



P.O. Box 2430

Indian Trail, North Carolina 28079

PLANNING AND NEIGHBORHOOD SERVICES DEPARTMENT

Zoning Staff Report

Case: ZT 2016-010 School Impact Assessment		
Reference Name	Amendment of UDO Chapters 13140, 330, 350, 360, and 370	
Applicant	Town of Indian Trail	
Submittal Date	November 8, 2016	
Location	Town-wide	
Tax Map Number	N/A	
Plan Consistency	Town of Indian Trail Comprehensive Plan	Consistent With Goals of the Adopted Comprehensive Plan
Recommendations & Comments	Planning Staff	Recommends Approval of Proposed Text Amendment.

Project Summary

This is a request to amend Chapters 13140, 330, 350, 360, and 370 of the Unified Development Ordinance (UDO) to require the preparation of a school impact study for proposed residential developments with 50 or more lots or units. A school impact study is an analysis that identifies the anticipated student generation associated with a residential development.

Staff Recommendation- Staff recommends based on the guidance of the adopted plans that the text amendment be supported by recommending its approval to the Town Council.

Analysis/Overview

This request is initiated by the Town to require preparation of a school impact study in association with proposed single-family or multifamily residential developments with 50 or more lots or units. School impact studies were submitted voluntarily for two recent conditional rezoning projects (CZ 2016-004 Virginia Trace and CZ2016-005 Heritage). While the Town does not have a direct role in the planning or funding of school facilities, the Planning Board and Town Council found these studies informative in evaluating the impacts associated with larger residential rezoning requests. It is important to recognize that the Town may not require a developer to provide any mitigation (i.e. payment of fees, building construction, etc.) to offset any impacts identified in the school studies.

Attachment 1 contains the proposed UDO text amendment. For ease of reference, the proposed new text is referenced in red/underlined font and deletions are referenced in ~~strikethrough~~ font. In preparing the proposed text amendment, staff consulted with demographer Dr. Jerome Mckibben who is the consulting demographer responsible for preparing Union County Public School's student growth forecasts. Dr. Mckibben also authored the two previously mentioned school impact studies

that were submitted with recent proposed rezoning applications (Attachment 3 for reference). The following will provide a brief overview of the proposed amendment.

AMENDMENT OVERVIEW

1. *Study Content:* Studies are required to estimate student generation for grades preschool through 12th grade over a minimum 10-year horizon. Studies must be based on localized population and student data.
2. *Qualifications:* Authors of school impact studies must possess at a minimum a master’s degree in a relevant field of study and possess professional demography experience.
3. *Submittal Process:* Studies will be included with applications for conditional rezoning and planned development districts, both of which are reviewed by the Planning Board and Town Council. For proposed developments that are not subject to a conditional rezoning or planned development district application, studies will be provided with special use permit applications (reviewed by the Board of Adjustment) or major subdivision applications (reviewed by Town staff). In these later instances, properties are developing under their existing zoning or have undergone a “by-right” zoning map amendment/rezoning process, which does not require the submittal of any supplementary information or studies (i.e. traffic studies, etc.).
4. *Exemptions:* Nursing or skilled care uses are exempt from the study requirements in light of these uses not having a student generation associated with them.
5. *Miscellaneous:* The requirement for the preparation of a school impact study has been added to the UDO conditional rezoning, planned development district, special use permit, and major subdivision application submittal requirements.

Based on staff’s findings, we offer the following modifications for the Board’s consideration.

Required Consistency Findings

The Planning Board is required to make two consistency findings, one for consistency with Town adopted plans and another regarding the benefit of the public. Staff is of the opinion the following findings can be made:

1. The proposed UDO amendment is consistent with the following goals of the Comprehensive Plan:
 - **Quality of Life Goal No. 3:** The proposed text amendment will help provide additional data and awareness related to the student generation impacts of larger residential developments, which will help ensure continued excellence in Union County schools.
2. This UDO ordinance amendment is in the best interest of the public because it will help provide additional information related to any potential school impacts associated with residential development and will help in making informed land use decisions.

Staff recommends that the Planning Board make the required consistency findings and recommend adoption of this UDO Text Amendment ZT2016-010 as presented.

Staff Contact

Rox Burhans, Planning Director

704-821-5401

rburhans@planning.indiantrail.org

Attachment 1: Proposed Text Amendment

Attachment 2: Application

Attachment 3: Sample School Impact Study

Attachment 4: Draft Ordinance

ATTACHMENT ONE
ZT2016-010 Text Amendment

ZT2016-010 School Impact Study

13140 School Impact Study

13140.010 Requests for single-family and multifamily residential developments consisting of 50-lots/units or more shall include a school impact study estimating the number of students generated by the proposed development.

- A. Minimum Study Requirements: School impact studies shall provide an estimate of the student generation by the proposed residential development over a minimum ten (10) year horizon between preschool and twelfth (12) grades.

School impact studies shall be prepared by a professional demographer possessing at a minimum a master's degree in the subjects of demography, sociology, economics, urban planning, geography, and/or similar field. The demographer shall also have previous professional work experience in preparing population projections and other demography work products. A qualifications summary demonstrating the demographer's compliance with these requirements shall be included with each study. School impact studies shall be based on local, Union County specific population and student data and identify all data sources and assumptions used in the analysis.

- B. Submittal: School impact studies shall be submitted with the conditional rezoning or planned development application corresponding to the proposed residential development. If the residential development is not associated with a conditional rezoning or planned development application, the study shall be submitted with the special use permit, site plan or major subdivision application corresponding to the proposed residential development.

- C. Exceptions: Nursing care or skilled care facility uses are exempt from the requirements of UDO Chapter 13140.

330.020 Conditional Zoning Districts Application Procedures

- A. The applicant shall, at a minimum, include as part of the application, each of the items listed below:
21. School impact study for residential developments of fifty (50) lots/units or greater as required in UDO Chapter 13140.

350.030F Preliminary Plan Contents Required

The preliminary plan shall depict or contain the information specified in Section 350.130 and Chapter 13140, unless previously submitted through rezoning or special use permit process. Plans not illustrating or containing the information required for Section 350.130 and Chapter 13140 shall be returned to the applicant or authorized agent for completion and resubmission. _

360.010 SUP General Procedures

A complete application for a special use permit will be submitted to the Board of Adjustment by filing a copy of the application with the administrator. Such application shall be accompanied with a written consulting report from a North Carolina State Certified Real Estate Appraiser that conforms to Standard 5 of the Uniform Standards of Professional Appraisal Practice, except in the case of temporary event uses. A school impact study for residential developments of fifty (50) lots/units or greater as required in UDO Chapter 13140 shall also accompany the application unless previously submitted through the rezoning approval process.

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Chapter 370.030 Site plan Review Application Requirements

The required details for a site plan will be consistent with those required by Section 340.050A of this ordinance. The Director of Planning and Development may also require the following when deemed necessary:

A. Traffic Impact Analysis

A traffic impact analysis may be required in accordance with the Town of Indian Trail's Traffic Impact Analysis policy and Chapter 1340.

B. Environmental Impact Analysis

An environmental impact analysis may be required if it is determined sensitive resources may be impacted as a result of the development.

C. School Impact Study

A school impact study for residential developments of fifty (50) lots/units or greater as required in UDO Chapter 13140 shall also accompany the application unless previously submitted through the rezoning or special use permit approval processes.

D. Waiver of Application Requirements

The Director of Planning and Development will have the authority to waive any of the application requirements when he determines that the requisite information is not necessary to understand the application and the application complies with this UDO.

E. Approval by Director of Planning and Development

Site plans submitted for review under this Section will be processed and the applicant notified in writing of such approval, approval with conditions, or denial. In the case of a denial, the applicant may appeal this denial to the Zoning Board of Adjustment. The Director of Planning and Development may grant approval with conditions only to the extent that such conditions specify the actions necessary to bring the application into complete compliance with this UDO. If the proposed site plan is determined to be consistent with all applicable provisions of this UDO, the Director of Planning and Development will approve the site plan and so advise the applicant in writing.

F. Expiration of Approval

An approved site plan will expire two years from the date of approval unless the proposed development is pursued as set forth below:

ATTACHMENT TWO
Application

UDO TEXT AMENDMENT APPLICATION



PLANNING & NEIGHBORHOOD SERVICES

130 Blythe Drive

PO Box 2430

Indian Trail, NC 28079

Telephone (704) 821-5401

Fax (704) 821-9045

ONLY COMPLETE APPLICATIONS ACCEPTED

Processing Fee \$500.00

A TECHNOLOGY FEE, 10% OF PROCESSING FEE, WILL BE APPLIED TO THE TOTAL FEE.

UDO TEXT AMENDMENT APPLICATION

Subject Section of the UDO:

Name School Impact Study

Chapter: UDO Sections: 13140, 330.020, 350.030F, 360.010, and 370.030

Purpose: To require preparation of school impact studies for single-family and multifamily residential developments of 50 or more lots/units.

Contact Information – Applicant

Name Scott Kaufhold, Town Manager (Town of Indian Trail)

Address P.O. Box 2430

City Indian Trail, State NC Zip 28079

Phone 704-821-5401 Fax _____

Email sjk@planning.indiantrail.org

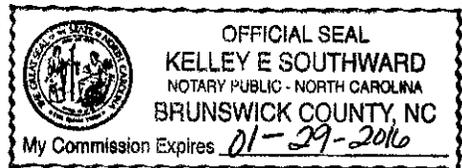
Applicant's Certification

Signature *Vicky Watts* Date 11-8-16

Printed Name/Title Deputy Town Manager

Signature of Notary Public *Kelley E Southward* Date 11-8-16

Notary Seal



TOWN OF INDIAN TRAIL OFFICE USE ONLY

CASE NUMBER: ZT 2016-010

DATE RECEIVED: 11/8/16

AMOUNT OF FEE: N/A

RECEIVED BY: *Rox Butler*

RECEIPT #: N/A

ATTACHMENT THREE
Sample Impact Study

Introduction

The focus of this report is to ascertain the impact of the 92 single family detached housing unit Virginia Trace subdivision on the elementary, middle school and high enrollment for the school years 2020-21 and 2025-26. The affected schools would be Sardis Elementary, Porter Ridge Middle School and Porter Ridge High School (given the attendance area boundaries in place for the 2016-17 school year).

These calculations assume the following:

- A. The subdivision will be built out and sold over a 3 year period (2017 through 2019) with roughly one third of the homes sold and occupied each year.
- B. The home will sell in the mid to upper \$200,000 range.
- C. The U.S. 74 bypass is completed by the end on 2018.
- D. There are no water or sewer restrictions implemented over the next 4 years.
- E. The 30 year fixed home mortgage rate stays below 5% over the next 4 years.

Methods and Data

Using single year of age data from the 2010 census and geo-coded student information by grade from the Union County Schools, yield factors by age were calculated for subdivisions in the Union County area that have similar housing unit types and sale prices (N=625 housing units) as the proposed Virginia Trace subdivision. The calculated average yield factors by housing unit were then summed into four categories, preschool (age 0-4), elementary (age 5-10), middle school (ages 11-13) and high school (ages 14-17). These yield factors were then applied to the proposed 92 housing units to be built in the Virginia trace subdivision to establish the estimated number of school age and preschool students living in the area for the 2020-21 school year. These results were then aged forward to estimate the total student impact by school for the 2025-26 school year.

Results

The results of the yield calculations by categories are as follows: Preschool - 0.32 average child per housing unit, elementary - 0.36, middle school - 0.11 and high school - 0.04.

When these yield rates were applied to the Virginia Trace subdivision, the results for the 2020-21 school year was as follows: 29 preschool students, 33 elementary, 10 middle school and 4 high school, for a total of 47 students. (see Table 1)

Given the housing unit type and price range of the Virginia Trace subdivision, the development will contain a relatively large number of preschool students by 2020. Thus the full impact of the development on school enrollment will not be seen until the 2025-26 school year.

To establish the full impact, the estimated number of students was aged forward from 2020-21 school year to 2025-26. The total estimated impact for 2025-26 is 61 students.

Table 1: Enrollment Impact

Virginia Trace Subdivision (92 units total)

Grade Level	Yield Factor	2020-21 School Year	2025-26 School Year
Preschool	0.32	29	9
K-5	0.36	33	30
6-8	0.11	10	17
9-12	0.04	4	14
Total K-12		47	61

Respectfully,

Jerome N. McKibben, Ph. D.

Senior Demographer, McKibben Demographic Research



ATTACHMENT FOUR
Ordinance

STATE OF NORTH CAROLINA)

TOWN OF INDIAN TRAIL) ORDINANCE # O16012 XYZ

AN ORDINANCE CREATING NEW CHAPTER 13140 SCHOOL IMPACT STUDY AND AMENDING CHAPTERS 330 CONDITIONAL ZONING DISTRICTS, 350 SUBDIVISIONS, 360 SPECIAL USE PERMITS, AND 370 SITE PLAN REVIEW OF THE INDIAN TRAIL UNIFIED DEVELOPMENT ORDINANCE (UDO) RELATED TO SCHOOL IMPACT STUDIES IN INDIAN TRAIL, NORTH CAROLINA

WHEREAS, the Town is the applicant for ZT 2016-010 requesting to create new Chapter 13140 School Impact Study and amending Chapters 330, Conditional Zoning Districts, 350 Subdivisions, 360 Special Use Permits, and 370 Site Plan Review related to school impact studies of the Unified Development Ordinance (UDO); and

WHEREAS, this Zoning Amendment (ZT 2016-010) was duly noticed in compliance with North Carolina General Statutes; and

WHEREAS, the amendment was heard by Planning Board on November 17, 2016 in a public meeting; and

WHEREAS, the Planning Board after hearing the amendment and deliberations made the following findings and recommended approval to the Town Council:

1. The proposed UDO amendment is consistent with the following goal of the Comprehensive Plan:
 - **Quality of Life Goal No. 3:** The proposed text amendment will help provide additional data and awareness related to the student generation impacts of larger residential developments, which will help ensure continued excellence in Union County schools.
2. This UDO ordinance amendment is in the best interest of the public because it will help provide additional information related to any potential school impacts associated with residential development and will help in making informed land use decisions.

WHEREAS, the Town Council received the Planning Board transmittal in the required public hearing held on **December 13, 2016**, and after receiving the transmittal, public comment, and deliberation, voted to approve the amendment with the required findings and amendment recommendation as transmitted by the Planning Board.

NOW THEREFORE, BY THE TOWN COUNCIL OF THE TOWN OF INDIAN TRAIL, NORTH CAROLINA HEREBY TAKES THE FOLLOWING ACTION:

Section 1 – UDO Chapter 13140 School Impact Study, Chapters 330 Conditional Zoning Districts, 350 Subdivisions, 360 Special Use Permits, and 370 Site Plan review is hereby Approved as shown in Exhibit A of this Ordinance;

Section 2- This ordinance shall be effective immediately upon adoption.

SO ORDAINED THIS 13TH DAY OF DECEMBER, 2016. THE TOWN COUNCIL OF INDIAN TRAIL

By _____
Honorable Michael L. Alvarez, Mayor

Attest:

Kelley Southward, Town Clerk

APPROVED AS TO FORM:

TOWN ATTORNEY