



**Date:** January 31, 2020

**To:** The County Commissioners: **Frank** Williams, Chairman/District 5; Randy Thompson, Vice-Chairman, District 1 ; J. Martin Cooke, District 2; Pat Sykes, District 3; Mike Forte, District 4; and, Randell Woodruff, County Manager

**From:** Holly Smith of Ilex Properties, and Jim Fish, President of Brunswick Senior Resources, for Calabash Meadows, an affordable Senior housing development

**Re:** Request for Impact Fee Deferral Loan

**History:** Last year, Brunswick County approved an Impact Fee Deferral Loan, in the amount of \$150,000, for Calabash Meadows, in conjunction with our application for housing tax credits. Sponsored by Brunswick Senior Resources, Inc ("BSRI"), and Ilex Properties, LLC ("Ilex"), Calabash Meadows is a proposed, 60-apartment complex limited to those aged 55 and above, with affordable rents and 8,000+ community spaces available for services and programs provided by BSRI. In 2019, however, the North Carolina Housing Finance Agency approved a family project for Brunswick County, instead of our Senior housing complex, and as such, we are re-submitting our application for 2020. We are confident that Calabash Meadows will receive an award of tax credits this year, based on Brunswick County's growth rate, particularly for Seniors (>55), which is the larger, and faster growing, segment of our population. The last affordable housing complex approved for Seniors in Brunswick County was a 2014 allocation for Sunset Creek Commons ("SCC"), developed by Ilex, which has 72, one and two bedroom apartments, and has remained 100% occupied since its opening in 2016. Despite a two-year "permanent" waiting list exceeding 65 applicants, the Site Manager continues to add qualified Seniors, fielding 10-15 calls each day, as well as walk-in traffic, because there is no comparable development for Seniors in the County. The County Commissioners previously approved a Deferred Impact Fee Loan for SCC, which has allowed us to keep rents low and serve a wider range of needy Seniors.

**Demand for Senior Housing:** The "Primary Market Area," according to the narrowly-defined, NCHFA Market Study obtained in 2019, includes Ocean Isle Beach, Sunset Beach, Carolina Shores, Calabash, and the southern portion of Shallotte, although its overall market draw obviously extends throughout Brunswick County and beyond, as reflected in the large influx of retirees to our area over the last many years. Brunswick County is now the third fastest growing County, with the Senior growth rate estimated at 58.7% from 2010 to 2023, representing 52.4% of the County's population. Carolina Shores, with its eastern boundary along the subject site, has a Senior population with an average age of 68, and has the largest population of Seniors "aging

265 Creek View Drive  
Sunset Beach, North Carolina  
28468



in place" in the State. Ocean Place subdivision, directly across from our site and which was developed in the late 90s-early 2000's, has 200+ homes, primarily owned by Seniors. Many Seniors owning homes would prefer to live "maintenance and worry—free," without the cost and hassle of finding repairmen, landscapers, and other service providers necessary to properly maintain a 20-30 year old, single family home.

Improvements: The proposed three- story building will include 8,000 square feet of community space, including, multiple meeting rooms for recreational, wellness, and social activities; a full-size kitchen with dining room; and a Library and Media room. Outdoor amenities include a picnic shelter with grills, a gazebo and walking trail, and multiple sitting areas. Calabash Meadows will be built according to energy star requirements, which will result in lower electricity costs for our residents, and a Site Manager and Maintenance Technician will be available, onsite, full time. Brunswick Senior Resources, Inc, will have an ownership position in the new Senior Community and will provide programs and services on—site for our Seniors, at little, or no, cost to them. BSRI will coordinate additional opportunities for our Seniors to socialize and engage with others in Calabash Meadows, and at other BSRI Senior Sites and Centers throughout the County.

Rents and Income levels will be limited to those Seniors earning an average of 60% or less of the Brunswick County Median Income, with average rents of \$650 and \$750 for the one- and two-bedroom apartments, respectively.

Impact Fee Deferral Loan: The following outlines a similar repayment structure to SCC's Impact Fee Deferral Loan, and we respectfully request that the Board of County Commissioners approve the following for Calabash Meadows, subject to an allocation of tax credits:

- \*Loan Amount: \$150,000.00;

- \*Interest, Payments, & Term: 2.0%, payable equally over 15 years (no balloon payment);

- \* Security: Mortgage on the \$9.6 million dollar development.

Thank you for your support in our efforts to provide safe, clean, convenient, and affordable rental housing for Seniors in Brunswick County!

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COUNTY OF BRUNSWICK  
FINANCE DEPARTMENT  
UTILITY BILLING DIVISION

WATER

FEE CALCULATION WORKSHEET

BCMS#: NA

Service taps greater than 2-inch must be installed by the Developer. Meters greater than 2-inch must be provided by the Developer and must meet County specifications. Prior to initiation of water service, all service taps shall be provided with proper backflow protection on the Owner's side of the meter and at the Owner's expense.

Name of Project or Development:

Water Fee Estimate - Calabash Meadows

Requester's Name:

Holly Smith

Date of Request:

1/30/2020

Mailing Address:

265 Creekview Drive

Completed By:

Wm. L. Pinnix, P.E.

Sunset Beach, NC

Home Phone:

(919) 673-5547 cell phone

Work Phone:

Physical Address for Service Connection:

(If different from mailing address above)

Portion of PID # 2250008302

Is Requester's property within another jurisdiction (i.e., sanitary district, water & sewer authority, municipality, or Special Assessment District)?

☒ No

☐ Yes If "Yes", inform the Requester to contact appropriate entity for other service and requirements.

Is this a new or existing structure?

Is County sewer available?

☒ New

☐ Existing

☐ No

☐ Yes

If applicable, provide permit # (water system extension):

Location on property where meter should be set, if known.

Dom. Meter Size:

Irr. Meter Size:

Number of residential units with 1 bedroom	30
Number of residential units with 2 bedrooms	30
Number of residential units with 3 bedrooms	
Number of residential units with 4 bedrooms	
Irrigation Area (square feet):	

Capital Recovery Sub- Total Cost
\$8,610
\$17,220
\$0
\$0
\$0.00
Total: \$25,830.00

Transmission Capital Recovery Sub- Total Cost
\$2,898
\$5,796
\$0
\$0
\$0
Total: \$8,694.00

1 REU = 210 gallons per day

	Meter & Tap Installation
	Meter Upgrade
	Irrigation Meter Only
	Split Service Irrigation Meter (At Time of Domestic Service Install)
	Split Service Irrigation Meter (On Existing Domestic Service)
	Meter Installation Only
	Meter for Well
	Premise Visit
	Surcharge - Dry Bore Excessive Length
	Surcharge - Wet Bore
	Surcharge - Wet Bore of Excessive Length
	Fireline Fee
	Account Deposit
\$ 25,830.00	Capital Recovery
\$ 8,694.00	Transmission CR
<b>\$34,524</b>	<b>Total</b>

Capital Recovery Charge (CRC) = \$ 860  
Transmission Line Cap Recovery = \$ 290

Capital Recovery Charge (CR) = 4.10  
Transmission Line Cap Recovery = \$ 1.38

FEE CALCULATION WORKSHEET

SEWER

BCMS#: NA

Name of Project or Development:

Sewer Fee Estimate - Calabash Meadows

Requester's Name:

Holly Smith

Date of Request:

1/30/2020

Mailing Address:

265 Creekview Drive  
Sunset Beach, NC 28468

Completed By:

Wm. L. Pinnix, P.E.

Home Phone:

(919) 673-5547 cell phone

Work Phone:

Physical Address for Service Connection:  
(If different from mailing address above)

Portion of PID # 2250008302

Is Requester's property within another jurisdiction (i.e., sanitary district, water & sewer authority, municipality, or Special Assessment District)?

☒ No

☐ Yes

If "Yes", inform the Requester to contact appropriate entity for other service and requirements.

Is this a new or existing structure?

☒ New

☐ Existing

Type of sewer available:

Gravity  
Pressure  
Vacuum

Is a Duplex Grinder Pump Station required?

Is Pump Station to be Owned and Maintained by County?  
If Yes Above, the Monthly Maintenance Fee is:

☐ YES  
☒ YES

☐ NO  
☒ NO

FALSE

Residential Units x \$6 per REU =

\$0.00

If applicable, provide permit # (pressure to pressure connection, private gravity system):

Location on property where service should be installed, if known.

Tap size:

inch Tap

Number of residential units with 1 bedroom	30
Number of residential units with 2 bedrooms	30
Number of residential units with 3 bedrooms	
Number of residential units with 4 bedrooms	

Capital Recovery Sub- Total Cost
\$30,009
\$60,018
\$0
\$0
Total: \$90,027.00

Transmission Capital Recovery Sub- Total Cost
\$9,996
\$19,992
\$0
\$0
Total: \$29,988.00

Total:

Total:

1 REU = 210 gallons per day

	Tap Fee
	County Duplex Pump Station (Multifamily)
	Premise Visit
	Surcharge - Dry Bore Excessive Length
	Surcharge - Dry Bore Excessive Size (Residential Only)
	Surcharge - Wet Bore
	Surcharge - Wet Bore of Excessive Length
\$ 90,027.00	Capital Recovery
\$ 29,988.00	Transmission CR
\$ 120,015.00	Total

Capital Recovery Charge (CR) = 14.29 per gallon  
Transmission Line Cap Recovery = \$ 4.76 per gallon

WWTP Designation:

WR - West Regional WWTP (210 gpd)

ST - Sea Trail WWTP (210)

NR - Northeast Brunswick Regional WWTP (210 gpd)

SH - Shallotte WWTP (210 GPD)

CS - Carolina Shores WWTP (210 GPD)

OIB - Ocean Isle Beach WWTP (210 GPD)

SEWER

FOR CUSTOMER SERVICE USE ONLY

Account No.

Date of Request:

1/30/20

Requester's Name:

0

Completed By:

Wm. L. Pinnix, P.E.

Mailing Address:

0

Home Phone:

0

0

Work Phone:

0

Physical Address for Service Connection:  
(If different from mailing address above)

Portion of PID # 2250008302

0

If commercial or industrial, Name of Business:

Reviewed By



