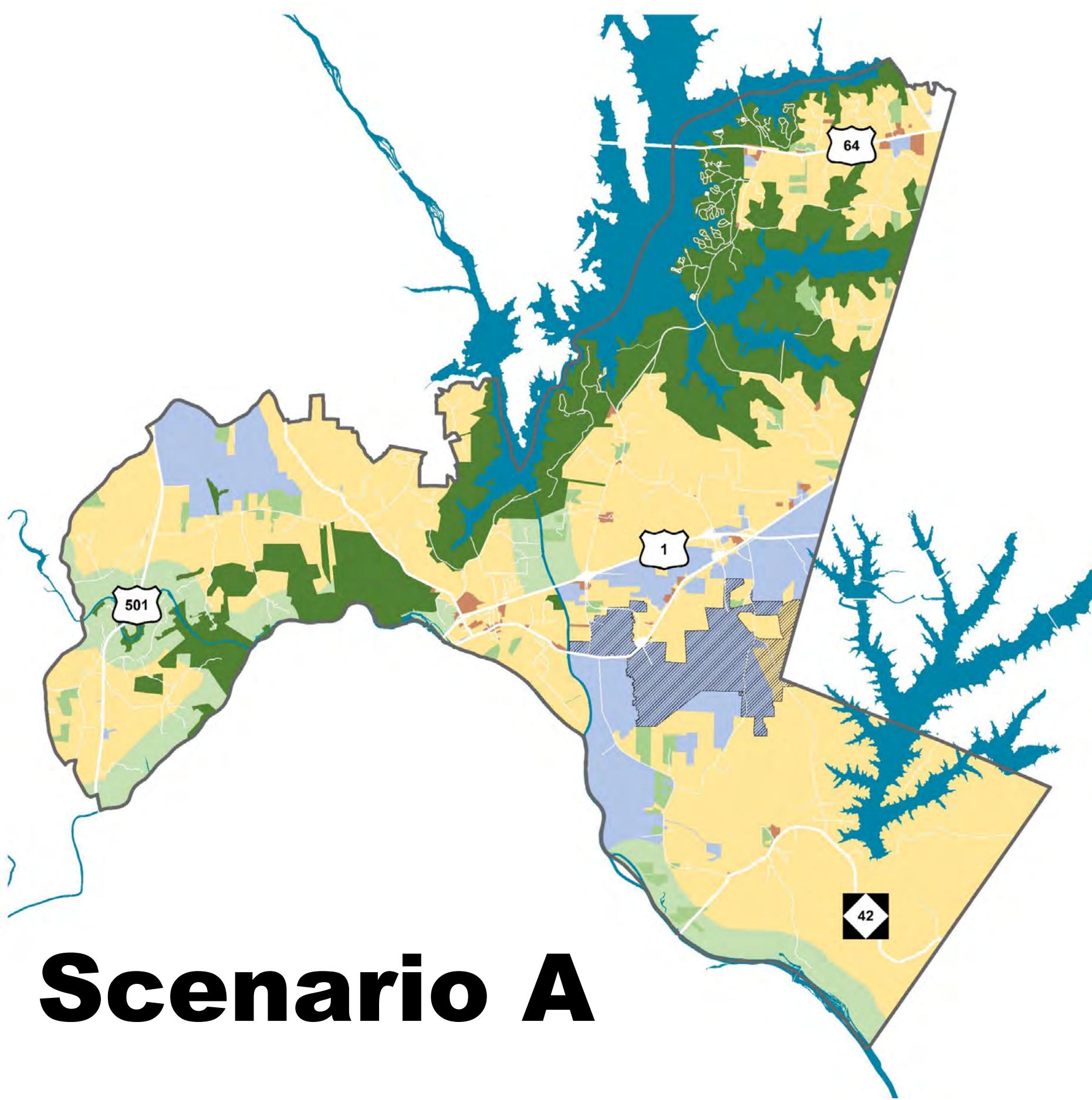


Side-by-Side Scenario Comparison: Plan Framework Maps

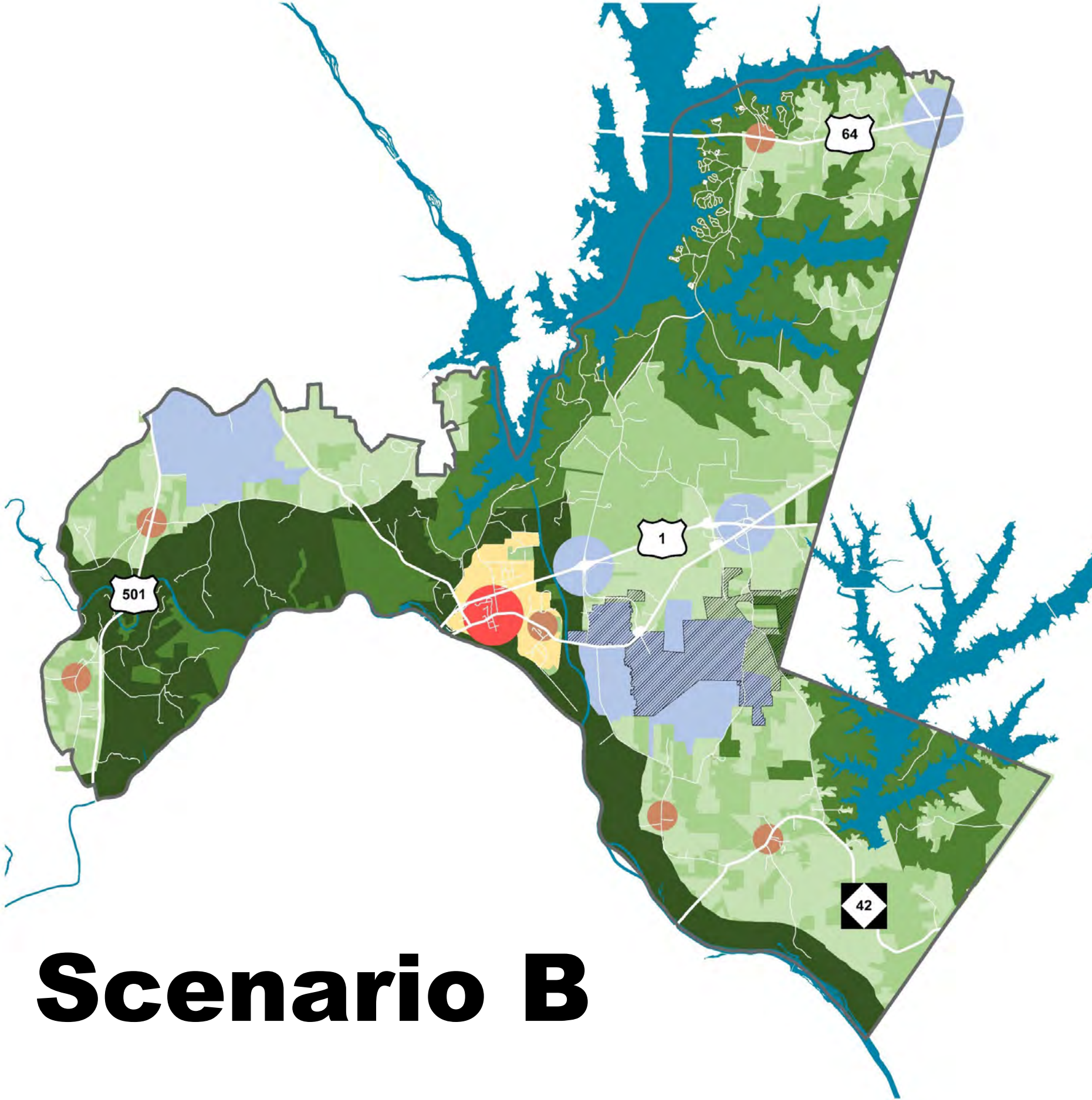
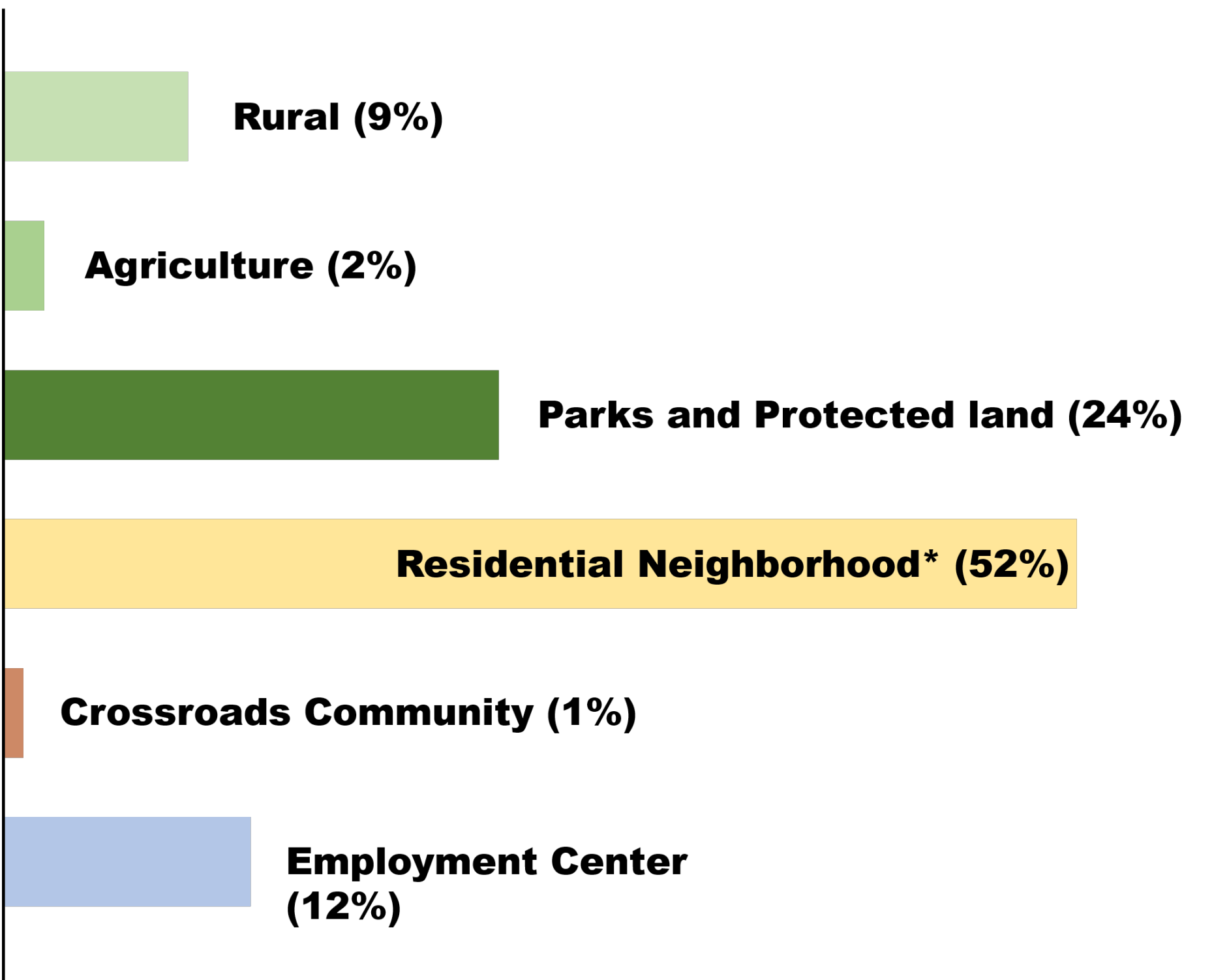


Scenario A

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.

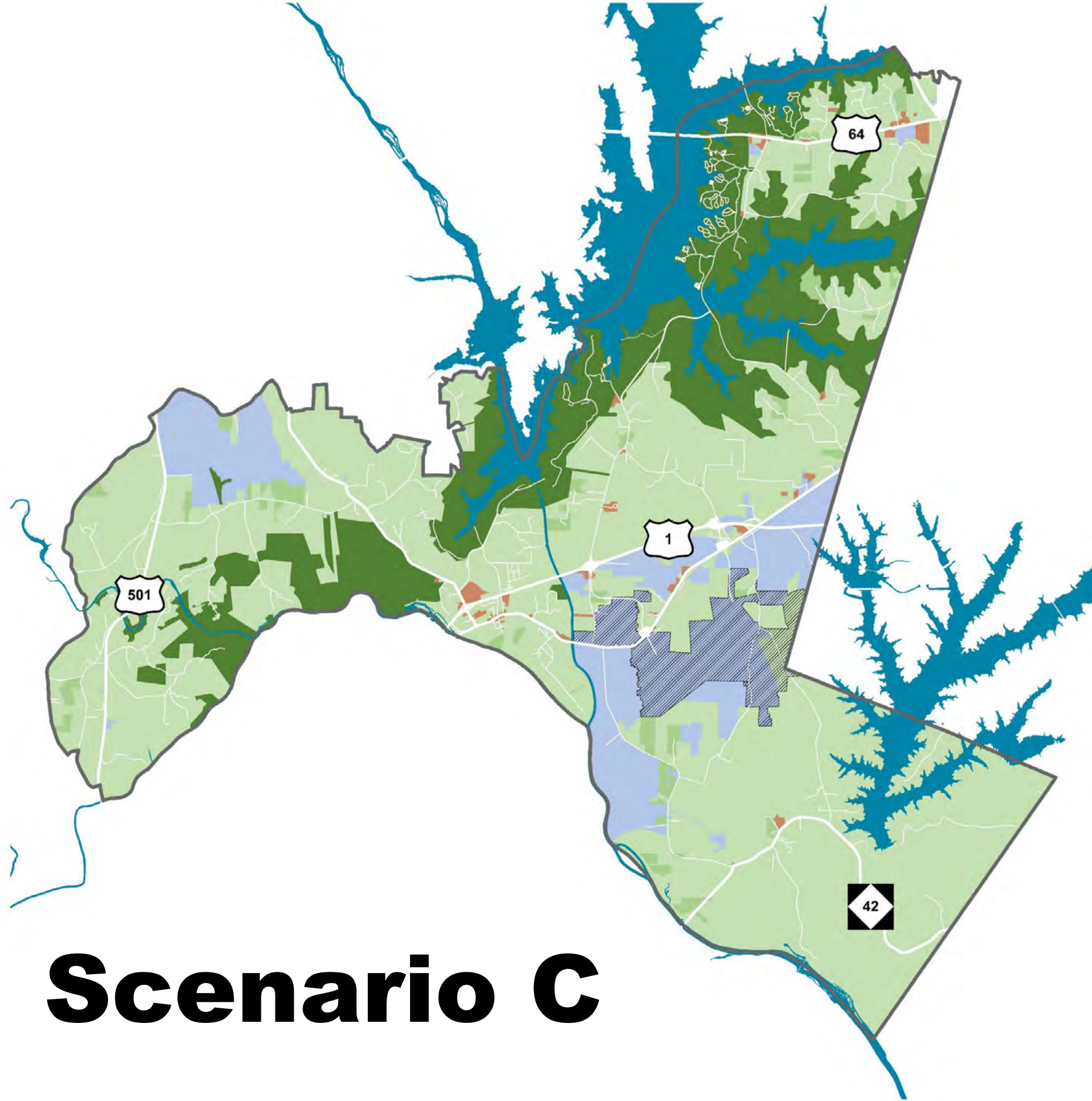
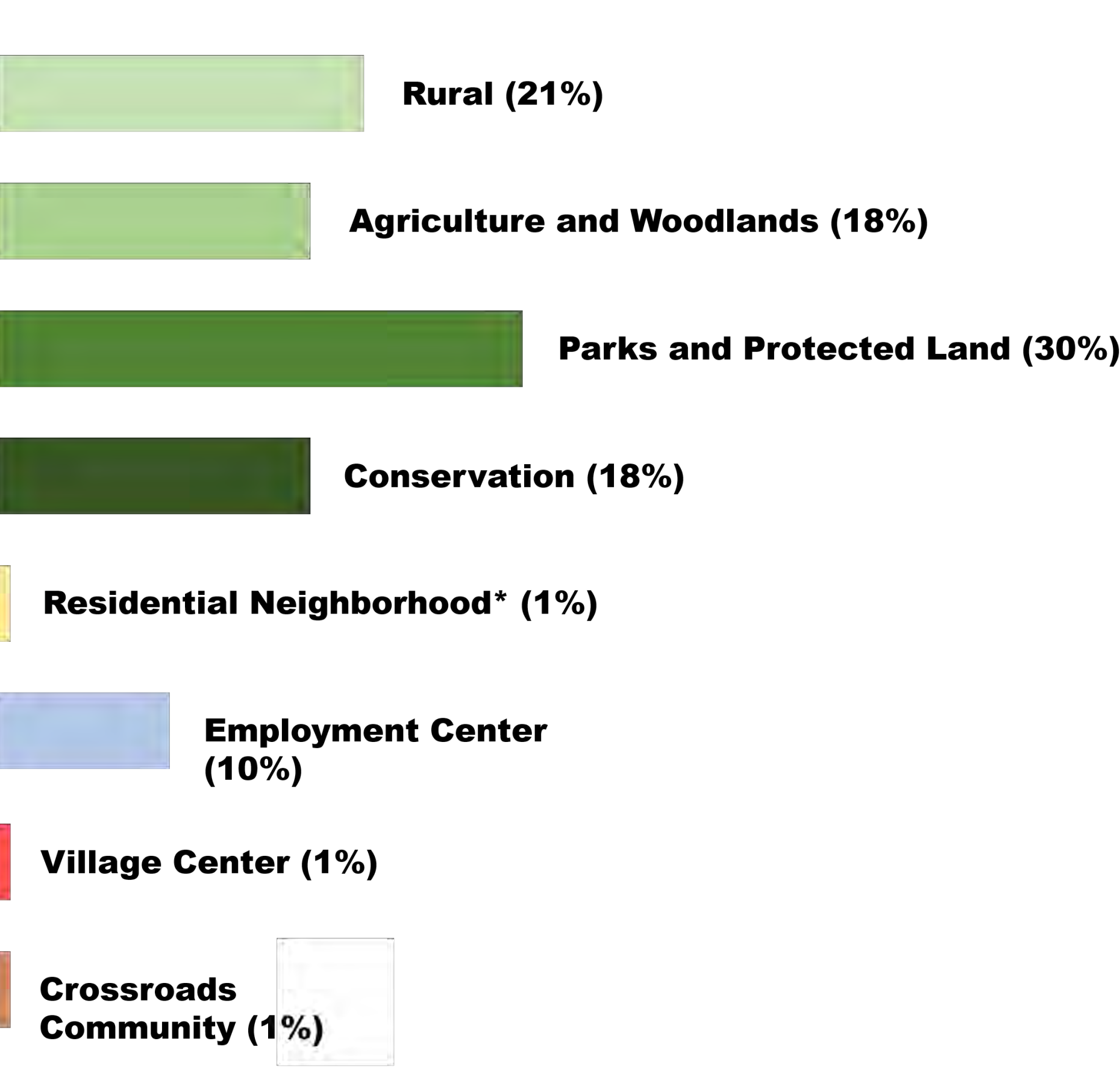


Scenario B

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.)

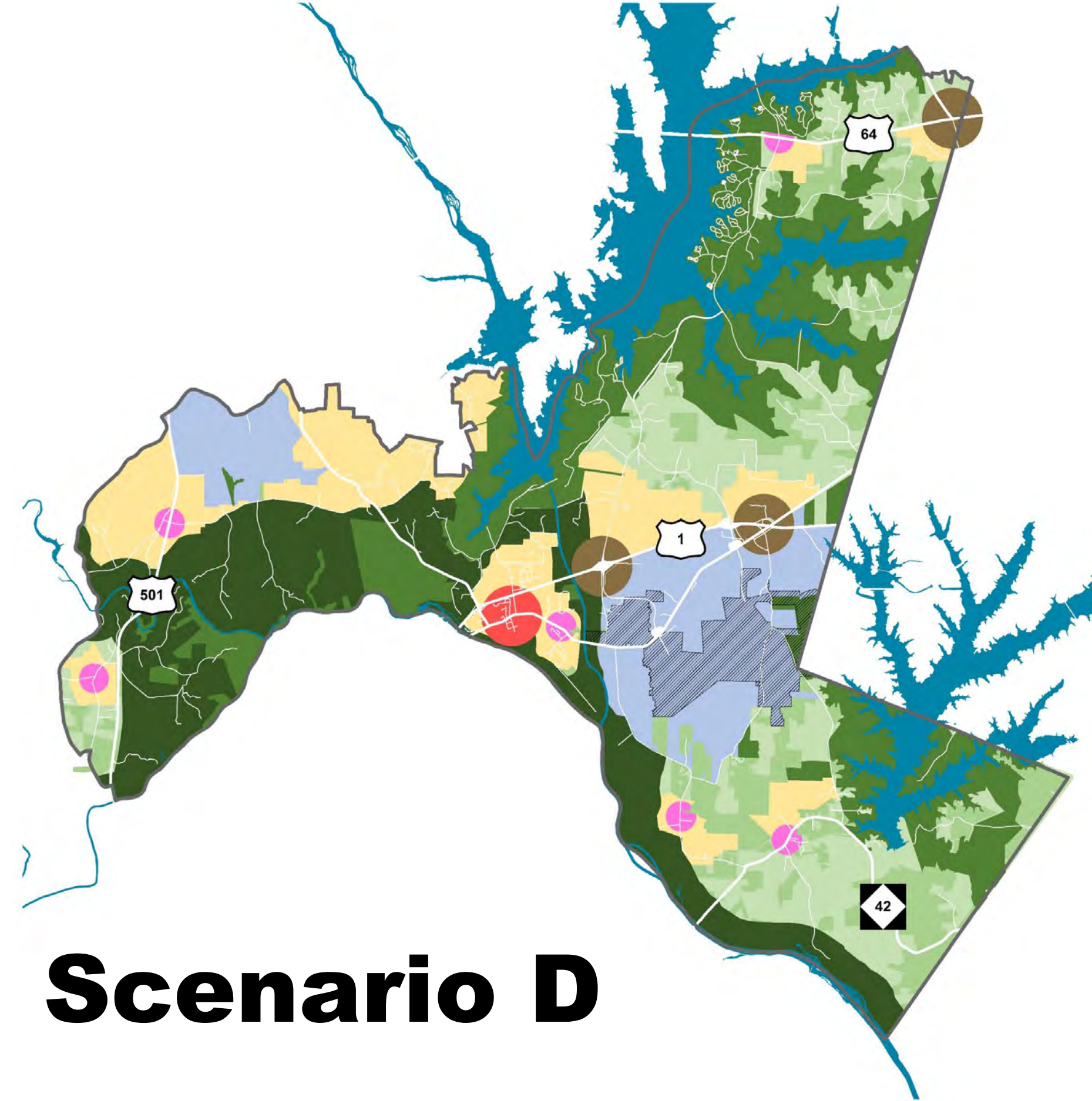
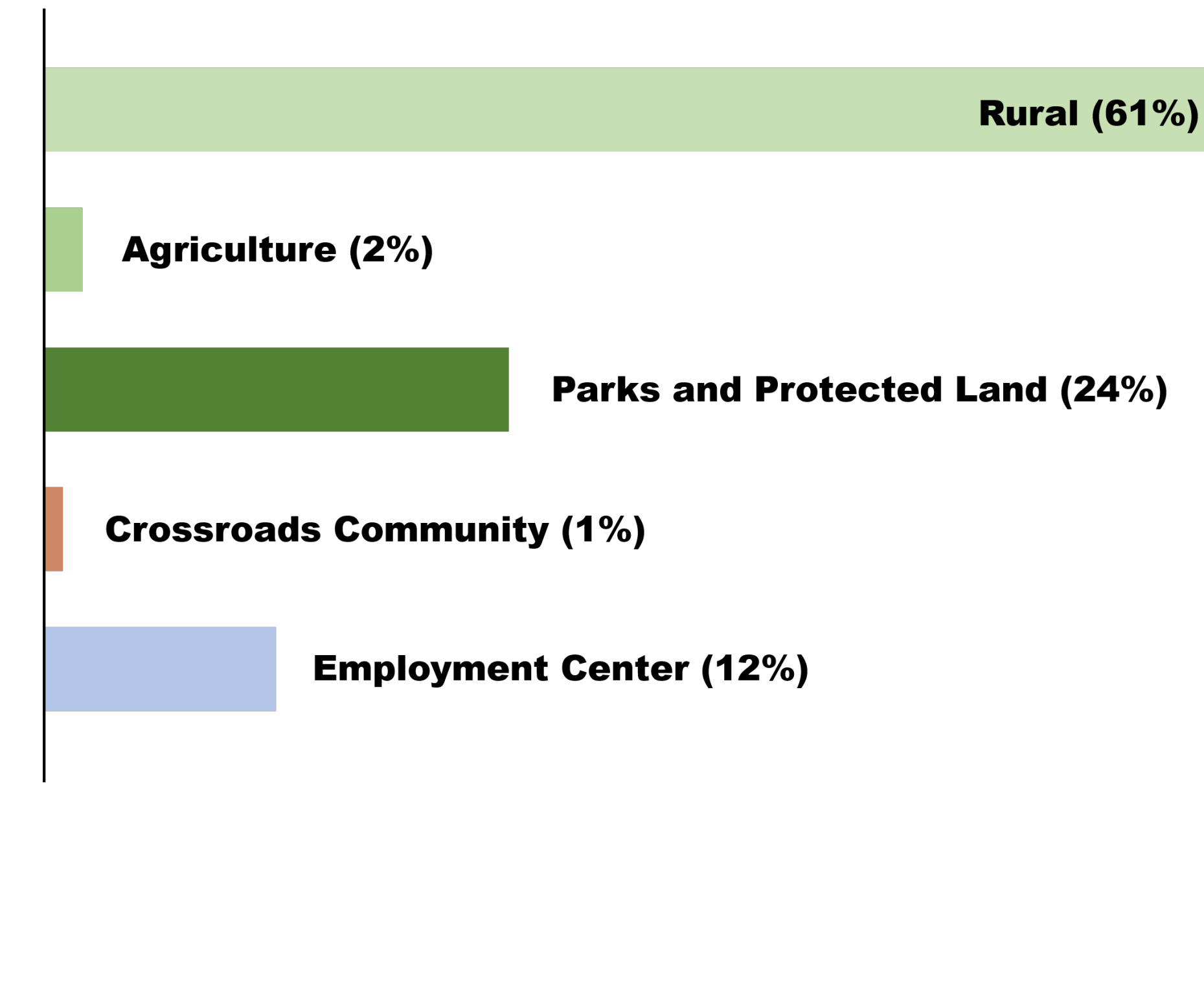


Scenario C

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.

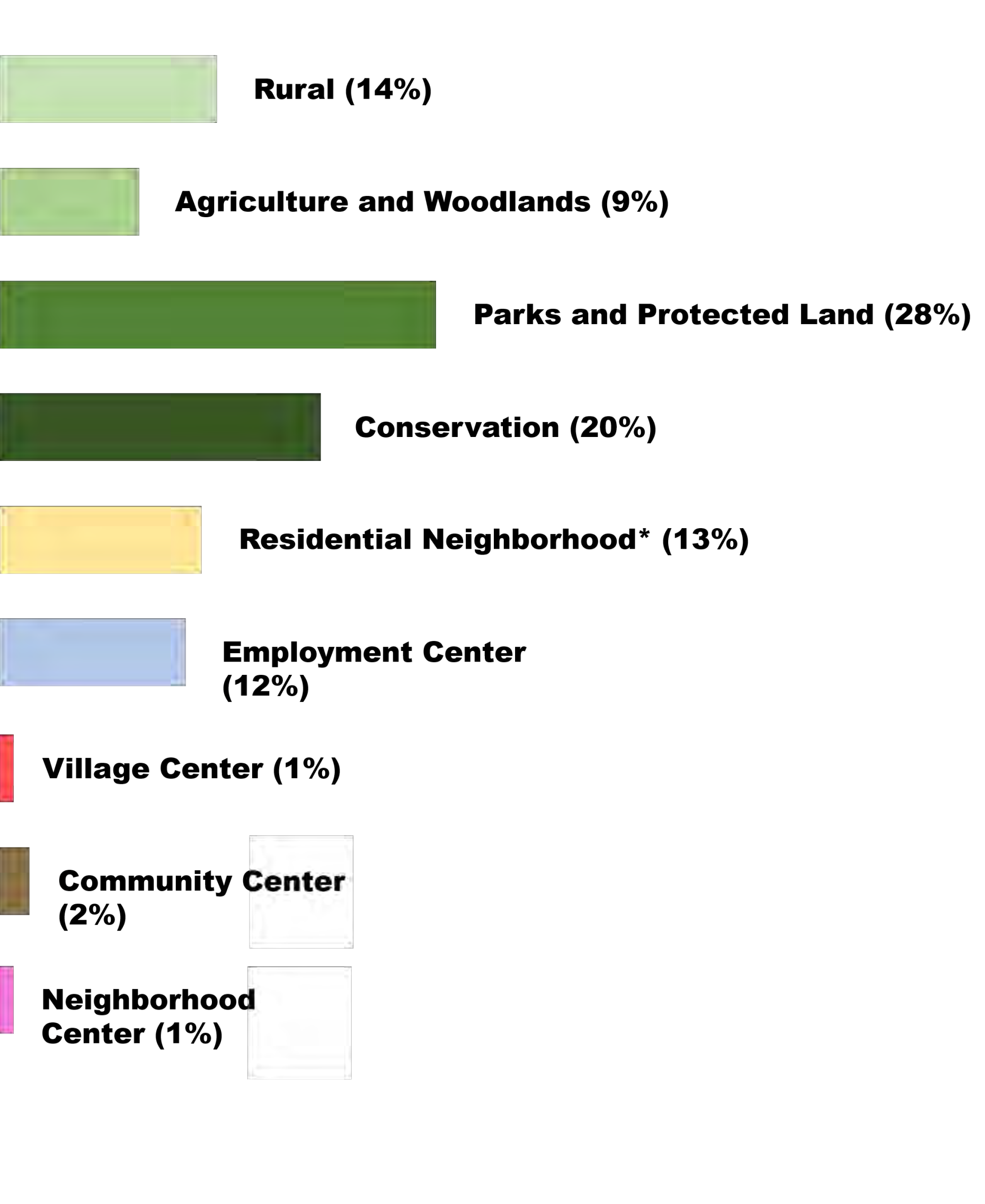


Scenario D

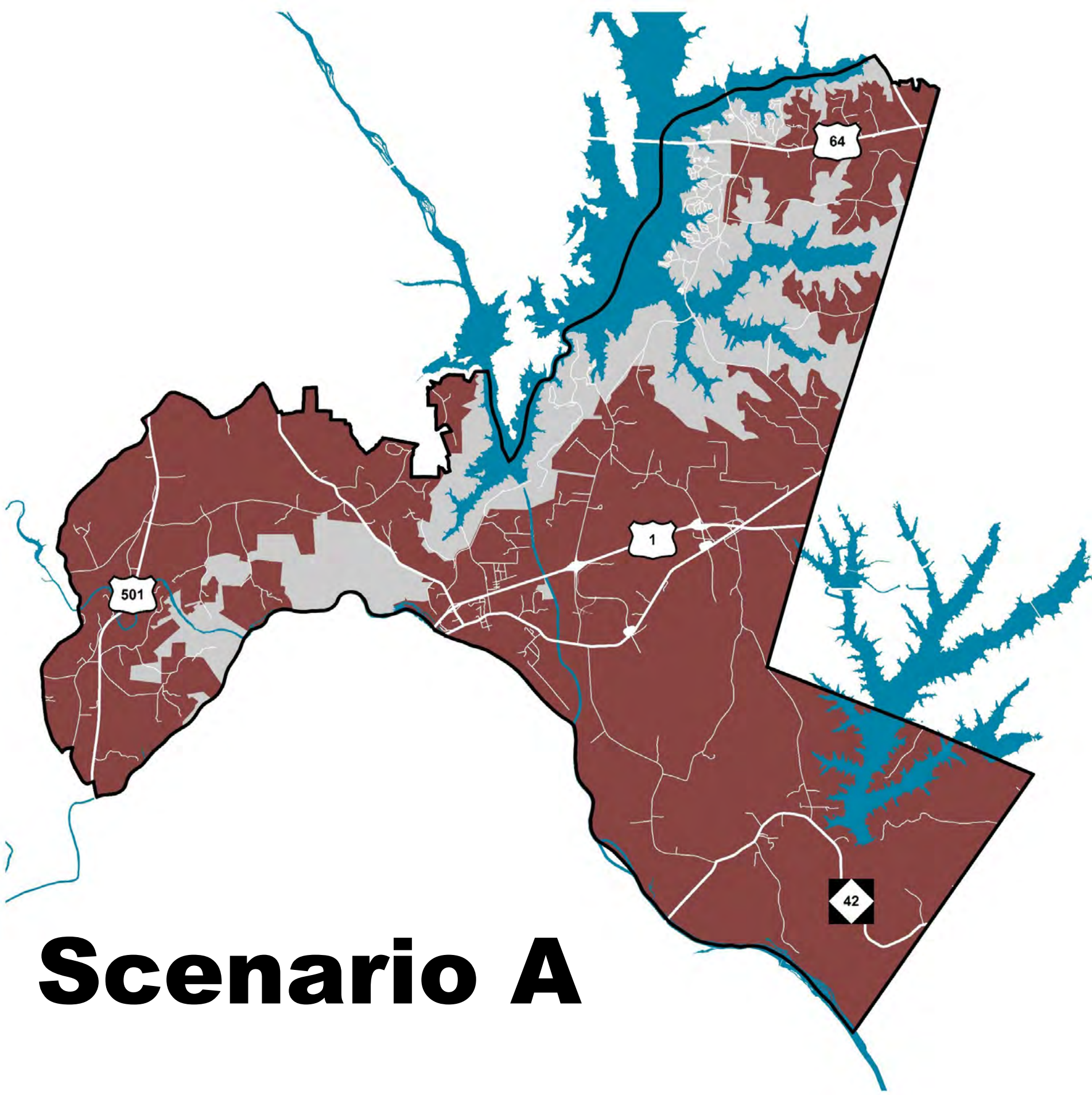
This scenario assumes a modest amount of new development but at higher levels than any of the other three scenarios. The projected growth would stay in Chatham County rather than being redirected to other places. To accommodate such development, this scenario would include a broader range of land uses, 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.



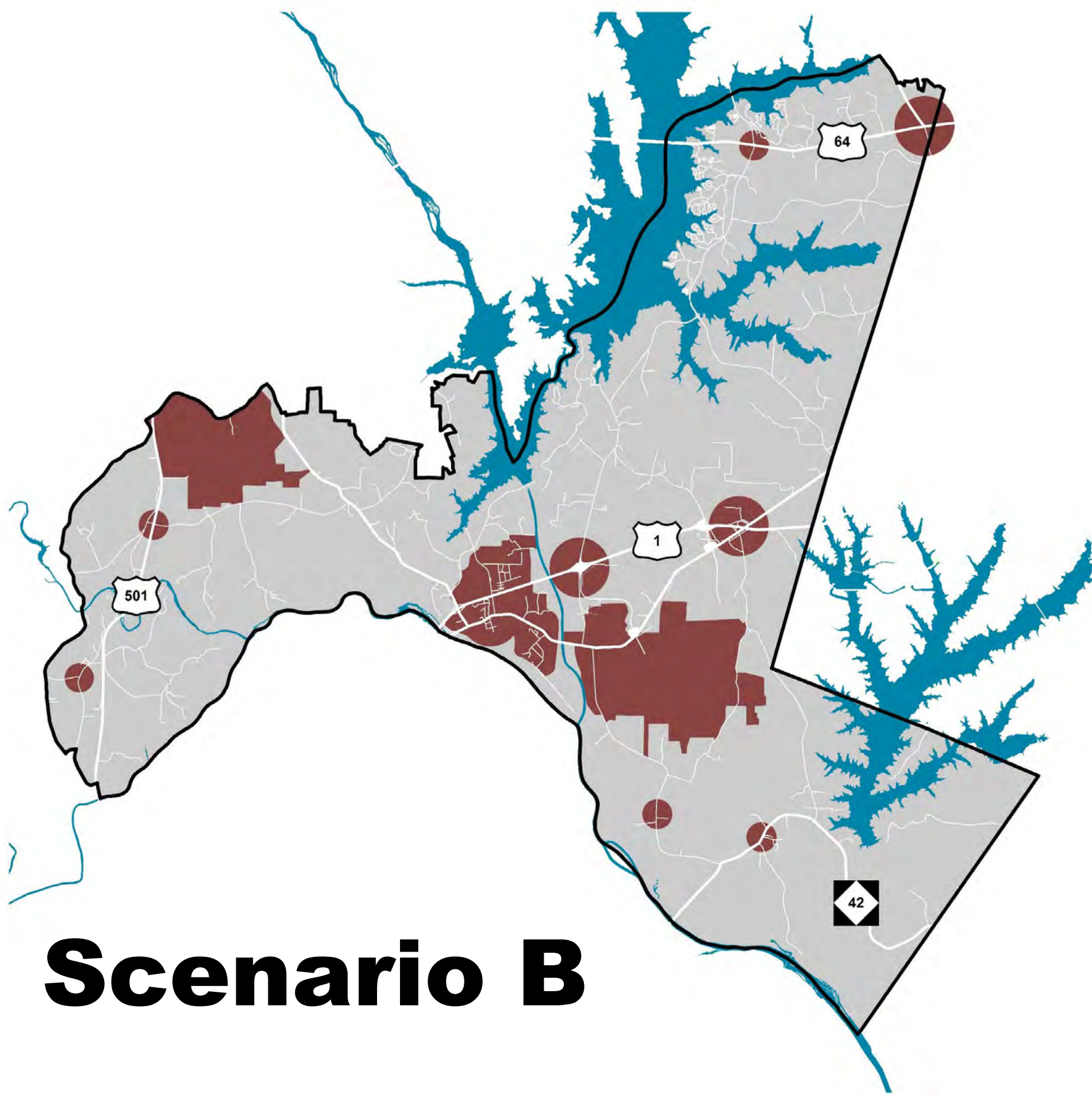
Side-by-Side Scenario Comparison: Intended Growth Areas



Scenario A

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.

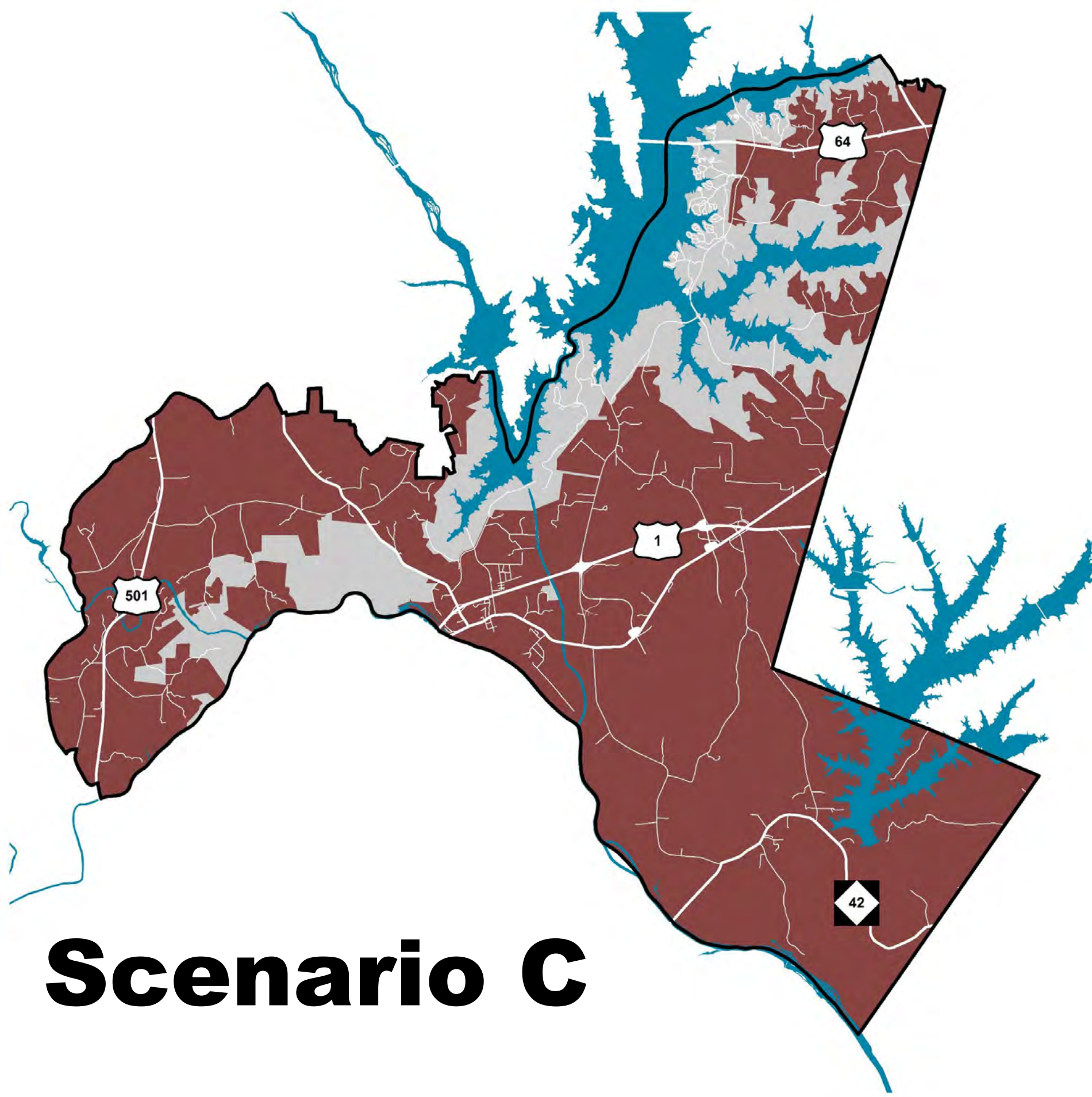
For Scenario A, all land outside of parks and permanently protected areas (indicated in dark red on the map) could develop in the future following strictly the official Chatham County Zoning Map and its associated rules, policies, and requirements. The large footprint of the intended growth area recognizes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



Scenario B

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.

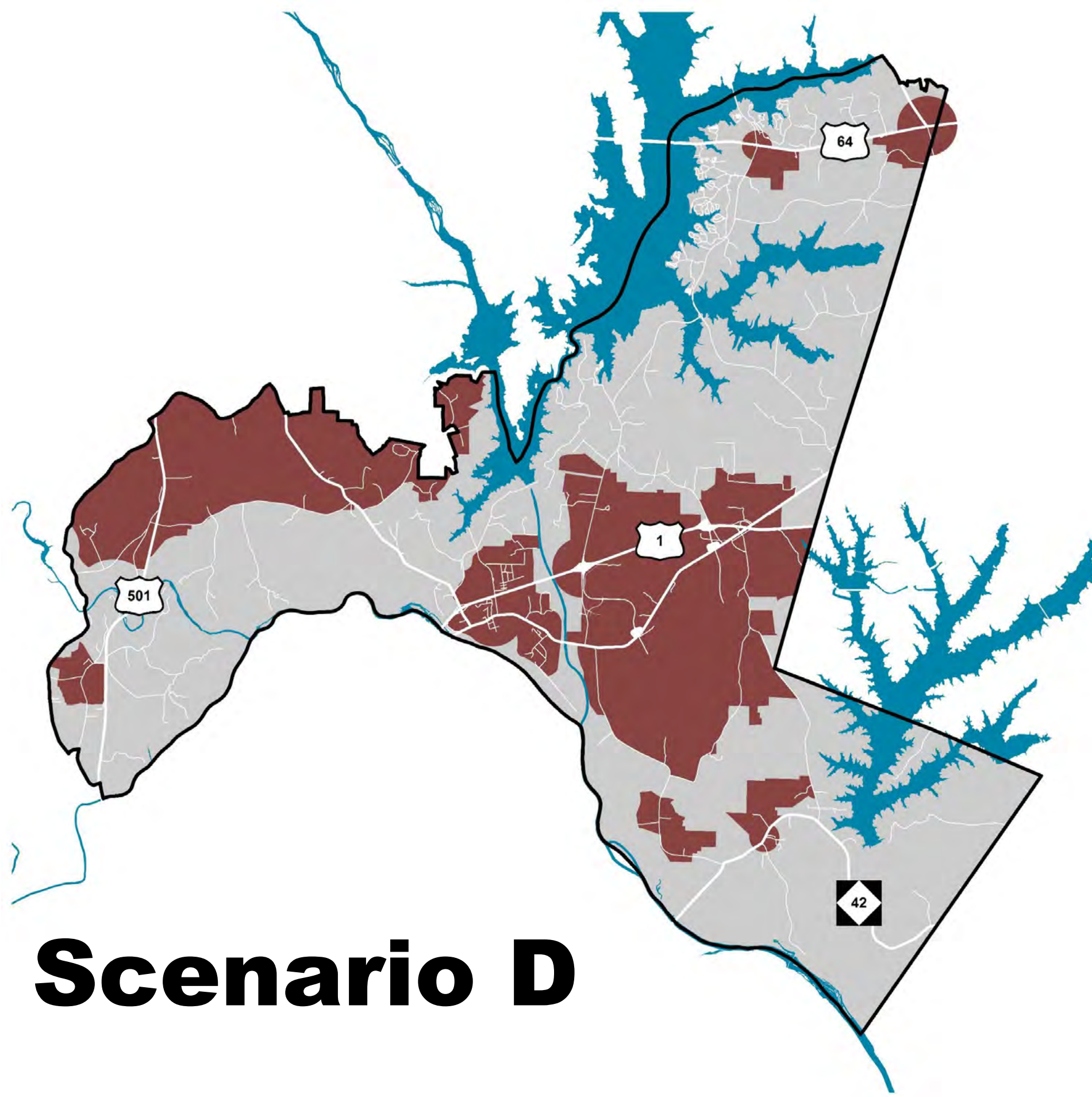
For Scenario B, all of the land inside a village center, community crossroads, employment center, or residential neighborhood place type area (indicated in dark red on the map) could develop in the future strictly following the vision and principles of the Plan Chatham Comprehensive Plan. The comprehensive 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.

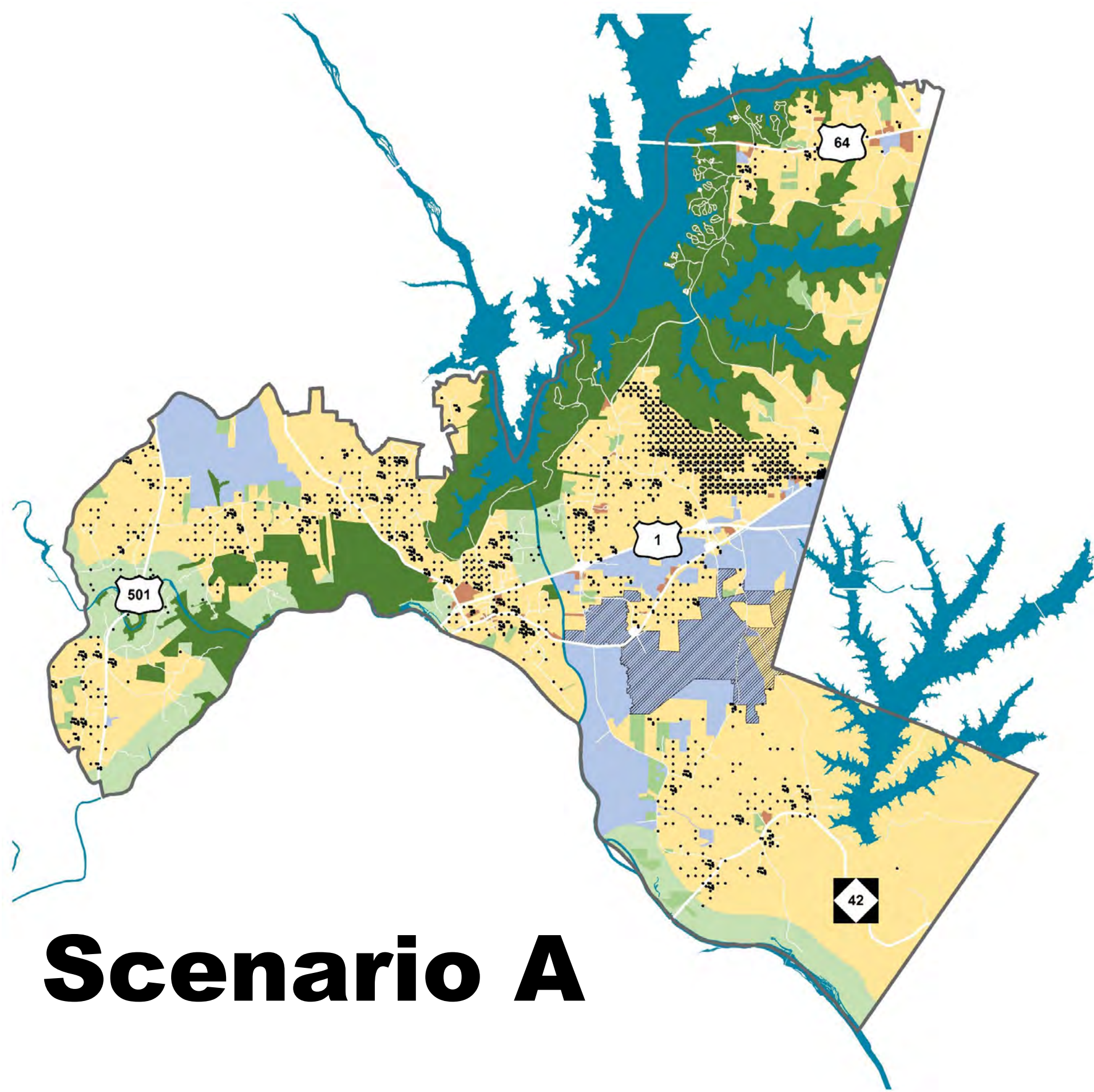


Scenario D

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.

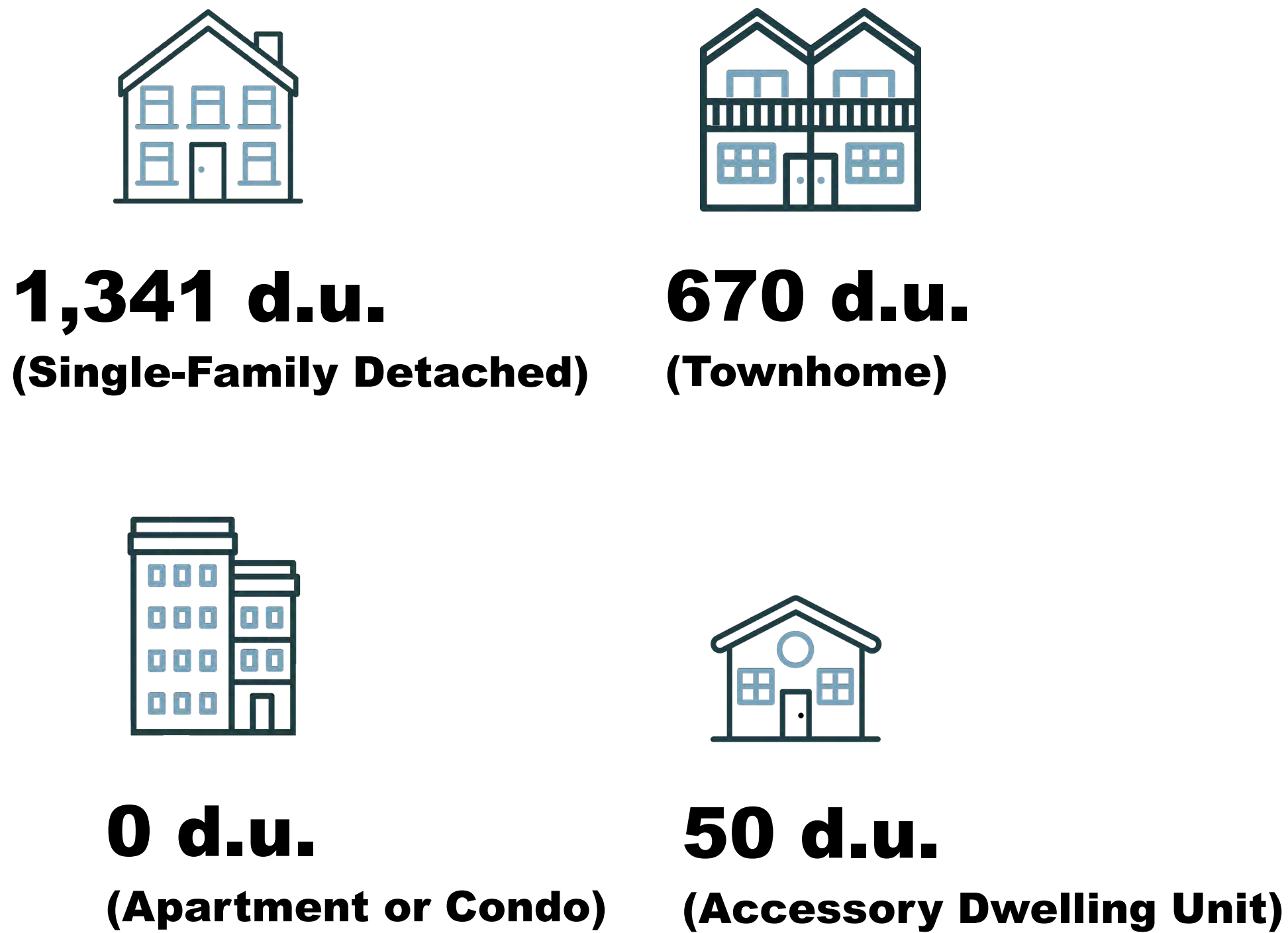
For Scenario D, all of the land inside a village center, community center, neighborhood center, employment center, or residential neighborhood place type area (indicated in dark red on the map) could develop in the future. These areas expand upon the vision and principles from of the Plan Chatham Comprehensive 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.

Side-by-Side Scenario Comparison: Residential Growth Allocation



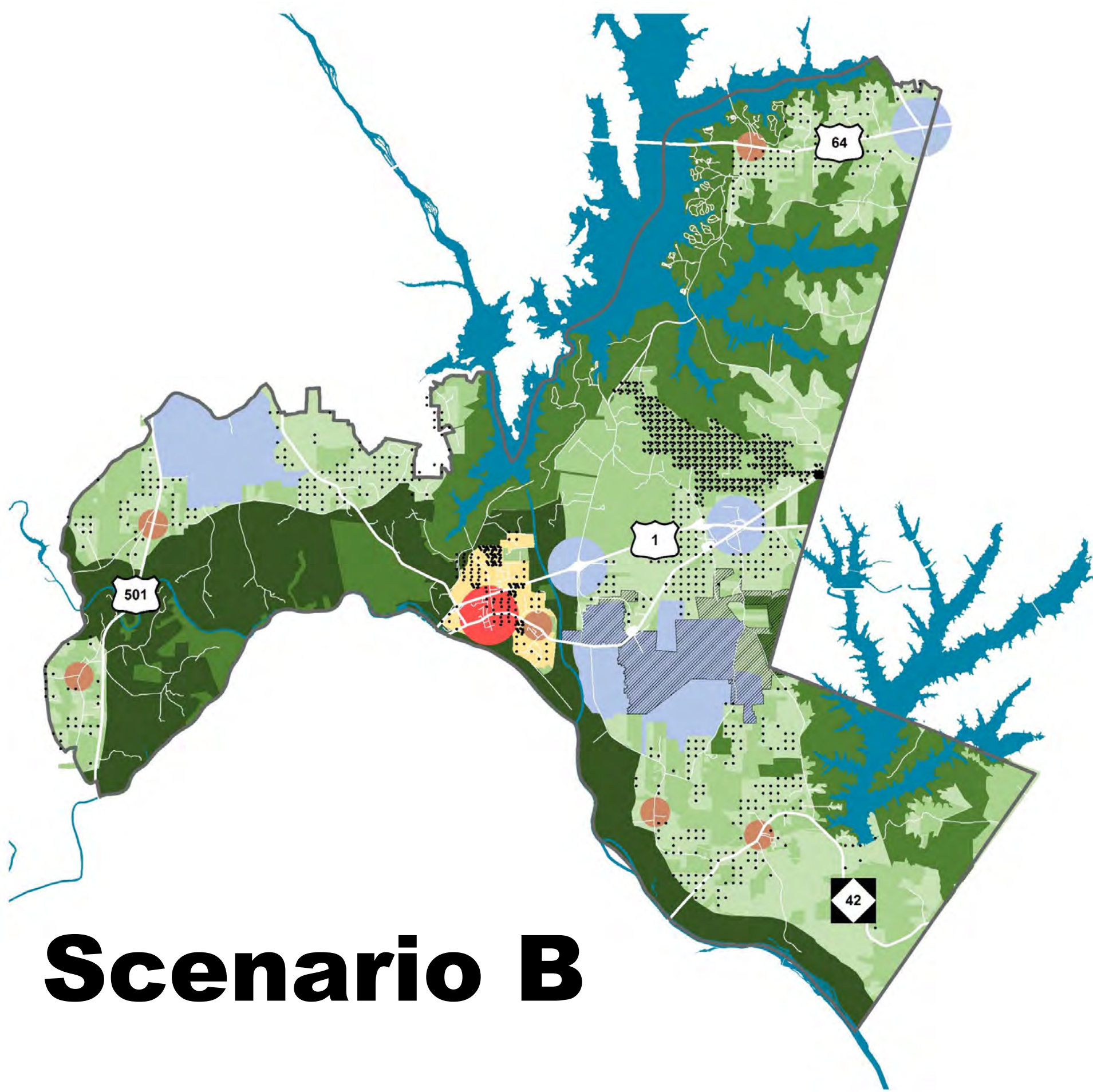
Scenario A

The distribution of new homes in the planning area includes two large committed developments: Conservancy at Jordan Lake and Savannah Ridge. Both projects were assumed to build out at 50% of their approved development programs by 2040. Additional single family detached homes (676) and townhomes (535) forecasted for the Study Area were distributed to southern portions of the planning area, including Corinth, Brickhaven, Moncure, Asbury, Merry Oaks, and the Moncure-Pittsboro Road corridor. Zero multifamily homes were allocated for the scenario because of limitations with current zoning districts present in the planning area (i.e., multifamily homes were not allowed). New multifamily homes would be built in surrounding communities, and residents would commute into the Moncure planning area to meet their daily needs.



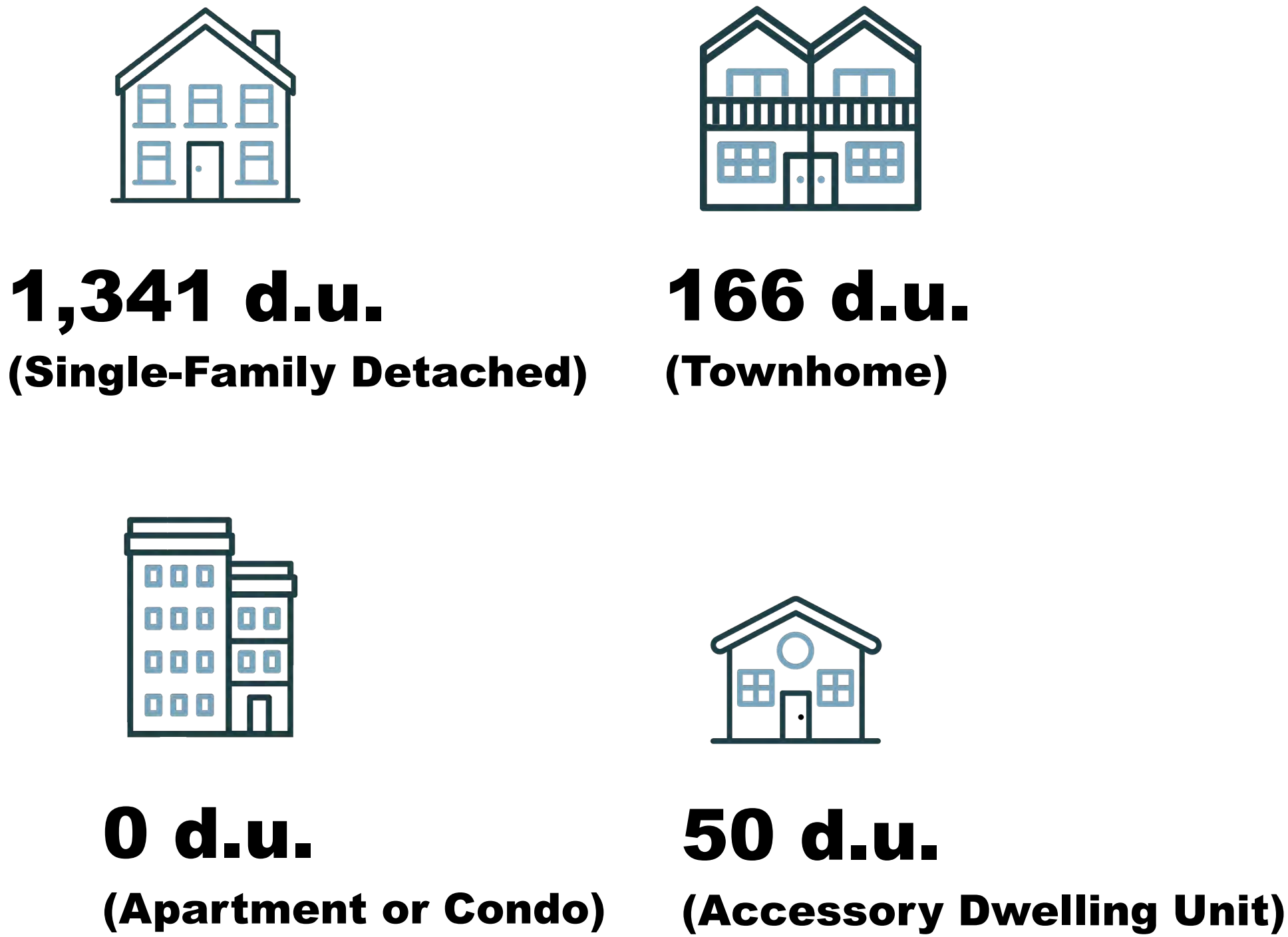
Map Legend

● One new dwelling unit allocated between 2023 and 2040



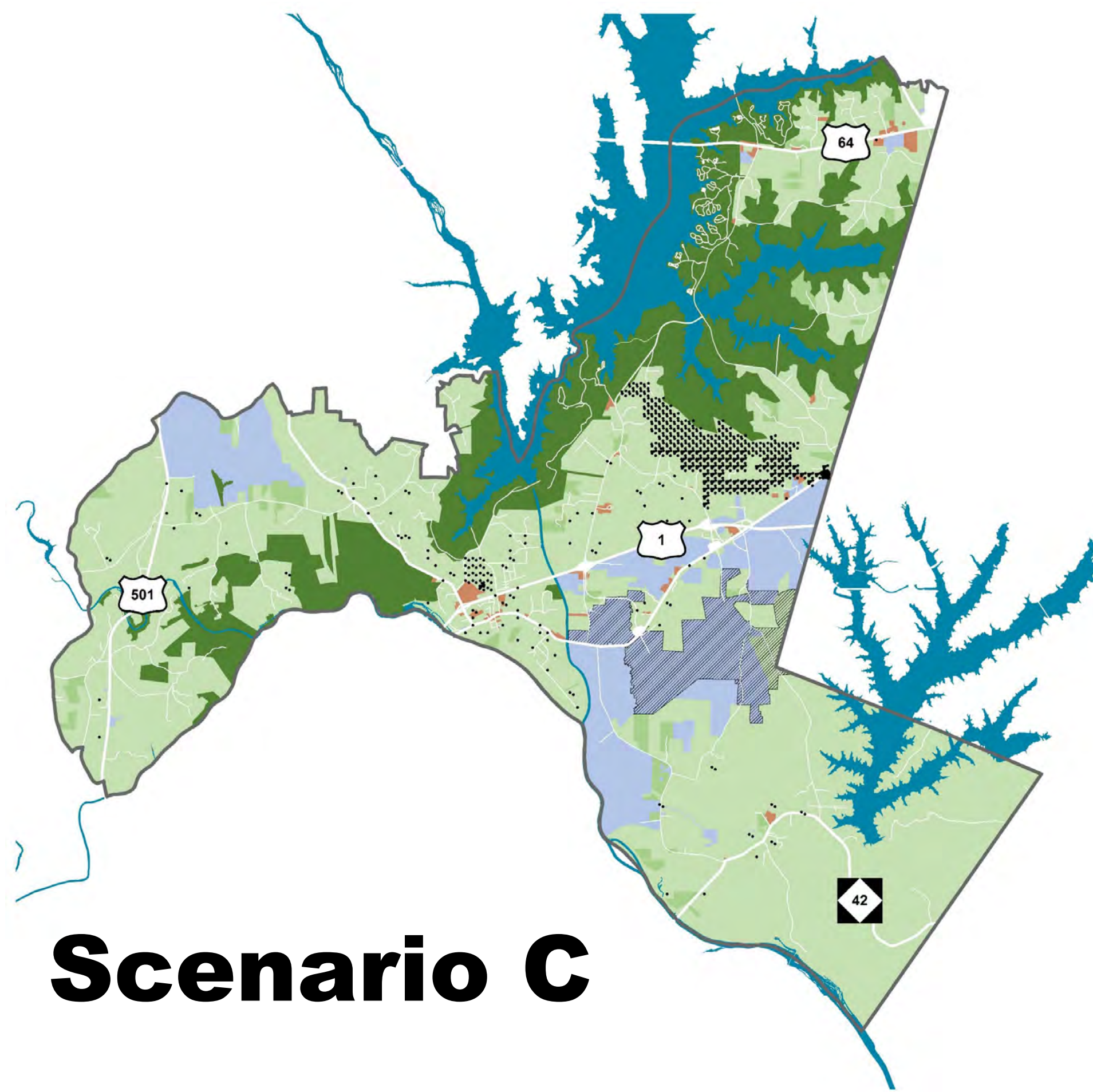
Scenario B

The distribution of new homes in the planning area includes two large committed developments: Conservancy at Jordan Lake and Savannah Ridge. Both projects were assumed to build out at 50% of their approved development programs by 2040. Additional single family detached homes (676) and townhomes (535) forecasted for the Study Area were distributed to northern and southern portions of the planning area, including Corinth, Brickhaven, Moncure, Asbury, Merry Oaks, Wilsonville, and the Moncure-Pittsboro Road and US 501 corridors. Zero multifamily homes were allocated for the scenario because of limitations with the place types from the Plan Chatham Comprehensive Plan present in the planning area (i.e., multifamily homes were not allowed). New multifamily homes would be built in surrounding communities, and residents would commute into the Moncure planning area to meet their daily needs.



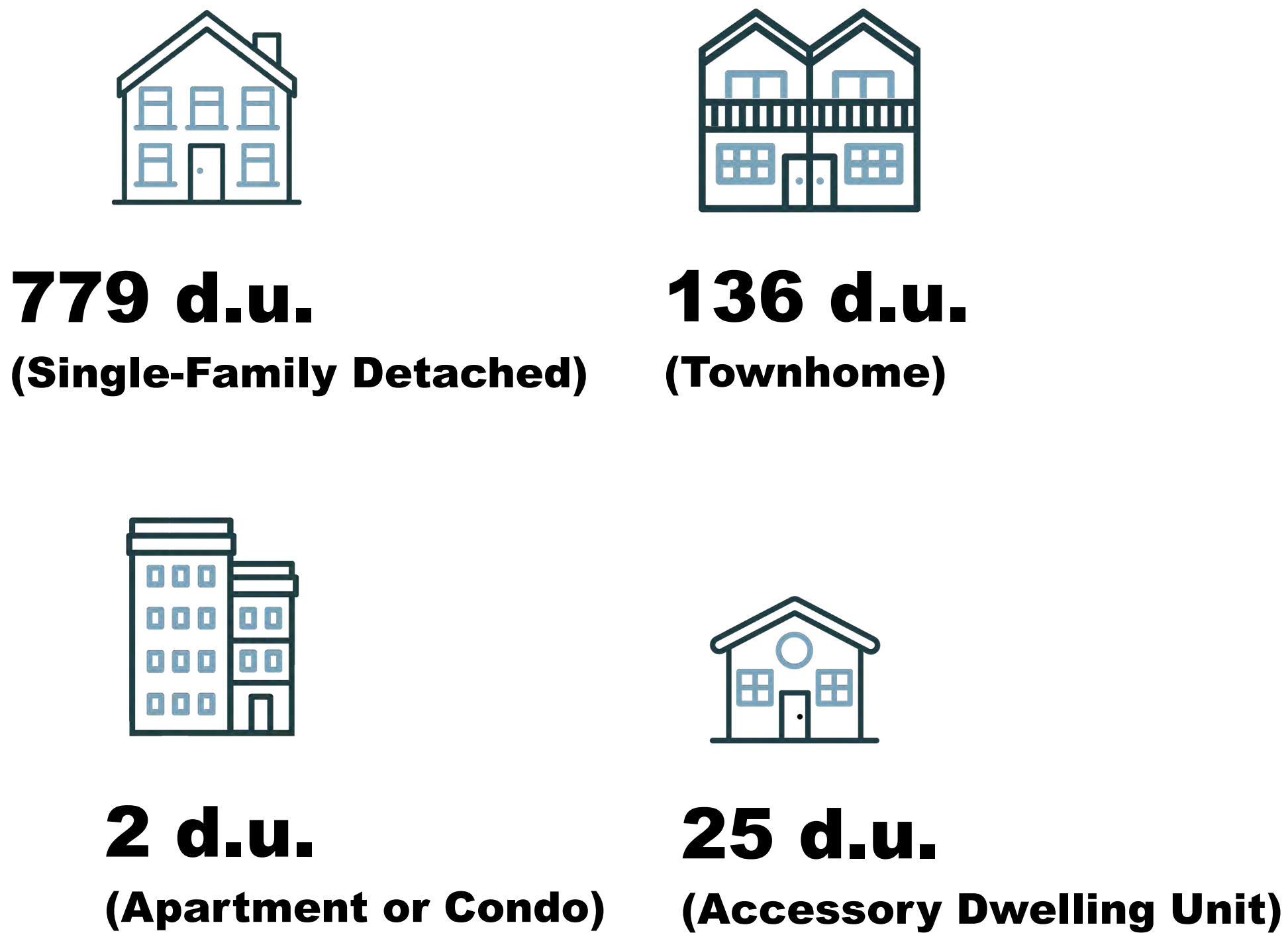
Map Legend

● One new dwelling unit allocated between 2023 and 2040



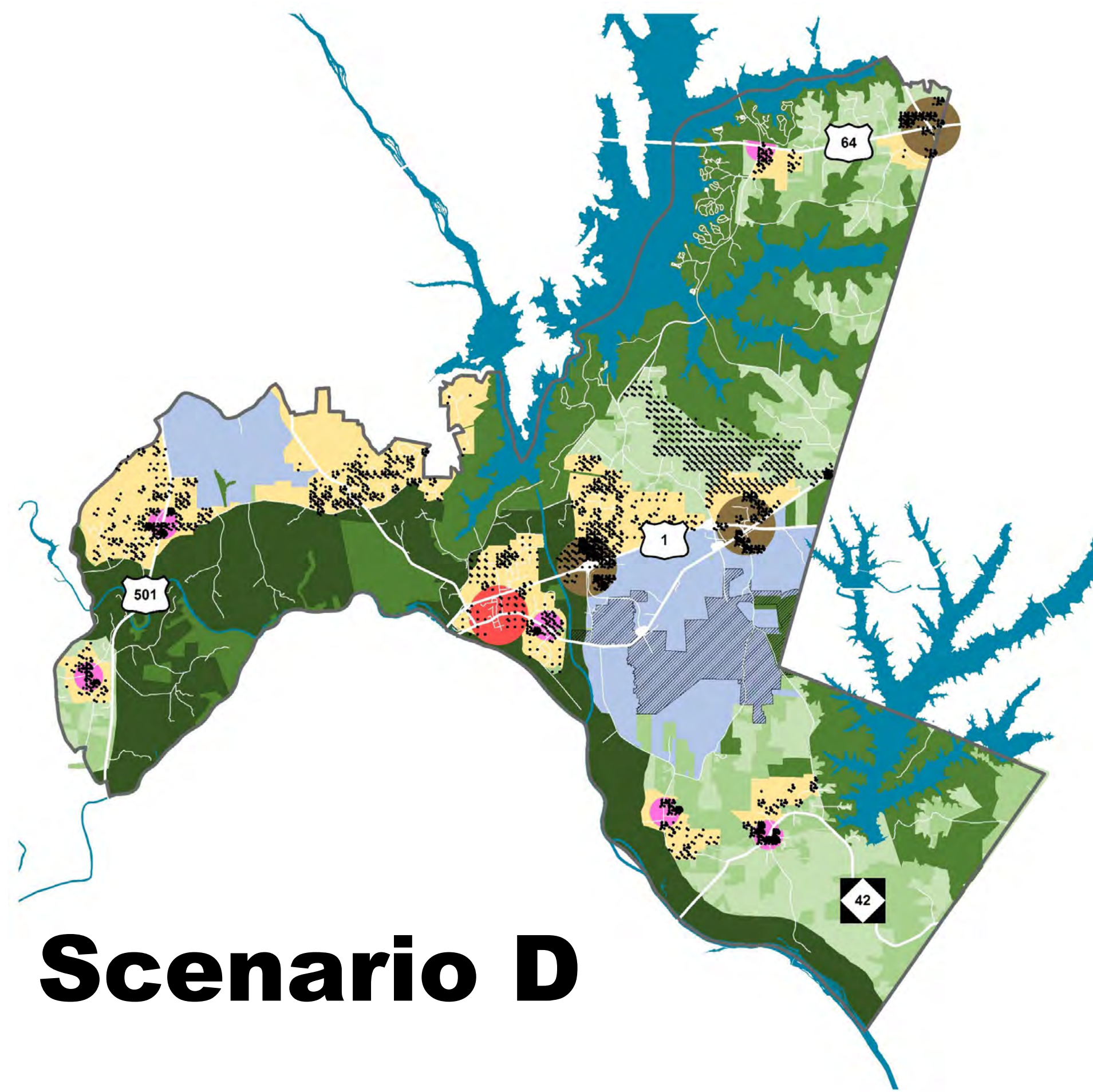
Scenario C

The distribution of new homes in the planning area includes two large committed developments: Conservancy at Jordan Lake and Savannah Ridge. Both projects were assumed to build out at 50% of their approved development programs by 2040. Additional single family detached homes (114) and townhomes (254) forecasted for the Study Area were distributed to southern portions of the planning area, including Corinth, Moncure, Merry Oaks, and the Moncure-Pittsboro Road corridor. Very few multifamily homes (2) were allocated for the scenario because of limitations with current zoning districts present in the planning area (i.e., multifamily homes were generally not allowed). Most new multifamily homes (387) would be built in surrounding communities, and residents would commute into the Moncure planning area to meet their daily needs.



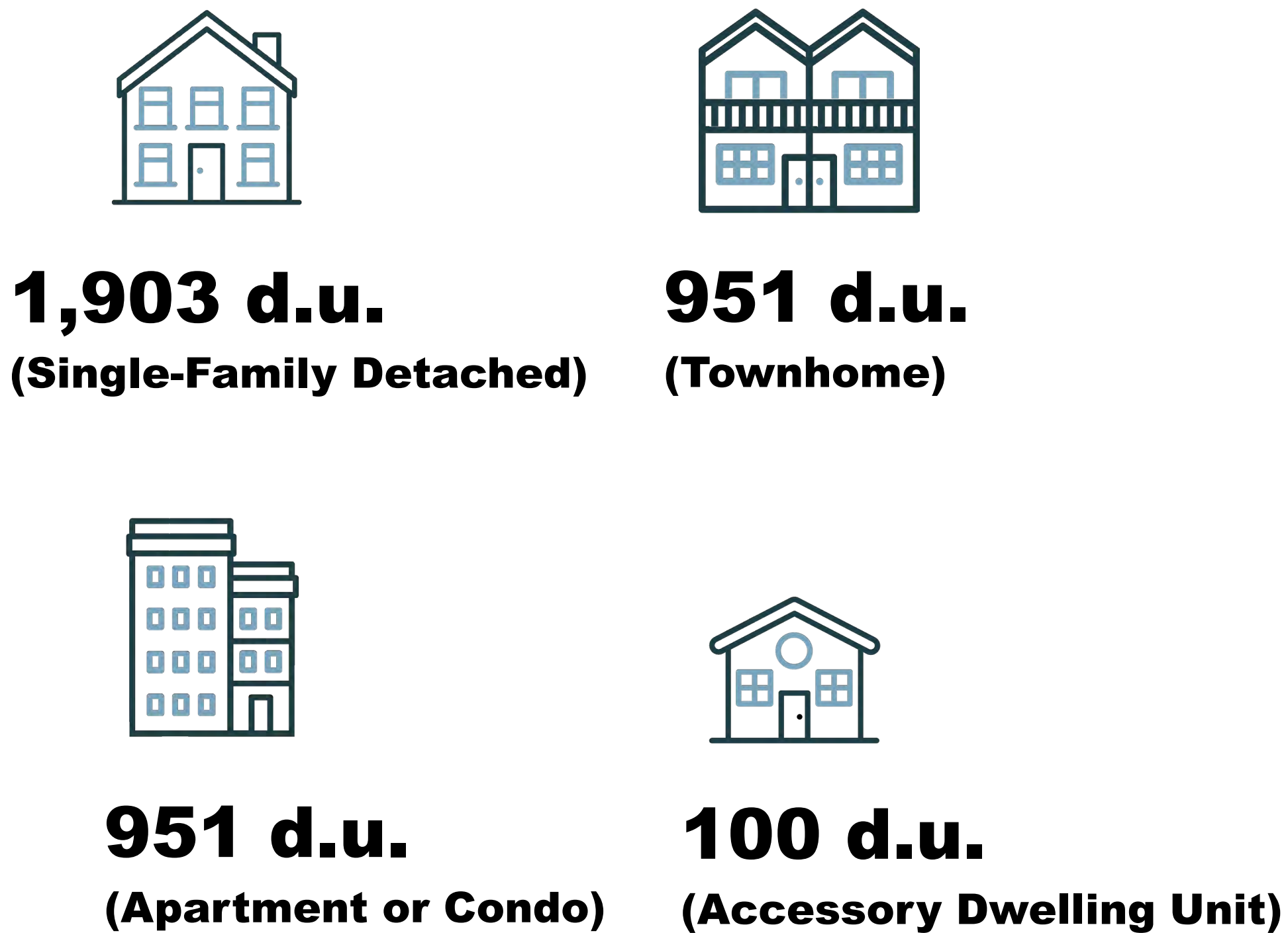
Map Legend

● One new dwelling unit allocated between 2023 and 2040



Scenario D

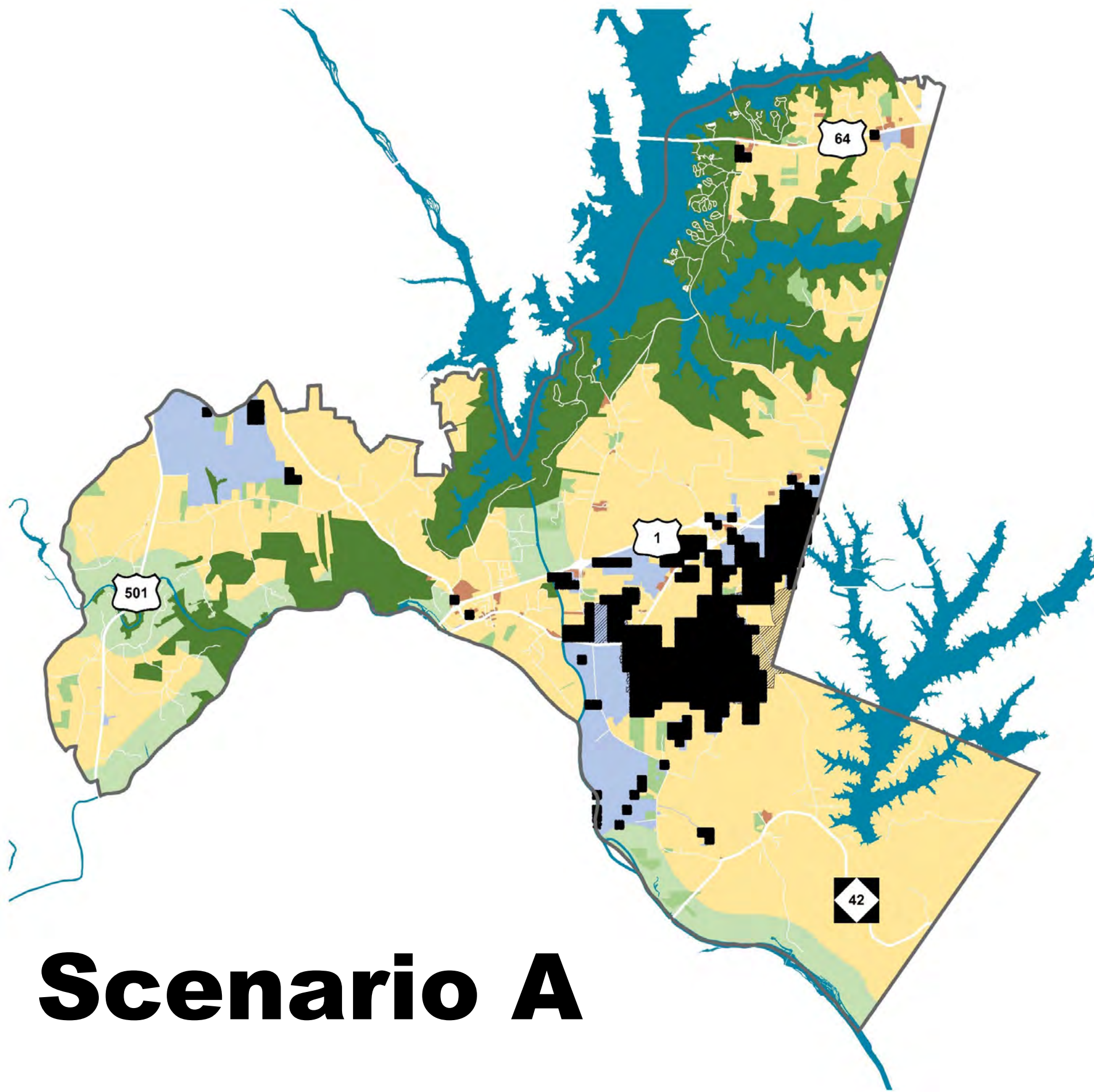
The distribution of new homes in the planning area includes two large committed developments: Conservancy at Jordan Lake and Savannah Ridge. Both projects were assumed to build out at 50% of their approved development programs by 2040. Additional single family detached homes (1,238), townhomes (816), and multifamily homes (951) forecasted for the Study Area were distributed to northern and southern portions of the planning area, including Corinth, Brickhaven, Moncure, Asbury, Merry Oaks, Wilsonville, and the Moncure Pittsboro Road and US 501 corridors. This is the only scenario evaluated for the Moncure planning area that accommodates full market demand for residential development in 2040.



Map Legend

● One new dwelling unit allocated between 2023 and 2040

Side-by-Side Scenario Comparison: Non-Residential Growth Allocation



Scenario A

The distribution of new non-residential building square feet in the planning area includes three large industrial committed developments: VinFast Manufacturing, FedEx, and St. Wooten Concrete Batch Plant. A small retail building, for a Chatham County ABC store, is also included in the committed development inventory. Additional retail (60,978 sq. ft.), office (18,459 sq. ft.), and industrial (4,966,234 sq. ft.) development for the Study Area were largely distributed to Triangle Innovation Point and its immediate surrounding area. Small pockets of non-residential development were also allocated to Moncure, Wilsonville, and the Moncure-Pittsboro Road corridor near Chatham Park. Shortfalls with meeting demand for the full retail (24,022) and office (24,401) forecasts in 2040 means some non-residential development would be built in surrounding communities, and residents would commute out of the Moncure planning area to meet their daily needs.



+60,978 s.f.
(Retail)



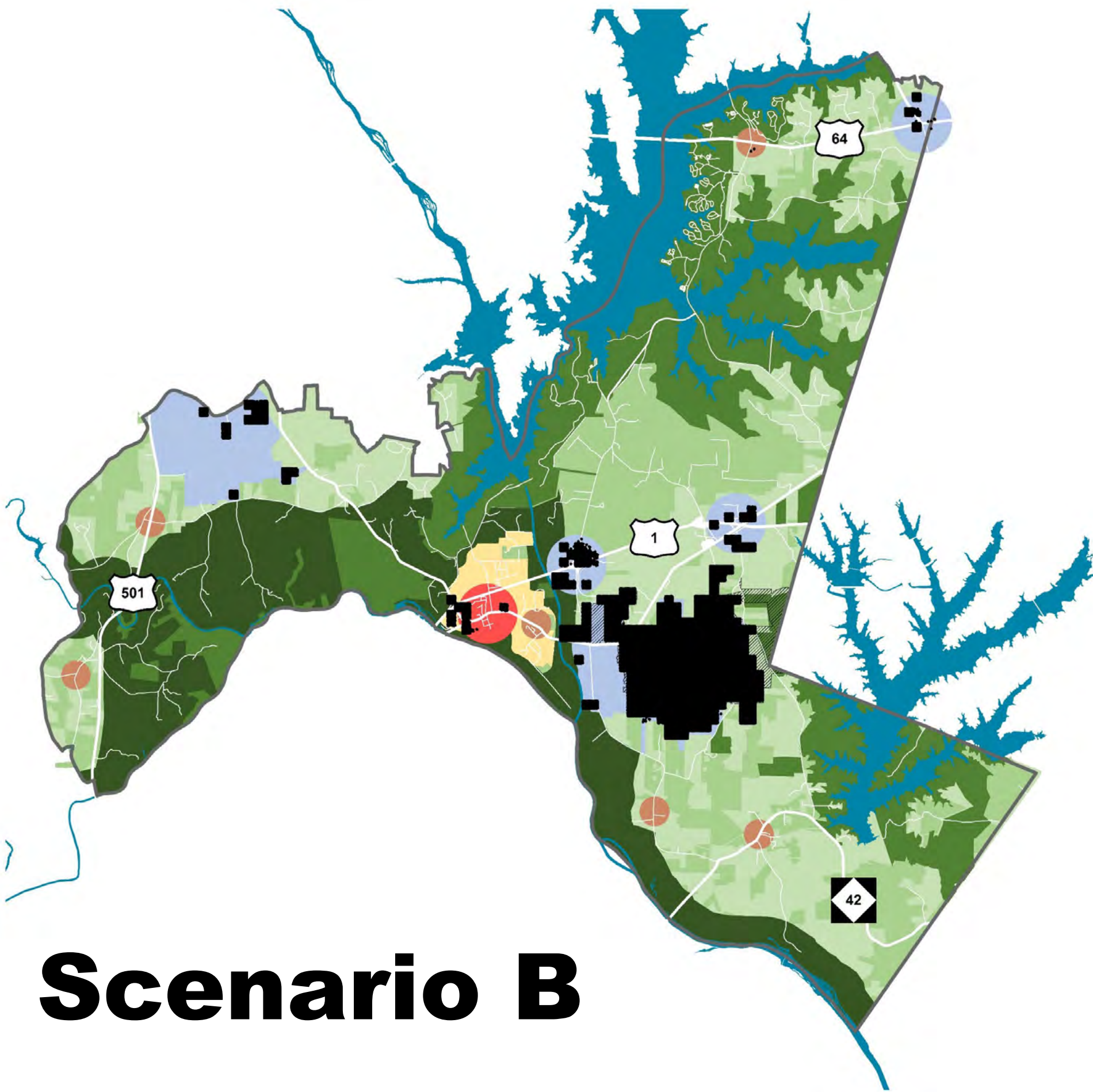
+18,459 s.f.
(Office)



+4,966,234 s.f.
(Industrial)

Map Legend

● One new square foot of non-residential development allocated between 2023 and 2040



Scenario B

The distribution of new non-residential building square feet in the planning area includes three large industrial committed developments: VinFast Manufacturing, FedEx, and St. Wooten Concrete Batch Plant. A small retail building, for a Chatham County ABC store, is also included in the committed development inventory. Additional retail (85,000 sq. ft.), office (42,500 sq. ft.), and industrial (4,966,234 sq. ft.) development for the Study Area were largely distributed to Triangle Innovation Point and its immediate surrounding area. Pockets of non-residential development were also allocated to Moncure, the two interchanges along the US 1 corridor, the US 64 corridor, and the Moncure-Pittsboro Road corridor near Chatham Park. The scenario accommodates full market demand for non-residential development in 2040.



+85,000 s.f.
(Retail)



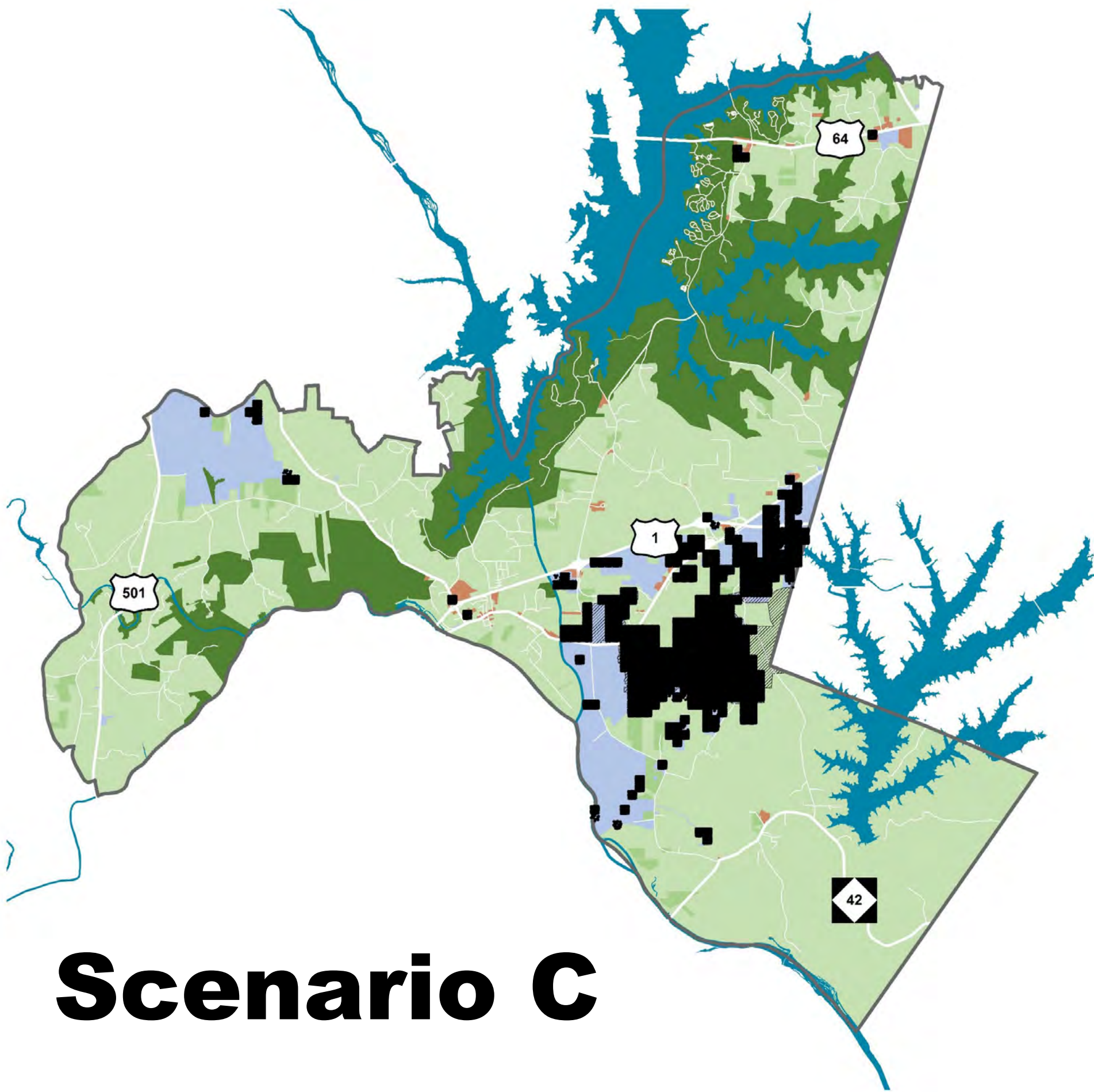
+42,500 s.f.
(Office)



+4,966,234 s.f.
(Industrial)

Map Legend

● One new square foot of non-residential development allocated between 2023 and 2040



Scenario C

The distribution of new non-residential building square feet in the planning area includes three large industrial committed developments: VinFast Manufacturing, FedEx, and St. Wooten Concrete Batch Plant. A small retail building, for a Chatham County ABC store, is also included in the committed development inventory. Additional retail (42,500 sq. ft.), office (17,000 sq. ft.), and industrial (4,116,234 sq. ft.) development for the Study Area were largely distributed to Triangle Innovation Point and its immediate surrounding area. Pockets of non-residential development were also allocated to Corinth, Moncure, the Cornith Road corridor, the US 64 corridor, and the Moncure-Pittsboro Road corridor near Chatham Park. The scenario accommodates full market demand for non-residential development in 2040.



+42,500 s.f.
(Retail)



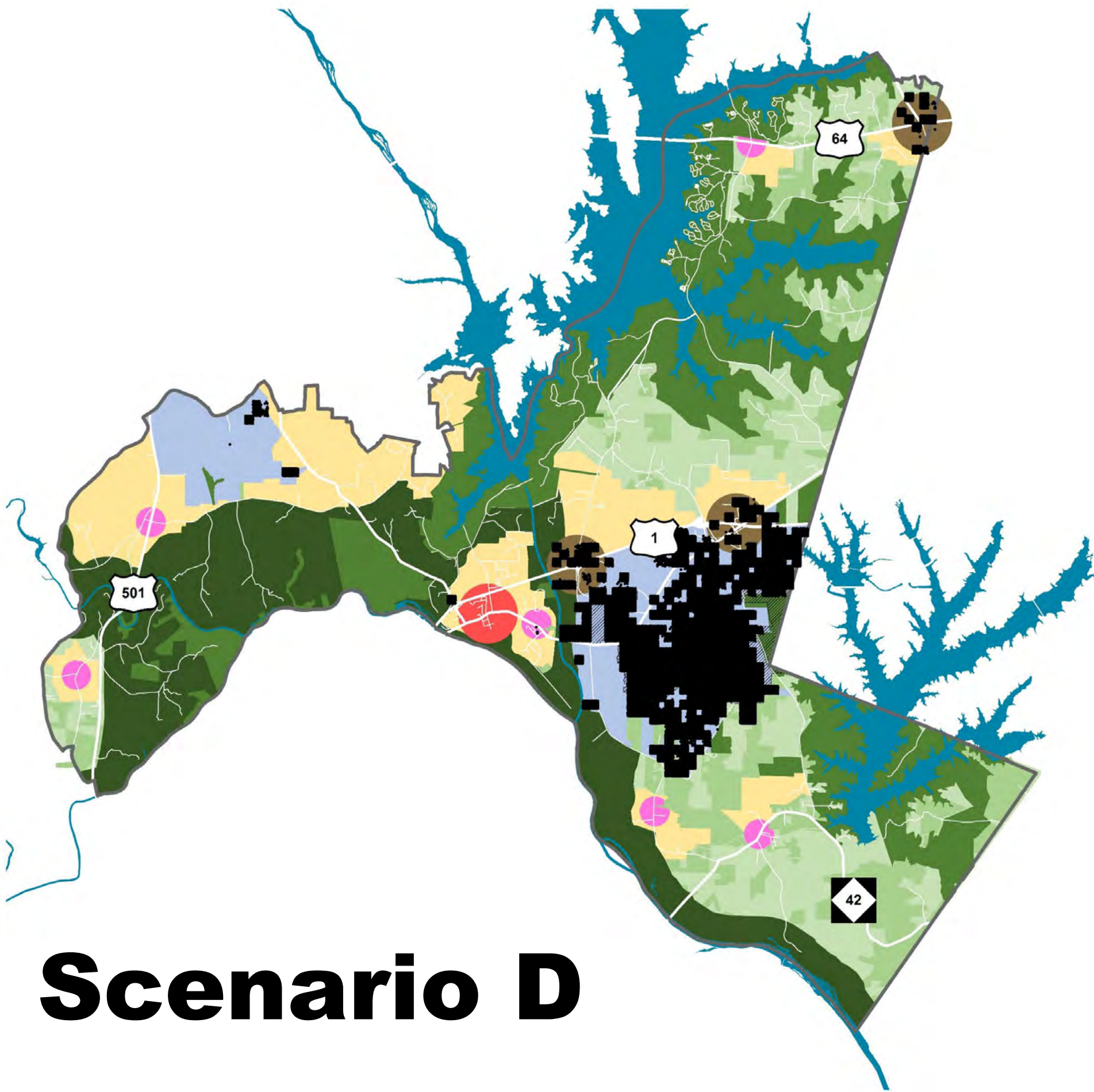
+17,000 s.f.
(Office)



+4,116,234 s.f.
(Industrial)

Map Legend

● One new square foot of non-residential development allocated between 2023 and 2040



Scenario D

The distribution of new non-residential building square feet in the planning area includes three large industrial committed developments: VinFast Manufacturing, FedEx, and St. Wooten Concrete Batch Plant. A small retail building, for a Chatham County ABC store, is also included in the committed development inventory. Additional retail (254,800 sq. ft.), office (127,500 sq. ft.), and industrial (7,516,234 sq. ft.) development for the Study Area were largely distributed to Triangle Innovation Point and its immediate surrounding area. Pockets of non-residential development were also allocated to Moncure, the US 64 corridor, and the Moncure-Pittsboro Road corridor near Chatham Park. The scenario accommodates full market demand for non-residential development in 2040.



+254,800 s.f.
(Retail)



+127,500 s.f.
(Office)

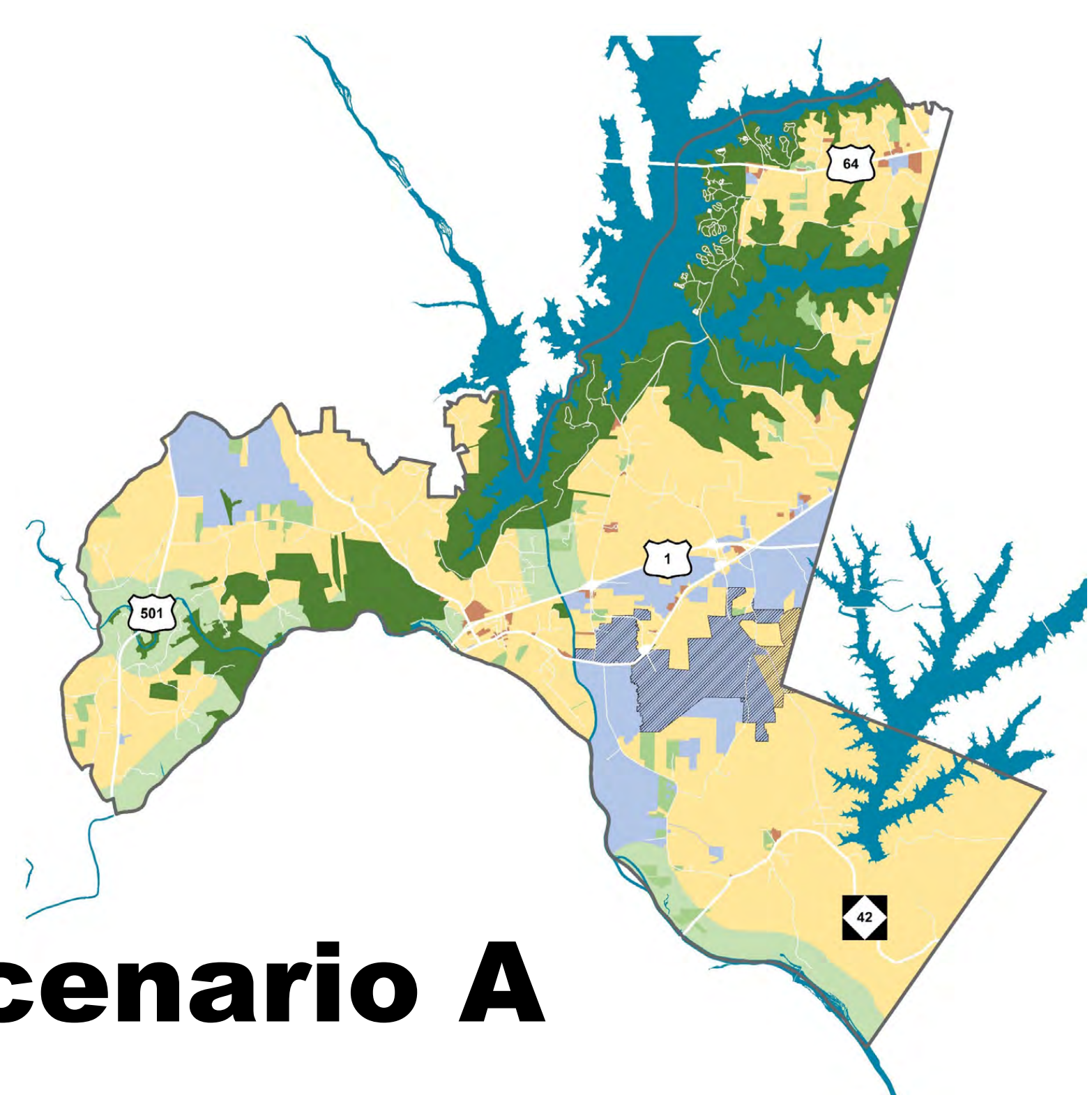


+7,516,234 s.f.
(Industrial)

Map Legend

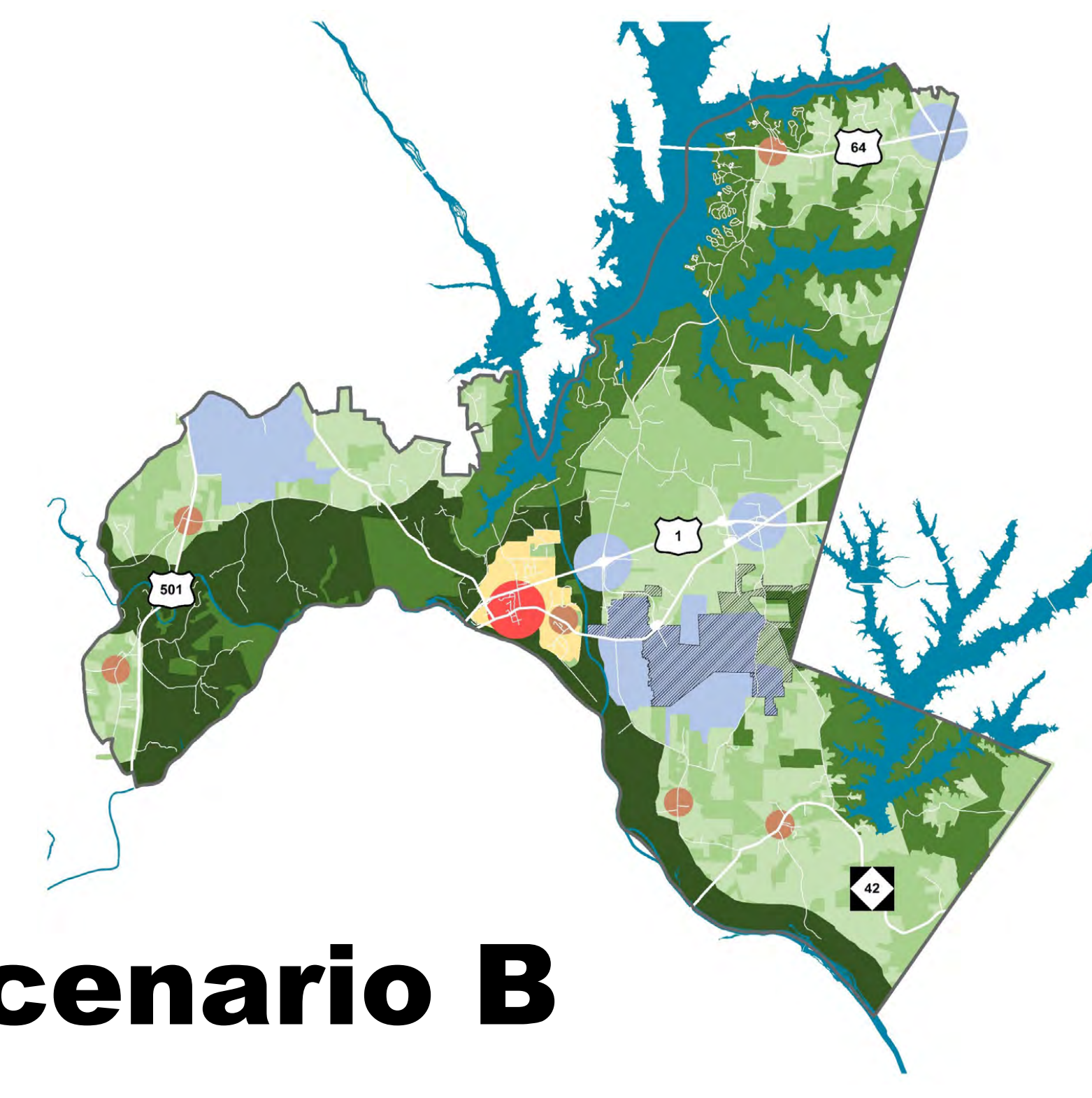
● One new square foot of non-residential development allocated between 2023 and 2040

Side-by-Side Scenario Comparison: Performance Measures



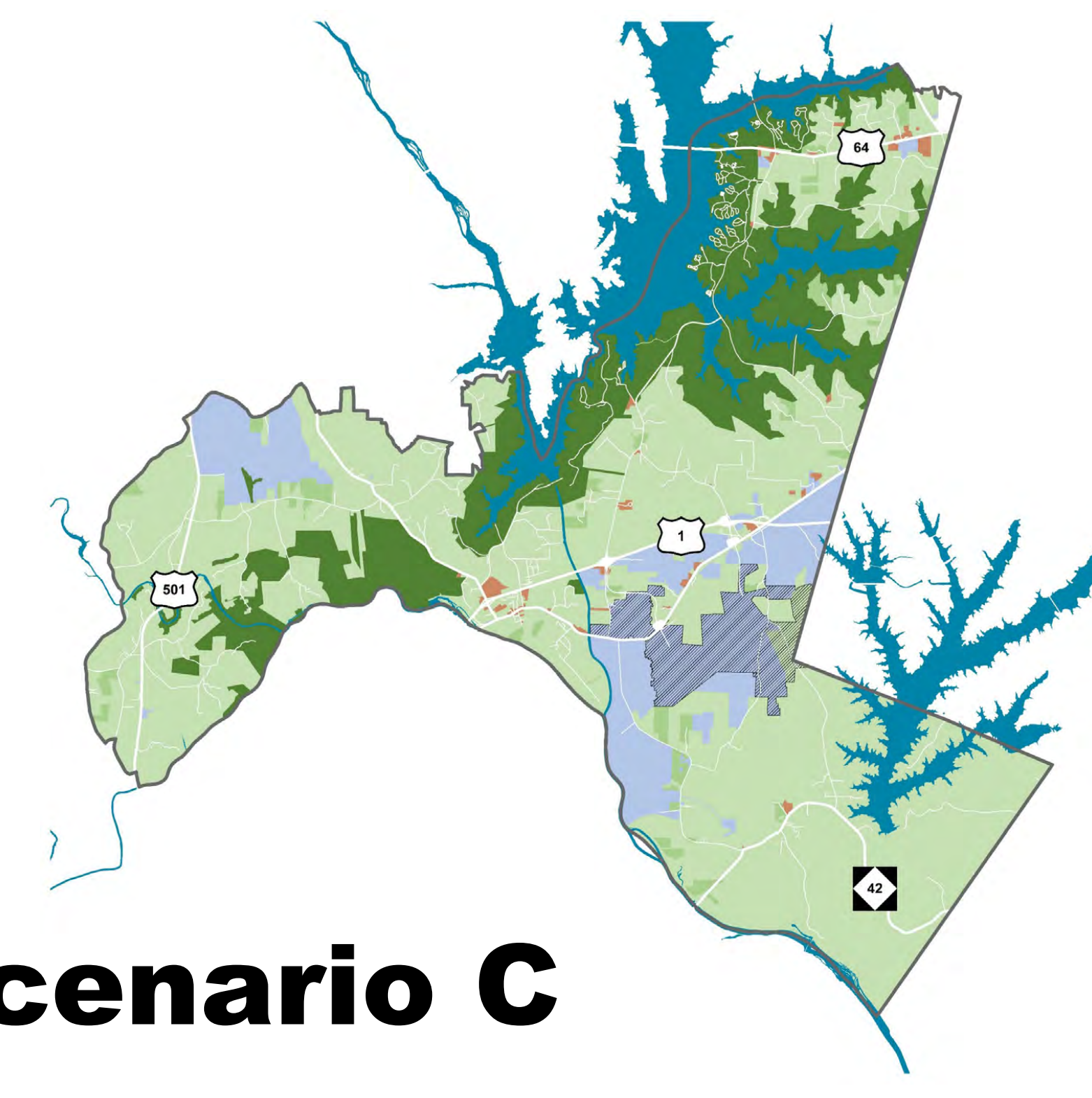
Scenario A

	+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



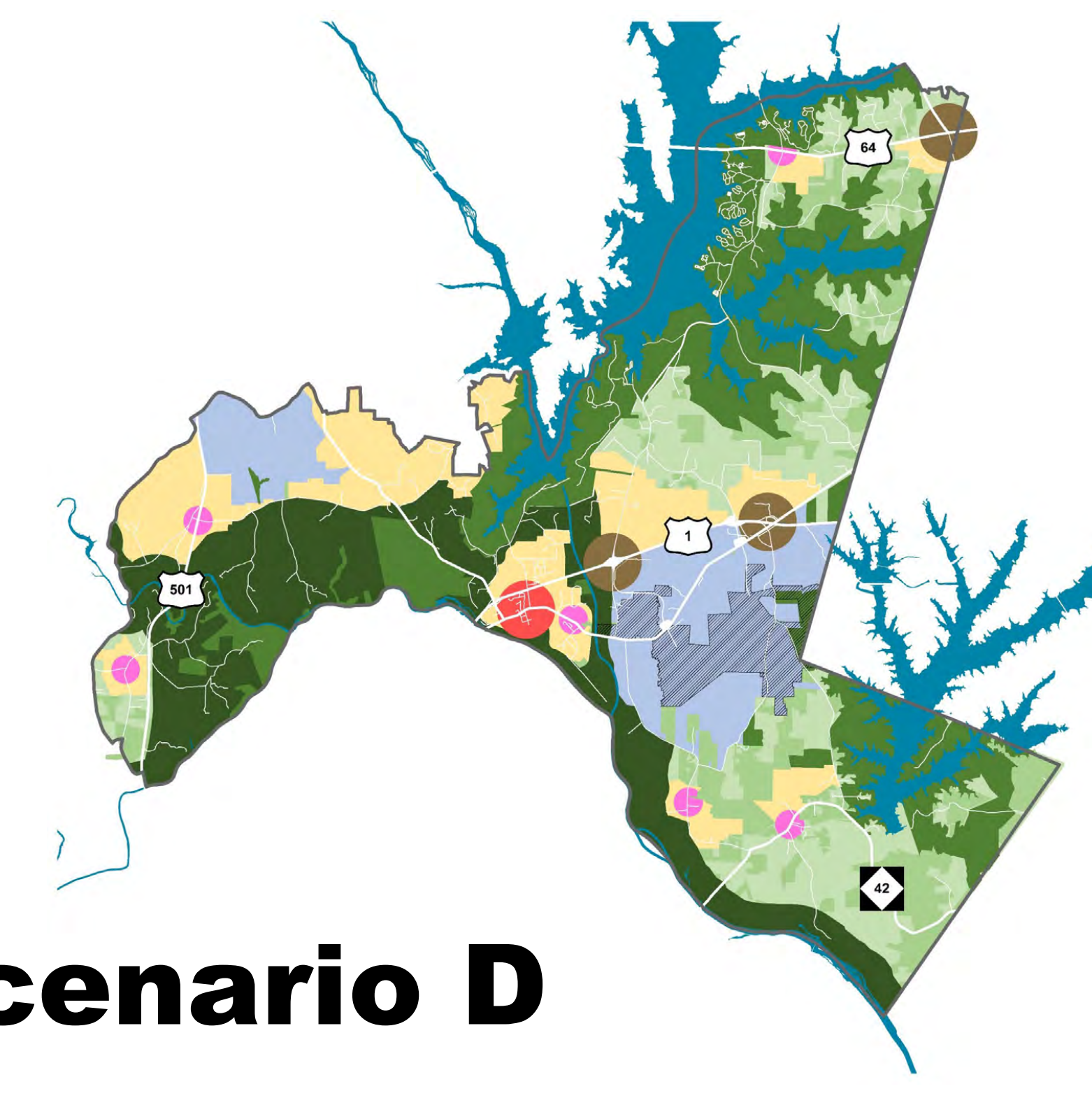
Scenario B

	+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

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.).