerable residents.</p> <p>AR33: Continue collaboration and information exchange and to seek opportunities for joint efforts between the jurisdictions in addressing community needs and in maximizing utilization of resources and community benefit. This includes where feasible funding, planning, training, problem solving, civic engagement and identifying and building other community partnerships as needed to meet affordable housing and related community wide needs.</p>

**ORANGE COUNTY
BOARD OF COMMISSIONERS**

ACTION AGENDA ITEM ABSTRACT

Meeting Date: May 10, 2016

**Action Agenda
Item No. 2**

SUBJECT: Presentation on Orange County Employment and Labor Statistics

DEPARTMENT: Economic Development

ATTACHMENT(S):

PowerPoint Presentation on Orange
County Employment and Labor
Statistics

INFORMATION CONTACT:

Steve Brantley, (919) 245-2326,
Director, Economic Development
Department

Amanda Garner, (919) 245-2330,
Economic Developer, New
Recruitment, Economic
Development Department

PURPOSE: To receive a brief summary of Orange County's current employment and labor statistics, statewide demographic comparisons & trends.

BACKGROUND: The attached PowerPoint presentation covers the most current information available regarding Orange County's labor market environment, to include the following topics:

- Demographic summary of Orange County's population & workforce
- Educational & work achievement levels of Orange County residents, compared to advertised job listings for minimum required education and work experience
- Unemployment Rates & Trends in Orange County & the State of North Carolina
- Main employment sectors in Orange County, by business type
- Largest employers in Orange County
- Wage statistics & annual income
- Work area profile analysis
- In & out migration of commuting residents to their place of employment
- Commuting times

Information sources for these comparison charts include:

- U. S. Census Bureau 2009-2014 (Five Year Estimates)
- National Association of Counties (NACo)
- North Carolina Department of Commerce
 - "NC Works" employment & workforce agency (former Employment Security Commission/ESC)
 - "Division of Labor & Economic Analysis Division" (LEAD) – Quarterly Census of Employment & Wages (QCEW - 3rd Q 2015)
 - "ACCESSNC"

Orange County's workforce and employment is primarily influenced by the significance presence of the many University of North Carolina and UNC Health Care facilities based here, the geographic proximity to the high-tech Research Triangle Park tenants and surrounding Triangle cities and other premier universities, plus state and local government centers. These factors contribute to the community's economic vitality, growth and stability, help to sustain the steady employment and income trends, and generally shield the region from the cyclical lows of occasional economic downturns.

Orange County has also not historically had a large presence of traditional industries employing lower-skilled labor, like textiles & furniture, which have increasingly relocated off-shore and reduced local employment across other parts of North Carolina. As a result, Orange County routinely ranks among the top 1 – 3 North Carolina counties with the lowest unemployment rate, enjoys the highest per capita income level, and has the highest percentage of local residents holding 4-year and higher education degrees.

A variety of state and local government agencies, educational institutions, non-profits and private interests all contribute toward workforce preparedness on behalf of Orange County's residents who seek skills training and employment opportunities. Such agencies include:

- local public school systems' Career and Technical Education (CTE) curriculum for Orange County & Chapel Hill/Carrboro high school students
- Durham Technical Community College (new Hillsborough campus)
- University of North Carolina at Chapel Hill
- State employment agencies such as "NCWorks" (503 W. Franklin Street, Chapel Hill)
- Local nonprofits such as EmPowerment, Inc.(109 N. Graham Street, Chapel Hill) and OE Enterprises, Inc. (Hillsborough)
- Orange County Department of Social Services' membership in the 5-county "Regional Partnership Workforce Development Board", which helps funds various employment & training solutions for job applications and employers.

FINANCIAL IMPACT: There is no financial impact associated with the presentation on Orange County Employment and Labor Statistics.

SOCIAL JUSTICE IMPACT: There is no Orange County Social Justice Goal impact associated with this informational report.

RECOMMENDATION(S): The Manager recommends that the Board receive the report and provide comments to staff as necessary.

Advertised Jobs
Education Levels Workforce Job Openings
Industries Wages Employers
Occupations Labor Force
Employment Median Income
Unemployment
Available Candidates
Commuting Patterns

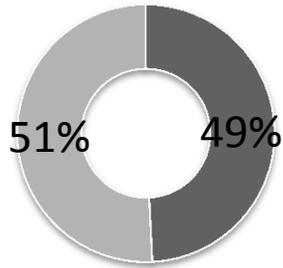
Labor Market Analysis

May 10, 2016

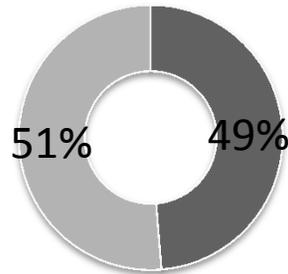
Population

People	UNITED STATES	North Carolina	Orange County	Carrboro	Chapel Hill	Hillsborough
Population estimates, 2010	308,758,105	9,535,691	133,702	19,589	57,233	6,095
Population estimates, 2014	318,857,056	9,943,964	140,420	20,984	59,376	6,388
Population, % change – 2010 - 2014	3.3%	4.3%	5.0%	7.1%	3.7%	4.8%

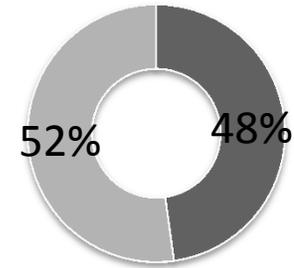
United States



North Carolina



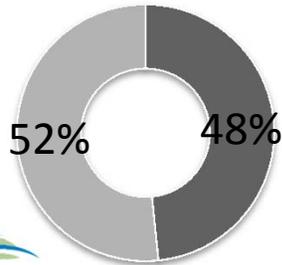
Orange County



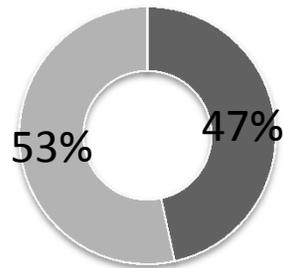
■ Female

■ Male

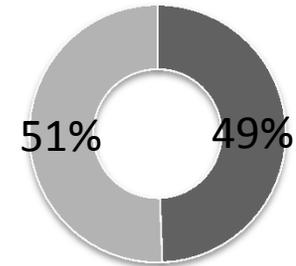
Carrboro



Chapel Hill

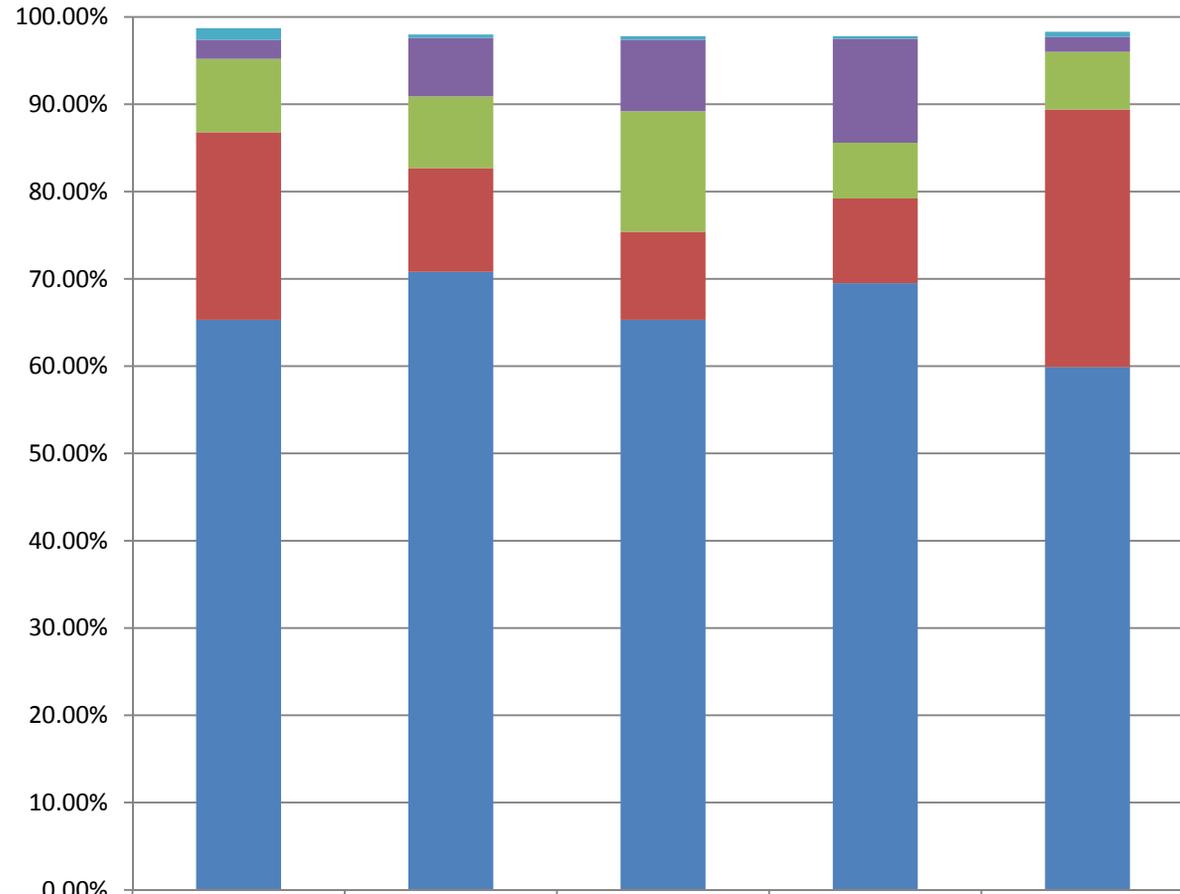


Hillsborough



Source: U.S. Census, QuickFacts

Population by Race



	North Carolina	Orange County	Carrboro	Chapel Hill	Hillsborough
American Indian/Alaska Native	1.30%	0.40%	0.40%	0.30%	0.60%
Asian	2.20%	6.70%	8.20%	11.90%	1.70%
Hispanic or Latino	8.40%	8.20%	13.80%	6.40%	6.60%
Black	21.50%	11.90%	10.10%	9.70%	29.50%
White	65.30%	70.80%	65.30%	69.50%	59.90%

Education Level

	High School Degree or Higher	Bachelor's Degree or Higher
United States	86.0%	28.0%
North Carolina	84.9%	27.3%
Orange County	91.0%	55.8%
Carrboro	90.7%	65.1%
Chapel Hill	94.7%	73.9%
Hillsborough	84.9%	36.5%

Education

Education Level of Available Candidates

Minimum Education Level	Potential Candidates	Percent
<High School	203	1.92%
High School Diploma or Equivalent	2,385	22.59%
1 to 3 years at College or a Technical or Vocational School	1,822	17.26%
Vocational School Certificate	649	6.15%
Associates Degree	1,105	10.47%
Bachelors Degree	2,715	25.72%
Masters Degree	1,340	12.69%
Doctorate Degree	263	2.49%
Specialized Degree (e.g. MD, DDS)	76	0.72%

Individuals with active resumes in the workforce system as of May 1, 2016

Education Requirement on Advertised Jobs

Minimum Education Level	Potential Candidates	Percent
<High School	167	18.87%
High School Diploma or Equivalent	150	16.95%
1 to 3 years at College or a Technical or Vocational School	2	0.23%
Vocational School Certificate	3	0.34%
Associates Degree	24	2.71%
Bachelors Degree	288	32.54%
Masters Degree	52	5.88%
Doctorate Degree	196	22.15%
Specialized Degree (e.g. MD, DDS)	3	0.34%

Online advertised jobs data as of May 1, 2016

Experience

Work Experience Levels of Available Candidates

Minimum Experience	Potential Candidates	Percent
<1 year	979	9.27%
1 Year – 2 Years	382	3.62%
2 Years – 5 Years	934	8.85%
5 Years – 10 Years	1,285	12.17%
More than 10 Years	6,978	66.09%

Individuals with active resumes in the workforce system as of May 1, 2016

Work Experience Requirements on Advertised Jobs

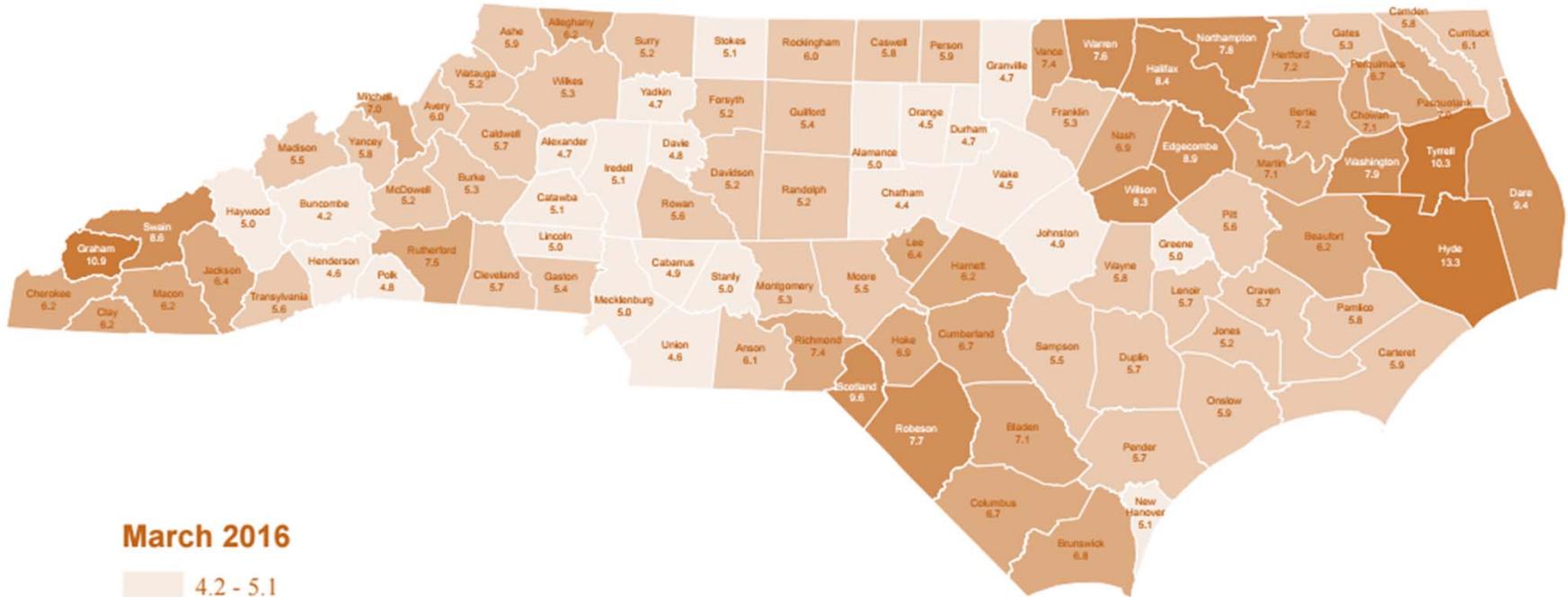
Minimum Experience	Job Openings	Percent
Entry Level	403	62.97%
<1 year	24	3.75%
1 Year – 2 Years	118	18.44%
2 Years – 5 Years	81	12.66%
5 Years – 10 Years	14	2.19%

Online advertised jobs data as of May 1, 2016

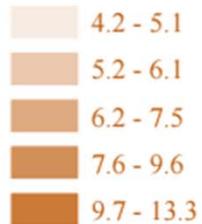
Work Experience Levels of Available Candidates

Rank By Job Openings Advertised	Rank By # of Potential Candidates	Occupation Group	Job Openings	Potential Candidates
1	14	Healthcare Practitioner and Technical Occupations	629	149
2	17	Education, Training, and Library Occupations	284	124
3	2	Management Occupations	227	761
4	9	Food Preparation and Serving Related Occupations	174	192
5	1	Office and Administrative Support Occupations	151	1,114

North Carolina Unemployment Rates by County March 2016



March 2016



- ^ 0 Counties Higher Than Previous Month
- ✓ 100 Counties Lower Than Previous Month
- = 0 Counties Same as Previous Month

North Carolina Rate 5.4%
Not Seasonally Adjusted



Note: March 2016 data are preliminary.
Prepared by Labor & Economic Analysis, North Carolina Department of Commerce 4_2016

Unemployment Rate

March 2016

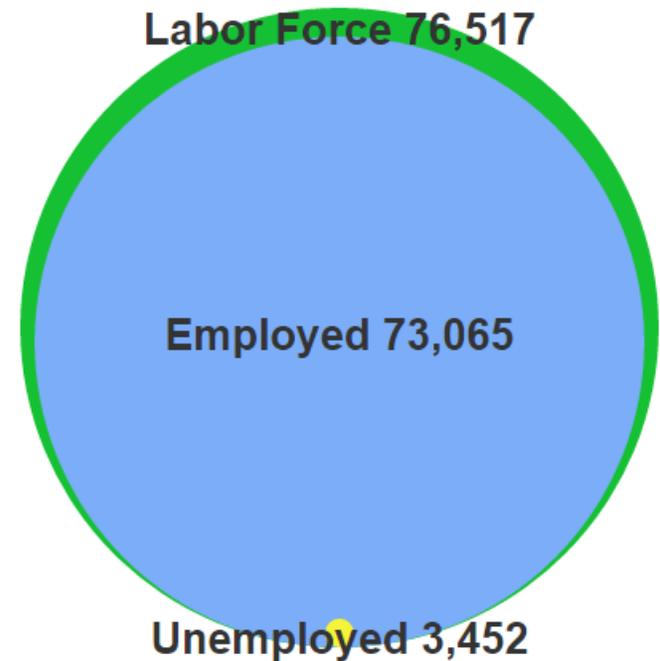
Unemployment

Rates



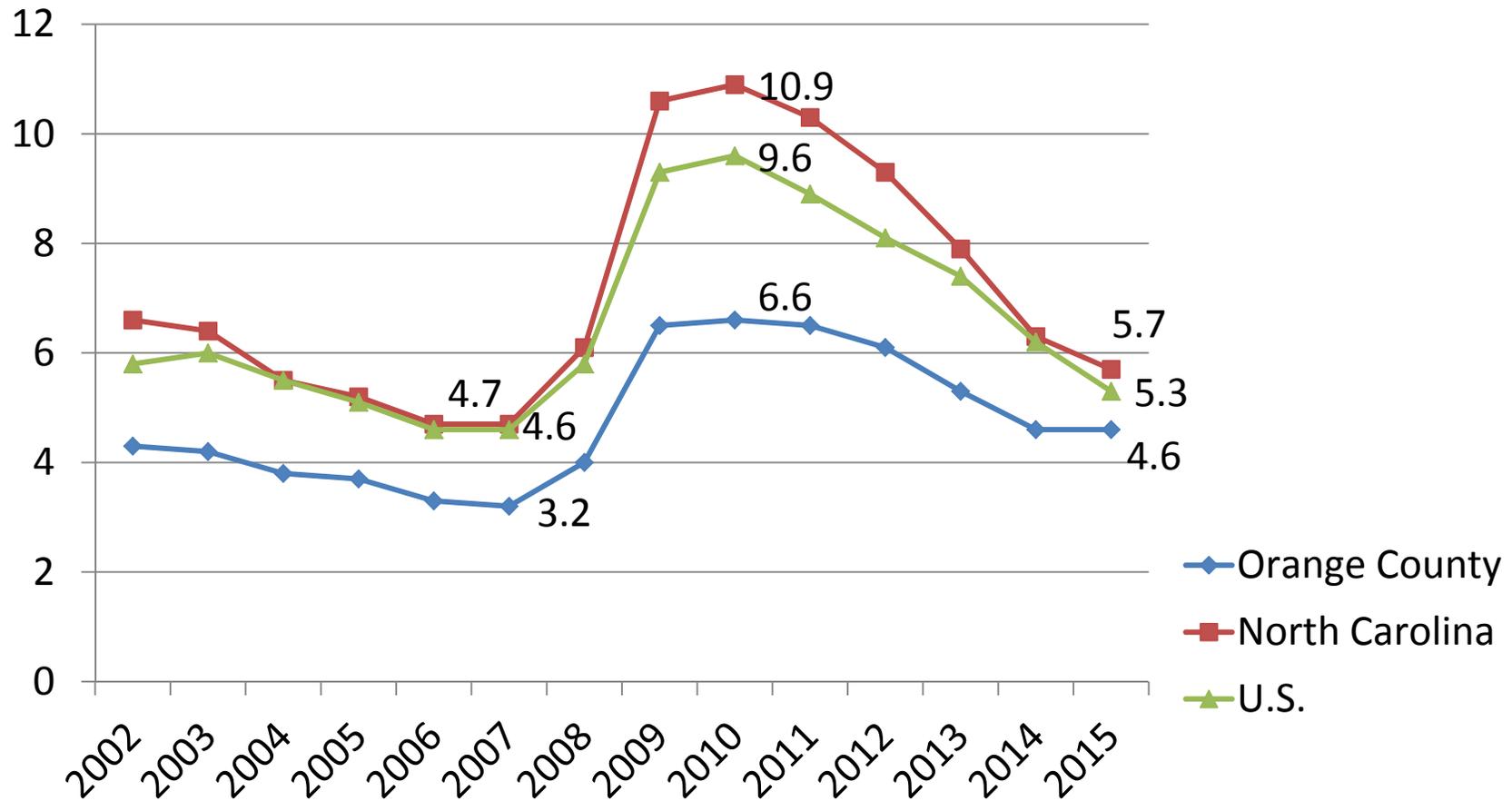
Decreased in all 100 NC counties

Area	March 2016 Unemployment Rate	February 2016
United States	↓ 5.1%	5.2%
North Carolina	↓ 5.4%	5.7%
Orange County	↓ 4.5%	4.7%



**6,433 Job openings advertised
March, 2016**

Unemployment Rate Trend



Orange County Employment

Top Five Specialized Industries, By Employment, 2015

Government – 35,100 Jobs

52.2%

Trade, Transport & Utilities – 7,700 Jobs

11.5%

Leisure & Hospitality – 6,400 Jobs

9.5%

Education & Health – 5,800 Jobs

8.6%

Other Services – 2,700 Jobs

4.0%

Orange County Employment

Industry Employment Distribution

Industry	Employees	Establishments	2015 Q3 Avg Weekly Wage	Current Industry Job Openings
Health Care and Social Assistance	16,049	413	\$854	660
Retail Trade	6,877	376	\$533	224
Accommodation and Food Services	6,069	331	\$338	152
Education	3,708	N/A	\$826	1,141
Professional Scientific & Technical Services	2,764	789	\$1,556	39
Public Administration	2,631	26	\$869	25
Other Services (except Public Admin.)	2,275	517	\$636	32
Construction	1,560	308	\$913	3
Manufacturing	1,523	85	\$1,008	12
Admin., Support, Waste Mgmt., Remediation	1,165	208	\$715	70

Orange County Employment

Industry Employment Distribution

Industry	Employees	Establishments	2015 Q3 Avg Weekly Wage	Current Industry Job Openings
Finance and Insurance	1,135	188	\$1,818	39
Wholesale Trade	958	165	\$1,225	4
Information	888	NA	\$1,743	19
Real Estate and Rental and Leasing	857	147	\$814	16
Arts, Entertainment, and Recreation	788	71	\$412	1
Transportation & Warehousing	605	37	\$881	25
Management of Comp. & Enterprises	368	15	\$1,096	2
Utilities	218	165	\$1,249	5
Ag. Forestry, Fishing & Hunting	198	29	\$699	2

Orange County Top Employers

UNC Chapel Hill (11,920) *	AKG North America, Inc. (348)
UNC Health Care System (10,262) *	General Electric Corp (460)
Chapel Hill – Carrboro City Schools (1,900) *	PHE, Inc. (365)
Orange County Schools (1,270)	Armacell (250)
Orange County Government (800)	Food Lion (258)
Town of Chapel Hill (700)	Weaver Street Market (270)
West Rock (400)	Performance Automall (225)
Soccer.com/Sports Endeavors (275)	A Southern Season (200)
UNC Physicians Network (280)	Residential Services (140)
Walmart (325)	Aramark *
Harris Teeter (590)*	Carolina Inn (294)*

* Employers with the highest number of job openings advertised online

Wage Statistics

Employment Wage

Rank	Area Name	Total Average Employment	Average Hourly Wage	Average Weekly Wage	Average Annual Wage
1	Durham County	190,022	\$30.78	\$1,231	\$64,012
2	Mecklenburg County	634,843	\$27.98	\$1,119	\$58,188
3	Orange County	67,636	\$24.65	\$986	\$51,272
4	Wake County	517,091	\$24.58	\$983	\$51,116
	North Carolina	4,160,803	\$21.58	\$863	\$44,876

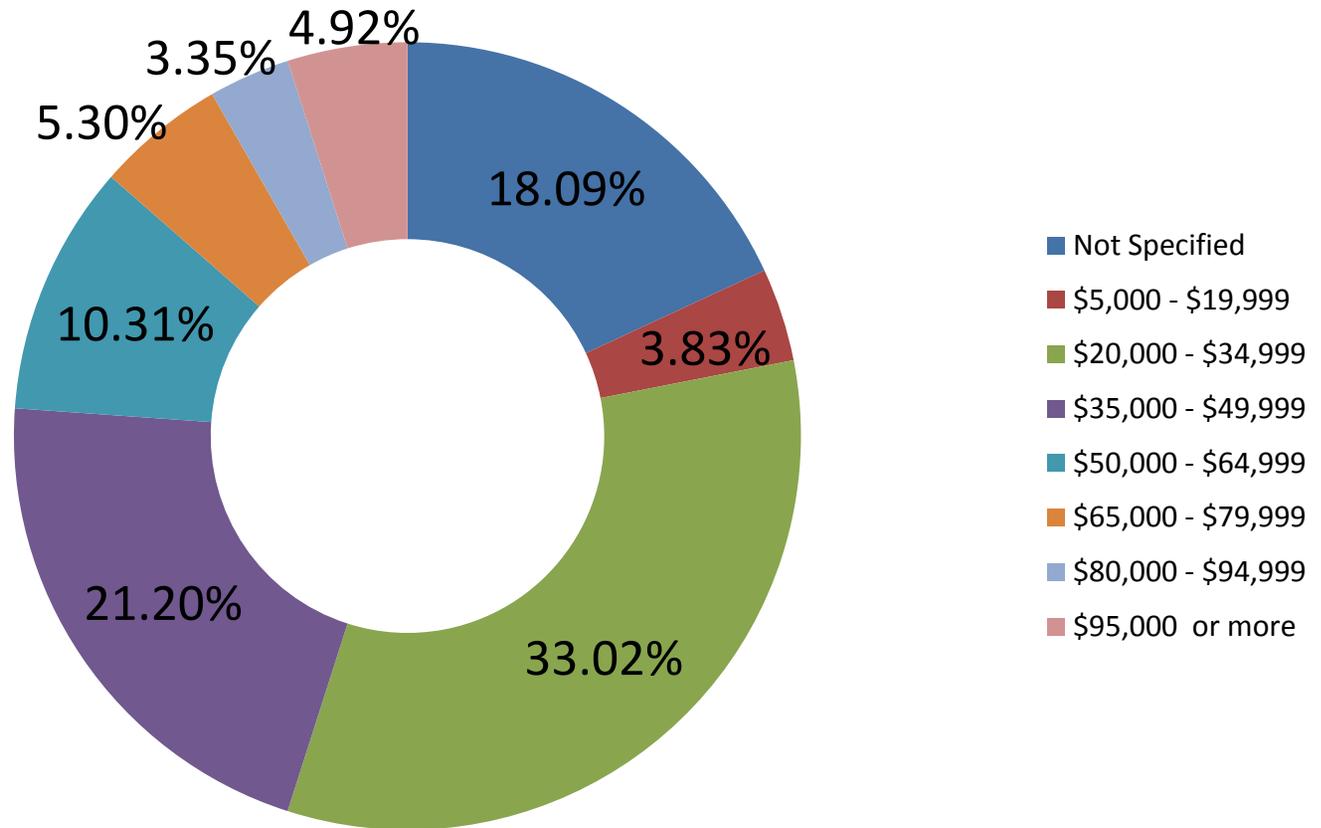
LEAD – 3rd Quarter, 2015



Orange County ranks 3rd in North Carolina with an Average Hourly Wage of \$24.65

Source: NCWorks

Targeted Wage



Minimum Desired Wage of Available Candidates

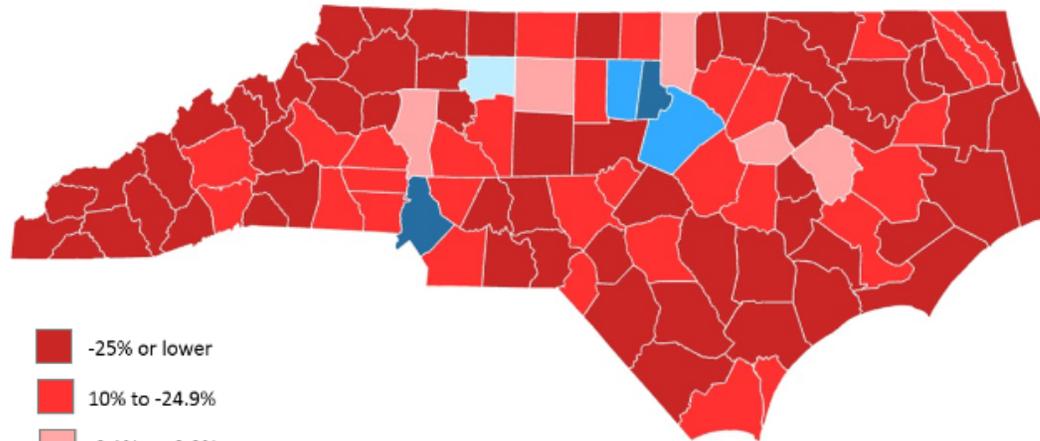
Individuals with active resumes in the workforce system seeking employment in Orange County as of May 1, 2016



Source: NCWorks

Wage vs. Income

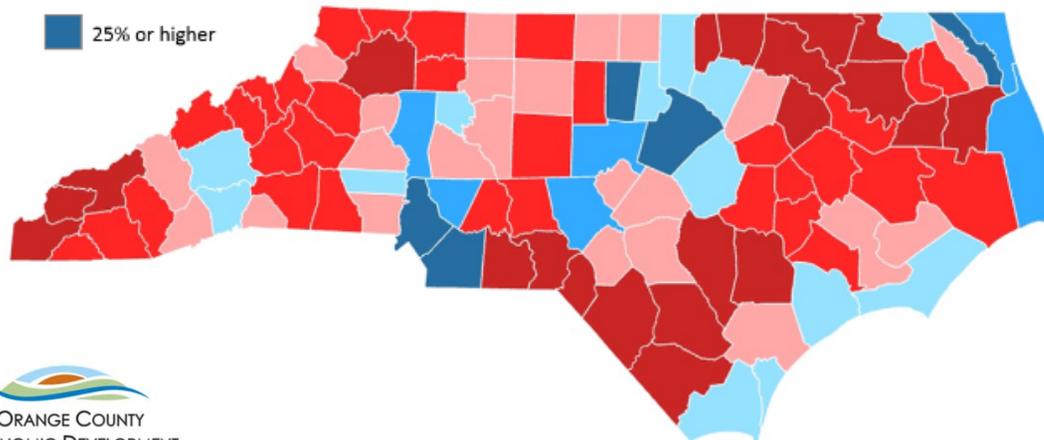
Average Annual Wage, 2014



Where people work

- Five counties above the State Average Annual Wage
- \$46,280 - Average Annual Wage in NC, 2014
 - \$54,288 - Average Annual Wage in Orange County, 2014
 - \$66,092 – Average Annual Wage in Durham County, 2014
 - \$53,820 – Average Annual Wage in the U.S., 2014

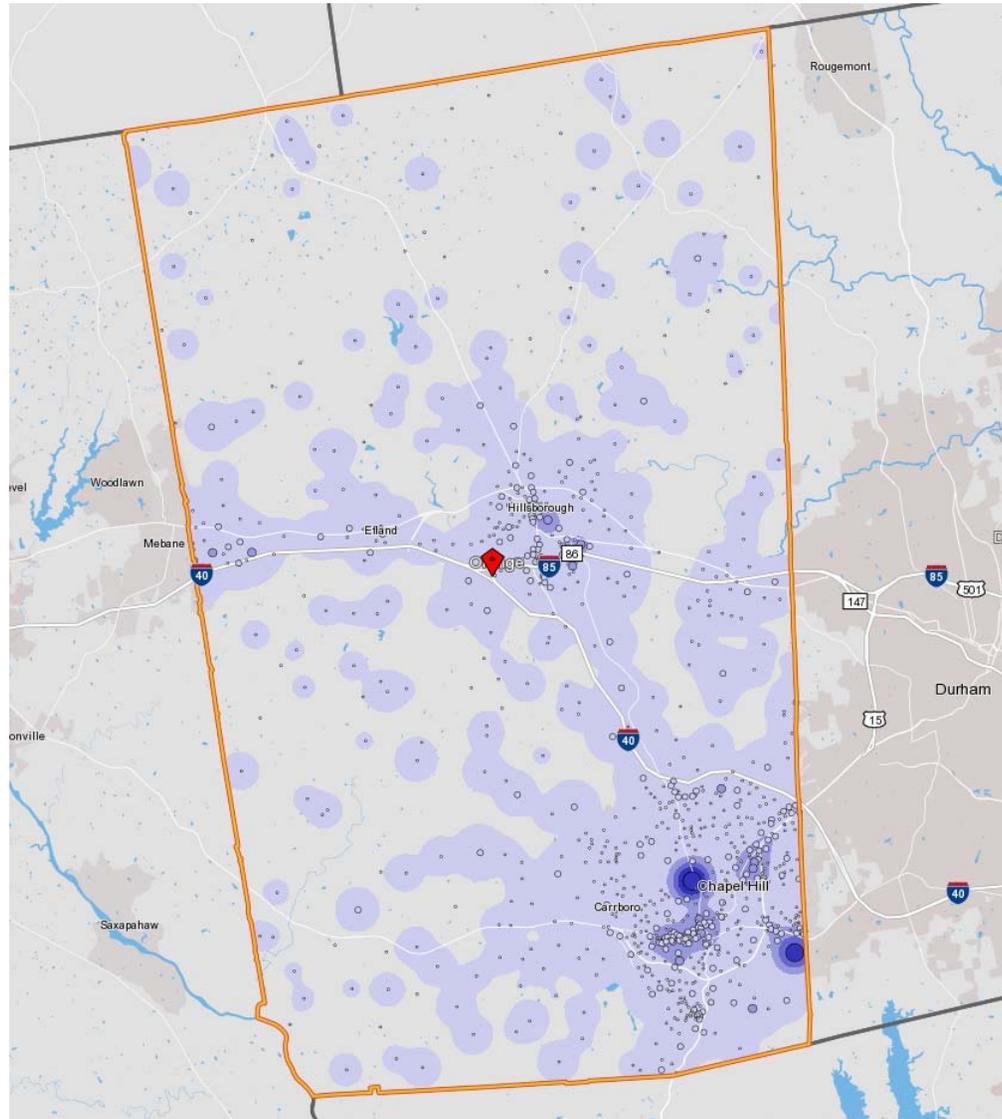
Median Household Income, 2014



Where people live

- 24 counties above the State Median Household Income
- \$46,596 - Median Household Income in NC, 2014
 - \$60,304 – Median Household Income in Orange County, 2014
 - \$66,950 – Median Household Income in Wake County, 2014
 - \$51,759 – Median Household Income in the U.S., 2014

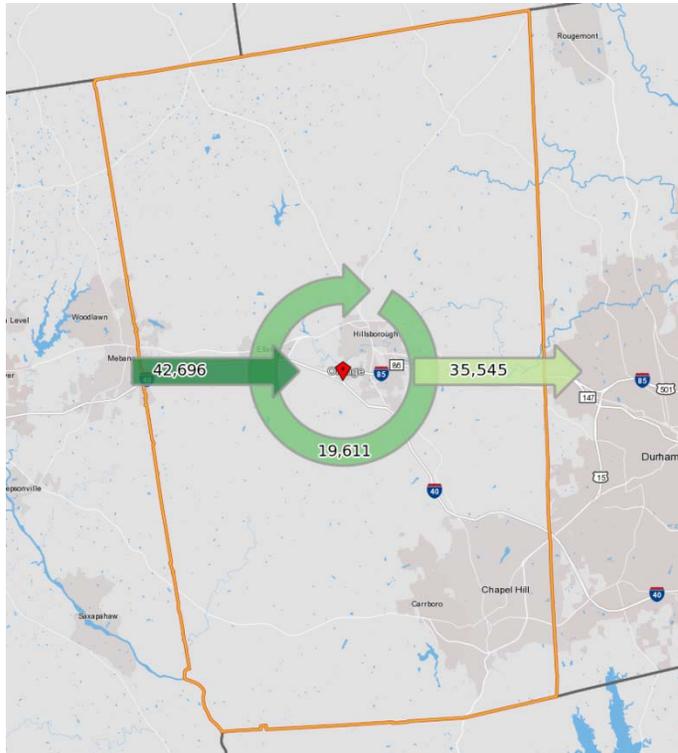
Orange County Work Area Profile Analysis



- 5 - 1,745 Jobs/Sq.Mile
- 1,746 - 6,968 Jobs/Sq.Mile
- 6,969 - 15,672 Jobs/Sq.Mile
- 15,673 - 27,857 Jobs/Sq.Mile
- 27,858 - 43,525 Jobs/Sq.Mile
- 1 - 28 Jobs
- 29 - 443 Jobs
- 444 - 2,239 Jobs
- 2,240 - 7,076 Jobs
- 7,077 - 17,274 Jobs

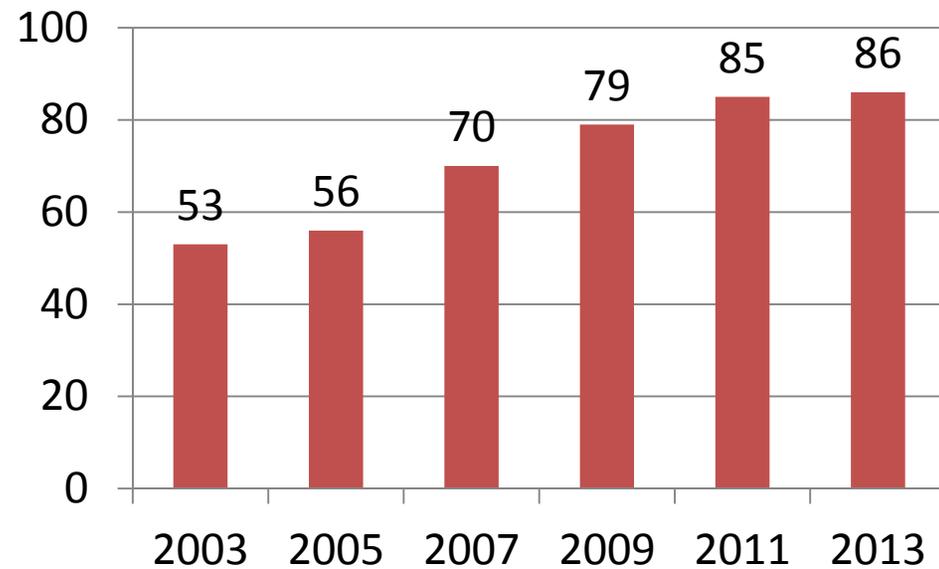
In & Out Migration

Orange County



Source: OnTheMap

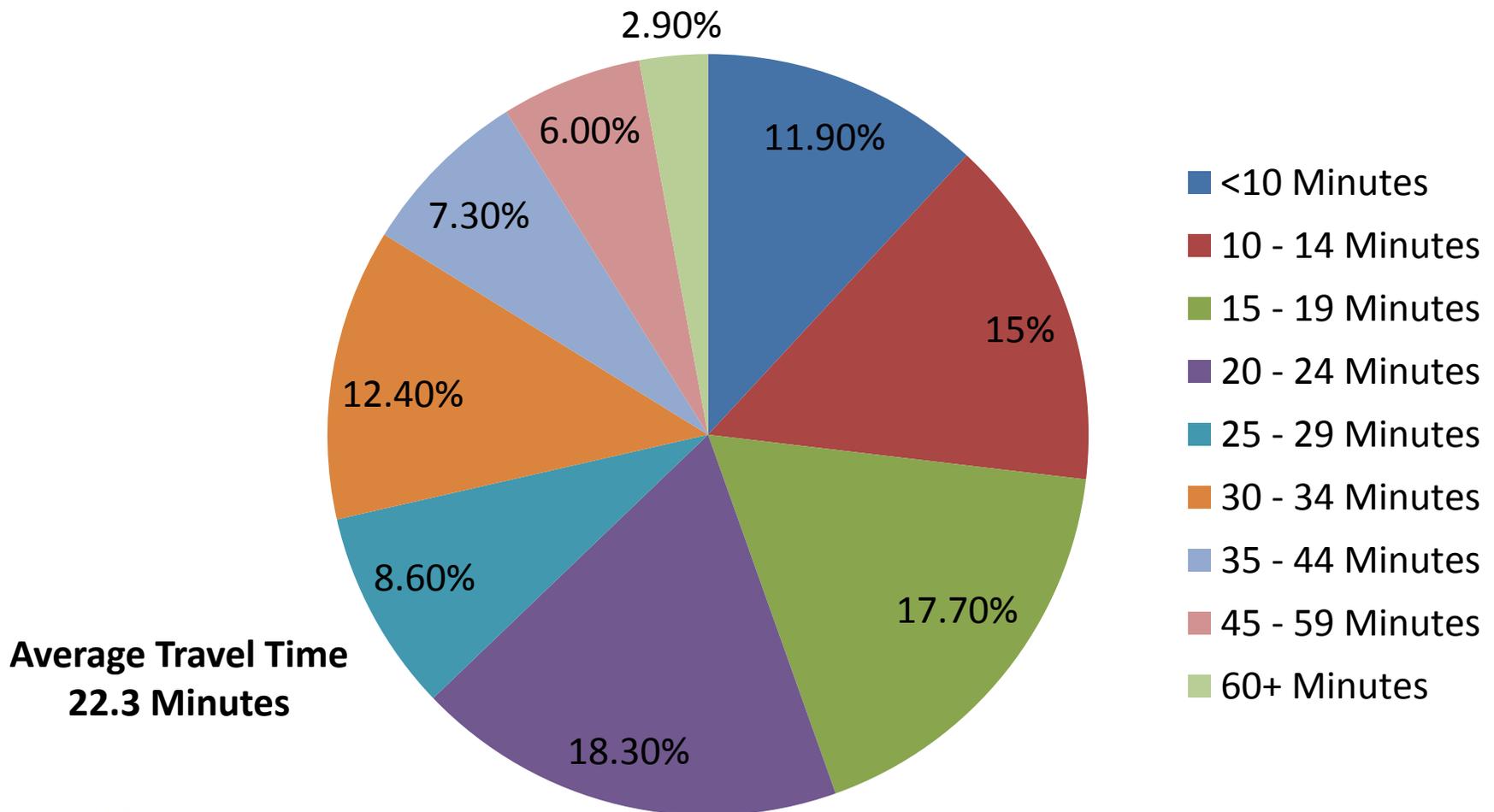
Number of North Carolina Counties Where 50% or More of the Residents Work in a Different County



Source: NC Commerce - LEAD

Durham and Orange counties have the largest proportion of in-commuters

Orange County Commute Time



Percent of Workers, By Travel Time

Source: NC Commerce – AccessNC, 2014 Est.

**ORANGE COUNTY
BOARD OF COMMISSIONERS**

ACTION AGENDA ITEM ABSTRACT

Meeting Date: May 10, 2016

**Action Agenda
Item No. 3**

SUBJECT: Orange County Property Naming Policy

DEPARTMENT: County Manager

ATTACHMENT(S):

- A. Orange County Property Naming Policy-AMENDED 11-9-2005
- B. Orange County Property Naming Policy-AMENDED 3-3-2009
- C. Orange County Property Naming Policy-AMENDED 11-17-2015
- D. List of County Named Facilities
- E. Comparison of Naming Policies

INFORMATION CONTACT:

Bonnie Hammersley, 919-245-2300

PURPOSE: To discuss the Orange County Property Naming Policy and discuss the possible adoption of an amendment.

BACKGROUND: On March 1, 2016 Commissioner Bernadette Pelissier petitioned that the Orange County Property Naming Policy be discussed at a BOCC work session. Specifically, Commissioner Pelissier as well as other Commissioners have requested that the naming policy discussion include clarification on the following issues:

- Under what circumstances should a property be named
- What can be named
- Should a County property be named for a living person
- Definition of renaming a property

In addition, attached to this abstract are 1) the three (3) previous abstracts to amend the policy; 2) a list of County owned properties that have been named for an individual; and 3) a benchmark analysis of organizational naming policies in the area.

FINANCIAL IMPACT: There is no immediate financial impact related to this discussion.

SOCIAL JUSTICE IMPACT: The following Orange County Social Justice Goal is applicable to this item:

- **GOAL: ENABLE FULL CIVIC PARTICIPATION**
Ensure that Orange County residents are able to engage government through voting and volunteering by eliminating disparities in participation and barriers to participation.

RECOMMENDATION(S): The Manager recommends that the Board receive this information and provide direction regarding an amended policy for adoption at an upcoming regular meeting.

COPY

ORANGE COUNTY
BOARD OF COMMISSIONERS

ACTION AGENDA ITEM ABSTRACT
Meeting Date: November 9, 2005

Action Agenda
Item No. 4

SUBJECT: Proposed Revisions to the Policy for Naming of County Owned Buildings and Facilities

DEPARTMENT: Board of County Commissioners

PUBLIC HEARING: (Y/N)

No

ATTACHMENT(S):
Policy for Naming of County Owned Buildings And Facilities

INFORMATION CONTACT:
Commissioner Moses Carey

PURPOSE: To consider a proposed revision to the Policy for the Naming of County Owned Buildings and Facilities.

BACKGROUND: The Board of County Commissioners adopted a policy for the Naming of County Owned Buildings and Facilities (attachment) in 1989. Since then, there have not been any updates/revisions to the policy.

The Chair of the Board of County Commissioners, after discussion with the Vice-Chair, is proposing that the Board update its current policy for naming county owned buildings to exclude the Manager from the recommendation process (item #4 on current policy), and would like the Board to consider this revision to the policy.

- To revise the policy to remove the current process requirement that the Manager must make a recommendation to the Board of Commissioners after a request is made

Any policy change would not require a public hearing.

FINANCIAL IMPACT: None

RECOMMENDATION(S): The Manager recommends that the Board consider the proposed revision to the Policy for Naming of County Owned Buildings and Facilities.

POLICY FOR INSERTION INTO THE POLICY MANUALMEETING DATE: February 21, 1989NUMBER: A:0390EFFECTIVE DATE: February 21, 1989REVISIONS: _____POLICY:NAMING OF COUNTY OWNED BUILDINGS AND FACILITIES POLICYORANGE COUNTY POLICY AND PROCEDURE CONCERNING THE NAMING OF
COUNTY OWNED BUILDINGS AND FACILITIES

The following policy and procedure shall apply to the naming or renaming of buildings and facilities owned by Orange County.

1. County owned buildings and facilities shall bear such names as the Orange County Board of Commissioners shall approve pursuant to this policy.
2. Any person, firm or association may propose a name for a County owned building or facility. Such proposal shall be made in writing and filed with the County Manager.
3. The County Manager shall prepare a report concerning the proposed naming. The report shall contain such information as the County Manager deems appropriate but should, in most instances, contain the following information;
 - a. The proposed name of the facility;
 - b. The existing name of the facility, if applicable;
 - c. Whether other County buildings or facilities bear the proposed name;
 - d. Whether the same name is proposed and currently pending for some other publicly owned building or facility within Orange County.
 - e. If the building or facility is frequented by the public for a number and variety of uses, whether the proposed name would be confusing because of other public or private facilities or structures bearing the same or similar name;
 - f. A brief description of the building or facility for which the name is proposed;
 - g. If the proposed name is that of an individual, an inclusive description of the individual's contribution to the community should be included.

4. The report and the Administration's recommendation shall be made to the Orange County Board of Commissioners by the County Manager.
5. Upon receipt of the report and the recommendation, the Board of Commissioners will consider the adoption of a resolution stating its intent to consider the naming or renaming of the building or facility at the next or some subsequent meeting determined by the Board of Commissioners. If the building or facility is a significant public structure, the Board may, at its option, direct that a notice be published informing the public of the Board's intent to consider the naming or renaming of the proposed building or facility and the fixing of a time and place for a public hearing on the question.
6. The building or other facility shall bear the name assigned to it by the Board from and after the date of the Board's approving action or such subsequent date as the Board of Commissioners may prescribe.
7. This policy and procedure does not apply to the naming of public streets, roads, alleys, and other similar thoroughfares.
8. Under unusual circumstances and for reasons satisfactory to the Board of Commissioners, the Board may name a County owned building or facility without following the procedures set forth herein.

COPY

ORANGE COUNTY
BOARD OF COMMISSIONERS

ACTION AGENDA ITEM ABSTRACT

Meeting Date: March 3, 2009

Action Agenda

Item No. 6-b

SUBJECT: Orange County Property Naming Policy

DEPARTMENT: County Manager

PUBLIC HEARING: (Y/N)

No

ATTACHMENT(S):

Draft Revised County Property Naming
Policy
Current Facility Naming Policy

INFORMATION CONTACT:

Laura Blackmon, 245-2300

PURPOSE: To consider a draft revision of the Orange County Facility Naming Policy.

BACKGROUND: Orange County adopted a Facility Naming Policy in 1989 that was last revised in 2005. This policy has played a major role over the last few years due to the County's comprehensive construction program. From time to time there have been issues raised in the naming of these new facilities that were not addressed in the current policy. For example, there has been confusion regarding the naming of facilities after individuals, the naming of facilities in conjunction with sponsorship by private entities, and the role of County advisory boards in proposing potential facility names.

Based on these concerns, the Board directed the County Manager to review the current policy and propose revisions to address these issues. The proposed new policy developed by the Manager is attached along with the County's current policy. Highlights of the new policy include:

- 1) An expansion of the term "property" to include buildings, facilities, land, portions of buildings, collections of books, records, etc.
- 2) Working titles to be given for buildings and facilities under construction or renovation and land that is being developed for parks or other county uses
- 3) Official names or titles for property based upon geographical, historical, ecological, or functional uses
- 4) Memorial naming of property in addition to the official name to be made in honor of a deceased individual
- 5) Property named for living persons to be specified only under certain conditions

Upon adoption, this policy would guide the Board and County government as a whole in addressing the naming of public property including facilities, buildings, parks, and sports complexes.

FINANCIAL IMPACT: There is no financial impact associated with Board consideration of the new proposed policy. Depending on the outcome of Board discussion, including any determinations regarding the naming of facilities in conjunction with sponsorship by private entities, some aspects of the policy implementation could have financial impacts.

RECOMMENDATION(S): The Manager recommends the Board discuss the newly proposed Orange County Property Naming Policy, provide feedback and questions to staff, and consider approval of the policy at this meeting or at a future meeting.

Draft Proposed Orange County Property Naming Policy

Policy x.x "Policy Statement"

County owned buildings, facilities and land shall bear such names as the Orange County Board of Commissioners shall approve pursuant to this policy. This policy follows all applicable local, state and federal laws, rules and regulations.

Purpose

This policy is to establish the Board of County Commissioners as the responsible authority for naming County buildings, facilities, and land.

Guidelines

- 2.1. The naming of public buildings, facilities and land shall be done only by the Board of County Commissioners by resolution adopted by majority vote.
 - 2.1.1. Property to be given names or titles shall be either owned by Orange County government or leased by Orange County government for its use.
 - 2.1.2. Properties to be named or given a title include buildings, any areas in buildings, other physical facilities, collections of books, records or other printed or audio-visual materials, land or water areas
 - 2.1.3. Official names or titles for property belonging to the County shall only be changed by the Board of County Commissioners as it deems appropriate.
 - 2.1.4. Current names for property belonging to the County shall remain the same unless changed by the Board of County Commissioners upon relocation or change in function of the property.
 - 2.1.5. No property belonging to Orange County shall be named for living persons with the following exceptions.
 - a. Living persons who make a significant monetary contribution to the development of a public building or facility when such a contribution is made with the intent and agreement of the Board of County Commissioners that said building or facility will be named for the contributor
 - b. Leased property that has been conferred a name by the lessor that is a person's name need not be renamed if it has locational or other value
 - 2.1.6 Official names or titles for property belonging to or leased by the County shall be based upon geographical, historical, ecological, functional, or other such factors as the Board of County Commissioners deems appropriate. If a geographical reference of locational value is derived from the name of a person, such as a street name, it may be used in naming County property.
 - a. A public building/facility under construction/renovation or land purchased for park development or conservation/preservation will be given a "working title" which will only become the official title of the property when formally approved as such by the BOCC
 - b. Memorial naming of a public building, facility or land is in addition to the official title of the building/facility/land and is bestowed in accordance with Section 2.2 of this policy

- c. Leased property naming will respect historical names that may already be attached to the facility or as may be negotiated with the owner of the building.
 - 2.1.7 Exceptions to this policy of naming property belonging to the County may be made by the Board of County Commissioners as it deems appropriate.
 - 2.1.8 This policy does not apply to the naming of public streets, roads, alleys and other similar thoroughfares.
 - 2.1.9 This policy shall not be construed as the mechanism for selling the naming rights to County structures, buildings, facilities or land.
- 2.2. Memorial Naming of Public Buildings, Facilities, or Land: In the event Orange County wishes to honor a deceased individual by naming a public building, facility or land after such an individual, the following shall apply:
- 2.2.1. The person who is being honored by such a memorial shall have made a significant contribution to the well-being and betterment of Orange County.
 - 2.2.2. The party requesting a memorial shall submit a brief biography of the person to Orange County government for recording purposes.
 - 2.2.3. The memorial naming of a public building, facility or land will be in addition to the official name as defined in Section 2.1.6 of this policy.
 - 2.2.4. It is prohibited to rename a public building, facility or land which has previously been named in honor of or in memorial to an individual except in extraordinary circumstances when the Board deems it appropriate.
 - 2.2.5. This policy does not apply to living persons or entities that make a significant monetary contribution to the development of a public building, facility or land when such a contribution is made with the intent and agreement of the Board of County Commissioners that said building, facility or land will be named for the contributor.

Procedures

- 2.3. A public building/facility under construction/renovation or land purchased for park development or conservation/preservation shall be given a "working title" by staff for easy identification of the property.
- 2.4. The proposed naming of a public building, facility or land may be generated in the following manner.
 - a. Staff shall recommend to the BOCC an official title of the public building, facility or land in accordance with Section 2.1.6 of this policy. Such recommended by staff will be made prior to the completion of any project to construct, renovate or develop the property.
 - b. Any person, firm or association may propose a name for a County owned building, facility or land by submitting the proposal in writing to the County Manager or Clerk to the Board.
 - c. Under certain circumstances the BOCC may wish to set in place a public process for soliciting input in the official naming of a public building, facility or land.

- 2.5. The County Manager shall prepare a report with recommendations for the proposed naming of the public building, facility or land and present it to the BOCC for consideration at a regularly scheduled public meeting.
- 2.6. Upon receipt of the report and the recommendations of the manager the BOCC will state its intent to consider the adoption of a resolution for the naming or renaming of the public building, facility or land at the next or some subsequent meeting as determined by the BOCC.
- 2.7. The Board may determine the public building, facility or land is of significant public interest and direct a notice be published informing the public of the Board's intent to consider the naming or renaming of the public building, facility or land and fix a time and place for a public hearing on the question.
- 2.8. Upon approval of the resolution by the BOCC, the public building, facility or land shall bear the name assigned to it from and after the date of Board action or such subsequent date as the BOCC may prescribe.

POLICY FOR INSERTION INTO THE POLICY MANUAL

MEETING DATE: February 21, 1989

NUMBER: A:0390

EFFECTIVE DATE: February 21, 1989

REVISIONS: November 9, 2005

POLICY:

NAMING OF COUNTY OWNED BUILDINGS AND FACILITIES POLICY

ORANGE COUNTY POLICY AND PROCEDURE CONCERNING THE NAMING OF COUNTY OWNED BUILDINGS AND FACILITIES

1. County owned buildings and facilities shall bear such names as the Orange County Board of Commissioners shall approve pursuant to this policy.
2. Any person, firm or association may propose a name for a County owned building or facility. Such proposal shall be made in writing and filed with the County Manager and/or Clerk.
3. The County Manager shall prepare a report concerning the proposed naming. The report shall contain such information as the County Manager deems appropriate but should, in most instances, contain the following information
 - a. The proposed name of the facility;
 - b. The existing name of the facility, if applicable;
 - c. Whether other County buildings or facilities bear the proposed name;
 - d. Whether the same name is proposed and currently pending for some other publicly owned building or facility within Orange County.
 - e. If the building or facility is frequented by the public for a number and variety of uses, whether the proposed name would be confusing because of other public or private facilities or structures bearing the same or similar name;
 - f. A brief description of the building or facility for which the name is proposed;
 - g. If the proposed name is that of an individual, an inclusive description of the individual's contribution to the community should be included
4. The report shall be made to the Orange County Board of Commissioners by the County Manager
5. Upon receipt of the report and the recommendations, the Board of Commissioners will consider the adoption of a resolution stating its intent to consider the naming or renaming of the building or facility at the next or some subsequent meeting determined by the Board of Commissioners. If the building or facility is a significant public structure, the Board may, at its option, direct that a notice be published informing the public of the Boards intent to consider the naming or renaming of the proposed building or facility and the fixing of a time and place for a public hearing on the question.

6. The building or other facility shall bear the name assigned to it by the Board from and after the date of the Board's approving action or such subsequent date as the Board of Commissioners may prescribe.
7. This policy and procedure does not apply to the naming of public streets, roads, alleys, and other similar thoroughfares.
8. Under unusual circumstances and for reasons satisfactory to the Board of Commissioners, the Board may name a County owned building or facility without following the procedures set forth herein.
9. Portions of a building, such as a meeting room or resource center, may bear the name of an individual or group subject to the procedures outlined above.
10. This policy shall not be construed as a mechanism for selling the name rights to county structures or facilities.

COPY

ORANGE COUNTY BOARD OF COMMISSIONERS

ACTION AGENDA ITEM ABSTRACT

Meeting Date: November 17, 2015

Action Agenda Item No. 7-c

SUBJECT: Amendment to the Orange County Property Naming Policy

DEPARTMENT: County Manager

PUBLIC HEARING: (Y/N) No

ATTACHMENT(S):

- 1) Orange County Property Naming Policy-AMENDED

INFORMATION CONTACT:

Bonnie Hammersley, 919-245-2300

PURPOSE: To discuss amending the Orange County Property Naming Policy and consideration adoption of the amendment.

BACKGROUND: On September 1, 2015 Commissioner Barry Jacobs petitioned that the Orange County Property Naming Policy be amended. Specifically, Commissioner Jacobs requested that the amendment to the policy include:

- The addition of language to the policy will provide the BOCC the ability to consider and adopt naming a "room" within a County property. This language has been included in the attached amended policy. Attachment 1
- The addition of language to the policy will provide the BOCC the ability to consider and adopt naming a County property for a person that secures funding for the construction/development of a building or facility. This language has been included in the attached amended policy. Attachment 1

FINANCIAL IMPACT: There is no immediate financial impact related to this discussion.

SOCIAL JUSTICE IMPACT: The following Orange County Social Justice Goal is applicable to this item:

- GOAL: ENABLE FULL CIVIC PARTICIPATION
Ensure that Orange County residents are able to engage government through voting and volunteering by eliminating disparities in participation and barriers to participation.

RECOMMENDATION(S): The Manager recommends that the Board receive this information and adopt the policy as amended.

POLICY FOR INSERTION INTO THE POLICY MANUAL

MEETING DATE: February 21, 1989

NUMBER: A-0390

EFFECTIVE DATE: February 21, 1989

REVISIONS: November 9, 2005
March 3, 2009November 17, 2015**POLICY: Orange County Property Naming Policy****Policy "Policy Statement"**

County owned buildings, facilities and land shall bear such names as the Orange County Board of Commissioners shall approve pursuant to this policy. This policy follows all applicable local, state and federal laws, rules and regulations.

Purpose

This policy is to establish the Board of County Commissioners as the responsible authority for naming County buildings, facilities, and land.

Guidelines

- 2.1. The naming of public buildings, facilities and land shall be done only by the Board of County Commissioners by resolution adopted by majority vote.
 - 2.1.1. Property to be given names or titles shall be either owned by Orange County government or leased by Orange County government for its use.
 - 2.1.2. Properties to be named or given a title include buildings, any areas or rooms in buildings, other physical facilities, collections of books, records or other printed or audio-visual materials, land or water areas
 - 2.1.3. Official names or titles for property belonging to the County shall only be changed by the Board of County Commissioners as it deems appropriate.
 - 2.1.4. Current names for property belonging to the County shall remain the same unless changed by the Board of County Commissioners upon relocation or change in function of the property.
 - 2.1.5. No property belonging to Orange County shall be named for living persons with the following exceptions.
 - a. Living persons who secure funding and/or make a significant monetary contribution to the development/construction of a public building or facility when such a contribution is made with the intent and agreement of the Board of County Commissioners that said building or facility will be named for the contributor
 - b. Leased property that has been conferred a name by the lessor that is a person's name need not be renamed if it has locational or other value

- 2.1.6 Official names or titles for property belonging to or leased by the County shall be based upon geographical, historical, ecological, functional, or other such factors as the Board of County Commissioners deems appropriate. If a geographical reference of locational value is derived from the name of a person, such as a street name, it may be used in naming County property.
- a. A public building/facility under construction/renovation or land purchased for park development or conservation/preservation will be given a "working title" which will only become the official title of the property when formally approved as such by the BOCC
 - b. Memorial naming of a public building, facility or land is in addition to the official title of the building/facility/land and is bestowed in accordance with Section 2.2 of this policy
 - c. Leased property naming will respect historical names that may already be attached to the facility or as may be negotiated with the owner of the building.
- 2.1.7 Exceptions to this policy of naming property belonging to the County may be made by the Board of County Commissioners as it deems appropriate.
- 2.1.8 This policy does not apply to the naming of public streets, roads, alleys and other similar thoroughfares.
- 2.1.9 This policy shall not be construed as the mechanism for selling the permanent naming rights to County structures, buildings, facilities or land.
- 2.2. Memorial Naming (in honor of a deceased individual) of Public Buildings, Facilities, or Land: In the event Orange County wishes to honor a deceased individual by naming a public building, facility or land after such an individual, the following shall apply:
- 2.2.1. The person who is being honored by such a memorial shall have made a significant contribution to the well-being and betterment of Orange County.
 - 2.2.2. The party requesting a memorial shall submit a brief biography of the person to Orange County government for recording purposes.
 - 2.2.3. The memorial naming of a public building, facility or land will be in addition to the official name as defined in Section 2.1.6 of this policy.
 - 2.2.4. Renaming a public building, facility or land which has previously been named in honor of or in memorial to an individual shall only be done in extraordinary circumstances as determined by the Board.

Procedures

- 2.3. A public building/facility under construction/renovation or land purchased for park development or conservation/preservation shall be given a "working title" by staff for easy identification of the property.

- 2.4. The proposed naming of a public building, facility or land may be generated in the following manner.
 - a. Staff shall recommend to the BOCC an official title of the public building, facility or land in accordance with Section 2.1.6 of this policy. Such recommended by staff will be made prior to the completion of any project to construct, renovate or develop the property.
 - b. Any person, firm or association may propose a name for a County owned building, facility or land by submitting the proposal in writing to the County Manager or Clerk to the Board.
 - c. Under certain circumstances the BOCC may wish to set in place a public process for soliciting input in the official naming of a public building, facility or land.
- 2.5. The County Manager shall prepare a report with recommendations for the proposed naming of the public building, facility or land and present it to the BOCC for consideration at a regularly scheduled public meeting.
- 2.6. Upon receipt of the report and the recommendations of the manager the BOCC will state its intent to consider the adoption of a resolution for the naming or renaming of the public building, facility or land at the next or some subsequent meeting as determined by the BOCC.
- 2.7. The Board may determine the public building, facility or land is of significant public interest and direct a notice be published informing the public of the Board's intent to consider the naming or renaming of the public building, facility or land and fix a time and place for a public hearing on the question.
- 2.8. Upon approval of the resolution by the BOCC, the public building, facility or land shall bear the name assigned to it from and after the date of Board action or such subsequent date as the BOCC may prescribe.

ATTACHMENT D

BOARD OF ORANGE COUNTY COMMISSIONERS
Naming Policy Discussion
List of County-Owned Named Facilities
May 10, 2016

Name of Facility	Facility Type/Location	Date Named (Estimated)
Richard E. Whitted Facility	County Services: Hillsborough	1987
Robert and Pearl Seymour Center	County Senior Center; Chapel Hill	2006
John M. Link, Jr. Government Services Center	County Administrative Services; Hillsborough	2006
Jerry M. Passmore Center	County Senior Center; Hillsborough	2016
McDougle Elementary School	Elementary School; Chapel Hill	1996
Mary Scroggs Elementary School	Elementary School; Chapel Hill	1999
C.W. Stanford Middle School	Middle School; Hillsborough	1968

The schools listed above are County-owned properties. The school systems named these facilities based on school system facility naming policies. There are other named schools, such as Rashkis Elementary and A.L Stanback Middle, that are not County-owned and were also named based school system facility naming policies.

Summary Comparison of Adopted Local Government, Public School, and University Facility Naming Policies

Organization	Can Name for a Living Person	Requires Public Process	Can Name a Portion of a Facility (room, park, etc..)	Can Name for Capital Funding Contributors	Governing Board Voting Process	Latest Date of Revision
Town of Cary	Yes	Yes	No	Yes	Town Council	3/27/2014
Chapel Hill - Carrboro City Schools	Yes	Yes	Not specified	Yes	Board of Education	Not Listed
Durham County Library	Yes	Yes	Yes	Yes	Review by Library Committee before submission to County Board of Commissioners	Not listed
City of Greensboro Public Library	Yes	Yes (public hearing	Yes	Yes	Two thirds of Library Board	8/17/1992
City of Greensboro Parks and Rec. Department	Yes	Yes (3 public hearings)	Yes	Yes	Park Commission approval before submission to City Council	1/11/2012
Lee County	Yes	Yes	Yes	Yes	County Board of Commissioners	5/2/2005
Mecklenburg County	Yes	Not specified	Not specified	Yes	County Board of Commissioners	10/15/2013
NC A& T University	Yes	Not specified	Yes	Yes	University Board of Trustees	2/18/2011
NC State University	Yes	Not specified	Not specified	Yes	University Board of Trustees	4/22/2011
New Hanover County Schools	Not Specified	Yes	Yes	Not specified	County Board of Education	2/15/14
UNC Chapel Hill	Yes	Not Specified	Yes	Yes	University Board of Trustees Approval	9/23/2010