

Public Review Draft - August 9, 2023

RECODE
CHATHAM

PLAN MONCURE





Farmstead near Corinth
(Source: Green Heron Planning)

ACKNOWLEDGEMENTS

Thank you to all the individuals and organizations who committed their time and energy to this effort.

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Plan Moncure Stakeholders*

Moncure Residents
Moncure Business Owners
Land Developers
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Faith Leaders
Environmental Groups
Duke Energy
NCDEQ

* Lists of names of individuals that participated in these groups are available through the Chatham County Planning Department.



The Deep River above Buckhorn Dam
(Source: Nealon Planning)

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Moncure Fire Department
(Source: Moncure Fire Department Chief Shi)

I. INTRODUCTION

In 2017, the Chatham County Board of Commissioners completed a major update to its comprehensive plan entitled **Plan Chatham**, which laid out a vision for the County for years to come.

Compared to other areas of the County, the unincorporated portions in southeastern Chatham County were envisioned slightly differently. They included four distinct and sizable “employment centers” in this part of the County, including the Moncure Megasite and adjacent centers along U.S. Highway 1. Of course, at the time **Plan Chatham** was completed, much of the Moncure Megasite—now known as Triangle Innovation Point (TIP)—was undeveloped, and no major economic development project was underway. Regardless, it was important for the Board of Commissioners to designate these lands for economic development purposes. Importantly, the plan provided that, once a tenant for the TIP site was identified, the County would “prepare a ‘small area plan’ for the Moncure Area,” noting that “housing, commercial, and service needs” in the area networks.

On March 29, 2022, Governor Roy Cooper announced that automaker VinFast selected Chatham County as the location of its first North American assembly plant for electric vehicles—the first major automotive plant in North Carolina’s history. Further, the plant was planned on a portion of the TIP East site in Moncure, which is situated along the east side of Pea Ridge Road.

Immediately following this announcement, the County investigated ways to better understand relationships between existing and potential future development as well as between the built environment and the natural resources. The primary objective was to give the community an opportunity to influence the change that would result from the investments already underway. In April 2022, the County took steps to initiate the small area planning process.

This plan, **Plan Moncure**, was developed through a series of activities that engaged the residents, business owners, property owners, and other stakeholders. The process encouraged a dialogue about growth in the Southeastern part of Chatham County spurred by the VinFast announcement and other investments in the region, the potential impacts of such growth, and ways to leverage change for positive outcomes. This document builds on **Plan Chatham** and conveys more specifically the community’s expectations and aspirations for the future of the Moncure area.



Chatham County’s Comprehensive Plan, **Plan Chatham**, adopted in 2017 laid out a vision for the County for years to come.

MARCH 29, 2022: VINFAST SELECTS CHATHAM COUNTY FOR E.V. ASSEMBLY PLANT

- » \$4 Billion investment in Chatham County
- » 7,500 new jobs
- » New infrastructure

II. ABOUT THE STUDY AREA

General Area of Study

The study area, depicted in the Study Area Map, is the subject of the **Plan Moncure** planning effort. It is the unincorporated area in the southeastern portion of Chatham County. It encompasses the historic community of Moncure, hence the name. The area to be studied, however, extends well outside of the geography most County residents associate with Moncure, as County leaders are anticipating the need to address the issues and opportunities of potential growth in this broader area of the county over the next decade or more.

For purposes of **Plan Moncure**, the study area is defined as the area within which future land use will be depicted in the final plan. It is restricted to Chatham County's planning and zoning jurisdiction and includes related places that are not addressed by other adopted land use plans. As shown in the Study Area Map, it is delineated as follows:

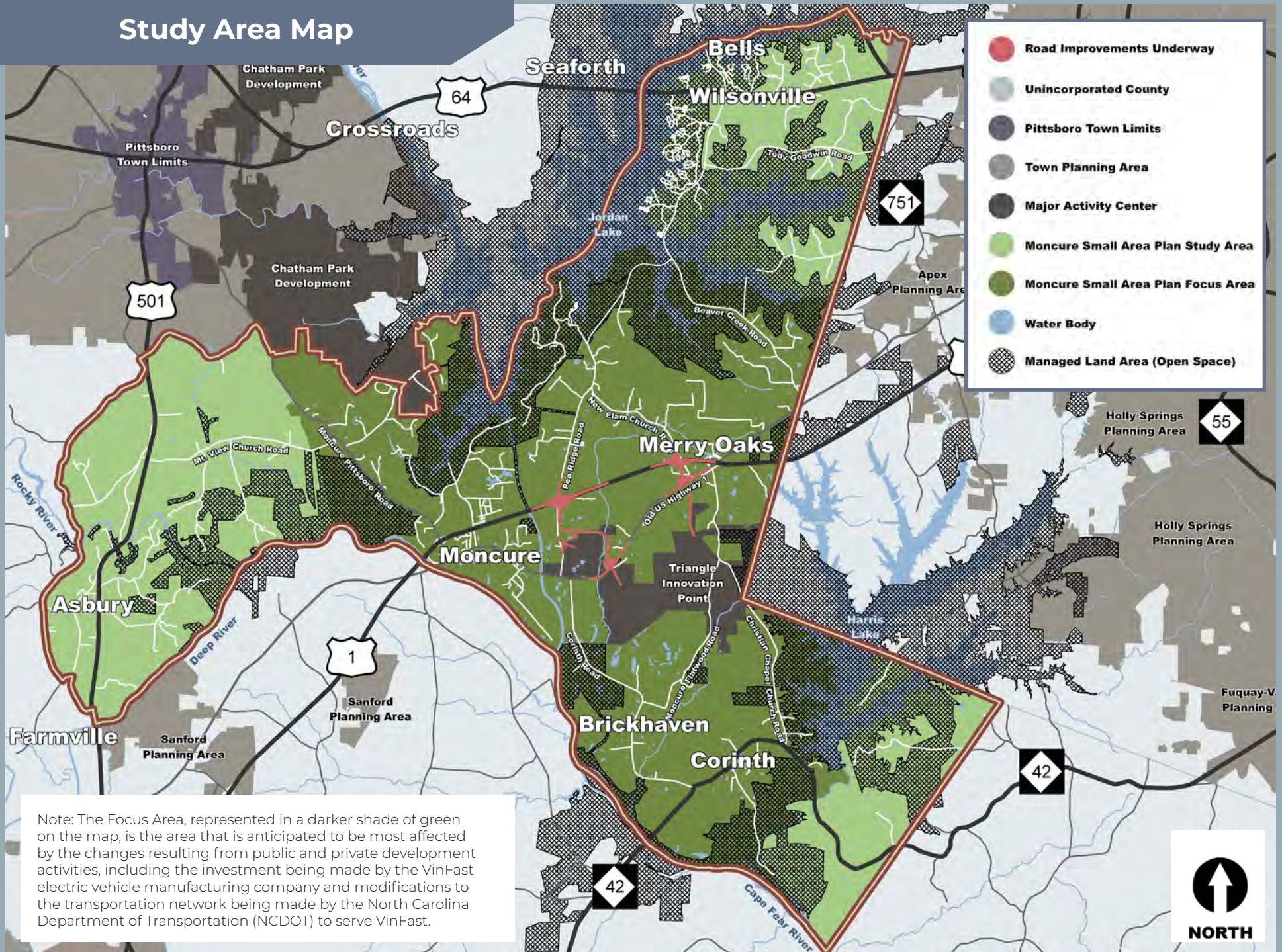
- the County limits form the south and east sides;
- the US-501 corridor defines the western edge; and
- the Town of Pittsboro's extraterritorial jurisdiction (ETJ), Jordan Lake, and the study area of the Chatham Cary Joint Land Use Plan, in combination, demarcate the northern boundary.

"Low light pollution, star gazing, migratory birds, rural character, small town feel, Moncure School, lake access with boat launch, rivers, and trails."

-Residents of Moncure area, when asked what are the reasons people come to visit, and stay, in the area.

More detailed information about the Study Area is provided in the Existing Conditions Summary (Appendix A).

Study Area Map



Population

Population in Chatham County, the study area, and Moncure is projected to grow faster than in the Triangle overall.

EXISTING POPULATION

While there are 4,000 residents in the broader study area, there are fewer than 800 people residing in the Moncure area.

DEMOGRAPHICS

Compared to the study area as a whole, the immediate Moncure area has

- a larger percentage of Black (16%) and Hispanic (15%) residents
- moderate incomes with a low poverty rate (3.5%)
- lower education attainment

POPULATION PROJECTIONS

The population of Chatham County is projected to grow between 2023 and 2040 by approximately 35% (or a rate of 1.75% per year). **This is much higher than the projected growth for the Triangle region, which is approximately 24%.**

Figure 1. Chatham County Population Historical and Projected, 2000-2040
(Source: NC Office of State Budget & Management)

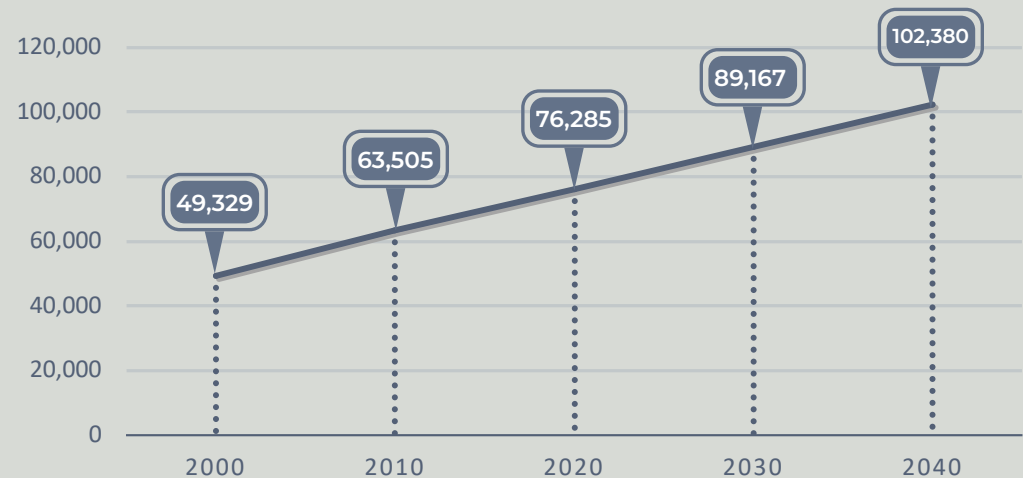
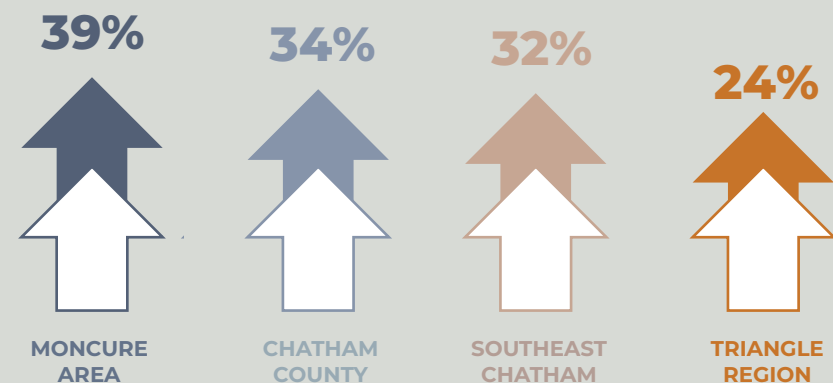


Table 1. Population Growth Projections, 2023-2040

	Total Percentage Increase	Annual Percentage Increase
Triangle Region	24%	1.26%
Chatham County	34%	1.76%
Southeast Chatham	32%	1.66%
Moncure Area	39%	1.97%



Environment & Natural Resources

The study area is home to numerous environmental resources including important surface water bodies, flora, and fauna.

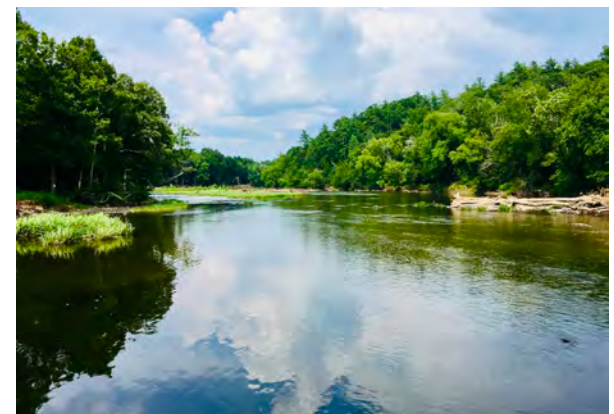
For example, the Cape Fear Shiner is an imperiled minnow found only in the Cape Fear River Basin of North Carolina - and no where else in the world. The County is home to a number of other threatened or endangered species and designated Natural Heritage Areas.

The entire County, in fact, is located within the Cape Fear River Basin, which is divided into a number of different watershed areas for the purpose of implementing state and local watershed policies. Chatham County has a Watershed Protection Ordinance that applies countywide, which limits impervious surface area on developed property and includes riparian buffer standards.

In addition, the Study Area includes designated lakes, streams, rivers, water supply areas, and water supply sources, the major water courses being the Haw River, Deep River, Cape Fear River, Shaddox Creek, and Weaver Creek.

At the time **Plan Moncure** was underway, the County was revisiting and updating its environmental regulations as part of its "Unified Development Ordinance" update.

Finally, it is important to point out the Natural Heritage Areas designated within the Moncure Study Area, which includes Lower Deep River Shoals, Haw River Levees and Bluffs, Dicenetra Slopes, and the Cape Fear River/McKay Island Floodplain; as well as the Managed Areas, which include Deep River State Trail, Jordan Dam and Lake, Harris Game Land, and Chatham Game Reserve.



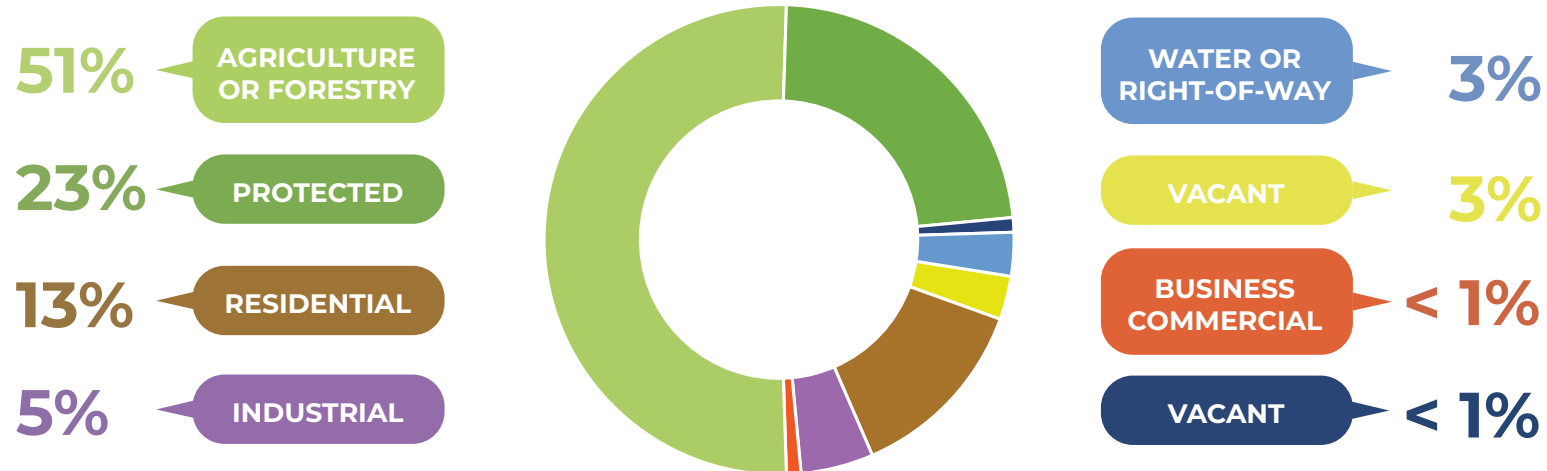
Top: A sunset over Jordan Lake.
Middle: Jordan Lake from the U.S. Army Corps of Engineers Visitor Center.
Bottom: Confluence of Rocky River and Deep River.

Development Pattern & Land Use

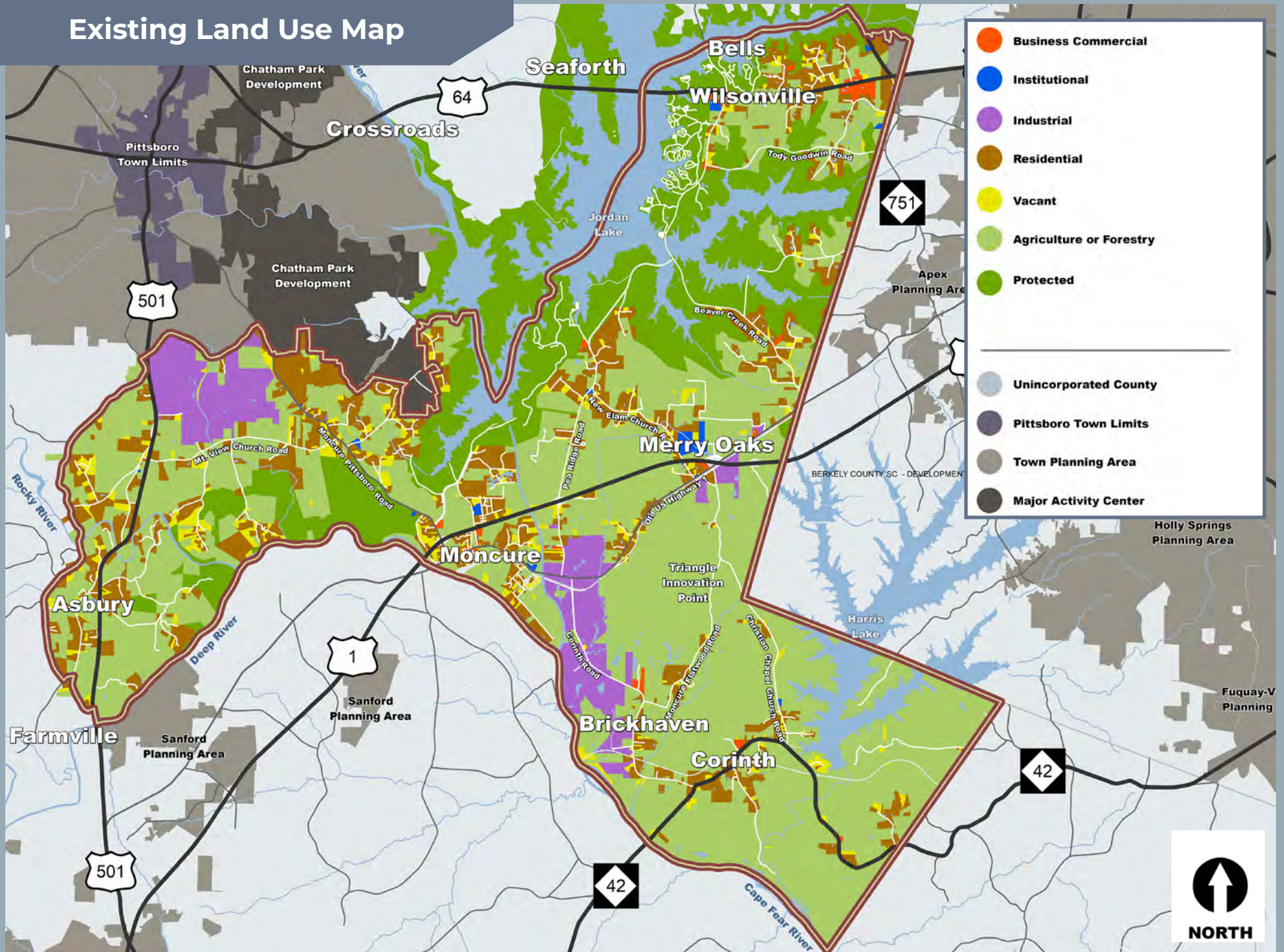
Moncure is presently a rural community along US-1. It is an unincorporated area of Chatham County. The lack of wastewater service has helped maintain Moncure as a relatively undeveloped area of the county.

Based on Chatham County tax parcel data, the majority of land in the study area is currently being utilized for agriculture, which includes timber operations and management. Agricultural uses account for approximately 51% of the land area. Protected open space is the next largest land use at 23%, and another 3% is comprised of surface water and rights-of-way for roads and utilities. Most of the “protected” acres are part of the Jordan Lake State Recreation Area as well as large tracts of land in conservation easements held by land trusts. Residential development occupies roughly 13% of the study area. Commercial and industrial areas account for less than 10% of the land area. Only 3% of the study area is considered undeveloped or “vacant.”

Figure X. Existing Land Use as a Percentage of Study Area



Existing Land Use Map



Key Places

Considered to be one of the more rural areas of Chatham County, Moncure has been the location of selected kinds of development dating back to the later 19th century, including homes, small-scale commercial businesses, and large-scale industrial activity. While housing is part of the development pattern, many nonresidential uses occupy sites in the area. The following describes the variety of places within the study area.

AGRICULTURE

Parcels devoted to agriculture comprise almost half of the study area. In addition to cropland and pastureland, working lands include forests that are managed for timber operations. From small-scale growers focused on flowers and fresh produce to larger establishments that produce soybeans and hay, farmers in this part of Chatham County contribute to the local economy while maintaining a thriving ecosystem.



Flowers are among the products of local agriculture.



COMMERCIAL DESTINATIONS

Commercial development in the study area is nearly indiscernible on the Existing Land Use Map. The businesses in this category are generally small convenience retail stores and gas stations situated in the US-1 corridor where road access and visibility ensure a steady stream of patrons. Other commercial uses include artists' studios, small-scale production shops (e.g., cabinet makers), veterinary clinics, small engine repair businesses, and wedding venues. Lodging is available in the form of inns, bed-and-breakfasts, vacation rentals, and campgrounds for recreational vehicles.

Convenient stores are located along Old US-1 and close to US-1.



INDUSTRIAL CONCENTRATIONS

Major industrial development is concentrated in two parts of the study area. In the north near Pittsboro is a quarry operated by Luck Stone Corporation and one of 3M's plants. Drawn to the US-1 corridor for the highway and rail access, several industrial operations have located in the southern half of the study area. Among them are Triangle Brick and General Shale Brick. Triangle Brick opened its Merry Oaks facility (near Exit 84 along US-1) in 1991 and, with one of the largest kilns ever built in the US as well as an automated manufacturing process, the plant produces 240 million bricks annually.



NEIGHBORHOODS

Most of the residential units in the study area are situated on large parcels that are not part of neighborhood. However, over the last 50+ years, subdivisions with lots ranging in size from one acre to more than 10 acres have been developed on the north side of US-1. Many of these lots accommodate large homes that differ from the houses in the neighborhood in Moncure's historic center, where the typical lot size is half an acre. The campgrounds have satisfied some demand for temporary housing for workers at the Shearon Harris Nuclear Plant.



A home in Moncure (Source: Zillow)

COMMUNITY FACILITIES & AMENITIES

Parks managed by the State are located at the edges of the study area and along the waterways. They provide a range of recreational opportunities for residents but are also destinations for tourists seeking places to boat, fish, kayak, swim, and camp. Civic and institutional uses complement the many uses in the study area. Many are part of Moncure's historic center while others are dispersed throughout the study area. Some of the key facilities in the study area include the following:

- Moncure School – This school has served the Moncure community with public education for generations. Today, the school has an enrollment of almost 250 students and offers instruction for pre-kindergarten through eighth grades.
- Jordan Lake State Recreation Area – A popular destination for camping, boating, fishing, hiking, swimming, and bird watching, this NC-maintained land provides visitors access to the 14,000-acre lake. The dam and surrounding lands are managed in partnership with the U.S. Army Corps of Engineers.
- Sprott Youth Center – The gymnasium, built in 1936 on the Old Moncure School property, was renovated to support the development of the youth in the community through academics, health education, athletics, and fellowship activities.

Churches in the community are central to civic life. While some residents in the area come together through faith, many are united in their appreciation for the natural environment. Both are key components of the study area



A paddler observing an eagle at the edge of Jordan Lake. (Source: Zillow)



Projections

The projections that follow attempt to incorporate existing population and development trends as well as the major job creation announcement from VinFast.

HOUSING DEMAND

As part of the growing Triangle region, Chatham County is estimated to need 685 new housing units per year based on population trends. The sparsely-populated study area is projected to see only modest demand, or approximately 34 new units per year. However, VinFast job creation numbers could dramatically change that, even if a small percentage of workers live in Chatham. Over the first seven years of hiring, VinFast could create demand for another 428 housing units per year in southeastern Chatham. Pittsboro, particularly Chatham Park, could accommodate some of that. A wider range of housing types than currently exists would be needed to fit the budgets of mid-wage earners.

Table 2. Potential Housing Demand by Type, Southeastern Chatham County

Type	% of Total Demand	Annual Demand (# of units)
Single-Family	50%	173
Townhomes	20-25%	69 to 87
Apartments	25-30%	87 to 104

Several housing types that are not common or not present in the study area today can be supported by the market in the upcoming decades. They are single-family detached homes (including some on smaller lots), townhomes, and apartments.



RETAIL DEMAND

Physical retail spaces in the U.S. weathered the storm of rising online shopping, but future construction will likely be cautious.

Since retail “follows the rooftops,” meaning it goes to where homes and residents are already locating, little new retail would be expected in the mostly rural Moncure area. The addition of more small, stand-alone stores (i.e., a gas/convenience mart) is likely. However, new housing developed as part of larger residential or mixed-use communities could generate demand for a greater amount of new retail space.

OFFICE DEMAND

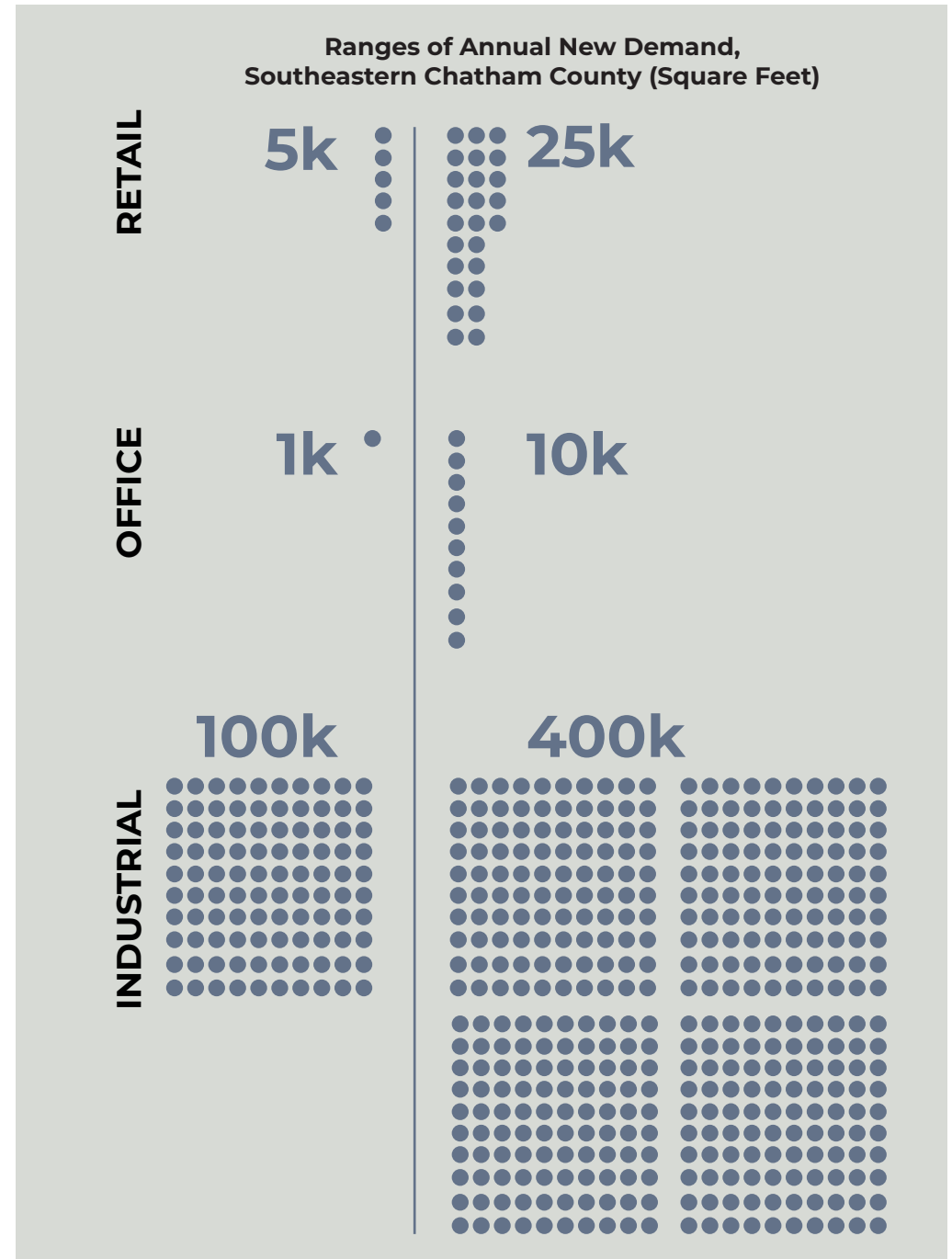
A slow return to the office due to the surge in remote working and hybrid work arrangements has led to record-high office vacancy in the U.S. New construction is slowing and will likely be limited to the more proven locations in the region.

Industrial projects, like VinFast, could spur a small amount of office demand. If new mixed-use neighborhoods are developed nearby, more office uses could locate there.

INDUSTRIAL DEMAND

America's industrial and warehouse markets have been booming for years, with record levels of demand and new construction. The pace of development is expected to slow significantly throughout 2023 due to concerns about a weakening economy and the rising cost of loans and rising interest rates.

Nearby industrial markets in southern Wake County & Lee County are small, and past trends would not suggest a great deal of demand in southeastern Chatham. However, the new facilities for FedEx, Wolfspeed, and VinFast as well as successful leasing of large new buildings in Sanford indicate that the US-1 corridor is gaining ground as a recognized location for manufacturing and distribution.



III. PLANNING PROCESS SUMMARY

Planning with, not for, the Community

Decisions that result in change in any community are made by a variety of entities operating at the Federal, State, regional, and local levels and private sector investors. Chatham County leaders have opportunities to influence some of those decisions, such as private investment and the timing of related development activity. Only a few types of development-related decisions are completely within the County's control, including the countywide tax rate, local plans and policies, and local land development regulations (zoning and development standards).

Planning for the future provides an opportunity to manage change in accordance with community expectations and aspirations, giving the community a voice to influence the direction of future development that could occur in the next decade or more.

KEY QUESTIONS TO BE ANSWERED BY THE PROCESS

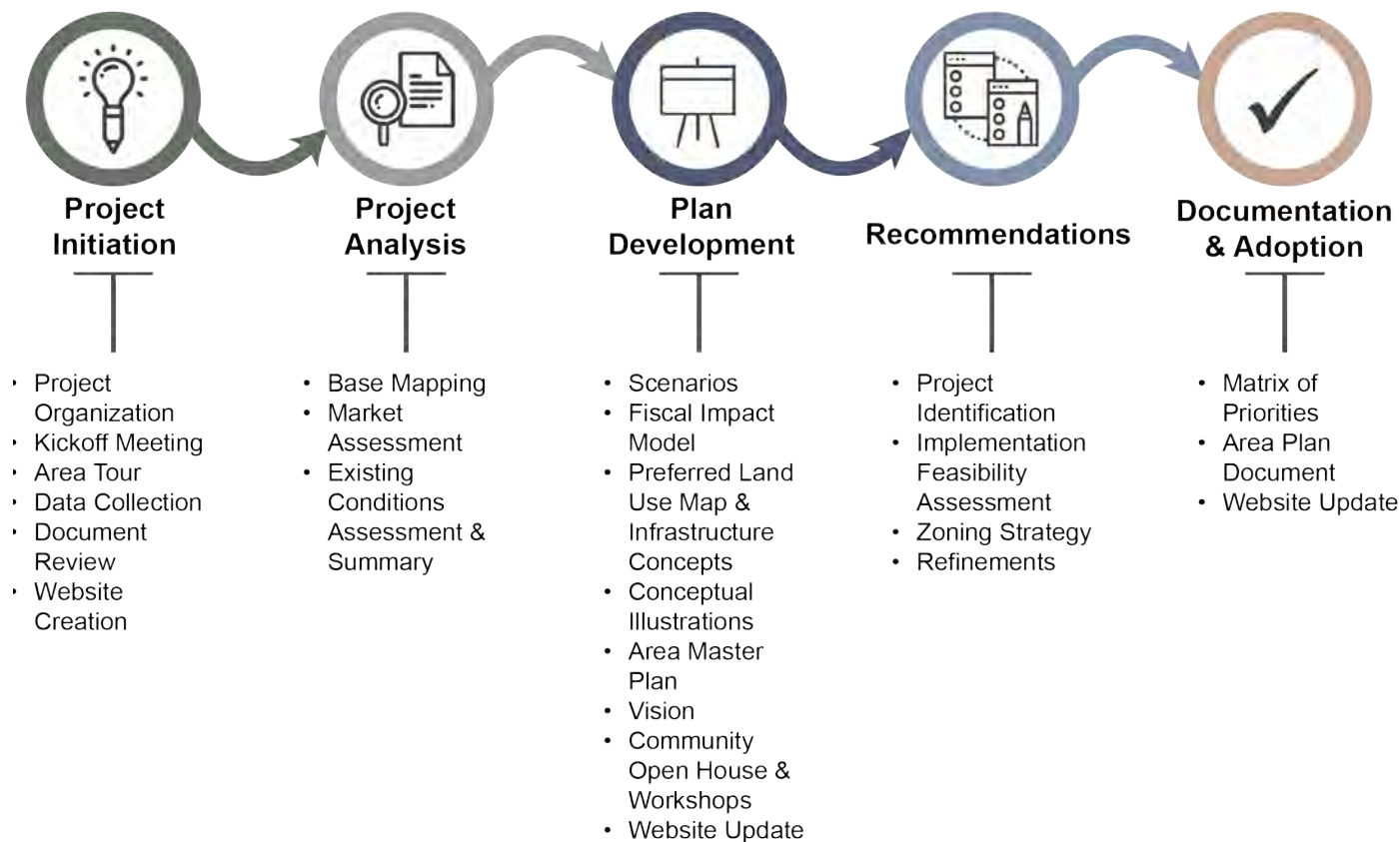
The planning process was designed to address a set of questions posed by the Board of Commissioners, including the following:

- » How much development can the area support?
- » With the changes that are already underway, is there an outcome that is suitable given the unique assets that define the place today, the community's interest and desires for the future, and the opportunities for economic growth that could benefit the County and the region?
- » To what extent is land development limited by environmental conditions?
- » How can we overcome barriers to the changes the community desires?
- » Are there new County infrastructure systems and services that will be needed to accommodate projected growth?
- » What can/should the County expect from future private investments to ensure the changes in the area optimize the benefits?
- » What are the lessons learned from similar communities with similar projects?

The Project Stages

The planning process was conducted over an eight-month period. After initiating the project with data collection and examining the existing conditions of the study area, the project team worked with the community to explore the options for future development and conservation. The first three steps helped the community arrive at a "preferred vision for the future." The latter stages were devoted to recommendations in support of the vision. The resulting plan define the steps to realizing the vision through implementation activities.

Figure X. Stages of the Planning Process



"Respect for the people and the natural resources of the area are very important. Help for people who have been here for generations should be available. Taking their land should not happen."

-- Survey response

Community Engagement Program

The Plan Moncure project is designed to build a shared vision for how land will be used in the greater Moncure area in the years ahead. The resulting plan document will help guide County policy, development regulations, and public investment for this part of Chatham County.

The planning process is intended to give community stakeholders a voice in shaping the future of this area as growth pressures begin to impact it. In this way, this process is different from other kinds of recent projects in the area. There is no existing small area plan for this part of the county. Instead, the plan is being created with stakeholders through this project. As a result, broad and meaningful participation is key to a successful project.

To help give the range of stakeholders an opportunity to participate in this work, the project team is using a combination of in-person and virtual engagement tools. These are described in more detail on this page.

PUBLIC MEETINGS

The project team hosted a series of community meetings to engage stakeholders. These include:

- » **February 21 at Moncure Fire Station 8:** Resident drop-in sessions (3) to hear local comments and concerns;
- » **March 21 at Moncure School:** Community Open House to introduce the project to the community and get initial input on what people like about the community today, and what they'd like to see in the years ahead;
- » **April 27 at Moncure School:** Community Meeting to hear opportunities and concerns from community stakeholders and get initial input on different conservation and development scenarios to study as part of the project;
- » **May 24 at Moncure School:** Community Open House #2 to share results of scenario planning analysis and receive feedback on preferred scenario features from stakeholders;
- » **August 9 at Sprott Center:** Community Open House #3 to share draft of Plan Moncure, including vision map and implementation measures, and receive stakeholder feedback.

Community Open House #1 held at the Moncure School on March 21st hosted 163 residents, property owners, and other stakeholders. Two presentations were complemented by topic-specific information stations.



By the Numbers...

2,360
Visitors

Plan Moncure Website
(through 5/31/23)

75
Attendees

3 Resident Drop-In Sessions
at Moncure Fire Station 8
(2/21/23)

163
Attendees

Community Open House #1
at Moncure School
(3/21/23)

90
Attendees

Community Listening Session
at Moncure School
(4/27/23)

75
Attendees

Community Open House #2
at Moncure School
(5/24/23)

35
Attendees

Pop-Up Table
Spring Around the Loop Street
Fair (4/15/23)

25
Attendees

**Scenario Planning Online
Session**
(6/1/23)

Tbd

Community Open House #3
at Sprott Center
(8/9/23)

POP-UP EVENTS

The project hosted a table at a community event to help engage stakeholders by bringing the project to them. The event was Spring Around the Loop Street Fair at Haywood on April 15.

WEBSITE

The project includes a website that is updated regularly to provide information on the project, advertise upcoming community outreach events, and provide opportunities for public comment.

SHARE-A-PHOTO

To help engage stakeholders in sharing the places they love in the Moncure area, the project includes a special website where people can submit a photo of a favorite place and why they love it.

SCENARIO PLANNING ONLINE SESSION

To share more details and answer questions about the scenario planning process, the project team held a deep dive session online for interested stakeholders.

PROJECT KIOSK

Chatham County Planning Staff have constructed an outdoor kiosk at the Moncure Collection Center at 2855 Old US-1 with updated information about the project and a comment box to submit questions and input.

SURVEY

For stakeholders who may not have been able to attend some of the in-person meetings, the project has conducted an online survey. To date, nearly 150 responses have been received.

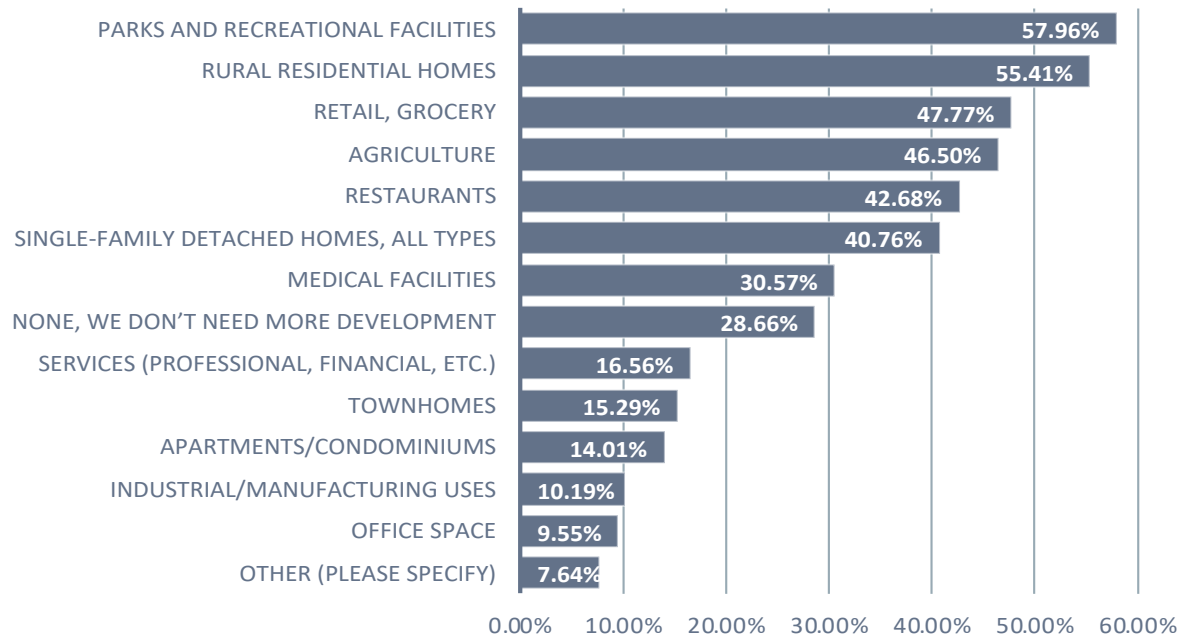
INTERVIEWS / FOCUS GROUPS

To get more detailed information on comments and concerns, as well as input and feedback on proposed public engagement methods, the project team has conducted a series of interviews and focus groups with community leaders.

Topics of Input Received

There are a number of themes from public input provided to date by community stakeholders. These include the following, along with sample comments that are representative:

In the future, what types of uses should the County encourage?



A community survey helped shed light on the types of features and activities of Moncure that residents and property owners truly value. The survey also revealed interest in certain land uses. The question regarding the uses residents desire in the future indicated a strong preference for rural residential housing, single family detached housing, retail (grocery), restaurants, parks, and agriculture.

RURAL LANDSCAPE AND LIFESTYLE

- Small country roads, scenic farmland, natural forests and wildlife habitation, clear streams and farm ponds, bird calls, fresh air
- Keep the natural beauty and wildlife it contains!
- I want to still be able to hunt on my land.
- People moved to Moncure for peace and quiet, keep it small with small communities (Corinth Area/ Buckhorn Road)
- The open space and "quiet life"
- Keep the rural tranquility of Moncure.
- Leave Moncure as it is!



SHOPPING / SERVICES

- Retail Stores, Grocery Stores/ Farmers Market
- Schools and Daycare are a primary need.
- Bring in a gas station with a fast food restaurant, drug store or Walmart
- Planned commercial development
- Restaurant would be great
- Aldi or Lidl grocery store along old US-1
- Add quality grocery store, gas station, and pharmacy.
- We need a grocery store
- Businesses could spring up around small business encouraged to support rural and farming pursuits. THAT would make us unique.

PREFERRED DEVELOPMENT FEATURES

- Preservation of a lot of existing vegetation
- Good architectural design
- Building construction that lasts for decades
- Walkable development

ENVIRONMENT

- Partin Creek
- We have a beautiful landscape of trees, wildlife, the lake, etc.
- There is a parcel of land supposedly purchased by Tim Sweeney that would connect the Jordan Lake protected lands with the Deep River State Park area.
- McKay Island in the Haw River
- Shaddox Creek
- Concerned about the runoff [from a proposed] development
- What about PFAS?
- East River Road area, keep in conservation and do not develop.
- I want to be able to still hear the owls at night, for me that is what makes this feel like Moncure.



"more food/grocery options (locally owned)"



"good architectural design"



AGING IN PLACE

- Elderly people who can't attend and not represented, living off social security and can barely afford things now it will only get worse for them. Any assistance/programs for elderly?
- Just purchased private property to live the rest of their lives here, don't take it.
- Senior center

INDUSTRY / JOBS

- Save agriculture areas in all Moncure
- Preserve forestry
- The MEGASITE has destroyed the Moncure we knew and loved all of our lives

UTILITIES

- No sewer beyond Corinth.
- Public water supply
- Public utilities and trash pick up company
- It is extremely disappointing that the county only plans to extend water, sewer, and broadband services directly to specific new manufacturing sites, bypassing current residents and also limiting potential development of more desirable features in our community such as small businesses on smaller plots of land, apartments, or other affordable housing

"Any assistance programs for elderly?"



"Save agriculture areas in Moncure"



"public water supply"

BROADBAND

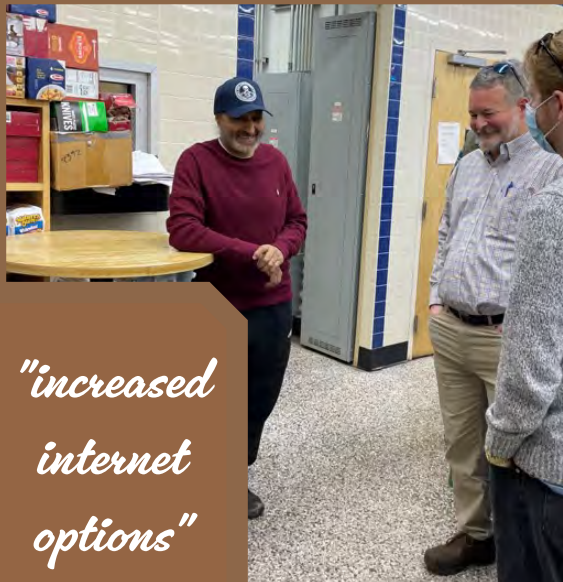
- High Speed Internet doesn't go past Corinth. Needs expanded.
- It would be nice if we had reliable fast internet.
- Increased internet options
- Need high speed internet
- Retain rural character while bringing in modern services like

COMMUNITY FACILITIES

- Larger school with public access to sports fields/tennis courts/ etc.
- Sports complexes
- Better schools, senior services
- Have a park and recreation place for kids.

TAXES / PROPERTY VALUE

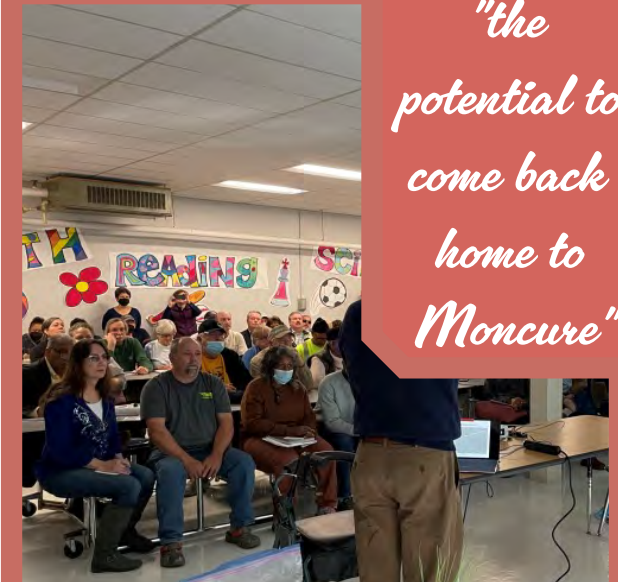
- Taxes from the folks in Moncure should be going towards services in Moncure
- Planned Moncure Flatwood Road - owns small family business, family land. What effects will this development have on tax value?
- If all these expensive houses are going to come in and push us (locals) out - please set up a special tax base. I want to be able to stay in my childhood home all my life and not be thrown out into the street



"increased internet options"



"park and recreation place for kids"



"the potential to come back home to Moncure"

IV. THE VISION FOR MONCURE

Bringing the Vision into Focus

The primary objective of the plan development stage was to determine the appropriate land use and conservation pattern and depict that in the “Future Land Use & Conservation Map” (Refer to the “Vision Map” on page 30). Through the process, the community expressed ideas for change that could enhance the quality of life in Moncure. These ideas were tempered with comments about conserving the features that define the Moncure area and the way of life that residents have enjoyed for decades. Arriving at a shared vision for the future required an examination of multiple options so the community could evaluate trade-offs and determine the best path forward.

ROOM TO GROW

An important question to answer in developing the vision for the future is, “Where can all the growth (i.e., new homes, new businesses, and additional support services) that is coming to the area be located?” Therefore, an early step in the process is mapping the development status to determine which parcels make up the “land supply,” or the places where growth may go.

The study area is comprised of 67,356 acres. Some of that land (12%) is already developed and not likely to redevelop. Another 29% is protected through conservation easements and other land protection mechanisms. The remaining land is either undeveloped or underdeveloped. The land supply is comprised of these two areas, which combined encompass 35,907 acres.

Using the Land Supply Map

The Development Status Map maps the distribution of these categories of development status. The status of parcels in the study area can

UNDEVELOPED

With few or no structures, parcels of land remain vacant or relatively undeveloped. (Note: These parcels include agricultural lands that are managed for timber, cultivated fields, and pastureland.)

PROTECTED

Parcels of land are protected as public parkland, privately-owned conservation easements, etc. (Refer to the Managed Land on the Study Area Map.)

UNDERDEVELOPED

The level of investment is low and the property is therefore ripe for redevelopment.

DEVELOPED

The level of investment is high and such parcels are not likely to redevelop over the next 20 years.

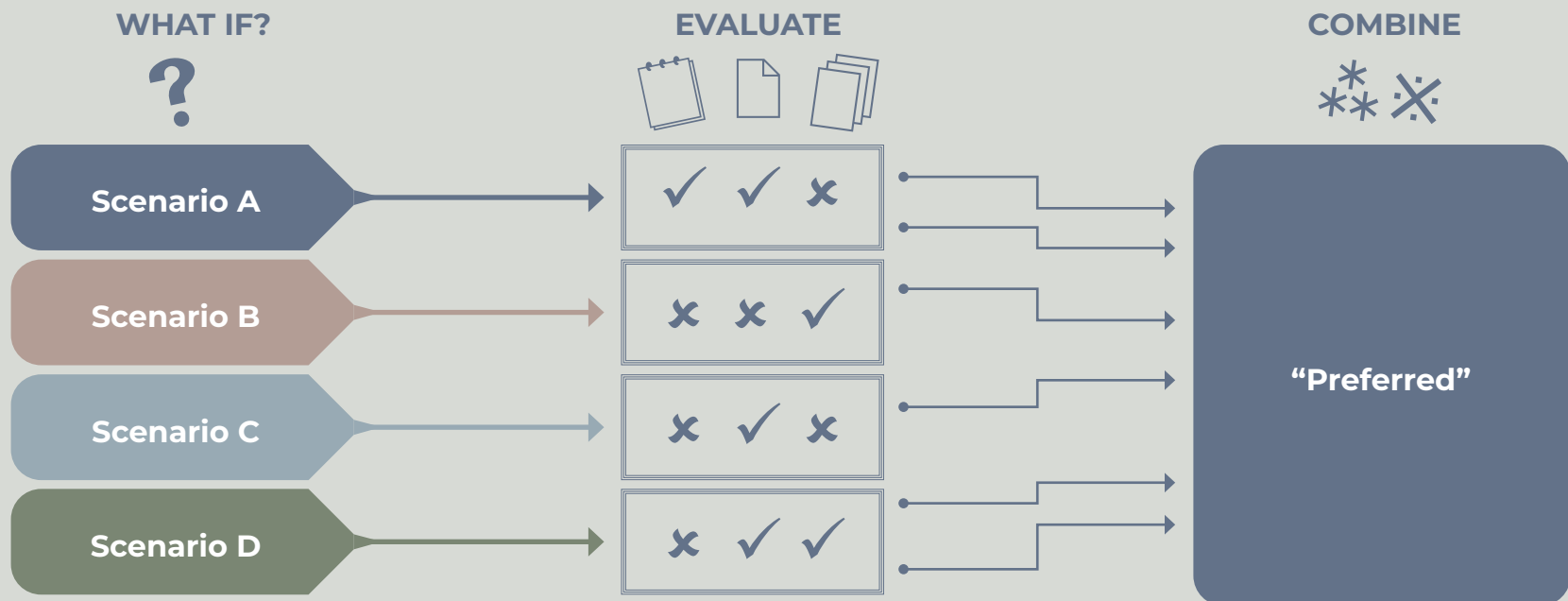
The suitability of land refers to the capacity of land to support a type of land use. This is based on various attributes, such as availability of infrastructure, access, parcel size, topography, environmental conditions, and proximity to other uses. All such factors make a parcel more or less attractive for future development. Some of the land that comprises Moncure's land supply is better suited to some uses than others. Through a suitability analysis, a realistic delineation of areas that can support future development was determined. Refer to Appendix E: Suitability Maps.

PUBLIC REVIEW DRAFT - AUGUST 9, 2023

Community Choices: Using the Scenario Planning Tool

The project team employed a technique referred to as “Scenario Planning” to present options for the future of Moncure. Scenario planning is a process that considers multiple possibilities for future development and conservation for a given area based on a variety of factors. Scenarios are based on community desires and describe what might occur, taking into consideration physical features, environmental constraints, infrastructure investments, market realities, emerging trends and opportunities, and other factors. Scenarios contemplated are not forecasts or predictions. They enable the community to make informed choices. The essential requirement for any scenario is that it be plausible, within the realm of what exists today, or what could be in the future.

Figure X. Scenario-Planning-in-Concept Diagram



The four scenarios presented for Moncure reflect the range of preferences expressed by the community while being mindful of opportunities and constraints, such as infrastructure availability and environmentally sensitive conditions. Though the assumptions and key features of each vary, all the options considered suggest an approach to growth management to accomplish the following: balance competing interests, manage change for the benefit of the Moncure area residents and property owners (present and future), and minimize the impacts of change that are likely as growth continues in the region. (For more information about the four scenarios, refer to Appendix D: Summary of Scenarios.)

- The evaluation of the scenarios by the community revealed that the community would generally be in favor of the following:
- Modifications to current zoning, as the amount of by-right development that is possible is not consistent with the rural pattern that defines Moncure today.
- A departure from the *Plan Chatham* (the Moncure portion of the adopted map), which precludes some of the types of development and amenities (i.e., parks) the community desires.
- The promotion of land conservation and low-density development (including large-lot subdivisions).

Measuring Trade-Offs

The results of scenario planning exercises help residents and property owners choose the future that meets their expectations. These choices are made with an awareness of potential changes in the current development pattern in return for desired community benefits. By quantifying the potential impacts of each scenario, it is easier to compare the options, understand the trade-offs, and make informed choices about the future of the area.

	2022	2040 est.		2022	2040 est.
	11 Police Officers	+17 Police Officers Needed		76:24 Assessed Value Ratio of Res:Non-Res	69:31 Projected Assessed Value Ratio of Res:Non-Res
	11 Full-Time Firefighters	+17 Full-Time Firefighters Needed		23% Land held for Agriculture or Woodlands	10% Land held for Agriculture or Woodlands
	145 County Park Acres Planned	+83 County Park Acres Needed		344 Dwelling Units encroaching on National Heritage Areas	+128 Dwelling Units encroaching on National Heritage Areas
	13.6 Greenway Miles	+8.0 Greenway Miles Needed		255 Acres of Impervious Surface (est.)	+542 Acres of New Impervious Surface (est.)
	8,767 CCS System Students	+1,019 Projected # of CCS Students from Moncure Area		\$604/DU \$0.06/NRSF Net Annual Ad Valorem Tax Revenue	\$483/DU \$0.46/NRSF Net Annual Ad Valorem Tax Revenue

The Vision Map

The “Vision” for the future of Moncure is expressed in terms of goals and objectives outlined in Plan Chatham, the County’s comprehensive plan, as well as the Future Land Use & Conservation Map (See next page). In support of the goals and objectives, the map depicts an arrangement of places that are a reflection of the types of development and conservation areas the community desires in the future. The map represents the long-term “preferred” vision the community has for the future and refined with assistance from the Technical Advisory Committee. It depicts the build-out condition.

BIG IDEAS



The big ideas that were developed through the process range from ways to conserve the natural and cultural assets as well as support the sensitive integration of commercial, recreational, and service uses to meet the needs of the population.

Industrial development is confined to the areas south of US-1 that are already zoned for industrial uses, and additional employment opportunities are supported on surrounding sites.

The rural lifestyle and character is maintained through low-density development, and development pressure on such properties is reduced as much of the demand is accommodated on sites close to US-1.

Development that is coming to the area is directed toward and concentrated in nodes along and within the US-1 corridor.

Places for grocery stores, pharmacies, shops, restaurants, and services the community desires are accommodated in mixed-use development near US-1 interchanges. In these locations, easy access and many new residents living in close proximity ensure viability.

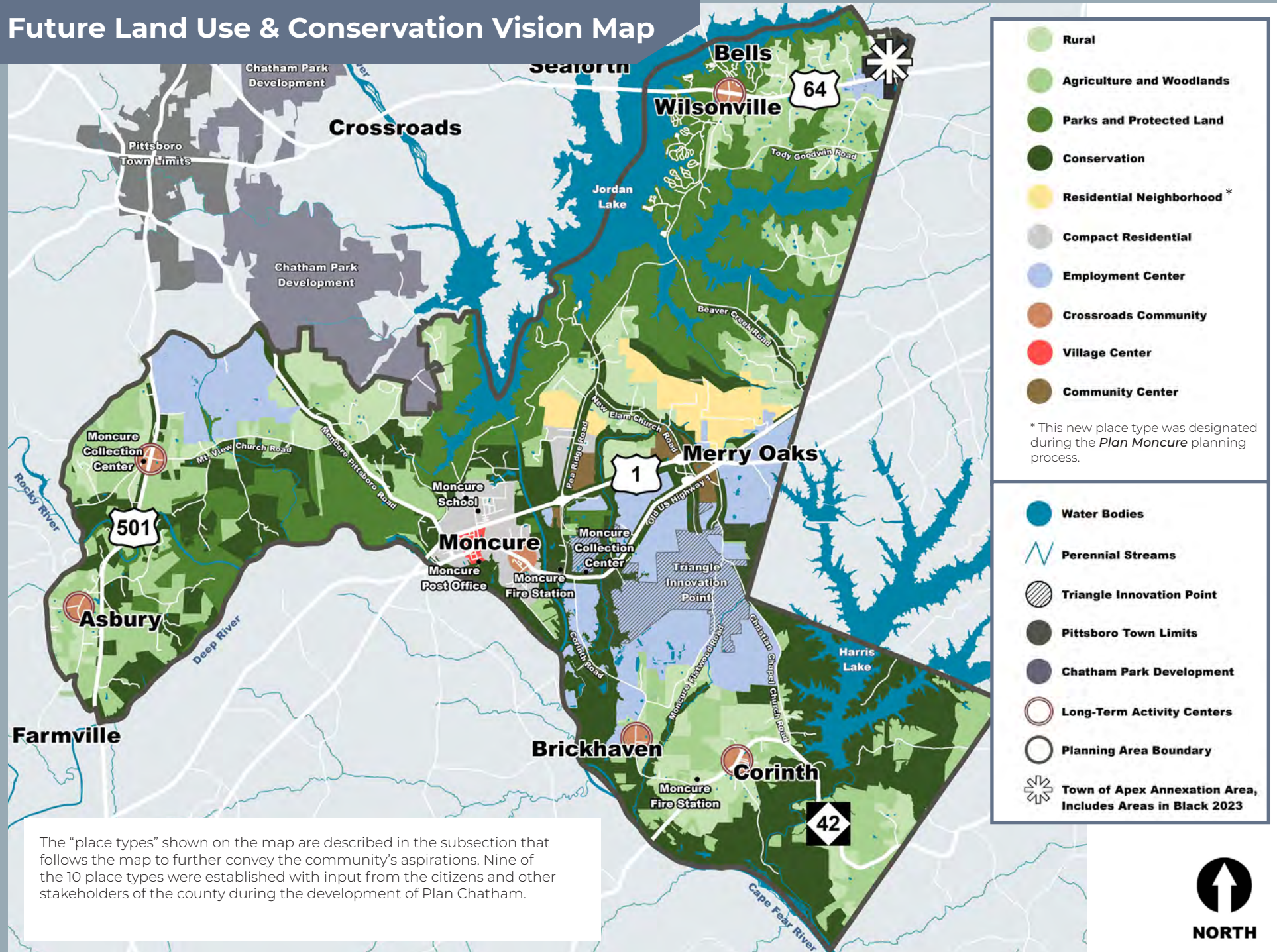
Historic and cultural assets are respected, as change occurring around them is done in a manner that enhances and revitalizes these places.

Open space is accomplished through a concerted effort to conserve areas with valuable natural resources and the promotion of improved green spaces in new development.

USING THE VISION MAP

The map is meant to provide a framework for future land use decisions, and as such, supports written policies and offers additional guidance with respect to the application of land development regulations (i.e., zoning and subdivision), the provision of services, and the prioritization of capital investments in support of the future development pattern. Reflective of citizens’ and stakeholders’ expectations, this proposed pattern..

Future Land Use & Conservation Vision Map



The Place Types

WHAT ARE THEY?

Place Types are classifications of development and conservation. The use of such classifications instead of land use categories is a modernized approach to describing existing and future development and distinguishing each area from others. In addition to land use, each place type can be described in terms of scale and density of development (lot sizes, building heights, and building setbacks). Street types, connectivity, and resulting block patterns are sometimes noted to describe the circulation networks for various modes of transportation to be supported in each area. Since open space is a key component of any development pattern, the appropriate amount as well as the variety of types defined by purpose, size, typical location, and level of improvement (a formal green versus a natural area) may also be specified.

PLACE TYPES VS. ZONING DISTRICTS

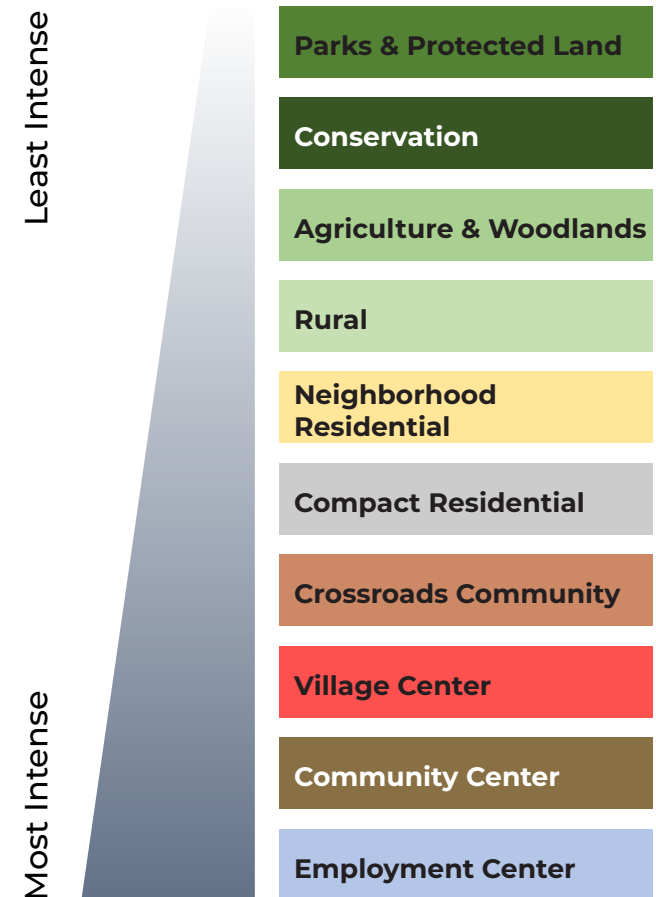
Place Types and Zoning Districts are not the same. In fact, more than one zoning district could be appropriate for area designated for a single place type. Refer to the Zoning Strategy presented in Section VI.

DID YOU KNOW?

A common point of confusion is the difference between a land use map and a zoning map. The distinction is an important one. To be clear, land use plans, such as *Plan Moncure*, are policy guides. They do not have the force of law. Plans establish a vision for the future that is reflective of community expectations. The "vision" is represented by a land use map that shows the future development pattern. Plans are implemented through a variety of tools. One of those tools is the zoning ordinance, which does have the force of law. Zoning puts into place the rules to be followed as property is developed or redeveloped. Such rules should be consistent with the intent of the adopted plan. The official zoning map depicts the zoning districts to delineate the areas where the rules apply.

For more about the details of the place types, see [pages 46-49](#) for place types in *Plan Chatham*.

The range of Place Types generally increase in intensity. The diagram below shows the relative differences across the Place Types shown on the Vision Map and explained in this pages that follow.



Parks & Protected Lands



Permanently protected lands, these areas are composed of federal- and state-maintained recreation areas parkland, as well as privately owned land protected by conservation easements. The mix of uses includes passive and active recreation uses, accessory uses, and limited residential uses (per easement agreements).

Conservation



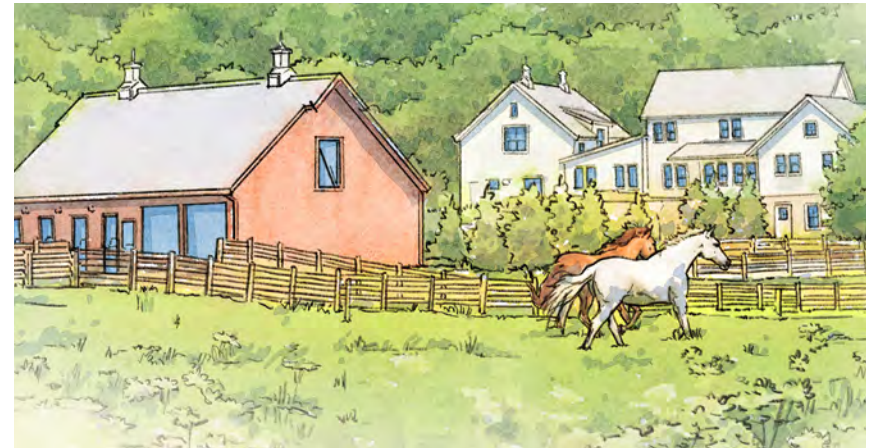
Areas with concentrations of natural assets. (Note: They were delineated previously through a GIS-based analysis that utilized data from the Chatham County Comprehensive Conservation Plan and the North Carolina Conservation Planning Tool.)

Agriculture & Woodlands



The location of large-scale working farms and timberlands, this area is comprised of intensive, highly productive operations. The mix of uses includes large-scale agriculture, related processing facilities, supporting commercial and service uses, and single-family homes associated with the farms (housing the owners and managers of the agricultural operations).

Rural



Low density development comprised of single-family homes on large lots or in conservation subdivisions as well as some commercial buildings designed to protect function and form of rural character. Pastures, farms, and forests dominate the landscape. The mix of uses includes agriculture, large lot residential, supporting service uses, and home-based & small-scale businesses.

Neighborhood Residential



Detached residential units complemented by a variety of open spaces that are connected to the larger system of green space in the area. Neighborhood amenities, recreational facilities, schools, and churches may be part of the fabric. Here, the average lot size is one to two acres.

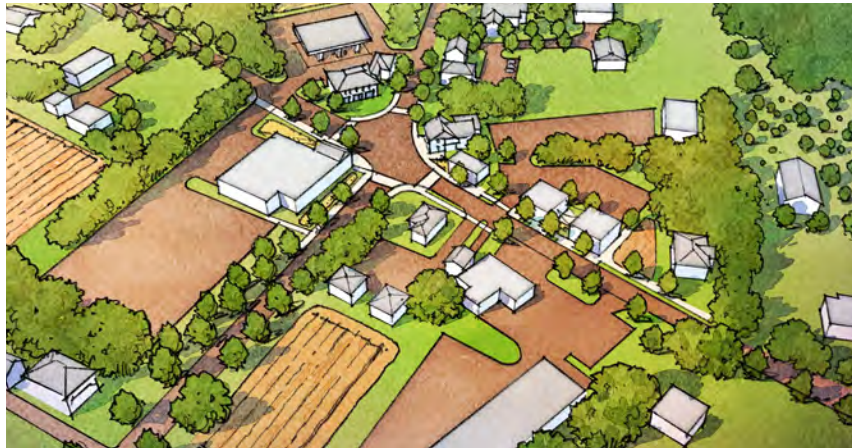
Note: This new place type was designated in response to community feedback received. The Neighborhood Residential place type addresses the desire for an intermediate category, suggesting more density than Rural but not as dense as Compact Residential.

Compact Residential



Detached residential units complemented by a variety of open spaces that offset the smaller sizes of private yards. Community centers, amenities, recreational uses, schools, and churches may be part of the fabric. Here, the average lot size is smaller than that of other residential place types. Proximity to the historic heart of Moncure or new centers places residents of neighborhoods in this place type within a reasonable walking or biking distance of local shops and dining.

Crossroads Community



These communities are within rural areas. The mix of uses includes agriculture support services, limited supporting retail, and some single-family residential and institutional uses. Residential uses are designed in a context-sensitive manner in keeping with historic development patterns, which may include smaller lot sizes and setbacks than typical rural and suburban development..

Village Center



These historic centers accommodate small-scale, local-serving uses, including retail, restaurants, services, and office uses clustered at the center and flanked by residential uses. New buildings are context-sensitive in keeping with historic development patterns. Attached products may be appropriate if designed to mimic the scale and features of single-family homes in the area. Light Industrial uses designed to have minimal impact on surrounding residential are also appropriate.

Community Center



Retail hubs located along key roadway corridors, these centers accommodate regional retail tenants complemented by local-serving commercial development. The mix of uses includes retail, restaurants, services, and office uses. Residential uses can include single family homes, patio/cottage homes, attached units, and multifamily units.

Employment Center



These centers are targeted for future job-generating uses in settings that meet today's workplace expectations. The mix of uses includes industrial, office, and supporting retail, restaurant, service, recreation, and other uses.

Conceptual Plans

DEMONSTRATING PLACE TYPES

Three places within the Study Area were selected for further study to demonstrate the intent of the Place Types when applied to the specific locations. Each illustration presented on the pages that follow is conceptual. Each represents one of several possibilities for future development and conservation, as there are many ways to achieve desired results. .

A Heart of Moncure

The heart of Moncure is becoming the focus of revitalization efforts that could bring a new level of energy to this historic center that has suffered from disinvestment.

B Pea Ridge Road

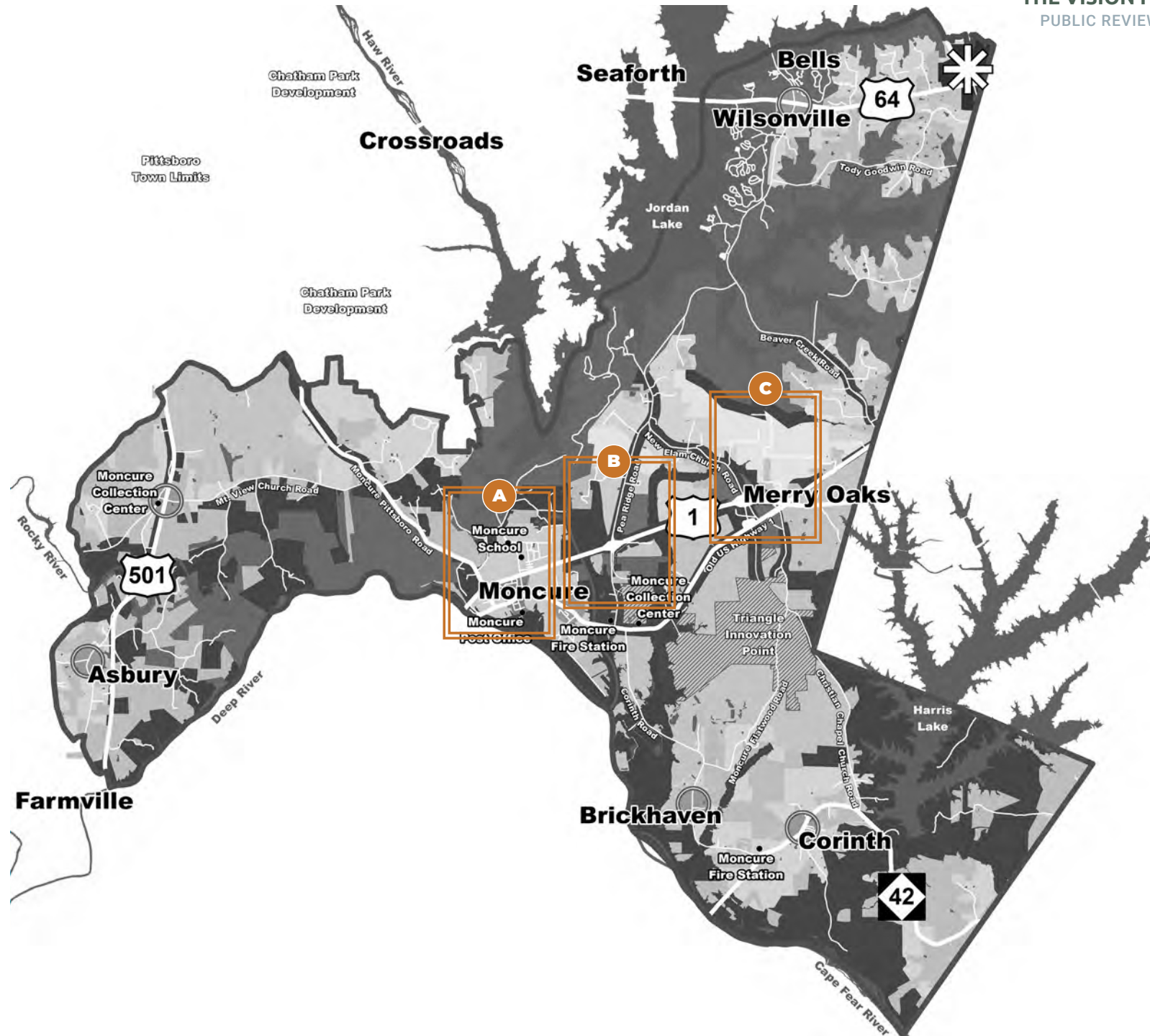
As a key point of entry into the Moncure area, the Pea Ridge Road interchange will likely draw development. Locating a mix of uses in a well organized, pedestrian-scaled center flanked by housing could reduce pressure for development in the more rural places in the area.

C New Elam Church Road

This is a new interchange area that provides access to TIP East. The required realignment of New Elam Church Road will change circulation patterns and open the door for new business opportunities on existing commercial sites.

DID YOU KNOW?

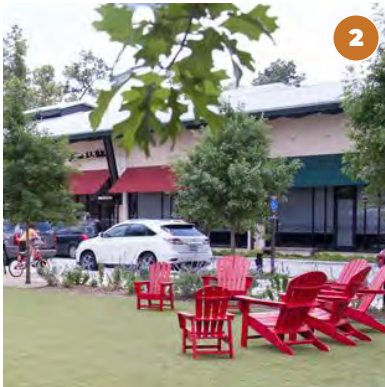
The US-1 corridor is poised for growth. Images help convey the community's expectations and effectively help manage change for outcomes that benefit the Moncure area and Chatham County.



A Heart of Moncure Area

A VIBRANT NEIGHBORHOOD:

Expanding the development footprint of Moncure's center opens the door to a variety of housing types that complement existing residences, provide more housing choices, and achieve a critical mass needed to bolster the revitalization of Moncure.



CIVIC CENTER: The Sprott Center is one of a limited number of community facilities enjoyed by residents. Elevating its importance with a civic green reinforces this area as the civic center of Moncure while providing a fitting front door and additional space for programming (i.e., recreational activities, community gatherings, etc.)

GREENWAY/BUEWAY SYSTEM:

The adopted Parks & Recreation Master Plan calls for a connected network of greenways and blueways as well as access point for each. A park that offers boat launch and other facilities could connect to other destinations in the community via a trail loop. Together, they would expand recreation and enhance the quality of life in the historic center.

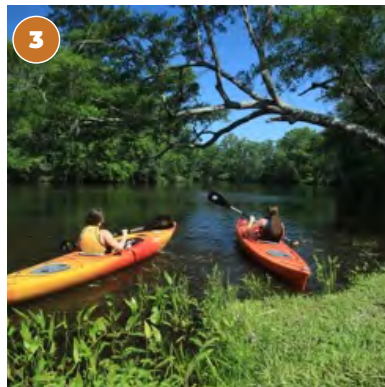
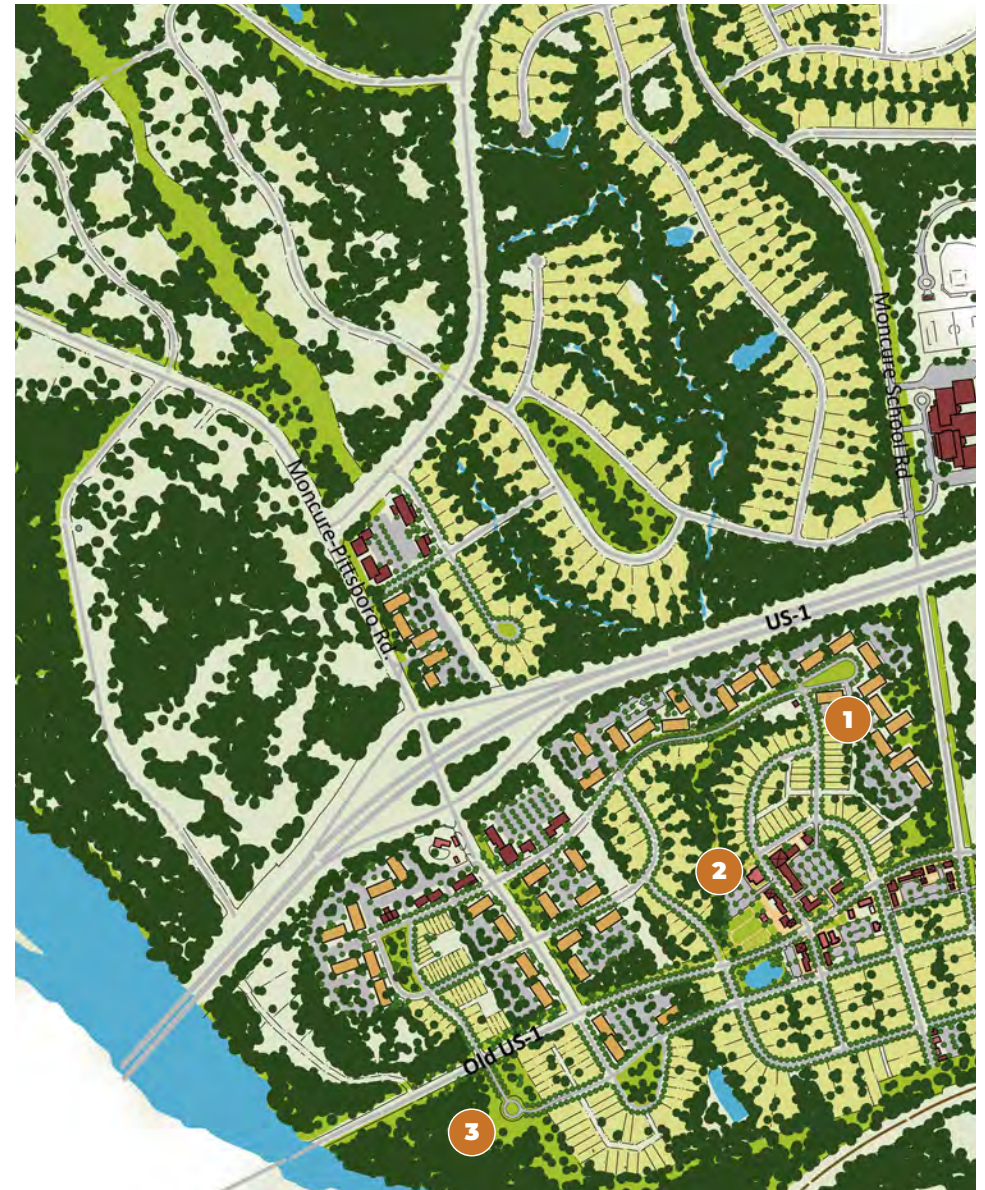


Figure X. The Heart of Moncure Concept

The heart of Moncure is becoming the focus of revitalization efforts that could bring a new level of energy to this historic center that has suffered from disinvestment.



Heart of Moncure Area Concepts:

- 4** Create a central civic green as a foreground to the Sprott Center and a programmable space to bring the community together.
- 5** Allow infill development that complements adjacent existing development and respects the cultural assets and character of this historic center.
- 6** Support a limited amount of small-scale commercial development within the areas accessible to the US-1 interchange along Moncure-Pittsboro Road.
- 7** Support the addition of institutional uses in the land use mix to address additional community service needs as they are identified over the next 20 years (i.e., school facilities, park and recreation facilities, community center and gathering spaces, library, etc.)
- 8** At the appropriate time, enhance or redevelop Moncure School to meet education needs of the Moncure community with modernized facilities.
- 9** Accommodate a range of housing types to expand housing choices.
- 10** Outside of the historic center, transition to the larger lots consistent with more recent subdivisions in outlying areas. The large-lot development and subdivisions that employ a conservation design approach are suitable transitions to protected open space.
- 11** Support efforts to create a greenway along the Cape Fear River.
- 12** Support efforts to create a greenway along the Haw River.
- 13** Work with property owners, developers, and utility providers to create a greenway loop. Utilize the floodplain, power line easements and rights-of-way, and building setback areas improved to become linear parks and sidepaths along roadways.
- 14** Implement plans for a park and boat launch at the designated site on US-1 where it crosses the Haw River.
- 15** Encourage conservation areas as passive recreation amenities in new development.
- 16** Maintain the vegetation along US-1 to protect the general character of the corridor between interchanges.

**CONCEPT PERSPECTIVE IMAGE
IN PROGRESS**

B Pea Ridge Road Area

SHOP, DINE, WORK, LIVE: A grocery-anchored center can be configured as a mixed-use, pedestrian friendly environment with pharmacies, restaurants, offices, and other community-focused uses. Here, daily needs can be met, and with residential units integrated, a truly viable center that suits residents of any age can be created.



AGE IN PLACE: A variety of housing types seamlessly integrated into neighborhoods that surround the mixed-use core can meet future demand for new housing and create options for multi-generational living.

A DAILY DOSE OF GREENS: New development can be enhanced with a wide variety of amenities, including green spaces in the form of greenway trails and linear parks, village greens, neighborhood playgrounds, and equestrian paddocks.

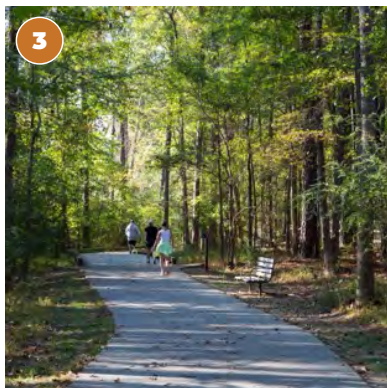


Figure X. Pea Ridge Road Concept

As a key point of entry into the Moncure area, the Pea Ridge Road interchange will likely draw development. Locating a mix of uses in a well organized, pedestrian-scaled center flanked by housing could reduce pressure for development in the more rural places in the area.

Pea Ridge Road Interchange Area Concepts:

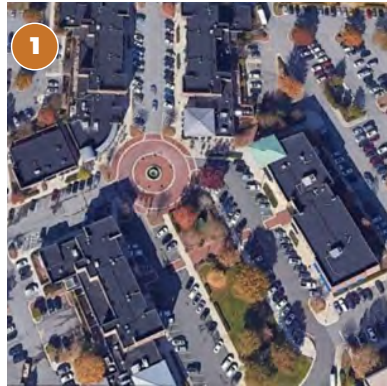
- 4** Leverage the access provided by the new interchange improvements to attract uses the community desires, such as a grocery and complementary uses that serve the local population.
- 5** Encourage development at new interchanges to integrate a mix of uses. Development should be scaled, organized, and amenitized to become pedestrian- and bike-friendly destinations flanked by housing. The concentration of nonresidential and residential uses will help create a viable business locations.
- 6** Promote positive connections between development and adjacent recreational spaces, such as Parkers Ridge Park and the planned greenway trails.
- 7** Advance efforts to create a greenway along the Haw River by encouraging open space set asides in new development that implement the trail plan, and reward developers with reductions in requirements for improved open space.
- 8** Encourage a mix of housing types to meet future demand and to enable multi-generational living.
- 9** Promote the design of industrial areas to include smaller spaces for creative entrepreneurs seeking makerspaces as well as small office uses and supporting commercial uses (i.e., food service). The structures should be organized around public amenities that enhance the viability of the businesses locating within the area.
- 10** Maintain open space and vegetation along the river corridors, which can also function as greenway corridors.
- 11** Encourage buildings fronting on large and small open space areas that are improved for a variety of uses. Open space should be a featured element in the development pattern and add value to the real estate at its edges.

**CONCEPT PERSPECTIVE IMAGE
IN PROGRESS**

C

New Elam Church Road Area

A NEW ENTRANCE: Surrounded by existing and new roadways, the center of the area can leverage the new level of accessibility and be developed to provide a broad range of region-serving commercial services. Here, the daily needs of residents, area workers, and commuters can be met in one convenient location, and transit service can be a viable option.



LOCAL SERVING BUSINESSES:

A new interchange presents opportunities for the parcels fronting on New Elam Church Road, which lend themselves to locations for new, local-serving businesses. These nonresidential uses quickly transition to residential clusters. Green spaces and other amenities are the “glue” that connects the parts together.

NOT OUT OF THE WOODS:

New development can also embrace large-lot living, where neighborhoods and the individual homes within live among the trees that are currently comprise timber operations. Transitions from this type of agriculture to new living spaces can retain some of the tree canopy.

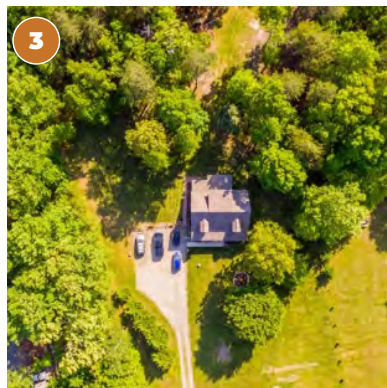


Figure X. New Elam Church Road Concept

This is a new interchange area that provides access to TIP East. The required realignment of New Elam Church Road will change circulation patterns and open the door for new business opportunities on existing commercial sites.

New Elam Church Road Area Concepts:

- 4 Preserve churches, cemeteries, and other cultural assets around which the community has evolved. Help reinforce the importance of such assets by (1) encouraging only compatible development on adjacent parcels, and (2) protecting the edges with open space and buffers that help maintaining respectful distances.
- 5 Within the area surrounded by highways, allow local- and region-serving commercial development thereby reducing development pressure for such uses on the north side of US-1.
- 6 Retain the development rights of properties fronting on New Elam Church Road, allowing commercial development that can leverage the access to US-1 that are being provided through NCDOT's modifications to the highway network.
- 7 Allow a variety of housing products in areas close to US-1, particularly multifamily and attached single-family units, where residents of such development can support and have access to locally-supported commercial uses without encroaching on existing residential areas.
- 8 Encourage a mix of housing types, including single-family homes. The variety can be achieved with a variety of subdivision approaches that could offer a high percentage of open space within new development in exchange for smaller lots.
- 9 Utilize former highway access ramps to provide additional and more direct access into neighborhoods and create local street connections to local-serving commercial development.
- 10 Work with property owners and developers to create a greenway along Shaddox Creek that can improve pedestrian and bike connections in the area as well as provide a recreational amenity for occupants of new and existing development.

**CONCEPT PERSPECTIVE IMAGE
IN PROGRESS**



The Haw River feeds Jordan Lake
(Source: Chatham County)

V. ACTION STEPS

Introduction

The history of the greater Moncure community is one of enterprise and industry – of people who went out and did things to improve their lives and the life of the community. In the same way, the purpose of **Plan Moncure** is to develop a shared vision for the future and then use it to improve the community in the years ahead. As a result, the plan includes action steps to implement the plan.

KEY QUESTIONS TO BE ANSWERED BY ACTION STEPS

In identifying these implementation measures, Plan Moncure answers two key questions:

1. What?

- » What will Chatham County, working with public and private sector partners, do to implement the shared vision expressed in Plan Moncure?

2. How?

- » How will they do it?

The answer to the first question flows directly from the public input received during the planning process. As a result, the implementation measures called for in the plan have been organized into twelve categories to help stakeholders see how their input about the things they value and what they want to see moving forward have shaped the plan. These 12 themes or action steps are displayed in a graphic showing the overall Implementation Strategy for the plan on page 51.

The second question is answered by the supporting strategies, which provide the direction needed to move forward and make progress on the 12 themes. The strategies are presented under each theme in the pages that follow.

Local Government Toolbox

To identify these projects, the *Plan Moncure* project team looked through the local government toolbox of implementation measures available in North Carolina. This includes the categories of tools pictured below.

In crafting the resulting portfolio of implementation projects, the team worked to create a set of measures that is both impactful and achievable. It includes both smaller, often easier, projects, and larger, often more difficult, projects. In addition, the project team sorted the various projects by implementation timeframe, grouping them into three categories: Short Term, Medium Term, and Long Term. A separate implementation table adopted at the same time as the plan lists the Short-Term Projects, with information about each one to help Chatham County move forward with implementation in a timely and effective manner. All of these projects are drawn from the full list included in the plan.

The result of this work is a dynamic collection of projects that will enable Chatham County and the greater Moncure community to work systematically and collaboratively in the years ahead to advance the shared community vision.

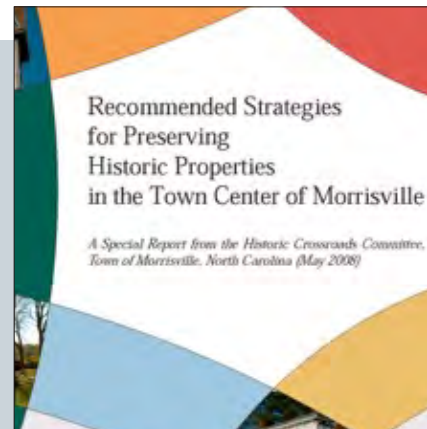
DEVELOPMENT STANDARDS

TOWN CENTER COMMERCIAL (TCC) DISTRICT			
A. Purpose			
The Town Center Commercial District along Morrisville-Carpenter Road, Chapel Hill, and other corridors and gateways into the Town Center accommodates a mix of office and service, institutional, cultural/public, and entertainment developments that respond to regional needs and are sensitively designed to reflect a positive image of the district also accommodates higher-density residential and live/work uses. District encourages pedestrian-scale retail development and the integration of outdoor space, provide opportunities for residents to walk to meet some of their daily service, with open space needs.			
B. Principal Intensity and Dimensional Standards			
The following table lists the principal intensity and dimensional standards for the Town Center Commercial District. The standards are presented in a table format. The standards are presented in a table format. The standards are presented in a table format.			
	Single-Family Attached Dwellings	Multifamily Dwellings	Other Uses
Lot Standards			
Max. Net Lot Area (sf)	n/a	20,000	20,000
Min. Lot Width (ft)	20	100	150
Max. Net Density (du/acre)	n/a	n/a	n/a
Max. Floor Area Ratio (FAR)	n/a	n/a	0.75
Max. Lot Coverage (%)	70	65	65
Setbacks			

PUBLIC INVESTMENTS



FOLLOW-UP STUDIES & PLANS



PROGRAMS & POLICIES



Implementation Strategy



THEME 1

Improve communication and coordination



THEME 2

Protect rural character and rural lifestyle



THEME 4

Provide needed community facilities and services



THEME 7

Maintain affordability



THEME 9

Enhance historic villages, create walkable downtown



THEME 11

Protect historic resources



THEME 3

Protect natural resources



THEME 5

Provide needed recreational amenities



THEME 6

Add important community-serving infrastructure



THEME 8

Support desired land uses and development amenities



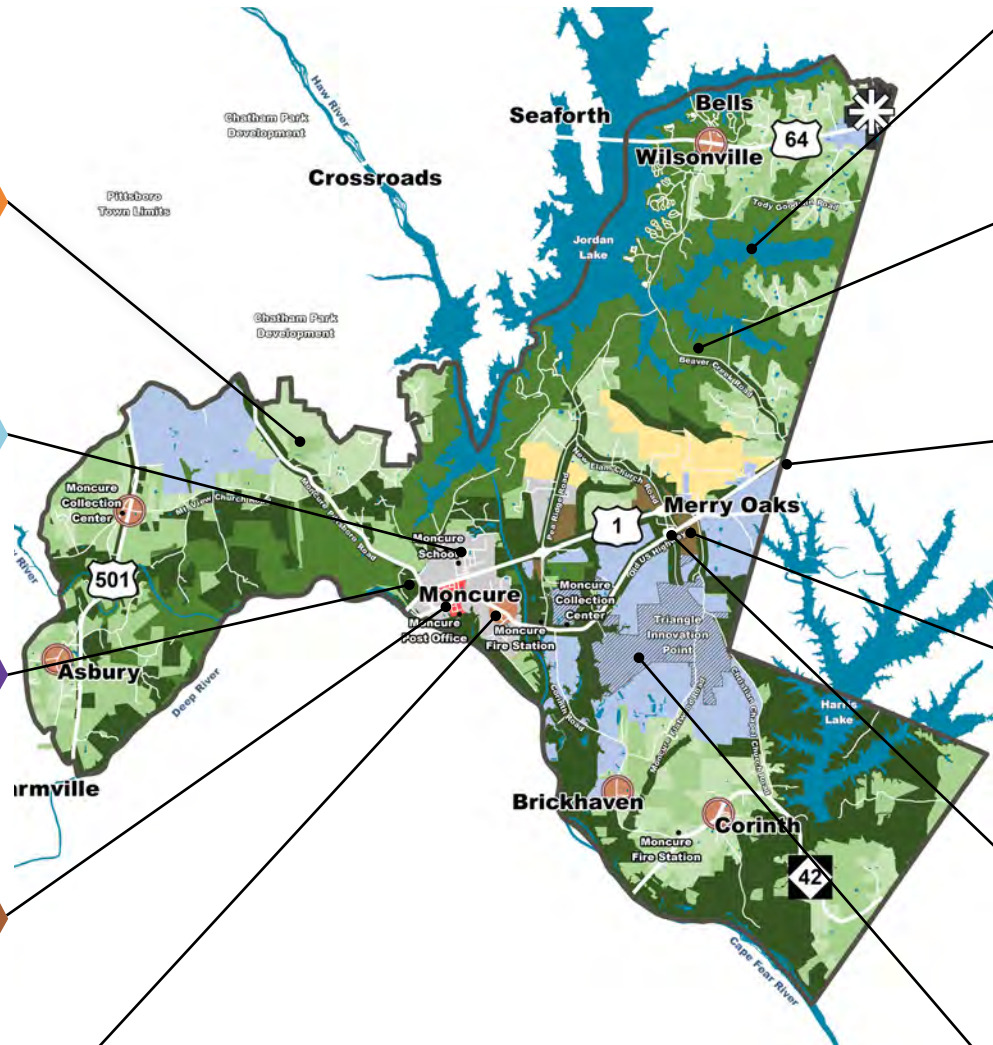
THEME 10

Improve transportation safety and mobility

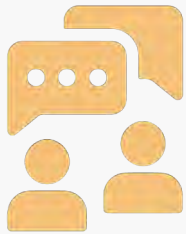


THEME 12

Help residents access new employment opportunities



The overall Implementation Strategy for *Plan Moncure* notes the 12 general “themes” or action steps that Chatham County, local residents, and other partners will take to accomplish the shared vision described in the plan. The following pages list specific implementation projects under each theme.



Theme 1. Improve Communication and Coordination

As the pace of change accelerates in Chatham County and the Triangle region as a whole, the need to share timely information with community residents on County projects, proposed new developments, and other topics only increases in importance. In addition, the County must continue to coordinate with surrounding local governments and other partners, actively sharing the community vision embodied in Plan Moncure, learning about the latest plans of other communities, and identifying opportunities for collaboration.

1.1 USE THE PLAN IN DECISION MAKING

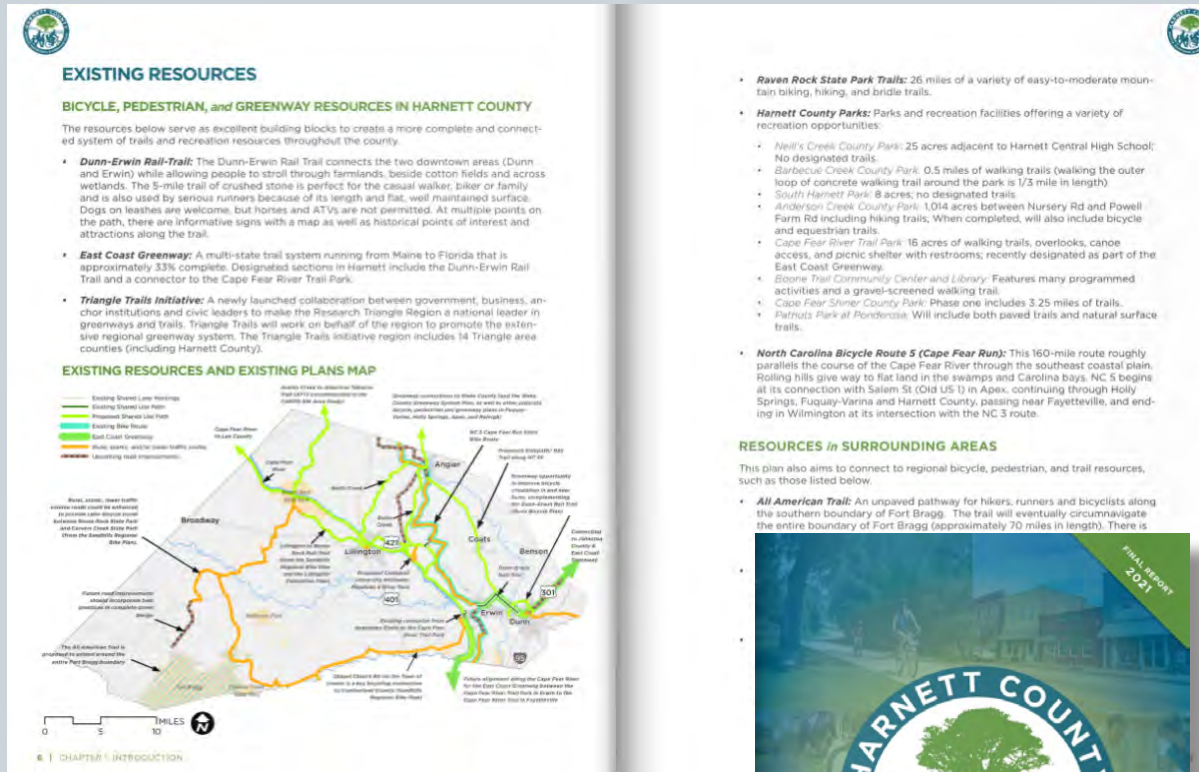
The Plan Moncure document provides Chatham County, residents, businesses, investors, and others with a touchstone to help them make decisions consistent with the shared community vision in order to gain the support of Chatham County and help implement the plan over time. In order to serve this function effectively, the County will use Plan Moncure often and share it broadly.

1.2 IMPROVE COMMUNICATION

Timely information about County activities, and referrals to other government agencies and partners, will help the residents of greater Moncure track the changes occurring in their community, get their questions answered, and identify opportunities for input and coordination. As a result, Chatham County will actively advertise the County number to call to get a referral to the right department, and will continue using tools like the Community Kiosk in the Moncure Collection Center to post the latest information on County projects.

1.3 CONTINUE CROSS-JURISDICTIONAL COORDINATION

The greater Moncure area lies at the intersection of four counties. As a result, to help shape its own future, Chatham County will actively continue to coordinate with neighboring communities on land use, transportation, utilities, trails, and other topics at the staff and elected official level.



Harnett County has plans to build a Cape River Trail to connect Raven Rock State Park with the Town of Lillington and extend it west to the Chatham County/Lee County line.

Photos on right: Chatham County has installed a community information kiosk at the Moncure Collection Center, and has worked to engage with local residents and businesses as part of the Plan Moncure planning process.

- Raven Rock State Park Trails:** 26 miles of a variety of easy-to-moderate mountain biking, hiking, and equestrian trails.
- Harnett County Parks:** Parks and recreation facilities offering a variety of recreation opportunities:
 - Neill's Creek County Park:** 25 acres adjacent to Harnett Central High School. No designated trails.
 - Barbecue Creek County Park:** 0.5 miles of walking trails (walking the outer loop of concrete walking trail around the park is 1/3 mile in length).
 - South Harnett Park:** 8 acres; no designated trails.
 - Anderson Creek County Park:** 1,014 acres between Nursery Rd and Powell Farm Rd including hiking trails. When completed, will also include bicycle and equestrian trails.
 - Cape Fear River Trail Park:** 16 acres of walking trails, overlooks, canoe access, and picnic shelter with restrooms; recently designated as part of the East Coast Greenway.
 - Boone Trail Community Center and Library:** Features many programmed activities and a gravel-screened walking trail.
 - Cape Fear River Trail Park:** Phase one includes 3.25 miles of trails.
 - Patriots Park at Ponderosa:** Will include both paved trails and natural surface trails.
- North Carolina Bicycle Route 5 (Cape Fear Run):** This 160-mile route roughly parallels the course of the Cape Fear River through the southeast coastal plain. Rolling hills give way to flat land in the swamps and Carolina bays. NC 5 begins at its connection with Salem St. (Old US 1) in Apex, continuing through Holly Springs, Fuquay-Varina and Harnett County, passing near Fayetteville, and ending in Wilmington at its intersection with the NC 3 route.

RESOURCES in SURROUNDING AREAS

This plan also aims to connect to regional bicycle, pedestrian, and trail resources, such as those listed below.

- All American Trail:** An unpaved pathway for hikers, runners and bicyclists along the southern boundary of Fort Bragg. The trail will eventually circumnavigate the entire boundary of Fort Bragg (approximately 70 miles in length). There is





Theme 2. Protect Rural Character and Rural Lifestyle

Many families have lived in Moncure for generations, and others have moved here more recently, in significant part because they love the area's rural character, and the rural lifestyle that it provides.

2.1 Update Zoning Map to Implement Plan Moncure Future Land Use Map

A key early implementation task is to update the Chatham County Zoning Map using the land use pattern described in the Plan Moncure Future Land Use Map. In some parts of the study area, this process will take place over time as private developers propose projects for consideration by Chatham County. The plan provides the County with a touchstone to help make decisions on proposed development projects in a manner that is consistent with the shared community vision.

2.2 Update Unified Development Ordinance to Implement Plan Moncure Zoning Strategy to Protect Rural Character and Lifestyle

A second task is to include updated development standards in the Chatham County Unified Development Ordinance to implement the Plan Moncure Zoning Strategy (See page 82). This should include considering measures to encourage context-sensitive design such as promoting vernacular architecture and tree preservation, directing new commercial development to nodes, adopting a zoning district appropriate for permanently protected lands, and encouraging agriculture- and forestry-friendly developments.

2.3 Protect Key Viewsheds and Road Corridors

The way a place feels is shaped to a significant degree by the views from public roads. As a result, a Road Corridor Protection Overlay Zone will be prepared as part of the Unified Development Ordinance. The Future Land Use Map and Zoning Map will show where this overlay zone is established.

2.4 Update Chatham County Farmland Preservation Plan

Chatham County should update its 2009 *Agricultural Land Use Plan and Agricultural Economic Development Plan* and develop an impactful and manageable action plan to guide this work in the Moncure area and across the county in the years ahead.

2.5 Develop a County-led Farmland Protection Program

With the updated Farmland Preservation Plan in hand, Chatham County should implement it to help protect the farming way of life, and the contributions it makes to the local economy and the rural landscape.

2.6 Allow Home-Based Businesses That Are Compatible With the Rural Landscape on Large Lots

To continue farming, many farmers need to find new ways to derive income from their property. As part of the Unified Development Ordinance, the County will make updates to the home-based business standards to continue supporting non-farm activities that are compatible with the rural landscape.



Top Photo: Pick-up truck planter in Haywood.

Bottom Left: Old US-1 road corridor.

Bottom Right: Home-based businesses such as small engine repair provide families with additional sources of revenue in a manner that is compatible with the rural landscape.

Buncombe County, NC Blue Ridge Parkway Scenic Overlay District

To help protect the beauty and rural character of views from the Blue Ridge Parkway, in 2015 Buncombe County, NC adopted a scenic corridor overlay district. It established special standards for new development or major redevelopment (changes costing more than 50% of appraised value of the structure being modified) on land in the County's zoning jurisdiction extending 1,320 feet on each side of the centerline of the Blue Ridge Parkway. The standards include a 50-foot building setback from the edge of property owned by the National Park Service, a maximum building height of 40 feet above the height of the Parkway centerline, vegetative screening requirements, and notification of the National Park Service of the proposed development.

Other communities have established large vegetative buffers along road corridors as well, including the City of Raleigh, Wake County, and Durham County along I-40, and the City of Greensboro along NC 68 and the Greensboro Urban Loop.





Theme 3. Protect Natural Resources

The greater Moncure area includes a notable array of natural features, resulting in part from the extensive riverine environments and large tracts of protected green space that exist here near the confluence of the Haw and the Deep Rivers.

3.1 Continue Considering Updates to Maintain and Improve Resource Protection as Part of the Unified Development Ordinance

As part of drafting the UDO, the County should consider a variety of updates intended to increase resource protections for new development, including updating the open space requirements, encouraging conservation subdivisions, encouraging the integration of open space into new development, continuing policies that discourage mass grading, encouraging development design that preserves green infrastructure on site, and encouraging density transfers to protect landscape level green infrastructure.

3.2 Update Natural Heritage Inventory for Chatham County

Chatham County is submitting a grant request to the N.C. Natural Heritage Program to update the County's Natural Heritage Inventory to develop a current understanding of the important and endangered plant and animal communities in the county. This will include a variety of sites in the greater Moncure area.

3.3 Prepare Comprehensive Conservation Implementation Plan

Chatham County is funding a Comprehensive Conservation Implementation Plan that should include metrics to measure county conservation goals, a public online dashboard to monitor progress towards those goals, and an actionable plan for implementing goals that have not yet been achieved, among other features.

3.4 Continue Working with Builders and Residents of Homeowners Associations to Improve Stormwater Management Continuity for HOAs

Chatham County will continue its existing initiative to help residential builders transition responsibility for maintaining stormwater management facilities to Homeowners Association (HOA) residents to make sure these facilities continue to function effectively in managing the impacts of stormwater runoff.



Cape Fear River near Avents Ferry Road in Chatham County.



Theme 4. Provide Needed Community Facilities and Services

Community facilities such as schools, parks, and community centers play an important role in community life, providing places to learn, recreate, and socialize. They also provide important venues for residents to come together as a community. Facility improvements are needed as the community grows. The specific needs will be determined by the nature and extent of the growth, and the resources available from public and private sources.

4.1 Consider Building New School

Chatham County Schools is considering building a new elementary school at the Southern Village component of Chatham Park to help ensure adequate facilities for the growing number of students in the southeastern part of the county.

4.2 Consider Improving Moncure School

Chatham County Schools should also explore improvements to the Moncure School to modernize and improve this longstanding community facility, and help it continue to serve the growing student population in the greater Moncure area.

4.3 Consider Possible Community Center as Part of Parkers Ridge Park

As Chatham County prepares the master plan for Parkers Ridge Park, it should consider including a community center to serve youth, seniors, families, and residents of all ages in the greater Moncure area.

4.4 Consider Possible Joint School Use to Provide Additional Community Services in Cost-Efficient Manner

To provide needed community facilities in a cost-effective manner, Chatham County should consider developing a joint use arrangement with Chatham County Schools to allow for appropriate community use as part of any new school facilities in the greater Moncure area.

4.5 Explore Possible Chatham County Sheriff Substation in SE Chatham

The Chatham County Sheriff's Department should consider the possibility of establishing a substation in the greater Moncure area to improve response times and public safety services in this part of the county.

4.6 Explore Preparing Southeast Chatham Fire Facilities Plan

The Moncure Fire District should consider preparing a facilities plan for the southeastern part of the county to ensure adequate fire facilities and prompt response times as the area grows.

4.7 Coordinate with U.S. Postal Service about Possible Improvements to Moncure Post Office

Chatham County should request that the U.S. Postal Service explore possible improvements to the Moncure Post Office to serve a growing population with updated facilities.



Top Photos: Moncure school and gymnasium.
Bottom: Moncure Fire Station.



Theme 5. Provide Needed Recreational Amenities

The southeastern part of Chatham County is blessed with outstanding recreational resources centered around Jordan and Harris Lakes, including extensive game lands. These places offer a variety of opportunities for fishing, boating, swimming, and hunting. More recreational facilities are needed to serve local residents, and to meet the needs of a growing population.

5.1 Build Parkers Ridge County Park

Chatham County will build Parker's Ridge Park to provide this much-needed recreational facility in the southeastern part of the county. A master plan for the park is being developed at the time of Plan Moncure, and the Chatham County Commissioners have allocated funds for park development.

5.2 Work To Develop New Walking, Hiking, and Biking Trails

The Plan Moncure study area lies at the intersection of a growing trail network, with ready access to existing and planned trails along the Deep River, the Haw River, the Cape Fear River, Jordan Lake, Harris Lake, and the American Tobacco Trail. An important opportunity is to develop a loop trail to connect Moncure and Haywood with key destinations such as the Moncure School, the Deep River, the Haw River, the Cape Fear River, and Jordan Lake. As a result, Chatham County will continue to work to develop these facilities to help residents and visitors enjoy the rural landscape and be active. In addition, Chatham County should require sidewalks in new developments near or in planned centers and other pedestrian generators.

5.3 Require, Encourage, or Incentivize Donation or Reservation of Easements and Construction for Trails and Greenways Shown in Adopted Plans, As Appropriate

In order to develop the planned trail network in a systematic and coordinated manner, Chatham County should work to secure easements and improvements as part of new development. In so doing, the evolving trail system will add value to every place along its path.

5.4 Work to Develop New Water Access Points for Boating, Fishing, and Kayaking Especially Along the Deep and Cape Fear Rivers

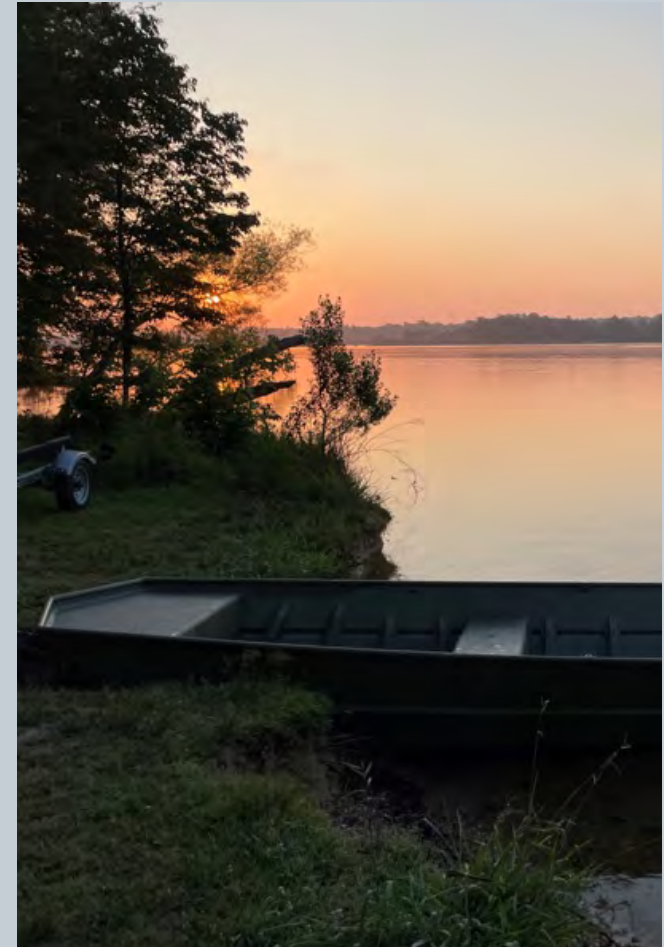
Chatham County should work to implement its plan of a coordinated set of water trails by improving regular water access points. In so doing, it can facilitate water access and a diversity of boat trips for a wide range of users.



Upper Left: Opportunities for new walking and biking trails abound in the greater Moncure area, including along the route of a former rail line near the Moncure school.



Upper Right: Chatham County is developing land near the intersection of US - and Pea Ridge Road into the new Parkers Ridge Park.



Left: The greater Moncure area is blessed with extensive water resources, including Jordan Lake.
Above: Sunrise on Harris Lake provides a quiet time for boating.



Theme 6. Add Important Community-Serving Infrastructure

The greater Moncure area has long supported major infrastructure that serves the Triangle region. At the same time, it also needs more infrastructure such as broadband and utilities to better serve the local community.

6.1 Continue Working to Partner With Internet Service Providers to Provide Affordable Broadband Service, Within Authority and Resources Available

Chatham County has been actively working to expand broadband service throughout the county, where it can partner with Internet Service Providers and find the necessary resources, such as through state and federal grants.

6.2 Collaborate With Partners to Identify Wastewater Service Needs and Feasibility

While Chatham County currently provides public water service to the southeastern part of the county, it does not provide wastewater service. Wastewater for private developments will most likely need to be via private vendors or via septic systems. The City of Sanford is extending wastewater service to Triangle Innovation Point which is intended to serve industrial users such as VinFast and FedEx. To design and fund such infrastructure for other users, collaboration will be needed between multiple partners using resources from both the public and private sectors. Chatham County stands ready to collaborate as users come forward with service needs.

6.3 Where Appropriate, Work With Partners to Draft Wastewater Agreements Needed to Serve Mixed Use Center Planned Along US-1

As users come forward with service needs, Chatham County will work cooperatively to draft wastewater agreements as appropriate to support needed collaboration and help facilitate obtaining wastewater service. Should additional wastewater service be available from Sanford that is not needed for Triangle Innovation Point and/or not otherwise needed by Sanford, the County will work with Sanford to amend their existing Interlocal Agreement to allow this capacity to serve development consistent with the Plan Moncure Future Land Use Map. Similarly, the County will investigate opportunities for an interlocal agreement with the Towns of Cary and Apex for wastewater service at the Western Wake Regional Water Reclamation Facility in New Hill, NC.



Above: Chatham Park built a new water recovery center to treat wastewater along Business 64 east of Pittsboro.

Right: Where local governments are able to partner with internet service providers and tap state and federal infrastructure funds, they can sometimes bring broadband service to underserved rural areas.





Theme 7. Maintain Affordability

Rapid growth in the greater Moncure area and the Triangle as a whole is driving up housing prices. This can create a cost burden both for newcomers and for longstanding residents, especially those who are on a fixed income. As a result, Chatham County will pursue a variety of strategies to help address housing affordability in the greater Moncure area.

7.1 Work With Non-Profit Organizations to Continue Providing Home Repair and Weatherization Assistance to Residents in Need

Chatham County will continue its existing collaboration with non-profit organizations to provide home repair and weatherization assistance to qualifying residents throughout the county, including in the greater Moncure area. This support can help keep residents in need, including those on fixed incomes, in their homes, and help ensure they have safe, decent, affordable housing.

7.2 Increase Funding for Chatham County Housing Trust Fund

Chatham County will look for opportunities to increase the funds it invests in its Housing Trust Fund. These funds are used to help catalyze the production of affordable housing by providing gap funding to non-profit developers to combine with affordable housing tax credits, private capital, and other financing to build units and provide them at below market rates.

7.3 Explore Contribution to Housing Trust Fund and Other Affordable Housing Opportunities from Major Employers in the Area

Companies need a strong labor pool to compete successfully in a global economy, and helping ensure the availability of safe, decent, affordable housing can provide an attractive incentive to prospective workers. As a result, Chatham County will explore opportunities to partner with major employers to contribute resources toward this purpose.

7.4 Promote Development of Accessory Dwellings Consistent with County Regulations

Chatham County will continue to allow accessory dwellings as a low-impact means of providing more housing options. Such units can provide more affordable housing, both for renters and for the primary home owner, who now can derive additional income from their property in a manner compatible with the surrounding neighborhood.

7.5 Explore Possible Zoning Provisions for Affordable Housing with Contribution Options and Incentives

Consider making it easier to build a range of housing types to provide more living options, including townhomes, condominiums, apartments, small-lot single family detached dwellings, and “cottage court” housing, as well as appropriate non-residential uses. In appropriate locations, provide development guidelines that promote attached and small-lot single family housing options at more affordable price levels. Explore development contributions to help fund affordable housing as part of receiving entitlement benefits.

7.6 Continue to Encourage Developers to Partner with Nonprofit Affordable Housing Developers

Chatham County will continue to encourage market-rate developers to partner with non-profit affordable housing organizations to increase the production of new affordable units in Chatham County, including the greater Moncure area. The County will use its resources as appropriate to encourage this activity, including unneeded County land and funds from the Chatham County Housing Trust Fund.

7.7 Explore Preservation of Existing Mobile Home Parks to Help Preserve Affordability

Chatham County will review examples of other communities that have worked to preserve existing mobile home parks to help maintain affordability for residents, and evaluate possible use of appropriate techniques in Chatham County.

New housing options can sometimes take the form of (from left to right) townhomes, duplexes, multi-family dwellings, and accessory dwellings.

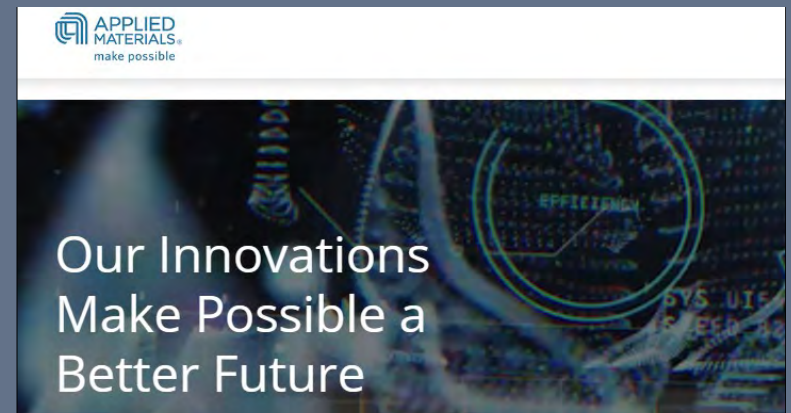


Applied Materials Employer-Assisted Housing Initiative

Concerned about its ability to recruit and retain talented workers, and about the community's ability to do the same for essential workers, semiconductor systems company Applied Materials began investing money in the Housing Trust of Silicon Valley, CA in 2000. These funds have helped provide downpayment assistance to first-time homeowners in the form of no-interest deferred loans. In addition, the Housing Trust provides loans to affordable housing developers to help them build new affordable units. In 2016, Santa Clara County, CA passed a \$950 million affordable housing bond to help it provide housing for special populations like veterans, seniors, and very low-income residents. With help from partners like Applied Systems and Santa Clara County, the Housing Trust has invested more than \$522 million in affordable housing in the Bay area and leveraged an additional \$7.6 billion in funding for this purpose.

Closer to home, UNC Health is making a \$5 million contribution to the Town of Chapel Hill's Housing Trust Fund as part of the approval of the Eastowne redevelopment in June of 2023.

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Theme 8. Provide Desired Land Uses and Development Amenities

Some desired land uses and services such as grocery stores, retail development, and restaurants can only be provided by the private sector that has the financial resources and expertise to invest in these activities. Chatham County can help support such development consistent with Plan Moncure by providing information and technical assistance. In addition, as Chatham County considers applications for new development, it will work with developers to help ensure that proposed projects provide community benefits such as needed infrastructure and community facilities.

8.1 Work With Property Owners and/or Retailers and Restaurants to Consider Locating Stores in Moncure Area

Chatham County will provide information and other technical assistance as requested to property owners, retailers, and restaurants to help them consider locating stores in the greater Moncure area. This could also include exploring incentives for commercial building renovation and reuse in historic Moncure and Haywood.

8.2 Work With Developers to Provide Community Benefits As Part of Development Approvals

Requests for approvals of new development in the greater Moncure area will bring benefits for developers and also responsibilities to help provide the infrastructure and facilities needed to support new residents and businesses. As a result, Chatham County will work with developers during the plan review process to identify needed improvements to help serve the new development.



In some cases, local governments can negotiate the provision of sites, funding, or construction of new community facilities such as parks and libraries by developers as part of larger development projects.



Theme 9. Enhance Historic Villages, Create Walkable "Downtown"

The greater Moncure area includes longstanding community focal points such as Moncure and Haywood, as well as potential sites for new centers at interchanges along US-1. Chatham County will pursue several implementation measures to support these historic places by allowing appropriately-scaled infill development, and facilitate suitable mixed use development in the specified new locations.

9.1 Evaluate Zoning Designations in Historic Villages such as Historic Moncure as Part of UDO to Help Facilitate Appropriate Infill

As part of drafting the Unified Development Ordinance, Chatham County will evaluate the zoning designations in longstanding villages such as Historic Moncure and Haywood with the help of the Plan Moncure zoning strategy to explore possible revisions to support compatible infill development.

9.2 Require Applicants For Community Center Development To Prepare Detailed Master Plan Along US-1 Between Pea Ridge Road and Old US -1/Christian Chapel Church

To ensure that new commercial development occurs in a walkable, mixed-use form, Chatham County will require applicants for new community center development along US-1 at Pea Ridge Road and Christian Chapel Church Road to prepare detailed master plans for review and consideration by Chatham County as part of the development review process.



Top: Recent work has occurred to restore and repurpose old commercial buildings in historic Moncure.

Bottom: Thoughtfully designed infill development can bring new retail and dining opportunities to the local community.

Salisbury, NC Infill Development Provisions

To help encourage development of underused parcels in a manner consistent with existing development, the City of Salisbury, NC adopted special infill provisions in 2022. Infill development applicants must determine the average front setback of the closest building on either side of the subject lot and use the same setback distance for their infill structure. In addition, applicants must match the building alignment of comparison structures when they are aligned parallel or perpendicular to the street centerline. If the block only provides access to homes via alleys, then infill applicants must do the same. Finally, if a public sidewalk is present along the comparison lots, then the applicant must install one along the frontage of their property as well. The result of these standards is to allow for new development that improves neighborhood vitality and increases housing options in a manner consistent with the existing community character.





Theme 10. Improve Transportation Safety and Mobility

The transportation network is a vital system within Chatham County and the greater Moncure community, and the evolution of this system will be integral in the realization of the shared community vision for the region. Plan Moncure focuses on balancing roadway function with the values and themes identified by existing and future greater Moncure community citizens.

10.1 Build on Plan Moncure Safety Analysis to Partner with NCDOT and TARPO to Explore Opportunities to Address High Risk Sites for Future Study and Possible Mitigation

The safety of all citizens as they navigate the transportation network is a key concern for the region. As part of Plan Moncure, the North Carolina Safety Improvement Program (HSIP) map was reviewed to identify locations where historical crash trends met warrants for inclusion in the program. The HSIP is a North Carolina Department of Transportation (NCDOT)-run program that identifies segments and intersections to review and address traffic safety concerns. Chatham County should partner with NCDOT and the Triangle Area Rural Planning Organization (TARPO) to explore the following additional ways to address transportation safety issues:

- Submit a Crash Data Request to NCDOT Mobility and Safety Unit
- Use NCDOT Safest Feasible Intersection Design (SAFID) Tool
- Use NCDOT Predictive Analysis Spreadsheets
- Partner with the Triangle Area RPO (TARPO) to pursue a federal Safe Streets and Roads for All (SS4A) safety planning grant for Chatham County to provide a more in-depth study across all modes, with implementation funding available once the study is completed.

<u>General Information</u>		Ranking	
		<u>2021</u>	<u>2022</u>
Population (2021)	77,420	36	36
Registered Vehicles (2021)	88,627	37	37
Estimated Avg. Annual Miles Traveled (100 MVMT) (2021)	9.16	36	37
<u>Crash Rates</u>			
<i>(Based on a 3 Year Average of All Reported Crashes)</i>			
Total Crash Rate (/100 MVMT)	209.07	83	74
Fatal Crash Rate (/100 MVMT)	1.56	58	49
Non Fatal Injury Crash Rate (/100 MVMT)	39.62	90	85
Crash Injuries Per 1000 People	6.85	91	91
Fatal Crash Injuries Per 1000 People	0.19	38	49
Crashes Per 1000 Reg. Veh.	21.61	72	74
Fatal Crashes Per 1000 Reg. Veh.	0.16	50	51
Percent Alcohol Related Crashes	4.3%	55	60
Severity Index	4.15	59	62

Source: Chatham County Crash Profile Summary, NCDOT

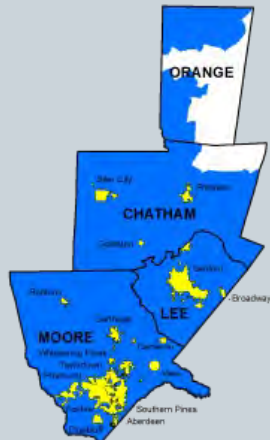
10.2 Communication and Coordination

Active and transparent communication between the greater Moncure area, Chatham County, and NCDOT is necessary to create an agile process centered around the transportation needs and concerns in the area. A clear line of communication between residents and representatives from the greater Moncure area, Chatham County, and NCDOT should be established.

- Support from the Triangle Area Rural Planning Organization (TARPO) can be requested to set up additional coordination meetings between the County staff, RPO staff and NCDOT to discuss outstanding transportation issues
- Through its membership in TARPO, Chatham County can request transportation planning funds from NCDOT TPD for a transportation study
- Through its membership in TARPO, Chatham County can request transportation improvement projects to be submitted through NC Strategic Transportation Initiative (STI) Prioritization for funding in the State Transportation Improvement Program (STIP).



TARPO Planning Area, Source: TARPO, <https://www.tarpo.org/>



10.3 Join CAMPO

The Capital Area Metropolitan Planning Organization (CAMPO) coordinates transportation planning in Wake County and portions of Franklin, Granville, Johnston, and Harnett counties. Chatham County membership in CAMPO could bolster transportation funding and technical assistance for the community and provide an opportunity for further coordination with surrounding counties. As a result, Chatham County should continue the process of joining CAMPO.

10.4 Conduct Microtransit Feasibility Study for Chatham County

The emergence of microtransit provides a flexible, multimodal service option for members of the community. The on-demand service could provide a benefit to local commuters by establishing a public transportation option between residential areas and growing centers of development in the future. This topic may be addressed, at least in part, by the Alternative Transportation Demand Study funded by Chatham County in FY2024. In addition, Chatham County should consider

- Applying to NCDOT Intermodal Division for a microtransit feasibility study; conducting a microtransit feasibility study for Chatham County that investigates the demand for transit services
- Reviewing the Mobility for Everyone, Everywhere in NC (MEE NC) requirements for inclusion in this program
- Reviewing the Chatham Transit Network existing service and provide outreach, education, or identify barriers of use.



Morrisville Smart Shuttle is an example of microtransit service that was launched in Morrisville in 2021. (Source: Town of Morrisville)



Top: A passenger boards Chatham Transit bus in Pittsboro (source: Chatham News Record)
Bottom: A Town of Matthews roadway example with a shared use path
Right: Example of NCDOT cross-section (typical section No. 3D) with a shared use path

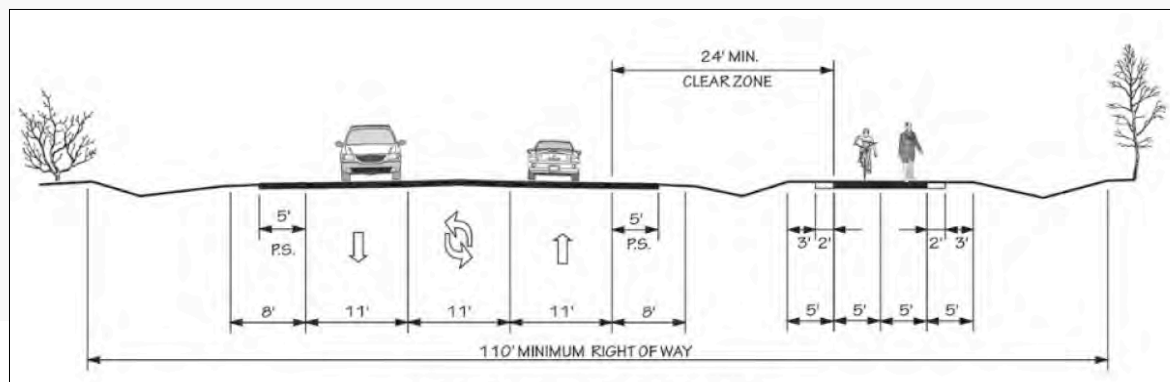
10.5 Support Bicycle and Pedestrian Planning and Educational and Safety Outreach

Chatham County should identify and leverage the State and Local programs available to expand bicycle and pedestrian planning and educational outreach for pedestrian and bicycle safety in the area. In addition, it should partner with local groups to determine the most effective way to reach target audiences, and update and enhance existing and future facilities to create a safer transportation system. Possible measures include:

- Building on the foundation of TARPO Bicycle and Pedestrian Planning Framework and Chatham County Parks and Recreation Master Plan to develop an active transportation plan for Chatham County
- Applying to NCDOT to become a partner in a Watch for Me NC Campaign for Chatham County in support of bicycle and pedestrian safety in Chatham County
- Pursuing a federal Safe Streets and Roads for All (SS4A) safety planning grant for Chatham County for a planning study that would support the safety of all roadway users.

10.6 Update UDO to Require Recommended Design Standards and Road Cross Sections for All Modes

Chatham County should update the UDO to require recommended design standards and cross sections that support accessibility and mobility, including bicycle and pedestrian improvements and dedicated easements for planned future greenways in key areas. In addition, it should review the UDO for block length and connectivity requirements to support multiple access points to new developments and improve emergency services access, bicycle and pedestrian access, and roadway network connectivity. Finally, it should specify that new development is required to build complete streets.



10.7 Context-sensitive Design and Complete Streets

Chatham County should work with TARPO, NCDOT and other transportation planning partners to help ensure context-sensitive design and complete streets implementation, where possible. The NCDOT Complete Streets Policy focuses on incorporating multiple modes of transportation when constructing new facilities or upgrading existing infrastructure and creating a network that enhances mobility, improves safety, and promote economic and health benefits.

10.8 Evaluate Improved Transit Access to Megasite

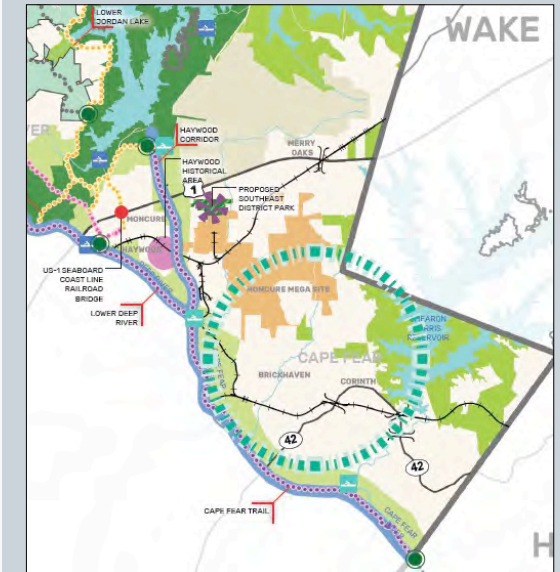
Efficient, safe, and equitable access to the Megasite will be important. Transit can play a key role in providing this. In addition to microtransit, other transit options that should be explored include the following:

- Consider providing additional fixed routes for the Chatham Transit Network (CTN) to the Moncure area. This can be explored through future transit planning studies. This topic may be addressed, at least in part, by the Alternative Transportation Demand Study funded by Chatham County in FY2024; or through a microtransit feasibility study
- Explore opportunities for Megasite supported shuttle services to proximate residential areas, preferred vanpool parking, and/or other Travel Demand Management incentives.

10.9 Prepare SE Chatham County Transportation Study

Chatham County should consider working with regional transportation partners and NCDOT to prepare a transportation study for Southeast Chatham County.

- Through its membership in TARPO, Chatham County could request transportation planning funds from NCDOT TPD for a transportation study
- Alternatively, the planning study funds could be applied for through CAMPO when Chatham County joins CAMPO
- A small area transportation study could support a deeper dive into specific locations and identify targeted improvements
- Improvements across all modes could be explored, including transit, freight and active transportation links
- The study could build on the vision for the area to further detail infrastructure improvements needed to realize the vision for the greater Moncure area
- In coordination with TARPO (or CAMPO), the County should then consider incorporating the study recommendations into an amendment to the Chatham County Comprehensive Transportation Plan (CTP).



Chatham County Comprehensive Parks and Recreation Master Plan has identified a recommended Cape Fear Trail as well as potential equestrian trails in the vicinity of Moncure Megasite (Source: Chatham County).



Theme 11. Protect Historic Resources

Historic structures play an important role in preserving the history of the greater Moncure area and helping residents and historic organizations tell its story. This is especially important as this part of Chatham County undergoes rapid change. As a result, this plan includes several implementation measures to help honor the local history.

11.1 Explore Possible Cultural Heritage Plan for Chatham County

In order to weave together the different threads of the story of southeastern Chatham County, it can be helpful to prepare a Cultural Heritage Plan that identifies historic resources and how they embody local historical themes. The plan can also identify strategies for preserving these resources and interpreting them in ways that honor the history of longstanding residents and introduce newcomers to this special place.

11.2 Explore National Register listing of eligible historic structures

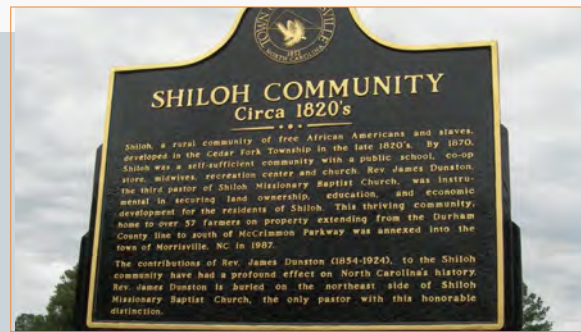
Chatham County can support property owners and historic preservation partners such as the Chatham County Historical Association and Preservation North Carolina in working with the NC State Historic Preservation Office in nominating properties for listing on the National Register of Historic Places. Listing brings recognition, eligibility for historic preservation tax credits for rehabilitation, and limited protection from state and federal projects.

11.3 When and Where Appropriate, Work with Partners to Develop Wayside Markers and Educational Displays to Share Local History

Wayside signage and historical markers can help honor historic sites and build awareness of local history. These can be installed as individual signs at important locations or organized as historical “trails” spaced at regular intervals along roads or pedestrian and bicycle paths to tell a cohesive story of local historical activities and events.



The Lockville Dam, Canal, and Powerhouse at Old US-1 and the Deep River are listed on the National Register of Historic Places.



Historic markers can help tell the story of the local community.



Jack Womble's old filling station on Old US-1 has been determined to be eligible for listing on the National Register of Historic Places in a 2022 study conducted for the NC Department of Transportation.

Morrisville, NC Historic Walking Loop

Morrisville was first established in the mid 19th century when Jeremiah Morris gave three acres of land to the North Carolina Railroad for a train station. To help honor its history and introduce thousands of new residents to the remaining historic structures in its original depot village, in 2016 the Town of Morrisville created a historic walking tour with a continuous sidewalk loop, wayside interpretive signs, and benches. The result is a facility that helps Morrisville residents and visitors be active and learn about the history of the community even as it grows and evolves as a result of new development.





Theme 12. Help Residents Access New Employment Opportunities

With the continuing growth of the region and major new manufacturing and light industrial businesses locating in Triangle Innovation Point, there are new potential jobs and business opportunities for local residents, if they have the skills and resources needed to take advantage of them. As a result, Chatham County will pursue several strategies to promote continuing education and skills development to help interested local residents access these work and income options.

12.1 Continue Working with CCCC on Job Skills Development Partnership to Help Train Local Residents

Chatham County and the Chatham County Economic Development Corporation (EDC) will continue working with Central Carolina Community College (CCCC) to offer skills training for local residents. CCCC has received significant funds from the State of North Carolina to develop such programs as part of the incentives package for VinFast. Potential strategies could include direct outreach to SE Chatham residents, and/or providing training in the Moncure area (perhaps on-site at VinFast or supplier facilities).

12.2 Work with Partners such as CCCC, Innovate Carolina, 79 Degrees West, Web Squared to Provide Greater Participation by Small- and Medium-sized Firms

Chatham County and the EDC will also continue their work with a number of partners to help small- and medium-sized companies develop their business and create new jobs in the local area. They should also introduce new megasite businesses to local small businesses and encourage their mutual support.

12.3 Support Increased Tourism and Recreation Opportunities and Amenities, Particularly Sustainable Tourism and Authentic Experiences

Chatham County and the EDC will also work with the Pittsboro-Siler City Convention & Visitors Bureau and other organizations to support the continuing development of sustainable tourism and authentic experiences for visitors to help them access and enjoy the many natural, cultural, and recreational assets of the area. As part of this work, they should provide information to megasite employees and their families about day-trip and weekend-recreation opportunities in Chatham County.



Potential educational, employment, and business opportunities exist for residents in the greater Moncure area, including taking job training classes (upper left), developing skills and products in a maker space (lower left), providing recreational opportunities (upper right and lower right), and featuring local businesses at street fairs (lower middle).

VI. CONCLUSION | NEXT STEPS

Taking Action to Pursue the Community Vision

As southeastern Chatham County continues to grow with the arrival of major new employers, this action plan will help the community evolve in ways that support the shared community vision described in Plan Moncure. While the planning process is relatively brief, plan implementation is a long-term commitment. Implementation of this plan is a also shared responsibility. The County will take the lead while working collaboratively with a wide variety of partners, including local, regional, state and federal agencies, NCDOT, non-profits, area organizations and institutions, private developers, businesses, property owners, and landowners.

With the help of the implementation measures listed in this plan, Chatham County, the residents of the greater Moncure area, and their partners can work collaboratively to harness both public and private investment in service to this vision. If they do so effectively, they can help manage the forces of change and shape the community in ways that continue to make it an outstanding place to live, work, and recreate in the years ahead.



BEGINNING THE IMPLEMENTATION PROCESS

To help catalyze timely and effective implementation of Plan Moncure, the plan pairs the full list of recommendations and strategies presented in the previous section with a Short-Term Implementation Projects Table maintained separately by Chatham County staff outside the plan. This is a tool for Chatham County to use in initiating and monitoring an initial set of implementation activities over the next two years or so. Since implementation is a shared responsibility, this table is intended to guide the work of the County, partner agencies, local organizations, and representatives of the private sector as they work together to implement the plan and realize the vision. The table describes each short-term action item, lead departments and agencies, potential funding sources, and next steps. A copy of the table is available for viewing on the Plan Moncure website, or upon request to County staff.

Some tasks are easily accomplished in the near-term while others will likely be more feasible later. As a result, patience may be needed for some aspects of the plan to be realized over an extended period of time.

Coordination across County departments is key to achieving results efficiently and effectively. Therefore, County departments should consider the potential for identifying common interests and needs and sharing appropriate resources. For example, efforts to obtain necessary grant funding could be optimized by two or more departments sharing responsibilities for the preparation and submission of applications.

Several examples of key short-term projects that Chatham County will pursue are listed on the following pages.

In this way, the plan is designed to help Chatham County, local residents, and their partners move smoothly and effectively from planning to implementation and begin realizing the shared community vision on the ground.



Key Short-Term Projects

Short-Term Project 1

This includes Implementation Projects 2.1, 2.2, 2.3, 2.6, 3.1, 5.2, 5.3, 7.5, and 9.1.

INCLUDE UPDATED STANDARDS IN THE UNIFIED DEVELOPMENT ORDINANCE (UDO) TO PROTECT RURAL CHARACTER AND ENVIRONMENTAL QUALITY, ENHANCE HISTORIC VILLAGES, AND CREATE A WALKABLE DOWNTOWN

A number of the implementation projects for Plan Moncure include additions and revisions to Chatham County's standards for new development that it can make as part of preparing the Unified Development Ordinance. The UDO project is already well underway but still in process, so these projects will be included as part of this work.



Restaurants and outdoor dining can provide fun community gathering spots as a part of a walkable downtown.

Short-Term Project 2

This includes Implementation Project 5.1.

2. BUILD PARKERS RIDGE PARK

This project led by the Chatham County Parks & Recreation Department is already in the process of preparing a master plan for the park site, and the Chatham County Board of Commissioners has allocated funding to make park improvements.



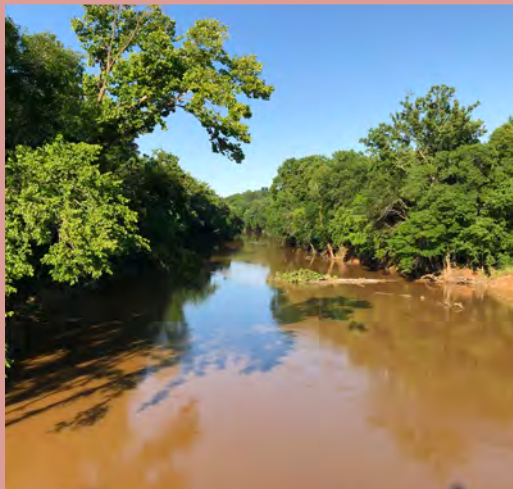
New park facilities in the community will provide kids and families in the community with more places to be physically active.

Short-Term Project 3

This includes Implementation Project 3.2.

UPDATE NATURAL HERITAGE INVENTORY FOR CHATHAM

Chatham County is seeking matching funds from the N.C. Natural Heritage Program to update the inventory of important and endangered natural areas in the county.



The extensive riffle habitat along the Rocky River supports a diversity of native plants and animals.

Short-Term Project 4

This includes Implementation Project 3.3.

PREPARE A COMPREHENSIVE CONSERVATION IMPLEMENTATION PLAN

This project will lay out a road map for how to make tangible conservation improvements in the county. This project has been funded and the County will move forward with hiring a consultant to do this work.



Wildlife and residents alike benefit from the protected natural areas along the shores of Jordan Lake.

Implementing *Plan Moncure*: A Zoning Strategy

BACKGROUND

Chatham County began a full-scale review and update to its zoning, subdivision, and other land use codes in the fall of 2021. The project, referred to as “Recode Chatham,” was undertaken, in part, to effectuate the County vision set forth in *Plan Chatham*, the County’s comprehensive plan completed in 2017.

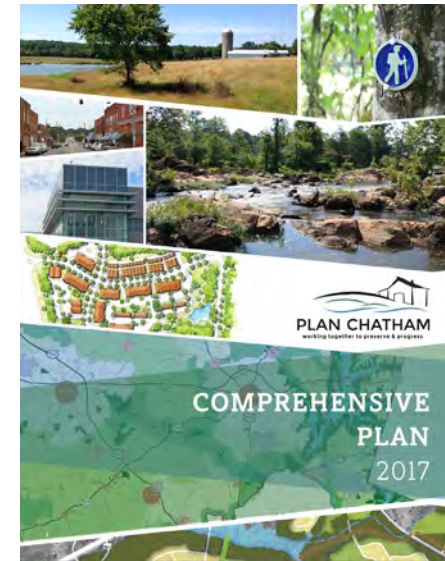
The Economic Development Element of Plan Chatham described the importance of the continuing to develop and promote “megsites” in the County, including the “Moncure Megasite,” to advance ongoing job growth in the area (*Plan Chatham*, ED Policy 3, p. 55). The Moncure Megasite refers to the Triangle Innovation Partnership (TIP) properties along Old US-1. The “TIP West” portion is located north and west of Old US-1, north of its intersections with Pea Ridge Road and Corinth Road. “TIP East” is between Old US-1 and Christian Chapel Church Road.

Economic Development Strategy 3.5 of *Plan Chatham* called for the creation of a small area plan “to give guidance to developers of sites within and at the edges of the megasites.” (*Plan Chatham*, p. 56).

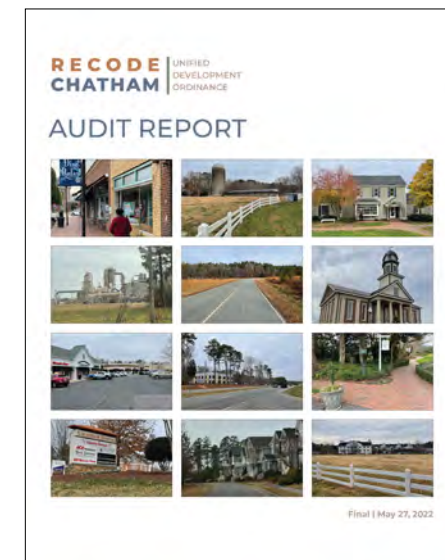
And, finally, Economic Development Action Item 02 of the plan provided:

“After the occupancy of the first major tenant within the Moncure megasite, prepare a small area plan for the Moncure Area. The type and scale of the tenant will help define the housing, commercial, and service needs as well as the demand for infrastructure capacity.”

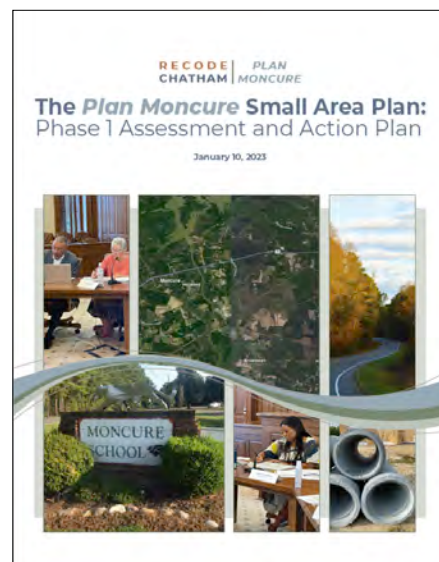
In March 2022, Governor Roy Cooper announced the electric car manufacturer VinFast would soon be locating in southeastern Chatham County on the TIP East site. The announcement created the immediate prospect of as many of 7,500 new jobs in Chatham County, the development of almost 2,000 acres of land, and extensive NCDOT road improvements in this part of the County.



Chatham County’s Comprehensive Plan, *Plan Chatham*, adopted in 2017 laid out a vision for the County for years to come.



The Audit Report, as part of “Recode Chatham,” assessed and laid out recommendations for improving, modernizing, and implementing the County’s land use codes.



The first phase of Plan Moncure kicked off in June 2022 and resulted in completion of an assessment and action plan.

In response, the County Board of Commissioners expanded *Recode Chatham* to include the small area plan (SAP) process required by the comprehensive plan, allowing the community to craft its vision for what southeastern Chatham County should look like, given ongoing growth and, in particular, the anticipated impacts from the VinFast development.

The first phase of “Plan Moncure” kicked off in June 2022 and resulted in completion of an “Assessment and Action Plan,” which was considered and accepted by the Board of Commissioners on December 19, 2022.

At the same time, the board directed the start of Phase 2, the SAP itself, and also passed a motion to process, but delay acting upon rezoning requests received after December 19th until after the anticipated completion of this plan. This was an important step in preserving the “status quo” as much as possible until the community had time to establish what the future of the Moncure area should be, before the Board passed upon new rezoning requests.

Phase 2 began in January 2023 and resulted in this report.



Matt Noonkester presents alternative scenarios for community feedback at the open house on May 24, 2023.

The “Summary of the Planning Process,” above, describes the extensive work the County and its consulting team undertook with the community over a five-month period to arrive at “The Vision for Moncure.” Following a series of resident meetings and open house sessions in the community, the team presented four scenarios for the community’s feedback and input; each offering an “alternative future” for the Moncure area. These scenarios were presented to the public at Moncure School on May 24, 2023.

Based on input received at this meeting, and responses to two public surveys, “The Vision for Moncure” emerged and was approved by the Board of Commissioners in **October 2023**. That Vision reflects the community’s overarching guidance as this plan was developed, as well as a Vision Map of the area.

THE VISION

As is described in detail in "The Vision for Moncure," during the planning process, community feedback included several key points related to the future of Moncure, specifically with regard to future industrial uses, maintaining rural lifestyles and low-density development, concentrating future growth at the nodes of US-1, and protecting open space, historic, and cultural assets in the Study Area. These "Big Ideas" guided the development of the Vision Map, which sets out the location of key place types, consistent with *Plan Chatham*.

However, in addition to the place types from *Plan Chatham*, this plan establishes a new place type designated as "Neighborhood Residential," specifically in response to community feedback received and the desire to direct more dense, compact single-family development away from the County's more sensitive conservation and rural areas.

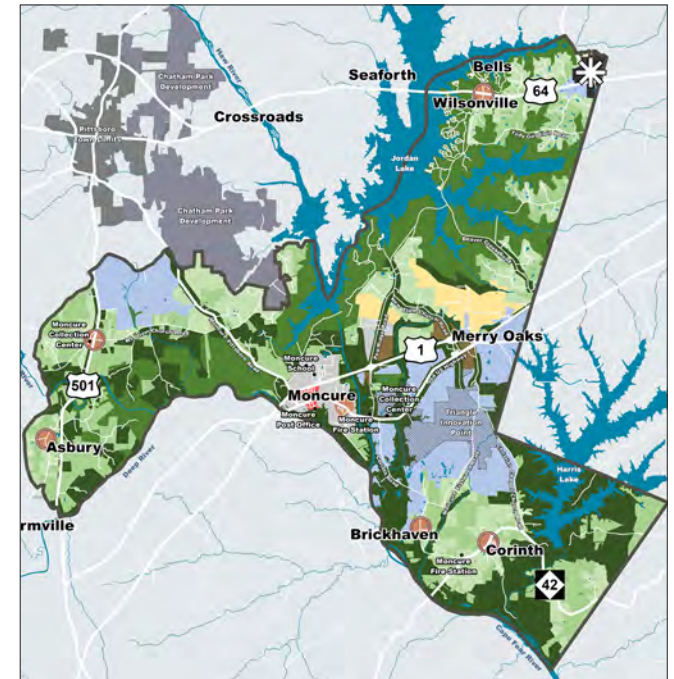
The policies associated with the Neighborhood Residential are set forth in "The Vision for Moncure," and will be applicable to areas on the Vision Map designated Neighborhood Residential.

THE VISION MAP

The Vision Map is the product of public input received during the SAP, the consultant team's market study, and scenario planning during *Plan Moncure*, and is consistent with the place type framework established in *Plan Chatham*.

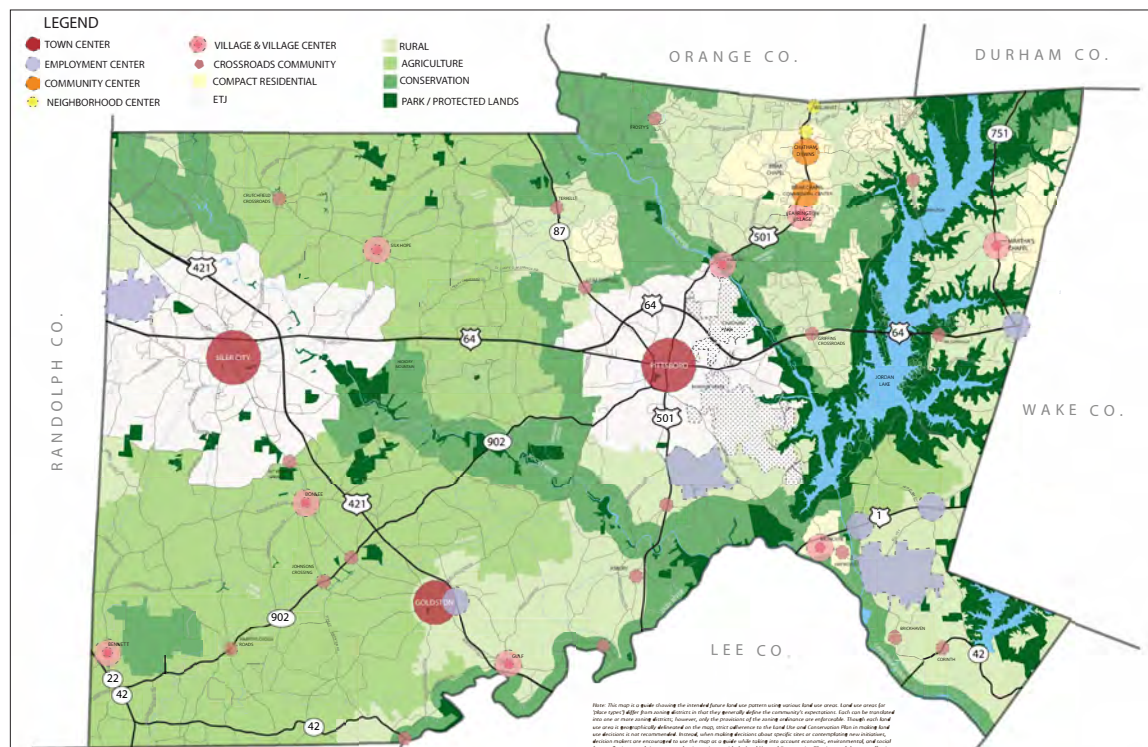
The Vision Map is not parcel-specific, but rather identifies general areas in the County to which the defined place types would be compatible. Therefore, future zoning map considerations will include, among other things, place types applicable to the property (or *potentially* applicable, depending on specific characteristics), nearby associated place types, ongoing and emerging land use trends at the time, and adopted plan policies underlying the place types.

Figure X. Plan Moncure Vision Map



The *Plan Moncure* Vision Map assigns the recommended place types for the geographic areas within the *Plan Moncure* Study Area. Once adopted, this map constitutes the Future Land Use and Conservation Map for properties in and proximate to the Study Area.

Figure X. Plan Chatham's Future Land Use and Conservation Map



Plan Chatham's Future Land Use and Conservation Map depicts the various place types throughout the County, prior to *Plan Moncure* and the adoption of the Vision Map applicable to this Study Area.

A ZONING STRATEGY FOR IMPLEMENTING THE VISION FOR MONCURE

Having developed a vision for its future, how then does the community effectuate that vision? In the case of the County, a key tool is the zoning map, which is a direct regulatory mechanism for applying land use “rules” consistent with the “vision.” Simply put, the Vision Map will inform County land use decisions in the SAP Study Area. In fact, the place type designations on the Vision Map amount to an amendment to the Future Land Use and Conservation Map adopted in the County’s 2017 comprehensive plan (known as *Plan Chatham*), as to lands within the SAP Study Area. *Plan Chatham* describes the place types and associated policy concepts that are applied through the Vision Map, with one exception.

In accordance with the community's clear desire to maintain a rural, large-lot feel in much of the Study Area, the SAP recommends one new place type, called Neighborhood Residential. The Board of Commissioners' vision for this place type is outlined in "The Vision for Moncure," above. The previously-adopted policies for the other place types are included in the text of *Plan Chatham*.

Rezoning Before and After Completion of the Unified Development Ordinance

Since *Recode Chatham* has been ongoing during the SAP, the question arose of how future rezonings in the Study Area would be processed. The County has intended to revisit the zoning map after it completed *Recode Chatham*, so any new policies related to land use and conservation would be reflected in a new countywide zoning map.

However, with VinFast potentially moving on a different timeline, the County will inevitably receive individual property owner rezoning requests in the near-term. This section describes the approach the Board of Commissioners adopted along with this plan.

First, rezoning requests for properties within the Study Area, filed prior to completion of *Recode Chatham*, will be evaluated consistent with this small area plan, including the “Vision for Moncure,” and the Vision Map adopted in this plan. This will involve the County applying the Vision Map to the zoning district categories in place when this plan was adopted, which will likely change upon the adoption of *Recode Chatham’s* “Unified Development Ordinance” (the “UDO”), anticipated for completion in 2024.

In short, the *Plan Moncure* Vision Map will be applied as the Future Land Use and Conservation Map for lands in the Moncure Study Area, immediately after its adoption, that is, prior to and following completion of the UDO.

REZONING REQUESTS

Rezoning requests following adoption of *Plan Moncure* will be subject to the policies set out in this plan and should consider distinctions, as applicable, between standards of countywide applicability and those appropriate within the *Plan Moncure* study area, based on the plan vision.

The UDO and *Plan Moncure*

In March 2023, during Phase 2 of the *Plan Moncure* small area plan, the UDO consultant team, led by White & Smith, LLC, presented “Module 1” of the UDO to the Board of Commissioners and the Planning Board for review and feedback. Module 1 included drafts of zoning categories and associated compatible land uses different than those in effect when *Plan Chatham* was completed.

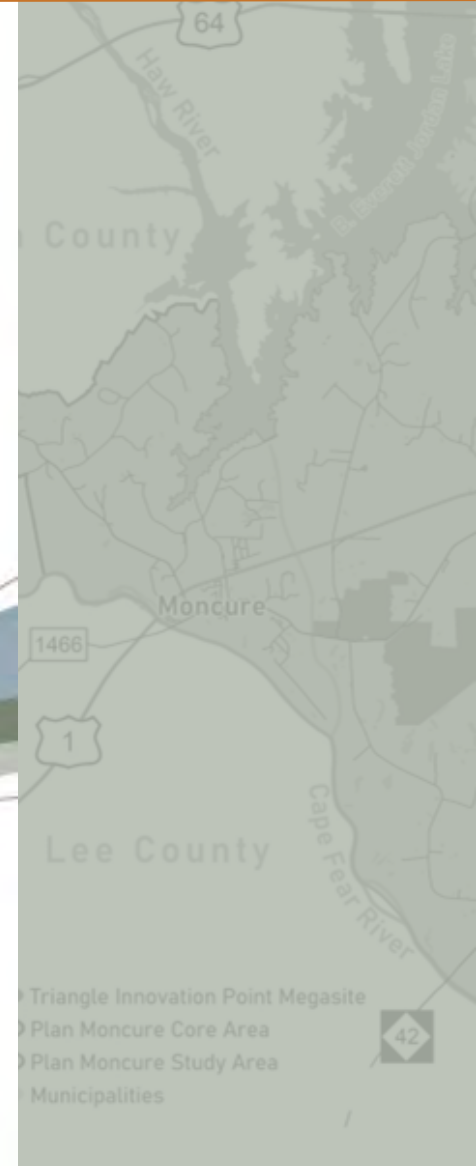
As was anticipated in *Plan Chatham* in 2017, the *Plan Moncure* planning process has refined the land use framework assumed in *Plan Chatham*, which, of course, had informed the County’s work on the UDO, including Module 1’s new zoning framework, before this SAP was completed. Therefore, this report recommends revisiting the draft zoning districts and uses prepared for Module 1 of Recode Chatham to take into consideration the “Vision for Moncure” and associated Vision Map. For example, the County may consider:

- Whether the “Neighborhood Residential” place type policies included in this plan would be appropriate in other parts of Chatham County;
- Whether or when to revisit the *Plan Chatham* Future Land Use and Conservation Map;
- Whether the unique characteristics of the Moncure area, including the US-1 corridor, require distinct zoning standards and alignments in order to effectuate the “Vision for Moncure;” or
- Developing the public process applicable to any “UDO-related” revisions to the zoning map, the Future Land Use and Conservation Map, or the *Plan Moncure* Vision Map.



EXISTING CONDITIONS SUMMARY

03.21.2023



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Introduction

The characteristics that define the Moncure area as well as the emerging trends will present both issues and opportunities over the next few decades. An understanding of them will help the community define its vision for the future, determine the appropriate steps forward, and manage change effectively.

A summary of the existing conditions in 2023, this report highlights the major features of the area, including its people, special places, economic conditions, and the natural and built environment. It also notes specific challenges the community is facing in connection with anticipated growth over the next few decades, including the following:

- Retaining the community's identity and sense of place
- Mitigating impacts of industrial development on the environmental and cultural assets
- Addressing traffic congestion and safety on US-1 and connecting roads
- Managing infrastructure as demands for new facilities and services increase with new development
- Maintaining affordability as real estate values (and housing prices) climb
- Ensuring the longevity of local businesses
- Keeping and creating jobs, ensuring employment opportunities and higher wages for residents
- Facilitating connectivity in terms of mobility as well as social, economic, and environmental networks

The sections of the report that follow will help stakeholders, planners, and decision makers explore these issues in more detail and lay a foundation of understanding for the community planning effort.

Study Area

General Area of Study

The study area, depicted in the Study Area Map, is the subject of the Plan Moncure planning effort. It is the unincorporated area in the southeastern portion of Chatham County. It encompasses the historic community of Moncure, hence the name. The area to be studied, however, extends well outside of the geography most county residents associate with Moncure, as County leaders are anticipating the need to address the issues and opportunities of potential growth in this broader area of the county over the next decade or more.

For purposes of Plan Moncure, the study area is defined as the area within which future land use will be depicted in the final plan. It is restricted to Chatham County's planning and zoning jurisdiction and includes related places that are not addressed by other adopted land use plans. As shown in the Study Area Map, it is delineated as follows:

- the County limits form the south and east sides;
- the US-501 corridor defines the western edge; and
- the Town of Pittsboro's extraterritorial jurisdiction (ETJ), Jordan Lake, and the study area of the Chatham Cary Joint Land Use Plan, in combination, demarcate the northern boundary.

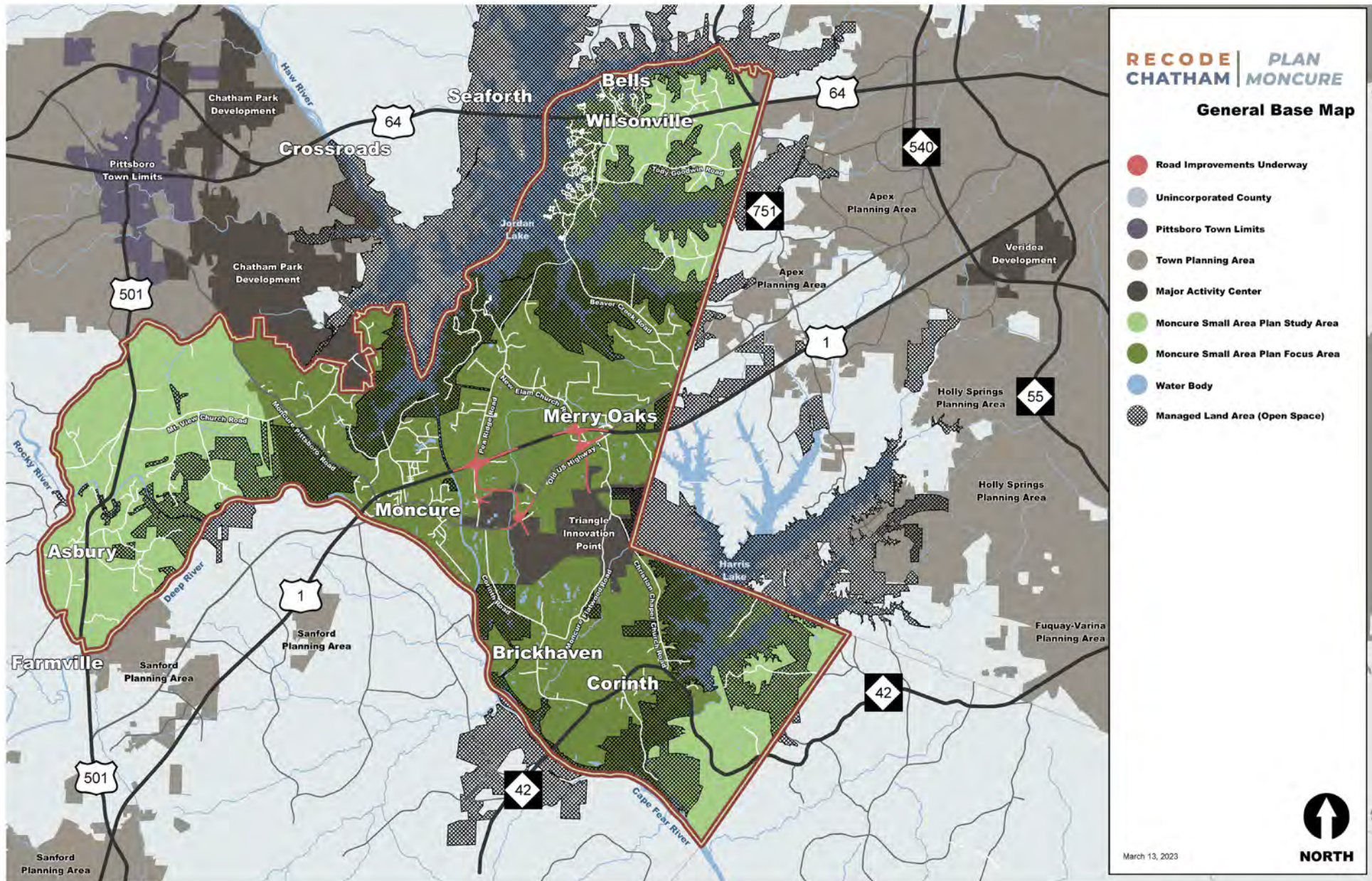
Focus Area

The Focus Area, represented in a brighter shade of green on the map, is the area that is anticipated to be most affected by the changes resulting from public and private investments, including the investment being made by the VinFast electric vehicle manufacturing company and modifications to the road network being made by the North Carolina Department of Transportation (NCDOT). In the area delineated, the County is seeking to understand relationships between existing and potential future development as well as between the built environment and the natural resources.

“Low light pollution, star gazing, migratory birds, rural character, small town feel, Moncure School, lake access with boat launch, rivers, and trails.”

---Residents of Moncure Area
(a list of some of the reasons people come –and stay–in the area)

Study Area Map



Population & Employment

Population

Population in Chatham County, the study area, and Moncure is projected to grow faster than in the Triangle overall.

EXISTING POPULATION

While there are 4,000 residents in the broader study area, there are fewer than 800 people residing in the Moncure area.

DEMOGRAPHICS

Compared to the study area as a whole, the immediate Moncure area has

- a larger percentage of Black (16%) and Hispanic (15%) residents
- moderate incomes with a low poverty rate (3.5%)
- lower education attainment

POPULATION PROJECTIONS

The population of the study area is projected to grow between 2023 and 2040 by approximately 35% (or a rate of 1.75% per year). **This is much higher than the projected growth for the Triangle region, which is approximately 24%.**

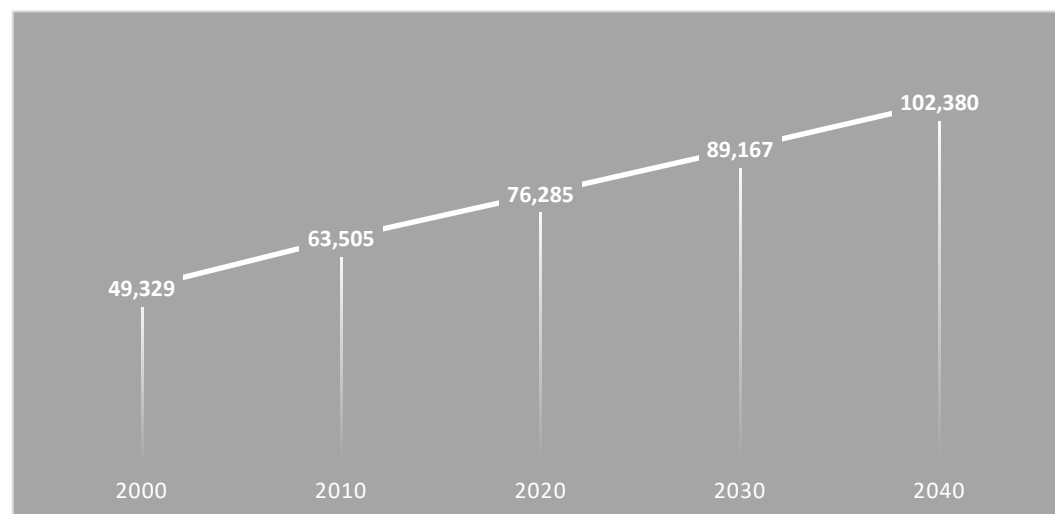


Figure 1. Chatham County Population Historical and Projected, 2000-2040 (Source: NC Office of State Budget & Management)

Table 1. Population Growth Projections, 2023-2040

	Total Percentage Increase	Annual Percentage Increase
Triangle Region	24%	1.26%
Chatham County	34%	1.76%
Southeast Chatham	32%	1.66%
Moncure Area	39%	1.97%

Employment

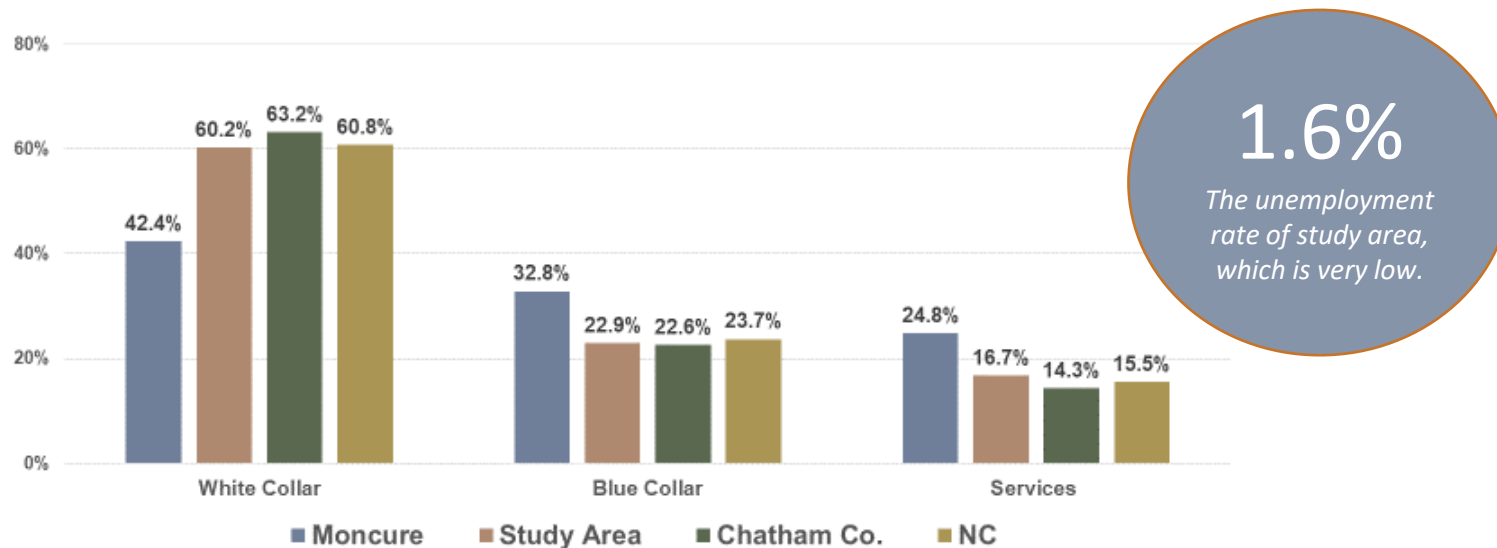
Moncure is a small, unincorporated community along US-1 with an industrial presence nearby. Moncure and the study area have small labor forces with very low unemployment rates.

MAJOR INDUSTRIES IN STUDY AREA

The Moncure area is home to several industrial operations, including the major employers listed to the right. The first two in the list employ more than 100 persons each.

JOB GROWTH

Chatham County is projected to grow jobs by 16% between 2023 and 2040, which is faster than the Triangle or Triad regions. The study area and Moncure are projected to have much slower job growth, but those estimates do not account for major announcements made recently, such as VinFast and FedEx.



Source: ESRI Business Analyst, accessed Dec 2022 – Feb 2023

Figure 2. Employed Population by Occupation Group*, 2022

Top Employers:

- 1 Arauco
- 2 Southern Veneer Specialty Products
- 3 Triangle Brick
- 4 General Shale Brick
- 5 3M

...and FedEx distribution center coming soon.

Large manufacturing employers nearby include Caterpillar, Pfizer, and Bharat Forge.

Historic & Cultural Resources

There are several important historic communities and resources in the Plan Moncure study area. These include structures, districts, communities, and other special places. Some are officially listed on the National Register of Historic Places, while others have been identified in other ways as important to the culture and community in and around Moncure.

Historic Communities

MONCURE

The Moncure community itself is one of several unincorporated areas within the Study Area of cultural significance. Founded in 1881, Moncure once served as the most landward inland port in the state, linked to the Atlantic by steamship.

By census district, Moncure includes lands north and south of U.S. Highway 1 and is bound on the west and east by the Deep and Haw Rivers.

The Sprott Youth Center and a U.S. Post Office are among important locations at its historic center. Moncure continues to have a vibrant artistic community as well.





Note: In addition, other unincorporated communities within the study area include Brickhaven, Corinth, and Griffins Crossroads.

HAYWOOD

Haywood is another community of historic significance, located within Moncure, southeast of Moncure's center and west of the Haw River. Haywood was one of the locations considered for the state capital, in 1788, , as well as for the new University of North Carolina in 1792.

Haywood remains a distinct community in this part of Chatham County. Several historic churches remain active in Haywood, providing an ongoing community focal point.

Haywood's location close to the confluence of the Haw and Deep Rivers gave it an important role in state history in the 18th and 19th centuries.

MERRY OAKS

The rural community of Merry Oaks was formerly a railroad town within the Cape Fear Township. The Merry Oaks area parallels the former Seaboard Airline Railroad tracks and Old U.S. Highway 1.

The community still has a number of surveyed and eligible historic properties including Merry Oaks Baptist Church, Merry Oaks Post Office, the Edwards House, and Yates Store.

Recent Surveys

VinFast Site

Recent surveys show no known remaining historic or cultural resources on the VinFast site itself (TIP East).

NCDOT Historical Architectural Resources Survey (09/2022)

The North Carolina Department of Transportation conducted a historic architectural resources survey of the properties that could be impacted by the department's planned improvements, referred to as the Triangle Innovation Point Roadway Network Improvements project. The resulting report was published in September 2022 and identified sixteen (16) resources warranting intensive National Register eligibility evaluation. Others surveyed did not warrant further consideration, the report concluded.

Of the 16 resources identified for further evaluation, the following were recommended as eligible for NHRP Listing:

- Edwards House
- Yates Store
- Jack Womble's Filling Station

NCDOT must avoid "adverse effects" on these properties as it completes its improvements.

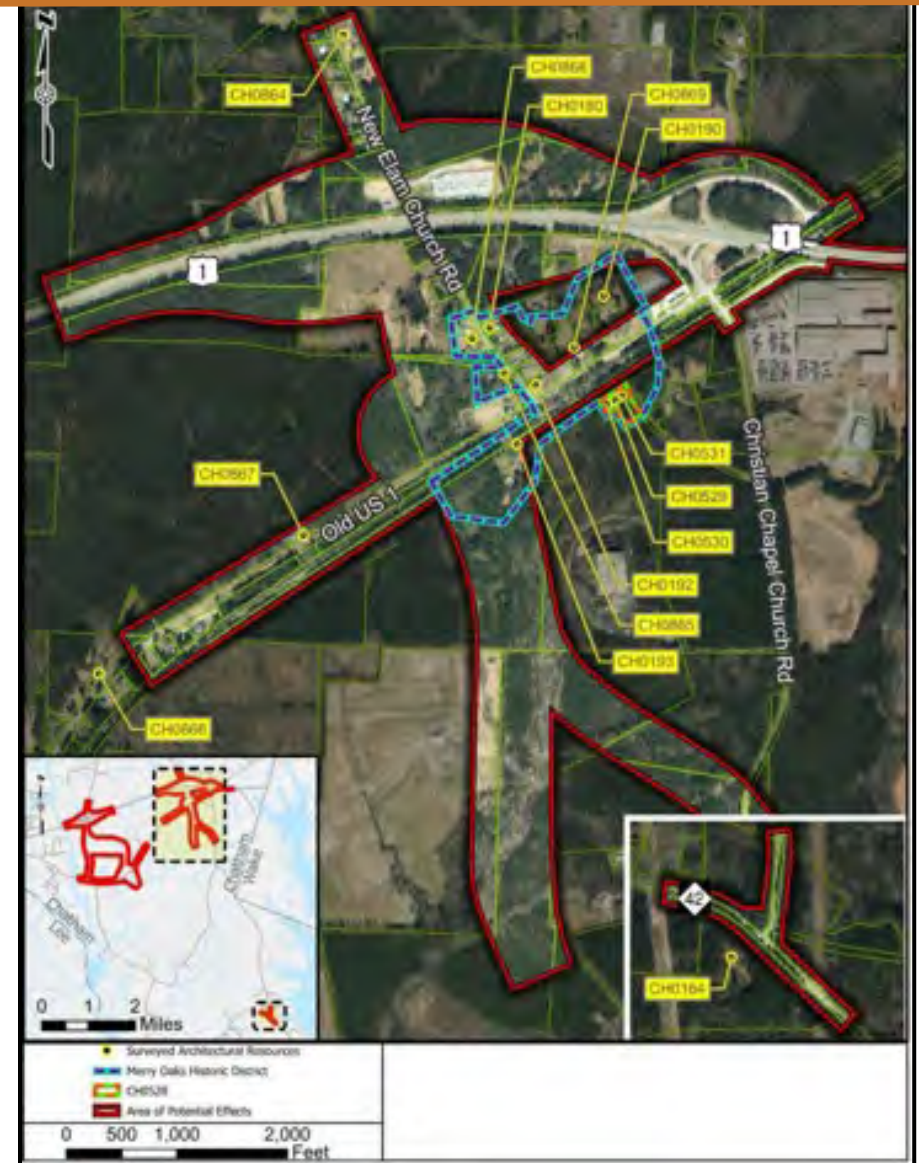


Figure 3. Survey Results Map, Historical Architectural Resources Survey

Historic Resources Maps

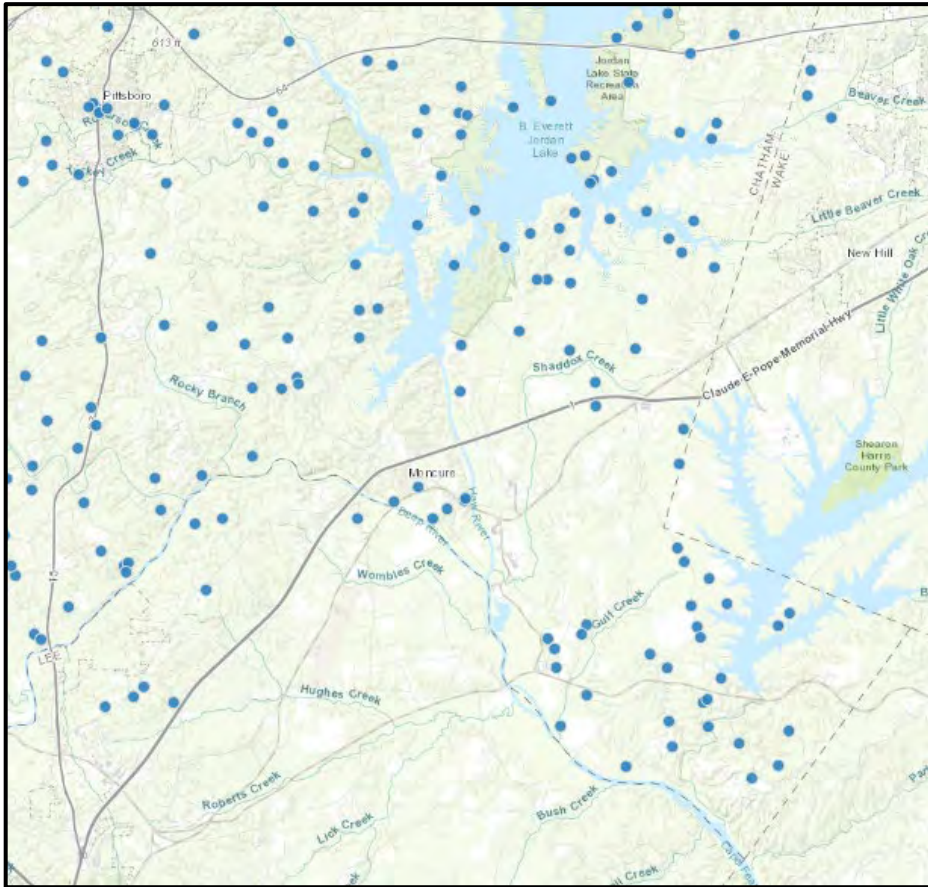


Figure 4. Cemeteries: Chatham County
(public, family, private, Dec. 2020)

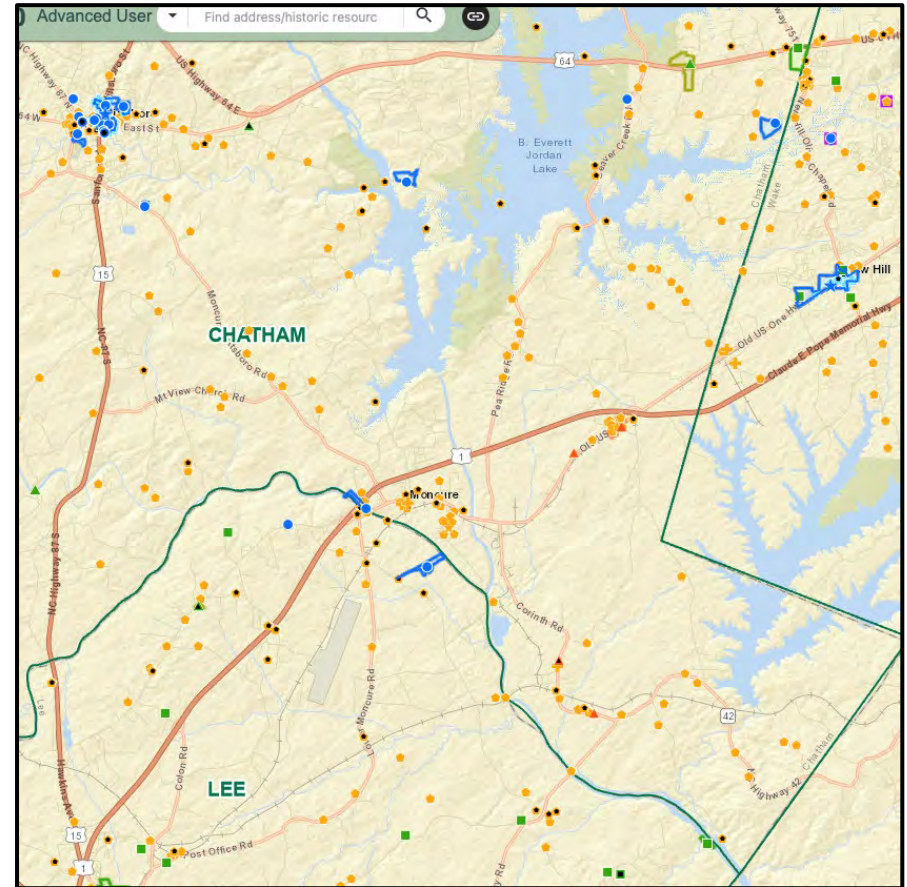


Figure 5. Historic Resources: State Historic
Preservation Office

NCDOT *Historic Architectural Resources Survey*



EDWARDS HOUSE



YATES STORE



NCDOT *Historic Architectural Resources Survey*



JACK WOMBLE'S FILLING STATION on Old US-1

Environment / Natural Resources

The study area is home to numerous environmental resources including important surface water bodies, flora, and fauna. The County is also home to a number of threatened or endangered species and designated Natural Heritage Areas, most of which are located on private lands.

Water Basin & Watersheds Areas

The entire County is located within the Cape Fear River Water Basin. However, the County is divided into a number of different watershed areas for purpose of implementing state and local watershed policies.



WATERSHED PROTECTION

As shown in the map on the following panel, the Study Area includes lands in several different major watersheds.

Chatham County has a Watershed Protection Ordinance that applies countywide, including the entirety of the Study Area.

This ordinance limits impervious surface area on developed property and requires riparian buffers in the watersheds in County's jurisdiction.

In addition, the County's Watershed Protection program and Ordinance delineates several distinct watershed areas, each with different applicable standards.

As is shown on the panel below, the following watershed areas are found within the Study Area as they stand today:

- Critical Area
- Local Watersheds
- RCSA
- River Corridors
- Watershed-IV PA
- Jordan Lake Watershed Areas

SURFACE WATERS

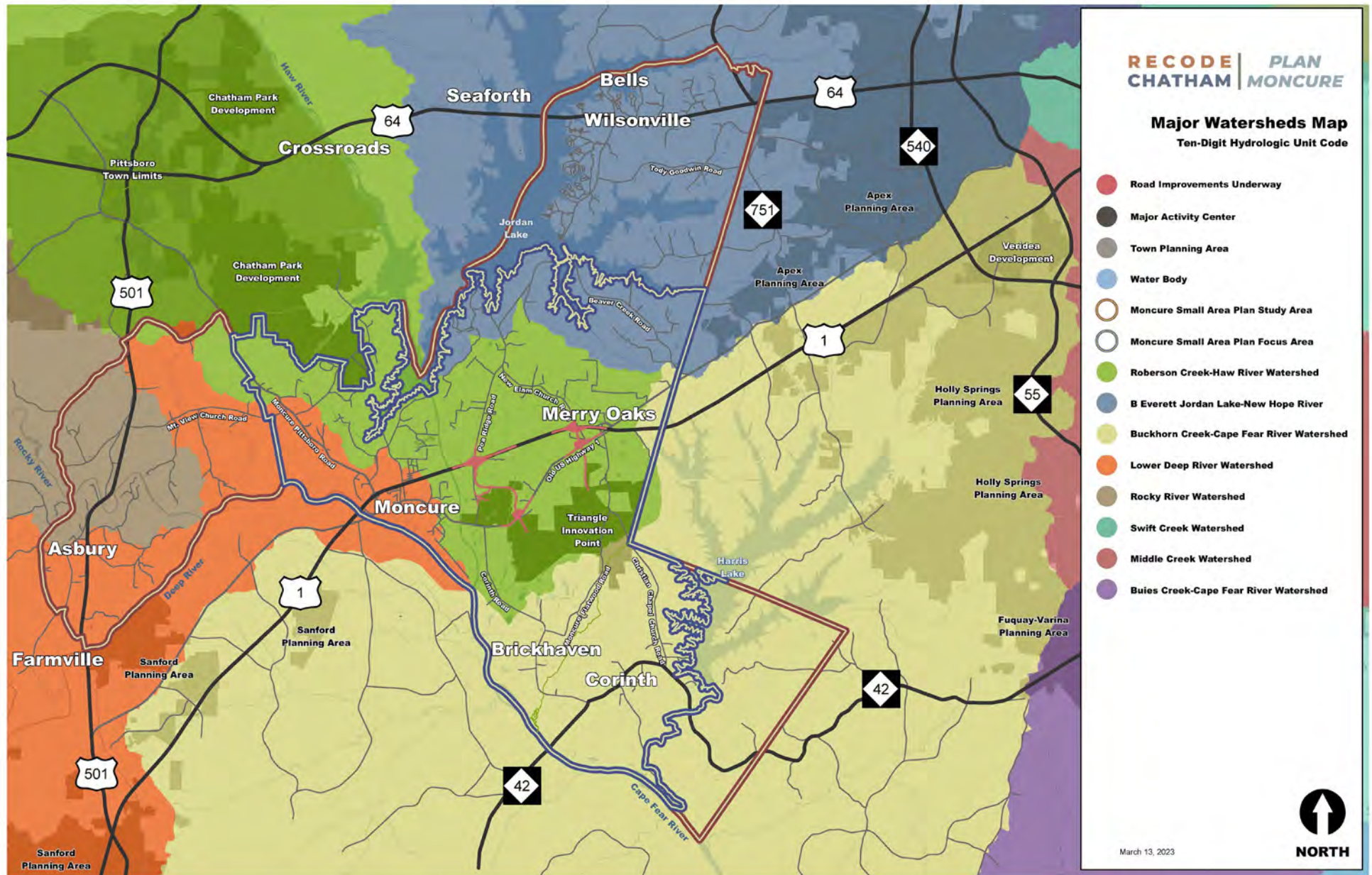
In addition, as the map on the panel below, following the County Watershed Protection Areas, illustrates, the surface water classifications present in the Study Area. These include lakes, streams, rivers, water supply areas, and water supply sources.

In addition, the map illustrates known road improvements underway and major activity centers.

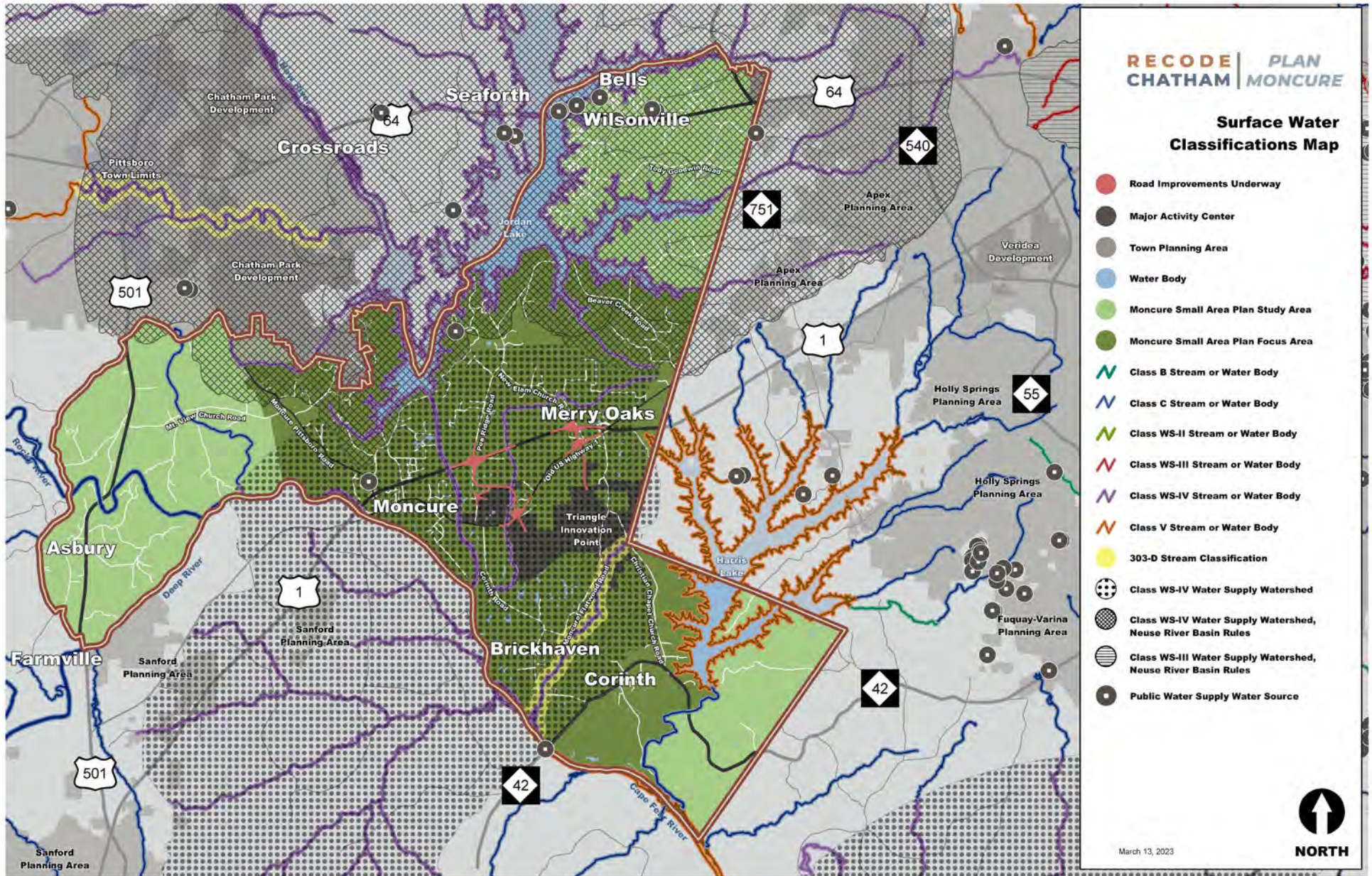
The major watercourses in the Study Area include:

- Haw River
- Deep River
- Cape Fear River
- Shaddox Creek
- Weaver Creek

Major Watersheds Map



Surface Water Classifications Map



Natural Heritage Program

The Program identifies more than 2,400 areas in North Carolina as sites containing special biodiversity significance, due to the presence of rare species, unique natural communities, important animal assemblages, or other ecological features.

Significant lands within the study area have been designated as Natural Heritage Program Areas and part of the NC Department of Natural Resources.

The Plan Moncure study area contains a range of categories of Natural Areas, from Exceptional to General, including the following examples:

- Exceptional (e.g., Lower Deep River Slopes)
- Very High (e.g., Haw River Levees and Bluffs)
- High (e.g., Haw River Dicenetra Slopes)
- General (e.g., Cape Fear River/McKay Island Floodplain)

The Study Area also contains a number of Managed Areas, including the following examples:

- Deep River State Trail (State owned)
- Jordan Dam and Lake (Federal owned)
- Harris Game Land (State owned)
- N.C. Division of Mitigation Services Easement (State owned)
- Chatham Game Land (Private owned)

Managed Areas designated as game lands are depicted on the Managed & Protected Lands Map.



Figure 6. NC Natural Heritage Program (Natural Areas)

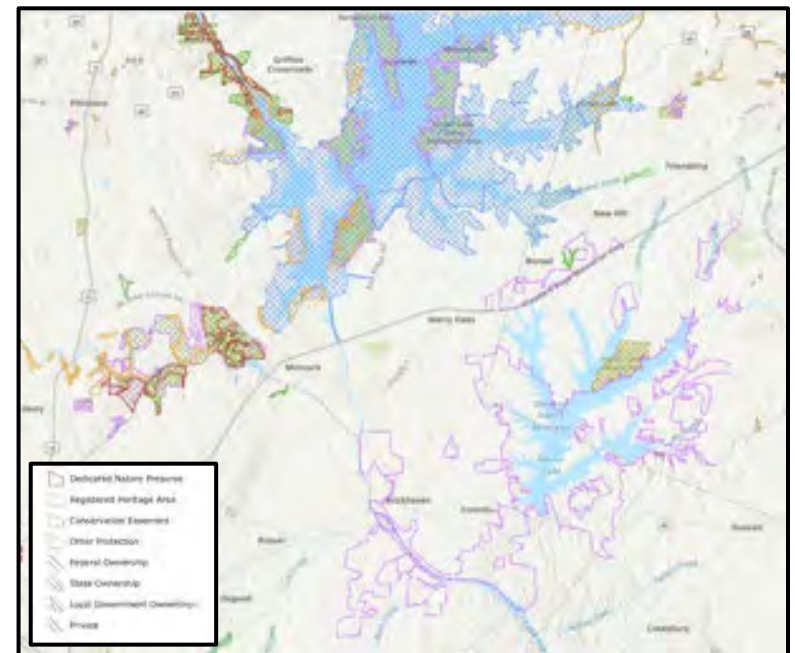
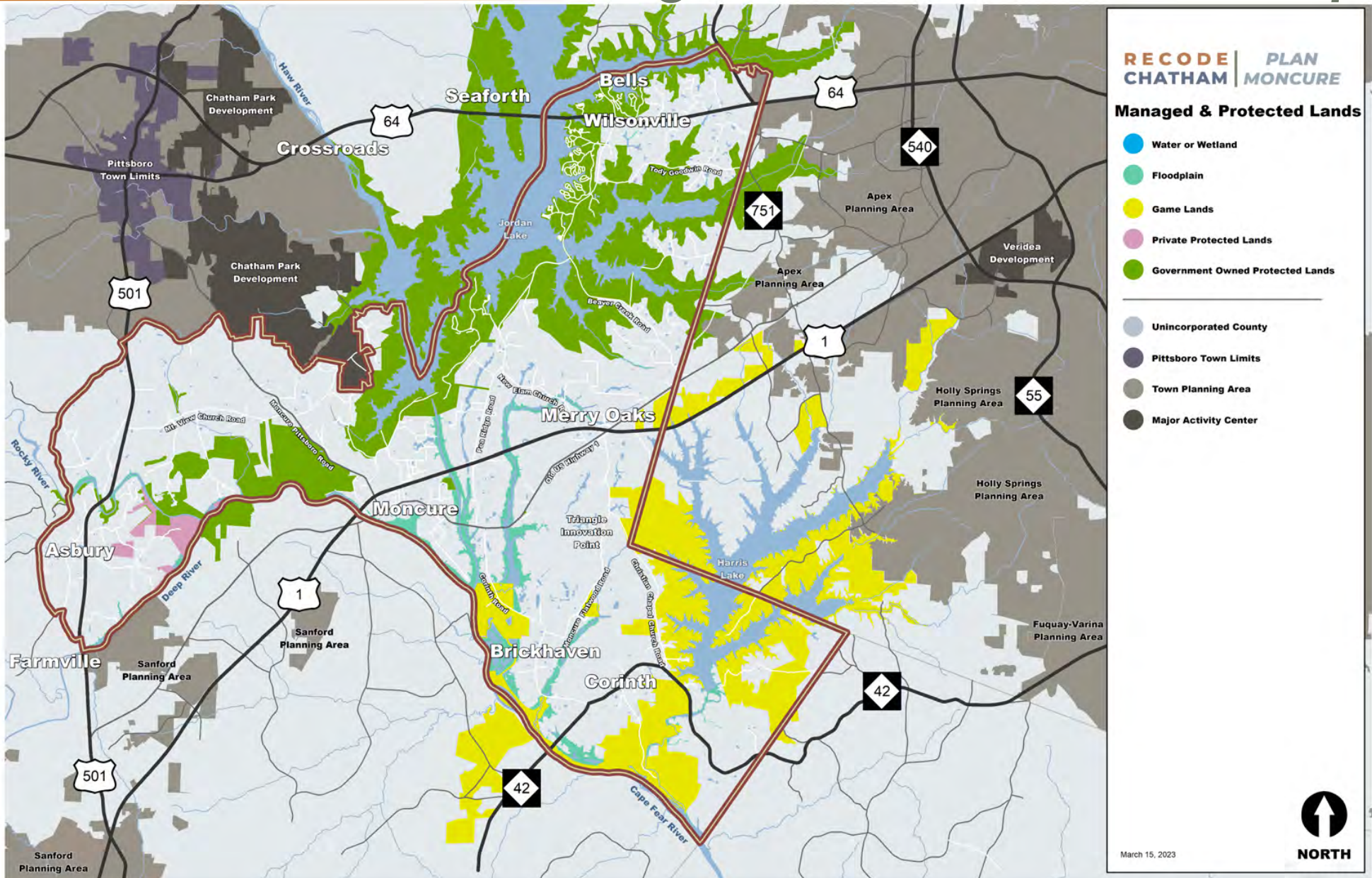


Figure 7. NC Natural Heritage Program (Managed Areas)

Managed & Protected Lands Map



Land Use

Development Pattern

Moncure is presently a “rural crossroads” community along US-1. It is an unincorporated area of Chatham County.

Based on Chatham County tax parcel data, the majority of land in the study area is currently being utilized for agriculture, which includes timber operations and management. Agricultural uses account for approximately 51% of the land area. Protected open space is the next largest land use at 23%, and another 3% is comprised of surface water and rights-of-way. Most of the “conservation” acres are part of the Jordan Lake State Recreation Area as well as large tracts of land in conservation easements held by land trusts. Residential development occupies roughly 13% of the study area. Commercial and industrial areas, account for less than 10% of the land area. Only 3% of the study area is considered “vacant.”

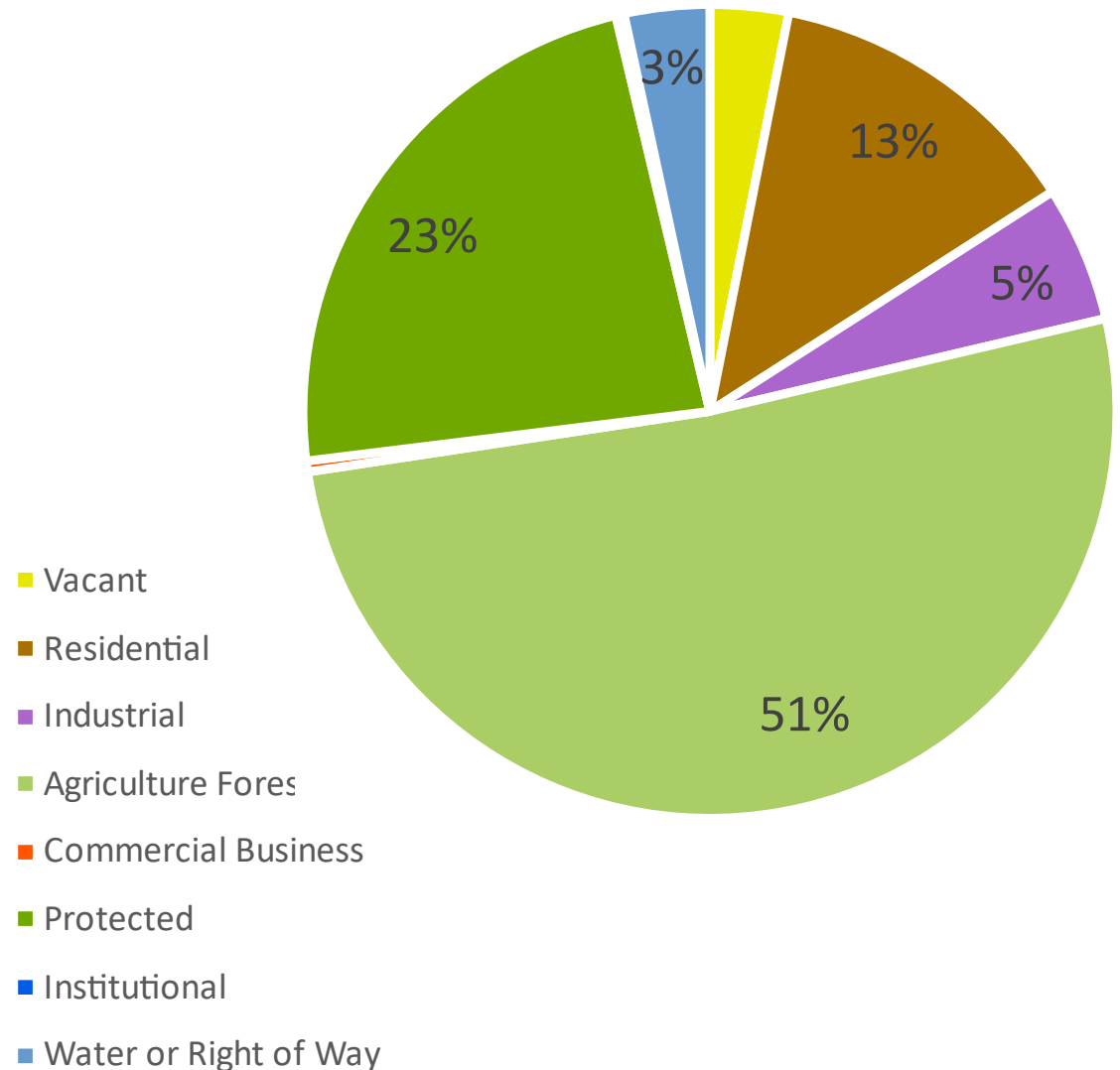
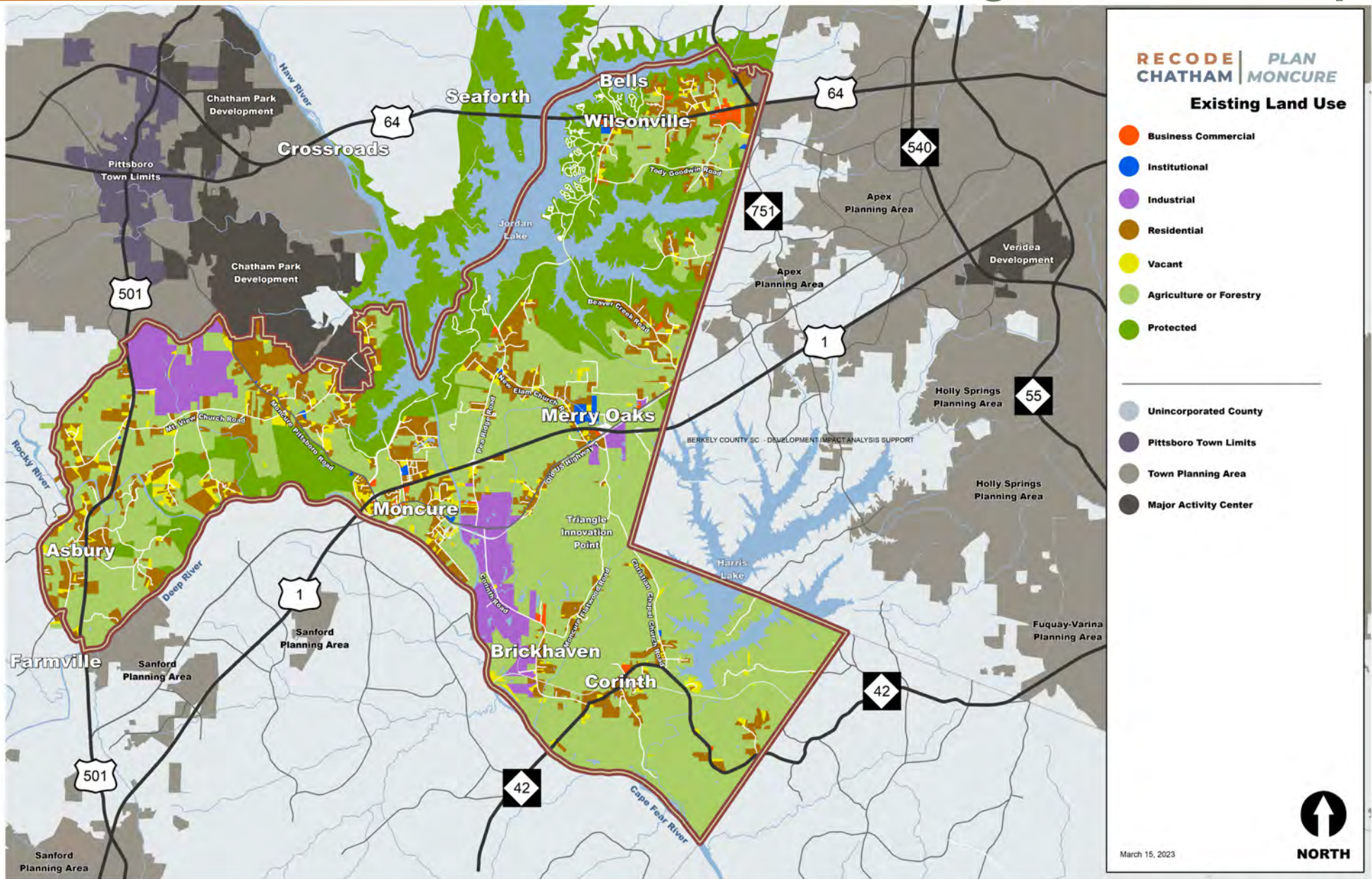


Figure 8. Existing Land Use as a Percentage of Study Area

Existing Land Use Map



Key Places & Uses

Considered to be one of the more rural areas of Chatham County, Moncure has been the location of selected kinds of development dating back to the later 19th century, including homes, small-scale commercial businesses, and large-scale industrial activity. While housing is part of the development pattern, many nonresidential uses occupy sites in the area. The following describes the variety of places within the study area.

AGRICULTURE

Parcels devoted to agriculture comprise almost half of the study area. In addition to cropland and pastureland, working lands include forests that are managed for timber production. From small-scale growers focused on flowers and fresh produce to larger establishments that produce soybeans and hay, farmers in this part of Chatham County contribute to the local economy while maintaining a thriving ecosystem.

COMMERCIAL DESTINATIONS

Commercial development in the study area is nearly indiscernible on the Existing Land Use Map. The businesses in this category are generally small convenience retail stores and gas stations situated in the US-1 corridor where road access and visibility ensure a steady stream of patrons. Other commercial uses include artists' studios, small-scale production shops (e.g., cabinet makers), veterinary clinics, small engine repair businesses, and wedding venues. Lodging is available in the form of inns, bed-and-breakfasts, vacation rentals, and campgrounds for recreational vehicles.

INDUSTRIAL CONCENTRATIONS

Major industrial development is concentrated in two parts of the study area. In the north near Pittsboro is a quarry operated by Luck Stone Corporation and one of 3M's plants. Drawn to the US-1 corridor for the highway and rail access, several industrial operations have located in the southern half of the study area. Among them are Triangle Brick and General Shale Brick. Triangle Brick opened its Merry Oaks facility (near Exit 84 along US-1) in 1991 and, with one of the largest kilns ever built in the US as well as an automated manufacturing process, the plant produces 240 million bricks annually.





ABOVE: Churches in the community are central to civic life. While some residents in the area come together through faith, many are united in their appreciation for the natural environment. Both are key components of the study area. (Image source: Nealon Planning)

OPPOSITE PAGE: Brick manufacturing has been a local industry for decades; flowers are among the products of local agriculture; convenience stores are located along Old US-1 and close to US-1. (Image source: Adobe Stock)

BELOW: A home in Moncure; a paddler observing an eagle at the edge of Jordan Lake. (Image sources: Zillow,)



NEIGHBORHOODS

Most of the residential units in the study area are situated on large parcels that are not part of neighborhood. However, over the last 50+ years, subdivisions with lots ranging in size from one acre to more than 10 acres have been developed on the north side of US-1. Many of these lots accommodate large homes that differ from the houses in the neighborhood in Moncure's historic center, where the typical lot size is half an acre. The campgrounds have satisfied some demand for temporary housing for workers at the Shearon Harris Nuclear Plant.

COMMUNITY FACILITIES & AMENITIES

Parks managed by the State are located at the edges of the study area and along the waterways. They provide a range of recreational opportunities for residents but are also destinations for tourists seeking places to boat, fish, swim, and camp. Civic and institutional uses complement the many uses in the study area. Many are part of Moncure's historic center while others are dispersed throughout the study area. Some of the key facilities in the study area include the following:

- Moncure School – This school has served the Moncure community with public education for generations. Today, the school has an enrollment of almost 250 students and offers instruction for pre-kindergarten through eighth grades.
- Jordan Lake State Recreation Area – A popular destination for camping, boating, fishing, hiking, swimming, and bird watching, this NC-maintained land provides visitors access to the 14,000-acre lake. The dam and surrounding lands are managed in partnership with the U.S. Army Corps of Engineers.
- Sprott Youth Center – The gymnasium, built in 1936 on the Old Moncure School property, was renovated to support the development of the youth in the community through academics, health education, athletics, and fellowship activities.
- Moncure Fire Department – Two stations (8 and 14) employ full-time firefighters. In addition to providing emergency response services, the station hosts events and educational activities.

Development Status

The study area is comprised of 67,356 acres. Some of that land (12%) is already developed and not likely to redevelop. Another 29% is protected through conservation easements and other protection mechanisms. The remaining land is either undeveloped or underdeveloped. These two areas combined encompass 35,907 acres. Figure 9 shows the distribution of these categories of development status, and the same categories are mapped in the Development Status Map. The status of parcels in the study area can be described as follows:

- **UNDEVELOPED** – With few or no structures, parcels of land remain vacant or relatively undeveloped. (Note: These parcels include agricultural lands that are managed for timber, cultivated fields, and pastureland.)
- **UNDERDEVELOPED** – The level of investment is low and the property is therefore ripe for redevelopment.
- **DEVELOPED** – The level of investment is high and such parcels are not likely to redevelop over the next 20 years.
- **PROTECTED** – Parcels of land are protected as public parkland, privately-owned conservation easements, etc. (Refer to the Managed Land on the Study Area Map.)

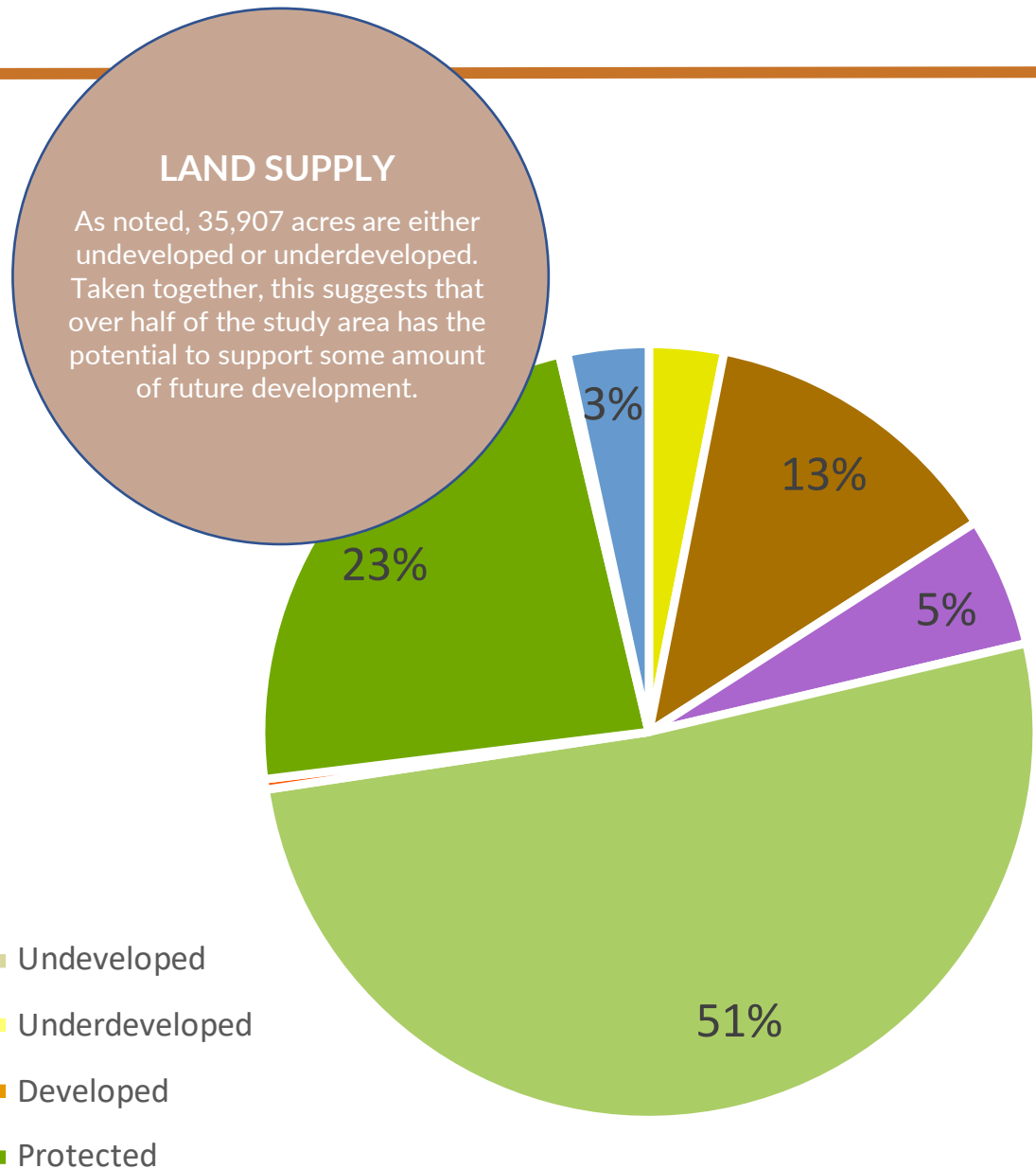
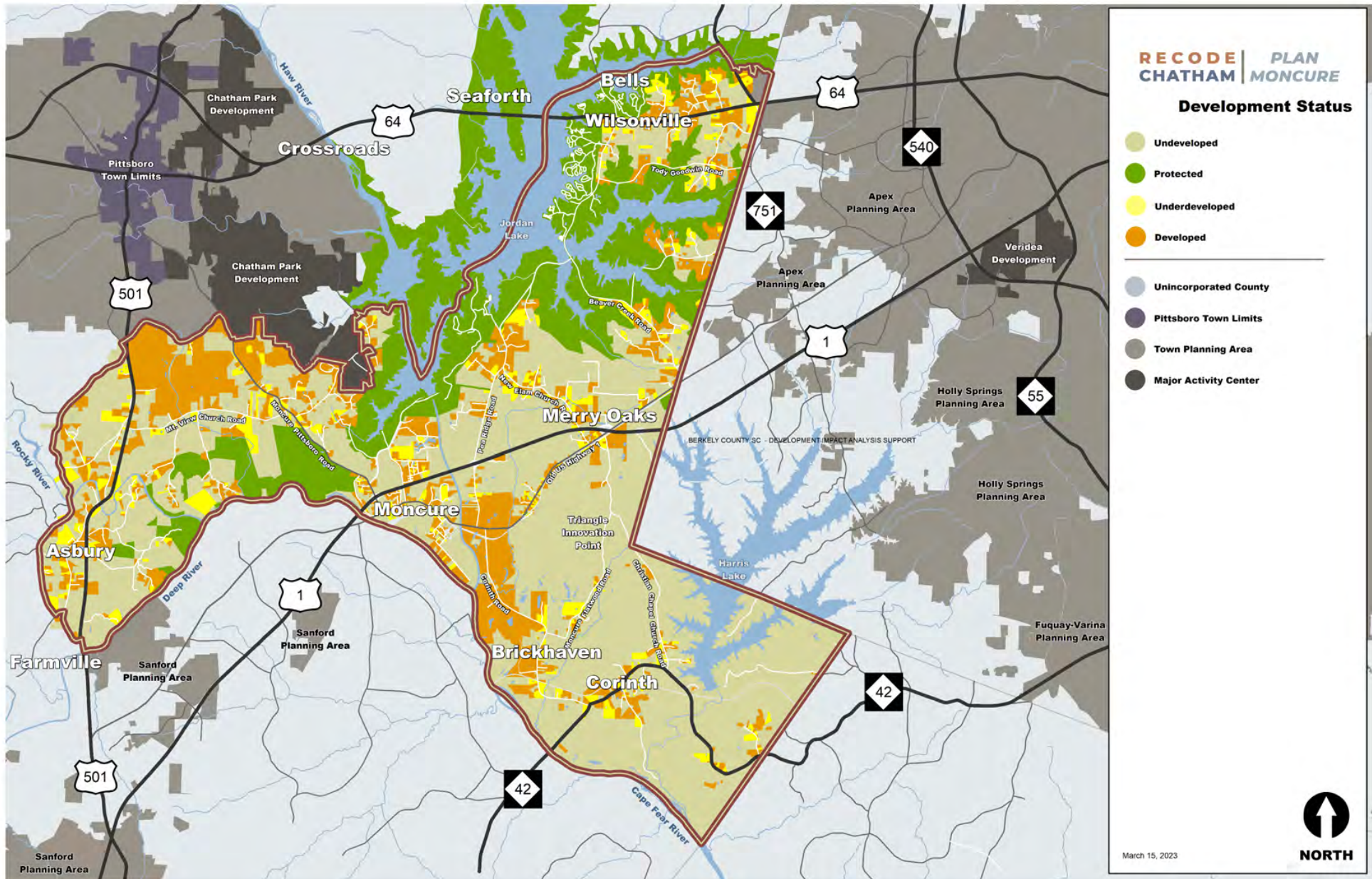


Figure 9. Development Status as a Percentage of Study Area

Development Status Map



Land Suitability

Some of the land that comprises the Land Supply is better suited to some uses than others. For example, parcels near the heart of Moncure are desirable for residential development. The topography and distance from the highway network are two factors that make those sites less suitable for industrial development that seeks large areas of flat land close to truck routes. Some parcels are not highly suited for any future development. To identify the areas to which future growth will be drawn, a suitability analysis was conducted. From this analysis, a realistic delineation of potential development areas can be determined.

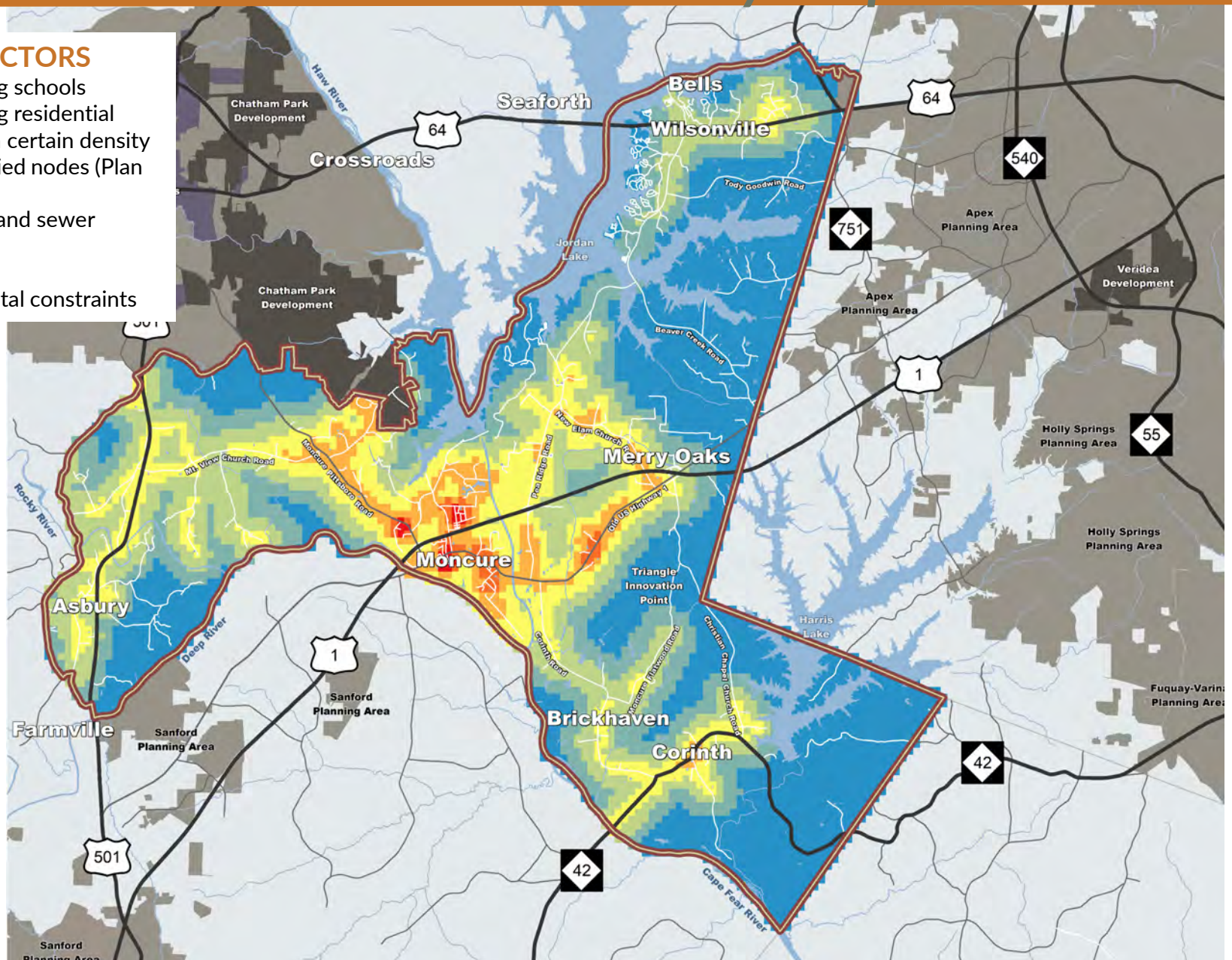
The suitability of land refers to the capacity of land to support a type of land use. This is based on various attributes, such as availability of infrastructure, access, parcel size, topography, environmental conditions, and proximity to other uses. Regulatory constraints can also have an impact on suitability. (Note: Only State and Federal regulations are considered in the analyses. Current zoning is not a factor.) All such factors make a parcel more or less attractive for future growth. In the three maps shown, green areas are more suitable and red areas are less suitable.



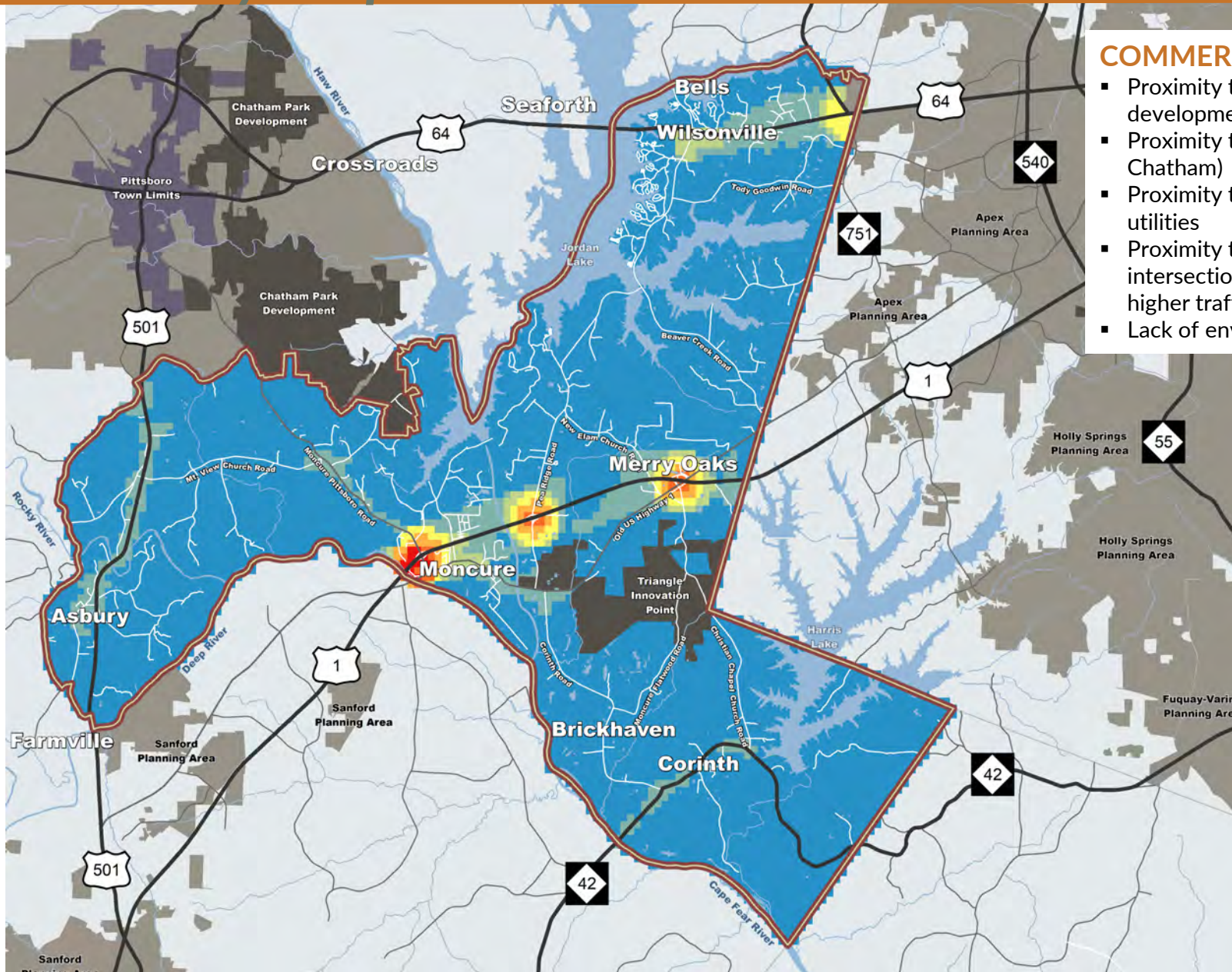
Suitability Map - Residential

RESIDENTIAL FACTORS

- Proximity to existing schools
- Proximity to existing residential development over a certain density
- Proximity to identified nodes (Plan Chatham)
- Proximity to water and sewer utilities
- Proximity to roads
- Lack of environmental constraints



Suitability Map - Commercial



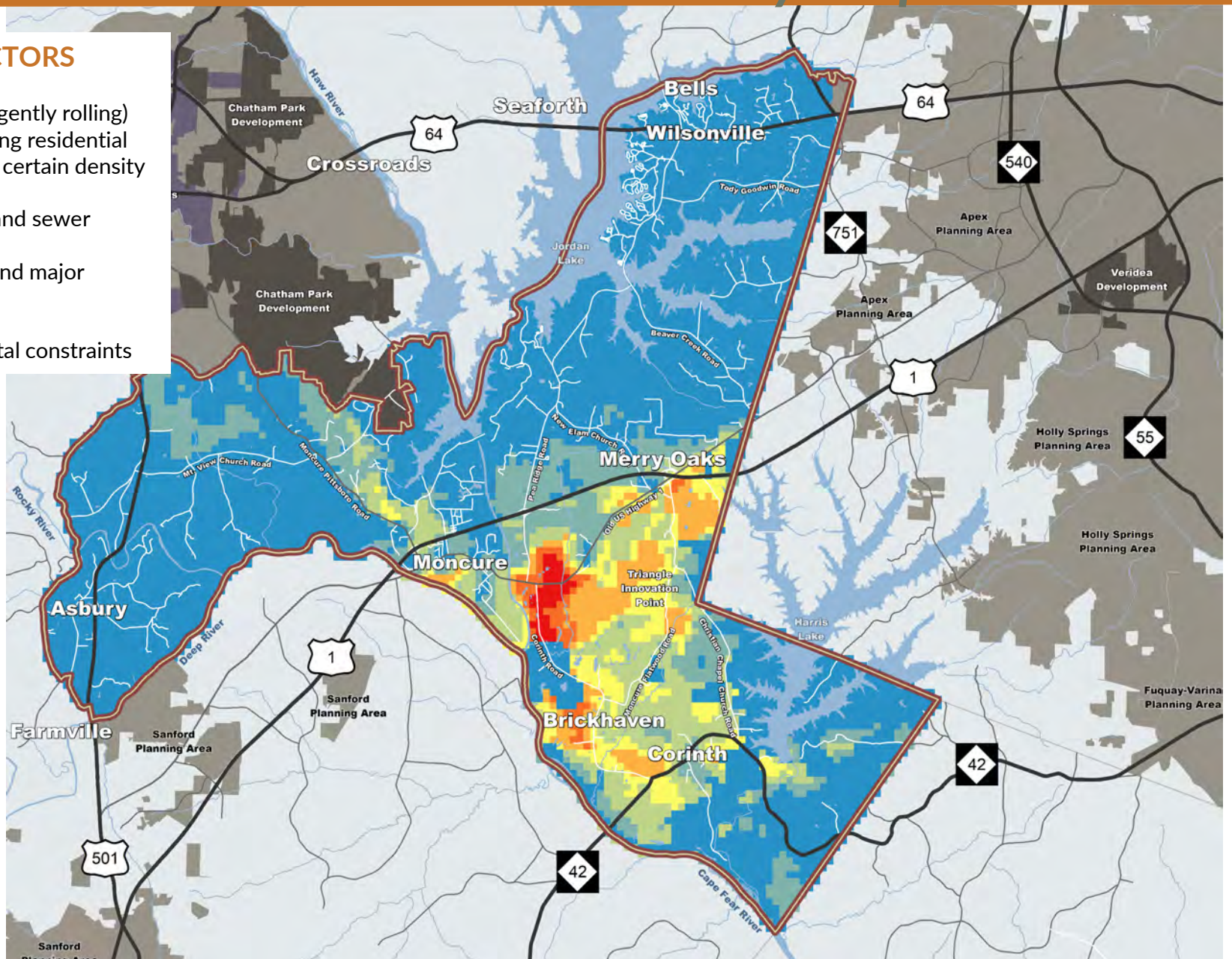
COMMERCIAL FACTORS

- Proximity to existing residential development over a certain density
- Proximity to identified nodes (Plan Chatham)
- Proximity to water and sewer utilities
- Proximity to roads and major intersections, especially those with higher traffic volumes
- Lack of environmental constraints

Suitability Map - Industrial

INDUSTRIAL FACTORS

- Parcel size (larger)
- Topography (flat to gently rolling)
- Distance from existing residential development over a certain density
- Proximity to power
- Proximity to water and sewer utilities
- Proximity to roads and major intersections
- Proximity to rail
- Lack of environmental constraints



Development Trends / Market

Trends

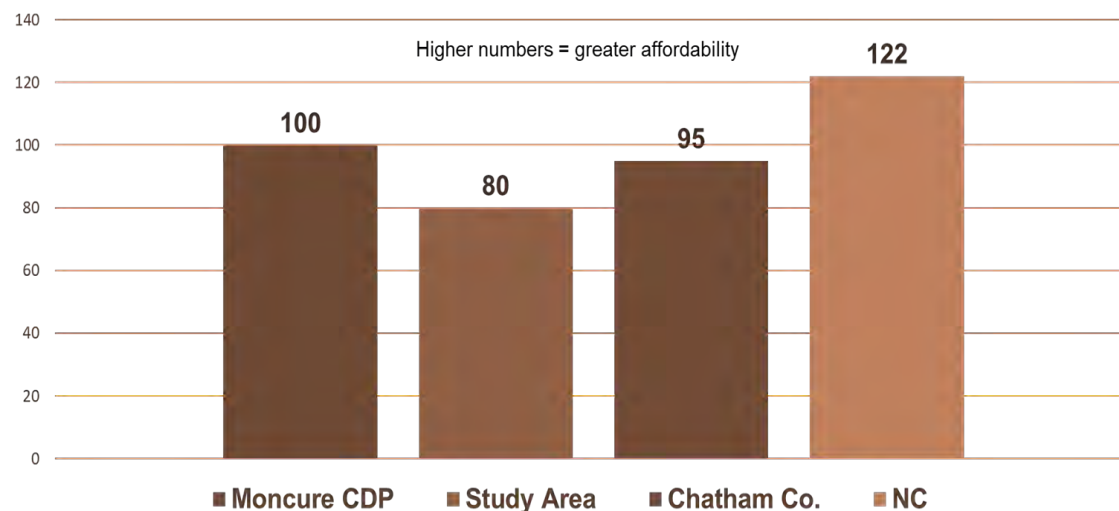
For 2023, the Triangle region is ranked among the nation's top 10 markets for real estate investment and development. The Moncure area is largely rural, but strategically located along the US-1 corridor convenient to Raleigh, RDU Airport, RTP, etc.

HOUSING

US housing affordability has been impacted by supply not meeting the demand since the Financial Crisis of 2007-09. Rising interest rates and apartment rents have also reduced affordability.

Built on a large lot with well and septic, the typical new home in the study area is expensive. The median home value in Moncure (\$300,000) is higher than for the Triangle and North Carolina but well below the values for the study area and Chatham County. Newer developments, such as Chatham Park, are now offering a wider range of housing choices.

A moderate share (11%-12%) of housing units in Moncure and the study area are vacant. A high percentage of housing units (80%) in Moncure are mobile homes. Moncure, the study area, and the county have significantly lower shares of rental units than the Triangle or North Carolina, and 82% of all homes are owner occupied..



Source: ESRI Business Analyst, accessed Dec 2022 – Feb 2023

Note: The Housing Affordability Index measures the ability of a household with the median area income to afford a median value home. Higher numbers mean greater affordability.

Figure 10. Housing Affordability Index

The median home value in Moncure (\$300,000) is higher than for the Triangle and North Carolina but well below the values for the study area and Chatham County.



RETAIL

Online retail purchases, which made up less than 10% of all US sales in 2018, briefly surged to 20% during the pandemic. E-commerce is likely to account for 15% of retail sales in 2023. Still, physical retail stores haven't declined as much as predicted. Due to small amounts of new retail construction, US retail vacancy is low. Developers of retail space in the US will likely remain cautious.

The Triangle region has one of the nation's lowest vacancy rates and should continue to attract retail uses.

New retail stores that serve local needs (grocery stores, drug stores, restaurants) require concentrations of residents nearby. For this reason, mixed-use neighborhoods are popular locations for investments in new retail development.

EMPLOYMENT SITUATION

Job growth in the US has roared back since COVID-related shutdowns. The U.S unemployment hit a 50-year low of 3.4% in early 2023.

Future job growth in the Triangle and Triad are projected to be led by high-tech and professional "knowledge" jobs. However, the regions have recently seen several major manufacturing announcements along the "Carolina Core," including VinFast, Wolfspeed, Toyota, and Boom Supersonic. These manufacturers could create more than 18,000 jobs in 10 years.

Chatham County is expected to grow employment faster than the Triangle or Triad (>16% through 2040).

The Triangle has one of the nation's lowest vacancy rates in retail space:

3%



Projections

The projections that follow attempt to incorporate existing population and development trends as well as the major job creation announcement from VinFast.

HOUSING DEMAND

As part of the growing Triangle region, Chatham County is estimated to need 685 new housing units per year based on population trends. The sparsely-populated study area is projected to see only modest demand, or approximately 34 new units per year. However, VinFast job creation numbers could dramatically change that, even if a small percentage of workers live in Chatham. Over the first seven years of hiring, VinFast could create demand for another 428 housing units per year in southeastern Chatham. Pittsboro, particularly Chatham Park, could accommodate some of that. A wider range of housing types than currently exists would be needed to fit the budgets of mid-wage earners.

Table 2. Potential Housing Demand by Type, Southeastern Chatham County

Type	% of Total Demand	Annual Demand (# of units)
Single-Family Detached	50%	173
Townhomes	20-25%	69 to 87
Apartments	25-30%	87 to 104



Several housing types that are not common or not present in the study area today can be supported by the market in the upcoming decades. They are single-family detached homes (including some on smaller lots), townhomes, and apartments.

RETAIL DEMAND

Physical retail spaces in the US weathered the storm of rising online shopping, but future construction will likely be cautious.

Since retail “follows the rooftops,” meaning it goes to where homes and residents are already locating, little new retail would be expected in the mostly rural Moncure area. The addition of more small, stand-alone stores (i.e., a gas/convenience mart) is likely. However, new housing developed as part of larger residential communities could generate demand for a greater amount of new retail space.

OFFICE DEMAND

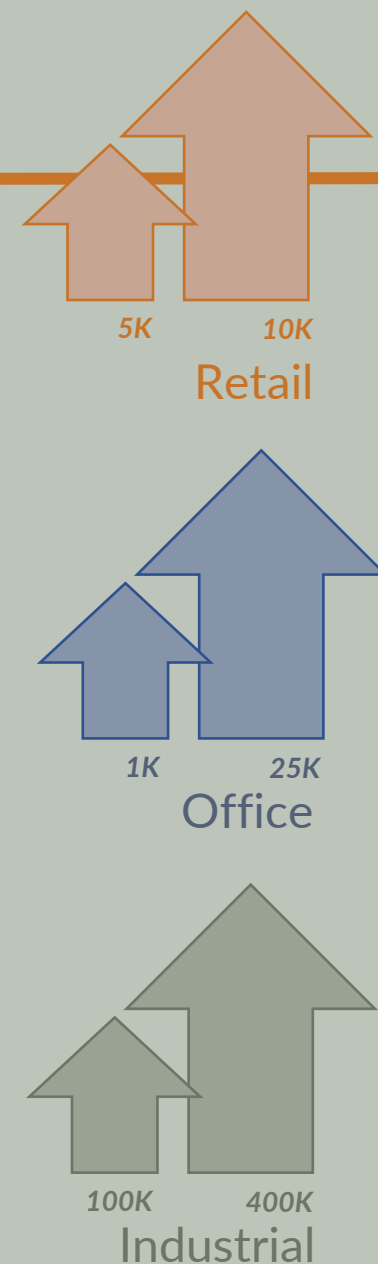
A slow return to the office due to the surge in remote working and hybrid work arrangements has led to record-high office vacancy in the US. New construction is slowing and will likely be limited to the more proven locations in the region.

Industrial projects, like VinFast, could spur a small amount of office demand. If new mixed-use neighborhoods are developed nearby, more office uses could locate there.

INDUSTRIAL DEMAND

America’s industrial and warehouse markets have been booming for years, with record levels of demand and new construction. The pace of development is expected to slow significantly throughout 2023 due to concerns about a weakening economy and the rising cost of borrowing money.

Nearby industrial markets in southern Wake County & Lee County are small, and past trends would not suggest a great deal of demand in southeastern Chatham. However, the new facilities for FedEx and VinFast as well as successful leasing of large new buildings in Sanford indicate that the US-1 corridor is gaining ground as a recognized location for manufacturing and distribution.



*Ranges of Annual New
Demand, Southeastern
Chatham County
(Square Feet)*

Peer Communities

Four small communities in the Southeastern US where an auto plant opened between 1988 and 2011 were studied. The communities are located in Georgia, Kentucky, and Mississippi. The impacts on each community varied, but similar experiences included:

FINDINGS

- In all cases, the projected levels of auto manufacturing jobs and investment were met, and there have been no plant closures or large layoffs.
- Local government revenues grew, though were muted due to incentive agreements.
- For the most part, anticipated spin-off development (housing, retail, restaurants, etc.) did not happen in the community, at least not in initial years after the plant opening.
- Local leaders in those communities suggest a strong focus on infrastructure needs and capital improvements planning.



Georgetown, Kentucky

Toyota began operations there in 1988, when the city had a population of 11,000. Demand for industrial space by Toyota, its suppliers, and other industries has been strong over the years. The biggest surprise was that almost everyone locally expected an “immediate boom” that “didn’t happen.” Retail growth in particular has been limited. Georgetown has grown to a population of 37,000 over 35 years, but most new residents commute out of town to jobs elsewhere, including nearby Lexington, KY.



Canton, Mississippi

Nissan was Mississippi's first auto plant when it opened there in 2003. Canton's population has declined over 20 years, from 13,000 to 11,000. Meanwhile the surrounding (more affluent) county has grown by 45 percent. New residential and retail development in the county has occurred away from Canton, closer to the state capital of Jackson. Increased tax revenues have helped the county build several new schools.



West Point, Georgia

Home to a Kia plant since 2009, West Point (and the adjacent counties) has seen little population growth since the plant opened. Over 10 years, unemployment dropped from 15% to 3%. There was great interest in residential and other development when the plant was under construction, but the Great Recession came and "nothing happened."



Blue Springs, Mississippi

This village had 230 residents when Toyota opened in 2011. It now has 440 people. The county population has increased from 27,000 to 28,000 since 2011. Most development has gone to the larger nearby city of Tupelo. Toyota built an endowment for schools in three counties, now worth about \$60 million.

Infrastructure

Utilities

Chatham County provides potable water service to approximately half of the unincorporated portion of the County. The County does not provide wastewater services with the exception of a small package plant in Bynum. The following describes the services provided by others.

PUBLIC WATER

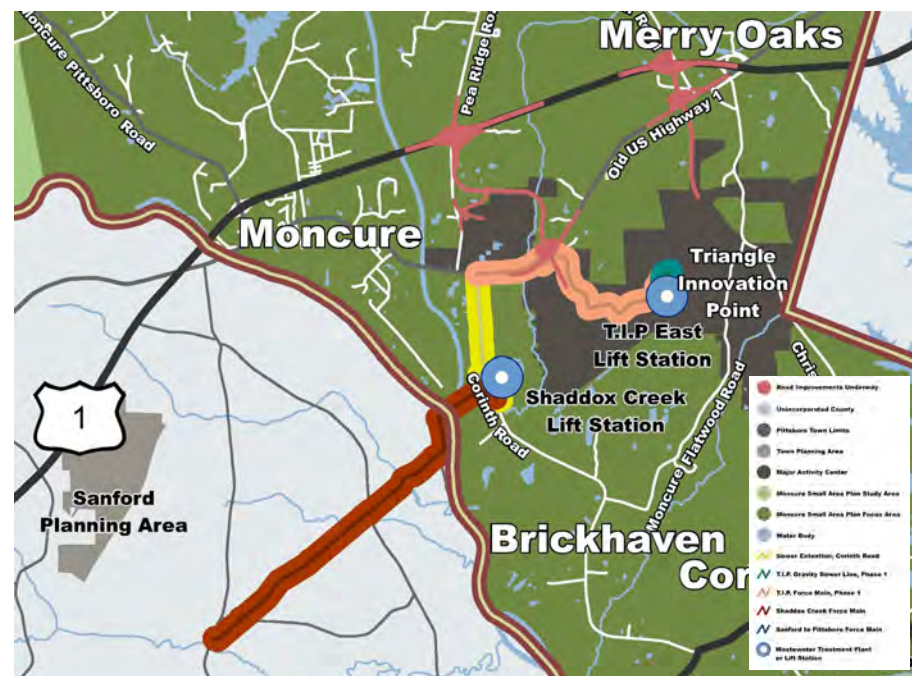
Presently, Chatham County provides potable water service to the entire Study Area. The area east of the Haw River up to US 64 is in the “North Chatham” system and is served via the Beaver Creek Water Treatment Plant. The study area west of the Haw River is in the “Asbury” system and is served via an interconnection with the City of Sanford’s water system. The capacity in these systems and their existing demands are as indicated in Table 3.

In addition to public systems, water service can be provided via private companies, such as Aqua or Old North State.

PUBLIC & PRIVATE SEWER

Wastewater treatment in the study area, with the exception of industry, is provided via septic systems permitted by Chatham County or wastewater irrigation systems permitted by NC Department of Environmental Quality. Public sewer is potentially available from the City of Sanford and/or the Town of Cary.

In addition to public systems, sewer service can be provided via Private companies, such as Aqua or Old North State.

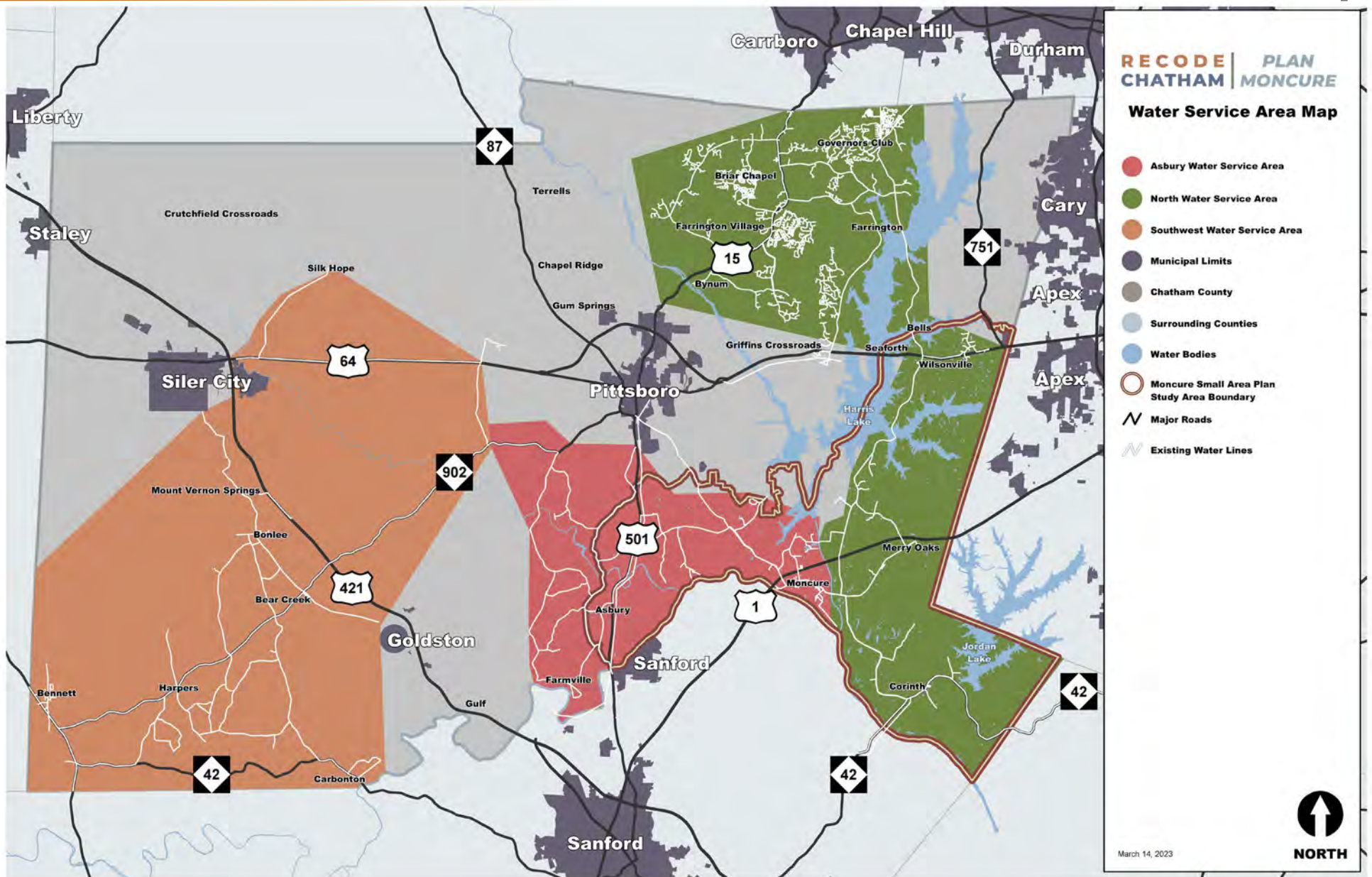


Wastewater service for Triangle Innovation Point will be provided by the City of Sanford.

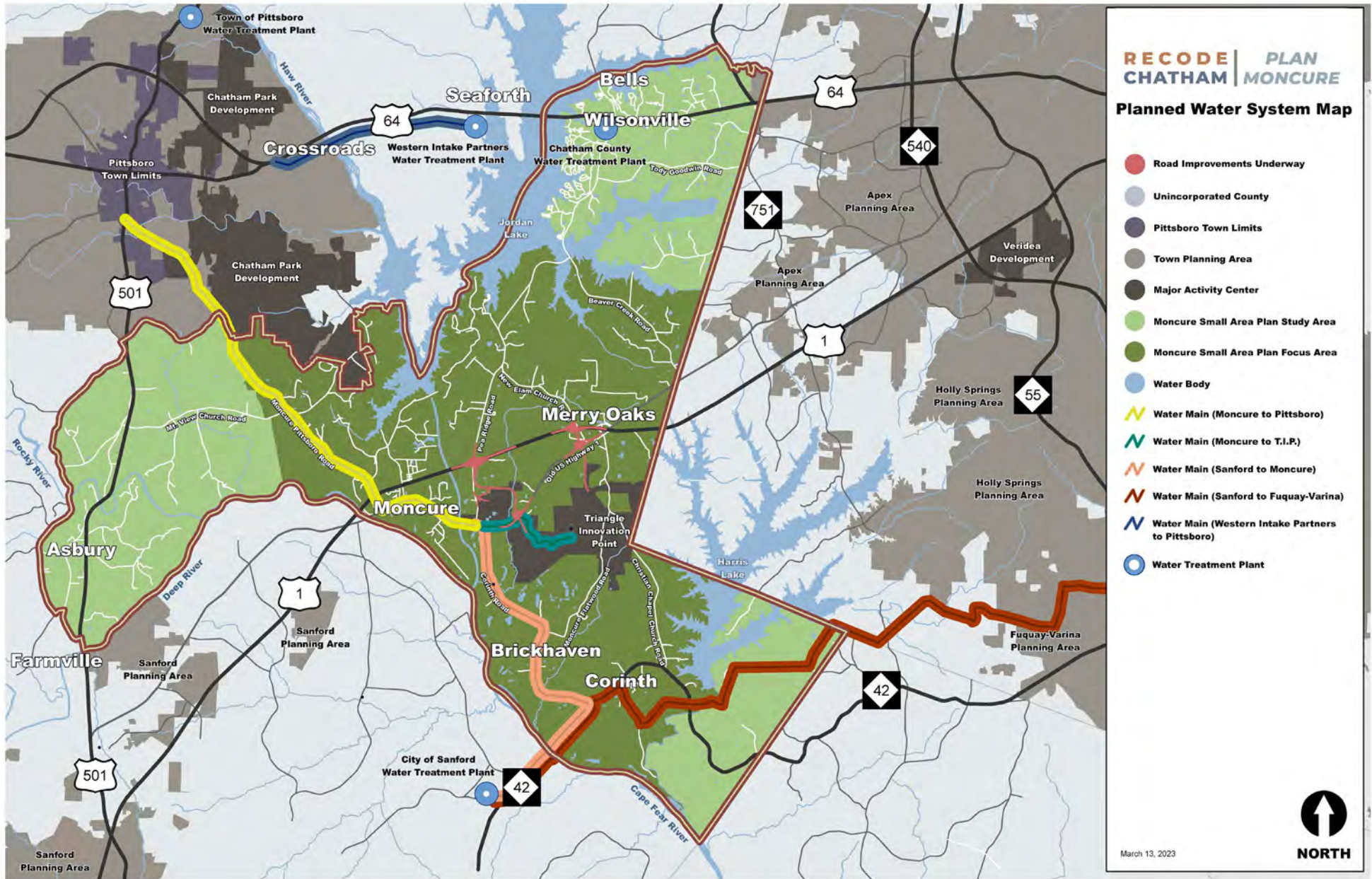
Table 3. Public Water System Capacity and Demand

System	Capacity (MGD)	Current Avg. Day Demand (MGD)	Study Area Avg. Day Demand (MGD)
North Chatham	3	2.3	0.17
Asbury	0.5	0.12	0.08

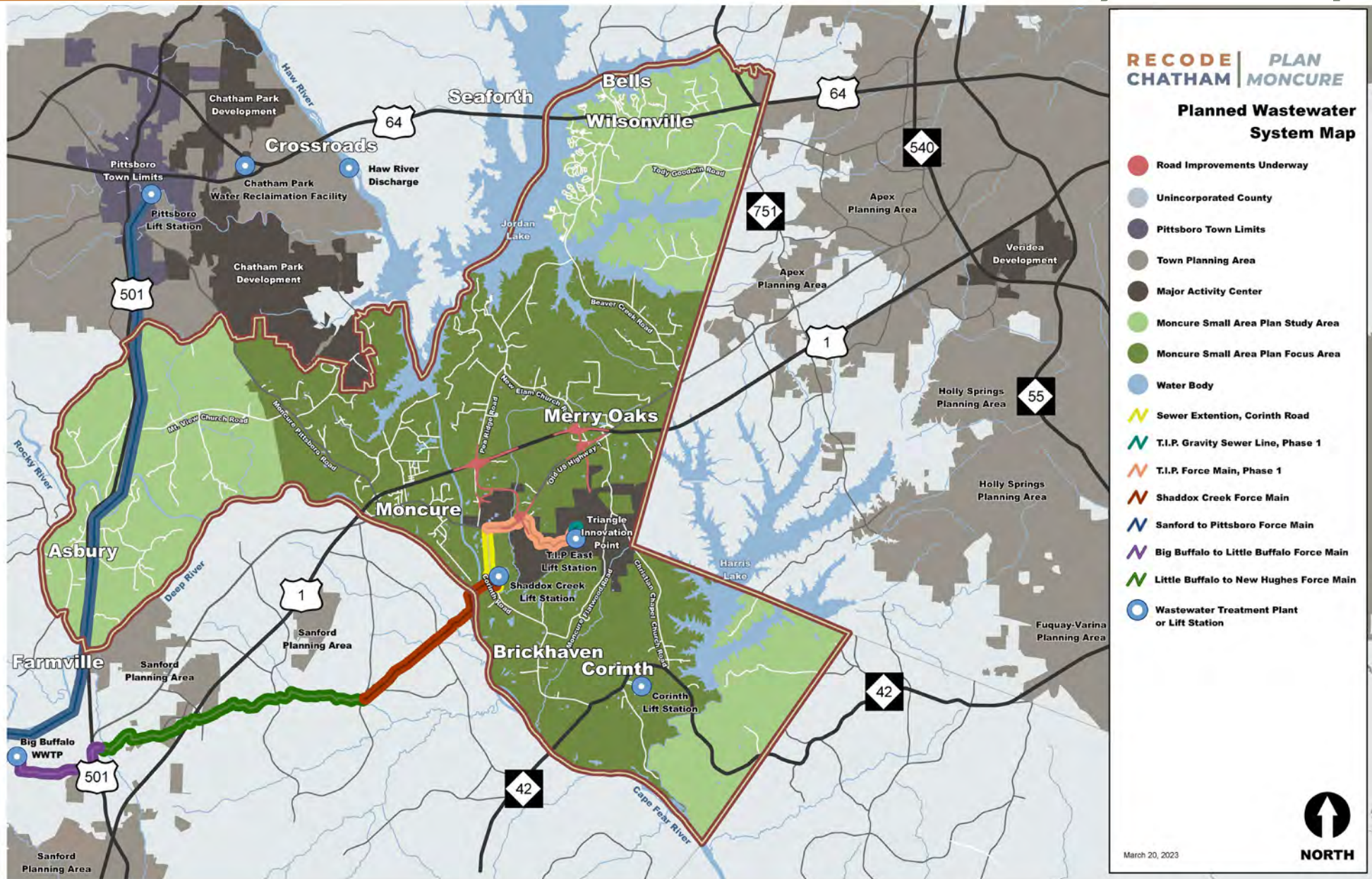
Water Service Area Map



Planned Water System Map



Planned Wastewater System Map



Transportation

EXISTING NETWORK

▪ Roads

The road network in the Plan Moncure study area is centered on US-1, which runs east-west and connects the community to the Triangle and other major state corridors. US-1 is also an important freight corridor in the region and serves as a designated truck route. US-64 is the only other freeway in the study area and also runs east-west. Major collectors include Corinth Road, Pea Ridge Road, and New Elam Church, which all provide north-south connectivity.

Hydrology, the railroad, and poor historic road connectivity have created a fragmented road network in the study area. As new industrial development brings increased traffic through the area on US-1, improvements may be needed on secondary routes to maintain conditions for local traffic.

▪ Rail

A Class I CSX rail line runs east-west through the study area. There is currently little rail traffic, with an average of four trains a day, though freight traffic is expected to increase once VinFast begins production. This section of rail is also part of Amtrak's Silver Star passenger line, though the train does not stop in Chatham County.

▪ Air

The Raleigh Executive Jetport, just outside the study area in Sanford, serves corporate and general aviation aircraft. It has a 6,500-foot primary runway and serves 170 operations (take-offs and landings) per day. The airport has a new terminal and seven undeveloped corporate hangar sites.

▪ Bicycle and Pedestrian Facilities and Greenways

Currently, there are no existing off-road bicycle or pedestrian facilities, though Old US-1 through the study area is designated as a section of US Bike Route 1. Also, the Chatham Bicycle Plan (2011) identifies construction of a shared use path along the abandoned rail alignment east of Moncure-Pittsboro Road as a long-term improvement.

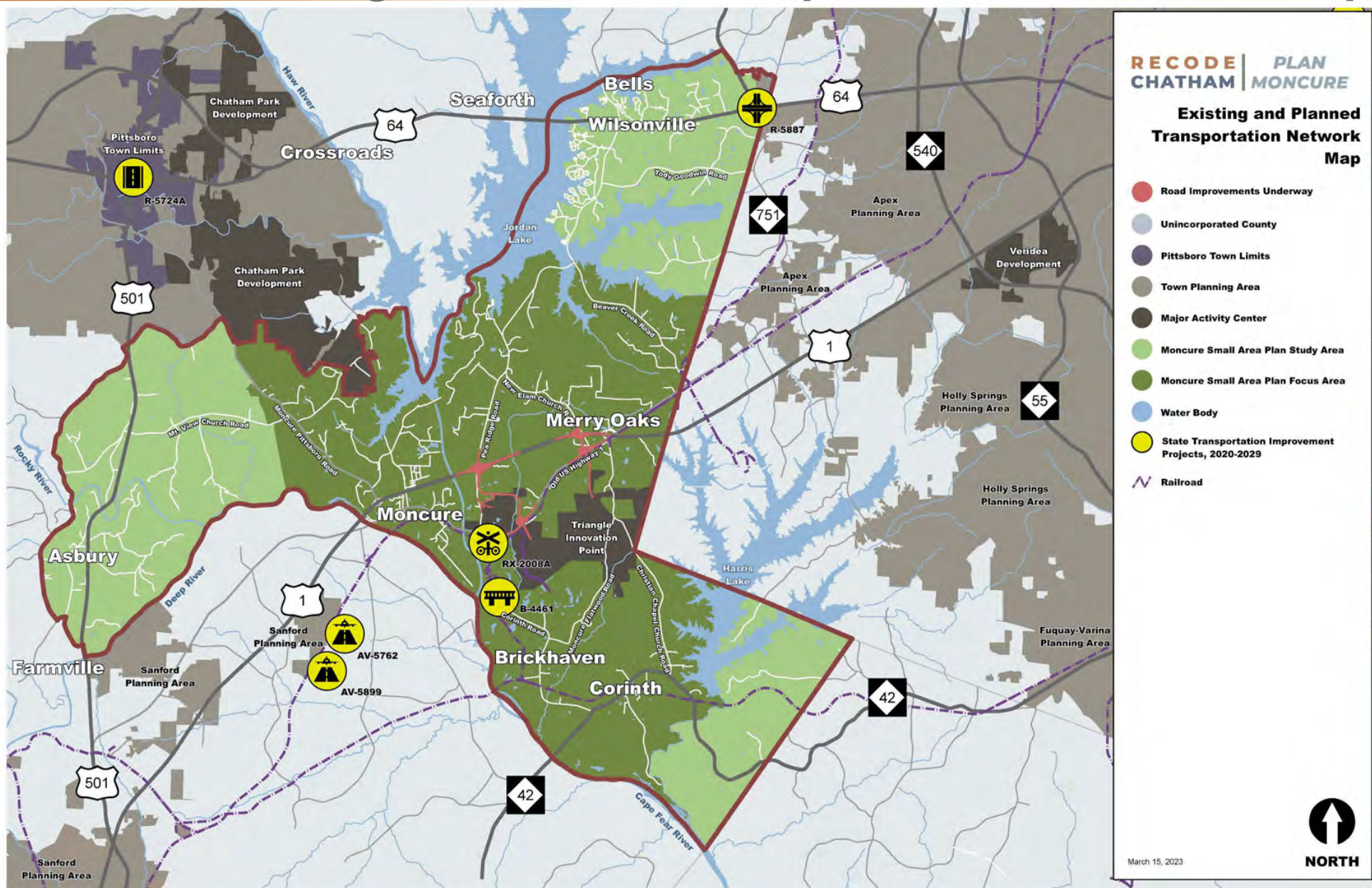
State Transportation Improvement Program

The State Transportation Improvement Program (STIP) is a 10-year state and federally-mandated plan that identifies the funding for and scheduling of transportation projects throughout the state. A combination of roadway, bridge, and rail projects within the study area are included for funding in the 2020-2029 STIP. NCDOT conducts its prioritization process to update the STIP every two years.

NCDOT STIP Projects to serve VinFast Site:

- 1** HE-0006- Triangle Innovation Point site improvements. Construction begins 2023.
- 2** RX-2008A- Install active warning devices at the CSX railroad crossing on Corinth Road near Haywood. Construction in 2023.
- 3** B-4461- Replace Corinth Road bridge at Shadow Creek. Under Construction
- 4** R-5887- Convert US-64/NC-751 intersection to interchange. Construction post 2029.

Existing & Planned Transportation Network Map



TRAFFIC VOLUMES

The disconnected nature of the road network in the study area places most vehicle traffic on US-1, which carries up to 31,500 vehicles per day. Other major corridors on the periphery, such as US-64 in the north and US-15 in the west carry between 7,500 and 25,000 vehicles per day. However, the majority of secondary routes in the area carry less than 5,000 vehicles per day.

SAFETY

In looking at existing safety conditions, two primary types of data were considered— NCDOT safety section scores and total crash frequency by intersection. The safety map shows sections of road with high crash density and risk in red.

High frequency crash intersections include:

- US-64 and NC 751
- US-64 and SR 1008 (Beaver Creek Rd)
- US-1 and SR 1012 (Moncure Pittsboro Road)
- US-1 and Old US-1

These intersections and sections of US-1, Old US-1, Moncure-Pittsboro Road, Pea Ridge Road, and Corinth Road with high safety section scores will be reviewed for potential safety improvements.

NEAR TERM ISSUES

Roads and intersections expected to experience significant traffic growth are shown on the near-term issues map. This map excludes US-1 and NCDOT access projects, which are expected to be addressed by the HE-006 improvements.

The corridors and intersections identified on the map will require additional study to determine the appropriate road cross-sections and intersection treatments.

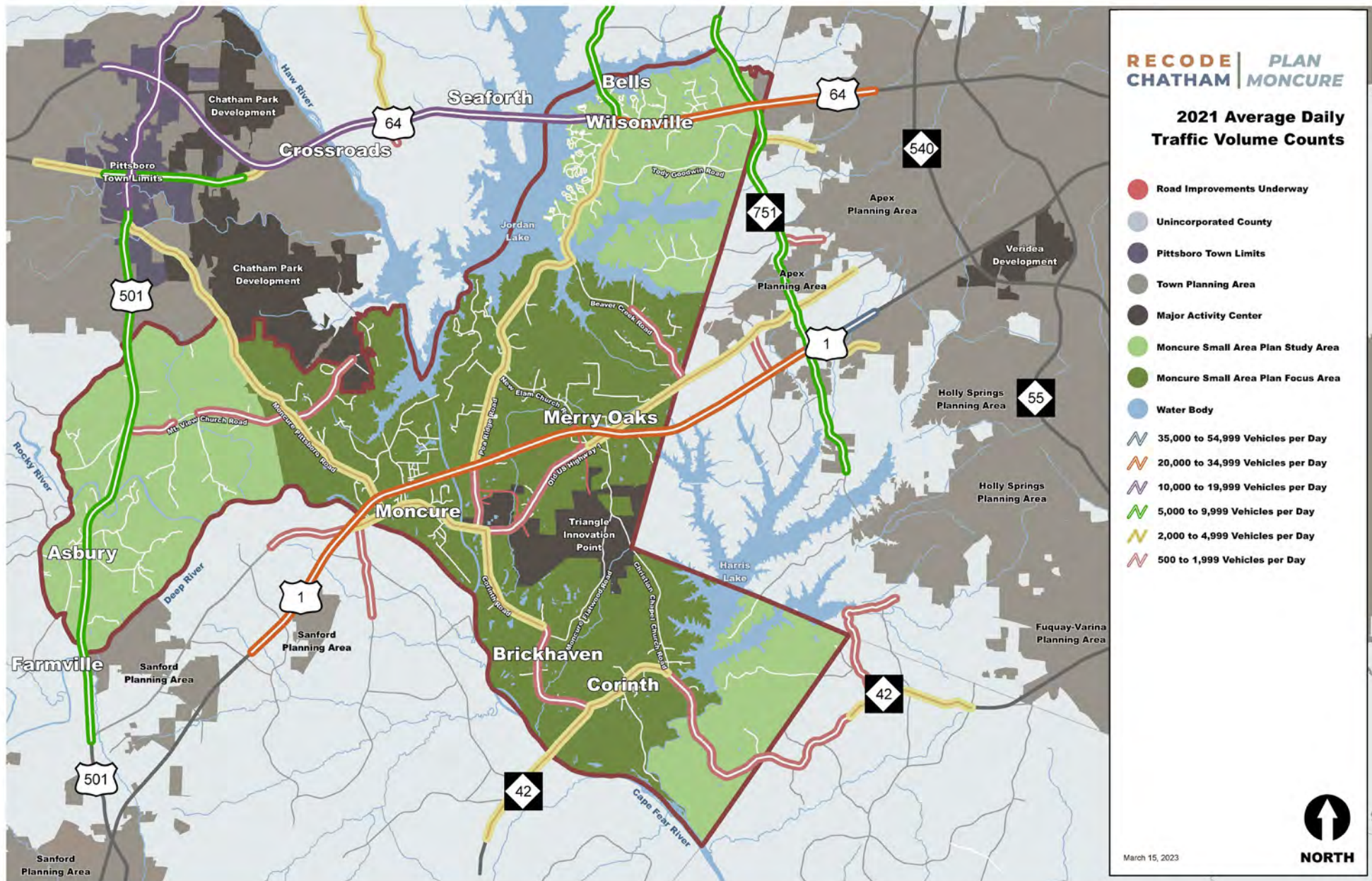
PLANNED NETWORK IMPROVEMENTS

New developments, including a VinFast plant and FedEx Distribution Center, could cause rapid growth in the study area, though the timing of the growth is uncertain.

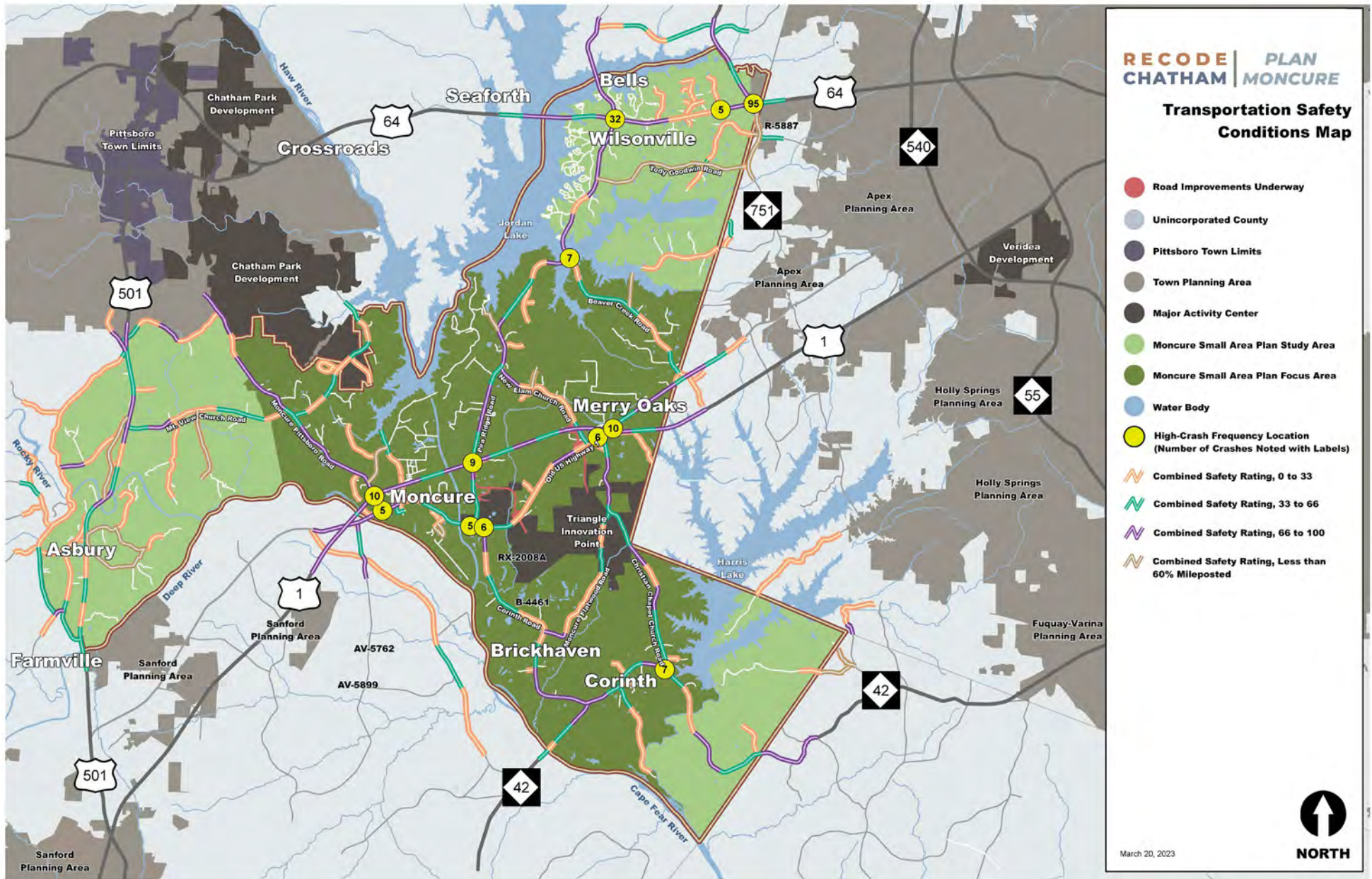
Based on NCDOT's growth projections, Project HE-0006 Phase 1 is anticipated to address vehicle capacity needs on US-1 due to development through 2050. Phase 1 focuses on improving the interchanges at US-1 at Elam Church Road and Old US-1 at Elam Church Road and Pea Ridge Road, to facilitate freight movement as well as local and regional traffic. Phases 2a and 2b will focus on improving Pea Ridge Road at US-1 and Old US-1. Phase 2 construction will be dependent on growth and corresponding increases in traffic volumes.

This plan and other long-range planning efforts will identify improvements needed to address potential secondary impacts of development on local roads.

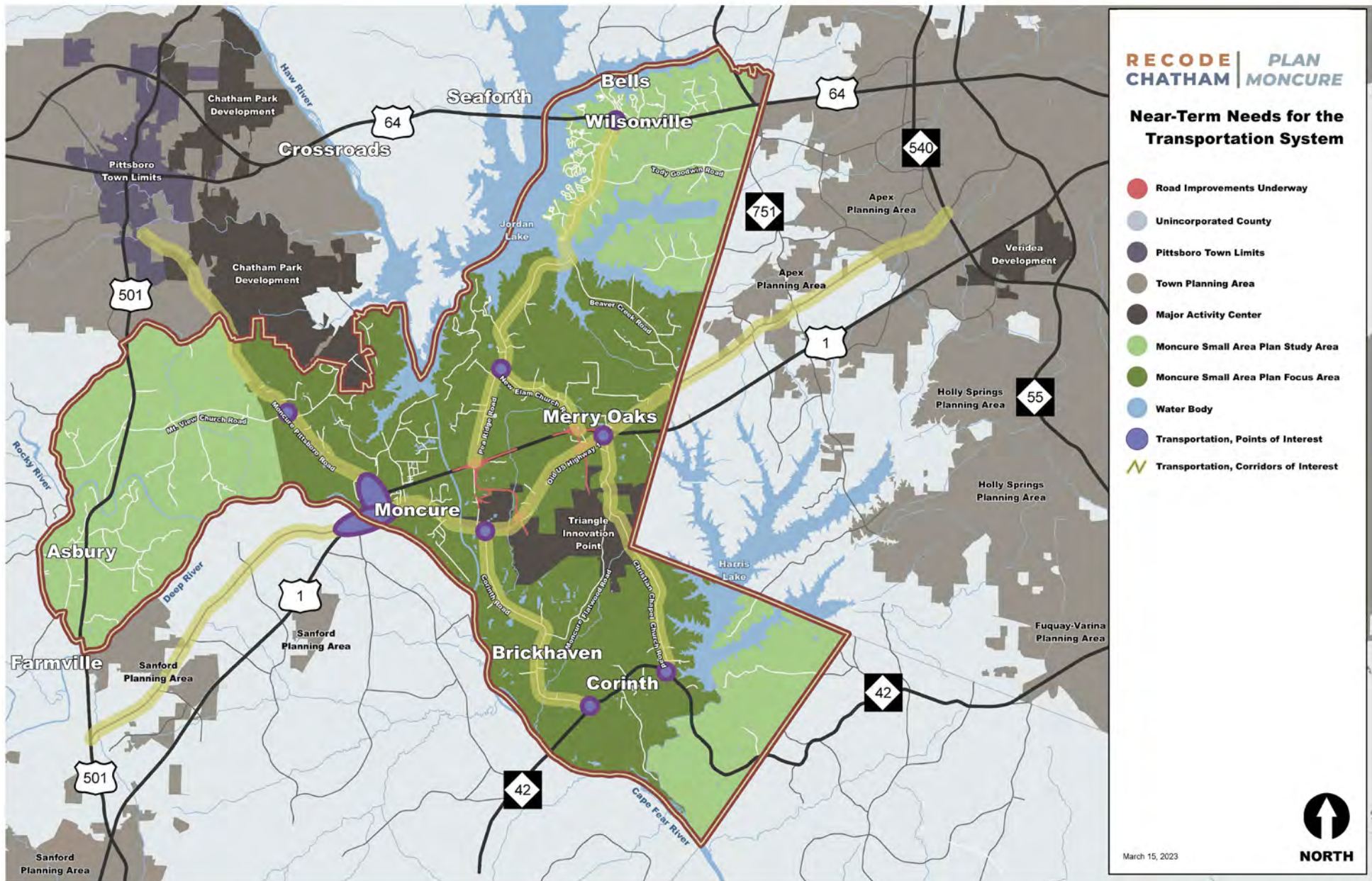
Traffic Volumes Map



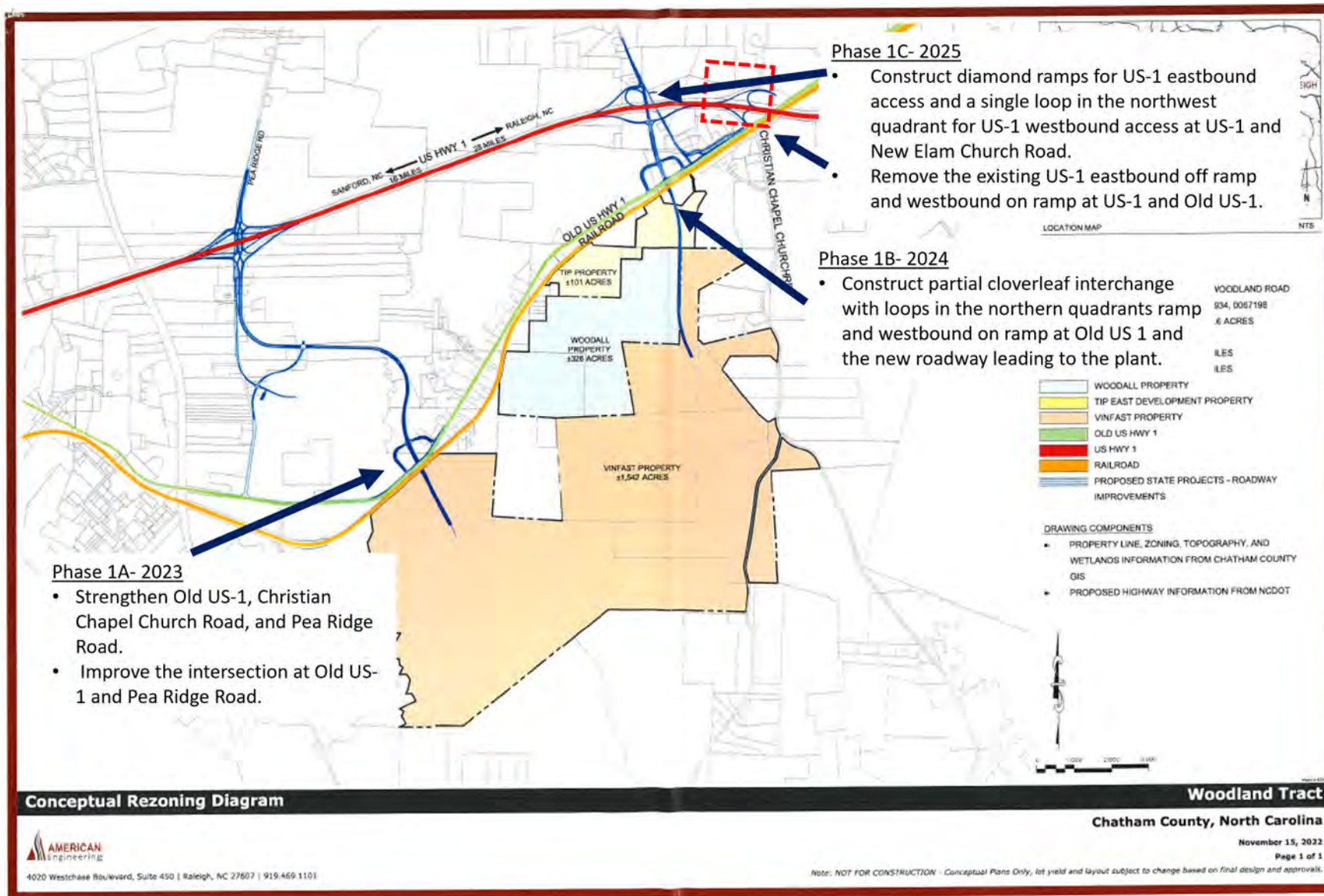
Safety Map



Near-Term Network Issues Map

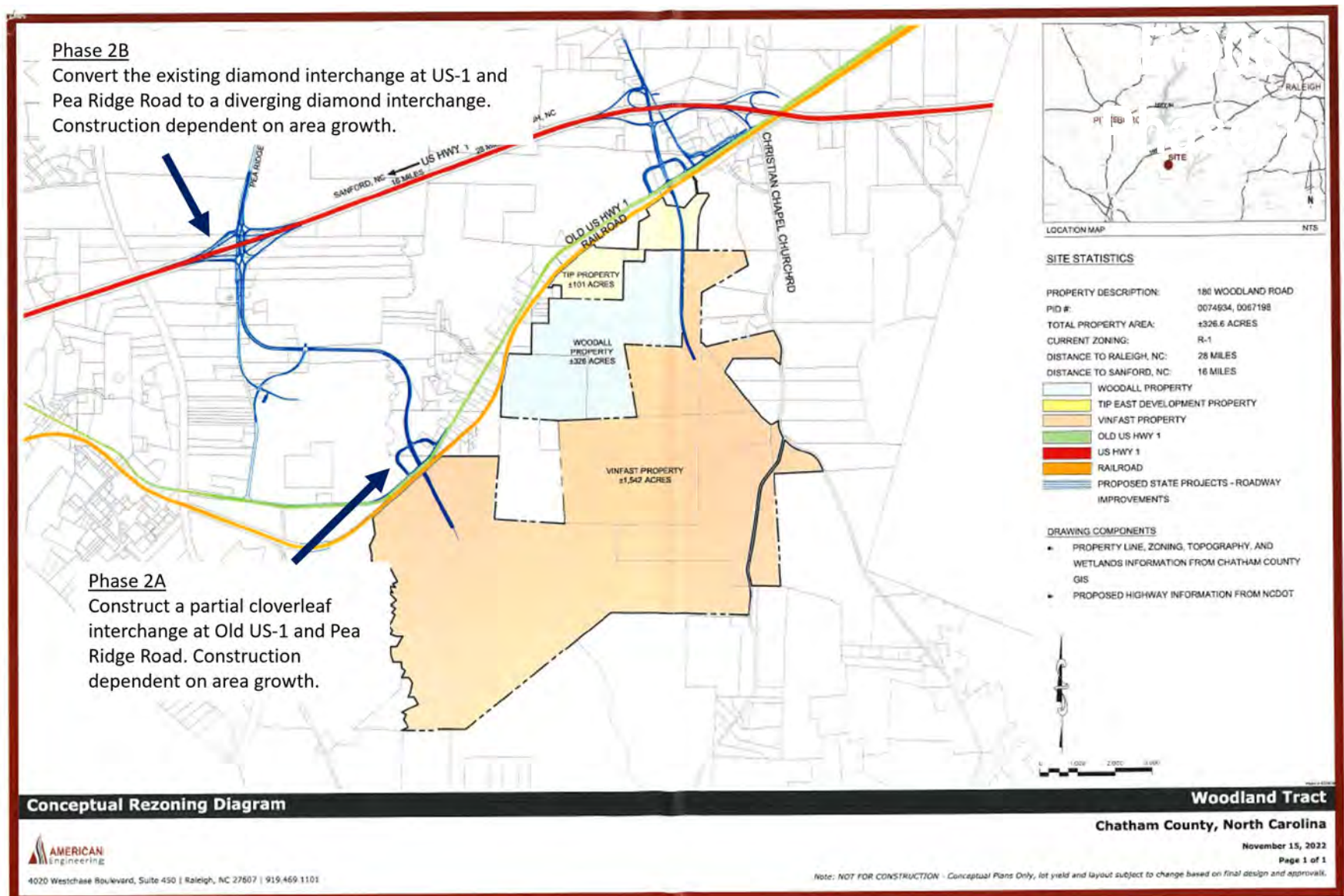


HE-0006 – Triangle Innovation Point Phase 1



Sources:
NCDOT, VHB

HE-0006 – Triangle Innovation Point Phase 2



Sources:
NCDOT, VHB

AMERICAN
Engineering
4020 Westchase Boulevard, Suite 450 | Raleigh, NC 27607 | 919.469.1101

Moncure Small Area Plan Market Assessment

July 14, 2023

RECODE | **PLAN**
CHATHAM | **MONCURE**

Chatham County Moncure Small Area Plan Economic Leadership Tasks

Introduction to the Market Assessment

The purpose of the market assessment tasks is to provide a baseline of data to support the process of creating a small area plan. This data gives a snapshot of conditions in the Moncure area and the larger study area – population, demographics, income, employment, and housing conditions. We also study historical trends to suggest how population and employment might grow through the year 2040. Significant new employers in southeastern Chatham County, such as VinFast, could alter the existing population and employment trends.

This assessment also includes a review of four small communities in the southeastern United States that host an automotive plant, with the large job creation and facility investment that comes with such a plant. The goal of this task is to learn from their experiences in terms of population growth, residential and non-residential development, and the fiscal impacts on communities. Leaders in these communities provided valuable lessons and advice that can help Moncure and Chatham County in this process.

Finally, we use historical trends, employment plans from VinFast, and market data for the Research Triangle region to provide a range of projections for the housing and non-residential space demand that could be felt in Moncure and the larger study area through 2040. These projections are merely best estimates, and estimating future demand in this area is no more certain than projecting what will happen to interest rates or the stock market years from now. The projections are also not recommendations, but are meant to indicate the type and scale of new development that the market could support, if Moncure and Chatham County wish to accommodate it in southeastern Chatham.

Part 1: Demographics, Employment and Housing

For this section, we reviewed the demographics of two different geographies in southeastern Chatham County: the immediate Moncure-Haywood area between the Deep and Haw rivers, and the larger study area used for this small area plan.

Moncure and Haywood are unincorporated communities. To gather demographic information, the U.S. Census Bureau established a Moncure census-designated place (CDP) that includes those two communities and has a total area of 4.9 square miles. The much larger study area covers a total of slightly more than 100 square miles.

Moncure Census-Designated Place (CDP)



Population:

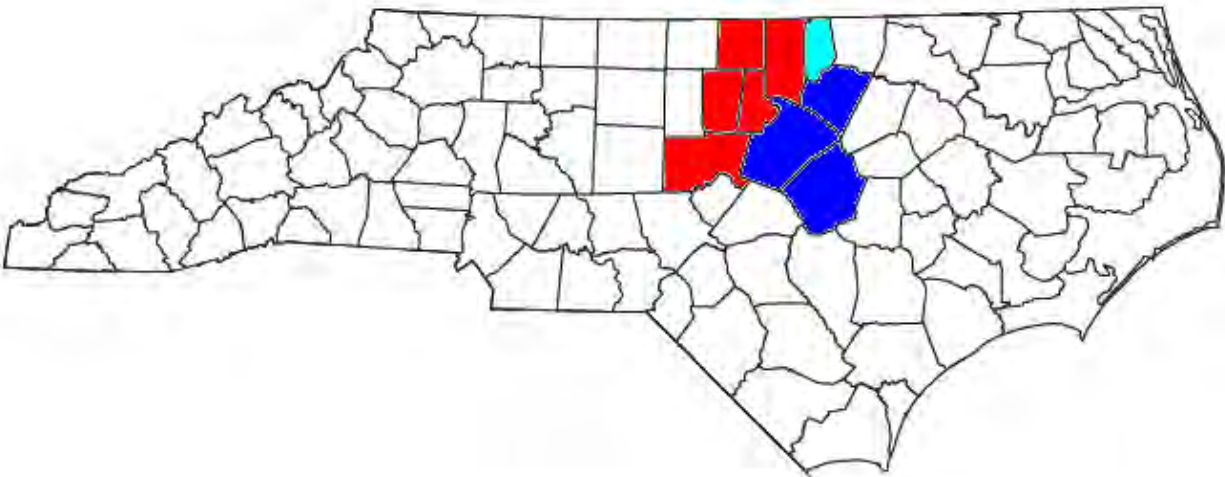
The Moncure CDP had a 2010 census population of 711, and a 2020 census population of 780. Global data provider ESRI estimates the 2022 population as 776. Given the very small numbers associated with this small census-designated place, caution should be taken in interpreting population changes over this period as a trend.

The larger study area in southeastern Chatham has grown from 3,680 in 2010 to 3,950 in 2020 and an estimated 4,030 in 2022. From 2010 to 2020, the study area's population increased by 7.3 percent.

Chatham County's 2020 census population was 76,285. A 2022 county estimate from ESRI is approximately 79,500. From 2010 to 2020, Chatham experienced population growth of 20.1 percent, and over a 20-year period it increased its population by 54.6 percent. The Moncure CDP represents about 1 percent of the total Chatham County population, while the larger study area contains about 5 percent of the county's population.

The Research Triangle region metropolitan area can be measured using the Census Bureau's Raleigh-Durham-Cary combined statistical area (CSA).

Raleigh-Durham-Cary Combined Statistical Area



The most recent population estimate for the Raleigh-Durham-Cary CSA is 2,144,600 from the Census Bureau's 2021 American Community Survey. Between the 2010 and 2020 census reports, the Triangle grew by 17.5 percent. The region's growth between 2000 and 2020 was very similar to Chatham County's, with the regional population increasing by 55.4 percent.

Using the most recent figures, Chatham County currently contains about 3.7 percent of the Triangle region's total population.

Essential Demographics:

According to 2022 estimates from ESRI, the median age of the Moncure CDP population is 45.5. This is well above the North Carolina median age of 39.2, but lower than Chatham County's median of 46.5. The median age of the full study area is the highest, at 46.7 years. More than 30 percent of the Moncure CDP population is between the ages of 55 and 74. About 11 percent of residents are under the age of 10, and a little less than 24 percent are under the age of 20.

The population breakdown by major racial and ethnic groups is shown in the following table. Compared with the county as a whole, the Moncure CDP has a lower percentage of white residents and larger percentages of Black and Hispanic residents. The full study area has a significantly higher white population than Moncure by percentage, and lower shares of Black and Hispanic residents.

Group	Moncure CDP	Study Area	Chatham Co.	NC
White Alone	64.9%	75.9%	71.1%	61.7%
Black Alone	15.5%	11.0%	10.3%	20.5%
Hispanic (any race)	15.1%	8.1%	13.6%	10.9%

Source: ESRI Business Analyst, accessed December 2022

ESRI's Diversity Index measures the likelihood that two people living in the same area will be from different racial or ethnic groups. Higher numbers indicate greater diversity. The Moncure CDP's Diversity Index is 65.6. For comparison, the Chatham County index is 59.5, North Carolina's is 65.1, and the nation as a whole has an index of 71.6. The Diversity Index of the

entire study area is much lower – at 49.3 – than Chatham County, the state, or the Moncure CDP.

The Moncure CDP's average household size of 2.52 people is larger than for the full study area (2.44), the county overall (2.41), and the state (2.44).

Education Attainment:

Among adults ages 25 and over, the Moncure CDP population has lower education attainment. A notably large percentage of residents have some college but no degree. Education attainment within the larger study area is similar to statewide averages. Education levels are detailed in the following table.

	Moncure CDP	Study Area	Chatham Co.	NC
HS graduate, GED, or less	43.7%	35.6%	29.9%	35.8%
Some college, no degree	26.2%	21.5%	14.5%	18.8%
Associate degree	5.0%	13.9%	10.0%	11.3%
Bachelor's degree or higher	25.1%	29.0%	45.6%	34.1%

Source: ESRI Business Analyst, accessed December 2022

Income:

The Moncure CDP 2022 estimated median household income is \$59,180. This is 5.6 percent lower than the median for North Carolina, and 24.9 percent less than the Chatham County median of \$73,910. The community's per capita income (\$42,220) is actually 15 percent above the statewide figure, but 10 percent below the Chatham County per capita income. The full study area, however, has a much higher median household income than the Moncure CDP – \$71,240, which is close to the county-wide median and well above the state's median.

ESRI's Wealth Index uses a number of factors – including income and net worth – in an attempt to capture the standard of living, financial stability, and sustainability of area households. A figure of 100 equals the national average. Using this measure, Moncure has a Wealth Index of 127. Chatham County's index is 136, while the state number is 83. The broader study area's Wealth Index is the highest, at 148.

	Moncure CDP	Study Area	Chatham Co.	NC
2022 Median Household Income	\$59,180	\$71,240	\$73,910	\$62,510
2022 Per Capita Income	\$42,220	\$46,960	\$46,485	\$36,710
Wealth Index	127	148	136	83

Source: ESRI Business Analyst, accessed December 2022

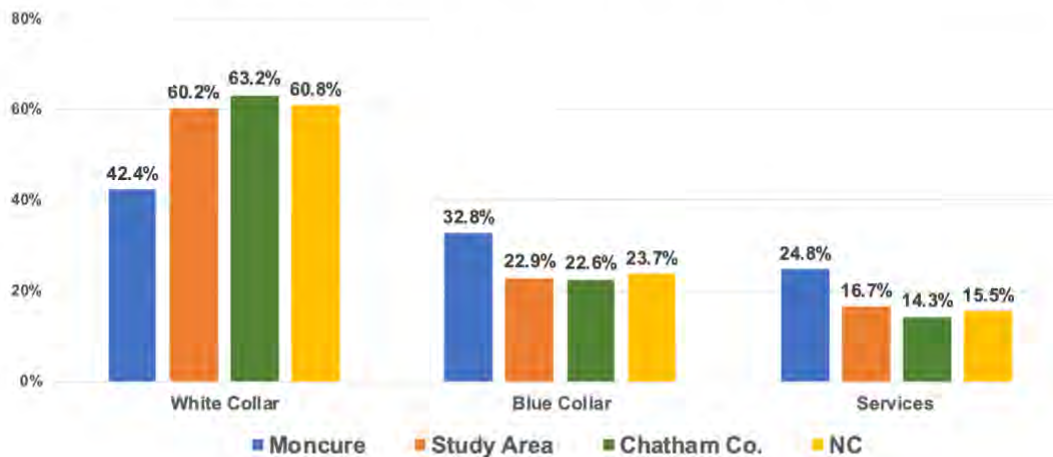
The Census Bureau's American Community Survey (2021) estimates that the Moncure CDP has a very low poverty rate, at 3.5 percent.

Employment:

The Moncure CDP has a very small labor force, with ESRI data showing a civilian population (ages 16 and above) in the labor force of just 374 people. The larger study area also has a small labor force of 1,990 people. The most recent estimated unemployment rates for the two areas residents are extremely low, at just 0.3 percent for Moncure and 1.6 percent for the study area. This compares to 2.2 percent for Chatham County and 3.6 percent statewide during the same period.

The data shows that workers from the Moncure CDP are much more likely to be employed in blue collar jobs (such as construction and transportation) and service occupations, compared with the study area, county, and state. They are less likely to work in white collar jobs such as management, professional, and sales occupations.

Employed Population By Occupation, 2022



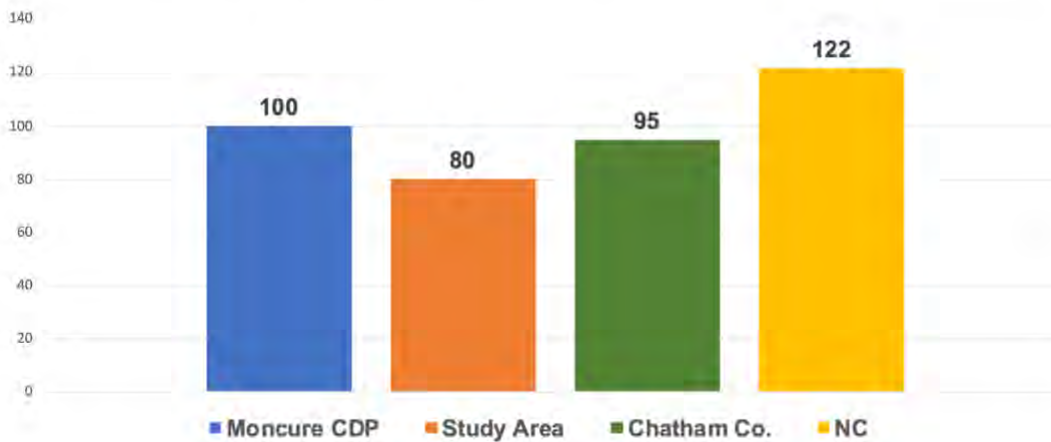
Source: ESRI Business Analyst, accessed December 2022

Looking at employment by industry sector, Moncure CDP residents are much more likely to work in construction. Nearly 20 percent of employed adults are in construction, compared with less than 12 percent of county residents overall. Workers from Moncure are less likely to work in the services sector, at 38 percent versus 51 percent of all Chatham County adults.

Housing:

ESRI's Housing Affordability Index measures the ability of a typical household in the area to purchase an existing home. An index of 100 means that the median household income in the area is exactly sufficient to afford the median home value. Higher scores indicate greater affordability. As estimated for 2022, Moncure has a Housing Affordability Index score of 100. Chatham County's score is 95 and North Carolina's is 122. The wider study area has the lowest affordability score, at 80. Note that these figures are based on the median home value, which is simply the middle of all values in the data set. Those figures could differ significantly from the average value.

2022 Housing Affordability Index



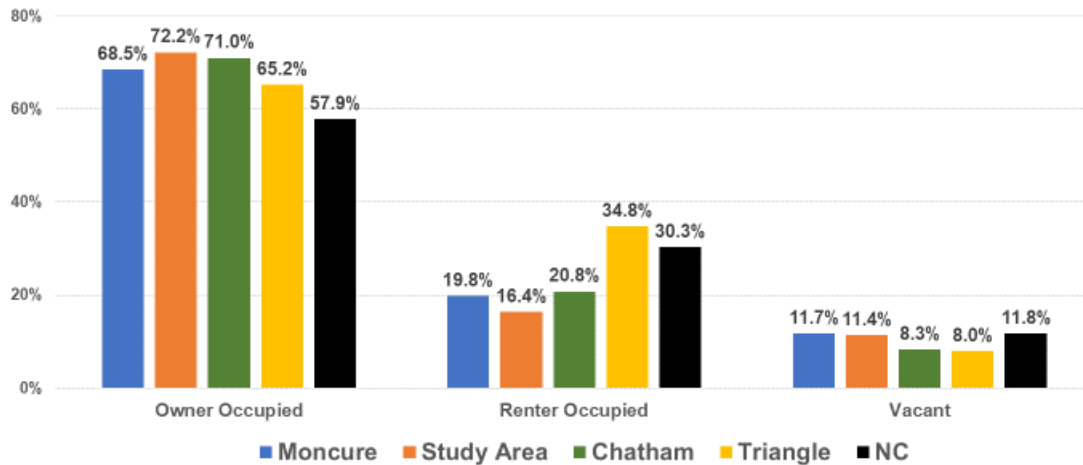
Source: ESRI Business Analyst, accessed Dec 2022 – Feb 2023

According to ESRI data, the Moncure CDP has slightly lower share of all housing units that are owner-occupied, compared with the full study area and the county. However, the Moncure CDP's owner-occupied percentage is actually higher than those for the Triangle and statewide. The Triangle and North Carolina have much higher percentages of housing units that are rented.

Apartment communities are relatively rare in Chatham County. Members of the Triangle Apartment Association (TAA) represent about 1,000 apartment units in Chatham. For comparison, TAA members represent about 10,000 apartment units in Orange County, 34,000 in Durham County, and 108,000 in Wake County.

The immediate Moncure area and the wider study area have moderate shares of units that are vacant, each between 11 and 12 percent.

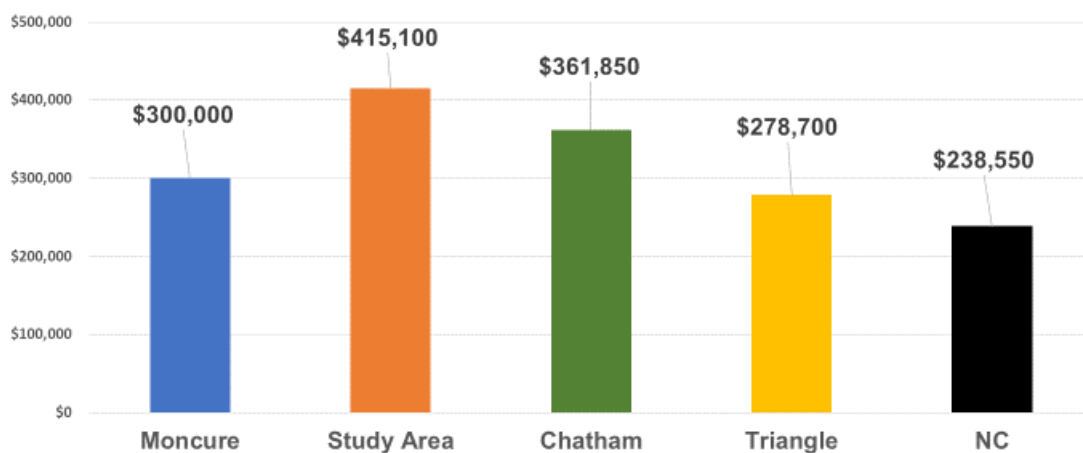
Housing Unit Status, 2022



Source: ESRI Business Analyst, accessed Dec 2022 – Feb 2023; Census Bureau ACS 2021

According to 2022 estimates from ESRI, the median value of a home in the immediate Moncure area is about \$300,000, which is higher than the Triangle-wide and statewide median values, but far less than in the study area and for all of Chatham County. However, these figures do not include the value of mobile homes. Including mobile home values greatly impacts the median value, as discussed below.

Median Home Value, 2022



Source: ESRI Business Analyst, accessed Dec 2022 – Feb 2023

According to information from the Census Bureau's American Community Survey (2021 *five-year averages*), the most striking aspect of the Moncure CDP's small housing stock is that it is dominated by mobile homes. The ACS data indicates that more than 80 percent of housing units there are mobile homes, less than 20 percent are traditional single-family detached, and there are no attached units or apartments. When mobile homes are included along with other types of owner-occupied homes, the median home value in the Moncure CDP falls to \$77,000.

Other highlights from Census Bureau ACS estimates for the immediate Moncure area:

- The great majority of housing units there were built between 1980 and 1999;
- The median monthly housing cost for a renter is \$775, lower than the median county-wide and across the Triangle.

During construction of the VinFast automotive plant, there could be demand for temporary housing. Many construction workers may commute from their homes or rent apartments in nearby cities, yet some additional demand could exist in southeastern Chatham. Based on input from peer communities, demand could increase at recreational vehicle (RV) parks in the area. Workers might choose to live at a nearby RV park during the week, and return home on the weekends. As a result, Chatham County could see requests for new or expanded RV parks.

Population Projections:

The first section of Part 1 described recent trends in population in the Moncure CDP, the full study area, the county, the region and the state. This section sets forth population projections over roughly the next 17 years, from 2023 to 2040. These future estimates are based on historical trends. They are not necessarily the growth rates that will occur. These projections do not at all reflect any recommendations that the consultants might provide about how much or where growth should occur in the future. We have simply extrapolated from prior trends to get a sense of the possible demand for growth in the coming years, based on history.

To project population changes through 2040, we used 10-year projections provided by global data and analysis provider Lightcast, and extrapolated those to 2040. We were not able to use the exact same boundaries as for the Moncure CDP and full study area, but approximated those through selecting ZIP codes and census tracts. These produced somewhat larger areas than the Moncure CDP and study area, but areas that still capture the largely rural attributes of southeastern Chatham County.

Over a 17-year period, these forecasts indicate a 39 percent population gain in the area around Moncure and a 32 percent increase in the larger southeastern Chatham area. Chatham County itself is forecast to have a 34 percent population gain. All of these are greater than the 24 percent increase projected for the Triangle region (the Raleigh-Durham-Cary combined statistical area or CSA). It is unlikely that any of these forecasts incorporated the VinFast announcement or any other recent job creation announcement.

It is important to note that these projections do not reflect assumptions about the impact of VinFast or other recently announced economic development projects. Rather, these numbers give the community and the county a "baseline" understanding of potential growth rates based on historical trends.

Population Projections 2023 - 2040

	Total Percentage Change	Annual Percentage Increase	Total Numerical Increase
Triangle Region	+ 24%	+ 1.26%	+ 535,870
Chatham County	+ 34%	+ 1.76%	+ 28,050
Southeastern Chatham	+ 32%	+ 1.66%	+ 5,120
Moncure Area	+ 39%	+ 1.97%	+ 1,680

For comparison, the North Carolina Office of State Budget and Management (OSBM) also provides county-level projections through 2040. For Chatham County, the NC OSBM forecasts that the county will add 25,835 residents between 2020 and 2040, a percentage increase of nearly 34 percent. This is very similar to the population gains projected by Lightcast.

It is difficult to predict how the demographics of the population might change over time. With major job creation projected from the VinFast project, demographics could shift if a significant portion of those workers live in Chatham County. If so, it is likely that the median age in southeastern Chatham could move lower, and the average household size could also decline.

Part 1 Key Findings

- Recent population estimates:
Chatham County 79,500
Study Area 4,030
Moncure census-designated place (CDP) 776
- Chatham County's population is 3.7% of the Triangle's total population.
The study area contains about 5% of the county's total population.
The Moncure CDP contains about 1% of the county's population.
- Moncure's population has a relatively large share of Black and Hispanic residents.
Incomes in Moncure are well below county-wide levels, but about the same as state averages. It has a low poverty rate.
The full study area is more affluent than the immediate Moncure area.
- Moncure and the study area have small labor forces and very low unemployment rates.
Jobs for Moncure residents are more concentrated in blue collar occupations like construction.
- Moncure has moderate home values (much lower when mobile homes are included) and moderate housing affordability.
Most housing units in Moncure are mobile homes.
The percentage of vacant housing units is about the same as the state average (between 11% and 12%).
Chatham County, the study area, and Moncure have relatively little rental housing and few apartment communities.
- Based on existing population trends, Chatham County, southeastern Chatham, and the Moncure area are projected to see population growth of about 35% between 2023 and 2040. This equals an increase of approximately 1.75% per year.
This growth rate is higher than that for the entire Triangle region (24%).

Chatham County Moncure Small Area Plan Economic Leadership Tasks

Part 2: Peer Community Review

Our research for this plan included a review of small communities in the southeastern United States that have a large auto plant. These communities have experienced major capital investments and job creation from an auto manufacturing facility and suppliers. County staff and the consulting team felt it important to assess how the opening of an auto plant impacted places similar to the Moncure area and Chatham County, in order to add to the base of knowledge while developing a plan and during the Board of Commissioners consideration of plan options. The experiences of other communities in no way determine what will happen in the Moncure area, but they help us to understand the possibilities.

We examine the impacts these communities have dealt with: population growth, demand for new housing, and demand for non-residential development of various types. We also look at fiscal impacts on local governments – what has been the balance between new revenues and the need for additional services and facilities? The impacts have varied between communities, and have not always been what one might have expected.

The four small communities we researched are located in Kentucky, Georgia, and Mississippi. An automotive plant located in one of these as long ago as 35 years (Georgetown, KY) and as recently as 12 years ago (Blue Springs, MS). At the time of the plant opening, they ranged in population from just 230 residents to 13,000 residents. The largest municipality now has a population of about 37,000. These four communities are described below, in order from the longest experience hosting an auto plant to the most recent.

A. Georgetown and Scott County, Kentucky

Georgetown is a small, central Kentucky city located 13 miles from downtown Lexington. It is 70 miles from both Cincinnati OH and Louisville KY. It has hosted a Toyota auto plant since 1988, and this plant is the largest Toyota facility in the world. Since the late 1980s, Georgetown's population has grown from 11,000 to 37,000 while Scott County's population has increased from 23,000 to 58,000.

B. Canton and Madison County, Mississippi

Canton is located in central Mississippi, 26 miles from the state capital of Jackson (population 150,000). Canton is the county seat of Madison County. A Nissan plant has been located just outside the city since 2003. While Canton has not grown during that time – falling from a population of 13,000 to 11,000 – Madison County overall has grown substantially, increasing from 75,000 people to 109,000.

C. West Point and Troup County, Georgia

West Point has hosted a Kia auto facility since 2009. West Point is located on the Alabama state line, southwest of the Atlanta metro area. It is north of Columbus, GA and Auburn, AL. This area has experienced little growth since production began at the Kia plant. West Point's population has grown from 3,400 to 3,700. Troup County has

increased slightly, from 67,000 to 69,500. West Point also adjoins Harris County, GA, which similarly has had a small population gain, moving from 32,000 to 34,700 residents since the auto plant opened.

D. Blue Springs and Union County, Mississippi

The very small village of Blue Springs, located in Union County, has hosted a Toyota auto plant since 2011. Blue Springs is in northwest Mississippi about 95 miles from Memphis, TN. The nearest sizable city is Tupelo (in neighboring Lee County), with a population of 38,000. Since the Toyota facility opened less than 12 years ago, the village of Blue Springs' population has increased from 230 to 440 people, while Union County's population has moved from 27,000 to 28,000.

Impacts in Georgetown and Scott County, Kentucky

Toyota opened a manufacturing facility in Georgetown in 1988, when the city had a population of about 11,000. The Georgetown plant is now Toyota's largest worldwide. State-led improvements for the project included a new sewer plant, interstate interchange, and bypass road. Over 35 years, Toyota has invested approximately \$8.5 billion in the facility and it employs 9,000 people. Workers are said to come from over 80 counties in Kentucky. There have been no major layoffs. One significant employment change came in 2021, when Toyota announced that it would convert 1,400 temporary staffers (employed through Kelly Services) to full-time Toyota employees, and that all new hires from that point forward would be full-time Toyota employees. There are about 100 Toyota suppliers across Kentucky. A research study indicated that Toyota supports a total of 29,700 jobs in the state.

Toyota is regarded as a "very good corporate citizen," with a longtime local leader saying it is "hard to imagine one being better." The Toyota plant was built just outside Georgetown but early on, city leaders were able to persuade Toyota to request annexation into the city. Toyota has also made additional contributions for local projects, including assistance with building a new high school and buying land for a new city-owned business park.

In Georgetown, demand for industrial space has been consistently strong across the decades. This includes space needed by Toyota, suppliers, and other industries as well. Non-automotive industrial companies have chosen to locate in Georgetown even understanding that they will compete with Toyota's wages. Warehouse and distribution demand has not been as strong (perhaps due to proximity to the leading logistics hubs of Louisville and Cincinnati/Northern Kentucky), though increasing in recent years.

For non-industrial development – particularly housing demand – and population growth, local leaders say that the biggest surprise was that everyone locally expected an "immediate boom" that "didn't happen." Growth projections by an in-state university were "wildly" high and didn't pan out. Few Toyota employees moved to the city and county initially, preferring to remain where they lived despite long commutes. Georgetown's longtime mayor Tom Prather noted that the city also lacked housing options at various price levels, had a planning process that was probably too rigid, and saw that neighboring communities were more ready and able to attract new residents. Prather says that it took many years for even one-third of Toyota workers to live in Georgetown and Scott County.

City and county growth did eventually come, and is strong now. Georgetown has grown from a population of 11,000 to 37,000 over more than three decades, with the county increasing from 23,000 to 58,000. But these new residents may not be driven primarily by Toyota. Research by the city indicates that 85 out of every 100 new residents work outside Scott County, making Georgetown much more of a bedroom community.

While Georgetown does have a decent supply of lodging options, retail and office growth has been muted since Toyota arrived. The director of the city-county planning commission says that, somewhat surprisingly, retail has “never really taken off.” With shopping destinations in much larger Lexington just 10 to 15 minutes away, those are likely meeting local and regional shopping demand.

In recent years, Georgetown has experienced stronger demand for attached housing – apartments and townhomes. It had a deficit in those housing types compared with peer communities in the region. The planning director is not sure if this recent demand is due to any Toyota influence. It could be pent-up demand or the preferences of younger generations.

From a fiscal standpoint, Toyota and its suppliers have contributed greatly to local revenues (local governments in Kentucky rely heavily on payroll taxes). Initially, the influx of additional revenues was credited with building a new high school and “transforming” the professionalism of police and fire staff and the services they provide. A 2011 thesis by a student at Eastern Kentucky University notes that Toyota “made donations and allowed the plant to be annexed by Georgetown in order to help alleviate the pressure the facility placed on local public services.”

Still, Georgetown is not necessarily thriving fiscally. As the tax base has grown, local government has consistently reduced the tax rate so that government revenues have stagnated. A 20-year review by Georgetown shows that the city receives the same revenues as it did 20 years ago, adjusted for inflation, while serving a much larger population. Georgetown has both lower total revenues and lower expenditures than almost all peer cities in Kentucky. In a growing community, this “dilutes” the government services that are provided. For example, the number of police officers per resident has fallen by more than 50 percent in two decades. This study also showed that the local property tax rate is one-fourth of the peer community average in Kentucky. Former mayor Prather said that due to the low property tax rate, residential growth “puts us underwater.” The planning director says that in placating longtime residents via a low property tax rate, local governments are overly reliant on Toyota and payroll taxes.

Advice from leaders in Georgetown and Scott County include:

- The importance of building a close relationship with the auto company, traveling to their home country if needed. They need to know how important their facility is to your community, and that you care about the relationship;
- Good capital improvements planning to complement comprehensive plans; and
- A focus on building capacity and funding for emergency services.

One said that it is “hard to imagine” a facility of VinFast’s size being located in an unincorporated community.

Impacts in Canton and Madison County, Mississippi

Nissan's plant in Madison County – just outside the county seat of Canton – was Mississippi's first auto plant when it opened on a 1,400-acre campus in 2003. Over a 20-year period, Nissan has invested between \$4.0 and \$4.5 billion into the facility. Employment levels there have averaged 5,000 workers, with fluctuations of plus or minus 500 based on production demand. As with the Toyota facility in Kentucky, workers come from near and far, living in an estimated 82 counties. Nearby suppliers add 3,000 to 4,000 jobs. A local official states that Nissan exceeded its initial investment and employment goals. A 2016 study estimated that the facility spurred the creation of 25,000 jobs across the state. Another study, completed in 2017 as a University of Mississippi student honors thesis, noted that while Mississippi lost almost 20 percent of its manufacturing jobs between 2003 and 2015, Madison County grew manufacturing employment by more than 40 percent. In addition, it found that the 2015 average manufacturing wage in Madison was \$10,275 more than the statewide manufacturing average. However, the 2017 study also concluded that state projections of indirect (or multiplier effect) job creation in the area had likely not been met.

Madison County's population has grown by 45 percent in 20 years, but its economic development director says many factors are at work, not just the presence of Nissan. Madison is a relatively affluent county with a reputation for a top-quality school system, and is able to draw new residents from the population of 700,000 living within a 45-minute drive time, as well as from out of state. The county's median household income is 53 percent higher than the statewide median, and is projected to grow faster than state and national trends. Apparently much of the growth is occurring in the southern part of the county – closer to the state capital of Jackson – rather than near Canton in the middle of the county.

Meanwhile, Canton's population has actually decreased over 20 years, from approximately 13,000 residents to 11,000. Canton is much less affluent than the county as a whole, with a median household income and per capita income that are just 51 percent of Madison County's. Canton has a much larger percentage of Black and Hispanic residents – both more than twice the percentage found countywide.

Madison County has experienced a great deal of new development, though with most of it occurring in the southern part of the county. This includes new single-family housing, but not apartments as the county has a moratorium on their approval. Some new apartments have been built in the city of Canton. Nearly 20 hotels have opened in the county in the last two decades, targeting a mix of business and leisure travel. There are also new retail and entertainment (lifestyle center) developments in cities such as Ridgeland in the south of Madison County. Industrial space has seen strong demand, including a new 1,000 acre industrial park across from Nissan near Canton.

An unexpected development trend near Canton has been the creation of several new RV parks, which appeal at least in part to Nissan workers. A good number of Nissan employees who live in faraway counties stay in an RV park during the week, and return home for the weekend.

Tax revenues benefit general county funds as well as the Canton city school district. The county's tax rate has remained steady as property values increased. The higher total revenues have been used for infrastructure needs – such as water, sewer, and road improvements – and for the construction of five new schools in central Madison County.

Local leaders there suggest that communities getting a new auto plant strive to “upsized” or “over-engineer” infrastructure (including water and sewer facilities and road interchanges) to provide additional capacity for future growth.

Impacts in West Point and Troup County, Georgia

South Korean automaker Kia opened a manufacturing plant in West Point, GA in 2009. Since that time, Kia has invested about \$2 billion and employs 2,500 to 3,000 workers there. There are also four major suppliers on the campus, bringing total daily employment to around 5,000. A supplier corridor about 50 miles long is said to exist around West Point – in both Georgia and neighboring Alabama – with a total of 60 supplier firms.

After Kia opened, Troup County (where West Point is located) experienced a gradual but ultimately dramatic reduction in its unemployment rate.

	Troup County Unemployment Rate
Summer 2009	15.3%
Summer 2012	10.0%
Summer 2014	8.0%
Summer 2016	5.5%
Summer 2018	4.0%
End of 2019	3.0%

West Point and the two adjoining counties have seen little population change since 2009. The city’s population has risen from 3,400 to 3,700. Troup County has edged up from 67,000 to 69,500 while adjacent Harris County has experienced a similar small gain, from 32,000 people to 34,700.

West Point’s longtime city manager notes that the timing of Kia’s plant opening played an important role in these muted growth trends. After the facility was announced in 2006, developers began buying up nearby land, and thousands of new homes were planned. Annexations grew the city from four square miles to 12 square miles. But then, America’s financial crisis and the Great Recession occurred. As a result, the city manager says that “nothing happened” in the area and many developers went bankrupt. Development is now coming back slowly. However, some who bought land at elevated prices from 2006 to 2008 are still looking to sell at those price levels, dampening activity.

A local leader says that West Point has been something of a “donut hole” in terms of growth, with rapid growth in the Atlanta metro area to the northeast and the Auburn, AL area to the southwest. Even LaGrange, 16 miles away in Troup County and with a population of 31,500, is experiencing more growth. For example, several hotels including a Great Wolf Lodge have located in LaGrange since Kia arrived, but none have come to West Point.

West Point has generally had the revenues it needs to provide public services and address facility needs. City revenues and budgets increased each year for the first 10 years since Kia’s arrival, and then leveled off. This year (2023) will be the final year for any Kia tax incentives, so

all of their property and activities will become 100 percent taxable. West Point's city manager notes that the Kia campus does not generate many service needs, and with small population growth the city has not experienced a large increase in other community service demands. Schools there are a county function, but with modest population growth there has not been great demand for new schools.

There have been some major public improvements. The city was able to implement a \$24 million water and sewer project backed by Kia's revenue stream as a major customer. The wastewater treatment plant was under an EPA consent decree at the time. West Point also built a new fire station and increased the size of its police force. Perhaps the biggest negative fiscal issue arose after the State of Georgia built a four-lane highway spur running five miles from the interstate to the Kia campus. The state built the road and deeded it to the city. Now, years later, a resurfacing project will cost the city \$7.5 million, and the city is not currently able to fully fund this work.

Not surprisingly, West Point's main advice to other communities is to prioritize capital improvements planning and funding mechanisms.

Impacts in Blue Springs, Union County, and neighboring counties in Mississippi

Toyota opened a manufacturing facility in the small village of Blue Springs, MS in 2011. Company investment at the plant totaled approximately \$1.2 billion as of 2019. Toyota employs about 2,400 workers, while suppliers within an hour of Blue Springs add another 2,500 jobs.

Since 2011, there has been little population change in Blue Springs (increasing from 230 residents to 440) or Union County (moving from a population of 27,000 to 28,000). Union County's tax assessor and tax collector indicates that most growth has gone to the nearby city of Tupelo (population 38,000) and its county, Lee County. The agreements that landed Toyota involve three counties – Union, Lee, and Pontotoc – which share in the increased revenues from the site. Each county has a different plan for distributing these revenues.

Toyota is exempted from real estate property taxes until 2026, but makes payments in lieu of taxes to the three counties. The payments in lieu originally represented about one-third the amount of property taxes exempted. When the exemptions end in 2026, local revenues to the three counties from the Toyota facility will approximately double. The Union County tax collector indicates that the fiscal impacts have been positive while not fulfilling the grander "dreams" that the county school system might have had initially. There has also been some growth in sales tax collection in Union County, due to an increase in visitors and commuter traffic.

Toyota also has been very helpful in building an endowment for county schools and paying for vocational training programs. The president of the influential Community Development Foundation of Tupelo (which helped to create the regional cost-and-revenue-sharing agreements) indicates that Toyota gave \$5 million per year for 10 years to build a school endowment that is now worth about \$60 million. The auto maker also gives \$750,000 or more annually in community mini-grants to civic groups and other organizations.

The tiny village of Blue Springs has not experienced many impacts. Many workers travel from Tupelo, which offers more housing choices as well as shopping. The Community Development Foundation president says that most growth has gone to "where it already was." More sizable communities are getting the residential growth, and Toyota employees are accessing services

close to where they live rather than expecting them in Blue Springs. Since the auto plant opened, for example, Tupelo has gone from having four bank branches to 13.

Several supplier firms for Toyota have located in Union County's seat of New Albany (population 7,700) as well as in Lee and Pontotoc counties. But while there are a few new subdivisions in Union County, they have not created significant change. There has been "no golden goose" to make Blue Springs or other rural communities thrive immediately.

One issue impacting related development is that Toyota reserved a great deal of land around the plant, perhaps due to noise complaints it received at another U.S. facility. Many uses are not allowed in this "donut" protective area, limiting the ability to locate new housing or retail development. There are also capacity constraints from water, sewer, and other infrastructure.

The head of the Community Development Foundation believes that one game-changer for the region is higher wage levels prompted by Toyota's presence. In a long-time furniture-making region, Toyota's starting wages (now at \$22.50 per hour) have raised the bar for all employers. A 2017 research report concludes that "the plant brought an influx of quality, high paying jobs," many of which have been taken by Union County residents. A concern for Union County is the creation of indirect or multiplier effect jobs. Although manufacturing employment and all employment in Union has grown faster than in Mississippi overall, the 2017 report found that "there was not a significant amount of indirect jobs" in the county since the Toyota plant opened "that can be attributed to it."

One piece of advice from leaders in the region is to create a "community committee" to work closely with the auto maker to build relationships and prioritize long-term community goals. They indicate that Toyota has been frustrated by working toward long-range goals, only to be interrupted by requests for assistance with "emergency" needs.

Experiences in Other Small Communities

This review of peer communities is far from exhaustive. It is intended only to provide some insight into the experiences of similar small communities in the southeastern U.S. that have hosted an auto plant for varying lengths of time. Each place's insights are different, and other host communities will have different experiences to share. For example, Greer, South Carolina has been home to a BMW auto plant since 1994. Greer is close to two larger cities, Greenville (15 miles) and Spartanburg (22 miles). In the 28 years since BMW opened, Greer's population has grown from approximately 12,000 to nearly 39,000. This rate of population increase is higher than the four communities studied here, slightly faster than the growth rate of Georgetown, Kentucky.

Part 2 Key Findings

- This section evaluated trends in four small, southeastern U.S. communities that host a large automotive plant. Their length of experience with an auto plant ranges from 12 years to 35 years. At the time of plant opening, the smallest had just 230 residents and the largest 13,000 residents. The largest community now has a population of approximately 37,000.
- Original employment projections from the automakers have been met (or exceeded), and accompanied by strong job creation from numerous suppliers across a region. There have been no plant closures or major layoffs.
- Despite incentive agreements, local revenues have generally increased moderately. The auto plant campuses have not generated great need for additional government services.
- Especially in the early years, the expected boom of related development – such as new housing, retail, restaurants, and offices – didn't happen in these communities. Two primary reasons for this are 1) development went instead to larger cities nearby; and 2) many employees appear content to commute from their existing home, even at great distances. Some communities eventually experienced significant growth, while others have not.
- Leaders in these communities suggest a strong focus on infrastructure needs and capital improvements planning.

Chatham County Moncure Small Area Plan Economic Leadership Tasks

Part 3: Employment and Job Growth Projections

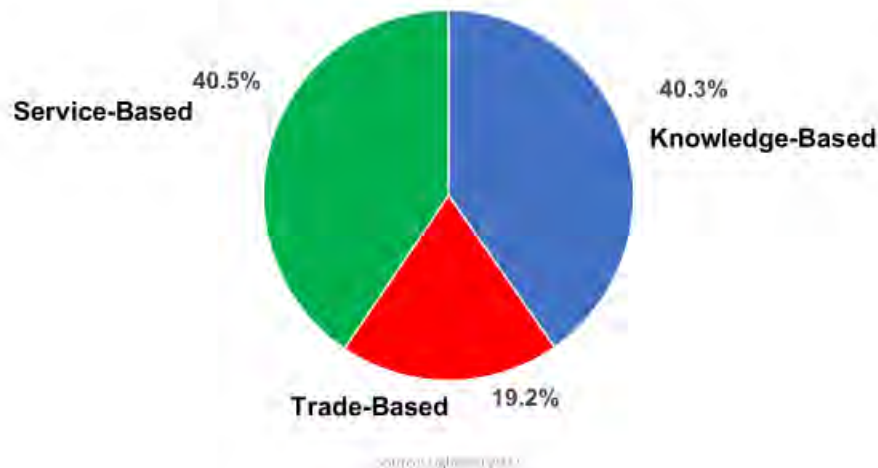
In this section, we provide a snapshot of the current employment picture, and review historical job growth trends to project potential employment growth through 2040. These projections are based on long-term trends and do not account for the proposed large job creation impacts from VinFast.

Following that, we also consider the additional impact of major job announcements from VinFast and other manufacturers in the Triangle and Triad regions. This task takes into consideration the potential spin-off effects (sometimes called “multiplier” effects) of auto manufacturing jobs to create additional jobs in southeastern Chatham County.

Current Employment by Type:

The three charts below provide a breakdown of estimated 2023 employment by type in the Triangle region, Triad, and Chatham County. The Triangle has the highest percentage of knowledge-based jobs, while the Triad and Chatham have a larger share of trade-based jobs. All three have similar levels of service-based employment.

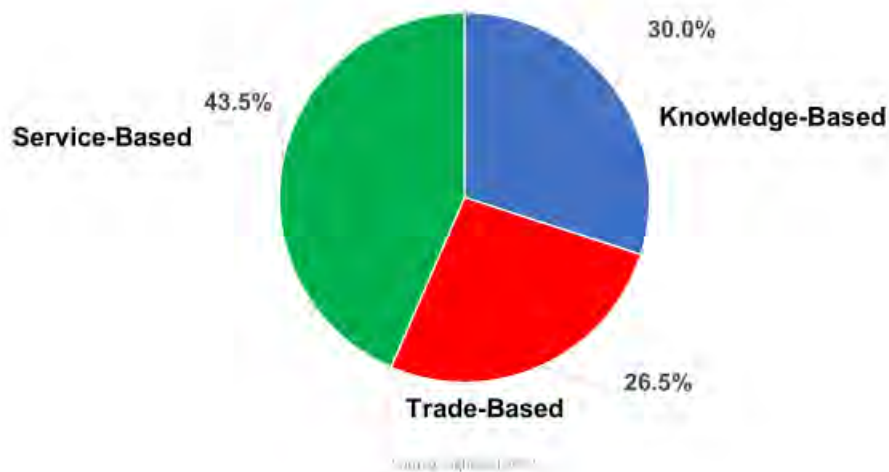
Triangle Job Types, 2023



Triad Job Types, 2023



Chatham County Job Types, 2023



Among the relatively small number of jobs currently provided in Moncure and southeast Chatham County, a much smaller share (about half the Triangle's percentage) are knowledge-based. Service occupations are also less represented, while there is a far greater percentage of trade-based jobs. As a reminder, these numbers do not reflect any jobs anticipated in association with VinFast.

Chatham County's Share of Triangle Region Jobs:

Based on Lightcast estimates for 2023, Chatham County hosts a very small percentage of the Triangle region's total of more than 1.12 million jobs. About 1.6 percent of this total is located in Chatham. Within the county, southeastern Chatham is responsible for 28 percent of the county's

employment total, with the immediate Moncure area containing 7 percent of the county total. (Again, these figures do not take into account any proposed VinFast jobs.)

Job Projections Based on Historical Trends:

To project employment growth through 2040, we again used ten-year estimates from global provider Lightcast, and Economic Leadership extrapolations of those numbers. Lightcast data looks at historical trends over the past 20 years to project future trends. We were able to provide projections for the Triangle metro region, the Piedmont Triad region, Chatham County, southeastern Chatham, and the Moncure area. As with the population projections, the Lightcast areas for Moncure and southeastern Chatham (using ZIP codes and census tracts) are somewhat larger than the Moncure census-designed place and the study area, but still provide a good estimation of conditions in this predominantly rural section of Chatham County.

The table below summarizes Lightcast and Economic Leadership's employment projections from 2023 to 2040, based on historical trends and not accounting for potential employment impacts from VinFast.

Employment Change Projections, 2023 - 2040

	Job Change Percentage	Annual Change Percentage	Total Job Change Number
Triangle Region	+ 13.3%	+ 0.74%	+ 149,262
Triad Region	+ 1.3%	+ 0.08%	+ 9,282
Chatham County	+ 15.9%	+ 0.87%	+ 2,809
Southeast Chatham	+ 3.1%	+ 0.18%	+ 156
Moncure	- 8.4%	- 0.52%	- 103

These projections show relatively robust job growth for the Triangle and Chatham County, while forecasting little (or even negative) growth in the Triad, southeast Chatham, and the Moncure area. Based on long-term trend data, the projections do not take into account major job announcements along the "Carolina Core" such as VinFast, Wolfspeed, and Toyota.

Projected Employment Change by Type:

Between 2023 and 2040, Chatham County is projected to substantially grow employment in all three categories, led by knowledge-based jobs (+20%). Service jobs are estimated to increase by 15 percent during that period, and trade-based jobs by 12 percent. Employment gains in the Triangle are projected to be led by knowledge jobs (+18%) followed by trades (+12%) and services (+9%). For the Triad – which the historical trends suggest will have little job growth at all – knowledge-based occupations are the only ones projected to see positive gains, at +6 percent.

Recent Job Announcements:

Several major manufacturing-focused job announcements have occurred recently in what is called the Carolina Core, a corridor through the central part of the state between Winston-Salem and Fayetteville. Combined, these announcements have the potential to change historical and predicted future employment patterns in central North Carolina, if the job projections are realized. The primary announcements – two of which are for Chatham County locations – have been:

- VinFast, the Vietnamese electric vehicle manufacturer planning a \$4 billion facility at Triangle Innovation Point near Moncure, to open in 2025 and employ 7,500 people by its third year of operations. More details on VinFast projections are found below.
- Wolfspeed, a Durham-based semiconductor company, plans a \$5 billion silicon carbide manufacturing plant at the CAM Site, or Chatham-Siler City Advanced Manufacturing Site. This location is approximately 32 miles from Moncure. Wolfspeed plans to employ 1,800 people with wages averaging \$77,750. The company states that it hopes to be in production there in the first half of 2024 and meet employment goals by 2030.
- Toyota is developing a \$3.8 billion electric vehicle battery plant at the Greensboro-Randolph Megasite, about 41 miles from Moncure. The battery plant is expected to employ 2,100 workers during its initial phase. Production is slated to begin there in 2025.
- Colorado-based jet manufacturer Boom Supersonic announced an airplane manufacturing plant at Piedmont Triad International Airport in Greensboro, 69 miles from Moncure. Boom Supersonic intends to start production there in 2024. The company would employ 1,750 people by 2030 and 2,400 by 2032.

Together, these manufacturers could create more than 18,000 jobs throughout central North Carolina within 10 years. Between VinFast near Moncure and Wolfspeed near Siler City, there could be 14,500 new manufacturing-focused jobs in 10 years, adding jobs above the projections that are based on historical trends, and changing the employment picture in Chatham County.

VinFast's projected 10-year timeline shows employment ramping up from 2,000 in year one to 12,500 in year five, topping out at 12,700 workers in years seven through 10. Average wages are consistently in the low-to-mid \$50,000s during the entire period. Wages are estimated to average \$53,430 in year one, \$50,580 in year five, and remain very close to that figure in subsequent years.

Projected VinFast Employment, 2025 - 2034

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Years 7-10
Employment	2,000	5,000	7,500	11,000	12,500	12,600	12,700

Effect of Employment Multipliers:

Primary or exporting industries – such as manufacturing – are also associated with additional job creation through suppliers for that industry, as well as job creation that occurs when employees spend their wages for goods and services. Numbers called employment “multipliers” have been developed for various industry sectors to estimate the amount of related or spin-off jobs that can be created throughout an economy.

The table below provides employment multipliers for the two main manufacturing subsectors associated with VinFast's electric vehicle production. The direct and indirect multipliers relate to suppliers. The induced multiplier refers to job creation from spending of wages in other, non-related sectors. In the examples below, the first industry subsector is associated with the creation of 0.44 other jobs in the economy for each initial job, for a total job creation of 1.44. The

second type is associated with the creation of another 0.26 jobs per initial job, for a total job creation of 1.26.

Electric Vehicle Manufacturing Job Multipliers:

	Initial Jobs	Direct	Indirect	Induced	Total
Motor Vehicle Electrical & Electronic Equipment Manufacturing	1.00	0.22	0.06	0.15	1.44
Motor and Generator Manufacturing	1.00	0.06	0.02	0.18	1.26

Using the electric vehicle manufacturing multipliers, we can see their estimated impact on job creation in addition to the hiring numbers projected by VinFast.

Multiplier Effect on Employment



We will use these multipliers in Part 4 to help project new housing demand in Chatham County, including demand supported by employment at VinFast and their suppliers. Our peer community research in Part 2 suggests that the *induced* spin-off jobs from employee spending have not always occurred in small communities with an auto plant – or are at least difficult to verify – so those induced multipliers are not used in Part 4.

Part 3 Key Findings

- Chatham County currently hosts a very small share of the Triangle region's jobs (1.6%). Within Chatham, the southeastern portion is home to 28 percent of all county jobs.
- Based on projections from long-term trends, Chatham County (+15.9%) and the Triangle (+13.3%) are predicted to have strong job growth through 2040, while southeastern Chatham (+3.1%) and the Triad (+1.3%) would see modest job growth. The immediate Moncure area is projected to experience a small decline in employment. These estimates do not incorporate recent major economic development announcements.
- Major job creation announcements along the corridor known as the Carolina Core – from VinFast, Wolfspeed, Toyota, and Boom Supersonic – could mean the creation of over 18,000 jobs within 10 years. VinFast near Moncure and Wolfspeed near Siler City could generate 14,500 new jobs in Chatham County over 10 years.
- Employment multipliers used by economists to estimate related job creation generated by electric vehicle manufacturing indicate that 0.35 additional jobs will be created for every VinFast job. However, research in small peer communities suggests that, in their experience, the actual number of spin-off jobs may be less than expected.

Chatham County Moncure Small Area Plan Economic Leadership Tasks

Part 4: Market Assessment

In this section, we use the information gathered in Parts 1, 2, and 3 to inform market demand estimates for residential and non-residential uses in the Moncure area. These projections take into account existing growth trends in the Triangle region, Chatham County, and Moncure, as well as the VinFast employment announcement.

A. Housing

For baseline housing demand projections based on continuation of existing population trends, we adopt a 35 percent population gain from 2023 to 2040 for Chatham County, the study area, and the Moncure census-designated place (Moncure CDP) as estimated in Part 1. This 17-year increase equals about 1.75 percent annual population growth. This growth rate is higher than the 24 percent total growth projected for the Triangle region, and does not account for major employment announcements such as VinFast.

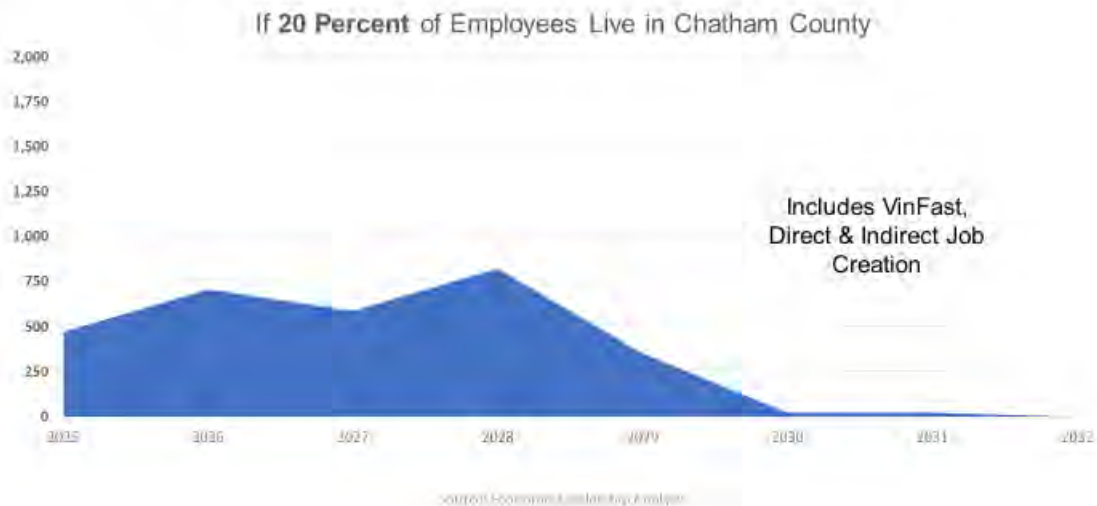
Based on the estimated population growth and average household size, Chatham County would have significant annual new housing demand. The sparsely populated study area and Moncure CDP would each see modest demand based on historical trends.

Housing Unit Demand Based on Population Trends

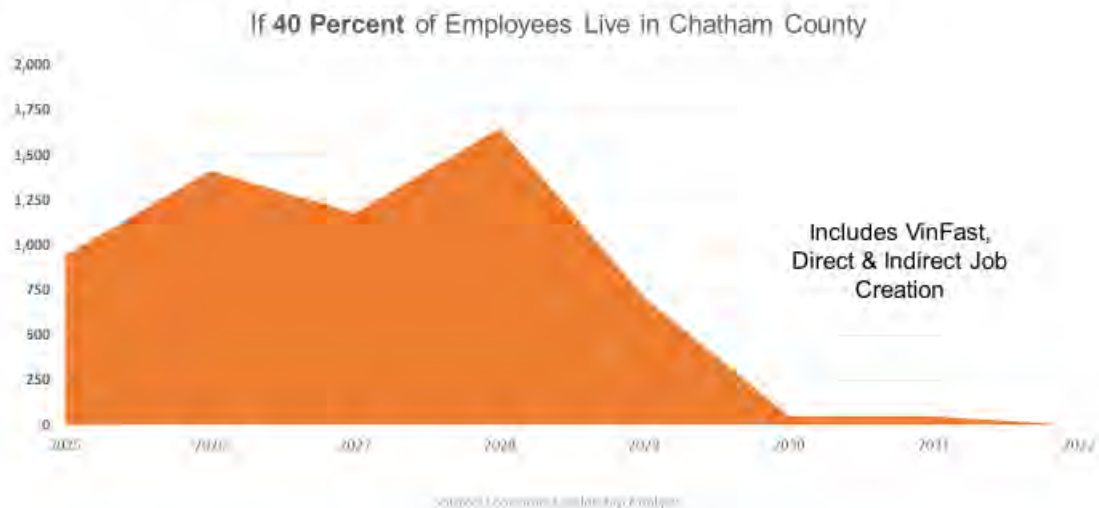
	2023 – 2040 Population Growth	Total New Households	Projected Housing Unit Demand Per Year
Chatham County	+ 28,050	11,639	685
Study Area	+ 1,411	578	34
Moncure CDP	+ 273	108	6

In addition to this demand based on population trends, we can consider additional demand driven by job creation at VinFast and its suppliers. The following two charts show the annual demand that could be created as VinFast ramps up its hiring starting in 2025, until employment levels stabilize in 2032. An important consideration is what percentage of these new workers might live in Chatham County. The first chart shows potential demand if 20 percent of VinFast-related workers live in Chatham, while the second assumes that 40 percent will live in the county.

Housing Unit Demand from VinFast-Related Jobs



Housing Unit Demand from VinFast-Related Jobs



A lesson from the small peer communities we studied is that housing demand near a new auto plant was not as great as they anticipated, at least not in the initial years after a plant opened. It appears that many employees are willing to commute long distances rather than relocate. Also, demand in the immediate area could be dampened due to local issues like the availability of infrastructure, housing choices, childcare, shopping, and entertainment options nearby. It is

possible that 40 percent of VinFast-related workers could live in Chatham at some time in the future. However, this is unlikely to be the case during the initial years of the facility, with 20 percent being more likely.

Still, even with only 20 percent of new VinFast workers and supplier employees living in Chatham County, that would create significant additional demand during the period when VinFast is ramping up hiring each year. Based on existing population growth trends, Chatham County's expected demand is for about 685 new housing units a year, including about 34 new units per year in the full study area (not just Moncure). In addition, demand for this many additional units (*see below*) could be created by VinFast-related hiring.

Year	Added Demand from VinFast-Related Hiring (20% of Hires Living in Chatham County)
2025	472
2026	708
2027	590
2028	826
2029	354
2030	24
2031	24
2032	0

This potential demand averages 428 new units per year over the first seven years, or 590 new units per year during peak hiring over the first five years. Adding in the estimated 34 new housing units needed per year in the study area based on population growth estimates, this would indicate a total demand of **462 units annually over the first seven years** (or 624 new units a year averaged over the first five years) of the plant's existence.

• **Where would demand be concentrated?** For good proximity to the industrial development at Triangle Innovation Point, most demand would be expected in southeastern Chatham and the Pittsboro area. If it is not accommodated there, it is reasonable to assume that demand would be focused along the U.S. 1 corridor to the south and north of Moncure, including in Sanford, Apex, and Holly Springs, and perhaps Fuquay-Varina. The location of where the new demand stemming from VinFast would be concentrated is a function of the housing markets, infrastructure availability, commercial activity, and whatever land use plans and regulations apply in the area.

• **How much demand could be met by existing or approved housing in Chatham?** The existing housing stock in the Moncure CDP and the study area is small and heavily owner-occupied, so the number of units on the market at any given time will likely be limited. Vacant units could help somewhat, but again in a limited way. According to 2022 estimates, the Moncure CDP has about 40 vacant units and the whole study area only about 210 vacant units. It is reasonable to assume that a portion of existing units may be in poor condition requiring extensive renovation, or have uncertain legal status (such as being tied up in estate proceedings). This would reduce their ability to meet new demand.

A more likely source for meeting demand is approved new development at Chatham Park. A team member there notes that Chatham Park is increasing its focus on developing its southern end, near Moncure Pittsboro Road, in part to address greater demand from the Moncure area. Once a sewer line is in place to accommodate development here, Chatham Park could build 500 homes (a mix of detached units and townhomes) and 200 apartment units per year in the southern portion. Depending on price levels and competition, this could meet a significant share of the need – perhaps 25 percent. The sewer line is projected to be in place early in 2025.

• **What types of new housing would help to meet the demand?** Housing professionals describe the current, small market for new homes in southeastern Chatham as dominated by a large single-family home on a large lot, served by a well and septic system, and priced at \$700,000 or more. Based on price and the ability to build those in volume, this type of home will do little to serve workers with annual earnings in the low to mid \$50,000s. Elsewhere in the county, places like Chatham Park and Briar Chapel offer similarly-priced large homes (on smaller lots with public water and sewer service).

Chatham Park has a wide variety of housing types, from smaller detached homes (1,500 to 1,800 square feet, priced around \$400,000), very small cottages (starting at less than \$300,000), and apartments for rent. A current apartment listing in Chatham Park asks \$1,989 per month for a two-bedroom, two-bath apartment with 1,073 square feet. Duplex homes are also planned there. This variety of housing choices, pricing, and ownership versus renting should address some of the demand in Moncure and the study area. However, the price per square foot for all of these is relatively high, and will face competition in places like Sanford and Apex that is usually priced lower per square foot.

Housing and real estate professionals who know the region well suggest that new, mixed-income neighborhoods in the Moncure area and the U.S. 1 corridor could serve the new demand if housing units are able to be built at competitive prices. If built with some density and a mix of types (apartments, townhomes, and single-family detached homes of various sizes), there could be a “massive opportunity” for Chatham County to provide the high quality of life for which it is known, but at more affordable price levels.

This would include small and mid-sized detached homes and townhomes priced at \$350,000 or less, targeting a cost of about \$200 per square foot. This will not necessarily be easy. One regional home builder says they’ve seen “nothing” able to be built for under \$300,000 since COVID, and even the low to mid \$300,000s will be difficult to achieve. For apartments, targeting a rent of \$1,500 or less per month for a two-bedroom unit would generally place it between competition in Apex and Sanford. Across the Durham-Chapel Hill MSA (which includes Chatham County), the median rent for a two-bedroom apartment is \$1648.

For housing options that are more in line with trends in the Triangle region and that appeal to younger workers who may want to move to southeastern Chatham, a mix with more apartments for renters and townhomes for owners would be needed. A rough outline of a mixture that would address likely demand might be:

- 50 percent single-family detached homes;
- 20 to 25 percent townhomes; and
- 25 to 30 percent apartments.

B. Industrial

The U.S. industrial property market has been extremely strong in recent years, driven by booming e-commerce sales that spur demand for warehouse and distribution centers. Manufacturing (including potential demand from “reshoring” of plants back to the United States) has also experienced good space demand. Due to uncertainty about the American economy, many observers think that planning and new construction for additional industrial facilities will ease throughout 2023.

According to multiple sources that track the market, the Triangle region has about 60 million square feet of industrial space (including manufacturing, warehouse, and “flex” space that is occupied for life sciences and many other uses). Recent vacancy rates are very low, at less than five percent. In the most recent quarter, net “absorption” of space in the Triangle was +394,000 square feet, indicating strong demand for industrial properties. Absorption measures the net movement of users into space compared with the amount of space that is vacated. In the last year, roughly 1,000,000 square feet of new space was delivered to the Triangle market, and nearly 4,000,000 square feet is under construction.

Most sources that track industrial space throughout the Triangle do not cover southeastern Chatham County as a separate submarket. The nearest submarket with comprehensive data is southern Wake County, which includes Apex, Holly Springs, Fuquay-Varina, and New Hill. This area has about three million square feet of industrial space, or five percent of the region’s total. Recent vacancy was approximately 15 percent, well above the regional average. Net absorption of space in southern Wake over the past year was less than 80,000 square feet.

The relatively small numbers in the southern Wake submarket would not suggest much new industrial demand for the Moncure area. However, commercial real estate brokers with great industrial experience believe that Moncure – and the rest of the U.S. 1 corridor southwest of Raleigh – is well-positioned to accommodate more of the Triangle’s industrial space demand in the near future. They point to U.S. 1 being a quality, four-lane divided highway with speed limits up to 70 miles per hour, and currently being lightly traveled. They also note the development of the FedEx distribution facility in the county, and several new industrial buildings on the north side of Sanford that have been leased quickly. VinFast is expected to further solidify southeastern Chatham County as a viable location for more industrial development.

Current trends would indicate modest demand for new industrial buildings in southeastern Chatham – not more than 100,000 square feet per year. However, recent activity along the U.S. 1 corridor and the VinFast project could spur greater demand – for perhaps 250,000, 400,000 or even 500,000 square feet annually.

Projected New Industrial Space Demand – Southeastern Chatham

Low Range: 100,000 square feet annually

High Range: 400,000 square feet annually

C. Retail

The retail space market in the U.S. was able to weather the storm of COVID-related shutdowns and surging online purchases by having record low levels of new construction over the past three years. As a result, retail vacancy nationwide is less than six percent, a 15-year low. Raleigh-Durham was one of a few markets with vacancy under four percent at the end of 2022. It is expected that new retail construction across America will continue to be cautious and muted, though more robust in markets with strong demographics like the Triangle.

The Triangle retail market contains about 47 million square feet of space. Net absorption of space over the last 12 months was a positive 979,000 square feet. The closest tracked submarket to Moncure is southern Wake, which has 4.3 million square feet or nine percent of the region's total. This submarket has low vacancy and positive absorption of 103,000 square feet of space in the last year.

An unincorporated, mostly rural area such as that around Moncure should expect to see little demand for new retail, which typically doesn't arrive early to a market but "follows the rooftops" – that is, it follows where new homes and residents are already going. Developments such as VinFast and FedEx could drive demand for small, stand-alone uses such as gas station/ convenience stores, dollar stores, and quick-service restaurants. Small southeastern communities where auto plants have opened have generally experienced less retail development than they expected. However, if denser housing is planned and developed near Moncure, additional retail could be attracted in a mixed-use setting or in close proximity to neighborhoods. This could include uses such as a grocery store, sit-down restaurants, or services like a daycare center – assuming that sufficient residential development materializes.

Projected New Retail Space Demand – Southeastern Chatham

Low Range: 5,000 square feet annually

High Range: 25,000 square feet annually

D. Office

A slow return to the workplace after COVID shutdowns – influenced by greatly increased use of hybrid work arrangements (part at-home and part in-office) and more full-time remote working – recently pushed the U.S. office market to an all-time high vacancy of more than 18 percent. However, this is only slightly higher than peak vacancies during the previous two recessions. According to one source, a net of 37 million square feet of office space was vacated in 2022.

The American office market is not in crisis mode, but expiring leases in the next few years could further pressure vacancies if companies decide that they need less space. Office buildings that are in demand and fully leased tend to be the newest properties with the best amenities in the best locations. Older buildings or those in less desirable locations are likely to struggle. New construction levels have been high in recent years but are expected to slow.

The Triangle region's office space market contains approximately 60 million square feet. Recent vacancy is about 12.5 percent (not including space available for sublease). Sources differ, but one shows more users moving out of space than moving in during each quarter of 2022 in the Triangle. Near Moncure, market trackers estimate the south Wake or southwestern Wake submarket to have about 500,000 square feet of office space, or less than one percent of the regional total. Vacancy is about 10 percent.

A small, unincorporated area such as Moncure should expect to have little demand for new office space, particularly in an environment where new construction nationally is likely to be reduced and concentrated in well-established locations that are most convenient for employees. Industrial developments like VinFast and FedEx could have a small but certainly not dramatic impact on office demand. If new housing is created in mixed-use neighborhoods nearby, it would be reasonable to expect some office uses to locate there.

Projected New Office Space Demand – Southeastern Chatham

Low Range: 1,000 square feet annually

High Range: 10,000 square feet annually

E. Lodging

The U.S. lodging sector continues to rebound well after the COVID-induced economic shutdown. Data on the closely-watched measure of RevPAR (revenue per available room) through the end of 2022 shows marked improvement over 2021. Hotel RevPAR was up by 30 percent across America, by 26 percent in the South Atlantic states, and more than 22 percent in North Carolina. According to figures from the NC Restaurant & Lodging Association and Smith Travel Research, RevPAR in North Carolina in January 2023 was 79 percent above pandemic lows two years before.

Hotels in the Triangle region show even stronger performance. Looking at a five-year period before the pandemic upheaval, Triangle hotels exhibited robust daily performance as well as demand for growth in the market.

Lodging Market Indicators, 2015-2019 Averages

	Annual RevPAR Change (revenue per available room)	Annual Change in Room Supply	Annual Change in Room Demand
North Carolina	+ 4.7%	+1.4%	+ 2.8%
Triangle Region	+ 5.0%	+ 2.2%	+ 3.8%

In the Moncure area and southeastern Chatham along the U.S. 1 corridor, the current lack of infrastructure and development make the area something of a “blank slate” for lodging. There is modest existing competition in Sanford, with a Fairfield Inn slated to open later this year. Similar

low to mid-priced options exist in Apex as well. Sanford also offers the Wicker Civic Center. In Pittsboro, a new Hampton Inn & Suites is scheduled to open before the end of 2023. This 120-room Hampton Inn in Chatham Park should serve an area beyond Pittsboro and help reduce the “leakage” of hotel guests outside Chatham County’s borders.

A Triangle-based hotel owner-operator notes that new lodging usually “follows behind” other development – it comes after housing, office, and retail are established in an area. Hotel guests prefer to have other amenities nearby, especially restaurants and shopping. For corporate executive travel and corporate events in this part of the Triangle, many businesses will bypass mid-level hotels and patronize upscale properties in Raleigh or Cary. As with several other development types, establishing sizable new neighborhoods and related amenities near Moncure is likely to be necessary in order to spur demand for hotel development there.

Projected New Hotel Demand – Southeastern Chatham

Low Range: no new hotels within five years; 1 new hotel within 10 years

High Range: 1 new hotel within five years; 3 new hotels within 10 years

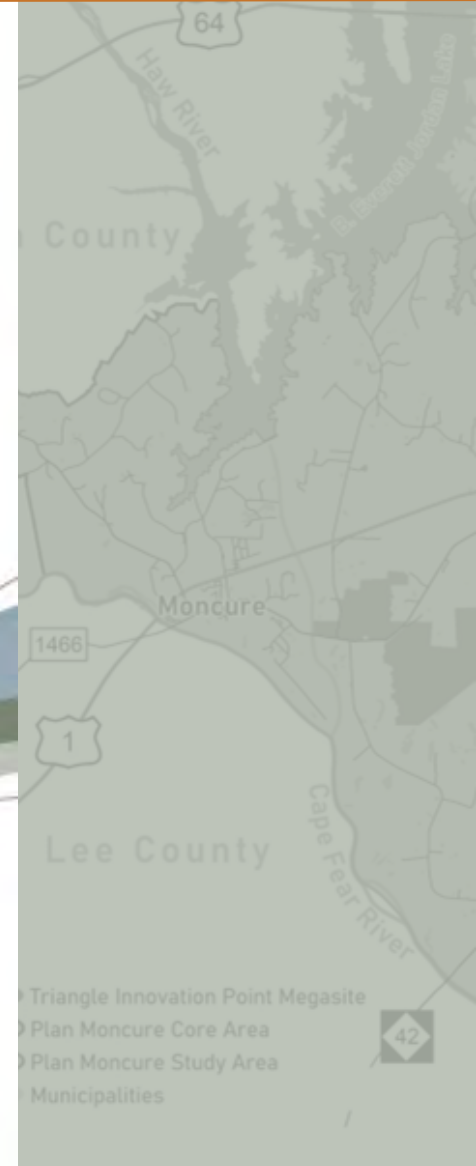
Other Notes on Tourism:

Employers the size of VinFast and its suppliers should help to support existing rural event venues in southeastern Chatham that now host weddings and other upscale gatherings. Company lunches, picnics, dinners, and retreats could supplement existing bookings – especially during slow periods from Mondays through Thursdays.

The increase in workers (whether they live nearby or commute from greater distances) and visitors to VinFast and its suppliers should bring more attention to southeastern Chatham’s nature-based, outdoor tourism assets. More people will be exposed to recreation options at Jordan Lake and elsewhere, from fishing to biking, hiking, boating, and picnicking. Employee awareness of these possibilities could spur more day trips by their families and friends, one step toward increasing tourism activities in the area.

ENGAGEMENT PROGRAM

08.16.2023



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Introduction

Planning with, not for, the Community

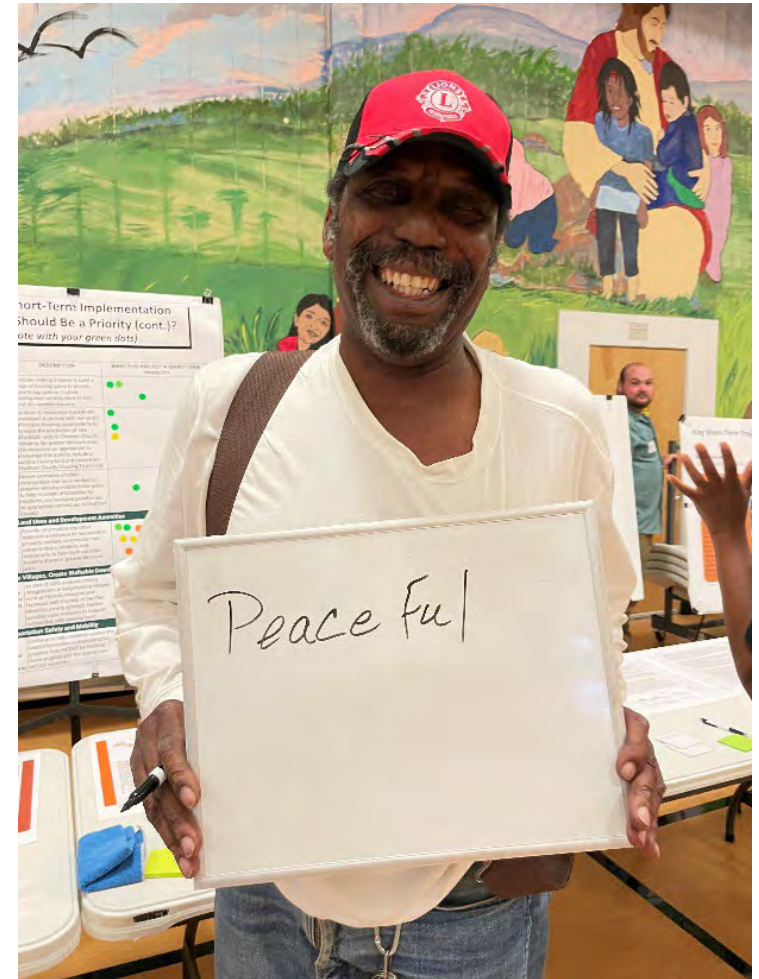
Decisions that result in change in any community are made by a variety of entities operating at the Federal, State, regional, and local levels and private sector investors. Chatham County leaders have opportunities to influence some of those decisions, such as private investment and the timing of related development activity. Only a few types of development-related decisions are completely within the County's control, including the countywide tax rate, local plans and policies, and local land development regulations (zoning and development standards).

Planning for the future provides an opportunity to manage change in accordance with community expectations and aspirations, giving the community a voice to influence the direction of future development that could occur in the next decade or more.

KEY QUESTIONS TO BE ANSWERED BY THE PROCESS

The planning process was designed to address a set of questions posed by the Board of Commissioners, including the following:

- How much development can the area support?
- With the changes that are already underway, is there an outcome that is suitable given the unique assets that define the place today, the community's interests and desires for the future, and the opportunities for economic growth that could benefit the County and the region?
- To what extent is land development limited by environmental conditions?
- How can we overcome barriers to the changes the community desires?
- Are there new County infrastructure systems and services that will be needed to accommodate projected growth?
- What can/should the County expect from future private investments to ensure the changes in the area optimize the benefits?
- What are the lessons learned from similar communities with similar projects?



Engagement Program

The planning process was designed to give community stakeholders a voice in shaping the future of this area as growth pressures begin to impact it. In this way, this process is different from other kinds of recent projects in the area undertaken by other agencies. The plan helps stakeholders describe a shared vision. Broad and meaningful participation is therefore key to a successful project. To help give the range of stakeholders an opportunity to participate in this work, the project team employed the following combination of in-person and virtual engagement tools.

PUBLIC MEETINGS

The project is holding a series of community meetings to engage stakeholders. A record of all input is available through the Chatham County Planning Department.

- **February 21 at Moncure Fire Station 6:** Resident drop-in session to hear local comments and concerns;
- **March 21 at Moncure School:** Community Open House to introduce the project to the community and get initial input on what people like about the community today, and what they'd like to see in the years ahead;
- **April 27 at Moncure School:** Community Meeting to hear opportunities and concerns from community stakeholders and get initial input on different conservation and development scenarios to study as part of the project;
- **May 24 at Moncure School:** Community Open House #2 to share results of scenario planning analysis and receive feedback on preferred scenario features from stakeholders;
- **August 9 at Moncure School:** Community Open House #3 to share draft of Plan Moncure, including vision map and implementation measures, and receive stakeholder feedback.

WEBSITE

The project includes a website that is updated regularly to provide information on the project, advertise upcoming community outreach events, and provide opportunities for public comment.

PROJECT KIOSK

Chatham County planning staff have constructed an outdoor kiosk at the Moncure Collection Center at 2855 Old US Hwy 1 with updated information about the project and a comment box to submit questions and input.

POP-UP EVENTS

The project is hosting a table at several community events to help engage stakeholders by bringing the project to them. To date, this has included the April 15th Spring Around the Loop Street Fair at Haywood.

SURVEYS

For stakeholders who may not have been able to attend some of the in-person meetings, the program has included online surveys. To date, we have received over 300 responses across three surveys.

SCENARIO PLANNING ONLINE SESSION

To share more details and answer questions about the scenario planning process, the project team held a deep dive session online for interested stakeholders.

SHARE-A-PHOTO

To help engage stakeholders in sharing the places they love in the Moncure area, the project includes a special website where people can submit a photo of a favorite place and why they love it.

INTERVIEWS AND FOCUS GROUPS

To get more detailed information on comments and concerns, as well as input and feedback on proposed public engagement methods, the project team has conducted a series of interviews and focus groups with community leaders.

By the Numbers...

2,360
Visitors

Plan Moncure Website
(through 5/31/23)

75
Attendees

3 Resident Drop-In Sessions
at Moncure Fire Station 8
(2/21/23)

163
Attendees

Community Open House #1
at Moncure School
(3/21/23)

90
Attendees

Community Listening Session
at Moncure School
(4/27/23)

75
Attendees

Community Open House #2
at Moncure School
(5/24/23)

35
Attendees

Pop-Up Table
Spring Around the Loop Street
Fair (4/15/23)

25
Attendees

**Scenario Planning Online
Session**
(6/1/23)

57
Attendees

Community Open House #3
at Sprott Center
(8/9/23)



Input by Theme

Themes from Input Received

There are a number of themes from public input provided to date by community stakeholders. These include the following, along with sample comments that are representative:

RURAL LANDSCAPE AND LIFESTYLE

- Keep the rural character – Its why we moved here.
- Small country roads, scenic farmland, natural forests and wildlife habitation, clear streams and farm ponds, bird calls, fresh air
- Keep the natural beauty and wildlife it contains!
- I want to still be able to hunt on my land.
- People moved to Moncure for peace and quiet, keep it small with small communities (Corinth Area/Buckhorn Road)
- The open space and “quiet life”
- Keep the rural tranquility of Moncure.
- Leave Moncure as it is!

ENVIRONMENT

- Partin Creek
- We have a beautiful landscape of trees, wildlife, the lake, etc.
- Preserve the forests, protect the wetlands
- There is a parcel of land supposedly purchased by Tim Sweeney that would connect the Jordan Lake protected lands with the Deep River State Park area.
- McKay Island in the Haw River
- Shaddox Creek
- Concerned about the runoff from a proposed development.
- What about PFAS?
- East River Road area, keep in conservation and do not develop.
- I want to be able to still hear the owls at night, for me that is what makes this feel like Moncure.

Community Open House #1 held at the Moncure School on March 21st hosted 125 residents, property owners, and other stakeholders. Two presentations were complemented by topic-specific information stations.





DEVELOPMENT INTENSITY / STYLE

- Low density rural/agricultural character
- Large lot neighborhoods
- No subdivision developments near trailer park
- Keep the small town feel
- Add one small shopping center, with a grocery store and maybe a few other small businesses
- Limit on RV parks
- Stop explosion of industrial development
- More housing is fine and maybe a few places to shop. But we enjoy the community living and rural aspect of the area. We don't want to be overgrown and pushed out!
- Rural housing with small grocery and restaurant but primarily residential with forest rivers and lakes
- Rural views, TREES, open space, hidden neighborhoods (use the trees rather than clear cutting).
- More neighborhoods, restaurants, schools, gas stations, and grocery stores
- Keep it small.

HISTORIC & CULTURAL ASSETS

- Merry Oaks and New Elam Church Cemetery, save them.
- Mark and Protect Historic/Cultural Site
- Consideration for any unidentified slavery graves
- Save all churches and gravesites-leave alone.
- Preserve Character of Moncure
- Keep the historical buildings
- Farmland Legacy
- Recognize Legacy of Jordan Dam
- Old Moncure School-leave
- Corinth-Church Buckhorn United Cemetery leave undisturbed
- Home across from Fire Station is a special place, leave it alone
- Leave the Old Store/Gas and Old Dance Hall with Bar alone.

“Continue to put out information and communicate with the citizens regarding Vinfast and any other development. [There is] fear of not knowing what will happen.”

---Resident of Moncure Area and Community Open House #1 Attendee

HOUSING

- Build small homes in small communities.
- Will the damage to homes be covered from the blasting at the TIP site?
- Would cracks in basement or foundation from blasts be covered by Vinfast?
- Leave Moncure Affordable

ROADS / TRAFFIC

- Congestion and safety...
- Network Improvements
- The stretch of Pittsboro Moncure Road should be mowed more often. This would reduce the number of collisions with animals and would look better.
- More speed limit signs on Gum Springs Church Road
- Bike paths and lanes to open roads up for better travel and safety
- Potholes on Pittsboro Moncure Road
- Need the potholes in the area to be repaired. Noticed that they have been repaired near the TIP site but not in their communities.
- With VinFast delaying a year, will the transportation improvements be delayed?
- Provide service from boat ramp such as a small ferry to carry people to island area.
- Traffic lights and safety for increased traffic
- Improve Gum Springs Church Road
- Safe roads for biking in the area
- Rideshares would be a great addition.
- Bike lanes on pea ridge, Old US 1 especially as traffic increases

RECREATION

- Keep access to the lakes.
- The Park is a great idea.
- New Elam Church Road Park
- There is an old rail track along Pittsboro Moncure Road that could be turned into a greenway.
- Improvements to boat ramp area near Cape Fear Area, such as beautification (landscaping)
- Have a park and recreation place for the kids
- More walking trails
- You could create a park with a community garden for vegetables, fruits and flowers, where volunteers can benefit from sharing in the produce.
- Better maintenance of the natural areas/parks in Moncure such as Jordan dam trails and Justice lands(near Moncure Health Center) to draw more users from surrounding areas.
- Parks Playgrounds Shops
- Solar-lit trails for hiking

VILLAGE

- Original town center with increase in small businesses
- Keep the central area of Moncure, from Post Office area to the Poe's Ridge Boat Ramps
- Small village created with community feedback
- It would be nice to see the development of a walkable town center with nice restaurants serving locally grown food, and some retail owned and operated by local residents.
- Small downtown with shops, dining, and services similar to that in Holly Springs or Apex.
- Thriving town with small town character.

SHOPPING / SERVICES

- Retail Stores, Grocery Stores/Farmers Market
- Schools and Daycare are a primary need.
- Bring in a gas station with a fast food restaurant, drug store or Walmart
- Planned commercial development
- Restaurant would be great
- Aldi or lidl grocery store along old us 1
- Add quality grocery store, gas station, and pharmacy.
- We need a grocery store
- More food/grocery options (locally owned)
- Businesses could spring up around small business encouraged to support rural and farming pursuits. THAT would make us unique.

PREFERRED DEVELOPMENT FEATURES

- Preservation of a lot of existing vegetation
- Good architectural design
- Building construction that lasts for decades
- Walkable development

COMMUNITY FACILITIES

- Larger school with public access to sports fields/tennis courts/ etc.

UTILITIES

- No sewer beyond Corinth.
- Public water supply
- Public utilities and trash pick up company
- It is extremely disappointing that the county only plans to extend water, sewer, and broadband services directly to specific new manufacturing sites, bypassing current residents and also limiting potential development of more desirable features in our community such as small businesses on smaller plots of land, apartments, or other affordable housing

BROADBAND

- High Speed Internet doesn't go past Corinth. Needs expanded.
- It would be nice if we had reliable fast internet.
- Increased internet options
- Need high speed internet
- Retain rural character while bringing in modern services like high-speed internet
- True high-speed internet for ALL residents, not just the new developments
- Internet!!!

“Respect for the people and the natural resources of the area are very important. Help for people who have been here for generations should be available. Taking their land should not happen.”

-- Survey response



INDUSTRY / JOBS

- Save Agriculture areas in all Moncure.
- Preserve Forestry
- The MEGASITE has destroyed the Moncure we knew and loved all of our lives

AGING IN PLACE

- Elderly people who cant attend and not represented, living off social security and can barely afford things now it will only get worse for them. Any assistance/programs for elderly?
- Just purchased private property to live the rest of their lives here, don't take it
- Senior center

TAXES / PROPERTY VALUE

- Taxes from the folks in Moncure should be going towards services in Moncure.
- Moncure Flatwood Road-owns small family business, family land. What effects with this development have on tax value?
- If all these expensive houses are going to come in and push us (locals) out – please set up a special tax base. I want to be able to stay in my childhood home all my life and not be thrown out into the street

Inspiration Collage

Help us get a clearer picture of your expectations and aspirations for the future. Tell us about the places you have seen and visited that you believe might be good examples for the Moncure area to follow. With your help, we will look them up and print and image that shows the features you appreciate. We will post them here and create a collage that will help us develop the appropriate direction for Plan Moncure.



USES TO CONSIDER:

- Retail (Gen. Merch.)
- Grocery
- Pharmacy
- Farmers Market
- Food & Beverage
- Parks
- Schools
- Daycare
- Housing
- Churches
- Agriculture, Forestry

At one station at the Community Open House, attendees shared thoughts about the kinds of places they thought would be positive additions to consider in future development in the Moncure area. Pictured above are images of the places suggested, which include retail (grocery store, general merchandise store), food and beverage service (coffee shops, fast casual restaurants, sit-down restaurants), parks (community parks, playgrounds, dog parks), housing, and churches.

Surveys

About the Surveys

Three surveys were created as a way of offering an additional or alternative means of participating in the community meetings. The questions were constructed to generally repeat the questions posed at the meetings as the project team sought input to the information presented.

Survey Results

Over 300 people responded to the surveys offered online and in paper format. The following provides highlights of the results of the first survey, which was intended to solicit stakeholders' thoughts about issues, opportunities, and ideas for the future. It also describes the characteristics of the respondents. **For complete documentation of the survey results, refer to the survey reports on file with the Chatham County Planning Department.**

The first survey, which was available as hard copies at the Community Open House as well as online via a link was posted on the project webpage.

Of those who responded, ____% were residents and ____% are property owners. About 75% have lived in the area for more than 10 years, and nearly half have lived in the area for 20+ years. Most respondents (____%) are in the ____ age group.

Generally, the survey results revealed preferences for specific types of land uses. The results also indicated strong support for conservation of natural and cultural assets. Figures 1, 2, and 3 display the results of three key questions.

Q6 What do you like about Moncure? (Rank the top three)

Answered: 42 Skipped: 2

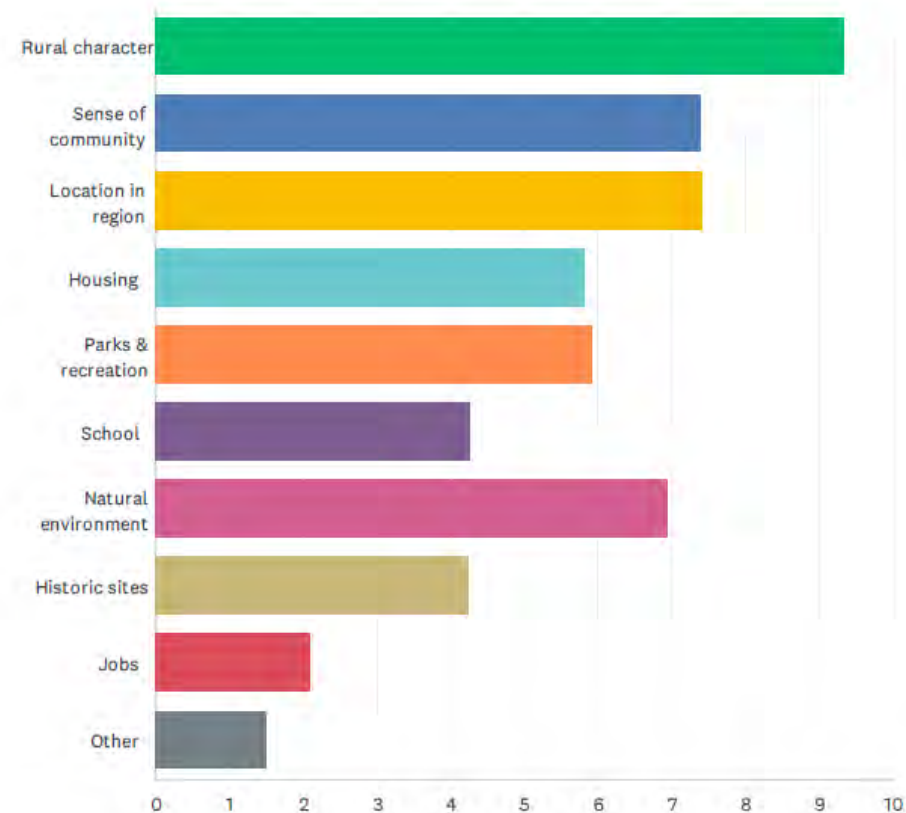


Figure 1. Survey Question Results – Q6

Respondents were asked to rank the top 3 things they like about the Moncure area.

Q7 Which of the following issues do you think apply to Moncure? (Rank all that apply with #1 being the most important to you.)

Answered: 42 Skipped: 2

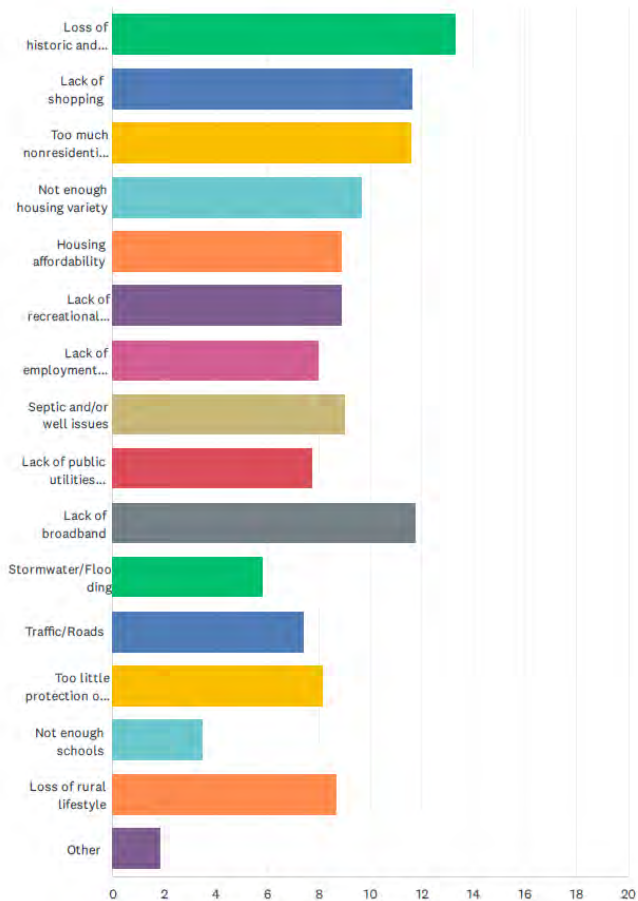


Figure 2. Survey Question Results – Q7

Respondents were asked to identify the top issues that apply the Moncure area.

Q9 In the future, what types of uses should the County encourage? (Check all that apply)

Answered: 44 Skipped: 0

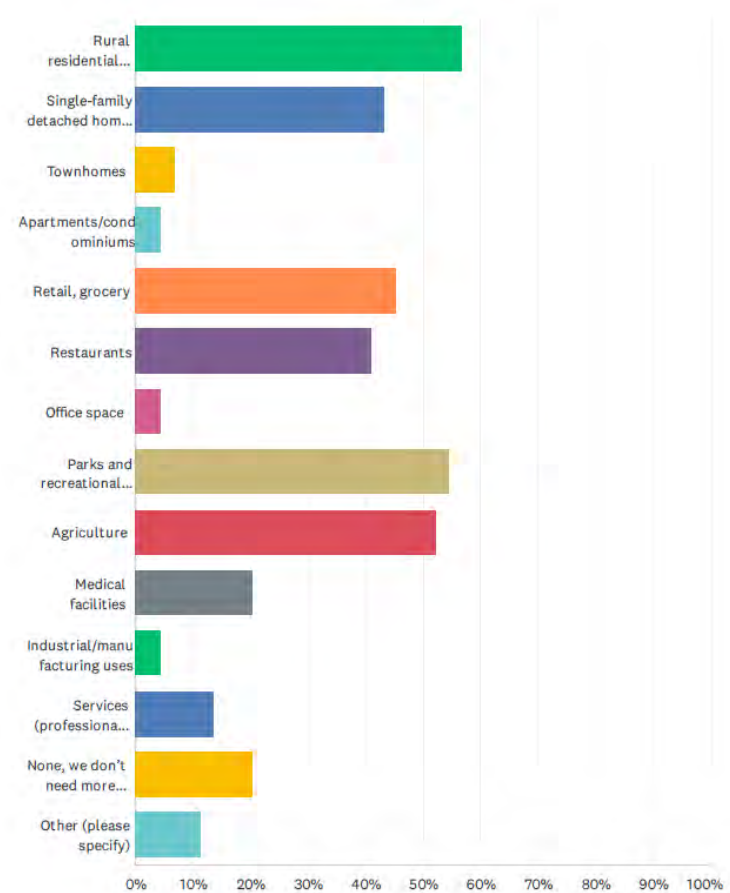


Figure 3. Survey Question Results – Q9

Respondents were asked to name land uses that would be appropriate for the Moncure area in the future.

The input received through the surveys addressed a wide variety of topics. Opinions about future development and conservation varied widely. However, there was agreement around protecting the rural character of the area while accommodating some amount of commercial development that is already attracted to the area, particularly community-serving uses like a grocery stores, pharmacies, and services. Community members recognized the growing interest in housing development and the need for affordable options, especially those that will meet demand created by the aging population in Moncure today as well as those moving to the area for the new jobs emerging. Conservation of cultural and natural assets as well as open space was identified as a key objective, and the community indicated interest in conservation achieved through land protection mechanisms along with limiting areas of change.

The information displayed on these pages are excerpts from the first survey results, communicating generally what the residents would like to keep as change occurs and features or circumstances the community would like to change.

WANT TO KEEP

- Rural character, charm
- Country lifestyle
- Sense of community, friendships, brotherhood, family
- History, heritage, historic buildings
- Nature
- Wildlife, and their habitats
- Quiet
- Churches
- Farms /agriculture
- Woods, trees, and fields
- Small businesses
- Large-lot neighborhoods

A word cloud of survey responses for 'WANT TO KEEP'. The words are in various shades of blue and green. The most prominent word is 'Rural'. Other words include 'community', 'Small town', 'Keep', 'areas', 'homes', 'live', 'life', 'feel', 'larger', 'low', 'Moncure', 'Small', 'closer', 'retail', 'land', 'property', 'Rural character', 'Trees', 'want', and 'live'.

WANT TO CHANGE

- Public utilities
- Broadband, high-speed internet
- Grocery, pharmacy (add)
- Planned development (more)
- # of RV parks – too many
- Amount of industrial – too much
- Traffic
- Lack of protection
- Eminent domain (no longer possible)
- Road maintenance (trash, potholes)
- Property maintenance (buildings, landscaping, junk cars)

residents family change leaves RV parks

development Addhousing

services **Moncure** Needs

lack **Better** land park planning
see

grocery store

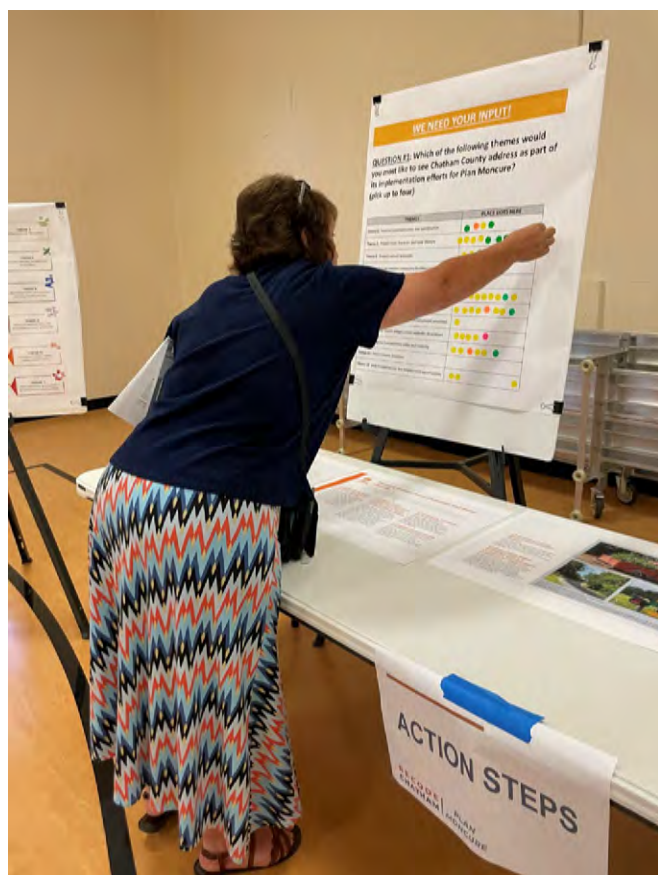
high speed internet



Input on Implementation

Public Input Received on Implementation Themes

Question: Which of the following themes would you most like to see Chatham County address as part of its implementation efforts for Plan Moncure? (Pick up to 4) (Note: Survey data as of 8/15/23)

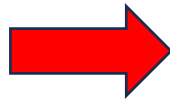


PLAN MONCURE IMPLEMENTATION THEMES	VOTES AT MEETING	VOTES IN SURVEY	TOTAL
Theme 1: Improve communication and coordination	4	2	6
Theme 2: Protect rural character and rural lifestyle	14	11	25
Theme 3: Protect natural resources	12	12	24
Theme 4: Provide needed community facilities and services	3	5	8
Theme 5: Provide needed recreational amenities	6	3	9
Theme 6: Add important community-serving infrastructure	9	5	14
Theme 7: Maintain affordability	13	3	16
Theme 8: Support desired land uses and development amenities	1	2	3
Theme 9: Enhance historic villages, create walkable downtown	5	0	5
Theme 10: Improve transportation safety and mobility	7	3	10
Theme 11: Protect historic resources	1	5	6
Theme 12: Help residents access new employment opportunities	3	1	4

Public Input on Specific Short-Term Projects

Question: Which of the following Short-Term Implementation Projects would you like to see Chatham County prioritize for action? (Note: Survey data as of 8/15/23)

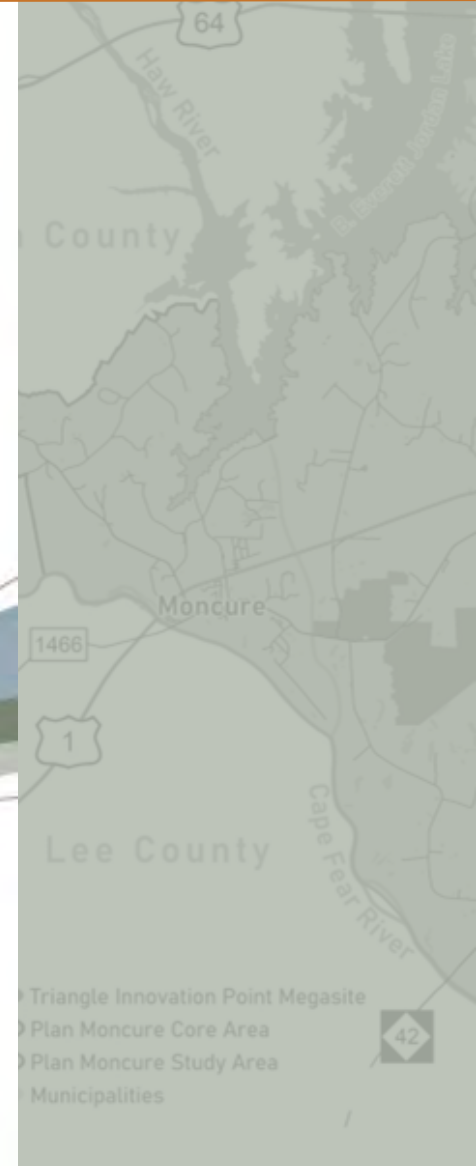
Top Ten Projects



PLAN MONCURE SHORT-TERM IMPLEMENTATION MEASURES	VOTES AT MEETING	VOTES IN SURVEY	TOTAL
Project 6.1 – Continue Working to Partner with Internet Service Providers to Provide Affordable Broadband Service, within Resources and Authority Available	20	8	28
Project 2.2 – Update Unified Development Ordinance to Implement Plan Moncure Zoning Strategy to Protect Rural Character and Lifestyle	16	7	23
Project 8.1 – Work with Property Owners and/or Retailers and Restaurants to Consider Locating Stores in Moncure Area	13	9	22
Project 5.1 – Build Parkers Ridge Park	10	9	19
Project 6.2 – Collaborate with Partners to Identify Wastewater Service Needs and Feasibility	13	4	17
Project 9.1 – Evaluate Zoning Designations in Historic Villages such as Historic Moncure as Part of UDO to Help Facilitate Appropriate Infill	5	9	14
Project 12.1 – Continue Working with CCCC on Job Skills Development Partnership to Help Train Local Residents	5	8	13
Project 5.2 – Work to Develop New Walking, Hiking, and Biking Trails	9	2	11
Project 10.2 – Continue to Facilitate Communication Between Residents and NCDOT Regarding Transportation Concerns	5	6	11
Project 2.6 – Allow Home-Based Businesses That Are Compatible with Rural Landscape on Large Lots	8	1	9

SCENARIO PLANNING SUMMARY

08.09.2023



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Place Types	4
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Vision Map (Preferred Scenario)	20

Introduction

The primary objective of the plan development stage was to determine the appropriate land use and conservation pattern and depict that in the “Future Land Use & Conservation Map” Through the process, the community expressed ideas for change that could enhance the quality of life in Moncure. These ideas were tempered with comments about conserving the features that define the Moncure area and the way of life that residents have enjoyed for decades. Arriving at a shared vision for the future required an examination of multiple options so the community could evaluate trade-offs and determine the best path forward.

Places of Potential Change

An important question to answer in developing the vision for the future is, “Where can all the growth (i.e., new homes, new businesses, and additional support services) that is coming to the area be located?” Therefore, an early step in the process is mapping the development status to determine which parcels make up the “land supply,” or the places where growth may go.

The study area is comprised of 67,356 acres. Some of that land (12%) is already developed and not likely to redevelop. Another 29% is protected through conservation easements and other land protection mechanisms. The remaining land is either undeveloped or underdeveloped. The land supply is comprised of these two areas, which combined encompass 35,907 acres.

Using the Land Supply Map

The Development Status Map maps the distribution of these categories of development status. The status of parcels in the study area can

UNDEVELOPED

With few or no structures, parcels of land remain vacant or relatively undeveloped. (Note: These parcels include agricultural lands that are managed for timber, cultivated fields, and pastureland.)

PROTECTED

Parcels of land are protected as public parkland, privately-owned conservation easements, etc. (Refer to the Managed Land on the Study Area Map.)

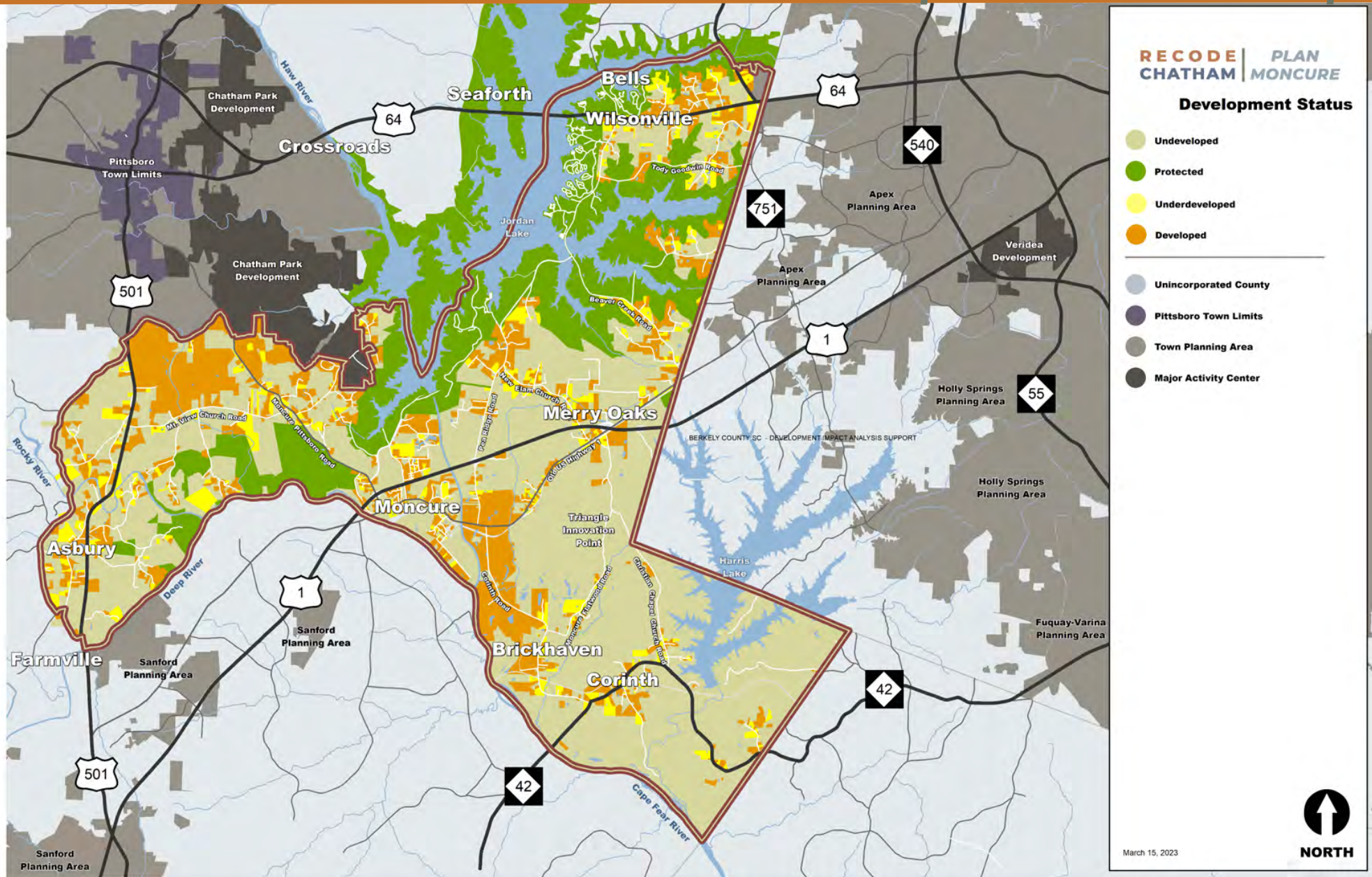
UNDERDEVELOPED

The level of investment is low and the property is therefore ripe for redevelopment.

DEVELOPED

The level of investment is high and such parcels are not likely to redevelop over the next 20 years.

Development Status Map



Place Types

WHAT ARE THEY?

Place Types are classifications of development and conservation. The use of such classifications instead of land use categories is a modernized approach to describing existing and future development and distinguishing each area from others. In addition to land use, each place type can be described in terms of scale and density of development (lot sizes, building heights, and building setbacks). Street types, connectivity, and resulting block patterns are sometimes noted to describe the circulation networks for various modes of transportation to be supported in each area. Since open space is a key component of any development pattern, the appropriate amount as well as the variety of types defined by purpose, size, typical location, and level of improvement (a formal green versus a natural area) may also be specified.

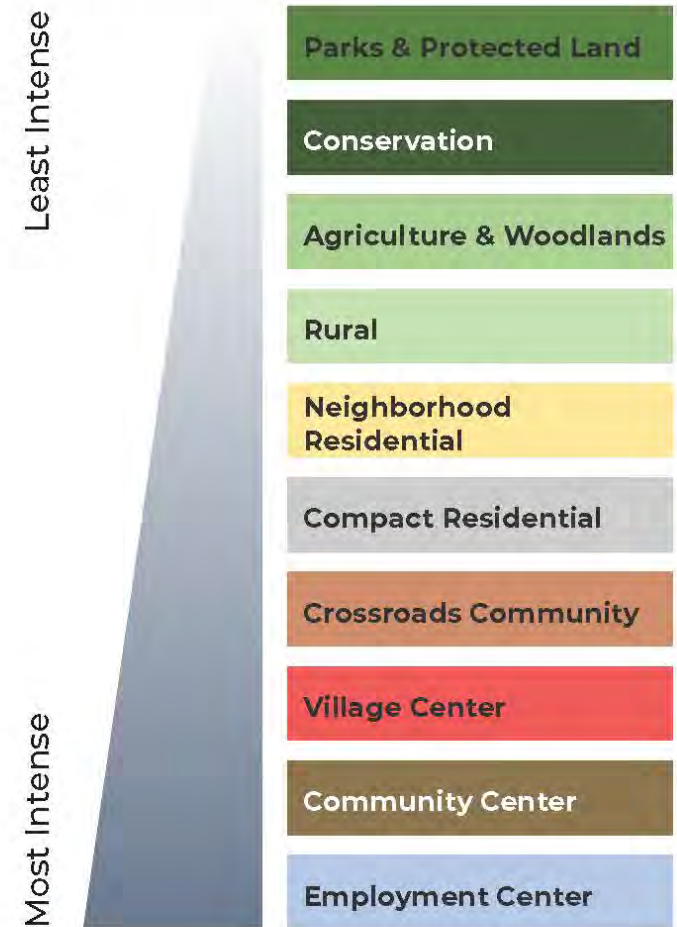
PLACE TYPES VS. ZONING DISTRICTS

Place Types and Zoning Districts are not the same. In fact, more than one zoning district could be appropriate for area designated for a single place type. Refer to the Zoning Strategy presented in Section VI.

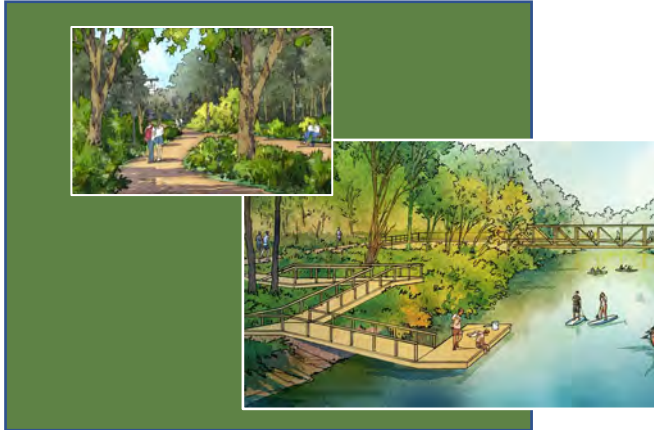
DID YOU KNOW?

A common point of confusion is the difference between a land use map and a zoning map. The distinction is an important one. To be clear, land use plans, such as *Plan Moncure*, are policy guides. They do not have the force of law. Plans establish a vision for the future that is reflective of community expectations. The "vision" is represented by a land use map that shows the future development pattern. Plans are implemented through a variety of tools. One of those tools is the zoning ordinance, which does have the force of law. Zoning puts into place the rules to be followed as property is developed or redeveloped. Such rules should be consistent with the intent of the adopted plan. The official zoning map depicts the zoning districts to delineate the areas where the rules apply.

The range of Place Types generally increase in intensity. The diagram below shows the relative differences across the Place Types shown on the Vision Map and explained in this pages that follow.



Parks & Protected Lands



Permanently protected lands, these areas are composed of federal- and state-maintained recreation areas parkland, as well as privately owned land protected by conservation easements. The mix of uses includes passive and active recreation uses, accessory uses, and limited residential uses (per easement agreements).

Conservation



Areas with concentrations of natural assets. (Note: They were delineated previously through a GIS-based analysis that utilized data from the Chatham County Comprehensive Conservation Plan and the North Carolina Conservation Planning Tool.)

Agriculture and Woodlands



The location of large-scale working farms and timberlands, this area is comprised of intensive, highly productive operations. The mix of uses includes large-scale agriculture, related processing facilities, supporting commercial and service uses, and single-family homes associated with the farms (housing the owners and managers of the agricultural operations).

Rural



Low density development comprised of single-family homes on large lots or in conservation subdivisions as well as some commercial buildings designed to protect function and form of rural character. Pastures, farms, and forests dominate the landscape. The mix of uses includes agriculture, large lot residential, supporting service uses, and home-based & small-scale businesses.

Neighborhood Residential*



Detached residential units complemented by a variety of open spaces that are connected to the larger system of green space in the area. Neighborhood amenities, recreational facilities, schools, and churches may be part of the fabric. Here, the average lot size is one to two acres.

*

Note: This new place type was designated in response to community feedback received. The Neighborhood Residential place type addresses the desire for an intermediate category, suggesting more density than Rural but not as dense as Compact Residential.

Compact Residential



Detached residential units complemented by a variety of open spaces that offset the smaller sizes of private yards. Community centers, amenities, recreational uses, schools, and churches may be part of the fabric. Here, the average lot size is smaller than that of other residential place types. Proximity to the historic heart of Moncure or new centers places residents of neighborhoods in this place type within a reasonable walking or biking distance of local shops and dining.

Crossroads Community



These communities are within rural areas. The mix of uses includes agriculture support services, limited supporting retail, and some single-family residential and institutional uses. Residential uses are designed in a context-sensitive manner in keeping with historic development patterns, which may include smaller lot sizes and setbacks than typical rural and suburban development.

Community Center



Retail hubs located along key roadway corridors, these centers accommodate regional retail tenants complemented by local-serving commercial development. The mix of uses includes retail, restaurants, services, and office uses. Residential uses can include single family homes, patio/cottage homes, attached units, and multifamily units.

Village Center



These historic centers accommodate small-scale, local-serving uses, including retail, restaurants, services, and office uses clustered at the center and flanked by residential uses. New buildings are context-sensitive in keeping with historic development patterns. Attached products may be appropriate if designed to mimic the scale and features of single-family homes in the area. Light Industrial uses designed to have minimal impact on surrounding residential are also appropriate.

Employment Center

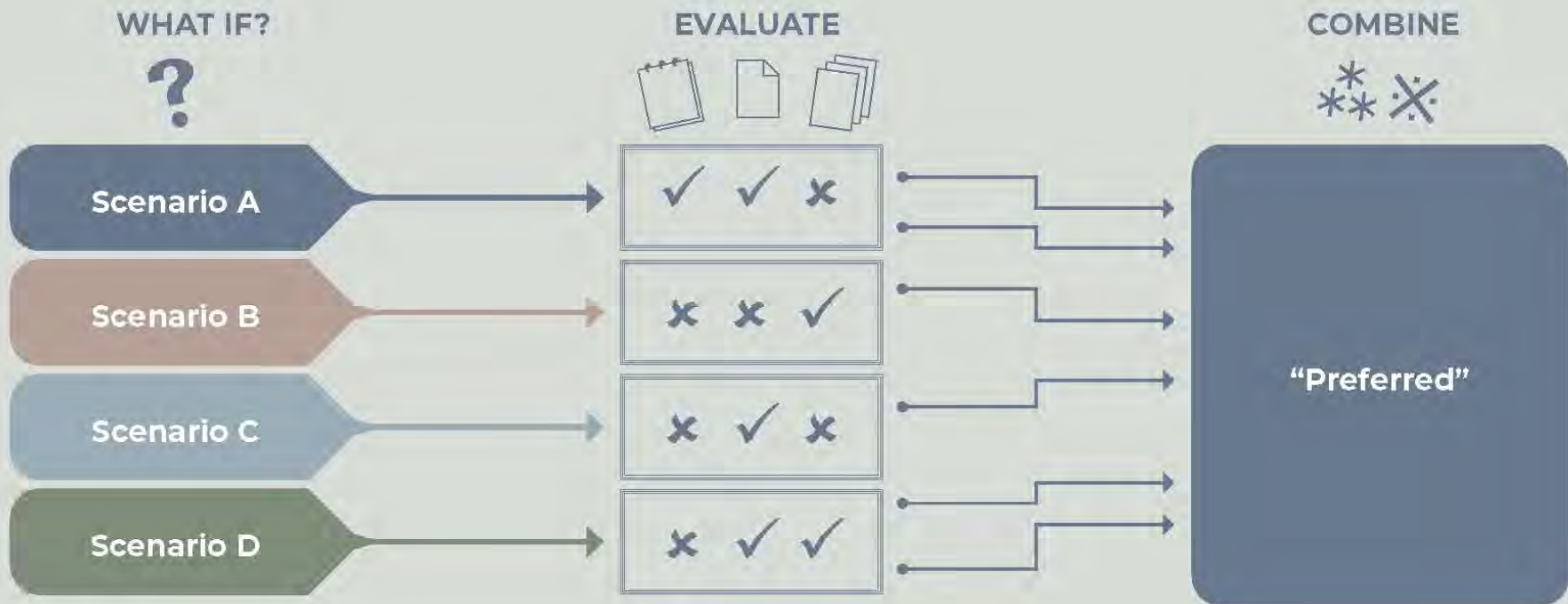


These centers are targeted for future job-generating uses in settings that meet today's workplace expectations. The mix of uses includes industrial, office, and supporting retail, restaurant, service, recreation, and other uses.

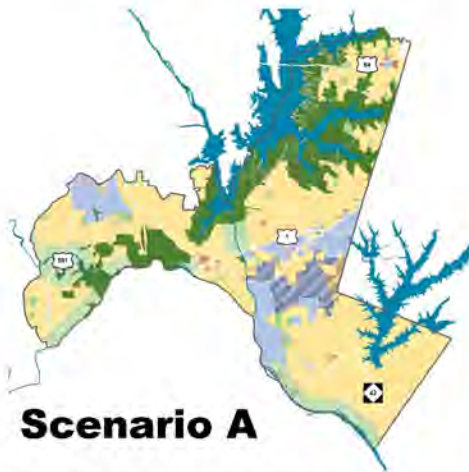
Scenario Planning

The project team employed a technique referred to as “Scenario Planning” to present options for the future of Moncure. Scenario planning is a process that considers multiple possibilities for future development and conservation for a given area based on a variety of factors. Scenarios are based on community desires and describe what might occur, taking into consideration physical features, environmental constraints, infrastructure investments, market realities, emerging trends and opportunities, and other factors. Scenarios contemplated are not forecasts or predictions. They enable the community to make informed choices. The essential requirement for any scenario is that it be plausible, within the realm of what exists today, or what could be in the future.

Figure X. Scenario-Planning-in-Concept Diagram



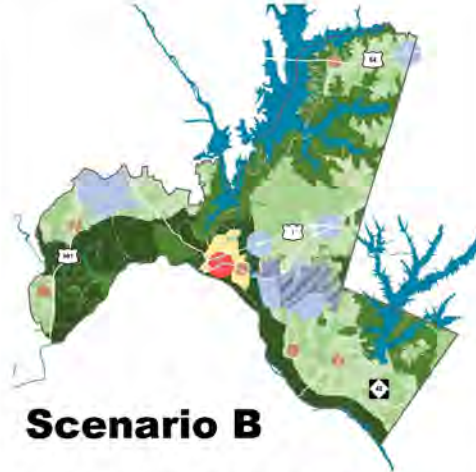
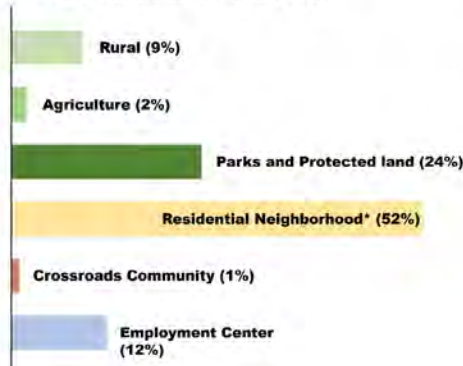
Side-by-Side Scenario Comparison: Plan Framework Maps



This scenario illustrates an option for future development that is based on current zoning. In other words, some property owners in the Study Area exercise current development rights, choosing to develop their parcels based on the zoning, which is more intense than what is being built now in the Study Area. Development of land conforms to the local land development regulations that are in place today. Options for development vary widely in terms of location. However, the types of development are limited to the uses and densities permitted under current zoning. Some, not all, of the projected growth would occur in other locations in Chatham County or in neighboring jurisdictions (i.e., Wake County, Apex, Holly Springs, Lee County, Sanford). This means most residents would need to commute out of the area to meet their daily needs (work, groceries, etc.). Private open space is more common than publicly managed open space. The extent of land in agriculture decreases as land converts to other uses and over time is no longer a significant component of the development pattern.

Notes:

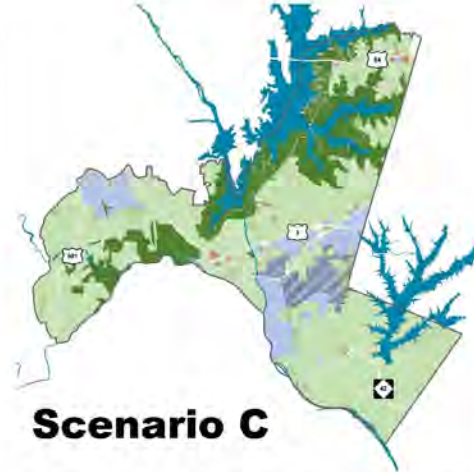
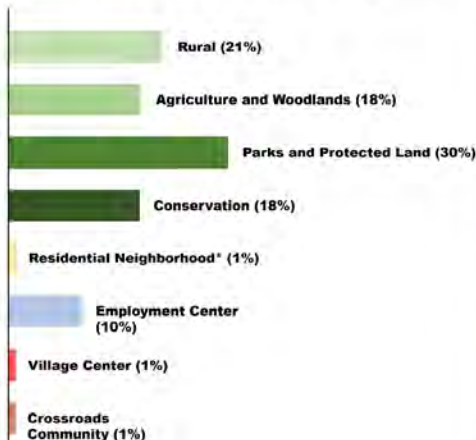
- The scenario assumes current watershed regulations in the UDO (i.e., 12% and 36% impervious surface requirements).
- The scenario includes committed development and adds to it development forecasted to occur in the Study Area by the year 2040.
- The scenario, as constructed, was unable to accommodate the full growth forecast for the Study Area.



This scenario depicts the development pattern that would result from the implementation of Plan Chatham (adopted in 2017). An expanded range of possible uses provides more options for development than Scenario A, although fewer new homes overall, including commercial uses that can be concentrated in nodes for more viable business locations. The places where development would be encouraged are few but, like Scenario A, include areas for future employment. Some, not all, of the projected growth would occur in other locations in Chatham County or in neighboring jurisdictions (i.e., Wake County, Apex, Holly Springs, Lee County, Sanford). The limitations on locations for future development allow for more effective protection and management of existing open space, which could conserve more natural resources than Scenario A. Opportunities for recreational open space increase and agricultural activities are supported.

Notes:

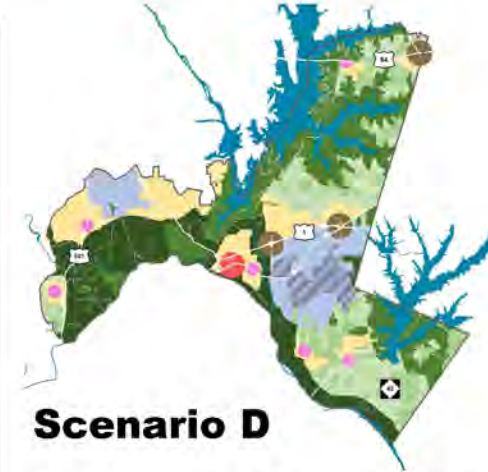
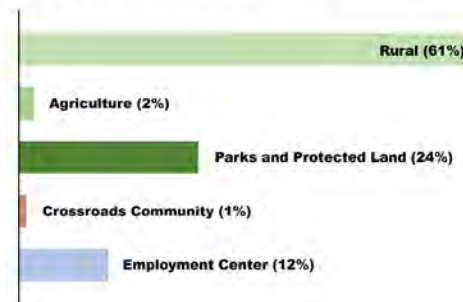
- The scenario assumes new watershed regulations for the UDO (i.e., 30% set aside for all properties).
- The scenario, as constructed, was unable to accommodate the full growth forecast for the Study Area. (Plan Chatham did not anticipate the type and level of development being considered for the Plan Moncure Small Area Plan.)



This scenario assumes a reduction in potential development, resulting in a predominantly rural pattern of development. The land area where development might occur is much broader than Scenario B, but compared to Scenario A, fewer uses would be permitted. Like the other scenarios, employment uses can be accommodated but commercial uses are likely just those that exist today. The emphasis in this scenario is on less development achieved through lower overall density. This would be due, in part, to developers and property owners deciding not to build up to the maximum allowable densities. Much of the projected growth would occur in other locations in Chatham County or in neighboring jurisdictions (i.e., Wake County, Apex, Holly Springs, Lee County, Sanford). This means most residents would need to commute out of the area to meet their daily needs (work, groceries, etc.). Unlike scenario B, there is a focus on private open space in individual lots. Public open space consists of land already protected and would not be increased through efforts of private, public, and nongovernmental entities. Agriculture decreases as land converts for other uses and eventually is no longer a significant component of the development pattern.

Notes:

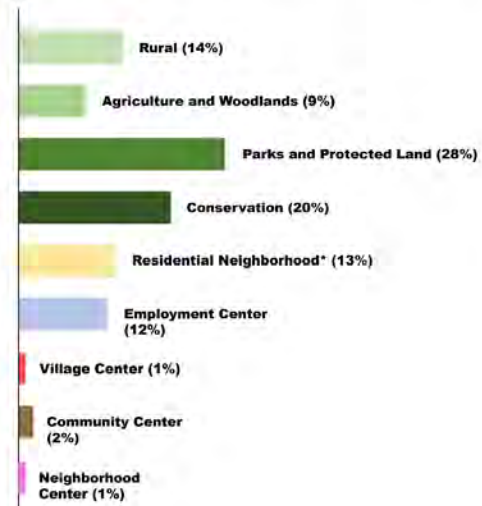
- The scenario assumes current watershed regulations in the UDO (i.e., 12% and 36% impervious surface requirements).
- The scenario, as constructed, was unable to accommodate the full growth forecast for the Study Area.



This scenario assumes a modest amount of new development but at higher levels than any of the other three scenarios. The projected growth would stay in Chatham County rather than being redirected to other places. To accommodate such development, this scenario would include a broader range of land uses, including commercial (retail and office) and employment uses. The distribution of such uses varies based on location, as this scenario also includes options for changes in development intensity. Like Scenario B, the locations are more limited than Scenarios A and C, allowing for the conservation of existing open space.

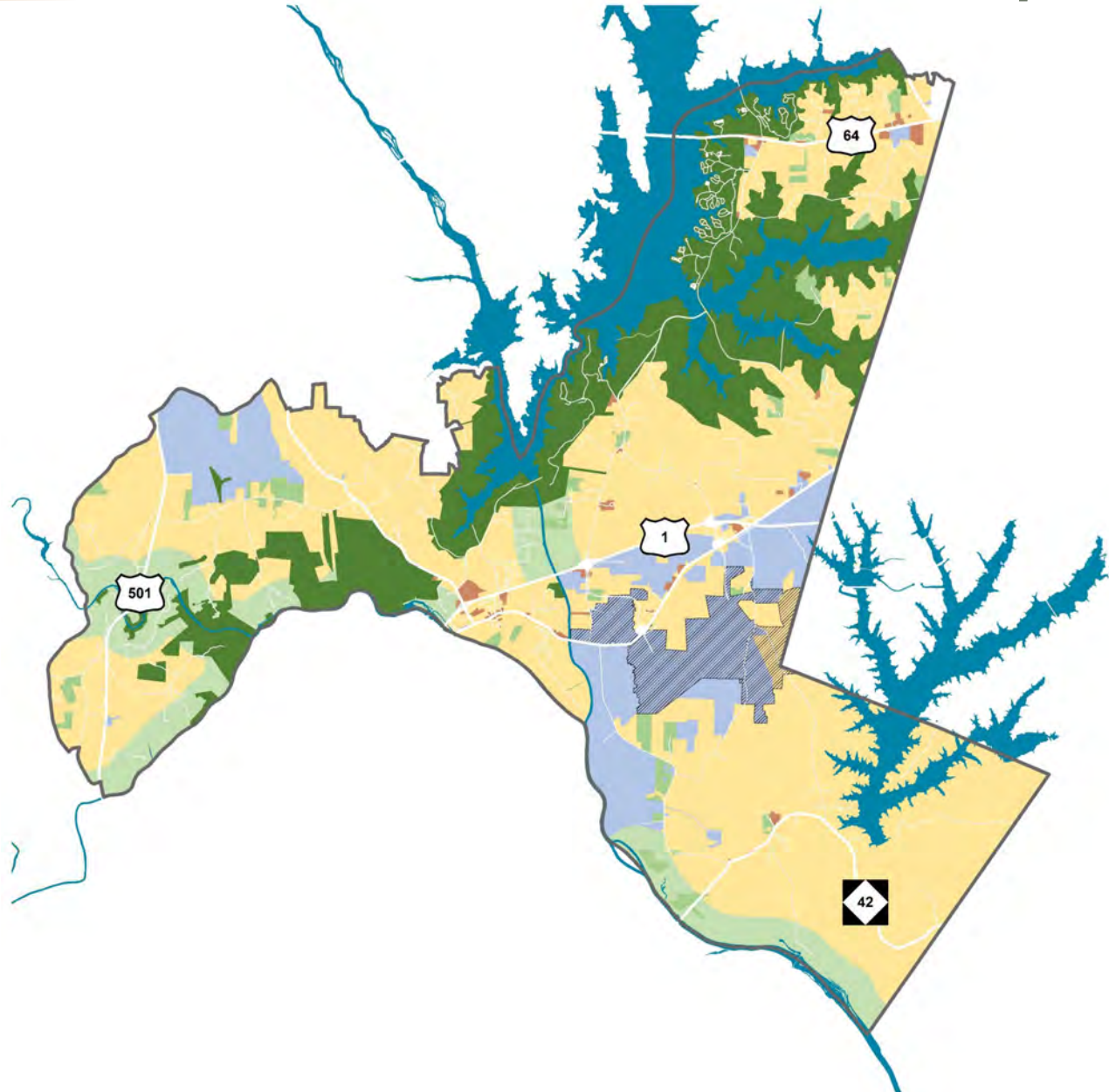
Notes:

- The scenario assumes new watershed regulations for the UDO (i.e., 30% set aside for all properties).
- The scenario, as constructed, is able to accommodate committed development and the full growth forecast for the Study Area.



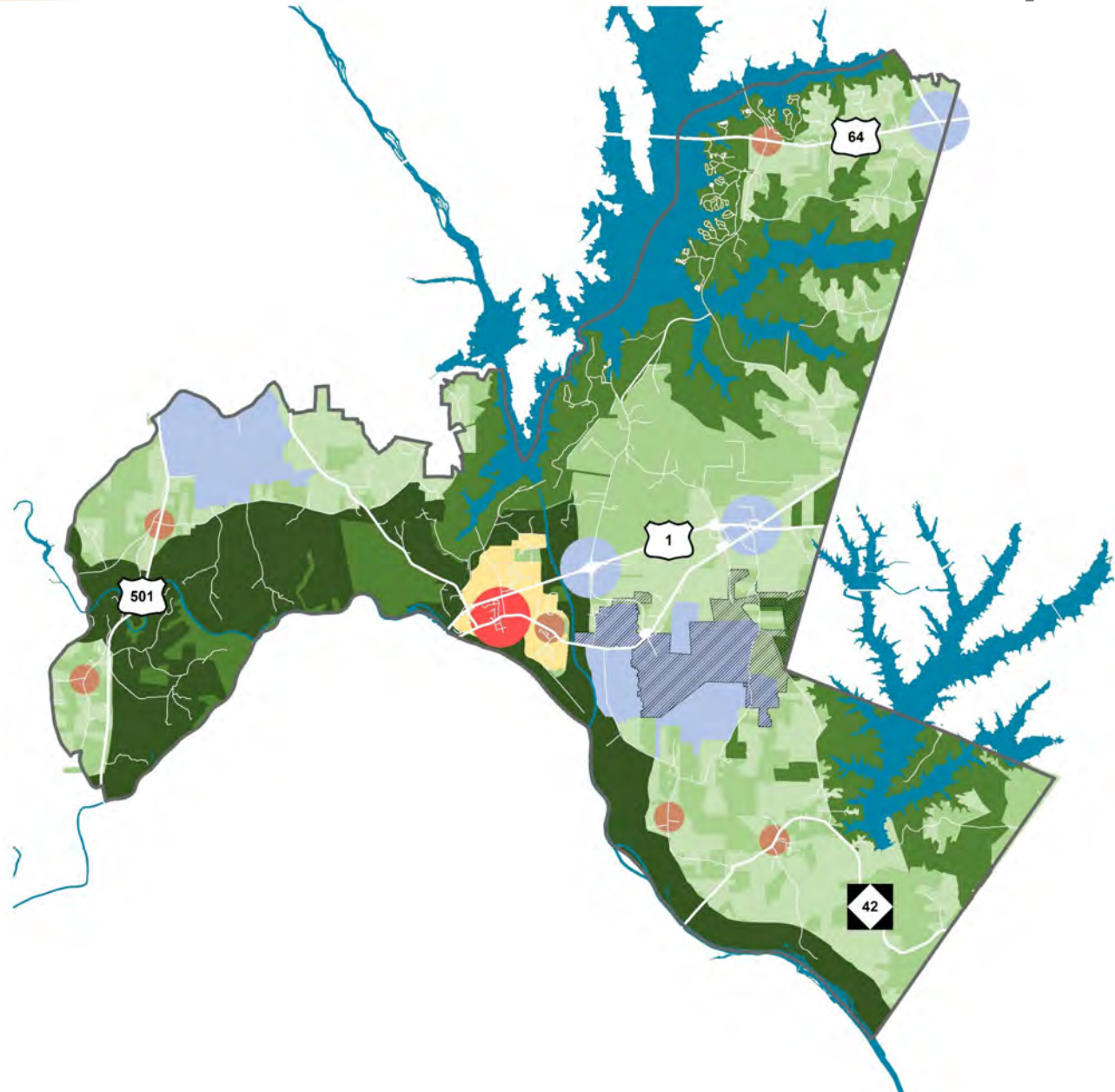
Scenario A Map

This scenario illustrates an option for future development that is based on current zoning. In other words, some property owners in the Study Area exercise current development rights, choosing to develop their parcels based on the zoning, which is more intense than what is being built now in the Study Area. Development of land conforms to the local land development regulations that are in place today. Options for development vary widely in terms of location. However, the types of development are limited to the uses and densities permitted under current zoning. Some, not all, of the projected growth would occur in other locations in Chatham County or in neighboring jurisdictions (i.e., Wake County, Apex, Holly Springs, Lee County, Sanford). This means most residents would need to commute out of the area to meet their daily needs (work, groceries, etc.). Private open space is more common than publicly managed open space. The extent of land in agriculture decreases as land converts to other uses and over time is no longer a significant component of the development pattern.



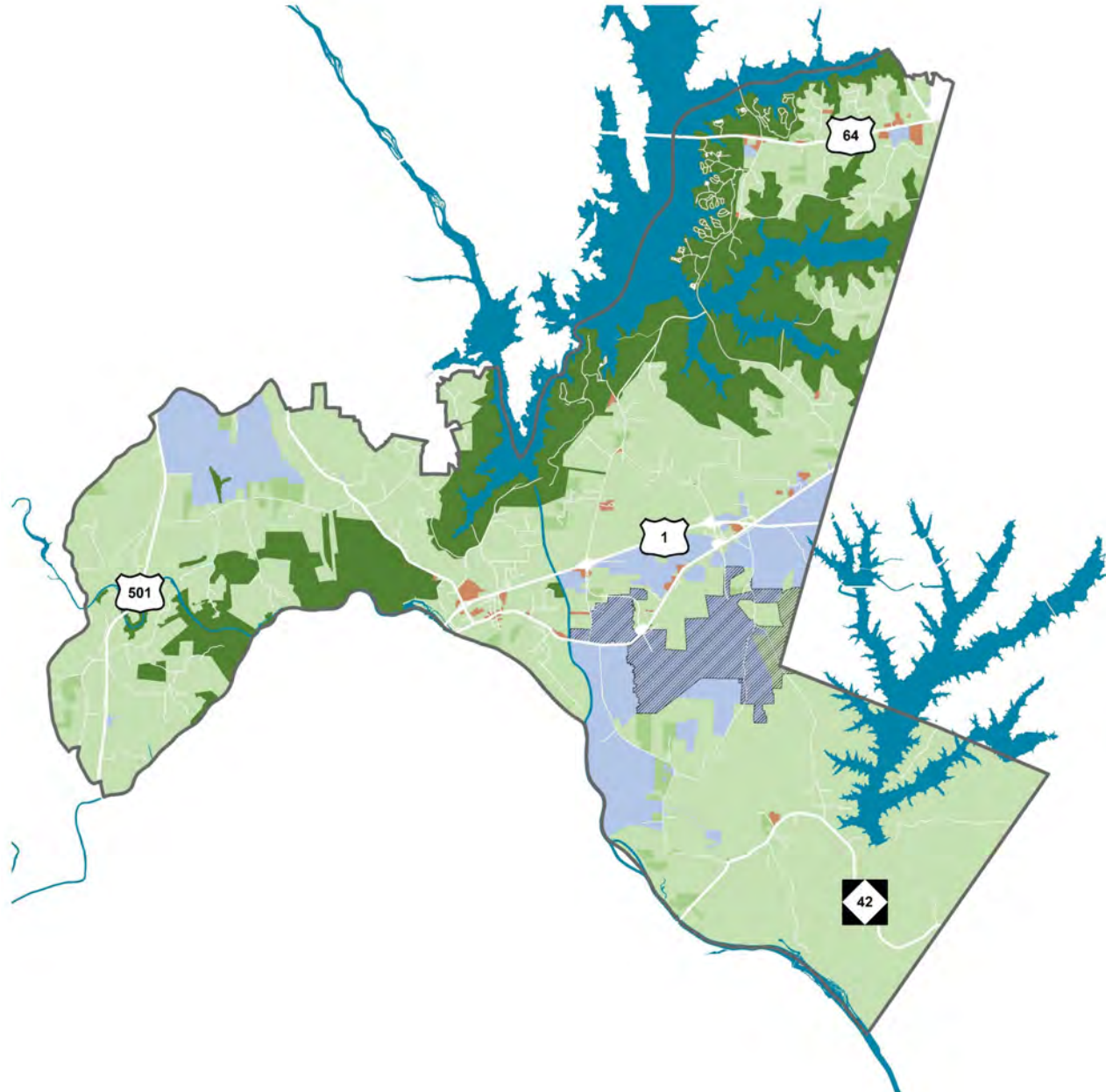
Scenario B Map

This scenario depicts the development pattern that would result from the implementation of Plan Chatham (adopted in 2017). An expanded range of possible uses provides more options for development than Scenario A, although fewer new homes overall, including commercial uses that can be concentrated in nodes for more viable business locations. The places where development would be encouraged are few but, like Scenario A, include areas for future employment. Some, not all, of the projected growth would occur in other locations in Chatham County or in neighboring jurisdictions (i.e., Wake County, Apex, Holly Springs, Lee County, Sanford). The limitations on locations for future development allow for more effective protection and management of existing open space, which could conserve more natural resources than Scenario A. Opportunities for recreational open space increase and agricultural activities are supported.



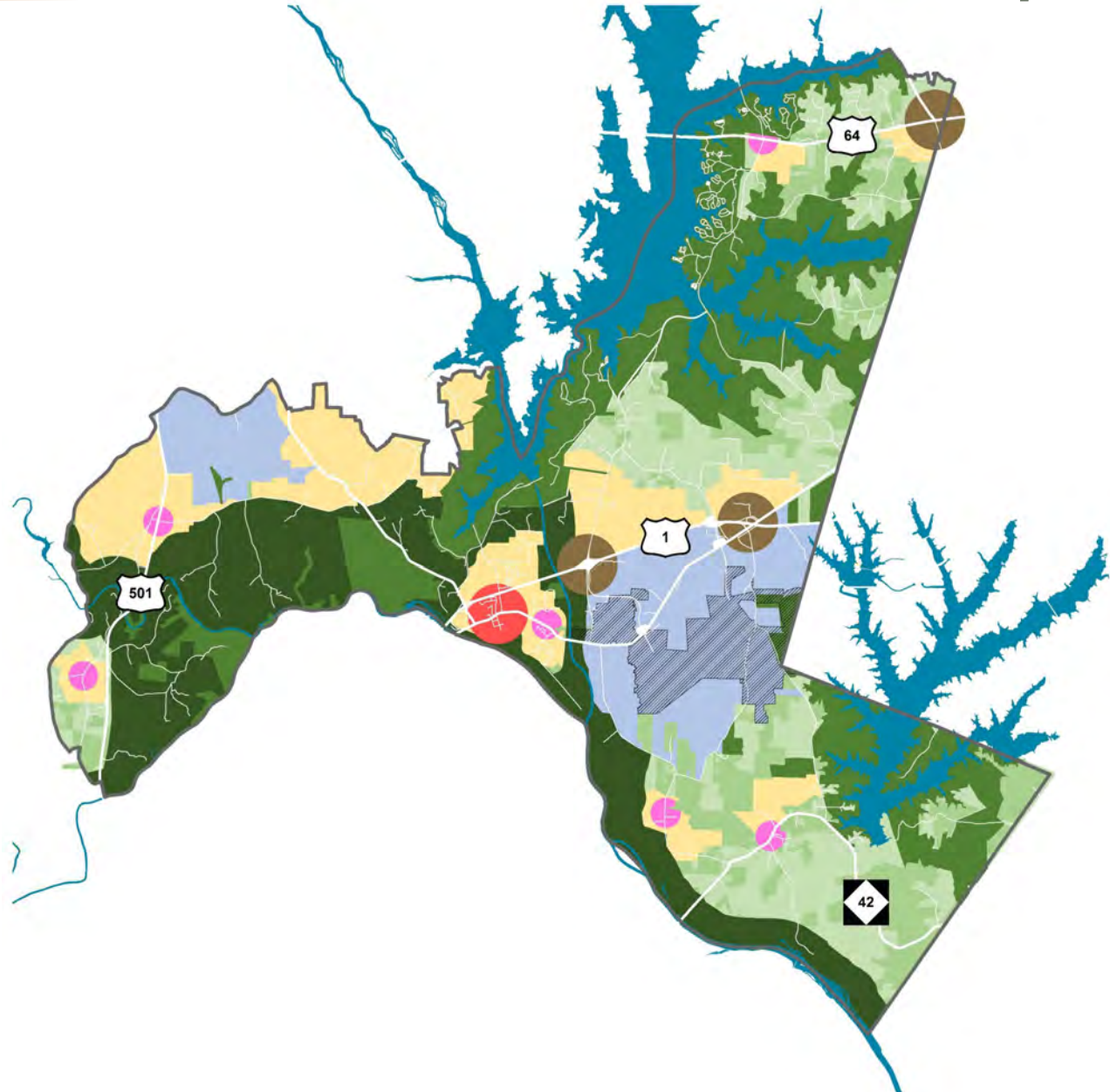
Scenario C Map

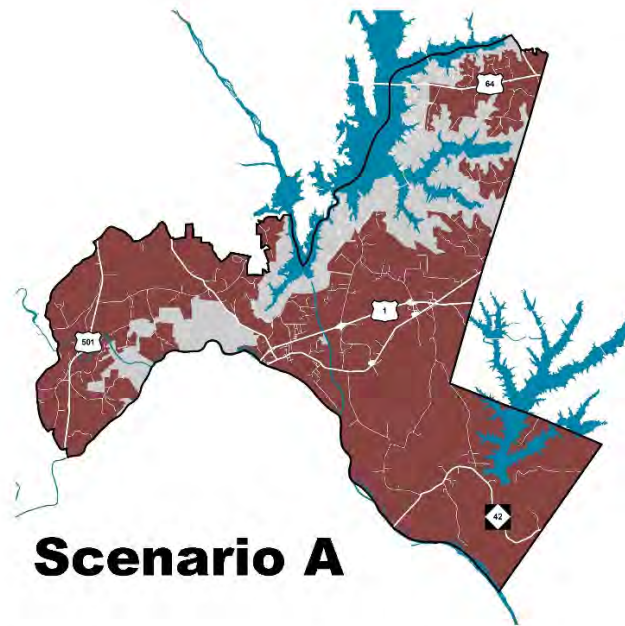
This scenario assumes a reduction in potential development, resulting in a predominantly rural pattern of development. The land area where development might occur is much broader than Scenario B, but compared to Scenario A, fewer uses would be permitted. Like the other scenarios, employment uses can be accommodated but commercial uses are likely just those that exist today. The emphasis in this scenario is on less development achieved through lower overall density. This would be due, in part, to developers and property owners deciding not to build up to the maximum allowable densities. Much of the projected growth would occur in other locations in Chatham County or in neighboring jurisdictions (i.e., Wake County, Apex, Holly Springs, Lee County, Sanford). This means most residents would need to commute out of the area to meet their daily needs (work, groceries, etc.). Unlike scenario B, there is a focus on private open space in individual lots. Public open space consists of land already protected and would not be increased through efforts of private, public, and nongovernmental entities. Agriculture decreases as land converts for other uses and eventually is no longer a significant component of the development pattern.



Scenario D Map

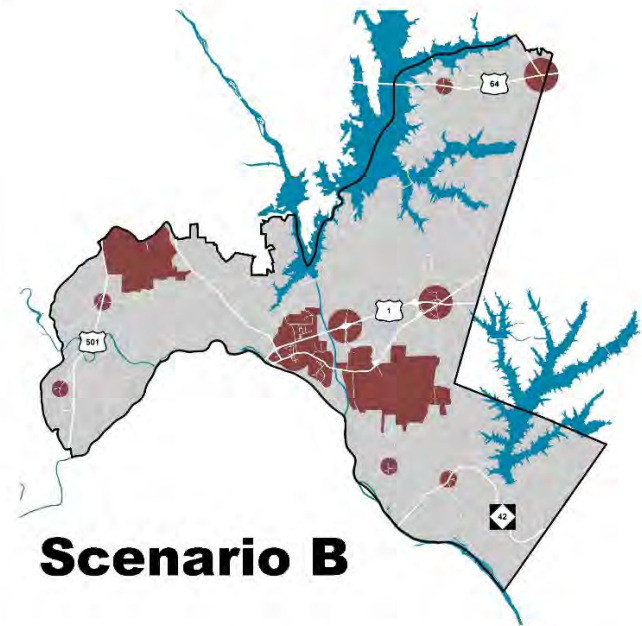
This scenario assumes a modest amount of new development but at higher levels than any of the other three scenarios. The projected growth would stay in Chatham County rather than being redirected to other places. To accommodate such development, this scenario would include a broader range of land uses, including commercial (retail and office) and employment uses. The distribution of such uses varies based on location, as this scenario also includes options for changes in development intensity. Like Scenario B, the locations are more limited than Scenarios A and C, allowing for the conservation of existing open space.





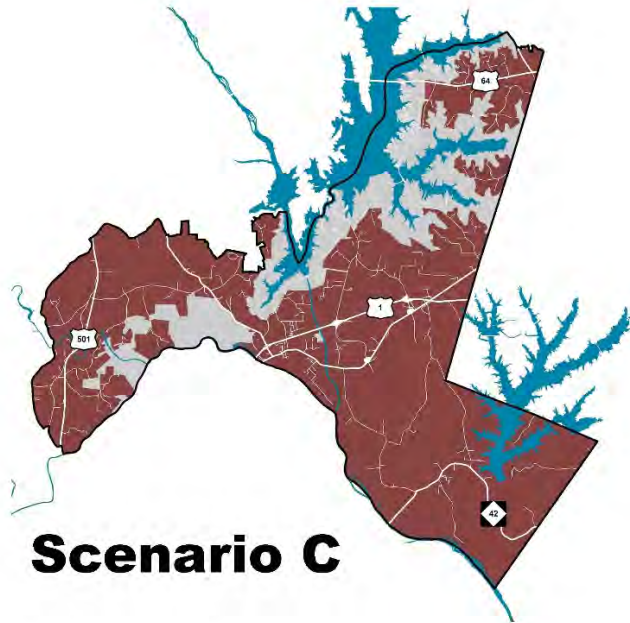
An "intended growth area" was delineated in CommunityViz for each scenario, which tested one or more priority growth areas for the Moncure planning area. Future development would be focused in areas identified in dark red on the map using rules, policies, or requirements adopted by Chatham County in the Plan Moncure Small Area Plan and/or the Chatham County Unified Development Ordinance. Large-scale or intense development would be discouraged in areas identified as grey on the map using other rules, policies, and requirements in the small area plan or unified development ordinance.

For Scenario A, all land outside of parks and permanently protected areas (indicated in dark red on the map) could develop in the future following strictly the official Chatham County Zoning Map and its associated rules, policies, and requirements. The large footprint of the intended growth area recognizes the fact that the county's unified development ordinance does not prioritize development in one or more portions of the planning area.



An "intended growth area" was delineated in CommunityViz for each scenario, which tested one or more priority growth areas for the Moncure planning area. Future development would be focused in areas identified in dark red on the map using rules, policies, or requirements adopted by Chatham County in the Plan Moncure Small Area Plan and/or the Chatham County Unified Development Ordinance. Large-scale or intense development would be discouraged in areas identified as grey on the map using other rules, policies, and requirements in the small area plan or unified development ordinance.

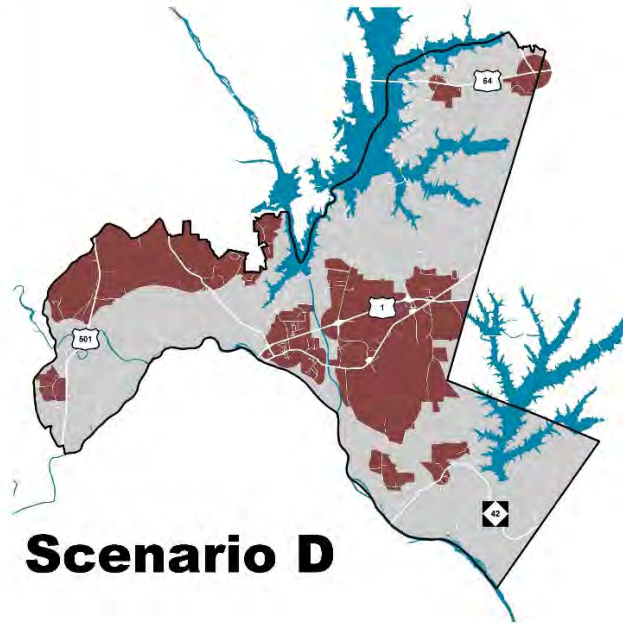
For Scenario B, all of the land inside a village center, community crossroads, employment center, or residential neighborhood place type area (indicated in dark red on the map) could develop in the future strictly following the vision and principles of the Plan Chatham Comprehensive Plan. The comprehensive plan includes preferences for development types, locations, and intensities in these locations as described in the document. Areas in grey on the map would predominately be reserved for open space or for low-scale, low-intensity development described in the rural place type category.



Scenario C

An “intended growth area” was delineated in CommunityViz for each scenario, which tested one or more priority growth areas for the Moncure planning area. Future development would be focused in areas identified in dark red on the map using rules, policies, or requirements adopted by Chatham County in the Plan Moncure Small Area Plan and/or the Chatham County Unified Development Ordinance. Large-scale or intense development would be discouraged in areas identified as grey on the map using other rules, policies, and requirements in the small area plan or unified development ordinance.

For Scenario C, all land outside of parks and permanently protected areas (indicated in dark red on the map) could develop in the future. However, unlike Scenario A, these areas would predominately be reserved for low-scale, low-intensity development described in the rural place type category. The large footprint of the intended growth area recognizes the fact that the county’s unified development ordinance does not prioritize development in one or more portions of the planning area.



Scenario D

An “intended growth area” was delineated in CommunityViz for each scenario, which tested one or more priority growth areas for the Moncure planning area. Future development would be focused in areas identified in dark red on the map using rules, policies, or requirements adopted by Chatham County in the Plan Moncure Small Area Plan and/or the Chatham County Unified Development Ordinance. Large-scale or intense development would be discouraged in areas identified as grey on the map using other rules, policies, and requirements in the small area plan or unified development ordinance.

For Scenario D, all of the land inside a village center, community center, neighborhood center, employment center, or residential neighborhood place type area (indicated in dark red on the map) could develop in the future. These areas expand upon the vision and principles from of the Plan Chatham Comprehensive Plan to reach development intensities suitable to attract important destinations to the planning area (e.g., a grocery store or restaurants). Areas in grey on the map would predominately be reserved for open space or for low-scale, low-intensity development described in the rural place type category.

A

Single-Family Detached Home	Townhome	Apartment or Condominium	Accessory Dwelling Unit	Total Dwelling Units	Retail Space	Office Space	Industrial Space	Total Non-Residential Square Feet
								
1,341 d.u. (Planning Area)	670 d.u. (Planning Area)	0 d.u. (Planning Area)	50 d.u. (Planning Area)	2,061 d.u. (Planning Area)	60,978 s.f. (Planning Area)	18,459 s.f. (Planning Area)	4,966,234 s.f. (Planning Area)	5,045,671 s.f. (Planning Area)

B

Single-Family Detached Home	Townhome	Apartment or Condominium	Accessory Dwelling Unit	Total Dwelling Units	Retail Space	Office Space	Industrial Space	Total Non-Residential Square Feet
								
1,341 d.u. (Planning Area)	166 d.u. (Planning Area)	0 d.u. (Planning Area)	50 d.u. (Planning Area)	1,557 d.u. (Planning Area)	85,000 s.f. (Planning Area)	42,500 s.f. (Planning Area)	4,966,234 s.f. (Planning Area)	5,093,734 s.f. (Planning Area)

C

Single-Family Detached Home	Townhome	Apartment or Condominium	Accessory Dwelling Unit	Total Dwelling Units	Retail Space	Office Space	Industrial Space	Total Non-Residential Square Feet
								
779 d.u. (Planning Area)	136 d.u. (Planning Area)	2 d.u. (Planning Area)	25 d.u. (Planning Area)	942 d.u. (Planning Area)	42,500 s.f. (Planning Area)	17,000 s.f. (Planning Area)	4,116,234 s.f. (Planning Area)	4,175,734 s.f. (Planning Area)

D

Single-Family Detached Home	Townhome	Apartment or Condominium	Accessory Dwelling Unit	Total Dwelling Units	Retail Space	Office Space	Industrial Space	Total Non-Residential Square Feet
								
1,903 d.u. (Planning Area)	951 d.u. (Planning Area)	951 d.u. (Planning Area)	100 d.u. (Planning Area)	3,905 d.u. (Planning Area)	254,800 s.f. (Planning Area)	127,500 s.f. (Planning Area)	7,516,234 s.f. (Planning Area)	7,898,534 s.f. (Planning Area)

Side-by-Side Scenario Comparison:

Market Forecast Control Totals & Allocation Shortfalls, 2023 to 2040

Scenario A

Condition	SFD	SFA	MFS	ADU	RET	OFF	IND
Control Total	1,341	670	670	50	85,000	42,500	4,966,234
Growth Allocation	1,341	670	0	50	60,978	18,459	4,966,234
Shortfall	0	0	-670	0	-24,022	-24,041	0

Total DU 2,061
Total SF 5,045,671

Scenario B

Condition	SFD	SFA	MFS	ADU	RET	OFF	IND
Control Total	1,341	670	670	50	85,000	42,500	4,966,234
Growth Allocation	1,341	166	0	50	85,000	42,500	4,966,234
Shortfall	0	-504	-670	0	0	0	0

Total DU 1,557
Total SF 5,093,734

Scenario C

Condition	SFD	SFA	MFS	ADU	RET	OFF	IND
Control Total	779	389	389	25	42,500	17,000	4,116,234
Growth Allocation	779	136	2	25	42,500	17,000	4,116,234
Shortfall	0	-253	-387	0	0	0	0

Total DU 942
Total SF 4,175,734

Scenario D

Condition	SFD	SFA	MFS	ADU	RET	OFF	IND
Control Total	1,903	951	951	100	254,800	127,500	7,516,234
Growth Allocation	1,903	951	951	100	254,800	127,500	7,516,234
Shortfall	0	0	0	0	0	0	0

Total DU 3,905
Total SF 7,898,534



= Growth projected for this category in the scenario exceeds available supply. It is reasonable that some growth would occur in other locations near Moncure, including other parts of Chatham County, Wake County, Lee County, Apex, Holly Springs, or Sanford. Residents living outside the study area would need to commute into and out of Moncure to meet some of their daily needs (e.g., work, groceries, etc.).

Evaluation of Scenarios

The results of scenario planning exercises help residents and property owners choose the future that meets their expectations. These choices are made with an awareness of potential changes in the current development pattern in return for desired community benefits. By quantifying the potential impacts of each scenario, it is easier to compare the options, understand the trade-offs, and make informed choices about the future of the area.

PERFORMANCE MEASURES

Performance measures are the factors, or metrics, established to convey the likely impacts of future development when examined through the lens of the community's preferences and aspirations. Based on the themes of the input received from the residents, property owners, and other stakeholders, the CommunityViz model tested potential impacts.

The four scenarios presented for Moncure reflect the range of preferences expressed by the community while being mindful of opportunities and constraints, such as infrastructure availability and environmentally sensitive conditions. Though the assumptions and key features of each vary, all the options considered suggest an approach to growth management to accomplish the following: balance competing interests, manage change for the benefit of the Moncure area residents and property owners (present and future), and minimize the impacts of change that are likely as growth continues in the region.

EVALUATION OF 4 SCENARIOS

The evaluation of the scenarios by the community revealed that the community would generally be in favor of the following:

- Modifications to current zoning, as the amount of by-right development that is possible is not consistent with the rural pattern that defines Moncure today.
- A departure from the Plan Chatham (the Moncure portion of the adopted map), which precludes some of the types of development and amenities (i.e., parks) the community desires.
- The promotion of land conservation and low-density development (including large-lot subdivisions).

Side-by-Side Scenario Comparison: Performance Measures



Scenario A



+15
New Police Officers
Needed for 2040



+14
New Full-Time Firefighters
Needed in 2040



+49
County Park Acres
Needed in 2040



+5.0
New Greenway Miles
Needed in 2040



+585
New CCS Students from Moncure
Area Anticipated in 2040



59:41
Res. To Non-Res. Assessed
Value Ratio in 2040



2%
Land Held for Agriculture
or Woodlands in 2040



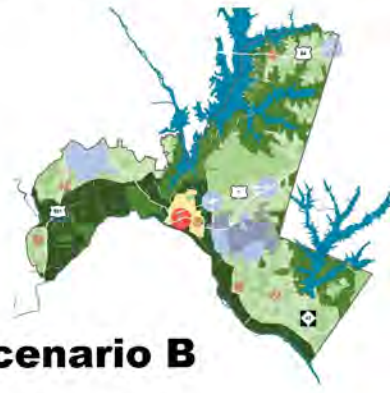
+380
D.U.'s Encroaching on Natural
Heritage Areas in 2040



+507
Acres of New Impervious
Surface (Estimate) in 2040



\$1,202 per DU | \$0.33 per NRSF
Net Annual Ad Valorem Tax
Revenue by Category in 2040



Scenario B



+14
New Police Officers
Needed for 2040



+13
New Full-Time Firefighters
Needed in 2040



+37
County Park Acres
Needed in 2040



+4.0
New Greenway Miles
Needed in 2040



+439
New CCS Students from Moncure
Area Anticipated in 2040



55:45
Res. To Non-Res. Assessed
Value Ratio in 2040



18%
Land Held for Agriculture
or Woodlands in 2040



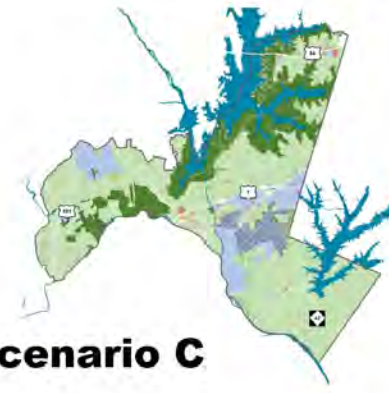
+83
D.U.'s Encroaching on Natural
Heritage Areas in 2040



+482
Acres of New Impervious
Surface (Estimate) in 2040



\$1,475 per DU | \$0.36 per NRSF
Net Annual Ad Valorem Tax
Revenue by Category in 2040



Scenario C



+10
New Police Officers
Needed for 2040



+5
New Full-Time Firefighters
Needed in 2040



+23
County Park Acres
Needed in 2040



+2.0
New Greenway Miles
Needed in 2040



+267
New CCS Students from Moncure
Area Anticipated in 2040



54:46
Res. To Non-Res. Assessed
Value Ratio in 2040



2%
Land Held for Agriculture
or Woodlands in 2040



+46
D.U.'s Encroaching on Natural
Heritage Areas in 2040



+365
Acres of New Impervious
Surface (Estimate) in 2040



\$1,805 per DU | \$0.34 per NRSF
Net Annual Ad Valorem Tax
Revenue by Category in 2040



Scenario D



+25
New Police Officers
Needed for 2040



+24
New Full-Time Firefighters
Needed in 2040



+89
County Park Acres
Needed in 2040



+9.0
New Greenway Miles
Needed in 2040



+1,107
New CCS Students from Moncure
Area Anticipated in 2040



57:43
Res. To Non-Res. Assessed
Value Ratio in 2040



9%
Land Held for Agriculture
or Woodlands in 2040



+165
D.U.'s Encroaching on Natural
Heritage Areas in 2040



+815
Acres of New Impervious
Surface (Estimate) in 2040



\$912 per DU | \$0.33 per NRSF
Net Annual Ad Valorem Tax
Revenue by Category in 2040

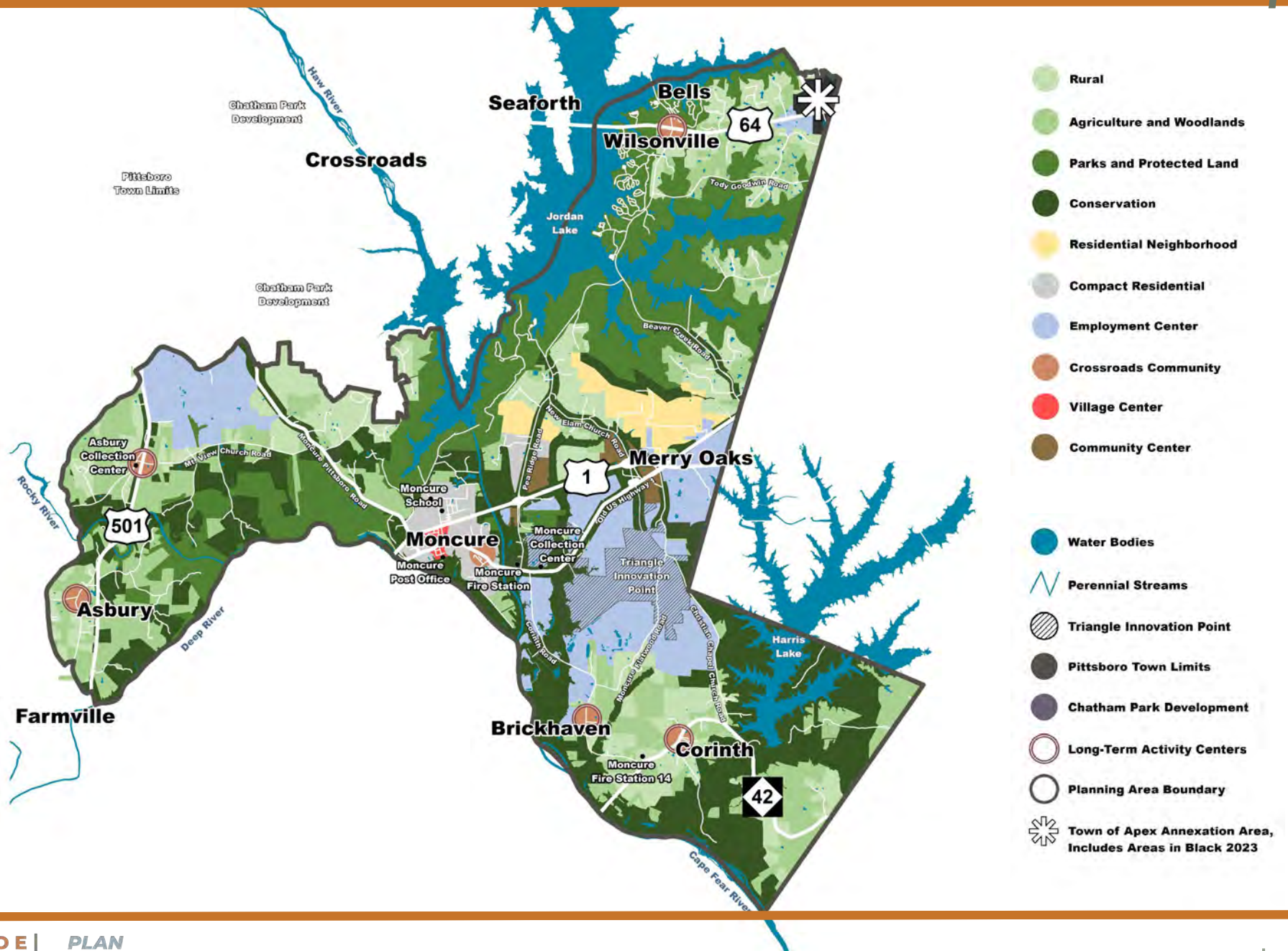
Vision Map (Preferred Scenario)

The Vision Map reflects many of the features the community expressed support for following the presentation of the model results. The map depicts a land use pattern that draws from elements in each of the four scenarios.

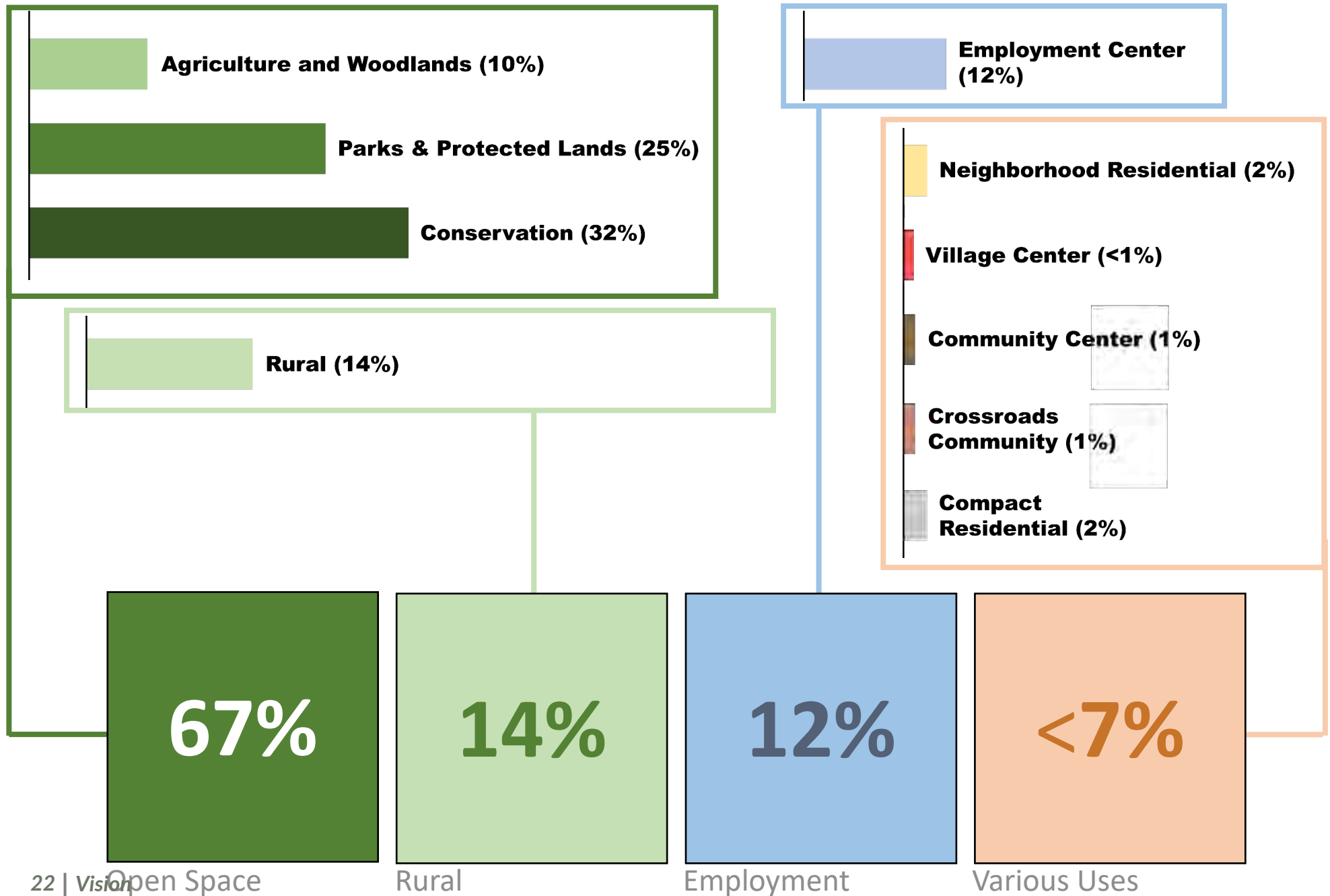
Key Features

- Parks & Protected Lands – This has been expanded to include Parker Ridge Park and other amenities proposed in the P&R Master Plan.
- Conservation – This has been expanded to encompass more areas, such as important cultural assets, the gamelands near Harris Lake, and all floodplains.
- Agriculture – This includes all parcels participating in PUV and VAD programs.
- Rural – This is a larger area to reflect the interest expressed in Rural in Scenario C
- Neighborhood Residential – Created a new Place Type to distinguish lower density residential from Compact Residential, and reduced Compact Residential
- Compact Residential –
 - Limited these areas to where development aligns with the Place Type and is described as “Developed, Not Likely to Redevelop” in Development Status
 - Added to sites in the committed development inventory that can actually achieve this.
 - Removed from outlying areas around Crossroads Community
- Crossroads Community –
 - Retained condition of Plan Chatham, and eliminated Neighborhood Center place type suggested in Scenario D.
 - Noted future development of nodes with dashed outline. These would be considered as locations for development beyond the planning horizon (2040)
- Village – Only the historic Moncure core has this place type applied.
- Community Center – Changed Employment around interchanges 81 and 84 to eliminate some industrial and create places for retail and office opportunities near US-1. Applied to suitable sites owned by willing property owners.
- Employment –
 - Restricted to areas on south side of US-1 except where the 3M quarry is still in operation
 - These areas encompass the lands where:
 - The current zoning is IL, IH, O&I, NB, ...
 - The development status of existing development is “Developed, Not Likely to Redevelop”
 - Shifted total area to remove Employment from lands that are not being used for such uses per the zoning, and redistributed to suitable sites owned by willing property owners.

Vision Map

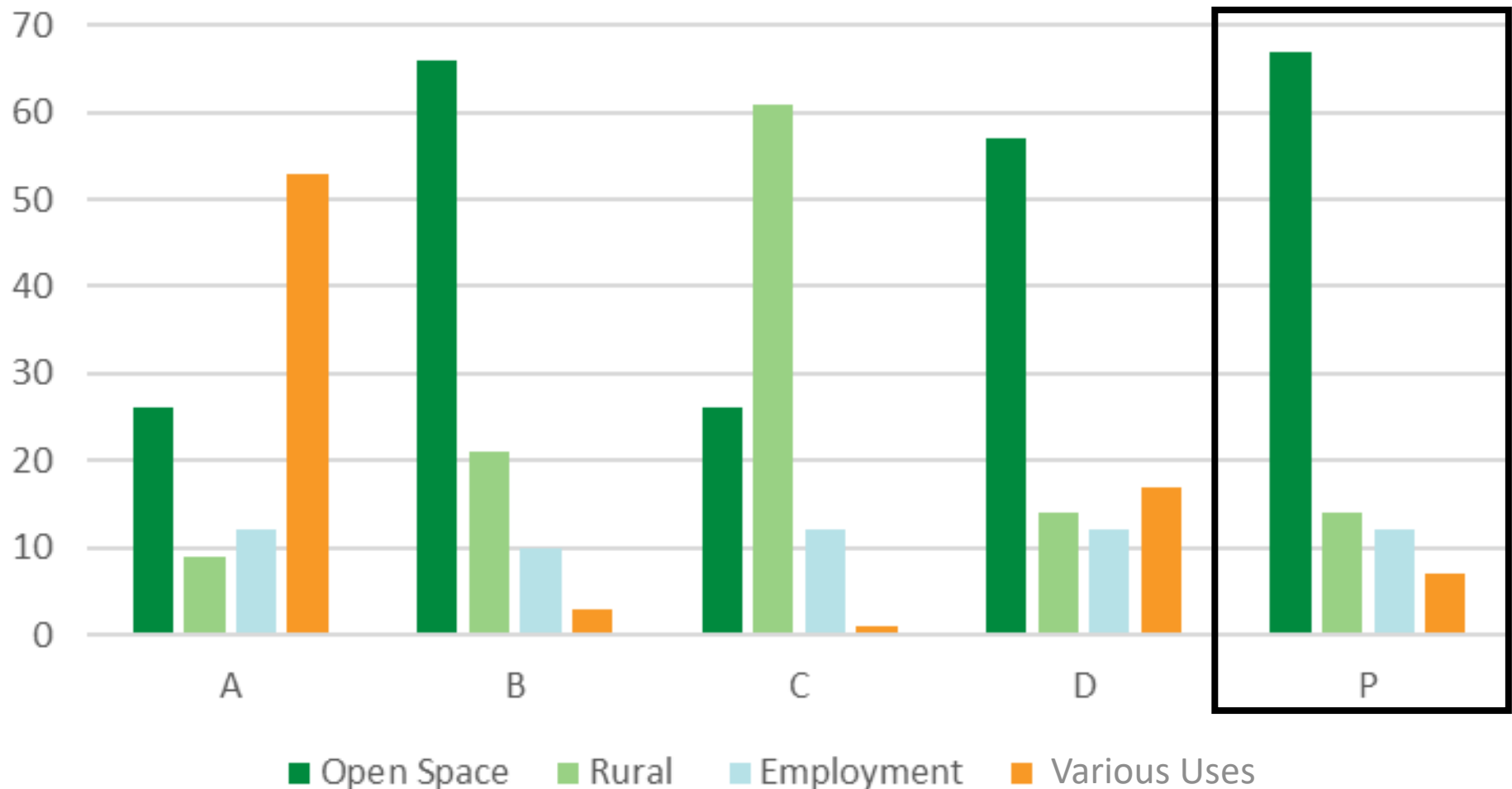


Distribution of Place Types



Distribution of Place Types

- As much 'Open Space' as B (*Plan Chatham*)
- Rural - major component, but 'Open Space' offers more opportunity for protecting character
- Area for Employment is relatively constant across all
- Limited area for more intense uses (less area than A and D but not as limited as B and C)



Future Development (2023-40)

RESIDENTIAL

Single-Family Detached Home



1,900 d.u.
(Planning Area)

Townhome



950 d.u.
(Planning Area)

Apartment or Condominium



652 d.u.
(Planning Area)

Accessory Dwelling Unit



100 d.u.
(Planning Area)

Total Dwelling Units

3,602 d.u.
(Planning Area)

NONRESIDENTIAL

Retail Space



170,000 s.f.
(Planning Area)

Office Space



85,000 s.f.
(Planning Area)

Industrial Space



3,825,000 s.f.
(Planning Area)

Total Non-Residential Square Feet

4,080,000 s.f.
(Planning Area)

Future Needs



11
Police
Officers
in 2022

Source: Annual Comprehensive
Financial Report, FY 2021-22

+17
New Police
Officers Needed
for 2040

Source: Computation, City Explained, Inc.



76:24
Res. To Non-Res.
Assessed Value
Ratio in 2022

Source: Computation, City Explained, Inc.

69:31
Res. To Non-Res.
Assessed Value
Ratio in 2040

Source: Computation, City Explained, Inc.



11
Full-Time
Firefighters
in 2022

Source: Moncure Fire Department website

+17
New Full-Time
Firefighters
Needed in 2040

Source: Computation, City Explained, Inc.



23%
Land Held for
Agriculture or
Woodlands in 2022

Source: Chatham County GIS Tax Parcels, Present Use Value

10%
Land Held for
Agriculture or
Woodlands in 2040

Source: Computation, City Explained, Inc.



145
County Park
Acres Planned
in 2022

Source: Chatham County Parks and Recreation CMP

+83
County Park
Acres Needed
in 2040

Source: Computation, City Explained, Inc.



344
D.U.'s Encroaching
on Natural Heritage
Areas in 2022

Source: Computation, City Explained, Inc.

+128
D.U.'s Encroaching
on Natural Heritage
Areas in 2040

Source: Computation, City Explained, Inc.



13.6
Greenway
Miles in 2022

Source: Chatham County Parks and Recreation CMP

+8.0
New Greenway
Miles Needed in
2040

Source: Computation, City Explained, Inc.



255
Acres of
Impervious Surface
(Estimate) in 2022

Source: Computation, City Explained, Inc.

+542
Acres of New
Impervious Surface
(Estimate) in 2040

Source: Computation, City Explained, Inc.



8,767
CCS System
Students
in 2022

Source: Annual Comprehensive
Financial Report, FY 2021-22

+1,019
New CCS Students
from Moncure Area
Anticipated in 2040

Source: Computation, City Explained, Inc.



\$604 per DU | \$0.06 per NRSF
Net Annual Ad Valorem
Tax Revenue by
Category in 2022

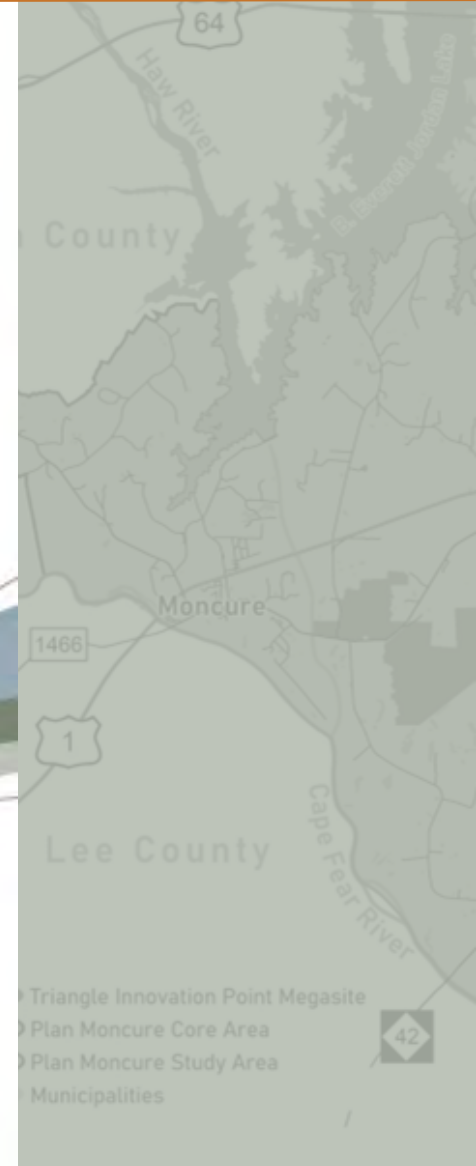
Source: Computation, City Explained, Inc.

\$483 per DU | \$0.46 per NRSF
Net Annual Ad Valorem
Tax Revenue by
Category in 2040

Source: Computation, City Explained, Inc.

PROJECT MAPS

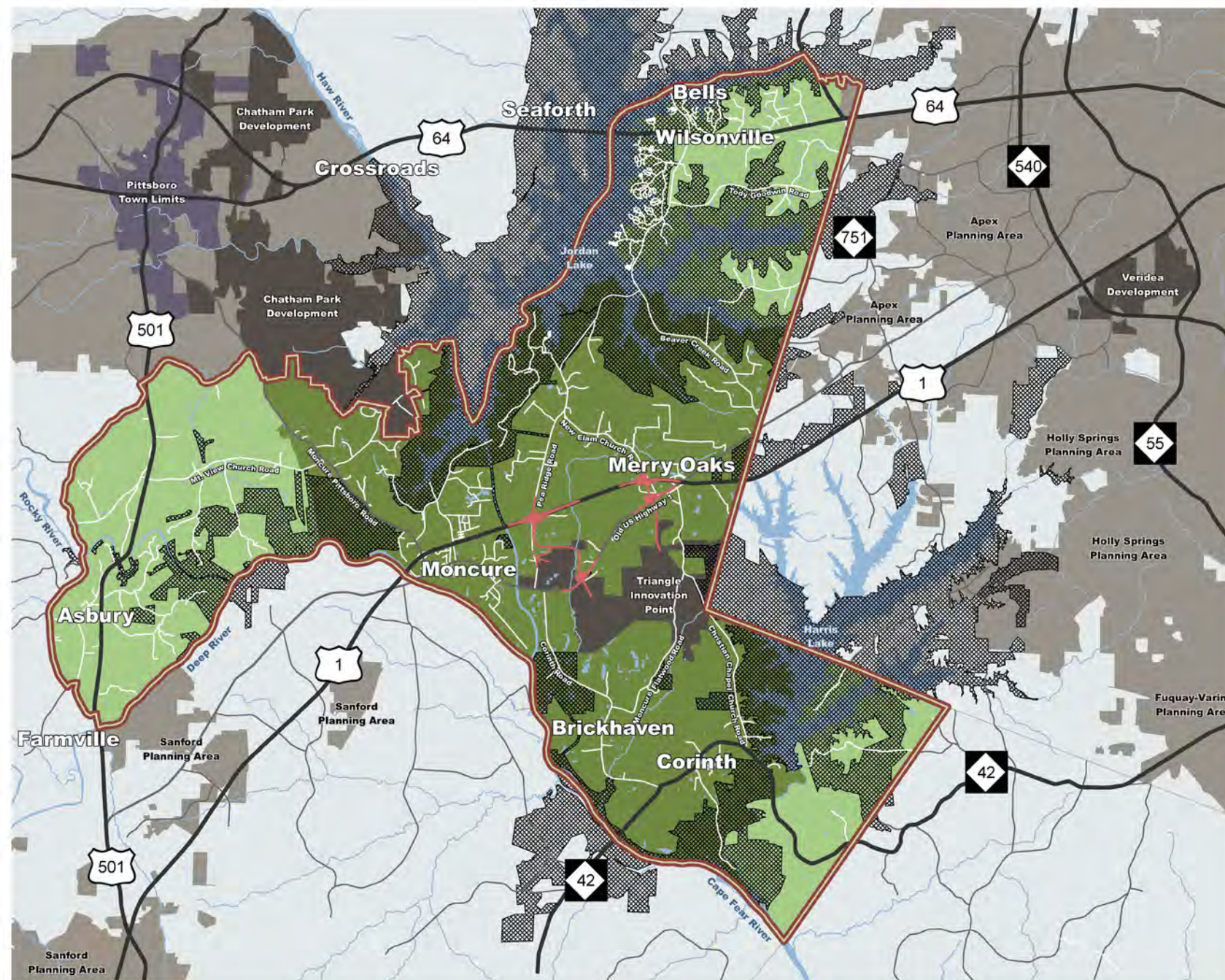
08.16.2023



General Base Map

-  Road Improvements Underway
-  Unincorporated County
-  Pittsboro Town Limits
-  Town Planning Area
-  Major Activity Center
-  Moncure Small Area Plan Study Area
-  Moncure Small Area Plan Focus Area
-  Water Body
-  Managed Land Area (Open Space)

March 13, 2023



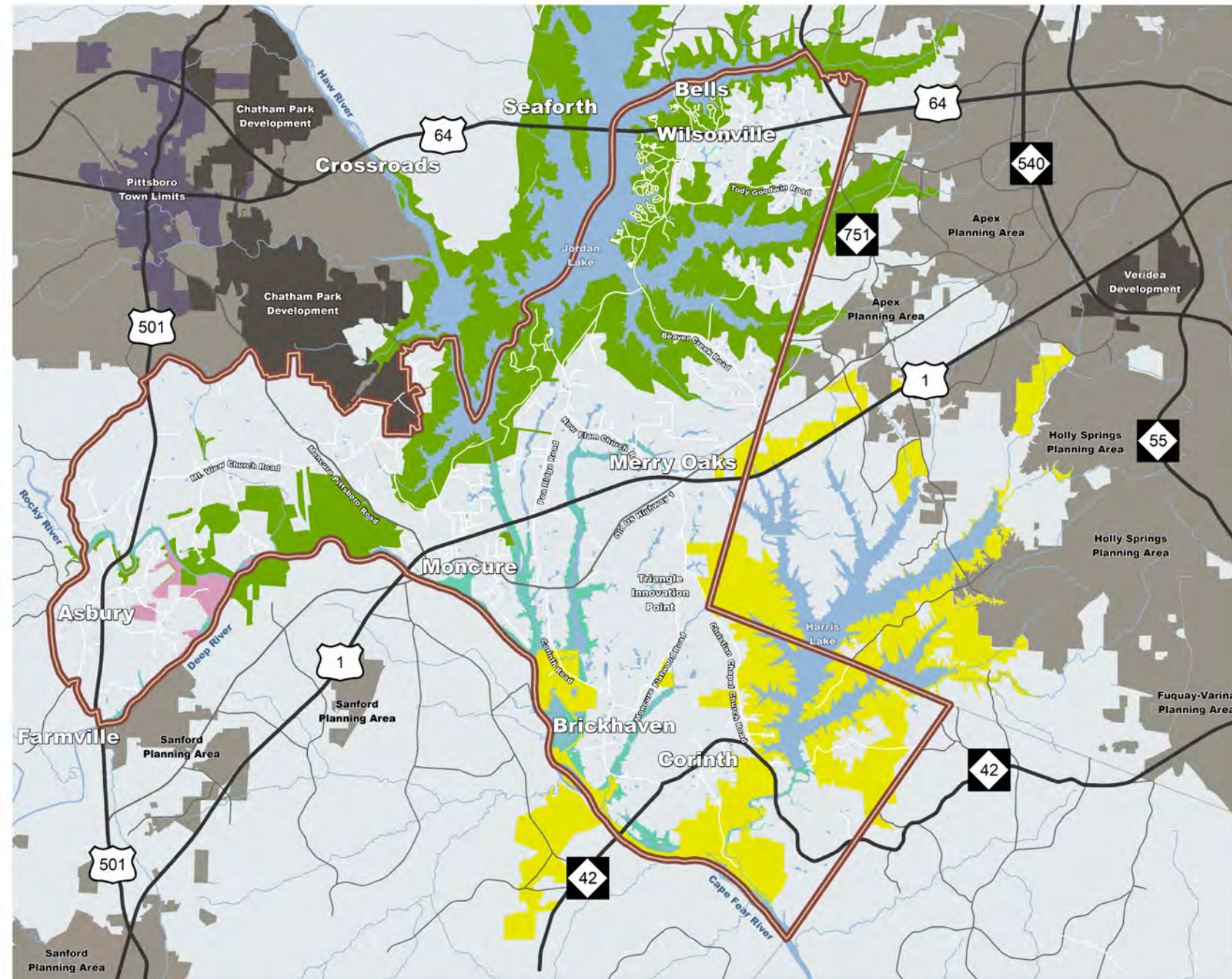
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Managed & Protected Lands

-  Water or Wetland
-  Floodplain
-  Game Lands
-  Private Protected Lands
-  Government Owned Protected Lands

-  Unincorporated County
-  Pittsboro Town Limits
-  Town Planning Area
-  Major Activity Center

March 15, 2023

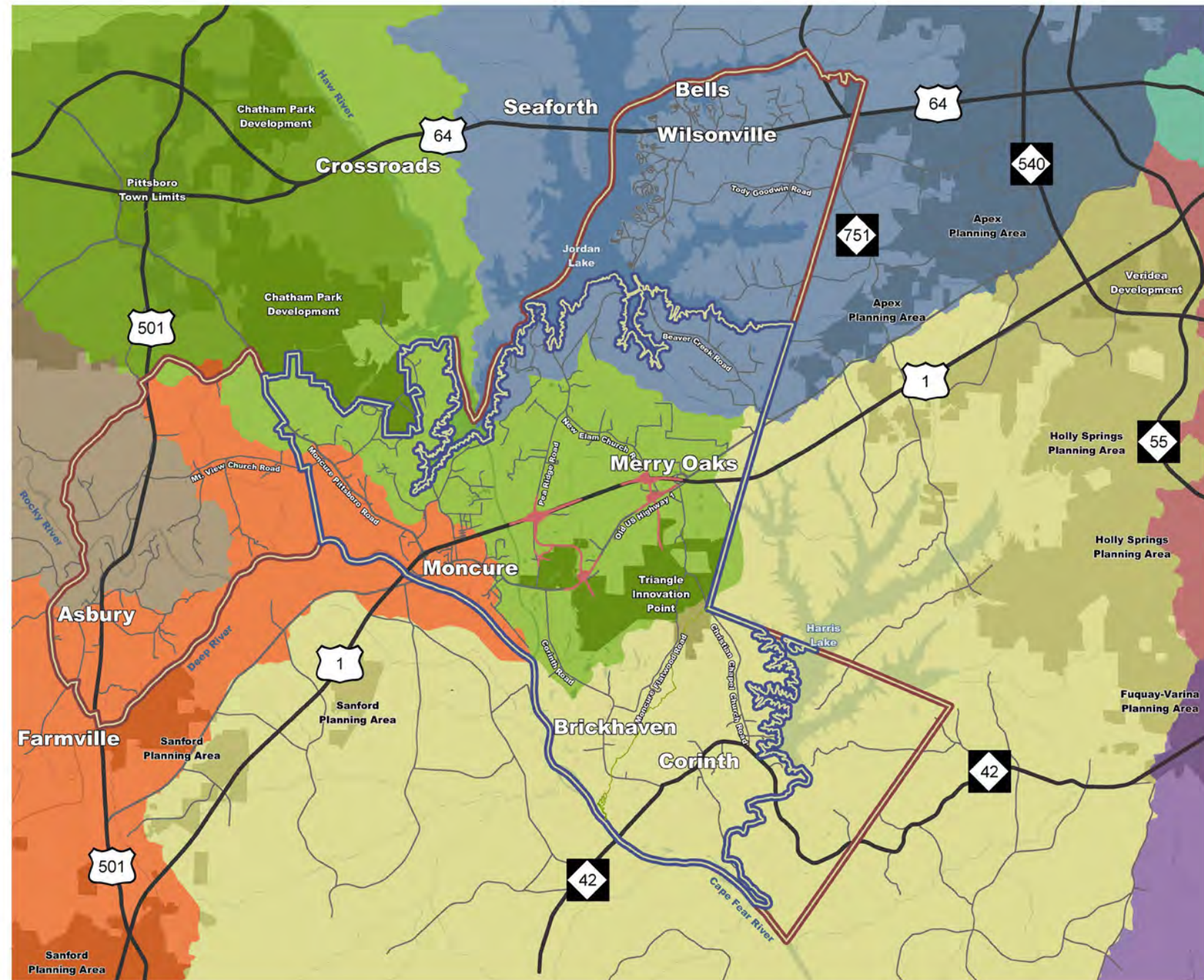


Major Watersheds Map
Ten-Digit Hydrologic Unit Code

- Road Improvements Underway
- Major Activity Center
- Town Planning Area
- Water Body
- Moncure Small Area Plan Study Area
- Moncure Small Area Plan Focus Area
- Roberson Creek-Haw River Watershed
- B Everett Jordan Lake-New Hope River
- Buckhorn Creek-Cape Fear River Watershed
- Lower Deep River Watershed
- Rocky River Watershed
- Swift Creek Watershed
- Middle Creek Watershed
- Buies Creek-Cape Fear River Watershed



March 13, 2023

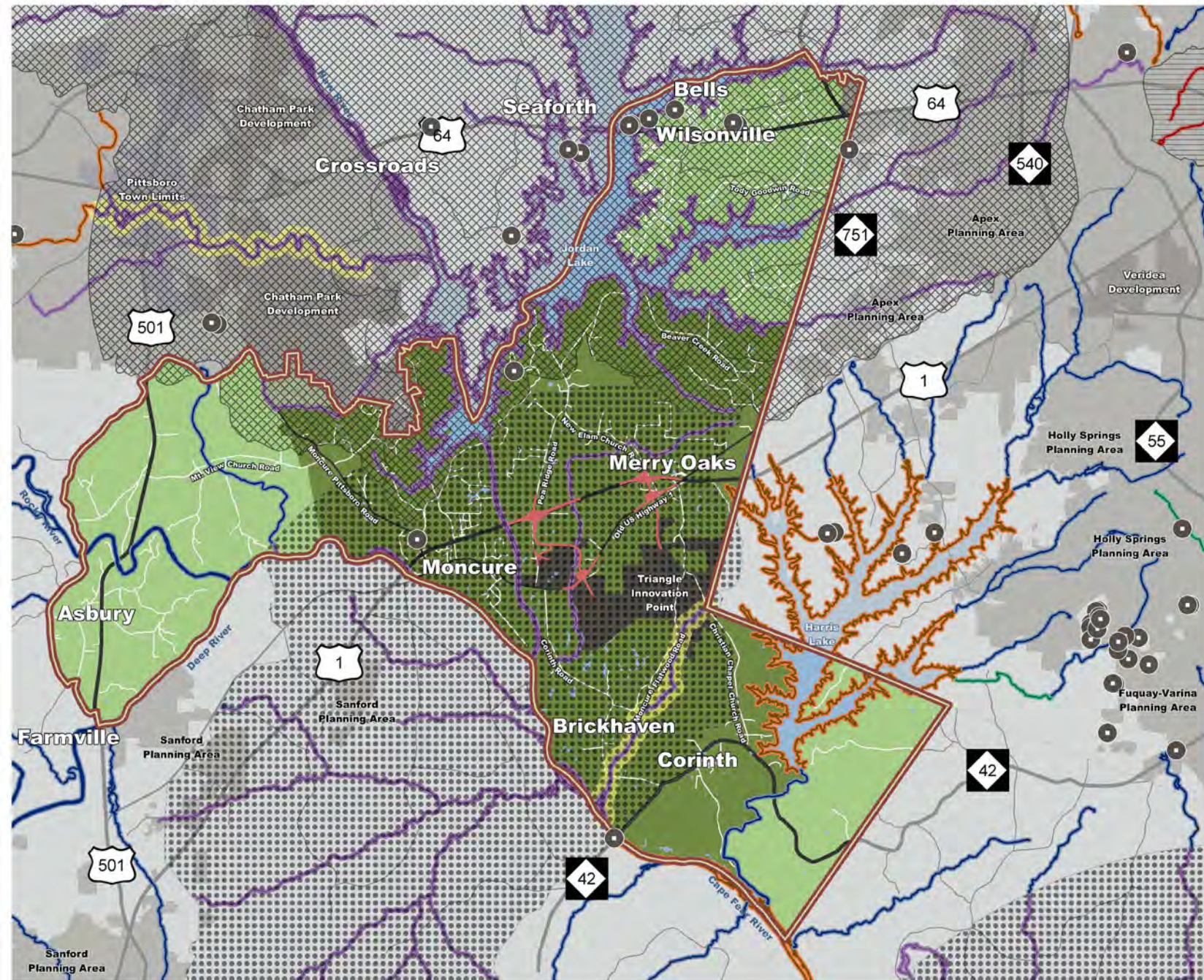


Surface Water Classifications Map

- Road Improvements Underway
- Major Activity Center
- Town Planning Area
- Water Body
- Moncure Small Area Plan Study Area
- Moncure Small Area Plan Focus Area
- ~ Class B Stream or Water Body
- ~ Class C Stream or Water Body
- ~ Class WS-II Stream or Water Body
- ~ Class WS-III Stream or Water Body
- ~ Class WS-IV Stream or Water Body
- ~ Class V Stream or Water Body
- 303-D Stream Classification
- Class WS-IV Water Supply Watershed
- Class WS-IV Water Supply Watershed, Neuse River Basin Rules
- Class WS-III Water Supply Watershed, Neuse River Basin Rules
- Public Water Supply Water Source



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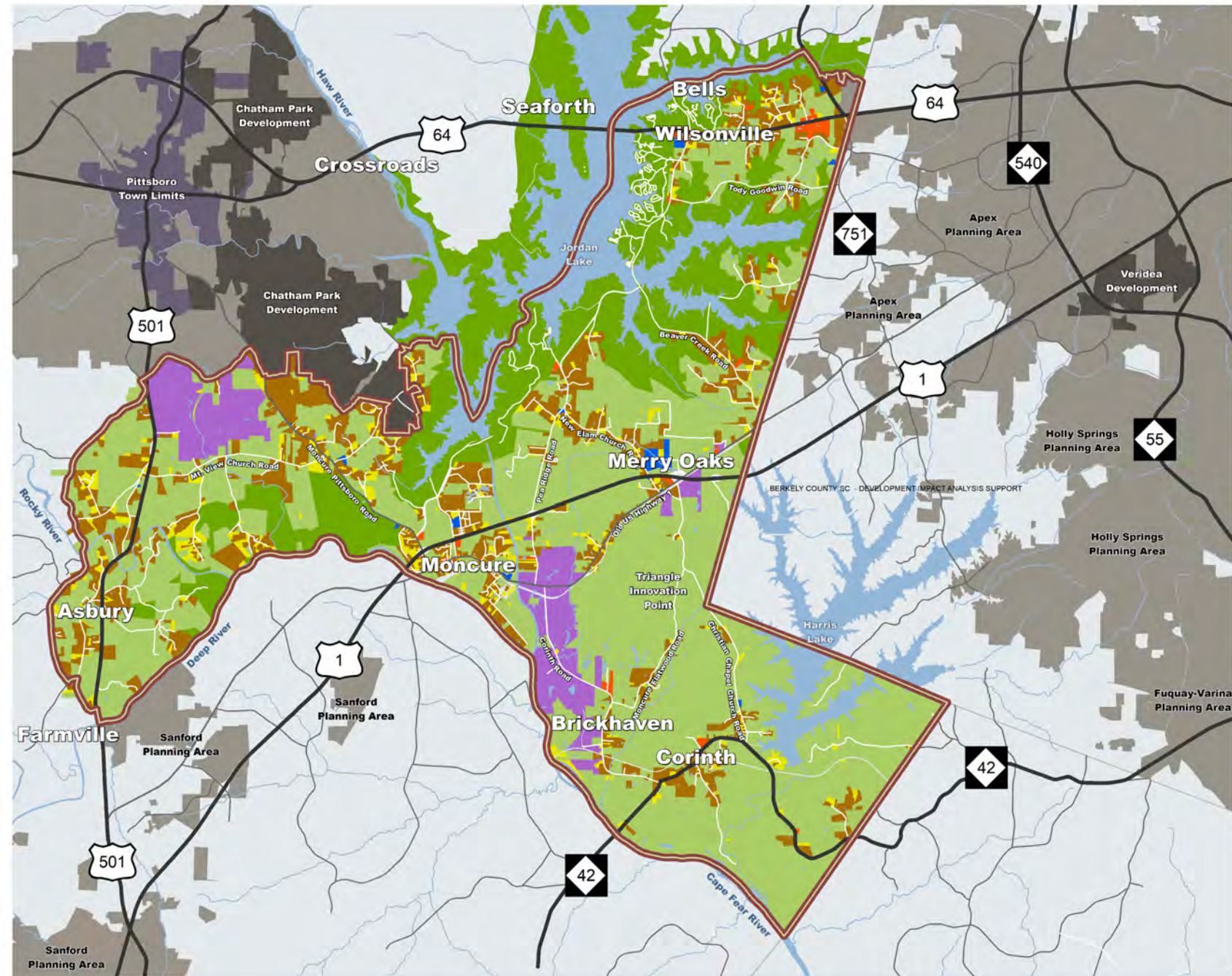
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Existing Land Use

- Business Commercial
- Institutional
- Industrial
- Residential
- Vacant
- Agriculture or Forestry
- Protected

- Unincorporated County
- Pittsboro Town Limits
- Town Planning Area
- Major Activity Center

March 15, 2023

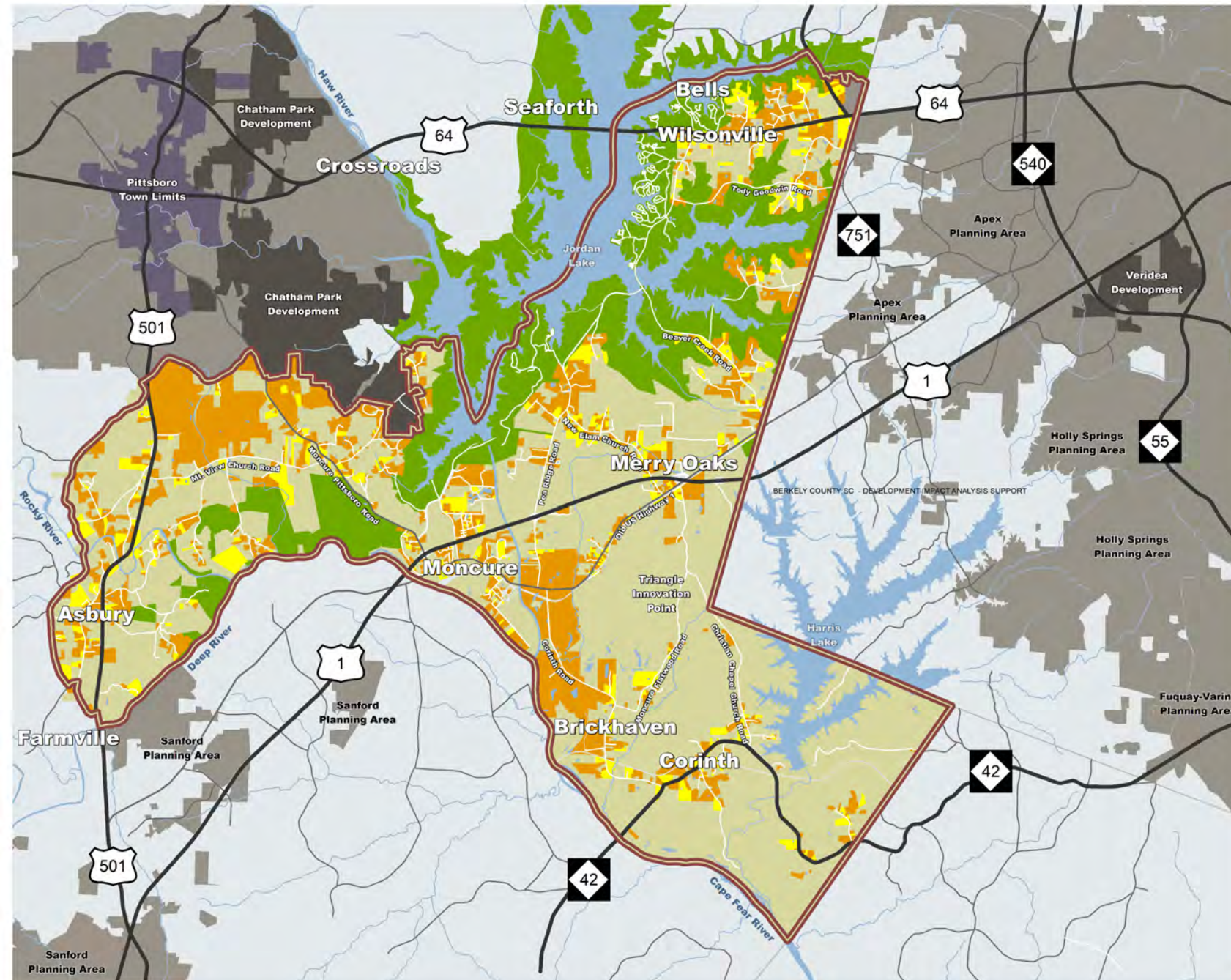


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Development Status

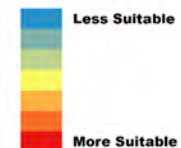
- Undeveloped
- Protected
- Underdeveloped
- Developed
- Unincorporated County
- Pittsboro Town Limits
- Town Planning Area
- Major Activity Center

March 15, 2023



RECODE CHATHAM | PLAN MONCURE

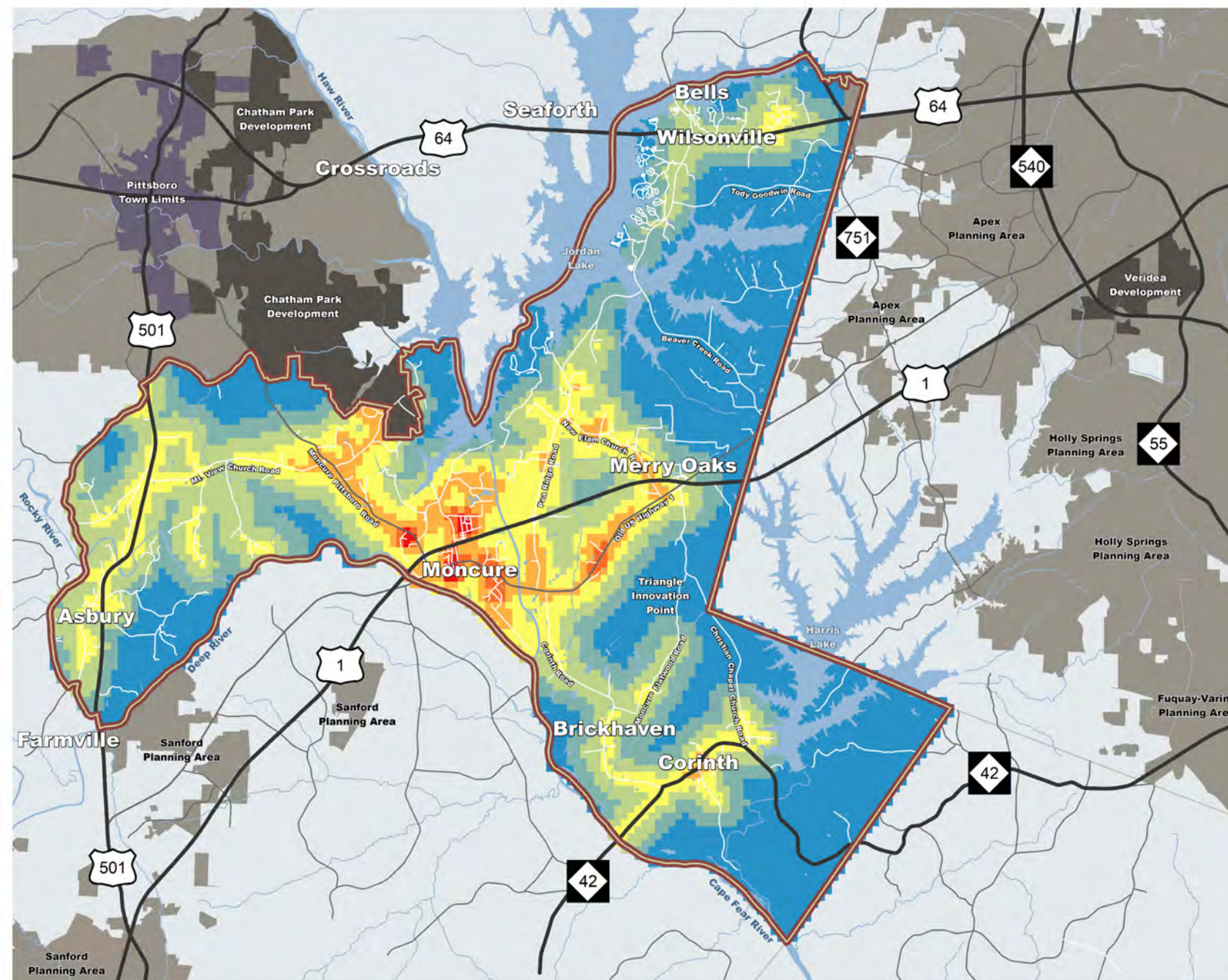
Residential Suitability



- Unincorporated County
- Pittsboro Town Limits
- Town Planning Area
- Major Activity Center

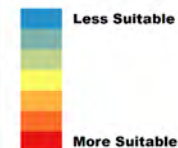


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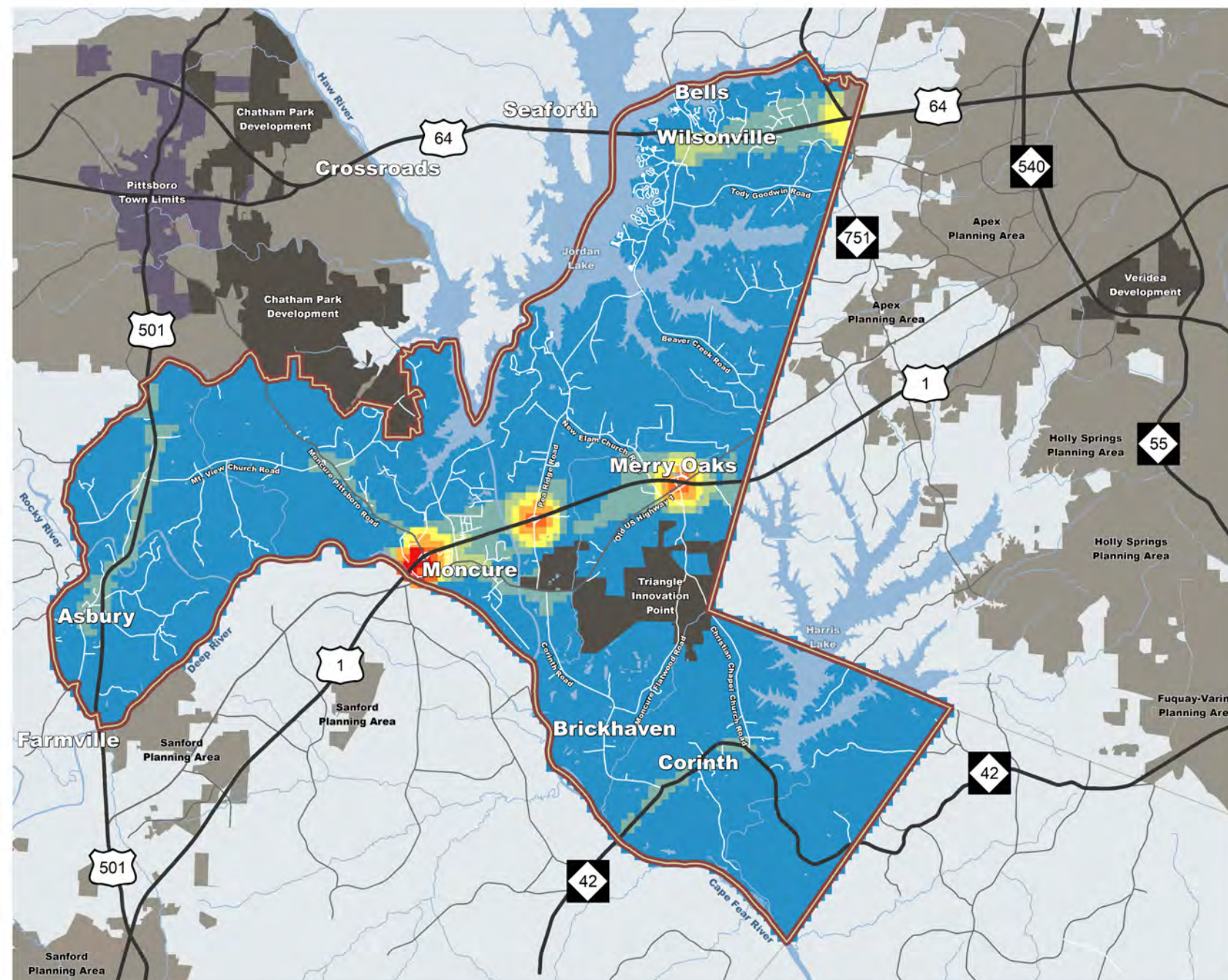
Commercial Suitability



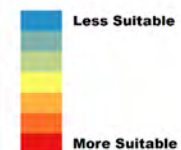
- Unincorporated County
- Pittsboro Town Limits
- Town Planning Area
- Major Activity Center



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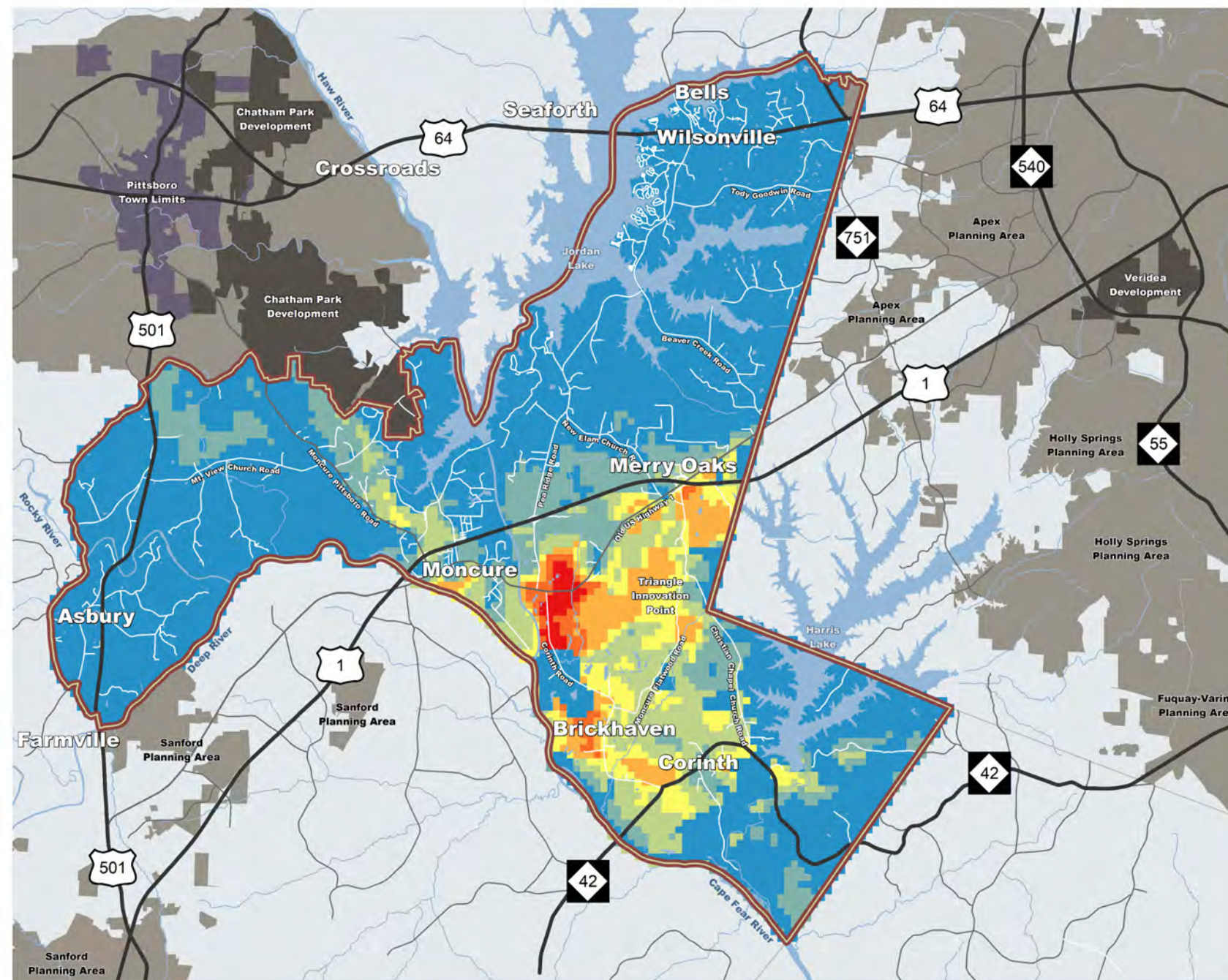


Industrial Suitability



- Unincorporated County
- Pittsboro Town Limits
- Town Planning Area
- Major Activity Center

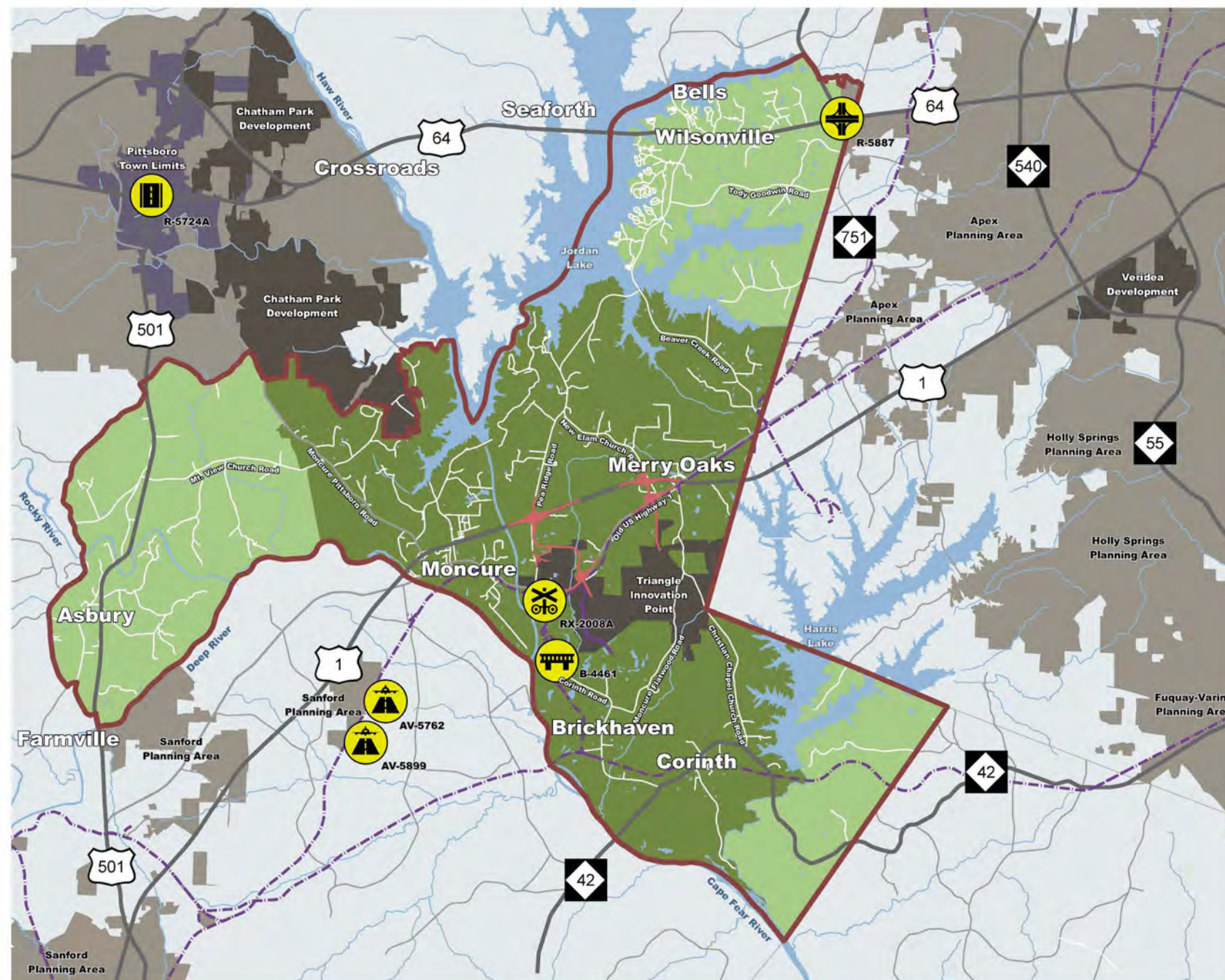
March 15, 2023



Existing and Planned Transportation Network Map

- Road Improvements Underway
- Unincorporated County
- Pittsboro Town Limits
- Town Planning Area
- Major Activity Center
- Moncure Small Area Plan Study Area
- Moncure Small Area Plan Focus Area
- Water Body
- State Transportation Improvement Projects, 2020-2029
- Railroad

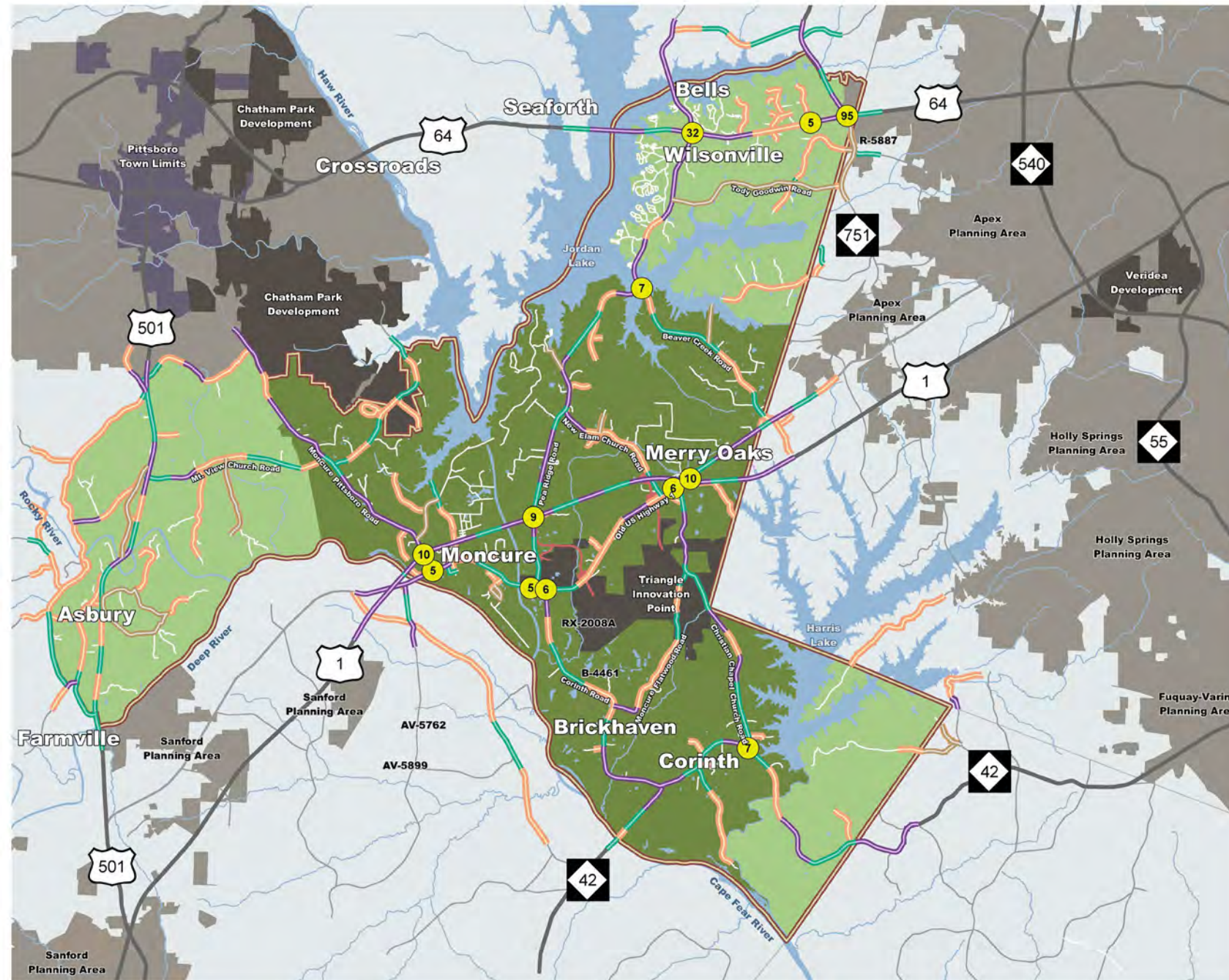
March 15, 2023



Transportation Safety Conditions Map

- Road Improvements Underway
- Unincorporated County
- Pittsboro Town Limits
- Town Planning Area
- Major Activity Center
- Moncure Small Area Plan Study Area
- Moncure Small Area Plan Focus Area
- Water Body
- High-Crash Frequency Location
(Number of Crashes Noted with Labels)
- ~ Combined Safety Rating, 0 to 33
- ~ Combined Safety Rating, 33 to 66
- ~ Combined Safety Rating, 66 to 100
- ~ Combined Safety Rating, Less than 60% Mileposted

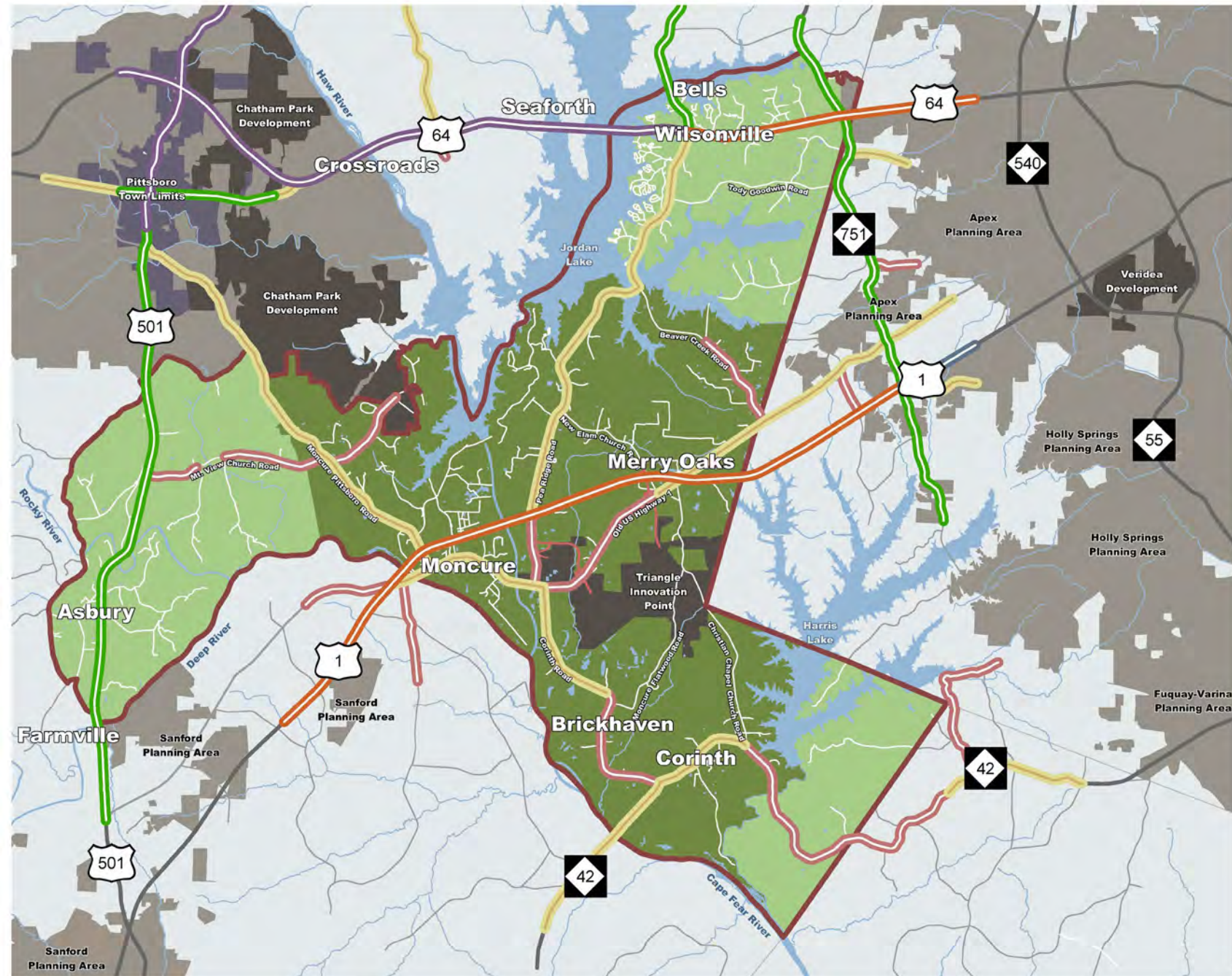
March 20, 2023



2021 Average Daily Traffic Volume Counts



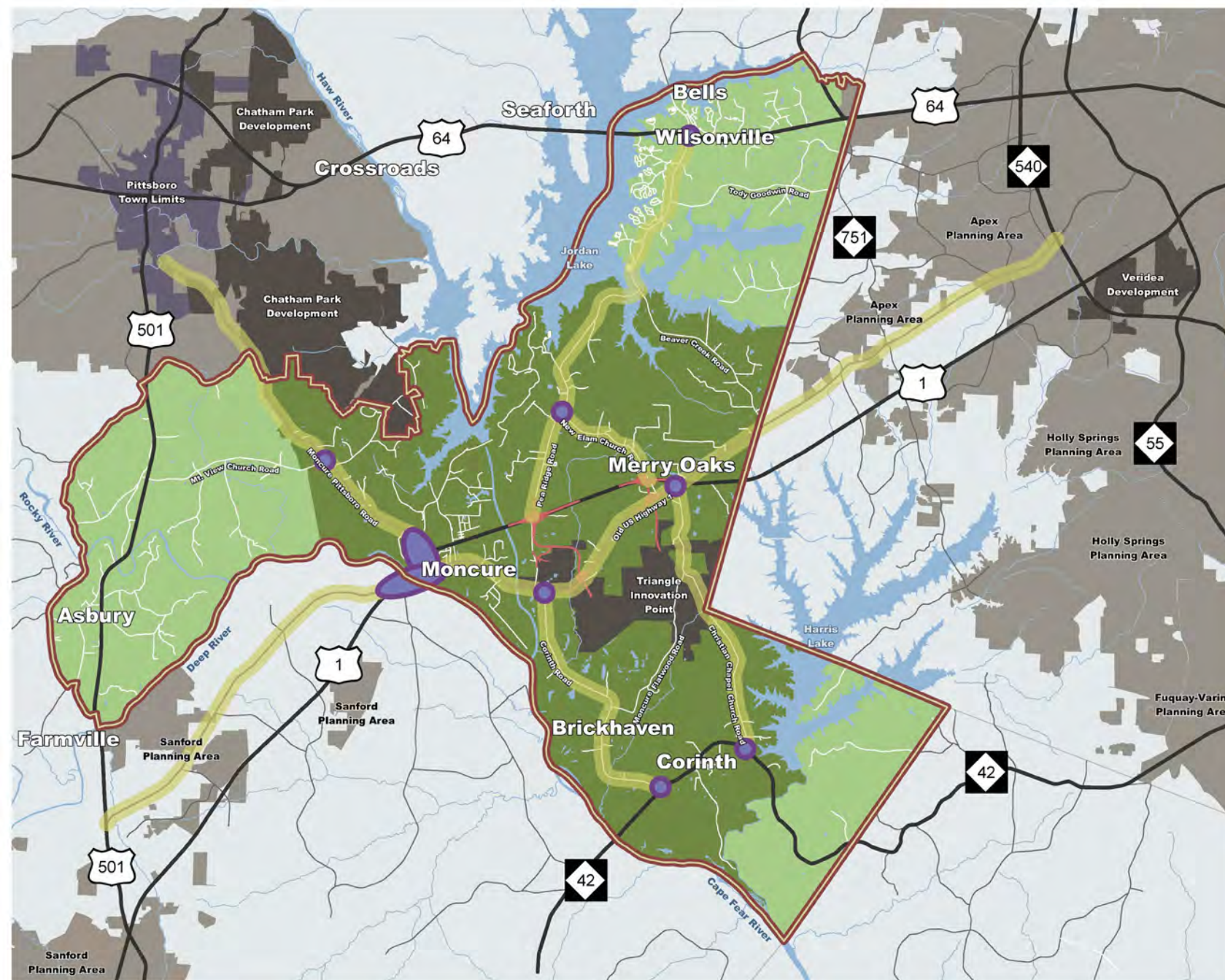
March 15, 2023



Near-Term Needs for the Transportation System

- Road Improvements Underway
- Unincorporated County
- Pittsboro Town Limits
- Town Planning Area
- Major Activity Center
- Moncure Small Area Plan Study Area
- Moncure Small Area Plan Focus Area
- Water Body
- Transportation, Points of Interest
- Transportation, Corridors of Interest

March 15, 2023



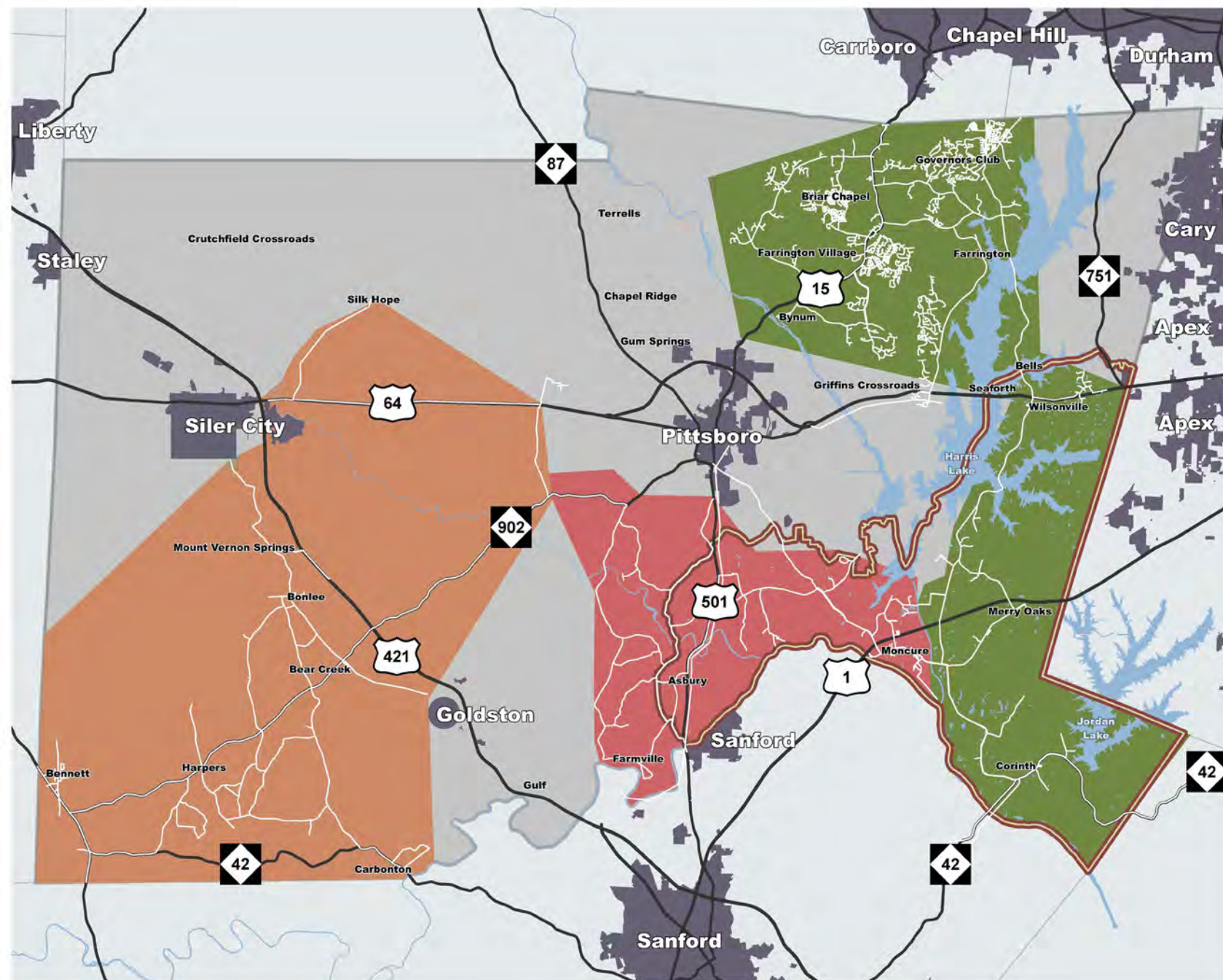
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Water Service Area Map

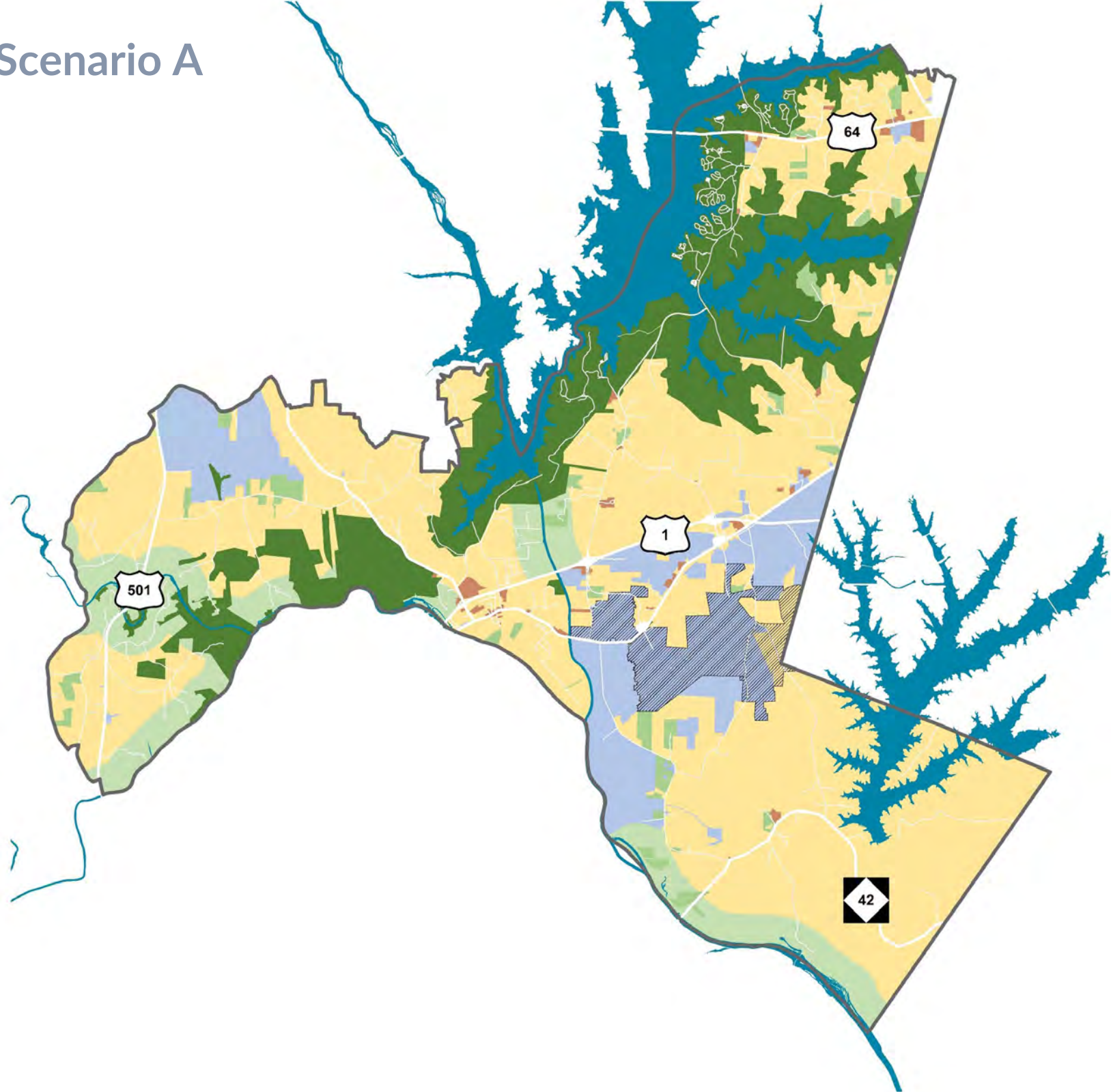
- Asbury Water Service Area
- North Water Service Area
- Southwest Water Service Area
- Municipal Limits
- Chatham County
- Surrounding Counties
- Water Bodies
- Moncure Small Area Plan Study Area Boundary
- Major Roads
- Existing Water Lines



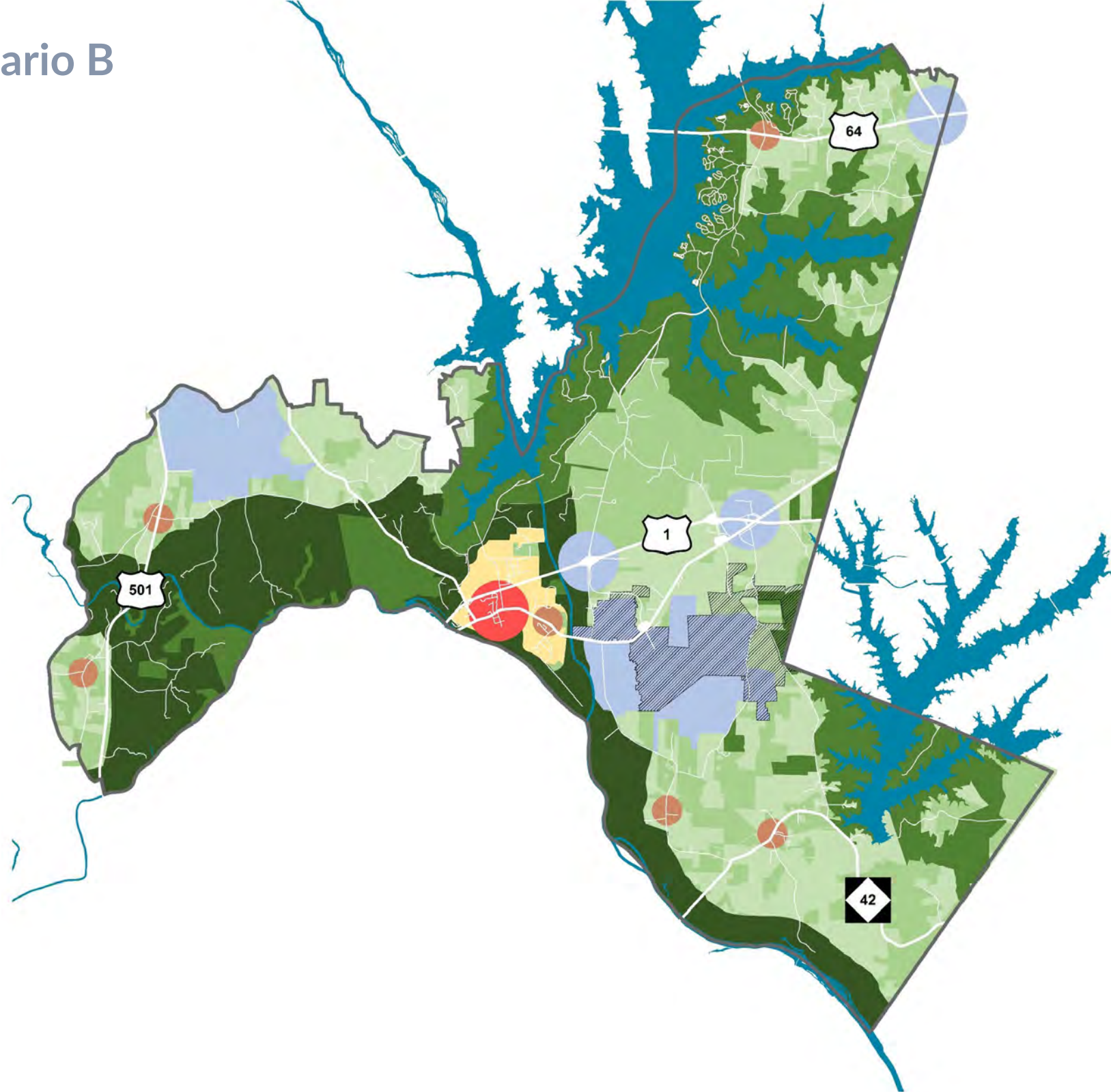
March 14, 2023



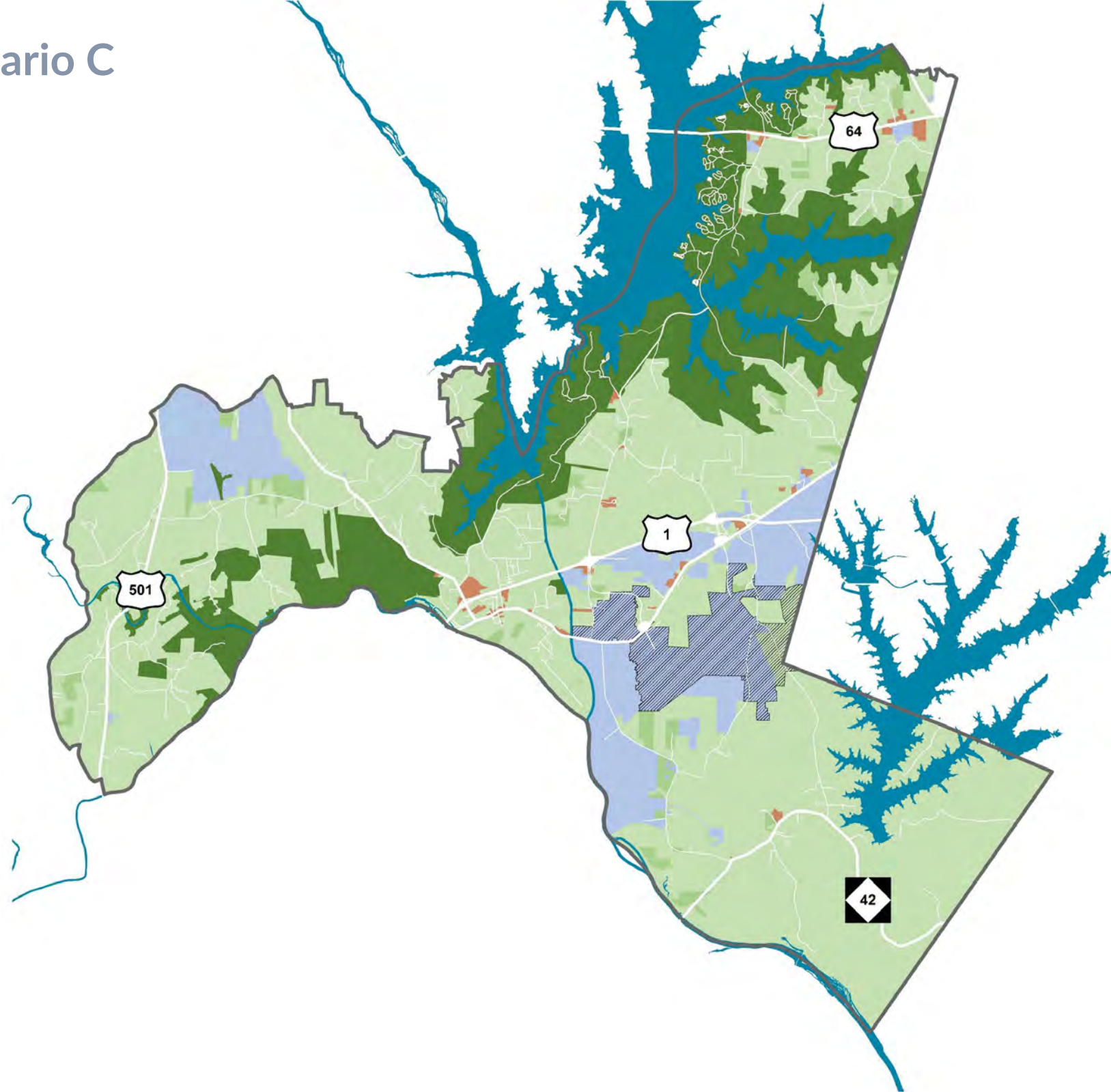
Scenario A



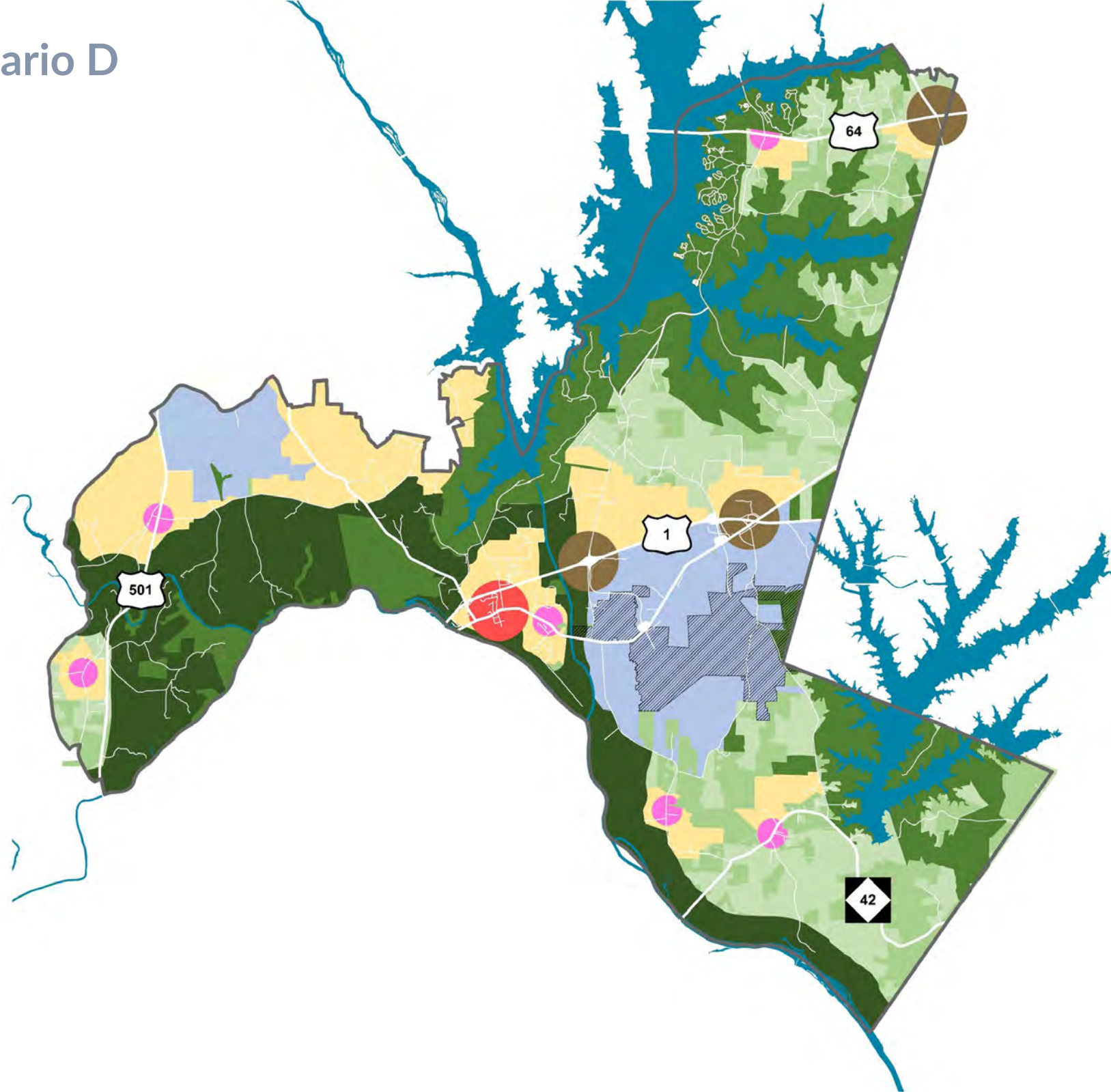
Scenario B



Scenario C



Scenario D



Future Land Use Map

- | | |
|---|--|
|  Rural |  Water Bodies |
|  Agriculture and Woodlands |  Perennial Streams |
|  Parks and Protected Land |  Triangle Innovation Point |
|  Conservation |  Pittsboro Town Limits |
|  Residential Neighborhood |  Chatham Park Development |
|  Compact Residential |  Long-Term Activity Centers |
|  Employment Center |  Planning Area Boundary |
|  Crossroads Community |  Town of Apex Annexation Area, Includes Areas in Black 2023 |
|  Village Center | |
|  Community Center | |

July 19, 2023

