

**A RESOLUTION ACCEPTING AND COMMENTING ON THE SCHOOLS ADEQUATE
PUBLIC FACILITIES ORDINANCE TECHNICAL ADVISORY COMMITTEE (SAPFOTAC)**

DRAFT 2011 REPORT

Draft Resolution No. 109/2010-11

BE IT RESOLVED by the Board of Aldermen of the Town of Carrboro that the Aldermen have received the Schools Adequate Public Facilities Ordinance Technical Advisory Committee Draft 2011 Annual Report and provide the following comments:

- 1.
- 2.
- 3.

BERNADETTE PELISSIER, CHAIR
 STEVE YUHASZ, VICE CHAIR
 VALERIE P. FOUSHEE
 ALICE M. GORDON
 PAM HEMMINGER
 BARRY JACOBS
 EARL MCKEE

ORANGE COUNTY BOARD OF COMMISSIONERS
POST OFFICE BOX 8181
200 SOUTH CAMERON STREET
HILLSBOROUGH, NORTH CAROLINA 27278



April 6, 2011

Mark Kleinschmidt, Mayor
 Town of Chapel Hill
 405 Martin Luther King Jr. Blvd.
 Chapel Hill, NC 27514

Tony McKnight, Chair
 Orange County Board of Education
 200 E. King Street
 Hillsborough, NC 27278

Mark Chilton, Mayor
 Town of Carrboro
 301 W. Main Street
 Carrboro, NC 27510

Jamezetta Bedford, Chair
 Chapel Hill-Carrboro Board of Education
 750 Merritt Mill Road
 Chapel Hill, NC 27516

Tom Stevens, Mayor
 Town of Hillsborough
 P.O. Box 429
 Hillsborough, NC 27278

Subject: Schools Adequate Public Facilities Ordinance Technical Advisory Committee
 (SAPFOTAC) Annual Report

Dear Sir or Madam:

This letter is to update you on the status of the 2011 Annual SAPFOTAC Report. In accordance with the SAPFO Memoranda of Understanding (MOU), the Board of County Commissioners (BOCC) approved the November 15, 2010 actual membership and capacity numbers for Orange County Schools and Chapel Hill – Carrboro City Schools at its meeting on December 6, 2010 and revised OCS membership and capacity numbers at the February 1, 2011 meeting.

The SAPFOTAC, comprised of representatives of both school systems and the Planning Directors of the County and Towns has produced the 2011 Annual Report. As per the SAPFO MOU, the annual technical report contains information on Level of Service, Building Capacity, Membership Date, Capital Investment Plan, Student Membership Projection Methodology, Student Membership Projections, Student Membership Growth Rate, Student/Housing Generation Rate, and the SAPFO Process. Enclosed for your use are copies of the 2011 Executive Summary and the April 5, 2011 BOCC meeting agenda item abstract when the BOCC received the draft report.

The full draft SAPFOTAC report is available on the Orange County Planning Department website in the Current Interest Projects section

<http://www.co.orange.nc.us/planning/SpecialProjects.asp>

The 2011 Annual SAPFOTAC Report is scheduled to be certified by the BOCC at a regular meeting in June 2011. Therefore, if you have any comments pertaining to the report, please forward them to Craig N. Benedict, Planning Director, no later than 5:00 p.m. on **May 10, 2011**. Mr. Benedict can be reached by phone at (919) 245-2592, by e-mail at cbenedict@co.orange.nc.us, or by fax at (919) 644-3002. Any comments received will be part of our agenda package in June.

Please share this information and the 2011 SAPFOTAC report with your respective boards.

Sincerely,



Bernadette Pelissier
Chair

Enclosures

cc: Board of County Commissioners

Frank Clifton, Orange County Manager

Roger L. Stancil, Manager, Town of Chapel Hill

Steven Stewart, Manager, Town of Carrboro

Eric Peterson, Manager, Town of Hillsborough

Neil Pedersen, Superintendent, Chapel Hill-Carrboro City Schools

Patrick Rhodes, Superintendent, Orange County Schools

George McFarley, Chief Operating Officer, Orange County Schools

Todd LoFrese, Assistant Superintendent for Support Services, Chapel Hill-Carrboro City Schools

Kevin Morgenstein Fuerst, Coordinator for Student Enrollment, Chapel Hill-Carrboro City Schools

Craig Benedict, Planning Director, Orange County

J.B. Culpepper, Planning Director, Town of Chapel Hill

Margaret Hauth, Planning Director, Town of Hillsborough

Trish McGuire, Planning Administrator, Town of Carrboro

ORANGE COUNTY, NC SCHOOLS ADEQUATE PUBLIC FACILITIES ORDINANCE

**PREPARED BY A STAFF COMMITTEE: PLANNING DIRECTORS,
SCHOOL REPRESENTATIVES, TECHNICAL ADVISORY COMMITTEE
(SAPFOTAC)**

**(PURSUANT TO PROVISIONS OF A MEMORANDUM OF
UNDERSTANDING ADOPTED IN 2002 & 2003)
(ORDINANCES ADOPTED IN JULY, 2003)**

Annual Report 2011

(BASED ON NOVEMBER 2010 DATA)

CERTIFIED BY THE BOCC ON XXXXX

2011 SAPFOTAC Executive Summary

I. Base Memorandum of Understanding

A. Level of Service.....(No Change).....Pg. 1

	<i>Chapel Hill/Carrboro School District</i>	<i>Orange County School District</i>
<i>Elementary</i>	105%	105%
<i>Middle</i>	107%	107%
<i>High</i>	110%	110%

B. Building Capacity and Membership.....(Change).....Pg. 2

	<i>Chapel Hill/Carrboro School District</i>			<i>Orange County School District</i>		
	Capacity	Membership	Increase from Prior Year	Capacity	Membership	Increase from Prior Year
<i>Elementary</i>	5244	5296	77	3694	3285	74
<i>Middle</i>	2840	2722	14	2166	1698	33
<i>High</i>	3875	3640	34	2558	2222	5

C. Membership Date – November 15.....(No Change).....Pg.17

II. Annual Update to SAPFO System

A. Capital Investment Plan (CIP).....(Change).....Pg. 18

B. Student Membership Projection Methodology.....(No Change).....Pg. 19 *The average of 3, 5, and 10 year history/cohort survival, linear and arithmetic projection models.*

C. Student Membership Projections.....(Change).....Pg.29

Analysis of 5 Years of Projections for 2010-11 School Year – Chapel Hill Carrboro City Schools

(The number in brackets [n] is the number of students the projection was off compared to actual membership. A number in parenthesis within the brackets [(n)] indicates the projection was low compared to the actual whereas a number not in parenthesis indicates the projection was high compared to the actual.)

		Year Projection Made for 2010-11Membership				
	Actual 2010 Membership	2005-06	2006-07	2007-08	2008-09	2009-10
Elementary	5296	5518 [222]	5541 [245]	5603 [307]	5533 [237]	5381 [85]
Middle	2722	2921 [199]	2833 [111]	2853 [131]	2826 [104]	2742 [20]
High	3640	3789 [149]	3704 [64]	3777 [137]	3732 [92]	3662 [22]

Executive Summary

- B. The projected growth rate at this level is expected to increase at a lesser rate over the next 10 years.
- C. Beginning this school year, Phoenix Academy High School became an official high school within the district with a capacity of 40 students.
- D. Expansion of Carrboro High School from the initial capacity of 800 students to the ultimate capacity of 1,200 students is no longer projected to be needed in the 10 year projection time frame.

ORANGE COUNTY SCHOOL DISTRICT**Elementary School District**

- A. Does not currently exceed 105% LOS standard (current LOS is 88.9%).
- B. The projected growth rate at this level is expected to increase at a greater rate over the next 10 years.
- C. Does not affect or prompt CIP activity in 10-year timeframe. However, staff is monitoring new development activity in the Orange County portion of Mebane, which is not a party to the Schools APFO MOU at this time.

Middle School District

- A. Does not currently exceed 107% LOS standard (current LOS is 78.4%).
- B. The projected growth rate at this level is expected to increase at a greater rate over the next 10 years.
- C. Does not affect or prompt CIP activity in 10-year time frame. However, staff is monitoring new development activity in the Orange County portion of Mebane, which is not a party to the Schools APFO MOU at this time.

High School District

- A. Does not currently exceed 110% LOS (current LOS is 86.9%).
- B. The projected growth rate at this level is expected to increase at a greater rate over the next 10 years.
- C. Does not affect or prompt CIP activity in 10-year time frame. However, staff is monitoring new development activity in the Orange County portion of Mebane, which is not a party to the Schools APFO MOU at this time.

Orange County, NC School Adequate Public Facilities Ordinance**INTRODUCTION**

The Schools Adequate Public Facilities Ordinance and its Memorandum of Understanding are ordinances and agreements, respectively. Supporting documents are anticipated to be dynamic to incorporate the annual changing conditions of membership, capacity and student projections that may affect School Capital Investment Plan (CIP) timing. This formal annual report will be forthcoming to all of the Schools Adequate Public Facilities Ordinance partners each year as new information is available.

This updated information is used in the schools capital needs process of the Capital Investment Plan (Process 1) and within elements of the Schools Adequate Public Facilities Ordinance Certificate of Adequate Public Schools (CAPS) spreadsheet system (Process 2).

This report and any comments from the Schools Adequate Public Facilities Ordinance partners will be considered in the first half of each year by the Board of County Commissioners at a regular or special meeting. The various elements of the report are then “certified” and formally considered in the process of the upcoming Capital Investment Plan. The Certificate of Adequate Public Schools system is updated after November 15 when data is received from the school districts with actual membership and pre-certified capacity (i.e. CIP capacity or prior “joint action” capacity changes).

The Schools Adequate Public Facilities Ordinance and Memorandum of Understanding have dynamic aspects. The derivation of the baseline and update to the variables will continue in the future as a variety of school related issues are fine-tuned by technical and policy groups.

The primary facet of this report includes the creation of mathematical projections for student memberships by school levels (Elementary, Middle and High) and by School Districts (Chapel Hill/Carrboro and Orange County). This information is found in Section II, Subsections B, C, D, and E.

In summary, this report serves as an update to the dynamic conditions of student membership and school capacity which effect future projected needs considered in Capital Investment Planning.

Interested parties may make their comments known to the Board of County Commissioners prior to their review of the report and school CIP completion or ask questions of the SAPFOTAC members.

ANNUAL REPORT AS OUTLINED IN
Schools Adequate Public Facilities Ordinance Memorandum
of Understanding (Schools APFO MOU)
SECTION 1d

RESPECTFULLY SUBMITTED
TO SCHOOLS ADEQUATE PUBLIC FACILITIES
ORDINANCE PARTNERS

Chapel Hill/Carrboro School District School APFO	Orange County School District School APFO
Board of County Commissioners	Board of County Commissioners
Carrboro Board of Aldermen	Hillsborough Town Council
Chapel Hill Town Council	
Chapel Hill/Carrboro School Board	Orange County School Board

Planning Directors/School Representatives
Technical Advisory Committee
(aka SAPFOTAC)

Orange County Planning Department
Craig Benedict, Planning Director,
Shannon Berry, Special Projects Planner
131 W. Margaret Lane
P.O. Box 8181
Hillsborough, NC 27278

Town of Chapel Hill
J.B. Culpepper, Planning Director
405 Martin Luther King, Jr. Blvd.
Chapel Hill, North Carolina 27514

Town of Hillsborough
Margaret Hauth, Planning Director
P.O. Box 429
Hillsborough, NC 27278

Orange County School District
Patrick Rhodes, Superintendent and
George McFarley, Chief Operating Officer
200 E. King Street
Hillsborough, NC 27278

Carrboro Planning Department
Trish McGuire, Planning Administrator
301 West Main Street
Carrboro, NC 27510

Chapel Hill-Carrboro School District
Todd LoFrese, Assistant Superintendent for Support Services and
Kevin Morgenstein Fuerst, Coordinator of Student Enrollment
750 Merritt Mill Road
Chapel Hill, NC 25716

I. BASE MEMORANDUM OF UNDERSTANDING

A. Level of Service

1. **Responsible Entity for Suggesting Change** – Change can only be effectuated by amendment to Memorandum of Understanding (MOU) by all School APFO partners.
2. **Definition** – Level of Service (LOS) means the amount (level) of students that can be accommodated (served) at a certain school system grade group [i.e., Elementary level (K-5), Middle Level (6-8), High School Level (9-12)].

3. **Standard for:**

Standard for:

Chapel Hill Carrboro School District

Orange County School District

Elementary	Middle	High School	Elementary	Middle	High School
105%	107%	110%	105%	107%	110%

4. **Analysis of Existing Conditions**

Analysis of Existing Conditions

Chapel Hill Carrboro School District

Orange County School District

These standards are acceptable at this time.

These standards are acceptable at this time.

5. **Recommendation –**

Recommendation–

No Change from above standard

No Change from above standard

Section I

B. Building Capacity

1. ***Responsible Entity for Suggesting Change*** - The Planning Directors, School Representatives, Technical Advisory Committee (SAPFOTAC) will receive requested changes that are CIP related and adopted in the prior year. CIP capacity changes will be updated along with actual membership received in November of each year.
Other changes will be sent to a 'Joint Action Committee' of the BOCC and Board of Education, as noted in the MOU, who will make recommendations and forward changes (on the specific forms with justification) to the full Board of County Commissioners for review and action. These non-CIP changes would be updated in the upcoming November CAPS system recalibration and included in the SAPFOTAC report.
2. ***Definition-*** "For purposes of this Memorandum, "building capacity" will be determined by reference to State guidelines and the School District guidelines (consistent with CIP School Construction Guidelines/policies developed by the School District and the Board of County Commissioners) and will be determined by a joint action of the School Board and the Orange County Board of Commissioners. As used herein the term "building capacity" refers to permanent buildings. Mobile classrooms and other temporary student accommodating classroom spaces are not permanent buildings and may not be counted in determining the school districts building capacity."
3. ***Standard for:***

Chapel Hill Carrboro School District The original certified capacity for each of the schools was certified by the respective superintendent and incorporated in the initialization of the CAPS system (Chapel Hill Carrboro School District April 29, 2002 - Base) Capacity changes were made each year as follows: 2003: Increase of 619 at Rashkis Elementary. 2004: No changes at Elementary, Middle, or High	Standard for: Orange County School District The original certified capacity for each of the schools was certified by the respective superintendent and incorporated in the initialization of the CAPS system (Orange County School District April 30, 2002 - Base) Capacity changes were made each year as follows:
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Section I

School levels.

2005: No changes at Elementary, Middle, or High School levels.

2006: No changes at Elementary, Middle, or High School levels.

2007: An increase of 800 at the High School level with the opening of Carrboro High School.

2008: An increase of 323 at the Elementary School level due to the opening of Morris Grove Elementary School and the implementation of the 1:21 class size ratio in grades K-3

2009: No changes at Elementary, Middle, or High School levels.

2010: An increase in capacity of 40 students at the High School level with Phoenix Academy High School becoming official high school within the district

2003: No net increase in capacity at Elementary level. No changes at Middle School level. Increase of 1,000 at Cedar Ridge High School.

2004: No net increase in capacity at Elementary level. No changes at Middle or High School levels.

2005: An increase in capacity of 100 at Hillsborough Elementary with the completion of renovations.

2006: An increase in capacity of 700 at the Middle School level with the completion of Gravelly Hill Middle School and an increase of 15 at the High School level with the temporary location of Partnership Academy Alternative School. An increase of 2 at the Elementary level due to a change in the capacity calculation for each grade at each school.

2007: No changes at Elementary, Middle, or High School levels.

2008: A decrease of 228 at the Elementary School level due to the implementation of the 1:21 class size ratio in grades K-3 and an increase of 25 at the High School level with the completion of the new Partnership Academy Alternative School.

2009: No changes at Elementary, Middle, or High School levels.

2010: No changes at Elementary, Middle, or High School levels.

*Section I***4. *Analysis of Existing Conditions*****Chapel Hill Carrboro School District**

The Schools Facilities Task Force developed a system to calculate capacity. Any changes year to year will be monitored, reviewed, and recorded by the SAPFOTAC on approved forms distributed to SAPFO partners and certified upon approval by the Board of County Commissioners each year.

The requested 2010-11 capacity is noted on
Attachment I.B.4

Analysis of Existing Conditions**Orange County School District**

The Schools Facilities Task Force developed a system to calculate capacity. Any changes year to year will be monitored, reviewed, and recorded by the SAPFOTAC on approved forms distributed to SAPFO partners and certified upon approval by the Board of County Commissioners each year.

The requested 2010-11 capacity is noted on
Attachment I.B.3

5. *Recommendation – Accept school capacities at all levels, as reported by CHCCS and shown in Attachment I.B.4.****Recommendation – Accept school capacities at all levels, as reported by OCS and shown in Attachment I.B.3.***

Section I

Attachment I.B.1
(page 1 of 3)
2009-10

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools

SAPFO CAPS Year: November 13, 2009 - November 15, 2010

Capacity and Membership Submittal Date: November 13, 2009²

Elementary School	Square Feet	2005-2006 Requested Capacity	2006-2007 Requested Capacity	2007-2008 Requested Capacity	2008-2009 Requested Capacity	2009-2010 Requested Capacity	Justification Footnote #	Membership
Cameron Park	70,812	559	565	565	565	565	1	631
Central	52,492	455	455	455	455	455	1	243
Erland Oaks	64,316	487	497	497	497	497	1	401
Grady Brown	74,016	526	544	544	544	544	1	449
Hillsborough	51,106	477	471	471	471	471	1	411
New Hope	100,164	477	586	586	586	586	1	587
Pathways	85,282	556	576	576	576	576	1	489
Total	498,188	3,637	3,694	3,694	3,694	3,694		3,211

Special Note(s): 1. For the November 15, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planners and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by (1) the School CIP or (2) an amended version of this form that is certified by the BOCC.

2. November 15th falls on a weekend in 2009. Therefore, membership numbers provided shall be from the Friday before.

Justification:

1. Elementary school capacities reflect 1:21 class size ratio in grades K-3.

Capacity Certification:

S. Patrick Rosh 11-13-09
Superintendent Date

Valerie Rosh 12/17/09
BOCC Chair Date

Membership Certification:

S. Patrick Rosh 11-13-09
Superintendent Date

Valerie Rosh 12/17/09
BOCC Chair Date

Section I

Attachment I.B.1
(page 2 of 3)
2009-10

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools

SAPFO CAPS Year: November 13, 2009 - November 15, 2010

Capacity and Membership Submittal Date: November 13, 2009²

Middle School	Square Feet	2005-2006 Requested Capacity	2006-2007 Requested Capacity	2007-2008 Requested Capacity	2008-2009 Requested Capacity	2009-2010 Requested Capacity	Justification Footnote #	Membership
A.T. Stanback	136,000	740	740	740	740	740		594
C.W. Stanford	107,620	726	726	726	726	726		571
Gravelly Hill	123,000	0	700	700	700	700		500
Total	366,620	1,466	2,166	2,166	2,166	2,166		1,665

Special Note(s): 1. For the November 15, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planners and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by (1) the School CIP or (2) an amended version of this form that is certified by the BOCC.

2. November 15th falls on a weekend in 2009. Therefore, membership numbers provided shall be from the Friday before.

Justification:

Capacity Certification:

Patricia Rhodes 11-13-09
Superintendent Date

Valerie R. Hester 12/12/09
BOCC Chair Date

Membership Certification:

Patricia Rhodes 11-13-09
Superintendent Date

Valerie R. Hester 12/12/09
BOCC Chair Date

Attachment I.B.1
(page 3 of 3)
2009-10

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools

SAPFO CAPS Year: November 13, 2009 - November 13, 2010

Capacity and Membership Submittal Date: November 13, 2009²

High School	Square Feet	2005-2006 Requested Capacity	2006-2007 Requested Capacity	2007-2008 Requested Capacity	2008-2009 Requested Capacity	2009-2010 Requested Capacity	Justification Footnote #	Membership
Orange	213,509	1,518	1,518	1,518	1,518	1,518		1,221
Cedar Ridge	206,900	1,000	1,000	1,000	1,000	1,000		986
Partnership	2,249	15	15	15	40	40		10
Total	422,658	2,533	2,533	2,533	2,558	2,558		2,217

Special Note(s): 1. For the November 13, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planners and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by (1) the School CIP or (2) an amended version of this form that is certified by the BOCC.

2. November 13th falls on a weekend in 2009. Therefore, membership numbers provided shall be from the Friday before.

Justification:

Capacity Certification:

[Signature] 11-13-09
Superintendent Date

[Signature] 11/13/09
BOCC Chair Date

Membership Certification:

[Signature] 11-13-09
Superintendent Date

[Signature] 12/13/09
BOCC Chair Date

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools

SAPFO CAPS Year: November 13, 2009 - November 15, 2010

Capacity and Membership Submittal Date: November 13, 2009²

Elementary School	Square Feet	2005-2006 Requested Capacity	2006-2007 Requested Capacity	2007-2008 Requested Capacity	2008-2009 Requested Capacity	2009-2010 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Carrboro	60,832	533	533	533	533	533		505
Ephesus	66,952	448	448	448	448	448		430
Fries Hill	56,299	527	527	527	527	527		516
Glenwood	50,764	423	423	423	423	423		435
FP Graham	66,689	538	538	538	538	538		495
McDougle	98,000	564	564	564	564	564		569
Rashley	95,729	585	585	585	585	585		544
Scruggs	90,980	575	575	575	575	575		568
Seawell	52,896	466	466	466	466	466		559
Morris Grove	90,221	0	0	0	585	585		598
Total	729,362	4,659	4,659	4,659	5,244	5,244		5,219

Special Note(s): 1. For the November 13, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planners and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by (1) the School CIP or (2) an amended version of this form that is certified by the BOCC.

2. November 15th falls on a weekend in 2009. Therefore, membership numbers provided shall be from the Friday before.

Justification:
Capacity Certification:

W.B. Peden 11-16-09
 Superintendent Date

John P. Harker 12/12/09
 BOCC Chair Date

Membership Certification:

W.B. Peden 11-16-09
 Superintendent Date

John P. Harker 12/12/09
 BOCC Chair Date

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools

SAPFO CAPS Year: November 13, 2009 - November 15, 2010

Capacity and Membership Submittal Date: November 13, 2009³

Middle School	Square Feet	2005-2006 Requested Capacity	2006-2007 Requested Capacity	2007-2008 Requested Capacity	2008-2009 Requested Capacity	2009-2010 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Cuthbert	108,058	670	670	670	670	670		648
M. Double	136,221	732	732	732	732	732		666
Phillips	109,498	706	706	706	706	706		686
Smith	128,764	732	732	732	732	732		708
Total	482,541	2,840	2,840	2,840	2,840	2,840		2,708

Special Note(s): 1. For the November 15, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planners and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by (1) the School CIP or (2) an amended version of this form that is certified by the BOCC.

2. November 13th falls on a weekend in 2009. Therefore, membership numbers provided shall be from the Friday before.

Justification:
Capacity Certification:

Neil S. Peden 11-16-09
 Superintendent Date

John R. Humber 12/17/09
 BOCC Chair Date

Membership Certification:

Neil S. Peden 11-16-09
 Superintendent Date

John R. Humber 12/17/09
 BOCC Chair Date

Attachment I.B.2
(page 3 of 3)
2009-10

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools

SAPFO CAPS Year: November 13, 2009 - November 15, 2010

Capacity and Membership Submittal Date: November 13, 2009

High School	Square Feet	2005-2006 Requested Capacity	2006-2007 Requested Capacity	2007-2008 Requested Capacity	2008-2009 Requested Capacity	2009-2010 Requested Capacity	Justification Estimate #	Membership (referenced school year)
Chapel Hill	241,111	1,520	1,520	1,520	1,520	1,520		1,566
East Chapel Hill	259,869	1,515	1,515	1,515	1,515	1,515		1,478
Carrboro	148,023	0	0	800	800	800		762
Total	649,003	3,035	3,035	3,835	3,835	3,835		3,606

Special Note(s): 1. For the November 15, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planners and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by (1) the School CIP or (2) an amended version of this form that is certified by the BOCC.

2. November 15th falls on a weekend in 2009. Therefore, membership numbers provided shall be from the Friday before.

Justification:

Capacity Certification:

M. S. Reddy 11-16-09
Superintendent Date

John R. Hume 12/17/09
BOCC Chair Date

Membership Certification:

M. S. Reddy 11-16-09
Superintendent Date

John R. Hume 12/17/09
BOCC Chair Date

School APFO Capacity, Membership and Change Request Form**School District:** Orange County Schools**SAPFO CAPS Year:** November 15, 2010 - November 14, 2011**Capacity and Membership Submittal Date:** November 15, 2010

Elementary School	Square Feet	2006-2007 Requested Capacity	2007-2008 Requested Capacity	2008-2009 Requested Capacity	2009-2010 Requested Capacity	2010-2011 Requested Capacity	Justification Footnote #	Membership
Cameron Park	70,812	565	565	565	565	565		625
Central	52,492	455	455	455	455	455		203
Elland Checks	64,316	497	497	497	497	497		447
Grady Brown	74,016	544	544	544	544	544		479
Hillsborough	51,106	471	471	471	471	471		411
New Hope	100,164	586	586	586	586	586		577
Pathways	85,282	576	576	576	576	576		483
Total	498,188	3,694	3,694	3,694	3,694	3,694		3,285

Special Note(s): 1. For the November 15, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planners and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by (1) the School CIP or (2) an amended version of this form that is certified by the BOCC.

Justification:**Capacity Certification:**

S. Patil Rhoads 1-18-11
 Superintendent Date

Bernette Palmer 2/9/11
 BOCC Chair Date

Membership Certification:

S. Patil Rhoads 1-18-11
 Superintendent Date

Bernette Palmer 2/9/11
 BOCC Chair Date

Section I

Attachment I.B.3
(page 2 of 3)
2010-11

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools

SAPFO CAPS Year: November 15, 2010 - November 14, 2011

Capacity and Membership Submittal Date: November 15, 2010

Middle School	Square Feet	2006-2007 Requested Capacity	2007-2008 Requested Capacity	2008-2009 Requested Capacity	2009-2010 Requested Capacity	2010-2011 Requested Capacity	Justification Footnote #	Membership
A.L. Stanback	136,000	740	740	740	740	740		611
C.W. Stanford	107,620	726	726	726	726	726		590
Gravelly Hill	123,000	700	700	700	700	700		497
Total	366,620	2,166	2,166	2,166	2,166	2,166		1,698

Special Note(s): 1. For the November 15, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planners and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by: (1) the School CIP or (2) an amended version of this form that is certified by the BOCC.

Justification:

Capacity Certification:

D. Patrick Rhode 1-18-11
Superintendent Date

Bernadette Palmer 1-18-11
BOCC Chair Date

Membership Certification:

D. Patrick Rhode 1-18-11
Superintendent Date

Bernadette Palmer 2/4/11
BOCC Chair Date

Section I

Attachment I.B.3
(page 3 of 3)
2010-11

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools

SAPFO CAPS Year: November 15, 2010 - November 14, 2011

Capacity and Membership Submittal Date: November 15, 2010

High School	Square Feet	2006-2007 Requested Capacity	2007-2008 Requested Capacity	2008-2009 Requested Capacity	2009-2010 Requested Capacity	2010-2011 Requested Capacity	Justification Footnote #	Membership
Orange	213,509	1,518	1,518	1,518	1,518	1,518		1,188
Cedar Ridge	206,900	1,000	1,000	1,000	1,000	1,000		1,005
Partnership	6,600	15	15	40	40	40		29
Total	427,009	2,533	2,533	2,558	2,558	2,558		2,222

Special Note(s): 1. For the November 15, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planners and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by (1) the School CAP or (2) an amended version of this form that is certified by the BOCC.

Justification:

Capacity Certification:

B. Patrick Rhodes 1-18-11
Superintendent Date

Bernadette Polimeni 2/4/11
BOCC Chair Date

Membership Certification:

B. Patrick Rhodes 1-18-11
Superintendent Date

Bernadette Polimeni 2/4/11
BOCC Chair Date

Section I

Attachment I.B.4
(page 1 of 3)
2010-11

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools

SAPFO CAPS Year: November 15, 2010 - November 14, 2011

Capacity and Membership Submittal Date: November 15, 2010

Elementary School	Square Feet	2006-2007 Requested Capacity	2007-2008 Requested Capacity	2008-2009 Requested Capacity	2009-2010 Requested Capacity	2010-2011 Requested Capacity	Justification Paragraphs	Membership (referenced school year)
Carrboro	60,832	533	533	533	533	533		537
Enclave	66,952	448	448	448	448	448		438
Eyes Hill	56,299	527	527	527	527	527		495
Glenwood	50,764	423	423	423	423	423		466
FP Graham	66,689	538	538	538	538	538		458
McDougle	98,000	564	564	564	564	564		552
Rushley	95,729	585	585	585	585	585		553
Serrano	90,980	575	575	575	575	575		603
Stowell	52,896	466	466	466	466	466		557
Monte Grove	90,221	0	0	585	585	585		640
Total	729,362	4,659	4,659	5,244	5,244	5,244		5,396

Special Note(s): 1. For the November 15, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planets and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by (1) the School CIP or (2) an amended version of this form that is certified by the BOCC.

Justification:

Capacity Certification:

Neil's Pade 11-16-10
Superintendent Date

Bernadette Peterson 11/11
BOCC Chair Date

Membership Certification:

Neil's Pade 11-16-10
Superintendent Date

Bernadette Peterson 11/11
BOCC Chair Date

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools

SAPFO CAPS Year: November 15, 2010 - November 14, 2011

Capacity and Membership Submittal Date: November 15, 2010

Middle School	Square Feet	2006-2007 Requested Capacity	2007-2008 Requested Capacity	2008-2009 Requested Capacity	2009-2010 Requested Capacity	2010-2011 Requested Capacity	Justification Footnote	Membership (referenced school year)
Culbreth	108,058	670	670	670	670	670		680
McDougle	136,221	732	732	732	732	732		666
Phillips	109,498	706	706	706	706	706		671
South	128,764	732	732	732	732	732		703
Total	482,541	2,840	2,840	2,840	2,840	2,840		2,722

Special Note(s): 1. For the November 15, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planets and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by (1) the School CIP or (2) an amended version of this form that is certified by the BOCC.

Justification:

Capacity Certification:

M. S. Leach 11-17-10
 Superintendent Date

Bernadette Peterson 2/1/11
 BOCC Chair Date

Membership Certification:

M. S. Leach 11-17-10
 Superintendent Date

Bernadette Peterson 2/1/11
 BOCC Chair Date

School APFO Capacity, Membership and Change Request Form**School District:** Chapel Hill-Carrboro City Schools**SAPFO CAPS Year:** November 15, 2010 - November 14, 2011**Capacity and Membership Submittal Date:** November 15, 2010

High School	Square Feet	2006-2007 Requested Capacity	2007-2008 Requested Capacity	2008-2009 Requested Capacity	2009-2010 Requested Capacity	2010-2011 Requested Capacity	Justification Footnote	Membership (referenced school year)
Chapel Hill	241,111	1,520	1,520	1,520	1,520	1,520		1,325
East Chapel Hill	259,869	1,515	1,515	1,515	1,515	1,515		1,423
Carrboro	148,023	0	800	800	800	800		859
Phoenix Acad.	5,207					40		35
Total	654,210	3,035	3,835	3,835	3,835	3,875		3,642

Special Note(s): 1. For the November 15, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planners and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by (1) the School CIP or (2) an amended version of this form that is certified by the BOCC.

Justification: Adding a new high school facility. Phoenix Academy High School became an official high school within the Chapel Hill-Carrboro City Schools starting in the 2010-11 school year.

Capacity Certification:

Miss Peden 11-17-10
Superintendent Date

Bernadette Palmer 2/3/11
BOCC Chair Date

Membership Certification:

Miss Peden 11-17-10
Superintendent Date

Bernadette Palmer 2/3/11
BOCC Chair Date

Section I

C. Membership Date

1. ***Responsible Entity for Suggesting Change*** – Change can be effectuated only by amendment to Memorandum of Understanding (MOU) by all School APFO partners. The Planning Directors, School Representatives, Technical Advisory Committee (SAPFOTAC) may advise if a change in date would improve the reporting or timeliness of the report.
2. ***Definition*** - The date at which student membership is calculated. This date is updated each year and also serves as the basis for projections along with the history from previous years. “For purposes of this Memorandum, the term “school membership” means the actual number of students attending school as of November 15 of each year. The figure is determined by considering the number of students enrolled (i.e. registered, regardless of whether a student is no longer attending school) and making adjustments for withdrawals, dropouts, deaths, retentions and promotions. Students who are merely absent from class on the date membership is determined as a result of sickness or some other temporary reason are included in school membership figures. Each year the School District shall transmit its school membership to the parties to this agreement no later than five (5) school days after November 15.
3.

<i>Standard for:</i> Chapel Hill Carrboro School District <div style="text-align: center;"> November 15 of each year </div>	<i>Standard for:</i> Orange County School District <div style="text-align: center;"> November 15 of each year </div>
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4. ***Analysis of Existing Conditions***
This will be analyzed in the future years to determine if it is an exemplary date.
5. ***Recommendation - No change at this time*** ***Recommendation - No change at this time***

Section II

II. ANNUAL UPDATE TO SCHOOLS ADEQUATE PUBLIC FACILITIES ORDINANCE SYSTEM

A. Capital Investment Plan (CIP)

1. ***Responsible Entity for Suggesting Change*** – The updating of this section will be conducted by the Board of County Commissioners (BOCC) after review of the CIP requests from the School Districts. Action regarding CIP programs usually occurs during the BOCC budget Public Hearing process in the winter and spring of each year. The development of the CIP considers the conditions noted in the SAPFOTAC report released in the same CIP development year including LOS (level of service), capacity, and membership projections.

2. ***Definition*** – The process and resultant program to determine school needs and provide funding for new school facilities through a variety of funding mechanisms.

3. ***Standard for:***

Chapel Hill Carrboro School District Not Applicable	Standard for: Orange County School District Not Applicable
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4. ***Analysis of Existing Conditions***
The MOU outlines a system of implementing the SAPFO, including issuing Certificates of Adequate Public Schools (CAPS) to new development if capacity is available. The Requests for CAPS will be evaluated using the most recently adopted Capital Investment Plan. A new Capital Investment Plan is currently under development for approval prior to June 30, 2011.

5. ***Recommendation*** –
Not subject to staff review

*Section II***B. Student Projection Methodology**

1. ***Responsible Entity for Suggesting Change*** – This section is reviewed and recommended by the Planning Directors, School Representatives, Technical Advisory Committee (SAPFOTAC) to the BOCC for change, if necessary.
2. ***Definition*** – The method(s) by which student memberships are calculated for future years to determine total membership at each combined school level (Elementary, Middle and High School) which take into consideration historical membership totals at a specific time (November 15) in the school year. These methods are also known as ‘models’.
3. ***Standard for:*** ***Standard for:***

Chapel Hill Carrboro School District**Orange County School District**

Presently, the average of five models are being used: namely 3, 5, and 10 year history/cohort survival methods, Orange County Planning Department Linear Wave and Tischler Linear methods. Attachment II.B.1 includes a description of each model.

4. ***Analysis of Existing Conditions***

Performance of the models is monitored each year. The value of a projection model is in its prediction of school level capacities at least three years in advance of capacity shortfalls so the annual Capital Investment Plan (CIP) updates can respond proactively with siting, design, and construction. Attachment II.B.1 includes a description of each model. Attachment II.B.3 shows the performance of the models for the 2010-11 school year from the prior year projection.

5. ***Recommendation*** –

Nine years of projection results are now available. Analysis on the accuracy of the results is showing that some models have better results in one district while others have better results in the other district. The historic growth rate is recorded by the models but projected future growth is more difficult to accurately quantify. In all areas of the county, proposed growth is not included in the SAPFO projection system until actual students begin enrollment. The system is updated in November of each year, becoming part of the historical projection base. This is especially pertinent in the Orange County School District which serves students living within the Orange County portion of the City of Mebane which had had little historic enrollment impact. The significant proposed residential growth occurring within Mebane’s jurisdiction has yet to be fully entered into the historically based projection methods.

STUDENT MEMBERSHIP PROJECTIONS

PROJECTION TYPE	DESCRIPTION / CHARACTERISTICS	FORMULA	ASSUMPTIONS
Tischler Linear (OCS & CHCCS)	Mathematical formula; straight line projection	$y = ((c \cdot b)^x) + b$ y=projected population; c=historical annual change; b=base year; x= projection years	Historical growth is reflected in projected growth
OCP Linear Wave (OCS)	Mathematical linear with percent variation among school levels; reflects progressing waves of membership	$BYM + (BYI + 5(n)) = EYM$ $EYM \cdot \%SL = EYM/SL$ BYM= base year 2nd month membership; BYI=year student membership increment base; EYM=ensuing year membership; n=projection year; %SL=% of total membership per school level (i.e. elementary, middle, high); EYM/SL=ensuing year member by school level	Base year growth reflects 10-year average; increase in BYI of 5 every other year reflects increases in housing growth; reflects buildout constraints
OCP Linear Wave (CHCCS)	Mathematical linear with percent variation among school levels; reflects progressing waves of membership	$BYM + (BYI - 15(n)) = EYM$ $EYM \cdot \%SL = EYM/SL$ BYM= base year 2nd month membership; BYI=year student membership increment base; EYM=ensuing year membership; n=projection year; %SL=% of total membership per school level (i.e. elementary, middle, high); EYM/SL=ensuing year member by school level	Base year growth reflects 10-year average; decrease in BYI of 15 until school year 2010-2011 reflects decreases in housing growth; reflects buildout constraints
3-Year Cohort (OCS & CHCCS)	Mathematical formula that computes the average advancement rate over the previous 3 years for each grade level and then uses each rate to calculate projected membership by school level; an assumed kindergarten membership is based on birth records and/or historical growth rates	$K_n = k_{n-1} + (k_{n-1} \cdot 0.01)$ $n=1$ $a = (\sum G_n / g_{n-1}) / 3$ $n=3$ $b = g_{n-1} (a)$ K=kindergarten membership; n=given school year; G=given grade's membership(other than kindergarten); g= previous grade's membership; a=average advancement rate; b=projected membership	Assumes a 1% annual growth rate for the kindergarten grade level; assumes the same percentage of students in each grade level graduate to the next level each year
5 year Cohort (OCS & CHCCS)	Mathematical formula that computes the average advancement rate over the previous 5 years for each grade level and then uses each rate to calculate projected membership by school level; an assumed kindergarten membership is based on birth records and/or historical growth rates	$K_n = k_{n-1} + (k_{n-1} \cdot 0.01)$ $n=1$ $a = (\sum G_n / g_{n-1}) / 5$ $n=5$ $b = g_{n-1} (a)$ K=kindergarten membership; n=given school year; G=given grade's membership(other than kindergarten); g= previous grade's membership; a=average advancement rate; b=projected membership	Assumes a 1% annual growth rate for the kindergarten grade level; assumes the same percentage of students in each grade level graduate to the next level each year
10 year Cohort (OCS & CHCCS)	Mathematical formula that computes the average advancement rate over the previous 10 years for each grade level and then uses each rate to calculate projected membership by school level; an assumed kindergarten membership is based on birth records and/or historical growth rates	$K_n = k_{n-1} + (k_{n-1} \cdot 0.01)$ $n=1$ $a = (\sum G_n / g_{n-1}) / 10$ $n=10$ $b = g_{n-1} (a)$ K=kindergarten membership; n=given school year; G=given grade's membership(other than kindergarten); g= previous grade's membership; a=average advancement rate; b=projected membership	Assumes a 1% annual growth rate for the kindergarten grade level; assumes the same percentage of students in each grade level graduate to the next level each year

**Orange County School District
School Membership 2009-2010 School Year (November 13, 2009)**

	11/14/08 Actual 2008-09	2009 Report Projection for 2009-10	11/13/09 Actual 2009-10	Change between actual Nov 2008- Nov 2009
Elementary	3165		3211	+46
<u>Model</u>			<u>Projection is</u>	
T		3234	H23	
OCP		3221	H10	
10C		3200	L11	
5C		3206	L5	
3C		3196	L15	
AVG		3211	accurate	
			<u>11/13/2009</u>	
Middle	1601		1665	+64
<u>Model</u>			<u>Projection is</u>	
T		1670	H5	
OCP		1617	L48	
10C		1608	L57	
5C		1619	L46	
3C		1628	L37	
AVG		1628	L37	
			<u>11/13/2009</u>	
High	2242		2217	(25)
<u>Model</u>			<u>Projection is</u>	
T		2245	H28	
OCP		2272	H55	
10C		2175	L42	
5C		2198	L19	
3C		2159	L58	
AVG		2210	L7	
			<u>11/13/2009</u>	
Totals				
Elementary	3165		3211	
Middle	1601		1665	
High	<u>2242</u>		<u>2217</u>	
	7008		7093	+ 85
<u>Model</u>			<u>Projection is</u>	
T		7149	H56	
OCP		7110	H17	
10C		6983	L110	
5C		7023	L70	
3C		6983	L110	
AVG		7050	L43	

H means High

L means Low

Section II

**Orange County School District
School Membership 2009-2010 School Year (November 13, 2009)**

Statistical Findings

PROJECTION TYPE ABBREVIATIONS	
'TISCHLER' LINEAR (T)	10-YEAR COHORT (10C)
ORANGE COUNTY PLANNING (OCP)	5-YEAR COHORT (5C)
	3-YEAR COHORT (3C)

Elementary School Level

- Projections were mixed low and high, ranging from 15 students low to 23 students high. However, the average of the projections were equal to the actual student membership.
- The membership actually increased by 46 students between November 14, 2008 and November 13, 2009.

Middle School Level

- Projections were primarily low, ranging from 57 students low to 5 students high. On average, the projections were 37 students lower than the actual membership.
- The membership actually increased by 64 students between November 14, 2008 and November 13, 2009.

High School Level

- Projections were mixed (low and high) ranging from being low by 58 students to being high by 55 students. On average, the projections were 7 students lower than the actual membership.
- The membership actually decreased by 25 students between November 14, 2008 and November 13, 2009.

TOTAL

- The total of all school level projections were primarily low, ranging from 110 below actual membership to 56 above actual membership. On average, the projections were low by 43 students.
- The membership increased in total by 85 students, which is the sum of +46 at Elementary, + 64 at Middle and (25) at High.

Chapel Hill/Carrboro School District
School Membership 2009-2010 School Year (November 13, 2009)

	11/14/08 Actual 2008-09	2009 Report Projection for 2009-10	11/13/09 Actual 2009-10	Change between actual Nov 2008- Nov 2009
Elementary	5302		5219	(83)
Model			Projection is	
T		5380	H161	
OCP		5400	H181	
10C		5466	H247	
5C		5392	H173	
3C		5390	H171	
AVG		5406	H187	
			11/13/2009	
Middle	2697		2708	+11
Model			Projection is	
T		2727	H19	
OCP		2730	H22	
10C		2796	H88	
5C		2779	H71	
3C		2759	H51	
AVG		2758	H50	
			11/13/2009	
High	3630		3606	(24)
Model			Projection is	
T		3780	H174	
OCP		3739	H133	
10C		3664	H58	
5C		3638	H32	
3C		3663	H57	
AVG		3697	H91	
Totals			11/13/2009	
Elementary	5302		5219	
Middle	2697		2708	
High	3630		3606	
	11629		11533	(96)
Model			Projection is	
T		11887	H354	
OCP		11869	H336	
10C		11926	H393	
5C		11809	H276	
3C		11812	H279	
AVG		11861	H328	

H means High
 L means Low

**Chapel Hill/Carrboro School District
School Membership 2009-2010 School Year (November 13, 2009)**

Statistical Findings

<i>PROJECTION TYPE ABBREVIATIONS</i>	
'TISCHLER' LINEAR (T)	10-YEAR COHORT (10C)
ORANGE COUNTY PLANNING (OCP)	5-YEAR COHORT (5C)
	3-YEAR COHORT (3C)

Elementary School Level

- Projections were all high, ranging from 161 students to 247 students higher than the actual November 13, 2009 membership numbers. On average, the projections were 187 students higher than the actual membership.
- The actual membership decreased by 83 students between November 14, 2008 and November 13, 2009.

Middle School Level

- Projections were all high, ranging from 19 to 88 students higher than the actual membership. On average, the projections were 50 students higher than the actual membership.
- The actual membership increased by 11 students between November 14, 2008 and November 13, 2009.

High School Level

- Projections were all high, by 32 to 174 students. On average, the projections were 91 students higher than the actual membership.
- The actual membership decreased by 24 students between November 14, 2008 and November 13, 2009.

TOTAL

- The total of all school level projections were high, ranging from 276 to 393 students. On average the projections were high by 328 students.
- The membership decreased in total by 96 students, which is the sum of (83) at Elementary, +11 at Middle, and (24) at High.

Section II

Orange County School District
School Membership 2010-11 School Year (November 15, 2010)

	11/13/09 Actual 2009-10	2010 Report Projection for 2010-11	11/15/10 Actual 2010-11	Change between actual Nov 2009- Nov 2010
Elementary	3211		3285	+74
Model			Projection is	
T		3339	H54	
OCP		3265	L20	
10C		3217	L68	
5C		3228	L57	
3C		3222	L63	
AVG		3254	L31	
			11/15/2010	
Middle	1665		1698	+33
Model			Projection is	
T		1696	L2	
OCP		1672	L26	
10C		1713	H15	
5C		1728	H30	
3C		1747	H49	
AVG		1711	H13	
			11/15/2010	
High	2217		2222	+5
Model			Projection is	
T		2258	H36	
OCP		2271	H49	
10C		2198	L24	
5C		2217	L5	
3C		2238	H16	
AVG		2236	H14	
			11/15/2010	
Totals				
Elementary	3211		3285	
Middle	1665		1698	
High	2217		2222	
	7093		7205	+ 112
Model			Projection is	
T		7293	H88	
OCP		7208	H3	
10C		7128	L77	
5C		7173	L32	
3C		7207	H2	
AVG		7201	L4	

H means High

L means Low

Section II

**Orange County School District
School Membership 2010-2011 School Year (November 15, 2010)**

Statistical Findings

<i>PROJECTION TYPE ABBREVIATIONS</i>	
'TISCHLER' LINEAR (T)	10-YEAR COHORT (10C)
ORANGE COUNTY PLANNING (OCP)	5-YEAR COHORT (5C)
	3-YEAR COHORT (3C)

Elementary School Level

- Projections were primarily low, ranging from 68 students low to 54 students high. The average of the projections was 31 students lower than actual student membership.
- The membership actually increased by 74 students between November 13, 2009 and November 15, 2010.

Middle School Level

- Projections were mixed low and high, ranging from 26 students low to 49 students high. On average, the projections were 13 students higher than the actual membership.
- The membership actually increased by 33 students between November 13, 2009 and November 15, 2010.

High School Level

- Projections were mixed (low and high) ranging from being low by 24 students to being high by 49 students. On average, the projections were 14 students higher than the actual membership.
- The membership actually increased by 5 students between November 13, 2009 and November 15, 2010.

TOTAL

- The totals of all school level projections were mixed low and high, ranging from 77 below actual membership to 88 above actual membership. On average, the projections were low by 4 students.
- The membership increased in total by 112 students, which is the sum of +74 at Elementary, + 33 at Middle and +5 at High.

Section II

**Chapel Hill/Carrboro School District
 School Membership 2010-2011 School Year (November 15, 2010)**

	11/13/09 Actual 2009-10	2010 Report Projection for 2010-11	11/15/10 Actual 2010-11	Change between actual Nov 2009- Nov 2010
Elementary	5219		5296	+77
Model			Projection is	
T		5436	H140	
OCP		5350	H54	
10C		5410	H114	
5C		5365	H69	
3C		5346	H50	
AVG		5381	H85	
			11/15/2010	
Middle	2708		2722	+14
Model			Projection is	
T		2761	H39	
OCP		2704	L18	
10C		2767	H45	
5C		2746	H24	
3C		2732	H10	
AVG		2742	H20	
			11/15/2010	
High	3606		3640	+34
Model			Projection is	
T		3677	H37	
OCP		3704	H64	
10C		3649	H9	
5C		3639	L1	
3C		3640	accurate	
AVG		3662	H22	
Totals			11/15/2010	
Elementary	5219		5296	
Middle	2708		2722	
High	3606		3640	
	11533		11658	+125
Model			Projection is	
T		11874	H216	
OCP		11758	H100	
10C		11826	H168	
5C		11750	H92	
3C		11718	H60	
AVG		11785	H127	

H means High
 L means Low

Chapel Hill/Carrboro School District
School Membership 2010-2011 School Year (November 15, 2010)

Statistical Findings

<i>PROJECTION TYPE ABBREVIATIONS</i>	
'TISCHLER' LINEAR (T)	10-YEAR COHORT (10C)
ORANGE COUNTY PLANNING (OCP)	5-YEAR COHORT (5C)
	3-YEAR COHORT (3C)

Elementary School Level

- Projections were all high, ranging from 50 students to 140 students higher than the actual November 15, 2010 membership numbers. On average, the projections were 85 students higher than the actual membership.
- The actual membership increased by 77 students between November 13, 2009 and November 15, 2010.

Middle School Level

- Projections were primarily high, ranging from 18 students low to 45 students higher than the actual membership. On average, the projections were 20 students higher than the actual membership.
- The actual membership increased by 14 students between November 13, 2009 and November 15, 2010.

High School Level

- Projections were primarily high, ranging from 1 student below to 64 students higher than the actual membership. On average, the projections were 22 students higher than the actual membership.
- The actual membership increased by 34 students between November 13, 2009 and November 15, 2010.

TOTAL

- The total of all school level projections were high, ranging from 60 to 216 students. On average the projections were high by 127 students.
- The membership increased in total by 125 students, which is the sum of +77 at Elementary, +14 at Middle, and +34 at High.

Section II

C. Student Projections

1. ***Responsible Entity for Suggesting Change*** – The updating of this section will be conducted by the Planning Directors, School Representatives, Technical Advisory Committee (SAPFOTAC) and referred to the BOCC for annual report certifications.

Projections will be distributed to SAPFO partners for review and comments to the BOCC prior to certification.

2. ***Definition*** – The result of the average of the five student projection models represented by 10 year numerical membership projections by school level (Elementary, Middle, and High) for each school district (Chapel Hill/Carrboro School District and Orange County School District).

- | | |
|--|---|
| <ol style="list-style-type: none"> 3. <i>Standard for:</i>

 Chapel Hill Carrboro School District

 The 5 model average discussed in Section II.B
 (Student Projection Methodology)

 See Attachment II.C.4 | <i>Standard for:</i>

Orange County School District

The 5 model average discussed in Section II.B
(Student Projection Methodology)

See Attachment II.C.3 |
|--|---|

4. ***Analysis of Existing Conditions***

 The membership figures and percentage growth on the attachments show continued growth in both systems. Variability by school level and between the School Districts is also noted. Year-by-year percent growth is shown on the attached table as well as the projected LOS. The projections models were updated using current (November 15) memberships. Ten years of student membership were projected thereafter.

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Chapel Hill Carrboro School District**Elementary**

The previous year (2009-10) projections for November 2010 at this level were overestimated by 85 students. The actual change was an increase of 77 students. Over the previous nine years, this level has shown varying increases in growth. From 2001 until 2003, growth steadily increased; however, in 2004, the increase suddenly fell to an increase of only 3 additional students. In years 2005-06 through 2008-09 student membership increased by over 100 students per year. The projections show the need for Elementary School #11 in 2013-14, versus 2012-13 as projected last year. A site has been acquired for Elementary School #11 with design and permitting largely complete. Efforts are underway to identify construction funding.

In 2007, State Statutes were amended so that effective the 2009-2010 school year, children entering kindergarten must be five years old by August 31st of the year starting school, versus the previous statewide policy date of October 16th. This policy change resulted in a 45 week enrollment period as opposed to the typical 52 week enrollment period for the 2009-10 school year. Consequently, there was a substantial drop in kindergarten enrollment. This year there was the typical 52 week enrollment period, which resulted in a significant increase in kindergarten enrollment over 2009-10.

Middle

The previous year (2009-10) projections for November 2010 for this level were overestimated by 20 students. The actual membership increased by 14. Over the previous nine years, growth decreased precipitously from 214 to 68 to 4, to -52 and then has seen modest increases of +12, +20, +30, +75, + 11, and +14 since 2004. The projections show a need for Middle School #5 in 2018-19, which is two years later than projected last year.

High School

The previous year (2009-10) projections for November 2010 for this level were overestimated by 22 students. The actual membership increased by 34 students. Over the previous nine years,

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change has varied from a high of 199 students to last year's loss of 24 students. Actual real estate market conditions can suppress historical and mathematical trends, which is likely the case in all three school levels within the school system. This year's projections show that additional capacity is not needed in the 10-year projection time frame, whereas last year's projections showed a need in the 2019-20. Additional High School capacity is expected to be achieved by expanding Carrboro High School from 800 students to 1,200 students, as was included in the construction plans for the high school.

Orange County School District

Elementary

The previous year (2009-10) projections for November 2010 at this level were underestimated by 31 students. The actual membership increased by 74 students. Over the previous nine years, this level has experienced erratic enrollment which changed from -185 to +8 to +44 to +71 to -10 to +66 to +86 to +7, +46, and +74 students a year. This created a historical base of negative growth which was captured by the various mathematical models to produce moderate growth projections. In the Orange County school system, historic growth is more closely related to new residential development than in the Chapel Hill-Carrboro School District, which has a sizeable number of new families in older, regentrified housing stock. Therefore, development activity should be monitored off-line as a harbinger to student growth on a more equal level to historically based mathematical models. The need for an additional Elementary School is not anticipated in the 10-year projection period. However, staff is closely monitoring new sizeable residential projects in the Orange County portion of Mebane and Hillsborough.

In 2007, State Statutes were amended so that effective the 2009-2010 school year, children entering kindergarten must be five years old by August 31st of the year starting school, versus the previous statewide policy date of October 16th. This policy change resulted in a 45 week enrollment period as opposed to the typical 52 week enrollment period for the 2009-10 school year. This year there was the typical 52 week enrollment period, which resulted in a significant increase in kindergarten enrollment over 2009-10.

*Section II***Middle**

The previous year (2009-10) projections for November 2010 for this level were overestimated by 13 students. The actual membership increased by 33. Over the previous nine years, growth has varied widely and included an unexpected decrease of 78 students in 2004-05 with smaller decreases each year until 2007-08 and then increasing this year and last. However, certain models did reflect the negative growth (-185) at the elementary school level in 2001-2002 as they progress into the middle school cohorts. The district's third Middle School, Gravelly Hill Middle School, opened in October 2006. The need for an additional Middle School is not anticipated in the 10-year projection period. However, staff is closely monitoring new sizeable residential projects in the Orange County portion of Mebane and Hillsborough.

High School

The previous year (2009-10) projections for November 2010 for this level overestimated by 14 students. The actual membership increased by 5. Over the previous nine years, growth was relatively constant. However, there was a decreased in enrollment in 2009-10 and only modest increase this school year. Even though 4-year historic growth at the high school level is moderate and recognizable, future projections are more moderate because of the slowing of growth at the elementary and middle school levels. The need for an additional High School is not anticipated in the 10-year projection period. However, staff is closely monitoring new sizeable residential projects in the Orange County portion of Mebane and Hillsborough.

Additional Information for Orange County School District

The City of Mebane lies partially within Orange County and students within the Orange County portion of Mebane attend Orange County schools. However, the City of Mebane is not a party to the SAPFO agreement and therefore does not issue CAPS (Certificate of Adequate Public Schools). In previous years, development activity and platting of new subdivisions increased within the Orange County portion of Mebane. However, changing economic conditions may curb this activity.

Increased coordination with the City of Mebane regarding development issues may be necessary in the future. OCS currently has capacity to serve additional growth, but it is possible that

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rampant development in the Orange County portion of Mebane could quickly encumber available capacity.

5. ***Recommendation –***

Use statistics as noted in 3 above

Attachment II.C.2
(2009-10)

1

Country	Year	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046	2047	2048	2049	2050	2051	2052	2053	2054	2055	2056	2057	2058	2059	2060	2061	2062	2063	2064	2065	2066	2067	2068	2069	2070	2071	2072	2073	2074	2075	2076	2077	2078	2079	2080	2081	2082	2083	2084	2085	2086	2087	2088	2089	2090	2091	2092	2093	2094	2095	2096	2097	2098	2099	2100	2101	2102	2103	2104	2105	2106	2107	2108	2109	2110	2111	2112	2113	2114	2115	2116	2117	2118	2119	2120	2121	2122	2123	2124	2125	2126	2127	2128	2129	2130	2131	2132	2133	2134	2135	2136	2137	2138	2139	2140	2141	2142	2143	2144	2145	2146	2147	2148	2149	2150	2151	2152	2153	2154	2155	2156	2157	2158	2159	2160	2161	2162	2163	2164	2165	2166	2167	2168	2169	2170	2171	2172	2173	2174	2175	2176	2177	2178	2179	2180	2181	2182	2183	2184	2185	2186	2187	2188	2189	2190	2191	2192	2193	2194	2195	2196	2197	2198	2199	2200	2201	2202	2203	2204	2205	2206	2207	2208	2209	2210	2211	2212	2213	2214	2215	2216	2217	2218	2219	2220	2221	2222	2223	2224	2225	2226	2227	2228	2229	2230	2231	2232	2233	2234	2235	2236	2237	2238	2239	2240	2241	2242	2243	2244	2245	2246	2247	2248	2249	2250	2251	2252	2253	2254	2255	2256	2257	2258	2259	2260	2261	2262	2263	2264	2265	2266	2267	2268	2269	2270	2271	2272	2273	2274	2275	2276	2277	2278	2279	2280	2281	2282	2283	2284	2285	2286	2287	2288	2289	2290	2291	2292	2293	2294	2295	2296	2297	2298	2299	2300	2301	2302	2303	2304	2305	2306	2307	2308	2309	2310	2311	2312	2313	2314	2315	2316	2317	2318	2319	2320	2321	2322	2323	2324	2325	2326	2327	2328	2329	2330	2331	2332	2333	2334	2335	2336	2337	2338	2339	2340	2341	2342	2343	2344	2345	2346	2347	2348	2349	2350	2351	2352	2353	2354	2355	2356	2357	2358	2359	2360	2361	2362	2363	2364	2365	2366	2367	2368	2369	2370	2371	2372	2373	2374	2375	2376	2377	2378	2379	2380	2381	2382	2383	2384	2385	2386	2387	2388	2389	2390	2391	2392	2393	2394	2395	2396	2397	2398	2399	2400	2401	2402	2403	2404	2405	2406	2407	2408	2409	2410	2411	2412	2413	2414	2415	2416	2417	2418	2419	2420	2421	2422	2423	2424	2425	2426	2427	2428	2429	2430	2431	2432	2433	2434	2435	2436	2437	2438	2439	2440	2441	24
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^(c) YN Incorporated will fund this advance for November 01, 2017 date of availability as indicated by the following Augustus Media Facilities Agreement.

1. The first step in the process of creating a new product is to identify a market need. This involves conducting market research to understand the current market landscape, identify gaps, and determine the target audience. Once a market need is identified, the next step is to develop a concept for the new product. This involves brainstorming ideas, creating a prototype, and testing the concept with potential customers. Once the concept is validated, the next step is to develop a business plan. This involves determining the costs of production, setting a price, and identifying distribution channels. Finally, the product is launched into the market, and the company monitors sales and customer feedback to make any necessary adjustments.

	2009-10	2008-09	2007-08	2006-07	2005-06	2004-05	2003-04	2002-03	2001-02	2000-99	1999-98	1998-97	1997-96	1996-95	1995-94	1994-93	1993-92	1992-91	1991-90	1990-89	1989-88	1988-87	1987-86	1986-85	1985-84	1984-83	1983-82	1982-81	1981-80	1980-79	1979-78	1978-77	1977-76	1976-75	1975-74	1974-73	1973-72	1972-71	1971-70	1970-69	1969-68	1968-67	1967-66	1966-65	1965-64	1964-63	1963-62	1962-61	1961-60	1960-59	1959-58	1958-57	1957-56	1956-55	1955-54	1954-53	1953-52	1952-51	1951-50	1950-49	1949-48	1948-47	1947-46	1946-45	1945-44	1944-43	1943-42	1942-41	1941-40	1940-39	1939-38	1938-37	1937-36	1936-35	1935-34	1934-33	1933-32	1932-31	1931-30	1930-29	1929-28	1928-27	1927-26	1926-25	1925-24	1924-23	1923-22	1922-21	1921-20	1920-19	1919-18	1918-17	1917-16	1916-15	1915-14	1914-13	1913-12	1912-11	1911-10	1910-09	1909-08	1908-07	1907-06	1906-05	1905-04	1904-03	1903-02	1902-01	1901-00	1900-99	1899-98	1898-97	1897-96	1896-95	1895-94	1894-93	1893-92	1892-91	1891-90	1890-89	1889-88	1888-87	1887-86	1886-85	1885-84	1884-83	1883-82	1882-81	1881-80	1880-79	1879-78	1878-77	1877-76	1876-75	1875-74	1874-73	1873-72	1872-71	1871-70	1870-69	1869-68	1868-67	1867-66	1866-65	1865-64	1864-63	1863-62	1862-61	1861-60	1860-59	1859-58	1858-57	1857-56	1856-55	1855-54	1854-53	1853-52	1852-51	1851-50	1850-49	1849-48	1848-47	1847-46	1846-45	1845-44	1844-43	1843-42	1842-41	1841-40	1840-39	1839-38	1838-37	1837-36	1836-35	1835-34	1834-33	1833-32	1832-31	1831-30	1830-29	1829-28	1828-27	1827-26	1826-25	1825-24	1824-23	1823-22	1822-21	1821-20	1820-19	1819-18	1818-17	1817-16	1816-15	1815-14	1814-13	1813-12	1812-11	1811-10	1810-09	1809-08	1808-07	1807-06	1806-05	1805-04	1804-03	1803-02	1802-01	1801-00	1800-99	1799-98	1798-97	1797-96	1796-95	1795-94	1794-93	1793-92	1792-91	1791-90	1790-89	1789-88	1788-87	1787-86	1786-85	1785-84	1784-83	1783-82	1782-81	1781-80	1780-79	1779-78	1778-77	1777-76	1776-75	1775-74	1774-73	1773-72	1772-71	1771-70	1770-69	1769-68	1768-67	1767-66	1766-65	1765-64	1764-63	1763-62	1762-61	1761-60	1760-59	1759-58	1758-57	1757-56	1756-55	1755-54	1754-53	1753-52	1752-51	1751-50	1750-49	1749-48	1748-47	1747-46	1746-45	1745-44	1744-43	1743-42	1742-41	1741-40	1740-39	1739-38	1738-37	1737-36	1736-35	1735-34	1734-33	1733-32	1732-31	1731-30	1730-29	1729-28	1728-27	1727-26	1726-25	1725-24	1724-23	1723-22	1722-21	1721-20	1720-19	1719-18	1718-17	1717-16	1716-15	1715-14	1714-13	1713-12	1712-11	1711-10	1710-09	1709-08	1708-07	1707-06	1706-05	1705-04	1704-03	1703-02	1702-01	1701-00	1700-99	1699-98	1698-97	1697-96	1696-95	1695-94	1694-93	1693-92	1692-91	1691-90	1690-89	1689-88	1688-87	1687-86	1686-85	1685-84	1684-83	1683-82	1682-81	1681-80	1680-79	1679-78	1678-77	1677-76	1676-75	1675-74	1674-73	1673-72	1672-71	1671-70	1670-69
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¹⁹ It is important to note that this reflects the likelihood of a respondent's inclusion in the National Longitudinal Health and Retirement Study, not the likelihood of a respondent's inclusion in the study.

	1970-71	1971-72	1972-73	1973-74	1974-75	1975-76	1976-77	1977-78	1978-79	1979-80	1980-81	1981-82	1982-83	1983-84	1984-85	1985-86	1986-87	1987-88	1988-89	1989-90	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35	2035-36	2036-37	2037-38	2038-39	2039-40	2040-41	2041-42	2042-43	2043-44	2044-45	2045-46	2046-47	2047-48	2048-49	2049-50	2050-51	2051-52	2052-53	2053-54	2054-55	2055-56	2056-57	2057-58	2058-59	2059-60	2060-61	2061-62	2062-63	2063-64	2064-65	2065-66	2066-67	2067-68	2068-69	2069-70	2070-71	2071-72	2072-73	2073-74	2074-75	2075-76	2076-77	2077-78	2078-79	2079-80	2080-81	2081-82	2082-83	2083-84	2084-85	2085-86	2086-87	2087-88	2088-89	2089-90	2090-91	2091-92	2092-93	2093-94	2094-95	2095-96	2096-97	2097-98	2098-99	2099-00	2100-01	2101-02	2102-03	2103-04	2104-05	2105-06	2106-07	2107-08	2108-09	2109-10	2110-11	2111-12	2112-13	2113-14	2114-15	2115-16	2116-17	2117-18	2118-19	2119-20	2120-21	2121-22	2122-23	2123-24	2124-25	2125-26	2126-27	2127-28	2128-29	2129-30	2130-31	2131-32	2132-33	2133-34	2134-35	2135-36	2136-37	2137-38	2138-39	2139-40	2140-41	2141-42	2142-43	2143-44	2144-45	2145-46	2146-47	2147-48	2148-49	2149-50	2150-51	2151-52	2152-53	2153-54	2154-55	2155-56	2156-57	2157-58	2158-59	2159-60	2160-61	2161-62	2162-63	2163-64	2164-65	2165-66	2166-67	2167-68	2168-69	2169-70	2170-71	2171-72	2172-73	2173-74	2174-75	2175-76	2176-77	2177-78	2178-79	2179-80	2180-81	2181-82	2182-83	2183-84	2184-85	2185-86	2186-87	2187-88	2188-89	2189-90	2190-91	2191-92	2192-93	2193-94	2194-95	2195-96	2196-97	2197-98	2198-99	2199-00	2200-01	2201-02	2202-03	2203-04	2204-05	2205-06	2206-07	2207-08	2208-09	2209-10	2210-11	2211-12	2212-13	2213-14	2214-15	2215-16	2216-17	2217-18	2218-19	2219-20	2220-21	2221-22	2222-23	2223-24	2224-25	2225-26	2226-27	2227-28	2228-29	2229-30	2230-31	2231-32	2232-33	2233-34	2234-35	2235-36	2236-37	2237-38	2238-39	2239-40	2240-41	2241-42	2242-43	2243-44	2244-45	2245-46	2246-47	2247-48	2248-49	2249-50	2250-51	2251-52	2252-53	2253-54	2254-55	2255-56	2256-57	2257-58	2258-59	2259-60	2260-61	2261-62	2262-63	2263-64	2264-65	2265-66	2266-67	2267-68	2268-69	2269-70	2270-71	2271-72	2272-73	2273-74	2274-75	2275-76	2276-77	2277-78	2278-79	2279-80	2280-81	2281-82	2282-83	2283-84	2284-85	2285-86	2286-87	2287-88	2288-89	2289-90	2290-91	2291-92	2292-93	2293-94	2294-95	2295-96	2296-97	2297-98	2298-99	2299-00	2300-01	2301-02	2302-03	2303-04	2304-05	2305-06	2306-07	2307-08	2308-09	2309-10
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¹⁰ To be reported in the next volume of the *Journal*. ¹¹ 2005 data of respondents are difficult to find in the *British Migration Policy Institute* (London). ¹² The *White Paper* points to the 'New Nations' of population for both 1970 and 1990. Original problems and a clear point population within studied the 'New European nation' in 1992. ¹³ Annual growth rate calculated using actual membership for years 1950-2004 through 2005/1 membership (population for year 2001). (Image 2002/2)

Section II

D. Student Growth Rate

1. **Responsible Entity for Suggesting Change** – The updating of this section will be conducted by the Planning Directors, School Representatives, Technical Advisory Committee (SAPFOTAC) each year and referred to the BOCC for annual report certification.

Projections will be distributed to SAPFO partners for review and comments to the BOCC prior to certification.

2. **Definition** – The annual percentage growth rate calculated from the projections resulting from the average of the five models represented by 10 year numerical membership projections by school level for each school district. This does not represent the year-by-year growth rate that may be positive or negative but rather the average of the annual growth rates over ten (10) years.

3. **Standard for:****Chapel Hill Carrboro School District**

See Attachment II.D.2

Standard for:**Orange County School District**

See Attachment II.D.2

4. **Analysis of Existing Conditions**

The membership figures and percentage growth on the attachments show continued growth at each school level within the system.

Average Annual Growth Rate over ten years:

Analysis of Existing Conditions

The membership figures and percentage growth on the attachments show continued growth at each school level within the system.

Average Annual Growth Rate over ten years:

Year Projection Made:	2006-07	2007-08	2008-09	2009-10	2010-11
Elementary	2.03%	1.85%	1.5%	1.72%	1.44%
Middle	2.35%	2.58%	2.03%	1.93%	1.67%
High	2.04%	2.31%	2.21%	1.8%	1.57%

Year Projection Made:	2006-07	2007-08	2008-09	2009-10	2010-11
Elementary	1.49%	1.84%	1.16%	1.34%	1.57%
Middle	1.42%	1.78%	1.44%	1.53%	1.84%
High	0.98%	1.49%	1.0%	1.38%	1.59%

5. Recommendation

Use statistics as noted.

Recommendation

Use statistics as noted

2009-2010

Orange County Student Projections

Elementary

School Year	2009-2010 (actual)	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
Membership	3,211	3,254	3,304	3,355	3,373	3,408	3,495	3,538	3,581	3,625	3,668
Average % Increase		1.34%	1.54%	1.54%	0.54%	1.04%	2.55%	1.23%	1.22%	1.23%	1.19%

Middle

School Year	2009-2010 (actual)	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
Membership	1,685	1,711	1,732	1,751	1,787	1,827	1,817	1,816	1,836	1,911	1,937
Average % Increase		2.76%	1.23%	1.1%	2.08%	2.24%	-0.55%	-0.06%	1.1%	4.08%	1.36%

High School

School Year	2009-2010 (actual)	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
Membership	2,217	2,236	2,274	2,298	2,368	2,400	2,425	2,494	2,518	2,494	2,540
Average % Increase		0.86%	1.7%	1.06%	3.05%	1.35%	1.04%	2.85%	0.96%	-0.95%	1.84%

Chapel Hill/Carrboro Student Projections

Elementary

School Year	2009-2010 (actual)	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
Membership	5,219	5,381	5,503	5,604	5,684	5,772	5,915	5,980	6,045	6,116	6,187
Average % Increase		3.1%	2.27%	1.84%	1.43%	1.55%	2.48%	1.1%	1.09%	1.17%	1.16%

Middle

School Year	2009-2010 (actual)	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
Membership	2,708	2,742	2,791	2,848	2,939	3,006	3,004	3,059	3,124	3,243	3,278
Average % Increase		1.26%	1.79%	2.04%	3.2%	2.28%	-0.07%	1.83%	2.12%	3.8%	1.08%

High School

School Year	2009-2010 (actual)	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
Membership	3,606	3,662	3,724	3,792	3,848	3,867	4,000	4,098	4,193	4,206	4,307
Average % Increase		1.55%	1.69%	1.83%	1.48%	0.49%	3.44%	2.45%	2.32%	0.31%	2.4%

Source: S Model Compilation from PSTAC members to determine average based on November 13, 2009 membership numbers and
Orange County Planning and Inspection Department Estimation of Annual Growth Rate

2010-2011

Orange County Student Projections

Elementary

School Year	2010-2011 (actual)	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
Membership	3,285	3,362	3,435	3,473	3,519	3,617	3,661	3,705	3,750	3,795	3,839
Average % Increase		2.34%	2.18%	1.09%	1.34%	2.80%	1.21%	1.20%	1.20%	1.20%	1.17%

Middle

School Year	2010-2011 (actual)	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
Membership	1,698	1,716	1,732	1,786	1,842	1,846	1,864	1,896	1,983	2,011	2,037
Average % Increase		1.08%	0.93%	3.12%	3.11%	0.22%	1.00%	1.67%	4.59%	1.41%	1.30%

High School

School Year	2010-2011 (actual)	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
Membership	2,222	2,263	2,258	2,313	2,349	2,375	2,449	2,503	2,495	2,566	2,599
Average % Increase		1.86%	-0.25%	2.44%	1.57%	1.12%	3.11%	2.19%	-0.30%	2.82%	1.29%

Chapel Hill/Carrboro Student Projections

Elementary

School Year	2010-2011 (actual)	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
Membership	5,296	5,398	5,489	5,557	5,627	5,752	5,821	5,889	5,957	6,031	6,106
Average % Increase		1.93%	1.68%	1.25%	1.27%	2.22%	1.19%	1.17%	1.16%	1.25%	1.24%

Middle

School Year	2010-2011 (actual)	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
Membership	2,722	2,749	2,795	2,879	2,894	2,951	2,993	3,037	3,139	3,175	3,212
Average % Increase		0.98%	1.69%	3.02%	0.49%	1.97%	1.42%	1.47%	3.37%	1.15%	1.15%

High School

School Year	2010-2011 (actual)	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
Membership	3,640	3,687	3,733	3,766	3,846	3,911	3,997	4,093	4,108	4,190	4,252
Average % Increase		1.30%	1.24%	0.88%	2.12%	1.68%	2.20%	2.40%	0.39%	1.99%	1.47%

Source: 5 Model Compilation from PSTAC members to determine average based on November 15, 2010 membership numbers and historical data
 - Orange County Planning and Inspections Department Extraction of Annual Growth Rate from Averages

Section II

E. Student / Housing Generation Rate

1. ***Responsible Entity for Suggesting Change*** – The updating of this section will be conducted by Planning Directors, School Representatives, Technical Advisory Committee (SAPFOTAC) and referred to the BOCC for certification.

Projections will be distributed to SAPFO partners for review and comments to the BOCC prior to certification.

2. ***Definition*** – A projected number of students that are generated from four different types of housing, “single-family detached”, “single-family attached”, “multifamily”, and “manufactured homes”, as defined in Appendix C to the 2007 TischlerBise School Impact Fee Report.

3. ***Standard for:***

Chapel Hill Carrboro School District

See Attachment II.E.1

Standard for:**Orange County School District**

See Attachment II.E.1

4. ***Analysis of Existing Conditions***

On October 6, 2009, the Orange County Board of Commissioners approved the updated Student Generation Rates as recommended by the SAPFOTAC. The newly adopted Student Generation Rates became effective this school year with the November 15, 2010 CAPS system update. The new current standards are shown in Attachment II.E.1.

Also, note that students are generated from new housing as well as from existing housing where new families have moved in. The CAPS system estimates new development impacts and associated student generation but it is important to understand that student increases are a composite of both of these factors. This effect can be dramatic and can vary greatly between areas and districts where either new housing is dominant or new families move into a large inventory of existing housing stock.

5. ***Recommendation – No change***

TischlerBise Student Generation Rates - 2007

Chapel Hill-Carrboro Schools				
	Elementary	Middle	High	All Grades
Single-Family Detached	0.263	0.143	0.197	0.603
Single-Family Attached	0.158	0.077	0.115	0.350
Multifamily	0.038	0.015	0.017	0.070
Manufactured Homes	0.141	0.066	0.061	0.268
All Housing Types	0.149	0.078	0.105	0.332

Orange County Schools				
	Elementary	Middle	High	All Grades
Single-Family Detached	0.168	0.090	0.126	0.384
Single-Family Attached / Multifamily	0.066	0.022	0.034	0.122
Manufactured Homes	0.096	0.041	0.049	0.186
All Housing Types	0.145	0.074	0.102	0.321

Source: School Impact Fees -- Orange County Schools, TischlerBise, December 31, 2007

Section III

III. FLOWCHART OF SCHOOLS ADEQUATE PUBLIC FACILITIES ORDINANCE PROCESS

Abstract: The Schools Adequate Public Facilities Ordinance process has two distinct components:

A. Capital Investment Plan (CIP) (Process 1)

Timeframe: In November of each year, Student Membership and Building Capacity is transmitted from the school districts to the Orange County Board of Commissioners for consideration and approval and used in the following years CIP (e.g. November 15, 2004 membership numbers used to develop a CIP to be considered for adoption in June, 2005).

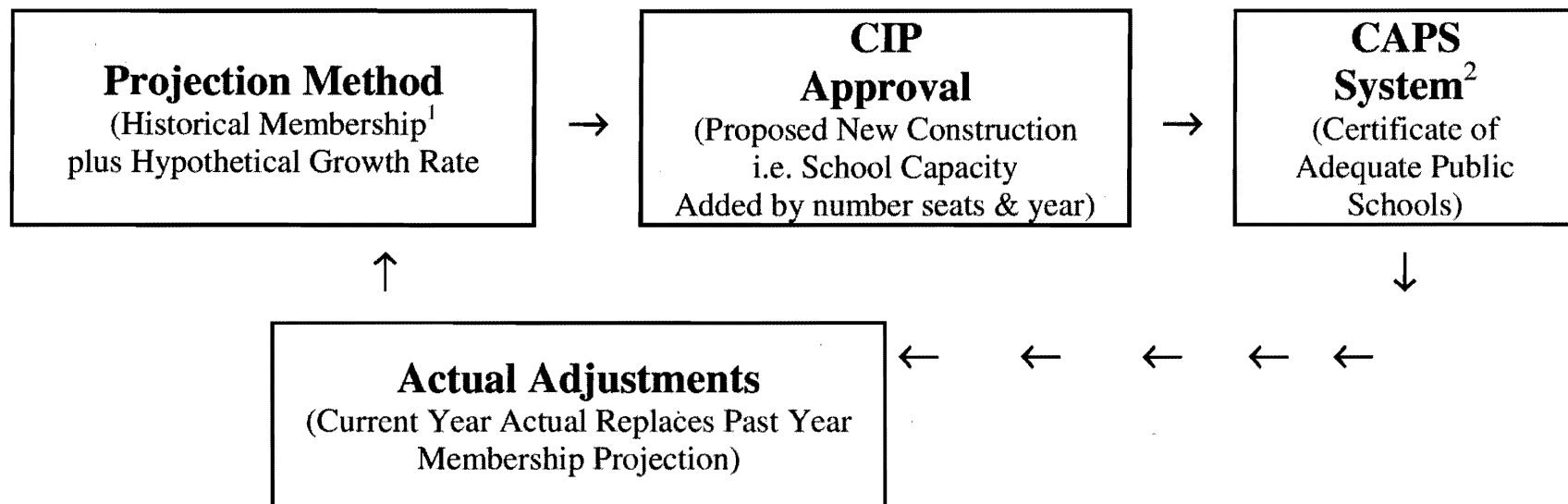
Process Framework

1. SAPFOTAC projects future student membership from historical data, current membership and hypothetical growth rates from established methodologies.
2. School Districts and BOCC compare projections to existing capacity and proposed Capital Investment Plan.
3. SAPFOTAC forwards data and projections to all Schools APFO partners.
4. School Districts develop Capital Investment Plan Needs Assessment during this process
5. The Capital Investment Plan work sessions and Public Hearings are conducted by the BOCC in the spring of each year.
6. The adoption of CIP that sets forth monies and timeframe for school construction (future capacity) by BOCC.

Section III

School Adequate Public Facilities Ordinance

Process 1 - Capital Investment Planning (CIP)



¹Historical Membership is a product of students generated from: (1) pre-existing/approved undeveloped lots where new housing is built, (2) existing housing stock with new families/children, and (3) newly approved housing development (in the future this component will be known as CAPS approved development)

²The only part of the CAPS System (i.e., computer spreadsheet subdivision tracking) that receives data from the Process 1 CIP includes the actual membership (November 15 of preceding CIP year) and new school capacity amount (seats) in a specific year pursuant to the CIP.

Section III

**B. Schools Adequate Public Facilities Ordinance
Certificate of Adequate Public Schools (CAPS)
Update (Process 2)**

Timeframe: The CAPS system is updated approximately November 15 of each year when the school districts report actual membership and 'pre-certified' capacity, whether it is CIP associated or prior 'joint action' agreement. 'Joint action' determinations of changes in capacity due to State rules or other non-construction related items are anticipated to be done prior to the November 15 capacity and membership reporting date. This update may reflect the Board of County Commissioners action on the earlier year Capital Investment Plan (CIP) as it affects capacity and addition of new actual fall membership. The Schools Adequate Public Facilities Ordinance Certificate of Adequate Public Schools (CAPS) stays in effect until the following year – (e.g.: November 15, 2005 to November 14, 2006).

New development is originally logged for a certain year. As the CAPS system is updated, each CAPS projection year is 'absorbed' by the actual estimate of a given year. Later year CAPS projections of the same development remain in the future year CAPS system accordingly. For example, if a 50-lot subdivision is issued a CAPS, 15 lots may be assigned to "Year 1," 10 lots to "Year 2," 10 lots to "Year 3," 10 lots to "Year 4," and 5 lots to "Year 5." When "Year 1" is updated, the students generated from the 15 lots are absorbed by the actual estimate. The students generated in "Years 2, 3, 4, and 5" are held in the CAPS system and added to the appropriate year when the CAPS system is updated.

As was discussed in Section II.C, The City of Mebane is not a party to the SAPFO and does not issue CAPS. However, residential development within the Orange County portion of Mebane has increased dramatically in the last two years and over 1,000 residential lots are currently undeveloped. Increasing development within this area of the county has the potential to encumber a significant portion of the available capacity within the Orange County School District.

Section III

Please note that the two processes (CIP and CAPS) are on separate but parallel tracks. However, the CIP does create a crossover of capacity information between the two processes. For example, the Schools APFO system for both school districts that will be established / initiated / certified each year in November and is based on prior year created and / or planned CIP capacity and current school year membership. The SAPFOTAC report including new current year membership and projections are to be used for upcoming CIP development as noted in Process 1.

CIP Process 1 (for CIP 2009 – 2019)

November 2008 – June 2009 (using 2009 SAPFOTAC Report)

Schools APFO CAPS Process 2 (for Schools APFO System 2009– 2010)

November 2009 - November 2010

Section III

School Adequate Public Facilities Ordinance

Process 2 - Certificate of Adequate Public Schools (CAPS) Allocation

2008 CAPS system is effective November 15, 2007 through November 14, 2008.

The system is updated with new membership, CIP capacity changes, and any other BOCC/School District joint action approved capacity prior to November 15, 2007. This information is received within 5 days of November 15 and posted within the next 15 days. This CAPS system recalibration is retroactive to November 15, 2007.

CAPS Allocation System

1. Certified Capacity
2. LOS Capacity
3. **Actual** Membership
4. Year Start Available Capacity
5. Ongoing Current Available Capacity (includes available capacity decreases from approved CAPS development by year)
6. CAPS approved development
 - a. Total units
 - b. Single Family¹
 - c. Other Housing¹

CAPS System

$$AC^2 = SC^2 - (ADM^2 + ND1^2 + ND2^2 + \dots)$$

$AC \geq 0$ - Issue CAPS

$AC < 0$ - Defer CAPS to later date

¹Student Generation Rates from CAPS housing type create future membership estimate. Please note that this CAPS membership future estimate is different than the projection based on historical data and projection models used in the CIP process 1. This estimate only captures new development impact, which is the component that the SAPFO can regulate.

²AC - Available Capacity - Starts at Annual Update Capacity and reduces as CAPS approved development is entered into the system.

SC - Certified School Level Capacity

ADM - Average Daily Membership

ND - New Development; ND1 means first approved CAPS approved development

ORANGE COUNTY
BOARD OF COMMISSIONERS

ACTION AGENDA ITEM ABSTRACT

Meeting Date: April 5, 2011

Action Agenda

Item No. 5-h

SUBJECT: Schools Adequate Public Facilities Ordinance (SAPFO) – Receipt and Transmittal of 2011 Annual Technical Advisory Committee Report

DEPARTMENT: Planning & Inspections

PUBLIC HEARING: (Y/N)

☐ Yes ☒ No

ATTACHMENT(S):

1. SAPFO Partners Transmittal Letter
2. *Draft 2011 SAPFOTAC Annual Report (Under Separate Cover)*

INFORMATION CONTACT:

Shannon Berry, 245-2589
Craig Benedict, 245-2592

PURPOSE: To receive the 2011 Annual Report of the SAPFO Technical Advisory Committee (SAPFOTAC) and transmit it to the SAPFO partners for comments before certification in June 2011.

BACKGROUND:

1. Annual Report;

Each year the SAPFOTAC Report is updated to reflect actual changing conditions of student membership and school capacity. This information is analyzed and used to project future school construction needs based on adopted levels of service standards. There are two steps to the full report. The first part (Student Membership and Capacity) is certified in the fall and then this full report, in the spring of each year, is to keep the SAPFO system calibrated. At the December 6, 2010 Board of County Commissioners meeting, the Board approved the November 15, 2010 actual membership and capacity numbers (i.e. first part) for both Orange County Schools (OCS) and Chapel Hill-Carrboro City Schools (CHCCS). The BOCC approved revised OCS membership and capacity numbers at the February 1, 2011 meeting.

A draft of the full annual SAPFOTAC Report is complete and has been reviewed by the SAPFOTAC members.

2. SAPFOTAC:

The SAPFOTAC, comprised of representatives of both school systems and the Planning Directors of the County and Towns, is tasked to produce an annual report for the governing boards of each SAPFO partner outlining changes in actual membership, capacity, student projections, and their collective impacts on the Capital Investment Program (CIP) and the future issuance of Certificates of Adequate Public Schools (CAPS). Orange County's Planning Staff compiles the report, holds a meeting discussing the various aspects, and then prepares a draft report, which is reviewed by the SAPFO Technical Advisory Committee.

OCS

Projected needs:

None for Elementary, Middle or High School in the next 10 years

The SAPFOTAC report notes that development approval activity within the portion of the City of Mebane that lies within Orange County has been significant in past years. Because the City of Mebane is not a party to the SAPFO at this time, CAPS are not required by the local government to be issued prior to development approvals. However, once students generated from Mebane development actually enter the school system, faster enrollment increases would affect projections and may identify CIP needs within 10 years, unless enrollment is balanced by slower growth in other areas of the district.

8. Student Generation Rates

On October 6, 2009, the Orange County Board of Commissioners approved the updated Student Generation Rates, as recommended by the SAPFOTAC. The updated Student Generation Rates became effective this school year with the November 15, 2010 CAPS system update. These new rates generally show higher student generation rates for various housing types (see page 42 of attached report for student generation rates).

9. Access to Full Report

The draft SAPFOTAC report will be posted on the Orange County Planning Department's web site. A letter and the Executive Summary of the report will be sent to all SAPFO partners after this BOCC meeting advising them of the availability of the draft report and inviting comment.

It is anticipated the draft 2011 SAPFOTAC report will be brought back to the BOCC for certification at the June 7, 2011 regular meeting.

FINANCIAL IMPACT: Current 10-year student growth projections show future needs for additional schools in the CHCCS District. CHCCS Elementary School #11 is projected to be needed in 2013-14 and CHCCS Middle School #5 is projected to be needed in 2018-19.

Section 7 of the Schools Adequate Public Facilities Memorandum of Understanding (MOU) states, "Orange County will use its best efforts to provide the funding to carry out the Capital Improvement Plan referenced in Section 1 above."

RECOMMENDATION(S): The Manager recommends the Board:

1. Receive the 2011 SAPFOTAC Annual Report; and
2. Authorize the Chair to sign the transmittal letter to SAPFO partners provided at Attachment 1.

SCHOOLS ADEQUATE PUBLIC FACILITIES MEMORANDUM OF UNDERSTANDING

This Memorandum of Understanding is entered into this 17 day of July, 2003, by and between the Town of Carrboro, the Town of Chapel Hill, the Chapel Hill-Carrboro City Board of Education (the "School District") and Orange County.

WHEREAS, the portion of Orange County, served by the Chapel Hill/Carrboro School System has for the past decade been experiencing rapid growth in population; and

WHEREAS, this growth, and that which is anticipated, creates a demand for additional school facilities to accommodate the children who reside within new developments; and

WHEREAS, the responsibility for planning for and constructing new school facilities lies primarily with the Chapel Hill/Carrboro School Board, with funding provided by Orange County; and

WHEREAS, Chapel Hill, Carrboro, Orange County and the Chapel Hill School District, have recognized the need to work together to ensure that new growth within the School District occurs at a pace that allows Orange County and the School District to provide adequate school facilities to serve the children within such new developments;

WHEREAS, the parties have worked cooperatively and developed a system wherein school facilities are currently adequate to meet the needs of the citizens of the county and will continue to maintain a Capital Investment Plan (CIP) that is financially feasible and synchronized with historical growth patterns;

NOW, THEREFORE, the parties to this Memorandum hereby agree as follows:

Section 1. The parties will work cooperatively to develop a realistic Capital Improvement Plan for the construction of schools such that, from the effective date of this Memorandum, school membership within each school level (i.e. elementary, middle or high) does not exceed the following:

Elementary School	105% of Building Capacity
Middle School	107% of Building Capacity
High School	110% of Building Capacity

- a. For purposes of this Memorandum, the term "school membership" means the actual number of students attending school as of November 15 of each year. The figure is determined by considering the number of students enrolled (i.e. registered, regardless of whether a student is no longer attending school) and making adjustments for withdrawals, dropouts, deaths, retentions and promotions. Students who are merely absent from

class on the date membership is determined as a result of sickness or some other temporary reason are included in school membership figures. Each year the School District shall transmit its school membership to the parties to this agreement no later than five (5) school days after November 15. Within fifteen (15) school days after receiving the school membership calculations from the School District, the Board of County Commissioners shall approve the School District's school membership calculations.

- b. For purposes of this Memorandum, "building capacity" will be determined by reference to State guidelines and the School District guidelines (consistent with CIP School Construction Guidelines/policies developed by the School District and the Board of County Commissioners) and will be determined by a joint action of the School Board and the Orange County Board of Commissioners. As used herein the term "building capacity" refers to permanent buildings. Mobile classrooms and other temporary student accommodating classroom spaces are not permanent buildings and may not be counted in determining the school districts building capacity. The School District shall transmit its building capacity to the parties to this agreement no later than five (5) school days after November 15. Within fifteen (15) school days after receiving the building capacity calculations from the School District, the Board of County Commissioners shall approve the School District's building capacity calculations.
- c. Prior to the adoption of the ordinances referenced in Section 2, the parties shall reach agreement on the following:
 - (i) A Capital Improvement Program (CIP) that will achieve the objectives of this Memorandum;
 - (ii) A projected growth rate for student membership within the School District's three school levels during the ten year life of the CIP;
 - (iii) A methodology for determining the projected growth rate for student membership; and
 - (iv) The number of students at each level expected to be generated by each new housing type (i.e., the "student generation rate").
- d. After the adoption of the ordinances referenced in Section 2, the Orange County Board of Commissioners may change the projected student membership growth rate, the methodology used to determine this rate, or the student generation rate if the Board concludes that such a change is necessary to predict growth more accurately. Before making any such change, the Board shall receive and consider the recommendation of a staff committee consisting of the planning directors of the Town(s) and the County and a representative of the School District appointed by the Superintendent. The committee shall provide, in a timely manner, a copy of its recommendation to the governing boards of the other parties to this memorandum at the time it provides such recommendation to the Board of

Commissioners and the Board of Commissioners shall provide an opportunity for those governing Boards to comment on the recommendation. In making its recommendation, the committee shall consider the following, and in making its determination, the Board of Commissioners shall consider the following:

- (i) The accuracy of the methodology and projected growth rate then in use in projecting school membership for the current school year;
- (ii) The accuracy of the student generation rate then in use in predicting the number of students at each level actually generated by each new housing type;
- (iii) Approval of and issuance of CAPS for residential developments that, individually or collectively, are of sufficient magnitude to alter the previously agreed upon school membership growth projections; or
- (iv) Other trends and factors tending to alter the previously agreed upon projected growth rates.

If any such change is made in the projected growth rate, the methodology for determining this rate, or the student generation rate, the Orange County Board of Commissioners shall inform the other parties to this Memorandum prior to February 1st in any year in which such change is intended to become effective what change was made and why it was necessary.

- e. The Orange County Board of Commissioners shall provide a copy of the updated CIP to each of the parties to the Memorandum as soon as it is revised, annually or otherwise.

Section 2. The towns and the county will adopt amendments to their respective ordinances, conceptually similar to that attached hereto as Exhibit A, to coordinate the approval of residential developments within the School District with the adequacy of existing and proposed school facilities.

Section 3. The following process shall be followed by the School District to receive and take action upon applications for Certificates of Adequacy of Public School Facilities ("CAPS") submitted by persons who are required by an implementing ordinance conceptually similar to that attached as Exhibit A to have such certificates before the development permission they have received from the town or county becomes effective.

- a. On November 15th of each year, the School District shall calculate the building capacity of each school level and the school membership of each school level as of November 15th of that year. Also on November 15th of each year, the School District shall calculate the projected building capacity for each school level and the projected school membership for

each school level as of November 15th in each of the following ten years. These calculations shall be made in accordance with the provisions of Section 1.a and Section 1.b. and also in accordance with the remaining provisions of this section.

- b. On November 15th of the year in which the calculation above is made, the school building capacity numbers and the school membership numbers as of November 15th of that year are known figures (i.e. not projections). The twelve month period beginning on November 15th of the year in which the calculation is made and ending on November 14th of the following year is referred to as the "base year."
- c. Projections of school building capacity as of November 15th in each of the ten years following the base year shall be derived from the following:
 - (i) A calculation of the existing building capacity within each school level;
 - (ii) The anticipated opening date of schools under construction;
 - (iii) The anticipated opening date of schools on the ten-year CIP for which funding has been committed by the Board of Commissioners as a result of an approved bond issue, an approved installment purchase agreement, or otherwise; and
 - (iv) The anticipated closing dates of any schools within the School District.
- d. In the first year in which the ordinance adopted pursuant to this Memorandum becomes effective, school membership figures as of November 15th in each of the succeeding ten years shall initially be assumed to be the same school membership figures as are determined for the base year. As CAPS are issued during the base year, school membership figures for the base year and succeeding years shall be modified to reflect the additional students from the developments for which CAPS are issued.
- e. On each November 15th following the first year in which the ordinance adopted pursuant to this Memorandum becomes effective, school membership figures as of November 15th in each of the succeeding ten years shall be determined by adding to the school membership figures for the base year the number of students projected to be added to the schools in each successive year by developments for which CAPS have been issued in accordance with this section.
- f. When an application for a CAPS is submitted, the School District shall determine the impact on school membership for each school level as of November 15th in each year of the period-during which the development is expected to be adding new students to the school system as the result of such new construction. In making this determination, the School District shall rely upon the figures established under Section 1 of this Memorandum as to the number of students at each level expected to be generated by each housing type, and data furnished by the applicable

planning department as to the expected rate at which new dwellings within developments similar in size and type to the proposed development are likely to be occupied. Notwithstanding the foregoing, if, upon request of the applicant, the planning jurisdiction approving the development imposes enforceable conditions upon the development (such as a phasing schedule) to limit the rate at which new dwellings within the development are expected to be occupied, then the School District shall take such limitations into account in determining the impact of the development on school membership.

- g. The School District shall determine the amount of available capacity in each school level as of November 15th in the base year and each November 15th of the succeeding ten years by subtracting from the building capacity numbers for each of those years the student membership numbers for each of those years. The results shall then be compared with the number of students expected to be added to each school level as of November 15th in each year (as determined in accordance with subsection 3.f above). The School District shall make that information known to the parties to this agreement within 15 days of the comparison. If the School District determines that the projected remaining capacity of each school level is sufficient to accommodate the proposed development without exceeding the building capacity levels set forth in Section 1 of this Memorandum then the School District shall issue the CAPS. If the School District determines that the projected capacity of each school level is not sufficient to accommodate the proposed development without exceeding the building capacity levels set forth in Section 1, then the School District shall deny the CAPS. If a CAPS is denied, the applicant may seek approval from the appropriate planning jurisdiction of such modifications to the development as will allow for the issuance of a CAPS, and then reapply for a CAPS.
- h. The School District shall issue CAPS on a "first come first served" basis, according to the date a completed application for a CAPS is received. If projected building capacity is not available and an application for a CAPS is therefore denied, the development retains its priority in line based upon the CAPS application date.

- Section 4. A CAPS issued in connection with approval of a subdivision preliminary plat, minor subdivision final plat, site plan, or conditional or special use permit shall expire automatically upon the expiration of such plat, plan, or permit approval.
- Section 5. The towns and the county will provide to the School District all information reasonably requested by the School District to assist the District in making its determination as to whether the CAPS should be issued.
- Section 6. The School District will use its best efforts to construct new schools and permanent expansions or additions to existing schools in accordance with the CIP.
- Section 7. Orange County will use its best efforts to provide the funding to carry out the Capital Improvement Plan referenced in Section 1 above.

Section 8. In recognition of the fact that some new development will have a negligible impact on school capacity, a CAPS shall not be required under the following circumstances:

- a. For residential developments restricted by law and/or covenant for a period of at least thirty years to housing for the elderly and/or adult care living and/or adult special needs;
- b. For residential developments restricted for a period of at least thirty years to dormitory housing for university students.

If the use of a development restricted as provided above changes, then before a permit authorizing such change of use becomes effective, a CAPS must be issued just as if the development were being constructed initially.

Section 9. The parties acknowledge that this Memorandum of Understanding is not intended to and does not create legally binding obligations on any of the parties to act in accordance with its provisions. Rather, it constitutes a good faith statement of the intent of the parties to cooperate in a manner designed to meet the mutual objective of all the parties that the children who reside within the School District are able to attend school levels that satisfy the level of service standards set forth herein.

The Town of Carrboro and the Town of Chapel Hill intend to remain committed to the MOU only as long as Orange County continues to execute the CIP as agreed in the MOU. If the Carrboro Board of Aldermen finds Orange County is no longer in compliance with the CIP as outlined in the MOU, the Town of Carrboro will no longer consider itself bound by this MOU and may consider repealing the Ordinance referenced in Section 2 of this MOU. If the Chapel Hill Town Council finds Orange County is no longer in compliance with the CIP as outlined in the MOU, the Town of Chapel Hill will no longer consider itself bound by this MOU and may consider repealing the Ordinance referenced in Section 2 of this MOU.

This the 17 day of July, 2003.

TOWN OF CARRBORO

By: Michael R. Niles
Mayor

Attest: Sarah Williams
Town Clerk



TOWN OF CHAPEL HILL

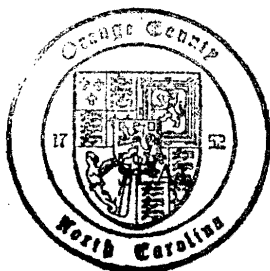
SEAL

By: K.C. F
Mayor

Attest:

Jay A. Smith
Town Clerk

Attest:

Don G
SecretaryTHE CHAPEL HILL-CARRBORO
BOARD OF EDUCATIONBy: Tim Roubicek
Chair

ORANGE COUNTY

By: Margaret W. Brown
Chair, Board of Commissioners

Attest:

Heather Bobb
Clerk to the Board of Commissioners

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ADDENDUM TO SCHOOLS ADEQUATE PUBLIC FACILITIES MEMORANDUM OF UNDERSTANDING

This Addendum to the Schools Adequate Public Facilities Memorandum of Understanding is entered into this 17 day of July, 2003, by and among the Town of Carrboro, the Town of Chapel Hill, the Chapel Hill-Carrboro City Board of Education and Orange County.

WHEREAS, school membership within the high school level in the Chapel Hill-Carrboro City School District for the 2004-2005 school year is projected to exceed 110% of building capacity; and

WHEREAS, a third high school for the Chapel Hill-Carrboro City School District is in the planning stage, on the Orange County 10-year CIP and funding is expected to be committed to the Chapel Hill-Carrboro City Board of Education capital expense fund for this school by Orange County as a result of a combination of bond money, installment financing, impact fees and "pay-as-you-go" CIP revenue; and

WHEREAS, it is anticipated that the third high school in the Chapel Hill-Carrboro City School District will be completed and high school students will begin attending this school when the 2006-2007 school year begins; and

WHEREAS, it is in the interest of the parties to the Schools Adequate Public Facilities Memorandum of Understanding among the Town of Carrboro, the Town of Chapel Hill, the Chapel Hill-Carrboro City Board of Education and Orange County (hereinafter "the MOU") and to the citizens of Orange County that the Schools Adequate Public Facilities Program be implemented for the Chapel Hill-Carrboro City School District in 2003 in tandem with the implementation of the Program for the Orange County School District;

NOW, THEREFORE, the parties to this Addendum to the MOU and to the MOU hereby agree that Section 3.g. of the MOU is amended by deleting Section 3.g. and replacing it with the following:

Section 3.

- g. The School District shall determine the amount of available capacity in each school level as of November 15th in the base year and each November 15th of the succeeding ten years by subtracting from the building capacity numbers for each of those years the student membership numbers for each of those years. The results shall then be compared with the number of students expected to be added to each school level as of November 15th in each year (as determined in accordance with subsection 3.f above). The School District shall make that information known to the parties to this agreement within 15 days of the comparison. If the School District determines that the projected remaining capacity of each school

level is sufficient to accommodate the proposed development without exceeding the building capacity levels set forth in Section 1 of this Memorandum then the School District shall issue the CAPS. If the School District determines that the projected capacity of each school level is not sufficient to accommodate the proposed development without exceeding the building capacity levels set forth in Section 1, then the School District shall deny the CAPS. If a CAPS is denied, the applicant may seek approval from the appropriate planning jurisdiction of such modifications to the development as will allow for the issuance of a CAPS, and then reapply for a CAPS.

For the period of time beginning the effective date of the ordinances referred to in Section 2 of this MOU and terminating on the day on which the third high school within the Chapel Hill-Carrboro City School District is first attended by high school students, the determination by the Chapel Hill-Carrboro City School District that adequate service levels for public schools exist shall be made without regard to whether or not school membership within the High School level exceeds 110% of Building Capacity. On and after the day on which the third high school within the Chapel Hill-Carrboro City School District is first attended by high school students, determination by the Chapel Hill-Carrboro City School District that adequate service levels for public schools exist shall be made only if school membership within each school level does not exceed the following:

Elementary School	105% of Building Capacity
Middle School	107% of Building Capacity
High School	110% of Building Capacity

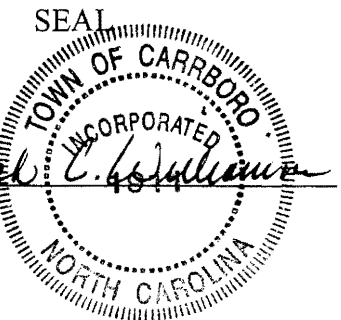
This the 17 day of July, 2003.

TOWN OF CARRBORO

By: Michael R. Nel
Mayor

Attest:

Town Clerk



TOWN OF CHAPEL HILL

SEAL

By: [Signature]
Mayor

Attest: [Signature]
Town Clerk

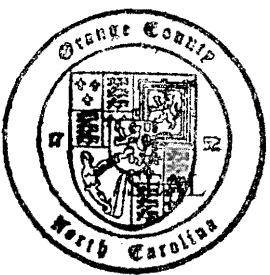


THE CHAPEL HILL-CARRBORO
CITY BOARD OF EDUCATION

By: [Signature], Chair

ATTEST:

[Signature], Secretary



ORANGE COUNTY

By: [Signature]
Chair, Board of Commissioners

Attest: [Signature]
Clerk to the Board of Commissioners

*Art. IV PERMITS AND FINAL PLAT APPROVAL***PART IV. ADEQUATE PUBLIC SCHOOL FACILITIES (JULY 17, 2003)****Section 15-88. Purpose.**

The purpose of this Part IV is to ensure that, to the maximum extent practical, approval of new residential development will become effective only when it can reasonably be expected that adequate public school facilities will be available to accommodate such new development.

Section 15-88.1 Certificate of Adequacy of Public School Facilities.

(a) Subject to the remaining provisions of this part, no approval under this ordinance of a conditional or special use permit for a residential development shall become effective unless and until Certificate of Adequacy of Public School Facilities (CAPS) for the project has been issued by the School District. Notwithstanding the foregoing, this subsection shall not apply to conditional use permits for residential developments less than five lots or dwelling units in the WR, B-5 and WM-3 zoning districts.

(b) A CAPS shall not be required for a general use or conditional use rezoning or for a master land use plan. However, even if a rezoning or master plan is approved, a CAPS will nevertheless be required before any of the permits or approvals identified in subsection (a) of this section shall become effective, and the rezoning of the property or approval of a master plan provides no indication as to whether the CAPS will be issued. The application for rezoning or master plan approval shall contain a statement to this effect.

(c) A CAPS must be obtained from the School District. The School District will issue or deny a CAPS in accordance with the provisions of the Memorandum of Understanding between Carrboro, Chapel Hill, Orange County, and the Chapel Hill Carrboro School District dated July 17, 2003.

(d) A CAPS attaches to the land in the same way that development permission attaches to the land. A CAPS may be transferred along with other interests in the property with respect to which such CAPS is issued, but may not be severed or transferred separately.

Section 15-88.2 Service Levels.

(a) This section describes the service levels regarded as adequate by the parties to the Memorandum of Understanding described in subsection (b) with respect to public school facilities.

(b) As provided in the Memorandum of Understanding between Orange County, Chapel Hill, Carrboro, and the Chapel Hill/Carrboro School District, adequate service levels for public schools shall be deemed to exist with respect to a proposed new residential development if, given the number of school age children projected to reside in that development, and considering all the factors listed in the Memorandum of Understanding, projected school

Art. IV PERMITS AND FINAL PLAT APPROVAL

membership for the elementary schools, the middle schools, and the high school(s) within the Chapel Hill/Carrboro School District will not exceed the following percentages of the building capacities of each of the following three school levels:

Elementary school level	<u>105%</u>
Middle school level	<u>107%</u>
High school level	<u>110%</u>

For the period of time beginning the effective date of this ordinance and terminating on the day on which the third high school within the Chapel Hill-Carrboro City School District is first attended by high school students, the determination by the Chapel Hill-Carrboro City School District that adequate service levels for public schools exist shall be made without regard to whether or not projected capacity of the High School level exceeds 110% of Building Capacity. On and after the day on which the third high school within the Chapel Hill-Carrboro City School District is first attended by high school students, determination by the Chapel Hill-Carrboro City School District that adequate service levels for public schools exist shall be made only if projected capacity of each school level does not exceed the following:

Elementary School	105% of Building Capacity
Middle School	107% of Building Capacity
High School	110% of Building Capacity

For purposes of this ordinance, the terms "building capacity" and "school membership" shall have the same meaning attributed in the Schools Adequate Public Facilities Memorandum of Understanding among the Towns of Carrboro, Chapel Hill, Orange County, and the Chapel Hill/Carrboro Board of Education.

Section 15-88.3 Expiration of Certificates of Adequacy of Public School Facilities.

A CAPS issued in connection with approval of a conditional or special use permit shall expire automatically upon the expiration of such permit approval.

Section 15-88.4 Exemption From Certification Requirement for Development with Negligible Student Generation Rates

In recognition of the fact that some new development will have a negligible impact on school capacity, a CAPS shall not be required under the following circumstances:

- a. For residential developments restricted by law and/or covenant for a period of at least thirty years to housing for the elderly and/or adult care living and/or adult special needs;
- b. For residential developments restricted for a period of at least thirty years to dormitory housing for university students.

Art. IV PERMITS AND FINAL PLAT APPROVAL

If the use of a development restricted as provided above changes, then before a permit authorizing such change of use becomes effective, a CAPS must be issued just as if the development were being constructed initially.

Section 15-88.5 Applicability to Previously Approved Projects and Projects Pending Approval.

(a) Except as otherwise provided herein, the provisions of this part shall only apply to applications for approval of conditional or special use permits that are submitted for approval after the effective date of this ordinance.

(b) The provisions of this part shall not apply to amendments to special or conditional use permit approvals issued prior to the effective date of this ordinance so long as the approvals have not expired and the proposed amendments do not increase the number of dwelling units authorized within the development by more than five percent or five dwelling units, whichever is less.

(c) The Board of Aldermen shall issue a special exception to the CAPS requirement to an applicant whose application for approval of a conditional or special use permit covers property within a planned unit development or master plan project that was approved prior to the effective date of this ordinance, if the Board of Aldermen finds, after an evidentiary hearing, that the applicant has (1) applied to the School District for a CAPS and the application has been denied, (2) in good faith made substantial expenditures or incurred substantial binding obligations in reasonable reliance on the previously obtained planned unit development or master plan approval, and (3) would be unreasonably prejudiced if development in accordance with the previously approved development or plan is delayed due to the provisions of this ordinance. In deciding whether these findings can be made, the Board of Aldermen shall consider the following, among other relevant factors:

- (1) Whether the developer has installed streets, utilities, or other facilities or expended substantial sums in the planning and preparation for installation of such facilities which were designed to serve or to be paid for in part by the development of portions of the planned unit development or master planned project that have not yet been approved for construction;
- (2) Whether the developer has installed streets, utilities, or other facilities or expended substantial sums in the planning and preparation for installation of such facilities that directly benefit other properties outside the development in question or the general public;
- (3) Whether the developer has donated land to the School District for the construction of school facilities or otherwise dedicated land or made improvements deemed to benefit the School District and its public school system;

Art. IV PERMITS AND FINAL PLAT APPROVAL

(4) Whether the developer has had development approval for a substantial amount of time and has in good faith worked to timely implement the plan in reasonable reliance on the previously obtained approval;

(5) The duration of the delay that will occur until public school facilities are improved or exist to such an extent that a CAPS can be issued for the project, and the effect of such delay on the development and the developer.

(d) The decision of the Board of Aldermen involving a special exception application under subsection (c) is subject to review by the Orange County Superior Court by proceedings in the nature of certiorari. Any petition for review by the Superior Court shall be filed with the Clerk of Superior Court within 30 days after a written copy of the decision of the Board of Aldermen is delivered to the applicant and every other party who has filed a written request for such copy with the Clerk to the Board of Aldermen at the time of its hearing on the application for a special exception. The written copy of the decision of the Board of Aldermen may be delivered either by personal service or by certified mail, return receipt requested.

(e) The Mayor or any member temporarily acting as Mayor may, in his or her official capacity, administer oaths to witnesses in any hearing before the Board of Aldermen concerning a special exception.

Section 15-88.6 Appeal of School District Denial of a CAPS.

The applicant for a CAPS which is denied by the School District may, within 30 days of the date of the denial, appeal the denial to the Board of Aldermen. Any such appeal shall be heard by the Board of Aldermen at an evidentiary hearing before it. At this hearing the School District will present its reasons for the denial of the CAPS and the evidence it relied on in denying the CAPS. The applicant appealing the denial may present its reasons why the CAPS application should have, in its view, been approved and the evidentiary basis it contends supports approval. The Board of Aldermen may (1) affirm the decision of the School District, (2) remand to the School District for further proceedings in the event evidence is presented at the hearing before the Board of Aldermen not brought before the School District, or (3) issue a CAPS. The Board of Aldermen will only issue a CAPS if it finds that the CAPS should have been issued by the School District as prescribed in the Memorandum of Understanding among the School District, Orange County and the towns of Carrboro and Chapel Hill. A decision of the Board of Aldermen affirming the School District may be appealed by the applicant for a CAPS by proceedings in the nature of certiorari and as prescribed for an appeal under section 15-88.5 of this part.

Section 15-88.7 Information Required From Applicants.

The applicant for a CAPS shall submit to the School District all information reasonably deemed necessary by the School District to determine whether a CAPS should be issued under the provision of the Memorandum of Understanding. An applicant for a CAPS special exception

Art. IV PERMITS AND FINAL PLAT APPROVAL

or an applicant appealing a CAPS denial by the School District shall submit to the Board of Aldermen all information reasonably deemed necessary by the Board of Aldermen to determine whether a special exception should be granted as provided in Section 15-88.5 or for the hearing of an appeal of a School District denial of a CAPS as provided in Section 15-88.6. A copy of a request for a CAPS special exception or of an appeal of a School District denial of a CAPS shall be served on the superintendent of the School District. Service may be made by personal delivery or certified mail, return receipt requested.

Section 15-89 through 15-90 Reserved.