

ORANGE COUNTY BOARD OF COMMISSIONERS

AGENDA

BOCC Regular Work Session
September 8, 2016
Meeting – 7:00 p.m.
Southern Human Services Center
2501 Homestead Road
Chapel Hill, NC

- | | | |
|----------------|----|--|
| (7:00 – 8:30) | 1. | Discussion of the Proposed Orange County FY 2016 - 2020
Affordable Housing Strategic Plan |
| (8:30 – 9:15) | 2. | Greene Tract Historical Information and Options |
| (9:15 – 10:00) | 3. | General Fund Unassigned Fund Balance 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: September 8, 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. Information for Discussion on the Proposed *Orange County 2016 – 2020 Affordable Housing Strategic Plan*
- B. Excerpt from May 10, 2016 Board Meeting Approved Minutes
- C. Mobile Home Data, Map and Fact Sheet

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 Orange County Board of Commissioners (Board) received the *Proposed 2016 – 2020 Affordable Housing Strategic Plan* (Plan) 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 Plan prior to holding a work session scheduled for May 10, 2016.

At the May 10, 2016 Work Session, the Board received and discussed a summary of community engagement meetings and comments on the Plan. With the Board Work Session of May 10, 2016, the Board has discussed all the recommendations of the Plan (Attachment B). All the recommendations received the go ahead, except AR2 and AR3 recommendations concerning the potential role of the Orange County Housing Authority possibly managing County-owned affordable housing. The two items were recommended to be combined and will require further investigation.

In follow-up to the Board's discussion above on the Plan recommendations, there were two major items that the Board requested additional information from staff; to bring back recommendations for:

- a mobile home strategy and
- the process for going forward with the Greene Tract.

Staff has also included a few other discussion items for further clarification in moving forward:

- the Board's criteria and priorities on the use of land banking,
- moving forward on use of County-owned property,
- planning initiatives to further affordable housing,
- the County's 1,000 units goal and special needs housing; and
- criteria or other areas of emphasis the Board would like included to address affordable housing needs in the county

The Plan has identified ten goals with strategies, recommendations and actions to implement each goal. Following discussion by the Board at this Work Session, staff requests approval to prepare the final draft of the Plan incorporating Board and community comments. With regard to next steps, the Plan will need to be implemented in phases and that with the Board's approval of the Plan, staff will bring back to the Board detailed work plans and metrics in consultation and collaboration with community and municipal partners and county agencies.

Staff has included in the materials examples of innovations and successes from other communities particularly with regard to use of mobile homes to meet special affordable housing needs (Attachments A and C).

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 review and discuss the information provided on the *Proposed 2016 – 2020 Affordable Housing Strategic Plan* and provide direction to staff.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

A. Purpose of Work Session

- Follow-up to the Board's Questions and Discussions on the Plan
- Consider Approval for Staff to Prepare the Final Draft of the Orange County Affordable Housing Strategic Plan 2016 - 2020 for the Board's Adoption

B. Information Provided for Board Discussion

Information is provided in order of the following topics to assist the Board in its discussion and decisions on the proposed Orange County Affordable Housing Strategic Plan 2016 – 2020. For each of the six topics and discussion questions, there is a brief description of the information that has been provided for the Board's reference:

1. The Affordable Housing Gap in Orange County and Special Needs

Q1: The 1000 Units proposed by the Plan would address approximately 11% to 13% of the households cost burdened at housing costs over 30% to 50% of income. Are there any additional questions about the Goal of 1000 Affordable Units over the next five years (through community, nonprofit, intergovernmental and private sector partnerships) to address the greatest needs priority; rental homes for extremely low income (persons and families with incomes at or below 30% of median income and special needs populations? Followed by workforce housing and homeownership assistance for persons and families at or below 50% to 80% median?

Background Information provided: definition of affordable housing and housing needs data on populations cost burdened, those with special needs including information on supportive housing needs, Single Room Occupancy (SROs) and units developed with the 1997 and 2001 Bonds for affordable housing.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

2. Land Banking

Q2: BOCC Discussion Question: What are the Board's criteria and priorities for land banking?

Background Information provided: definition of land banking and land trusts and examples of each, Northside Land Bank, Chapel Hill and Community Home Trust respectively.

3. Mobile Homes in the County: Background Information and Strategies

Q3: Are the strategies provided viable options to consider and what are the concerns and the guidance by the Board?

Background Information provided: information on the county's mobile home inventory; strategies to support and develop the inventory and some of the strengths, opportunities and challenges. Examples are also provided of mobile home programs that have been successful in meeting their affordable housing goals from Chesapeake Virginia, City of Richmond, Virginia, New Jersey and Michigan.

4. Use of County Owned Property and Update on the Greene Tract

Q3: Staff is ready to move to next steps for use of some of county owned land and prepare request for proposals (with the exception of the two largest properties, the Greene tract and Southern Human Services Campus); is the Board in agreement with staff proceeding?

Background Information provided: Brief update on the status of this Item.

5. Planning Initiatives to Further Affordable Housing

Q4: Are there other planning issues and opportunities the Board believes need to be pursued or are we on the right track?

Background Information provided: Summary of Planning's actions taken to date, being considered or currently exist to further affordable housing.

6. List of criteria and What Is Important from Board Discussions and Community Engagement

Q6: With the list and information provided with these materials, the Board has received copies and or summaries of all comments provided and will be incorporated in the final draft of the Plan. Are there any

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

other major areas of emphasis or criteria the Board would like considered for addressing affordable housing in the County?

Background Information provided: A summary of key points and criteria to be incorporated in the Plan and for considering affordable housing development projects.

1. What is the Affordable Housing GAP in Orange County and Special Needs?

Definition Of Affordable Housing

Housing is a basic human need. According to the US Department of Housing and Urban Development (HUD), affordable housing is housing that costs its occupant (owner or renter) no more than 30% of their gross monthly household income. When calculating housing costs you should include not only rent or mortgage payments, but also utility costs, and when applicable, real estate taxes, property insurance, mobile home park and/or lot rental fees, homeowner association fees, and/or condominium fees.

There are different factors that are assessed when looking across the spectrum of affordable housing needs:

- Income and Poverty
- Rental and Owner Occupied Housing Stock and Housing Costs
- Cost Burden
- Housing for Special Needs, Persons with Disabilities, Seniors, Homeless, etc.
- Other Housing Problems

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

The extremely low income and very low-income residents of Orange County, which include seniors, especially those on fixed incomes, the homeless and persons at-risk of homelessness, as well as persons with disabilities, are the most adversely affected by the high cost of housing and lack of affordable housing in Orange County

Income and Poverty

Median Household Income (MHI) has increased substantially almost three times (at 32%) more than the percentage increase of population (11%) in Orange County

There has been an influx of higher income earning persons to the area. As a result, the new construction housing, or housing with recent upgrades is primarily benefiting this demographic, and the low to moderate income group is being shut out of the housing market, and decreasing the number of housing opportunities and increasing the need.

Despite the increase in MHI, a notable portion of residents have low to moderate incomes (2010 U.S Census)

39.74% of all Orange County residents have low to moderate income

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

About 16.9% of the county is living under the poverty level

14.5 % of Families with related children under 18 are living under the poverty level

35.2% of Female headed households with children under 18 are living under the poverty level

9.9% of all individuals on limited incomes receive some sort of public assistance, social security, and supplemental social security

The County's poverty statistics for families with children are significant, particularly for single mothers.

Families with a householder who is White - **6.1%** are living under the poverty level

Families with a householder who is Black or African American – **20.6%** are living under the poverty level

According to the 2007-2011 American Community Survey (ACS), there are 55,315 housing units in Orange County, and 91.9% of them are occupied, leaving a vacancy rate of 8.1%

Most of the vacant units are located in the northwestern and southeastern portions of the County, as well as the central portion of Chapel Hill.

Most of the vacant units also **require some level of rehabilitation**

Rental & Owner Occupied Housing Stock & Housing Costs

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

28.6% of all owner-occupied households with a mortgage are paying over 30% of their monthly income on housing, which indicates that a moderate percentage of homeowners are living in housing that is not considered affordable.

In 2011 the median mortgage expense for Orange County was **\$1,831**

As of 2014, the median mortgage expense was about **\$1,767**, a slight decrease

The median monthly rent in Orange County increased by 22.81% between 2000 and 2011 from **\$684 to \$840** and 2014 to **\$938**

Cost Burden – The Gap

7,629 households were cost burdened by 30% to 50% and

8,751 households were cost burdened by greater than 50%

The 1000 Units proposed by the Plan would address approximately 11% to 13% of the households cost burdened

2007-2011 American Community Survey (ACS) DATA

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

Persons with Disabilities

According to the 2007-2011 American Community Survey (ACS) data showed that 8.4% of the total populations in Orange County, over the age of 5 are disabled.

With **8.4%** of the total population over the age of five living with disabilities, this is a clear indicator for the need for housing for this population.

Individuals with disabilities are mainly low-and moderate-income, and do not have the resources to always ensure their housing is accessible and/or affordable.

Presently, there are 84 accessible housing units for persons with disabilities in LIHTC properties.

As of December 2014 it is estimated that there are a total of 16 individuals diagnosed with HIV/AIDS in Orange County.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

There is a range of disabilities that contribute to self-care and independent living difficulties. Thus having an affordable and supportive housing option for this population is critical.

Of persons with disabilities between ages of five and seventeen (1,079) most have cognitive difficulties which contributes to difficulties with self-care.

Of persons with disabilities between the ages 18 to 64 (6,326), their disabilities vary greatly and contribute to difficulties with independent living.

Of the population age 65 and older (12,749), about 30% of them (3,775) have a disability that may include hearing, cognitive, ambulatory and vision among other limiting difficulties.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

Housing Needs for Older Adults/Seniors

There is an ever increasing need for housing options for seniors in Orange County

The county serves 22,123 residents who are over the age 60.

Currently, the county only has 1,534 designated senior-specific housing units across the continuum of care; 200 assisted units out of a total of 20,234 renter-occupied units which is 1% of the renter-occupied units.

For each type of current housing option for seniors there are **few to NO vacancies**, and waiting lists spanning one to several years.

On average, about **two** apartments in HUD funded senior housing become newly available each year.

Additionally the currently senior specific housing unit costs are out of reach for many low- and moderate-income older adults in Orange County.

Currently there are 3,277 single person households with adults aged 65 and older – this is 6.4% of all the single person households in the county.

As the 6.4% of older adult, single person households age in place, there are special accommodations and special needs that will be necessary to sustain this portion of the County's population.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

The lack of continuous and coherent housing supportive services is a growing problem for those who are extremely low-income and at imminent risk of becoming unsheltered or living in shelters.

Some specific needs of these at-risk households are: food, clothing, transportation, health care, medical treatment, case management, counseling and job training with housing. The following statistics indicate that there is a need for supportive housing in the County.

Point in Time Count - January 2016

65 sheltered

15 unsheltered

80 total homeless – living in shelters, transitional housing, and places not meant for human habitation

10 Adults & Children in families

70 Adults without children

7 Veterans

16 Chronically Homeless

14 Adults with serious mental illness

4 Adults with substance use disorder

1 Adult with HIV/Aids

11 Victims of Domestic Violence

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

Other Housing Problems

Throughout Orange County, the number of renter households experience one of the four housing problems is greater than the number of owner-occupied households experiencing a housing problem

Four types of Housing Problems

Cost burdened by more than 30%

Experiencing overcrowding

Incomplete kitchen facilities

Incomplete plumbing facilities

47.1% of 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

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

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.

Other Housing Problems

Another housing problem that impacts Orange County's population and overall need is the issue of disproportionate need.

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 statistics are examples of this in Orange County, with issues regarding things like homeownership, access to credit and financing among other issues.

The number of White, non-Hispanic middle-income applicants significantly **outnumbers** the number of minority applicants.

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 America" households, **52.85%** are homeowners and **57.15%** are renters.

According to the Home Mortgage Disclosure Act (HMDA) data, **three quarters of the total number of applications** are by Whites, 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**.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

According to the 2007-2011 American Community Survey (ACS) data showed that 8.4% of the total populations in Orange County, over the age of 5 are disabled.

Place	% of population over 5 living with disabilities	Total Population
Orange County	8.4%	140,352

Individuals with disabilities are mainly low-and moderate income, and do not have the resources to ensure that their housing is accessible and/or affordable.

There is a range of disabilities that contribute to self-care and independent living difficulties. This requires having an affordable and supportive housing option for this population.

Place	Ages 5-17yrs	Ages 18-64yrs	Ages 65+
Orange County	1,079 - Cognitive Disabilities	6,326 – with disabilities that contribute to difficulties with independent living	30% or 3,775 have some type of limiting disability (cognitive, ambulatory, and/or vision)

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

SUPPORTIVE SERVICE NEEDS IN ORANGE COUNTY

Special Needs – Seniors/Older Adults, Persons with Disabilities, Homeless, Victims of Domestic Violence

What Is Supportive Housing?

Supported housing and supportive housing are two widely used terms, and for some, the two terms have different meanings, but here is meant interchangeably. The more important distinction is between these housing models – supported and supportive housing – and facility-based housing models that have historically been available to persons with disabilities.

Under the facility-based model, persons with disabilities are “placed” in a facility-based setting depending on a diagnosis or assessment by professionals of the need for supervision or assistance. Residents give up most of their income in exchange for room, board, and provided services. The cost of resident “care” is most likely paid by a public entity based on a daily or monthly rate. With the facility-based model, people are often clustered by diagnosis in large congregate settings.

Supportive housing has evolved as a recognized housing model preferred by persons with disabilities. With this model, individuals choose where they live; although, in reality, there are still too few choices. The housing is decent, safe, accessible, and affordable to their income. The occupant has the rights and responsibilities of tenancy or ownership, i.e., they can live there as long as they fulfill their obligations as a tenant or homeowner. Services and supports – “unbundled” from where the person lives – are person-centered, flexible and designed to meet the needs of the individual. The services and supports an individual may need to be successful in the community will differ according to their particular situation, but the need for accessible and affordable housing units in the community is common across populations.

What is the housing and supportive service needs of the population with special needs in Orange County and how were these needs determined?

Based on resident surveys, stakeholder interviews, roundtable discussions, data analysis, and public meetings, the following needs were estimated for the non-homeless special needs population that totaled 955 units:

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

- Elderly Persons/Older Adults - 450 housing units
- Frail Persons - 200 housing units
- Persons with Mental, Physical and Developmental Disabilities - 150 housing units
- Persons with HIV/AIDS and their families - 5 housing units
- Victims of Domestic Violence, Dating Violence, Sexual Assault, and Stalking - 150 housing units

According to the Orange County Master Aging Plan, "Orange County's older adult population is expected to increase dramatically over the next 20 years. Many seniors will struggle to stay in homes that are not designed to accommodate their changing needs. Seniors must anticipate and adapt to the changes associated with aging.

As part of the Master Aging Plan, Orange County aims to offer an array of housing options that reflects the diverse preferences and abilities our older adult population portrays. Orange County needs to conceptualize a continuum of housing types to accommodate rapid growth in its senior population and then, invest in development of preferred housing models."

With regard to Special needs facilities and services, "The following needs and objectives are established in the County's Five Year Consolidated Plan:

- Elderly - rehabilitation of existing owner-occupied housing units, and construction of new affordable and accessible apartments
- Frail Elderly - construction of new affordable and accessible apartments with supportive services
- Persons with Disabilities - rehabilitation of existing housing units for accessible improvements, reasonable accommodations to rental housing units, and supportive employment opportunities
- Alcohol and Other Drug Addictions - supportive services to end addictions, and training to re-enter the work force
- Public Housing Residents - housing downpayment assistance, job training and job opportunities, and housing counseling for home ownership, and assistance in finding affordable housing
- Victims of Domestic Violence - additional temporary shelters, supportive services and training programs, and permanent supportive housing options"

Under the Continuum of Care, there is information about the Coordinated Re-entry system which identifies an individuals' needs and aligns those needs with the appropriate service provider which could include supportive housing.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

The needs for these various groups of the Special Needs Population are estimates, based on HUD data, U.S. Census Data, ACS data and interviews with housing providers and social service agencies. Specific statistics are not available for all groups equally, so “best estimates” are provided. While many supportive service providers for the special needs population are located in Orange County, their service area and clients are in the whole region.

County Bonds for Affordable Housing: 1997 and 2001

The largest single source of funding for affordable housing development in Orange County has been through the Orange County Bond Program fifteen years ago. Orange County has had two bond issuances for Affordable Housing; one in 1997 and the other in 2001 resulting in 395 units being completed.

In November 1997, Orange County voters approved a \$1.8 million dollar housing bond issue; the first housing bond issue approved in the County. Funds were to be used for affordable housing initiatives in three areas: land acquisition, housing development, and homeownership programs; 177 units were completed.

On April 7, 1998, the Board of County Commissioners appointed a Housing Bond Policy Task Force with membership from a representative of the seventeen local non-profit housing organizations and associations. The Task Force developed a proposed Housing Bond Policy which was approved by the Board on December 15, 1998. After the policy was completed, Request for Proposals was solicited from existing county housing non-profit agencies.

Orange County voters approved the second Affordable Housing Bond issue in November 2001 for affordable housing in the amount of \$4 million dollars. The Affordable Housing Advisory Board (AHAB) began review of the existing bond policy in preparation of identifying projects to be financed from the 2001 bonds. AHAB's review yielded further recommendations for modifications and the revised bond policy was presented to the Board of County Commissioners (BOCC) and approved on October 15, 2002.

On November 4, 2002, the County issued a Request for Proposals soliciting applications for the first round of bond funding with total available funds of \$1,040,000. Funding pools were established in the following categories:

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

Homeownership; Special Needs–Ownership or Rentals; and Non-Special Needs Rental and Cooperative Housing; approximately 218 units were completed.

What are SROs?

Among questions from the Board presentation from the last work session on different types of affordable housing and cost of development, a question was raised about Single Room Occupancy. SROs are typically developed as an affordable housing option for persons with low income, at risk of homelessness or homeless.

Definition of SRO (Single Room Occupancy)

SRO housing contains units for occupancy by one person with usually some shared common living space and or restroom and or bath facilities. Individual SRO units may contain food preparation areas, bathrooms, or both.

Example of a SRO, City of Chesapeake, Virginia

- The City of Chesapeake is a part of a regional effort to end homelessness. One of the strategies the City is using to meet this goal is through the development of Supportive Room Occupancy (SRO) apartments.
- The SRO will consist of sixty studio apartments for homeless single adults without children. Virginia Supportive Housing (VSH) is the regional developer for the permanent supportive housing developments in South Hampton Roads.

Example of Innovative SRO Programs - Virginia Supportive Housing (VSH)

- ***With its strong record of success – 95% of clients not returning to homelessness – VSH has helped communities save millions of dollars in medical services, shelters and feeding programs, judicial services and other public resources.***
- April 18, 2016 (Richmond, Va.)—Virginia Supportive Housing (VSH) received a competitive grant to study
- the feasibility of using an innovative funding method, Pay for Success, to serve vulnerable individuals who

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

have histories of homelessness and high levels of need. The Richmond-based non-profit organization is one of four grant recipients nationwide.

- Pay for Success financing and contracting is a promising model for governments to partner with the private sector to fund evidence-based solutions. It leverages philanthropic and private dollars to fund services up front, and governments or other entities provide reimbursements to the funders after initiatives generate verified results. This strategy has gained strong bi-partisan support in Congress for its ability to increase return on taxpayer dollars while improving the quality of services provided in communities.
- “Virginia Supportive Housing has proven that providing affordable housing and supportive services to individuals who experience chronic homelessness is more cost-effective than having them consume a wide array of public services while they are experiencing homelessness.”
- In fact, one individual experiencing homelessness can cost a community \$40,000 a year or more by consuming public services that are not delivered in a coordinated manner, whereas supportive housing costs about \$15,000.
- VSH’s delivery of supportive housing is proven to be very effective: 95% of those it serves do not return to homelessness.
- “Pay for Success can boost our efforts to scale these evidence-based practices through collaborations between public, private and nonprofit sectors.” “The financial and technical support from the grant will help develop a more outcomes-focused model to pay for the services provided in the Richmond area while saving public dollars.”
- Specific Focus on Recidivism
In Richmond, a small group of individuals play a significant role in the escalating costs for correctional services and other emergency systems. These frequent users have complex needs and ricochet between incarceration, hospitalization, detoxification services and homelessness.
- VSH is currently serving individuals who are being released from the Richmond Justice Center, helping them to secure housing and providing supportive services in an effort to reduce recidivism. The grant will help to explore an expansion of serving a targeted population of individuals who have had contact with jails and hospitals more than four times over five years with at least one stay in a jail or hospital in the last year.
- VSH and its partners will have up to 18 months to develop and determine the feasibility of a Pay for Success model that would enable it to scale and fund services that help to reduce recidivism and hospital usage, thus reducing public costs.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

- Collaborative partners examining the feasibility of Pay for Success with VSH include Homeward, the Richmond Justice Center, Richmond FUSE Initiative, Greater Richmond Continuum of Care, the Virginia Department of Corrections, the Virginia Pay for Success Lab of the University of Virginia's Frank Batten School of Leadership and Public Policy, VCU Health and Bon Secours Richmond Health System.
- The competitive grant, valued at \$100,000 in services and resources, includes technical expertise from the Center for Health Care Strategies, which will provide expertise in Medicaid and other public financing sources for serving vulnerable populations, and Third Sector Capital Partners, which will offer guidance on building financial modeling capacity and designing and structuring procurement processes.
- A portion of the funding awarded by CSH is from the Corporation for National and Community Service's Social Innovation Fund.

About Virginia Supportive Housing

VSH is Virginia's first and leading supportive housing agency, serving more than 1,500 individuals annually in Richmond, Hampton Roads and Charlottesville. Founded in 1988 and headquartered in Richmond, the agency developed and manages 543 units of supportive housing in 16 multi-family properties. VSH also partners with other landlords and provides mobile case management to residents living in those apartments. The non-profit organization administers the largest Supportive Services for Veteran Families program in Virginia, playing a key role in preventing and ending veteran homelessness.

HUD SRO Program

HUD enters into an agreement with Public Housing Agencies (PHAs) in connection with the rehabilitation of residential properties. When rehabilitation of the SRO is completed, a PHA makes Section 8 rental assistance payments to participating owners (i.e., landlords) on behalf of homeless individuals who rent the rehabilitated dwellings. The rental assistance payments cover the difference between a portion of the tenant's income (normally 30%) and the unit's rent.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

2. Land Banking

What is Land Banking?

Land banking is the process or policy by which local governments acquire/purchase properties and convert them to productive use or hold them for long-term strategic public purposes. Land banks are public authorities or special purpose not-for-profit corporations that specialize in land banking activities. Primary barriers to reuse vacant and abandoned property by the open market are tax liens and foreclosure processes.

Land Banks as Depositories

A land bank can acquire properties and re-convey them to qualified transferees for reuse and redevelopment. For a Land Bank Depository Program the goals are fourfold:

- a. Permit advance acquisition of potential development sites in anticipation of rapidly rising land prices;
- b. Facilitate pre-development planning, financing and structuring;
- c. Minimize or eliminate violations of housing and building codes and public nuisances on properties to be developed for affordable housing;
- d. Hold parcels of land for future strategic governmental purposes such as affordable housing and open spaces and greenways

When a community lacks existing development or redevelopment capacity, it may indeed become possible and appropriate for a land bank to serve a catalytic role in stimulating the redevelopment of a specific tract of land. Precisely because of its ability to acquire and hold vacant land, the land bank possesses a key potential asset that it can contribute to a redevelopment joint venture or limited partnership. To the extent that the land bank possesses broad authority to borrow funds and secure its own interests by taking back subordinate construction financing or long term debt or equity positions, it possesses a strong set of partnership tools.

Land Bank Example: Northside Land Bank, Chapel Hill

The Northside Neighborhood Initiative (NNI) is a partnership among UNC-Chapel Hill, Self-Help, the Jackson Center, and the Town of Chapel Hill that pursues a shared vision for the historic Northside Neighborhood: a family-friendly, multi-generational community that balances the needs of long-term residents, new owners, renters

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

and students.

Durham-based nonprofit community developer Self-Help is utilizing a \$3 million no-interest loan from UNC-Chapel Hill to lead the acquisition and resale of properties in the Northside that would be used for housing opportunities, for home ownership and rental, consistent with the community's goals and vision. Self-Help's work is done with direct support from the grassroots nonprofit Jackson Center, and in close collaboration with neighborhood residents, non-profit housing providers, and other partners. Implementation of the Northside Neighborhood Initiative is facilitated through a contract between Self-Help and the Town of Chapel Hill.

Self Help uses the phrase "land bank" to mean a mechanism by which property can be strategically acquired, assembled, and converted to serve a community purpose. Self-Help formed the Northside land bank to gain control of key properties that can help support neighborhood goals. Self-Help's goal is to acquire properties from owners looking to sell, and make these properties available for purchase by homeowners, non-profit housing providers, and other developers responsive to neighborhood interests. It advances ongoing efforts of non-profit organizations like EmPOWERment, Inc., Habitat for Humanity, and the Community Home Trust, that have worked together over the years to promote and to build affordable housing and to conserve the unique strengths of the neighborhood. An individual buyer or organization can be added to the contact list maintained by the Jackson Center for when homes become available.

Land Trust

Land Trusts and Land Banks are different. Land trust is a private non-profit entity and land bank is a government (agency) authority.

Land trust is primary focus is to protect natural resources and permits very limited, if any, development activities; a land bank will acquire and manage properties and then transfer them to third parties for whatever priority uses are locally determined, including affordable housing, mixed-use development or green spaces. A land trust anticipates holding legal title to the property indefinitely; a land bank holds legal title only until an eligible transferee can be identified. A land trust targets for acquisition specific tracts of land that it acquires by purchase or donation; a land bank acquires abandoned land wherever it happens to be located. A land trust possesses only such powers as are available under federal and state law to not-for-profit corporations; a land bank possesses a broad range of governmental powers authorized by state statute and intergovernmental agreements. A land trust is generally dependent on philanthropic contributions for its operating budget; a land bank may possess a range

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

of internal financing sources derived from the source of its inventory and tax policies.

Example of Land Trust, Community Home Trust (CHT)

CHT is a Land Trust and currently has 246 homeownership units in Carrboro and Chapel Hill.

3. Mobile Homes in the County

a. Mobile Home Map and Statistics

- Maps
 - Mobile Home Parks
 - Mobile Homes outside of Mobile Home Park

• Total number of mobile homes in Orange County	4236
- <i>Number of Mobile Home parks</i>	<i>100</i>
- <i>Number of Mobile Home's in parks</i>	<i>2297</i>
- <i>Number of Mobile Home's outside of parks in rural area</i>	<i>1959</i>
- <i>Vacancies (in Mobile Home Parks)</i>	<u><i>250</i></u>

b. Mobile Home Support Strategies

There are four general categories in support of and/or creation of Mobile Home Park inventory. Each with sub-options/alternatives for action and involvement by the county, and its municipal and non-profit partners and with the possibility of private sector participation.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

The following scenarios illustrate some of the option pathways to achieve support of Mobile Home Parks and individual Mobile Home's. These strategies include:

- Sustaining existing inventory
- Reducing vacancies where possible (see lease options)
- Improving conditions within Mobile Home Park's
- Redeveloping where available unit potential may exist or be created
- Creating new inventory by Mobile Home Park development

Admittedly, each pathway may have strengths, weaknesses, opportunities and 'obstacles', however, a comprehensive track can ameliorate potential issues. The basic quantitative challenges often involve lack of infrastructure (including but not limited to public water and sewer) and zoning constraints based on 'old' regulations and techniques. The following 'action plan scenarios' offer some available solutions.

ACTION PLAN SCENARIOS

- 1 Land
 - a) Existing Mobile Home Parks
 - a1 Support existing Mobile Home Parks and mobile individual mobile homes non-park settings.
 - a2 Lease existing vacant Mobile Home Park Spaces
 - b) Redevelopment (AKA Brownfield)

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

- c) New Undeveloped Lands (AKA Greenfield)
 - c1 Land Banking
 - c2 Development (see below)

2 Ownership/Leasing

- a) Purchase fee simple
 - a1 Own long term
 - a2 Sell later to non-profit
- b) Create an ownership partnership
- c) Create a developers agreement
- d) Leasing Models/Tenant-Owner

3 Community Engagement (Depending on redevelopment or development)

- a) Existing Residents
- b) Neighborhood

4 Planning and Zoning (AKA Entitlements)

- a) Present zoning and associated density and regulations (i.e. base zoning)
(Often 'grandfathers' in old site plan before zoning which can be limiting)
- b) Process a rezoning (allows an update to new methods)
 - b1 Conventional (Specifically outlined density and regulations of the UDO; e.g. R-8 High intensity Residential District page 3-16). Future site plan conforms to zoning and all other aspects of UDO and is reviewed by staff.
 - b2 Mobile Home Park-Conditional zoning (MHP-CZ). This would provide an opportunity for a Mobile Home Park owner to update their Mobile Home Park to new UDO Standards.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

b3 This is used in a non-Mobile Home Park Situation.

Master Planned Development Conditional Zoning (MPD-CZ) (unique master plan, density and regulations created by the applicant (county in this case)). This would be only applicable to a specific parcel and the rezoning proposal and general parameters of the development would be reviewed by the Planning Board and Board of County Commissioners. This rezoning type could adopt different lot sizes, setbacks for different sections that could promote a mixed income house/unit value development of a variety of housing types (i.e. single family, single family attached, multifamily). The determinations of sale vs. rental would be outside of zoning controls and could be arranged by separate agreements.

b4 For tiny homes which are usually classified as recreational vehicles (RV), the current planning division is developing new RV-Conditional zoning standards for public and BOCC review early next year.

5 Utilities (Water, Sewer and fire hydrants)

a) Presently located adjacent to the site

- a1 County designs and funds installation
- a2 County participates in funding utilities
- a3 County does not participate in funding

b) Partially present on site

- b1 Water only potable
 - Community Well _____
 - Public System _____
 - Private Well _____

b2 Fire hydrants

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

Yes Name of Utility
 No Fire pond/water points, other

b3 Presently no sewer systems

b-3.1 Individual septic install on same 'lot'

b-3.2 Individual septic install offsite in community septic field

b-3.3 Advanced technology system (e.g. BUSSE system)

b-3.4 Install and extend public sewer system

b4 Roads, drainage and stormwater

6 Mobile Home (HUD Standards), Building Construction and other

a) Mobile home

b) Conventional 'Stick Built' Single Family Code (Architect)

b1 By non-profit

b2 By a RFQ builder

c) Modular Home meeting same 'Stick Built' single family code selected by county through RFQ process.
 Could include a variety of house styles and sizes

d) Duplex

e) Townhome (Attached single family)

g) Multifamily

f) Tiny Homes; Future RV UDO regulations

7 Development Fees

a) Planning Fees

b) Building Fees

c) School Fees

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

- d) Park Fees
- e) Engineering/Stormwater Fees
- f) Other Fees

8 Financing

- a) Private Sector
- b) Public Sector

9 Administration of Project

- a) Project Manager
- b) Income house selection/placement
- c) Maintenance

10. Employing existing county (or town) lands for placement of 'donated' structures.

Mobile Homes in Orange County

There are approximately 4,089 mobile homes in Orange County according to the 2010-2014 American Community

Place	Sound Condition	%	In need of Minor Repairs	%	In need of Major Repairs	%	Economically Infeasible to Repair	%	Total
Orange County	378	18.74%	990	49.08%	580	28.76%	69	3.42%	4,089

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

Vacancies in Mobile Home Parks

Place	Average Vacancies	Maximum Amt. Vacancies	Total Vacancies (January 2016)
Orange County	4.6	28	250

A total of **55** mobile home parks (out of 100) had vacant spaces totaling **250** at the time of the survey (Jan 2016). Each park averaged **4.6** spaces with the largest number of vacancies at one park being **28 spaces** and with room available to expand.

The cost and or lack of financing available, along with cost of insurance makes purchasing manufactured homes more difficult for low income owner housing; as a result mobile homes have become more of a rental option.

The average sales price for manufactured housing has continued to increase:

Smaller Unit in 2010: **\$39,500**

Smaller Unit in 2014: **\$45,000**

Larger Unit in 2010: **\$65,300**

Larger Unit in 2014: **\$82,000**

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

Rental and Lease to Own Models: From Homelessness to Homeownership in Nine Months. It's Possible

Following are examples of innovative and established programs utilizing manufactured housing as a key source of affordable housing. The two model described below is from a national organization, CFED who supports an Innovations in Manufactured Homes (I'M HOME) and annual conference.

Family Promise, New Jersey

- Family Promise is a 30-year old national network of affiliates based in New Jersey that aim to help homeless and low-income families through a comprehensive approach of direct services, education, and other tools.
- Through its network of 200 affiliates, the organization serves 50,000 people each year.
- This model is considered an emerging example of how to think about core work in affordable housing in a different way, one that recognizes the value of manufactured homes while addressing the comprehensive range of needs facing low-income families.
- Family Promise approaches homelessness in a number of ways:
 - Local affiliates use congregations to provide immediate shelter and other services.
 - Local groups also provide financial education and participate in public policy work, focusing on key issues such as funding the National Housing Trust Fund and expanding the definition of homelessness.

Partners in Housing initiative, Grand Rapids Michigan

- Partners in Housing initiative is another innovative program launched by Family Promise of Grand Rapids, Michigan, about six years ago.
- The program identifies vacant manufactured homes in land-lease communities in the region.
- Staffs in Grand Rapids do their due diligence to determine if the home can be repaired or improved in a cost-effective way and if the manufactured home community is suitable for client families.
- Declining parks or those with high incidence of crime are excluded.
- Family Promise negotiates a price with the community owner (or the homeowner) and then, post-purchase, organizes local volunteers to paint, make minor repairs, landscape and otherwise make the home move-in ready for a new family.
- The total cost per unit is less than \$8,000, all of which is raised locally. The cost to the family, from the beginning, is marginal. They pay only the lot rent (about \$450 per month) and utilities. They pay no rent or other expenses for the actual home. For comparison, the Fair Market Rent for a three-bedroom home in the region is \$1,091, which requires an hourly

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

wage of about \$19—or more than \$39,000 annually—to afford it, an amount that is out of reach for most homeless and near-homeless families.

- Eventually, in as few as nine months, Family Promise transfers the title of the home to the family at no cost. In other words, families can go from homelessness to homeownership in less than a year. “The program is said to not only end homelessness for families but it actually helps them move out of poverty.”
- This Program has been found to benefit the families and prepare them financially for their future in a few ways. Like I'M HOME, **Partners in Housing recognizes the intrinsic value of manufactured and mobile homes, and so the initial cost, offset by volunteer hours, is low. Most importantly, the program requires investment from the families.**
- A family's sweat equity comes in the form of participation in financial capability education programs. Families participate in financial education and are connected with social services.
- Family Promise provides wraparound services to target key goals, including employment (along with daycare), education (for both parents and children), transportation, health, budgeting assistance, and more.
- **These programs aim to ready the family for homeownership, which has already become a reality for 67 families in the area. While most of the families are still living in the manufactured homes, 15 or so have moved to other housing options, including other forms of homeownership.**
- Family Promise of Grand Rapids has purchased homes in 14 manufactured housing communities. There is a real benefit to the community owner, as well, as the purchases fill vacancies, improve cash flow, and provide a better-looking property. The community owner also has access to local nonprofit support if a family misses a payment or faces other challenges in their transition.
- Just as important, however, is that Family Promise's involvement mitigates potential problems that the families may face with a community owner. Too often, owners of manufactured homes and other community residents feel isolated from community amenities and services. Having outside support can be a huge help.
- This program not only ends homelessness for families but it actually helps them move out of poverty. This changes the future for the children and affords them a real chance at a healthy future, which in turn changes the future for our entire community.
- **Family Promise affiliates in Florida and Minnesota have started to use manufactured and mobile homes to meet their local housing needs.**
- CFED is exploring how it can help Family Promise expand this program, making it sustainable, adaptable to local needs and conditions, and better able to serve a broader audience.

Source:
CFED, 05/10/2016

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

4. Leveraging Existing County And/or Other Local Government Owned Land

Overview

Proposed strategy 1.1 within the proposed 5-year plan - "Identify publicly owned land or property located within the County that may be used to address affordable housing needs identified in the Plan" is moving forward with several actions and reasonably attainable outcomes:

1) Small parcel uses - accepting existing housing units needing displacement. The County is currently working with other municipalities to structure a process for sharing information and resources to positively affect homes facing deconstruction that could remain within the affordable housing inventory if moved to a suitable home site. As an example, the County is working with Hillsborough in its efforts to move an unoccupied County owned home facing deconstruction to make room for the Sportsplex Field House. This home is being planned for the move.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

2) Small parcel uses - Making available parcels for small housing development through an RFP process.

3) Large parcel uses - Making available parcels for a variety of affordable housing development through an RFP process.

These parcels may include County provided master planning and use guidance as part of the RFP process.

4) Continue collaborating with County municipalities in each jurisdiction's inventory of publicly owned land and housing units.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

5. Planning Initiatives to Further Affordable Housing

Current Regulations Supporting Affordable Housing Opportunities

Providing housing opportunities for residents in a range of income levels is essential for a well-balanced community. Local government land use controls that limit the supply of housing can be the primary reason for the lack of affordable housing. The urban services boundary implemented in Orange County regulates the location of water and sewer infrastructure and the supply of available land for development. This can limit the supply of developable land; create a higher demand and increase housing prices in the local real estate market.

The Orange County Unified Development Ordinance (UDO) contains standards and regulations allowing for and supporting affordable housing opportunities for Orange County residents as identified below:

- The UDO does not set minimum square footage requirements for residential structures, which assists in reducing overall costs. Minimum room square footages and dimensions are consistent with the North Carolina State Building Code.
- Orange County strives to allow for a variety of housing types for residents in the general use zoning districts, economic development zoning districts, and conditional zoning districts in Orange County. Many of these residential uses are permitted by right which reduces the amount of red tape and shortens the review process.
- Apartments and other multifamily residential uses including townhomes and condominiums are permitted in Orange County. These uses are permitted by right in several residential zoning districts, general commercial zoning districts, economic development districts, and conditional zoning districts.
- Two family dwellings (also known as a duplex) are permitted by right in several residential zoning districts, general commercial zoning districts, economic development districts, and conditional zoning districts.
- Manufactured housing including mobile homes and modular homes are permitted by right on individual lots in several residential zoning districts, general commercial zoning districts, economic development districts, and conditional zoning districts.
- Mobile home parks are permitted in the county with the creation of a Mobile Home Park – Conditional Zoning District. The purpose of the Mobile Home Park - Conditional Zoning (MHP-CZ) District is to provide for the development of properly located and planned facilities for mobile home parks.
- Group care facilities are currently permitted in the county in nine residential zoning districts, six general commercial zoning districts, and one conditional zoning district with a Class B Special Use Permit.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

- Rehabilitative care facilities are permitted by right in the general zoning districts, economic development districts, and conditional zoning districts.
- Rooming houses (also known as boarding houses) are permitted by right in four residential zoning districts and one general commercial district.
- Efficiency apartments (also known as accessory dwelling units) up to 800 square feet are permitted as an accessory use to a single family dwelling unit in several residential zoning districts, general commercial zoning districts, economic development districts, and conditional zoning districts.
- A total of 100 mobile homes parks are identified as operational in Orange County, majority of which do not meet zoning requirements adopted in 2011. Many were established prior to zoning in the various townships and no mobile home parks were formally adopted since the early 1990's. However, these parks are permitted to remain operational based on Article 8, Nonconformities, and provide affordable housing opportunities to residents.
- Recently approved standards allow for up to five persons who are not related to reside together in a residential dwelling unit which could promote co-housing.
- Temporary Custodial Care Units provide an affordable option for a caregiver to provide short or long term care for a mentally or physically impaired person.

Future Amendments

- Revision to Existing Subdivision Standards – revisions to existing minimum lot and offsite septic standards to allow for smaller lot sizes and accommodate micro housing, pocket neighborhoods and cluster developments.
- Rural Master Plan Development Conditional Zoning District – Allow for flexible residential development in the rural areas of the County to develop with respect to minimum lot sizes and cluster options.
- Recreation Vehicles and Tiny Homes as Temporary Housing – Establish a new district allowing for recreational vehicles in the rural and tiny homes to be permitted within a mobile home park and be permitted as temporary housing for residents.
- Continuing to find 'zoning techniques' to promote private sector affordable housing and examining authority county was given in 1991 for density bonuses in consideration of new affordable housing related amendments recently proposed (September 2015) would potentially be misconstrued and overlap existing legislation and UDO rules. The affordable housing density bonuses/references have been deleted from Planning's new amendment and will be analyzed in working with the Department of Housing, Human Rights and Community Development and the county attorney's office to ensure Planning is within the bounds of legislation.

Orange County AFFORDABLE HOUSING STRATEGIC PLAN 2016 -2020

BOCC Work Session September 8, 2016

6. Criteria Important to the Board from Previous Discussions and from Community Engagement

- **Goal: Assistance for 1,000 Homes to Address Greatest Affordable Housing Needs in Our Community**
- **Highest Priority:** Affordable Rental Homes for Households with Lowest of Incomes and Homes For Persons With Special Needs; Then Workforce Housing and Homeownership for Moderate Income
- Range of Housing and Mixed Incomes in Diverse Neighborhoods (Not Concentrated)
- Energy/Environmentally Efficient
- Universal Design
- Leveraging
- Transit Oriented Development
- Consider Transportation and Housing Costs
- Private and other Public Investment (non-county)
- Intergovernmental Collaboration and Investment
- Inclusiveness and Diversity
- Creativity/Innovations in Access to Transportation/Community-wide (Eliminating Areas of Isolation)
- Access to Amenities (Services and Shopping including Grocery Stores/Food)
- Coordinating and Collaboration Among Other Related Initiatives For Stronger Community Outcomes (e.g., Anti-poverty, FSA, Aging and Homelessness Initiatives)
- Access to Educational and Employment Opportunities
- Learning from Past Efforts (Studies, Plans and Projects)
- Learning from New Initiatives, Strategies and Evaluating Different Housing Models
- Prepared for and or Creating Opportunities (Land Banking, strategic partnerships, etc.)
- Community Partnerships (including Nonprofit, Neighborhood and Faith Based Organizations Intergovernmental and Private Sector)

Attachment B

1

APPROVED 6/7/2016

MINUTES
BOARD OF COMMISSIONERS
Work Session
May 10, 2016
7:00 p.m.

The Orange County Board of Commissioners met in a work session on Tuesday, May 10, 2016 at 7:00 p.m. at the Southern Human Services Center, in Chapel Hill, N.C.

COUNTY COMMISSIONERS PRESENT: Chair McKee and Commissioners Mia Burroughs, Mark Dorosin, Barry Jacobs, Renee Price and Penny Rich

COUNTY COMMISSIONERS ABSENT: Bernadette Pelissier

COUNTY ATTORNEYS PRESENT: John Roberts

COUNTY STAFF PRESENT: County Manager Bonnie Hammersley, Deputy Manager Travis Myren and Clerk to the Board Donna Baker (All other staff members will be identified appropriately below)

Chair McKee called the meeting to order at 7:05 p.m.

A motion was made by Commissioner Burroughs, seconded by Commissioner Price to defer Item 3: **Orange County Property Naming Policy**, until a later date.

VOTE: UNANIMOUS

Chair McKee said Commissioner Pelissier will not be attending tonight.

1. Discussion of the Proposed Orange County FY 2016 - 2020 Affordable Housing Strategic Plan

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

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 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.

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.

Bonnie Hammersley said the Commissioners will find the following items at their places:

- Attachment 1- summary of community comments on the Plan
- PowerPoint presentation
- Recommendation sheet

Audrey Spencer Horsley reviewed the community comments handout at the Board's places, and these comments are incorporated by reference into these said minutes. A copy of these comments is located in permanent agenda file in the Clerk's office.

Chair McKee said transportation is a critical factor; but in the Chapel Hill-Carrboro area, Orange County is not responsible for transportation. He asked if there was discussion about coordinating transportation between the County and the Towns.

Audrey Spencer Horsley said the people with whom she met said that transportation in Chapel Hill is much more accessible, but the perception of Orange County is that there should be better transportation options and routes. She said the current lengthy County routes are especially stressful for seniors.

Commissioner Dorosin clarified that there is the Affordable Housing Master Plan (AHMP), followed by this series of community meetings, and now the Board has this recommendation/action sheet. He asked if the goal of tonight is to begin to try and narrow the plan and set priorities.

Commissioner Dorosin said the timelines of the budget and the bond must be considered. He said one goal would be to have a succinct summary of what the key actions are going to be, which can assist in talking about the bond.

Bonnie Hammersley said the structure for tonight was to talk about some of the recommendations. She said staff put the new recommendations first, followed by those that are underway, but need additional resources, and finally those that are already underway. She said this evening is an opportunity to receive BOCC feedback on as many recommendations as possible.

Commissioner Jacobs said this does not help him tonight. He said he had specific questions and concerns at the April meeting and was waiting for tonight's meeting to discuss those concerns.

Bonnie Hammersley said the new items are from the existing document.

Commissioner Jacobs said he does not see his concerns in the document before the Board tonight and assumes his concerns will not be addressed.

Bonnie Hammersley said the presentation of the recommendations will answer the questions previously asked by the Board.

Commissioner Jacobs asked if the process going forward can be clarified.

Bonnie Hammersley said her new recommendations are already in the plan, but are not currently being completed. She said direction is needed from the Board before moving forward.

Commissioner Jacobs said he brought up Mebane at the April meeting.

Bonnie Hammersley said staff reached out to Mebane and the University of North Carolina (UNC) to try and involve them in this process.

Commissioner Jacobs said he brought up using the Greene Tract for affordable housing in April, since there is an existing plan for housing. He asked if the Greene Tract is included in her recommendations.

Bonnie Hammersley said the Greene Tract is part of what is being considered going forward, and staff is asking for direction from the BOCC this evening. She said the Greene Tract is going to be included in the discussion tonight.

Bonnie Hammersley said there may not be answers to all of the Board of County Commissioners' questions, and staff may need greater clarification in order to answer them.

Commissioner Jacobs said it would have been helpful for Bonnie Hammersley to walk the Board through the recommendations document prior to this meeting.

Bonnie Hammersley said the document will be covered this evening during the continuation of the presentation. She said staff does not have all the information needed, but the conversation can begin this evening.

Commissioner Price asked Audrey Spencer Horsley clarifying questions about the comments sheet.

Commissioner Price asked if it is known when this plan will be finalized.

Audrey Spencer Horsley said staff hopes there will be a framework to come forth with priorities from the Board of County Commissioners, before the summer break.

Commissioner Price said once the plan is in place, will bond money be usable for projects already underway, or does the bond money have to go to new projects.

Bonnie Hammersley said most of the items "underway" are non-monetary, and a couple of these items have already been addressed in her recommended budget.

Bonnie Hammersley said she believed projects would have to be new in order to use bond money, but she would check on this and bring information back to the Board.

Commissioner Rich referred to the letter in the agenda packet from the Orange County Housing Coalition and asked if staff had responded to this letter.

Audrey Spencer Horsley said some of the items mentioned in the letter had been addressed in the plan, and implementation is being discussed further.

Commissioner Rich said there are certain things that have been around for 20 years, such as the Greene Tract, and to stop dancing around it by using the phrase "large tracts" and to specifically point out the Greene Tract.

Bonnie Hammersley said the new recommendations mentioned tonight were in the original AHSP, and do not yet include comments from the community. She said community and BOCC comments will be incorporated after this evening's discussion.

Commissioner Dorosin asked if this evening's PowerPoint includes comments from the community.

Audrey Spencer Horsley said not everything was included, but a majority of the substantive material was.

Travis Myren made the PowerPoint presentation below.

The Board decided at the beginning of this discussion to give items either the green, yellow or red light going forward; with green being a priority; yellow keeping it on the list; and red meaning do not worry about it right now.

AFFORDABLE HOUSING
STRATEGIC PLAN RECOMMENDATIONS
Board of Orange County Commissioners
May 10, 2016

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

New Recommendations

- ***New Recommendations – programs/policies do not currently exist***
- **AR1: Publicly Owned Small Parcel Development - GREEN**
 - Staff team to create project proposal for BOCC consideration
 - Solicit participation from other local governments

Commissioner Dorosin said it should be a priority to have a very collaborative program for affordable housing in the County. He said the focus should be a big pot of money for affordable housing from municipalities and the County, as there is a universal need. He said out of this should come a model for a multi-jurisdictional group of elected leaders, and the charge and structure of this proposed group should be determined.

Commissioner Jacobs asked if it is known when this group would start working, and said the vagueness of this process is frustrating him. He said when funds become available, all must be ready to act.

Commissioner Rich said the discussion is how to handle the parcels, and it is important to look at all aspects of this issue. She said there needs to be something standard in writing, and coordination is key to making this happen county-wide.

Bonnie Hammersley said staff perceives green items as a priority, yellow items are to be kept on the list, and red items are not to be worried about right now. She said staff needs to know how many resources the Board wants to put forth on these items.

Commissioner Dorosin said this intergovernmental group should start meeting immediately and be tasked with the prioritization of these needs, in order to support the bond education campaign.

- **AR2: Housing Authority as Property Manager - YELLOW**
 - Manager's Office to create policy paper outlining options for acquiring, holding, and managing affordable housing properties

Chair McKee expressed concerns about the Housing Authority (HA) providing property management.

Travis Myren said even with County oversight, an independent agency or non-profit would be hired to do the day-to-day property management. He said this could be an independent entity, and the HA could set policy associated with managing the properties.

John Roberts said the HA is a separate entity, which is incorporated by the State. He said the extent of the HA's involvement would be determined by the BOCC.

Commissioner Jacobs said if the Housing Authority is being discussed, the Housing Authority should be at the table for the discussion.

Commissioner Rich said she would like to have more information on this proposal, and it is not one of her priorities.

Audrey Spencer Horsley said more research can be completed. She said she has had initial discussions with the HA, but will need BOCC direction should the conversation get more in depth.

Commissioner Dorosin said this conversation comes out of the desire to have more rental housing and suggested getting more information, such as how it would work if the County owned the rentals with a non-profit providing management.

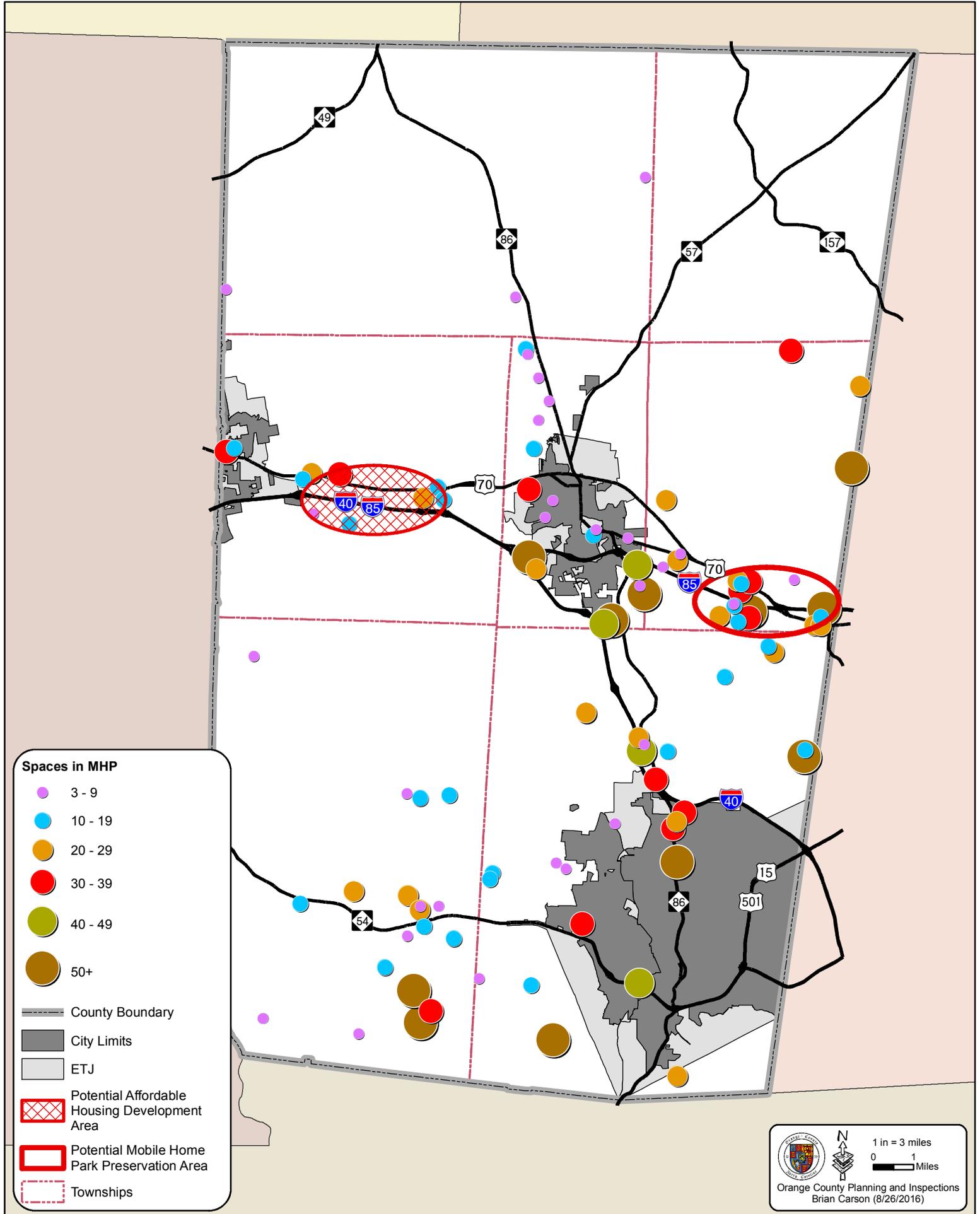
Commissioner Price asked if the proposal is that Orange County will actually own housing properties.

Travis Myren said it would depend. He said if the HA were to be used, it would be for County owned properties.

- **AR3: Development and Maintenance of Property – Selecting a Property Manager-ROLE THIS INTO THE ONE ABOVE - YELLOW**
 - Selecting an entity to maintain property will be determined by the model for property ownership and management

Orange County, NC																
Mobile Home Park Survey																
Number	Mobile Home Park Name	Street Address	City	State	Zip	Number of Sites	Mobile Homes in Sound Condition	Percentage	Mobile Homes in Need of Minor Repairs	Percentage	Mobile Homes in Need of Major Repairs	Percentage	Mobile Homes Economically Infeasible to Repair	Percentage	Number of Vacant Sites	Percentage of Vacant Sites
1	Airport Road	1575 Martin Luther King Jr Blvd	Chapel Hill	NC	27516	33	2	6.06%	22	66.67%	9	27.27%	0	0.00%	0	0.00%
2	Arbor Hill	4224 US 70 E	Durham	NC	27705	31	3	9.68%	14	45.16%	12	38.71%	0	0.00%	2	6.06%
3	Bailey's	4131 US 70 E	Durham	NC	27705	28	0	0.00%	2	7.14%	11	39.29%	4	14.29%	11	28.21%
4	Bennett's	518 West Hill Ave N	Hillsborough	NC	27278	27	0	0.00%	8	29.63%	16	59.26%	3	11.11%	2	6.90%
5	Bingham Woods	1419 Ford Rd	Chapel Hill	NC	27516	79	44	55.70%	22	27.85%	2	2.53%	0	0.00%	11	12.22%
6	Birchwood	5883 Wilkins Dr	Durham	NC	27705	85	18	21.18%	51	60.00%	10	11.76%	0	0.00%	6	6.59%
7	Boone AKA Steele's AKA Shelly's	119 Tareyton Trl	Mebane	NC	27302	17	4	23.53%	8	47.06%	1	5.88%	0	0.00%	3	15.00%
8	Bradley's	163 Louise Dr	Mebane	NC	27302	33	10	30.30%	20	60.61%	3	9.09%	0	0.00%	0	0.00%
9	Bradshaw's Mobile Acres	2314 White Cross Rd	Chapel Hill	NC	27516	24	0	0.00%	9	37.50%	2	8.33%	0	0.00%	13	35.14%
10	Braxton's AKA Brack's	1419 Crawford Dairy Rd	Chapel Hill	NC	27516	7	0	0.00%	2	28.57%	2	28.57%	1	14.29%	2	22.22%
11	Byrd's	1002 US 70A	Hillsborough	NC	27278	3	0	0.00%	1	33.33%	2	66.67%	0	0.00%	0	0.00%
12	Byrdsville	1801 Old NC 10	Hillsborough	NC	27278	59	0	0.00%	17	28.81%	30	50.85%	0	0.00%	12	16.90%
13	C & J	1801 Old NC 10	Hillsborough	NC	27278	11	0	0.00%	2	18.18%	3	27.27%	0	0.00%	6	35.29%
14	Calvander	8717 Old NC 86	Chapel Hill	NC	27516	8	1	12.50%	7	87.50%	0	0.00%	0	0.00%	0	0.00%
15	Carolanitic AKA Montwood AKA Rob-Bren	6809 St. Mary's Rd	Hillsborough	NC	27278	26	1	3.85%	8	30.77%	10	38.46%	0	0.00%	7	21.21%
16	Caroline	4931 Howe St	Durham	NC	27705	66	18	27.27%	43	65.15%	5	7.58%	0	0.00%	0	0.00%
17	Chapman's	7000 Lucky J. Ln	Hurdle Mills	NC	27541	6	1	16.67%	2	33.33%	3	50.00%	0	0.00%	0	0.00%
18	Continental p/o AKA Pendergraft	1435 Old Lystra Rd	Chapel Hill	NC	27517	22	0	0.00%	3	13.64%	11	50.00%	8	36.36%	0	0.00%
19	Country Haven AKA Wilson's	5012 West Ten Road	Efland	NC	27243	9	0	0.00%	0	0.00%	5	55.56%	3	33.33%	1	10.00%
20	Country Squire	6514 Schley Rd	Hillsborough	NC	27278	24	0	0.00%	2	8.33%	7	29.17%	3	12.50%	11	31.43%
21	Crawford's	1133 Crawford Mhp Rd	Chapel Hill	NC	27516	15	0	0.00%	11	73.33%	2	13.33%	0	0.00%	2	11.76%
22	Crestwood (East)	109 Crestwood Cir	Chapel Hill	NC	27516	12	6	50.00%	1	8.33%	4	33.33%	0	0.00%	1	7.69%
23	Crestwood (West)	213 Crestwood Cir	Chapel Hill	NC	27516	13	2	15.38%	4	30.77%	6	46.15%	0	0.00%	0	0.00%
24	Dairyland	7153 Maple Knl	Hillsborough	NC	27278	12	1	8.33%	4	33.33%	5	41.67%	0	0.00%	2	14.29%
25	Dry Run	2921 Dry Run Dr	Hillsborough	NC	27278	14	5	35.71%	7	50.00%	0	0.00%	0	0.00%	2	12.50%
26	Duke Forest Park AKA Dixie	203 Duke Forest Park Ln	Durham	NC	27705	23	6	26.09%	17	73.91%	0	0.00%	0	0.00%	0	0.00%
27	Eastbrook	3268 Eastbrook Dr	Chapel Hill	NC	27516	5	0	0.00%	2	40.00%	3	60.00%	0	0.00%	0	0.00%
28	Eno	6008 US 70 E	Durham	NC	27705	14	6	42.86%	7	50.00%	1	7.14%	0	0.00%	0	0.00%
29	Euglina Junction	3216 University Station Rd	Durham	NC	27705	29	20	68.97%	7	24.14%	2	6.90%	0	0.00%	0	0.00%
30	Forest Acres Park I	3200 Carl Durham Rd	Chapel Hill	NC	27516	0	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
31	Freeland	6321 NC 86 S	Chapel Hill	NC	27514	9	0	0.00%	5	55.56%	4	44.44%	0	0.00%	0	0.00%
32	Gores	5208 Mt Willing Rd	Mebane	NC	27302	6	0	0.00%	1	16.67%	1	16.67%	4	66.67%	0	0.00%
33	Graham's	157 Aubrey Graham Ln	Efland	NC	27243	16	6	37.50%	6	37.50%	2	12.50%	0	0.00%	2	11.11%
34	Hatch's	5721 West Ten Rd	Mebane	NC	27302	9	0	0.00%	0	0.00%	6	66.67%	0	0.00%	3	25.00%
35	Highwoods MH Community	2107 US 70A	Hillsborough	NC	27278	42	6	14.29%	14	33.33%	7	16.67%	0	0.00%	15	26.32%
36	Hilltop	7105 NC 86 S	Chapel Hill	NC	27516	34	14	41.18%	16	47.06%	2	5.88%	0	0.00%	2	5.56%
37	Homestead	6421 NC 86 S	Chapel Hill	NC	27514	37	0	0.00%	2	5.41%	6	16.22%	1	2.70%	28	43.08%
38	Homestead Acres	222 Homestead Rd	Chapel Hill	NC	27516	6	0	0.00%	3	50.00%	3	50.00%	0	0.00%	0	0.00%
39	J & J	6624 Alexander Dr	Chapel Hill	NC	27514	14	10	71.43%	2	14.29%	0	0.00%	0	0.00%	0	0.00%
40	J & T AKA Lynch's	8520 High Rock Rd	Efland	NC	27243	8	0	0.00%	3	37.50%	4	50.00%	0	0.00%	1	11.11%
41	Johnson p/o AKA Watts	1200 Old Greensboro Rd	Chapel Hill	NC	27516	14	0	0.00%	3	21.43%	6	42.86%	0	0.00%	5	26.32%
42	Kart-Wheel AKA Lloyd's	2209 Old Greensboro Rd	Chapel Hill	NC	27516	7	1	14.29%	2	28.57%	3	42.86%	2	28.57%	0	0.00%
43	Kenwood	1404 Old Cedar Grove Rd	Hillsborough	NC	27278	8	1	12.50%	2	25.00%	1	12.50%	0	0.00%	4	33.33%
44	Klein Park	237 Collins Ave	Hillsborough	NC	27278	5	0	0.00%	3	60.00%	2	40.00%	0	0.00%	0	0.00%
45	L & W AKA Smith	5200 Old Hillsborough Rd	Durham	NC	27705	39	2	5.13%	7	17.95%	11	28.21%	9	23.08%	10	20.41%
46	Lake Orange Trace	202 Lake Orange Rd	Hillsborough	NC	27278	11	2	18.18%	5	45.45%	1	9.09%	1	9.09%	2	15.38%
47	Lakeview	1000 Weaver Dairy Rd	Chapel Hill	NC	27514	33	2	6.06%	17	51.52%	14	42.42%	0	0.00%	0	0.00%
48	Loman's	2004 Lori Dr	Hillsborough	NC	27278	5	0	0.00%	3	60.00%	2	40.00%	0	0.00%	0	0.00%
49	Maple Ridge	5901 Craig Rd	Durham	NC	27712	87	21	24.14%	30	34.48%	35	40.23%	1	1.15%	1	1.14%
50	McFarland's	5712 Couch Mountain Rd	Durham	NC	27705	19	3	15.79%	13	68.42%	1	5.26%	1	5.26%	1	5.00%
51	Mebane	202 Supper Club Rd	Mebane	NC	27302	35	1	2.86%	16	45.71%	17	48.57%	0	0.00%	0	0.00%
52	Midway	2302 NC 86 N	Hillsborough	NC	27278	5	2	40.00%	2	40.00%	1	20.00%	0	0.00%	0	0.00%
53	Mobile Acres II AKA Flowers	6900 Mt Hermon Church Rd	Durham	NC	27705	63	16	25.40%	39	61.90%	8	12.70%	0	0.00%	1	1.56%
54	North Side Mobile Park	811 Faucette Mill Rd	Hillsborough	NC	27278	18	5	27.78%	9	50.00%	4	22.22%	0	0.00%	6	25.00%
55	O & M	4200-4 Old NC 10	Durham	NC	27705	7	1	14.29%	3	42.86%	3	42.86%	0	0.00%	0	0.00%
56	Oak Grove	1501 Ford Rd	Chapel Hill	NC	27516	34	0	0.00%	17	50.00%	14	41.18%	0	0.00%	3	8.11%
57	Oakdale	909 Oakdale Dr	Hillsborough	NC	27278	36	3	8.33%	26	72.22%	7	19.44%	0	0.00%	0	0.00%
58	Old Farm	6121 NC 86 S	Chapel Hill	NC	27514	20	2	10.00%	10	50.00%	7	35.00%	0	0.00%	1	4.76%
59	Orange	2707 University Station Rd	Durham	NC	27705	28	2	7.14%	9	32.14%	17	60.71%	0	0.00%	0	0.00%
60	Orange Mobile Home Estates	1500 Old NC 10	Hillsborough	NC	27278	36	0	0.00%	21	58.33%	3	36.11%	2	5.56%	9	20.00%
61	Parkview	2910 University Station Rd	Durham	NC	27705	9	1	11.11%	5	55.56%	3	33.33%	0	0.00%	1	10.00%
62	Partin's AKA Terrell's	405 US 70A	Hillsborough	NC	27278	12	0	0.00%	0	0.00%	11	91.67%	1	8.33%	1	7.69%

63	Payne's	505 Latimer St	Hillsborough	NC	27278	5	1	20.00%	0	0.00%	1	20.00%	2	40.00%	1	16.67%
64	Piedmont	3727 Brockwell Rd	Durham	NC	27705	11	7	63.64%	4	36.36%	0	0.00%	0	0.00%	0	0.00%
65	Pine Grove	810 Old Fayetteville Rd	Chapel Hill	NC	27516	39	0	0.00%	3	7.69%	35	89.74%	0	0.00%	1	2.50%
66	Pineview	2010 NC 54 W	Chapel Hill	NC	27516	17	0	0.00%	3	17.65%	9	52.94%	5	29.41%	0	0.00%
67	Pinewood	3519 Billy Efland Dr	Efland	NC	27243	15	0	0.00%	8	53.33%	6	40.00%	0	0.00%	1	6.25%
68	Rayl's	2112 US 70A	Hillsborough	NC	27278	0	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
69	Ray's	418 US 70A	Hillsborough	NC	27278	5	0	0.00%	4	80.00%	1	20.00%	0	0.00%	0	0.00%
70	Ridgewood	2000 Ridgewood Rd	Chapel Hill	NC	27516	56	13	23.21%	36	64.29%	7	12.50%	0	0.00%	1	1.75%
71	Riley's	9407 Orange Grove Rd	Chapel Hill	NC	27516	25	4	16.00%	19	76.00%	1	4.00%	0	0.00%	1	3.85%
72	Rimmer's	4802 Dairyland Rd	Hillsborough	NC	27278	5	1	20.00%	2	40.00%	1	20.00%	1	20.00%	0	0.00%
73	Rives	1134 White Cross Rd	Chapel Hill	NC	27516	4	0	0.00%	0	0.00%	3	75.00%	1	25.00%	0	0.00%
74	Rocky Brook	500 S Greensboro St	Carrboro	NC	27510	41	5	12.20%	20	48.78%	16	39.02%	0	0.00%	0	0.00%
75	S & H AKA Walker's	2918 University Station Rd	Durham	NC	27705	7	4	57.14%	3	42.86%	0	0.00%	0	0.00%	3	30.00%
76	Shady Oaks AKA Davis	120 Frazier Rd	Mebane	NC	27302	13	5	38.46%	5	38.46%	1	7.69%	0	0.00%	2	13.33%
77	Simmons	5517 Willett Rd	Durham	NC	27705	6	0	0.00%	6	100.00%	0	0.00%	0	0.00%	0	0.00%
78	Spirit Hill	712 Spirit Hill Rd	Hillsborough	NC	27278	10	4	40.00%	5	50.00%	1	10.00%	0	0.00%	0	0.00%
79	Spring Hill	3500 Old Greensboro Rd	Chapel Hill	NC	27516	17	0	0.00%	6	35.29%	2	11.76%	0	0.00%	9	34.62%
80	Stevens	113 Violet Ann Way	Hillsborough	NC	27278	6	4	66.67%	0	0.00%	1	16.67%	0	0.00%	1	14.29%
81	Stonegate	1708 Curtis Bane Rd	Durham	NC	27705	32	29	90.63%	3	9.38%	0	0.00%	0	0.00%	0	0.00%
82	Supper Club Rd AKA Hall's Rentals or Adams	211 Supper Club Rd	Mebane	NC	27302	15	1	6.67%	4	26.67%	8	53.33%	0	0.00%	2	11.76%
83	Tarheel	1208 Martin Luther King Jr Blvd	Chapel Hill	NC	27514	72	10	13.89%	26	36.11%	35	48.61%	1	1.39%	0	0.00%
84	Tate's	7980 Rogers Rd	Chapel Hill	NC	27516	0	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
85	The Ranch	425 Ranch Rd	Chapel Hill	NC	27516	25	0	0.00%	15	60.00%	6	24.00%	0	0.00%	4	13.79%
86	The Woods	3401 Alice St	Hillsborough	NC	27278	50	1	2.00%	48	96.00%	1	2.00%	0	0.00%	0	0.00%
87	Timber Ridge	117 Timberidge Ct	Chapel Hill	NC	27516	21	4	19.05%	16	76.19%	1	4.76%	0	0.00%	0	0.00%
88	Timbers	1000 Timbers Dr	Hillsborough	NC	27278	80	10	12.50%	34	42.50%	17	21.25%	7	8.75%	12	13.04%
89	Tinnini's	220 Green Tinnin Rd	Hillsborough	NC	27278	6	1	16.67%	1	16.67%	2	33.33%	1	16.67%	1	14.29%
90	Trollinger's	4418 Dairyland Rd	Hillsborough	NC	27278	10	1	10.00%	1	10.00%	0	0.00%	0	0.00%	8	44.44%
91	University Estates Mobile	220 Memory Ln	Durham	NC	27705	12	0	0.00%	10	83.33%	2	16.67%	0	0.00%	0	0.00%
92	University Heights	5920 Wilkins Dr	Durham	NC	27705	17	0	0.00%	10	58.82%	4	23.53%	1	5.88%	2	10.53%
93	Village AKA Wright's	1660 Martin Luther King Jr Blvd	Chapel Hill	NC	27514	24	3	12.50%	15	62.50%	6	25.00%	0	0.00%	0	0.00%
94	White Cross AKA Burch	2606 NC 54 W	Chapel Hill	NC	27516	12	1	8.33%	5	41.67%	1	8.33%	1	8.33%	0	0.00%
95	Windham	3102 Southern Dr	Efland	NC	27243	15	0	0.00%	6	40.00%	5	33.33%	4	26.67%	0	0.00%
96	Woodcrest	5708 Familiar Way	Chapel Hill	NC	27516	12	3	25.00%	2	16.67%	2	16.67%	1	8.33%	4	25.00%
97	Woodland AKA Woods	729 Lawrence Rd	Hillsborough	NC	27278	22	8	36.36%	14	63.64%	0	0.00%	0	0.00%	0	0.00%
98	Woodland Acres	209 Dailwood Ln	Chapel Hill	NC	27516	8	2	25.00%	4	50.00%	0	0.00%	0	0.00%	2	20.00%
99	Woods	4117 US 70 E	Durham	NC	27705	20	2	10.00%	6	30.00%	10	50.00%	0	0.00%	2	9.09%
100	Woods Edge	1601 Phoebe Dr	Hillsborough	NC	27278	64	5	7.81%	48	75.00%	8	12.50%	0	0.00%	3	4.48%
Total:						2246	378	16.83%	989	44.03%	580	25.82%	69	3.07%	250	10.02%



MOBILE HOME AND MOBILE HOME PARKS FACT SHEET

Definitions

Based on the Orange County Unified Development Ordinance (UDO) a **mobile home**, also known as a manufactured home, is defined as a dwelling unit, transportable in one or more sections that:

- Is not constructed in accordance with the standards of the North Carolina Uniform Residential Building Code for One- and Two-Family Dwellings,
- Is composed of one or more components, each of which was substantially assembled in a manufacturing plant and designed to be transported to the home site on its own chassis,
- Exceeds 40 feet in length and eight feet in width,
- The manufacturer voluntarily files certification required by the Secretary of the Department of Housing and Urban Development (HUD) and complies with the standards established, and
- Is built on a permanent chassis and designed to be used with or without a permanent foundation when connected to the required utilities.

A **mobile home park** or subdivision is a parcel (or contiguous parcels) of land divided into two or more manufactured home lots for rent or sale.

Permitting

Mobile homes are allowed on individual lots, similar to a single family home, in Orange County. To be permitted they are required to meet zoning standards contained in the UDO and be setup in accordance with the North Carolina State Building Code. Currently, individual mobile homes are a permitted use in all residential zoning districts and two general commercial zoning districts, LC-1 (Local Commercial) and EC-5 (Existing Commercial).

Mobile home parks are permitted in the county with the creation of a Mobile Home Park – Conditional Zoning District. Conditional Zoning Districts are floating zoning districts, permitted within most land use designations allowing for the development of specific land uses, in accordance with established standards. A conditional zoning district requires the approval of a rezoning by the Board of County Commissioners, approval of a site plan or Master Plan, and may include agreed-upon conditions of development. The purpose of the Mobile Home Park - Conditional Zoning (MHP-CZ) District is to provide for the development of properly located and planned facilities for mobile home parks. Adequate housing is fundamental to the welfare of county residents; however, conventional housing is not consistently affordable to, nor desired by, all members of the general public. Where properly regulated and located, mobile home parks address the public need for alternative housing and achieve a satisfactory relationship to adjoining and nearby property.

Existing Mobile Home and Mobile Home Parks Information

Throughout the county there are a total of one hundred existing mobile home parks. Over the past fifteen years, no mobile home parks have been constructed or proposed in the county. The following information was collected and compiled based on information and data provided from the Orange County Tax Office, Orange County Environmental Health, and the Orange Water and Sewer Authority (OWASA).

Total Number of Spaces Located in Mobile Home Parks	2,297
Total Number of Occupied Spaces Located in Mobile Home Parks	1,461
Total Number of Mobile Homes in Orange County	4,256

**Lot data was not available for one mobile home park*

Mobile Home Parks – Operating Wastewater Systems

83% On-Site Septic	14% Public System	3% State Permitted System
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Mobile Home Parks – Operating Water Systems

49% Community Well	34% Public System	17% State Permitted System
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Only 14% of existing mobile home parks are operating with a public water and public sewer system.

Location of Mobile Home Parks in Orange County

84% Orange County	7% Hillsborough	5% Chapel Hill	2% Carrboro	2% Mebane
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Potential Affordable Housing Area (PAHA) – Efland Area

Existing Number of Mobile Home Parks	8
Total Number of Spaces Located in the PAHA	127
Total Number of Occupied Spaces Located in the PAHA	104

Potential Mobile Home Park Preservation Area (PMHPPA) – Eno Area

Existing Number of Mobile Home Parks	15
Total Number of Spaces Located in the PMHPPA	396
Total Number of Occupied Spaces Located in the PMHPPA	319

**ORANGE COUNTY
BOARD OF COMMISSIONERS
ACTION AGENDA ITEM ABSTRACT**
Meeting Date: September 8, 2016

**Action Agenda
Item No. 2**

SUBJECT: Greene Tract Historical Information and Options

DEPARTMENT: Manager's Office; Planning &
Inspections

ATTACHMENT(S):

- A. December 10, 2002 Abstract with "A Resolution Reporting the Recommended Concept Plan for the Portion of the Greene Tract that Remains in Joint Ownership" from the Greene Tract Work Group
- B. Map of Greene Tract (Excerpt from 2009 Rogers Road Small Area Task Force)

Note: 2002 Map Attachment was Illegible

INFORMATION CONTACT:

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Travis Myren, Deputy County Manager
(919) 245-2308
Craig Benedict, Planning & Inspections
Director, (919) 245-2592
David Stancil, DEAPR Director (919)
245-2522

PURPOSE: To provide historical information and discuss options for the 104 acre jointly owned (Orange County, Chapel Hill, Carrboro) Greene Tract and 60 acre Orange County Solid Waste Tract.

BACKGROUND: The Greene Tract (164 acres) was acquired in 1984 for \$608,000 and came to Orange County as an asset in the Solid Waste Fund. As a result of the 1998 Interlocal Solid Waste Agreement, 60 acres of the Greene Tract was conveyed to Orange County for "Solid Waste management purposes" (now known as Orange County SW 60 Acre Tract).

The Interlocal Agreement (amended April 12, 2000) provided for the three owning partners to determine, over a two-year period, the ultimate disposition of the remaining 104 jointly held acres. The Agreement further included a repayment mechanism to the Solid Waste Enterprise Fund. The financial reimbursement to the Solid Was Fund began on July 1, 2008.

This link – <http://server3.co.orange.nc.us:8088/WebLink8/DocView.aspx?id=27031&dbid=0> – provides a history of the Greene Tract from 1999 through 2008 which is a compendium of various reports and studies which were presented at a 'Joint Greene Tract Work Session' on April 29, 2008 and at an Assembly of Governments meeting on December 6, 2012.

Attachment A provides information regarding the last action taken by the Board of County Commissioners (BOCC) on December 10, 2002. Although there has been considerable discussion about the future of the Greene Tract, no action has been taken by the BOCC since 2002. Although not specific to the Greene Tract, multiple Historic Rogers Road Area (HRRRA)

small area studies and planning efforts have been conducted by the local governments over the last 15 years. More recently, the HRRRA staff workgroup has been reviewing and developing two new initiatives:

1. The Community First planning program (Rogers Road Eubanks Neighborhood Association (RENA) and the Jackson Center) hired by the joint governments.
2. Multi-Jurisdiction Technical Environmental Scan of the Greene Tract. All aspects are being researched and updated and maybe ready for a joint meeting in the fall.

The remaining 60 acres of the Greene Tract continues to be owned as an asset in the Solid Waste Fund. However, the FY 2016-17 Capital Investment Plan (CIP) includes funds to purchase the property.

Over the years there have been many options (based on various studies) discussed as a possible future use of the 104 acres jointly owned by Orange County, Chapel Hill and Carrboro. Listed below are the options that have been explored:

1. Joint Affordable Housing could be planned for 18.1 acres and the remaining 85.9 acres would remain join open space.
2. The 104 acre tract should remain as open space to be protected by conservation easements.
3. The acreage for affordable housing could be placed in the Land Trust.
4. Chapel Hill Carrboro City Schools requested that part of the Greene Tract be reserved for a future elementary school site. An approximate 11 acre area south of the 18 Affordable Housing site was considered.
5. Rename the property to recognize the headwaters of Bolin Creek, Booker Creek and Old Field Creek.

As a result of the Inter Local Agreement, 60 acres of the Greene Tract was conveyed to Orange County for "Solid Waste management purposes".

FINANCIAL IMPACT: There is no financial impact with the discussion of the future options for the 104 acres of the Greene Tract.

SOCIAL JUSTICE IMPACT: There is no Orange County Social Justice Goal impact associated with discussing the Greene Tract.

RECOMMENDATION(S): The Manager recommends that the Board receives the historical information and discuss options for:

1. The 104 acres of the Greene Tract jointly owned by Orange County, Chapel Hill and Carrboro, and
2. The 60 acre tract.

COPY

ORANGE COUNTY
BOARD OF COMMISSIONERS
ACTION AGENDA ITEM ABSTRACT
Meeting Date: December 10, 2002

Action Agenda
Item No. 8-1

SUBJECT: Approval of Recommendations from the Greene Tract Work Group

DEPARTMENT: County Manager

PUBLIC HEARING: (Y/N)

No

ATTACHMENT(S):

6/26/02 Work Group Resolution
(incorporates Map of Concept Plan)

INFORMATION CONTACT:

Rod Visser, 245-2308
Dave Stancil, 245-2598

TELEPHONE NUMBERS:

Hillsborough 732-8181
Chapel Hill 968-4501
Durham 688-7331
Mebane 336-227-2031

PURPOSE: To consider formal approval of the recommendations from the Greene Tract Work Group regarding the disposition of the 104 acres of the Greene Tract that remain in joint ownership.

BACKGROUND: The solid waste management interlocal agreement signed by the County and Towns in September 1999 and amended in March 2000 lays out parameters under which the Greene Tract owners are to resolve the ultimate disposition of the approximately 104 acres of that parcel that remain in joint ownership. The agreement also addresses how the Solid Waste/Landfill Enterprise Fund is to be reimbursed if the property is put to uses that are not related to the solid waste enterprise. The interlocal agreement anticipated that the Greene Tract owners would reach agreement on the disposition of the property during a bargaining period that concluded on April 17, 2002 (the two year anniversary of the effective date upon which Orange County assumed overall responsibility for solid waste management in Orange County).

The Greene Tract Work Group provided an interim report to the three governing boards in the form of a resolution dated March 21, 2002. That resolution requested that each of the three governing boards approve an extension to the bargaining period to allow the completion of discussions that could lead to consensus on a concept plan for the remainder of the Greene Tract. All three governing boards approved an extension of the bargaining period, which led to the Work Group (with Commissioners Brown and Carey representing the BOCC) reaching consensus on a concept plan for the ultimate disposition of the 104 acres of the Greene Tract remaining under joint ownership. The accompanying resolution and concept plan map reflect the Work Group's recommendations.

The BOCC received a report on the Work Group recommendations at the October 15, 2002 meeting, and indicated general concurrence with the Work Group recommendations. Since that time, the governing boards of Carrboro and Chapel Hill have both acted to accept the Work

Group recommendations. This agenda item provides the BOCC with the opportunity to take formal action to accept the Work Group recommendations, as outlined in the accompanying Work Group resolution.

FINANCIAL IMPACT: There is no financial impact associated directly with the discussion of the resolution. However, the County and Towns will be obliged to reimburse the Landfill Enterprise Fund for the original 1984 purchase price of \$608,000, plus interest, if, as recommended by the Work Group, the Greene Tract is used for purposes other than those of the solid waste system. As directed by the Board at the October 15 meeting, the Manager will confer with the Carrboro and Chapel Hill Town Managers to develop recommendations by March 2003 back to the respective governing boards regarding the structure, timing, and source of reimbursement funding to the Landfill Enterprise Fund.

RECOMMENDATION(S): The Manager recommends that the Board approve the recommendations outlined in the accompanying Greene Tract Work Group resolution.

GREENE TRACT WORK GROUP

A RESOLUTION REPORTING THE RECOMMENDED CONCEPT PLAN FOR THE PORTION OF THE GREENE TRACT THAT REMAINS IN JOINT OWNERSHIP

WHEREAS, Orange County and the Towns of Carrboro and Chapel Hill acquired the property known as the Greene Tract in 1984 as an asset of the joint solid waste management system; and

WHEREAS, title to 60 acres of this property was deeded exclusively to Orange County in 2000 under provisions of the 1999 interlocal "Agreement for Solid Waste Management"; and

WHEREAS, under the same interlocal agreement the County and Towns agreed to bargain in good faith during the two year period following the effective date of the agreement to determine the ultimate use or disposition of the balance of the acreage on the Greene Tract; and

WHEREAS, the end date of the "bargaining period" as defined in the agreement was April 17, 2002, the second anniversary of the date upon which the County assumed overall responsibility for solid waste management in Orange County; and

WHEREAS, the Greene Tract Work Group considered direction from the respective governing boards, comments from interested citizens and organizations, and information developed by staff in response to Work Group inquiries in developing a recommended concept plan for the balance of the Greene Tract; and

WHEREAS, the Work Group reported to all three governing boards in a resolution dated March 21, 2002 that it had reached substantial agreement on a concept plan providing for approximately 78 acres to be earmarked for open space protected by conservation easements and approximately 15 acres to be earmarked for affordable housing but had not yet reached agreement regarding what designation should be placed on the remaining 11 acres; and

WHEREAS, the Work Group had recommended in that March 21, 2002 resolution that the following additional steps be taken:

- The area shown on the concept plan as open space should be protected by executing a conservation easement between appropriate parties
- The Board of County Commissioners should consider protecting its 60 acre portion of the Greene Tract by executing a conservation easement with an appropriate party
- The Chapel Hill Town Council should consider initiating a small area planning process to examine desirable land uses for the Purefoy Road area
- The property should be renamed in a manner that recognizes the significance of this area as the headwaters for three important streams (Bolin Creek, Old Field Creek, and Booker Creek)
- The governing boards should take note of the public investment already made in the general vicinity of the Greene Tract, as cataloged in an accompanying table; and

WHEREAS, the governing boards of all three jurisdictions approved resolutions extending the bargaining period beyond April 17, 2002 in order to allow the Greene Tract Work Group additional time to try to reach consensus on the basic uses to be established for the approximately 11 acres at that time unresolved; and

WHEREAS, the Work Group received a technical report from the County Engineer outlining the basic alternatives available and approximate costs for providing sewer service to a portion of the Greene Tract, which service would be necessary for the economical and practical provision of affordable housing; and

WHEREAS, the Work Group concluded by consensus that "the carrying capacity of the land" should be the determining factor in establishing how much of the unresolved 11 acres should be earmarked for specific purposes, and that the ridge line reflected on the accompanying concept map determines the portion (approximately one-third) of the 11 acres that can practically be used for affordable housing served by a sewer line that would access the Greene Tract via Purefoy Road:

NOW, THEREFORE, BE IT RESOLVED THAT the Greene Tract Work Group does hereby recommend that the Carrboro Board of Aldermen, the Chapel Hill Town Council, and the Orange County Board of Commissioners accept the accompanying map as the Work Group's consensus recommendation for a concept plan for that portion of the Greene Tract not deeded exclusively to Orange County, with the acreage to be set aside for open space protected by conservation easements approximating 85.90 acres and the acreage for affordable housing approximating 18.10 acres;

BE IT FURTHER RESOLVED THAT the Greene Tract Work Group does hereby recommend to the three governing boards that the acreage for affordable housing be placed in the Land Trust;

BE IT FURTHER RESOLVED THAT the Greene Tract Work Group does hereby recommend to the three governing boards that the Managers investigate options for reimbursement of the Solid Waste/Landfill Enterprise Fund for the portions of the site designated for affordable housing and open space; and

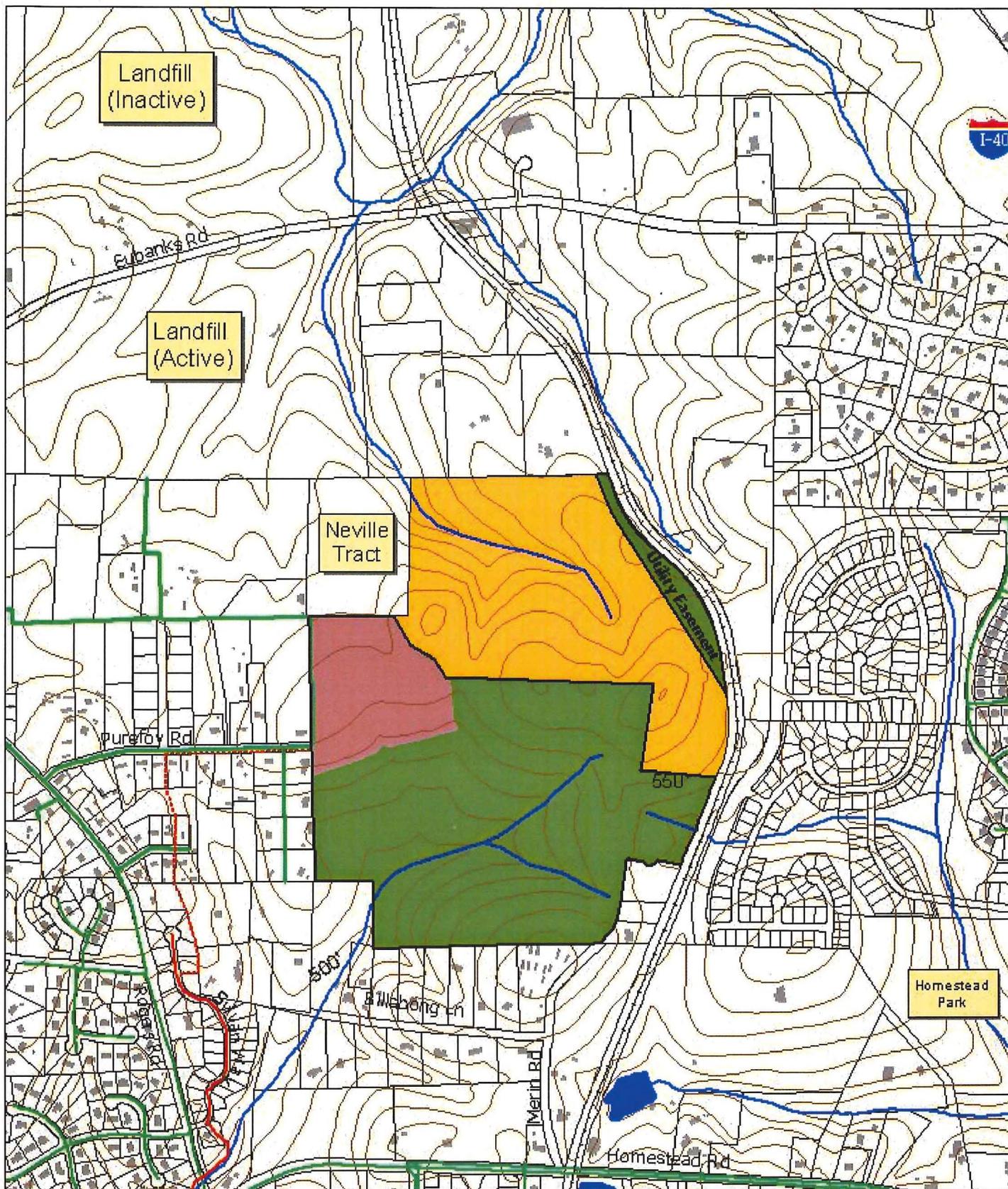
BE IT FURTHER RESOLVED THAT the Greene Tract Work Group does hereby recommend to the three governing boards that the triggering mechanism for reimbursement to the Solid Waste/Landfill Enterprise Fund should be formal action taken by all three boards to approve conservation easements protecting the designated open space, with such approvals taking effect no sooner than July 1, 2003, and no later than July 1, 2005.

This, the 26th day of June, 2002.

Moses Carey, Jr.
Chair
Greene Tract Work Group

Greene Tract Concept Plan

Approved by the Greene Tract Workgroup, 6/26/02



- Potential Sewer Line
- Existing Sewer Line
- Railroad
- Water Line
- Streams
- Contour Lines



Orange County
Environment & Res

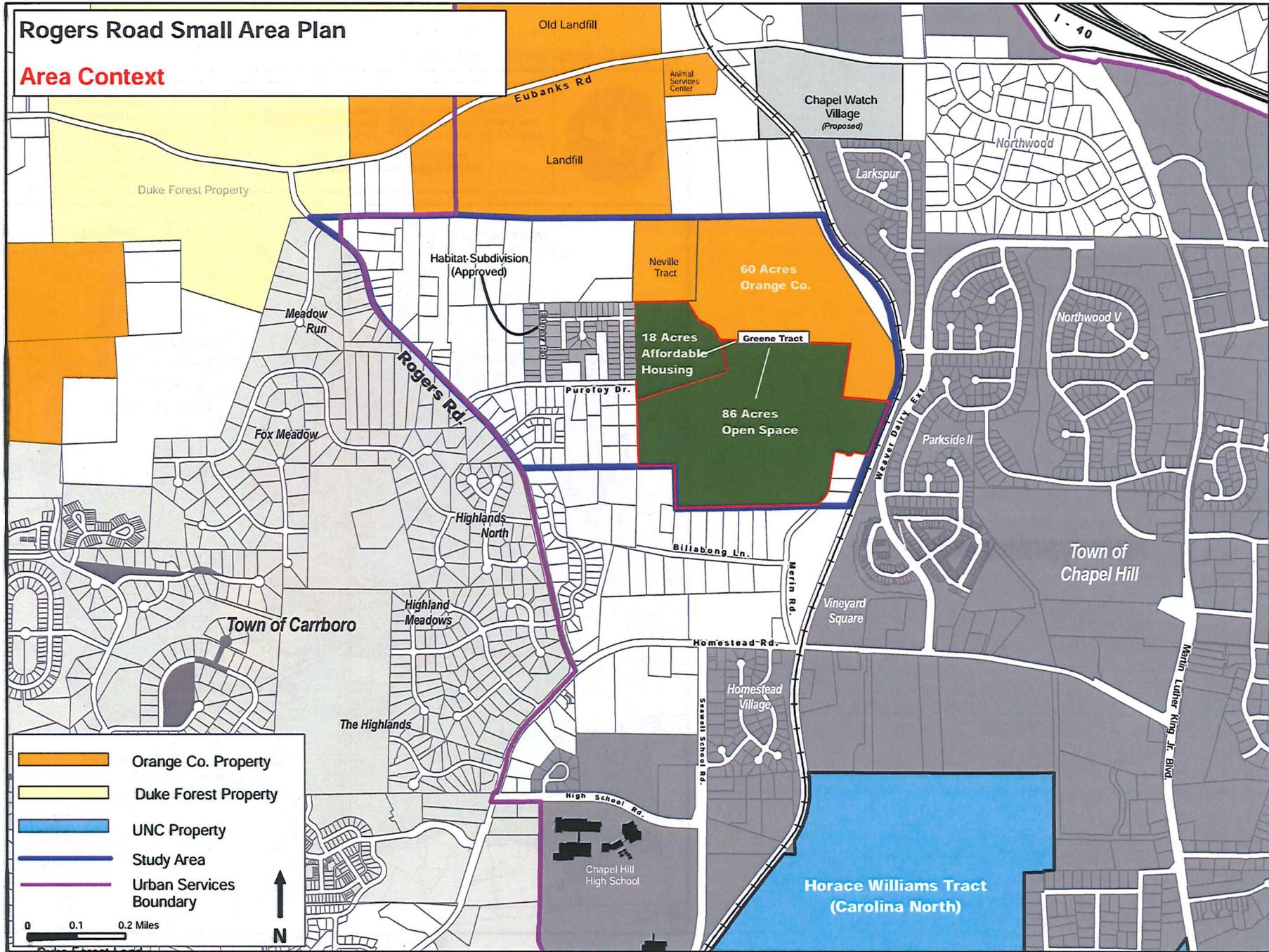


Figure 2 - Rogers Road Area Context

**ORANGE COUNTY
BOARD OF COMMISSIONERS**

ACTION AGENDA ITEM ABSTRACT

Meeting Date: September 8, 2016

**Action Agenda
Item No. 3**

SUBJECT: General Fund Unassigned Fund Balance Policy

DEPARTMENT: Finance and Administrative
Services

ATTACHMENT(S):

- A. BOCC Fund Balance Policy
- B. PowerPoint Presentation

INFORMATION CONTACT:

Bonnie Hammersley, 919-245-2300
Travis Myren, 919-245-2308
Gary Donaldson, 919-245-2453
Paul Laughton, 919-245-2152

PURPOSE: To continue a review of the County's Unassigned General Fund Balance policy.

BACKGROUND: On April 5, 2011 the BOCC adopted a fund balance policy that states:

The County will strive to maintain an unassigned fund balance in the General Fund of 17% percent of budgeted general fund operating expenditures each fiscal year. The amount of unassigned fund balance maintained during each fiscal year should not fall below 8% percent of budgeted general fund operating expenditures, as recommended by the North Carolina Local Government Commission.

The Finance Director made a presentation to the Board at the June 16, 2016 budget work session which provided information on the County's General Fund balance policy, best practices, and benchmarking with other peer North Carolina counties.

The BOCC requested continuation of this discussion as part of the September 8 work session agenda. In addition, the Finance Director as part of:

- 1) **Each Quarterly Financial Report;** provide an update of the County General Fund reserve levels to the BOCC
- 2) **The new Five Year Financial Plan framework;** include County General Fund Balance data which will be presented to the BOCC

FINANCIAL IMPACT: There is no financial impact from this work session presentation.

SOCIAL JUSTICE IMPACT: There is no Orange County Social Justice Goal impact associated with the Board continuing discussion on this item.

RECOMMENDATION(S): The Manager recommends that the Board continue discussion on the County's Unassigned General Fund Balance policy and provide any direction to staff.

ORANGE COUNTY BOARD OF COMMISSIONERS FUND BALANCE MANAGEMENT POLICY

The Fund Balance Management Policy is intended to address the needs of Orange County (County), in the event of unanticipated and unavoidable occurrences which could adversely affect the financial condition of the County and thereby jeopardize the continuation of necessary public services. This policy will ensure the County maintains adequate fund balance and reserves in the County's **Governmental Funds** to provide the capacity to:

1. Provide sufficient cash flow for daily financial needs,
2. Secure and maintain investment grade bond ratings,
3. Offset significant economic downturns or revenue shortfalls, and
4. Provide funds for unforeseen expenditures related to emergencies.

Fund Balance for the County's **Governmental Funds** will be comprised of the following categories:

1. Nonspendable - amounts that cannot be spent because they are either (a) not in spendable form or (b) legally or contractually required to be maintained intact.
2. Restricted – amounts externally imposed by creditors (debt covenants), grantors, contributors, laws, or regulations of other governments.
3. Committed – amounts used for a specific purpose pursuant to constraints imposed by formal action of the government's highest level of decision-making authority.
 - a. Amounts set aside based on self-imposed limitations established and set in place prior to year-end, but can be calculated after year end.
 - b. Limitation imposed at highest level and requires same action to remove or modify
 - c. Ordinances that lapse at year-end
4. Assigned - amounts that are constrained by the government's intent to be used for specific purposes, but are neither restricted nor committed.
5. Unassigned – amounts that are not reported in any other classification.

The General Fund will be the only fund that will have an unassigned fund balance. The Special Revenue Funds and Capital Project funds will consist of only nonspendable, restricted, committed and assigned categories of fund balance.

Unassigned Fund Balance – General Fund

Orange County has adopted a fiscal policy that provides for capital projects to be financed with debt and pay-as-you-go funding. In order to obtain the best possible financing, the County has adopted policies designed to maintain bond ratings at or better than AAA (Fitch), Aa2 (Moody's Investor Services) and AA+ (Standard & Poor's). Part of the County's fiscal health is maintaining a fund balance position that rating agencies feel is adequate to meet the County's needs and challenges.

Orange County has therefore adopted a policy that requires management to maintain an **unassigned balance** as follows:

1. ***The County will strive to maintain an unassigned fund balance in the General Fund of 17% percent of budgeted general fund operating expenditures each fiscal year. The amount of unassigned fund balance maintained during each fiscal year should not fall below 8% percent of budgeted general fund operating expenditures, as recommended by the North Carolina Local Government Commission.***
2. To the extent that the General Fund **unassigned** fund balance exceeds 17% percent, the balances may be utilized to fund capital expenditures or pay down outstanding County debt.
3. **The County's budget and revenue spending policy provides for programs with multiple revenue sources. The Financial Services Director will use resources in the following hierarchy: bond proceeds, Federal funds, State funds, local non-county funds, county funds. For purposes of fund balance classification, expenditures are to be spent from restricted fund balance first, followed in-order by committed fund balance, assigned fund balance, and lastly, unassigned fund balance. The Financial Services Director has the authority to deviate from this policy if it is in the best interest of the County with Board of County Commissioner's approval.**
4. **Management is expected to manage the budget so that revenue shortfalls and expenditure increases do not impact the County's total unassigned fund balance. If a catastrophic economic event occurs that requires a 10% or more deviation from total budgeted revenues or expenditures, then unassigned fund balance can be reduced by action from the Board of County Commissioners; the Board also will adopt a plan of action to return spendable fund balance to the required level.**

Enterprise Funds - (Solid Waste, Efland Sewer, and the Orange County Sportsplex) – The County will strive to maintain unrestricted net assets greater than 8% of total operating revenues at fiscal year-end, net of any donated assets recognized, to provide reserves for operations and future capital improvements.

Restrictions, reservations, and designations of Net Assets for Enterprise Funds

For external reporting purposes, net assets will be reported as restricted or unrestricted in accordance with GAAP. For internal purposes, net assets will be reserved or designated as follows:

1. Encumbered balances to continue existing projects are designated.
2. Designations for funding of planned projects in a future period to reduce the financial demands placed upon a subsequent budget.

Internal Service Funds – Dental Insurance Fund - total net assets shall maintain a positive balance to illustrate the internal nature of recovery fees for services performed in self-insuring employees of the County. Additionally, the net assets of the fund will demonstrate adequate funding for incurred, but not reported claims.

Rescission

This policy supersedes any policy in place prior to this date.

April 5, 2011



Work Session Update on Appropriate Level of Unassigned Fund Balance



Presentation to Orange County Board of County Commissioners

Gary Donaldson, Chief Financial Officer

September 8, 2016

Regular Finance Updates to BOCC and Manager

➤ *Financial Reporting*

- **Quarterly Financial Report** Provide General Fund Reserve Updates as part of regular financial reporting
- **New Five Year Financial Plan** Provide County General Fund balance information as part of the long-term financial planning

Best Practices for Unassigned General Fund Balance

- The Government Finance Officers Association (GFOA) of U.S. and Canada:
 - Updated the Best Practice on unassigned general fund balances in 2009
 - **At a minimum** an unassigned general fund balance of no less than 2 months of regular general fund operating revenues or operating expenditures
 - **Equates to 16.7%** of either general fund operating revenues or operating expenditures

Appropriate Use of Unassigned General Fund Balance

- The essential uses of General Fund reserves:
 - Mitigate risk attributed to revenue shortfalls or unanticipated non-recurring expenditures
 - Provide a financial bridge during recessions or weak economic conditions
 - Use for natural disasters and emergencies
 - Cash Balance cushion

S&P Scorecard

Rating Factor	Weighting	Imputed Score
Institutional Framework	10%	
Uniform score for all of the same type of governments in same state		
Economy	30%	
Total Market Value Per Capita and Projected Per Capita Effective Buying Income as a % of US Projected Per Capita EBI		
Management	20%	
Issuer's Financial Management Assessment Score considered with other certain qualitative factors		
Financial Measures	30%	
Liquidity (10%) - Total Government Available Cash as % of Total Governmental Funds Debt Service and % of Total Governmental Funds Expenditures		
Budgetary Performance (10%) - Total Governmental Funds Net Result (%) and General Fund Net Results (%)		
Budgetary Flexibility (10%) - Available Fund Balance as a % of Expenditures		
Debt and Contingent Liabilities	10%	
Net Direct Debt as % of Total Governmental		

Moody's Scorecard

Rating Factor	Weighting
Economy/Tax Base	30%
Tax Base Size (full value)	10%
Full Value per Capita	10%
Wealth (median family income)	10%
Finances	30%
Fund Balance (% of Revenues)	10%
Fund Balance Trend (5-Yr Change)	5%
Cash Balance (% of Revenues)	10%
Cash Balance Trend (5-Yr Change)	5%
Management	20%
Institutional Framework	10%
Operating History	10%
Debt/Pensions	20%
Debt to Full Value	5%
Debt to Revenue	5%
Moody's adjusted Net Pension Liability (3-Yr average) to Full Value	5%
Moody's adjusted Net Pension Liability (3-Yr average) to Revenue	5%

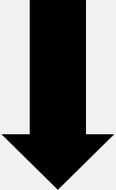
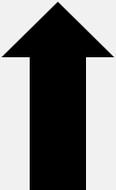
The Ten 'AAA' Rated Counties of North Carolina

County Government	Unassigned Fund Balance Policy As of % Expenditures ¹
1. Mecklenburg County	28%
2. Durham County	25%
3. Wake County	25%
4. New Hanover County	21%
5. Union County	20%
6. Orange County	17%
7. Chatham County	17%
8. Forsyth County	16%
9. Buncombe County	15%
10. Guilford County	<u>14.8%</u> ²
Average	19.8%

1) 8.3% equates to one month

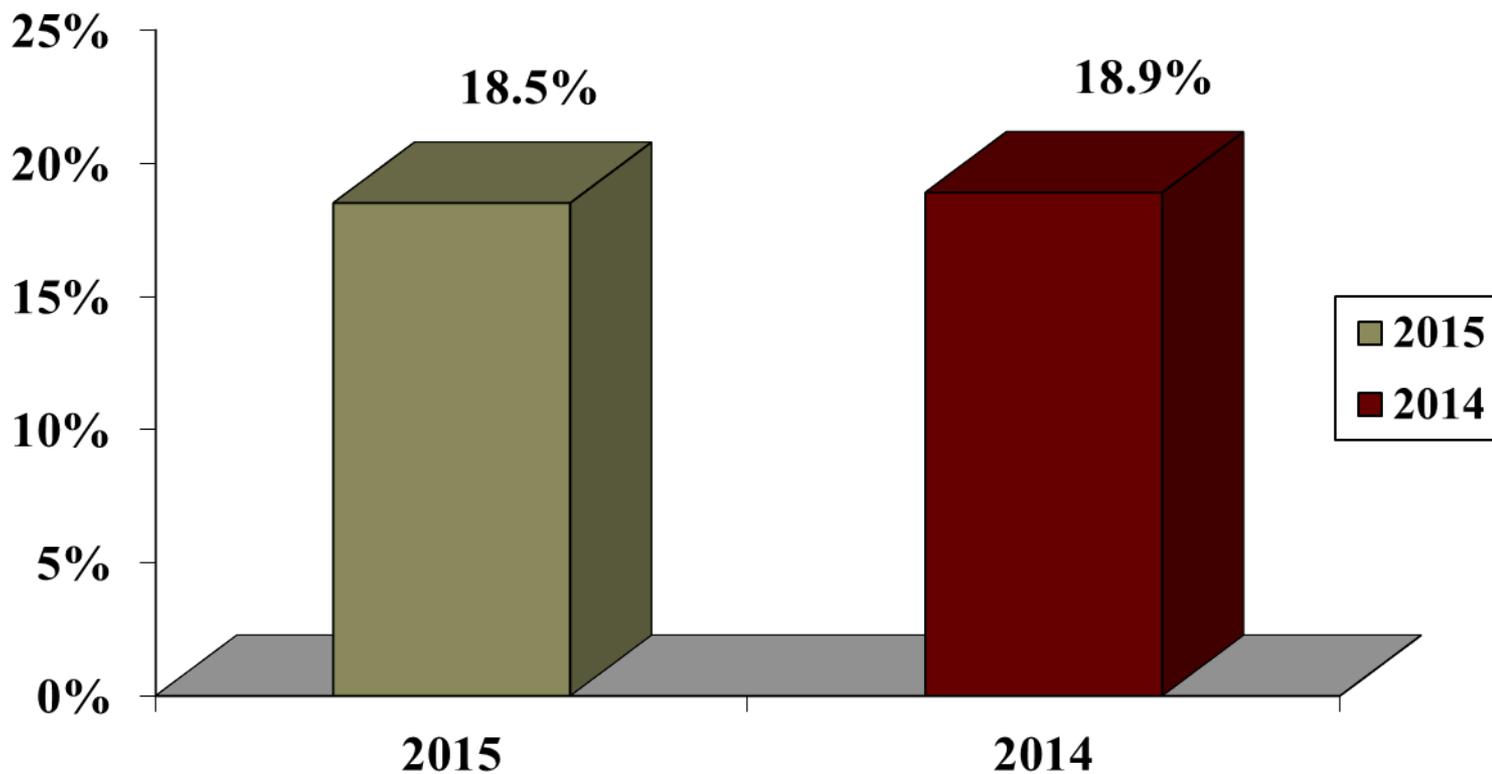
2) Not policy; represents unassigned fund balance as of June 30, 2015

General Obligation Bond Rating Scale ¹³

		MOODY'S	STANDARD & POOR'S	FITCH
Investment Grade	STRONGEST	Aaa	AAA	AAA
		Aa	AA	AA
		A	A	A
		BBB	BBB	BBB
Non-Investment Grade		Ba	BB	BB
		B	B	B
		Caa	CCC	CCC
		Ca	CC	CC
		C	C	C
		C	D	D
	WEAKEST			

These Bond Ratings are reflective of General Obligation Bonds

Audited Unassigned Fund Balance as a Percent of Expenditures—General Fund



2015- \$35,548,843 / \$192,078,545

2014- \$33,913,229 / \$179,425,656

Best Practice Unassigned Fund Balance

➤ *In Summary*

- **GFOA Recommends** Unassigned Fund Balance at 2 Months of Expenditures or 16.7%
- **North Carolina AAA Rated County Peers** Maintain at Least 2 Months; one exception
- Strong Fund Balance provides Financial Bridge in Recession and Emergencies

General Fund Cash flow

	Jul-15	Aug-15	Sep-15
BEGINNING CASH BALANCE	\$ 60,812,461	\$ 48,464,119	\$ 46,821,563
REVENUES	\$ 2,415,302	\$ 12,290,160	\$ 9,991,833
EXPENDITURES	\$ 14,763,644	\$ 13,932,716	\$ 20,835,949
NET CASH	\$ (12,348,342)	\$ (1,642,556)	\$ (10,844,116)
ENDING CASH BALANCE	\$ 48,464,119	\$46,821,563	\$35,977,447

The first quarter of the fiscal year specifically the month of September represents the County's lowest cash balance period.