



Town of Carrboro

Town Hall
301 W. Main St.
Carrboro, NC 27510

Meeting Agenda Board of Aldermen



Tuesday, April 15, 2014

7:30 PM

Board Chambers - Room 110

- A. REQUESTS FROM VISITORS AND SPEAKERS FROM THE FLOOR
- B. RESOLUTIONS, PROCLAMATIONS, AND ACKNOWLEDGEMENTS

7:30-7:35

C. CONSENT AGENDA

- 1. **14-0112** A request to adopt a resolution to award retired Police K9 Kilo to Handler Sergeant James Walker.
Attachments: Kilo_Resolution.docx
Kilo Agreement.pdf
- 2. **14-0116** NCLM Regulatory Technical Assistance Fund Contribution

PURPOSE: The purpose of this item is to allow the Board of Aldermen to approve an expenditure of \$560.00 to support the NCLM Regulatory Technical Assistance Fund.
Attachments: A RESOLUTION APPROVING AN EXPENDITURE TO THE NCLM REGULATORY TECHNICAL ASSISTANCE FUND.docx
Carrboro REG-TAF.pdf
- 3. [14-0125](#) Permit Extension Request for Previously Issued Conditional Use Permit for Veridia AIS

PURPOSE: The Board is asked to consider approving a request for an extension of the date when a Conditional Use Permit would otherwise expire for Veridia AIS CUP. The Town Staff recommends approval of the request.
Attachments: [Veridia-CUP-PermitExtensionRequest-Resolution-2014](#)
[RequestForExtensionLetter-2014](#)
[CUPDocument-Attachment](#)

D. OTHER MATTERS

7:35-8:00

- 1. [14-0123](#) Discussion of a Downtown Parking Summit on Shared Parking

PURPOSE: The purpose of this item is to update the Board on the comments and outcomes of the Downtown Parking Summit meeting that was held on January 31, 2014.

Attachments: [Attachment A- Resolution 12-10-13](#)
[Attachment B - Parking Inventory](#)
[Attachment C - Downtown Parking Survey](#)
[Attachment D SharedParking map](#)
[Attachment E - Notes from Parking Summit](#)

8:00-8:30

2. 14-0122 Update on East Weaver Street Bike Corral Trial Installation

PURPOSE: The Board of Aldermen is asked to receive a report and consider options for the bike corral that has been installed on a trial basis since August on E. Weaver St.

Attachments: Attachment A - Resolution - Bike Corral - April 2014
Attachment B - Memo - Bike Corral - April 2014
Attachment C - E Weaver St parking utilization and destination graphics

8:30-8:50

3. [14-0126](#) Review of the 2014 Annual Report on the Schools Adequate Public Facilities Ordinance (SAPFO) from the Technical Advisory Committee

PURPOSE: The Orange County Board of County Commissioners has referred the 2014 report for review and comments. The Board of Commissioners is scheduled to certify the report in May and has requested comments from signatories to the Memorandum of Understanding by April 21, 2014. A resolution that provides an opportunity for the Board of Aldermen to specify comments has been prepared.

Attachments: [Attachment A - SAPFOTAC Report 4-15-14](#)
[Attachment B - SAPFO Transmittal 2014](#)
[Attachment C - 2014 SAPFOTAC Report.pdf](#)
[Attachment D - LUO Sec 15-88-15-88.7 and MUO](#)
[Attachment E - CAPS Memo - 2014](#)

8:50-9:05

E. MATTERS BY BOARD MEMBERS

1. 14-0089 Brief Monthly Report/Update from Members of the Board

F. MATTERS BY TOWN CLERK

G. MATTERS BY TOWN MANAGER

H. MATTERS BY TOWN ATTORNEY



Town of Carrboro

Town Hall
301 W. Main St.
Carrboro, NC 27510

Legislation Text

File #: 14-0112, **Version:** 1

TITLE:

A request to adopt a resolution to award retired Police K9 Kilo to Handler James Walker

PURPOSE: Due to his age, Sergeant James Walker's K9 partner Kilo, will retire after 9 years of service to the Carrboro Police Department, and the Town of Carrboro.

DEPARTMENT: Police

CONTACT INFORMATION: Chief Walter Horton, 919-918-7408

INFORMATION: In accord with North Carolina General Statute, 160A-266 declares K-9 Allie to be surplus property upon retirement from service and authorizes his assigned handler, James Walker, to take ownership of K-9 Kilo upon his execution of a hold harmless agreement to provide proper care for the dog for the remainder of the life of the animal. By executing that agreement, James Walker will assume all liability and responsibility for the dog. The Board has previously awarded a retiring Police K9 to the handler free of charge. Town staff recommends that the Board of Aldermen award Sergeant James Walker, K9 Kilo.

FISCAL & STAFF IMPACT: The value of K9 Kilo is \$300.00

RECOMMENDATION: Staff recommends that the Board approve the attached resolution.

K-9 Retirement Resolution:

WHEREAS, K-9 Kilo is owned by the Town of Carrboro; and

WHEREAS, K-9 Kilo has faithfully served the Town and its citizens for 9 years; and

WHEREAS, K-9 Kilo will retire from his position as Police Canine effective April 22nd, 2014; and

WHEREAS, the Mayor and Board of Aldermen, by this resolution, wish to express its great appreciation to K-9 Kilo for service, loyalty, and dedication to the Town of Carrboro;

NOW THEREFORE, BE IT RESOLVED that the Town of Carrboro in accord with North Carolina General Statute 160A-266 declares K-9 Kilo to be surplus property upon retirement from service and authorizes his assigned handler, James Walker, to take ownership of K-9 Kilo upon his execution of a hold harmless agreement to provide proper care for the dog for the remainder of the life of the animal By executing that agreement James Walker will assume all liability and responsibility for the dog.

Witness my hand and seal of the Town of Carrboro this 15th day of April 2014



Town of Carrboro

Walter Horton, Chief of Police
100 N. Greensboro St.
Carrboro, NC 27510

PHONE: 919-918-7397



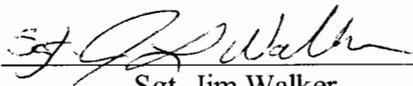
Police Department

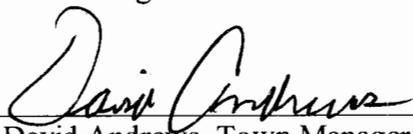
FAX: 919-942-4473

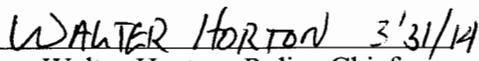
MEMORANDUM OF AGREEMENT FOR TRANSFER OF OWNERSHIP OF POLICE CANINE

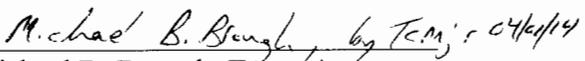
Police canine Kilo Walker is no longer useful or necessary for law enforcement purposes due to his age. The dog is neither qualified to be retrained with a new handler nor able to continue to function as a police canine; therefore, he is of no economic value to the Town of Carrboro. As a result, ownership and possession of Kilo Walker is hereby transferred to Sergeant Walker and he agrees to the following conditions:

1. Sergeant Walker assumes full responsibility for Kilo's welfare, including but not limited to providing adequate shelter, food, grooming, and veterinary care.
2. Sergeant Walker will, under no circumstances, use Kilo for any type of financial gain.
3. Sergeant Walker is aware of the general background, training, and utilization of Kilo by the Carrboro Police Department and, being so informed, is fully cognizant of any and all risks associated with assuming ownership and possession of Kilo. Sergeant Walker does hereby release, forever discharge and covenant not to sue the Town of Carrboro, the Carrboro Police Department, and all past, present, and future employees, elected and appointed officials, contractors, agents, and representatives of the Town of Carrboro from any and all claims, demands, damages, causes of actions, liabilities, and judgments arising from or related in any way to the ownership, possession, use, condition, actions, activities, transfer or sale of Kilo; and does hereby further agree to defend, indemnify, hold and save the Town of Carrboro, the Carrboro Police Department, and all past, present, and future employees, elected and appointed officials, contractors, agents, and representatives of the Town of Carrboro free and harmless from any and all claims, demands, damages, causes of action, liabilities, and judgments arising from or related in any way to the ownership, possession, use condition, actions, activities, transfer or sale of Kilo.


Sgt. Jim Walker


David Andrews, Town Manager


Walter Horton, Police Chief


Michael B. Brough, Town Attorney



Town of Carrboro

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Carrboro, NC 27510

Legislation Text

File #: 14-0116, **Version:** 1

TITLE:

NCLM Regulatory Technical Assistance Fund Contribution

PURPOSE: The purpose of this item is to allow the Board of Aldermen to approve an expenditure of \$560.00 to support the NCLM Regulatory Technical Assistance Fund.

DEPARTMENT: Town Clerk

CONTACT INFORMATION: Cathy Wilson

INFORMATION: The NCLM Regulatory Technical Assistance Fund (REG-TAF) is a program created to protect N.C. municipalities' interests in water quality and electric regulatory issues. REG-TAF funds were used to hire external technical and legal support for the ongoing Duke Energy Carolinas and Progress Energy Carolinas rate cases. The NCLM REG-TAF is instrumental in the NCLM's work regarding LED rates and availability for the Town of Carrboro. Additional information regarding the REG-TAF is attached.

FISCAL & STAFF IMPACT: The expenditure of \$560.00 should come from the Board of Aldermen's FY 13-14 budget.

RECOMMENDATION: It is recommended that the Mayor and Board review the materials and approve the expenditure of \$560.00 showing the Town's continued support of the NCLM REG-TAF program.

A RESOLUTION APPROVING AN EXPENDITURE TO THE NCLM REGULATORY TECHNICAL ASSISTANCE FUND (REG-TAF)

WHEREAS, the NCLM supports municipalities across the state; and,

WHEREAS, the NCLM Regulatory Technical Assistance Fund has supplied external technical assistance in the League's interventions in both the Progress Energy Carolinas and Duke Energy Carolinas rate cases before the North Carolina Utilities Commission; and,

WHEREAS, the League's intervention in the Duke Energy Carolinas rate case is ongoing and the League continues to press Duke Energy Carolinas for an LED streetlight rate for cities and towns that would make it financially feasible to obtain the more energy-efficient technologies.

NOW, THEREFORE BE IT RESOLVED, by the Carrboro Board of Aldermen that a contribution of \$560.00 to the NCLM REG-TAF fund is approved from the FY 13/14 budget.

North Carolina League of Municipalities Regulatory Technical Assistance Fund (REG-TAF)

In response to member interest, the League of Municipalities (League) is requesting voluntary contributions for the Regulatory Technical Assistance Fund (REG-TAF). REG-TAF is an annual joint action program created to protect N.C. municipalities' collective interests by hiring external technical support for water quality and electric regulatory issues. REG-TAF comes after the success of two previous League member-supported joint action programs—the Municipal Environmental Assessment Coalition (MEAC) and the North Carolina Municipal Energy Group (NC-MEG):

- In 2010, the League formed MEAC, a coalition comprised of more than 130 cities and towns, to accurately analyze data on the state's proposed limits on wastewater discharges and increased stormwater regulations. MEAC commissioned a study that estimated the cost of complying with the proposed standards at \$2 billion statewide. Based on this study, the League successfully pushed the state to implement alternative policies that minimized the financial impact of these regulations so that most cities will not need to pay for expensive wastewater plant upgrades and stormwater program expansions.
- In 2013, the League formed NC-MEG, a coalition of more than 100 League members, to hire specialized outside legal counsel in the League's interventions in both the Progress Energy Carolinas (PEC) and Duke Energy Carolinas (DEC) rate cases before the North Carolina Utilities Commission (NCUC). The League's interventions reduced the financial burden of rate increases on municipal budgets, particularly in those cities and towns providing services such as water and wastewater treatment, street lighting, traffic signals, and recreational facilities. The NCUC issued an order in the PEC rate case in May of 2013, and the overall rate increase to municipalities was less than 5%, a reduction of 50% from PEC's original requested rates. The League's involvement in the DEC rate case is ongoing; however, the League's intervention minimized the impact of DEC's initial rate increase proposal on municipal operations and the League continues to press DEC for an LED streetlight rate for cities and towns that would make it financially feasible for them to swap out old streetlight technologies for more energy-efficient technologies.

About REG-TAF

- Annual voluntary joint action program created to protect N.C. municipalities' collective interests on regulatory issues.
- Builds upon two successful initiatives that led to significant cost savings for municipalities.
- Funds will be spent as needed to support water quality and/or electric regulatory issues.
- More than 100 League members participated in similar initiatives.

The League membership prioritized these regulatory actions and has now asked the League to build on the successes of MEAC and NC-MEG by organizing an annual joint action program for municipalities to band together to hire outside technical support and expertise for water quality and electric regulatory issues. As explained on the reverse, the suggested cost share depends on the potential benefit a municipality or authority will receive from joint regulatory technical assistance, given its electric consumption, wastewater generation, and stormwater controls.

See the attached member participation form to determine your suggested contribution for participation. REG-TAF will be a continuing program comprised of annual contributions. In some years, the funds will support both water quality and electric regulatory issues, and in other years, funds may only be spent on one issue. Funds will be expended at the direction of an oversight committee comprised of members of the League's Board of Directors with suggestions from all REG-TAF participants.

The submission of this participation form is an agreement to participate in REG-TAF. Deadline for submitting this participation form is August 1, 2014.

**North Carolina League of Municipalities
Regulatory Technical Assistance Fund (REG-TAF)
Member Participation Form**

By signing the participation agreement below, the preparer agrees on behalf of his/her municipality/ authority to participate in the League's Regulatory Technical Assistance Fund program and to submit the suggested contribution by August 1, 2014.

Program Contact: _____

Contact's phone: _____

Contact's Email: _____

Preparer's Signature: _____

Date of Request: _____

Name of Preparer: _____

Position Title: _____

Municipality: Carrboro _____

Address: _____

Suggested Contribution: \$ 559.72

Other amount: _____

Please submit this form and payment to:
North Carolina League of Municipalities*
PO Box 742106
Atlanta, GA 30374-742106

* This Atlanta address is where NCLM receives payments

If you have any questions, contact:
Sarah Collins
Regulatory Affairs Associate
(919) 715-2919
scollins@ncml.org

**North Carolina League of Municipalities
Regulatory Technical Assistance Fund (REG-TAF)
Suggested Contribution Calculation**

Suggested contributions are set based on the potential benefit a municipality or authority will receive from regulatory technical assistance, given its electric consumption, wastewater generation, and stormwater controls. Your organization’s suggested contribution was determined using the schedules below. If you have any questions, contact Sarah Collins, Regulatory Affairs Associate, at (919) 715-2919/scollins@ncmlm.org.

SCHEDULE A (electric consumption)

Population	Number of Services*	Suggested Contribution
150,000 +	4	\$6,000.00
75,000 - 149,999	4	\$3,000.00
25,000 - 74,999	4	\$2,000.00
10,000 - 24,999	4	\$1,000.00
0 - 10,000	4	\$500.00

Population	Number of Services*	Suggested Contribution
150,000 +	3	\$4,500.00
75,000 - 149,999	3	\$2,250.00
25,000 - 74,999	3	\$1,500.00
10,000 - 24,999	3	\$750.00
0 - 10,000	3	\$150.00

Population	Number of Services*	Suggested Contribution
150,000 +	2	\$3,000.00
75,000 - 149,999	2	\$1,500.00
25,000 - 74,999	2	\$1,000.00
10,000 - 24,999	2	\$500.00
0 - 10,000	2	\$100.00

Population	Number of Services*	Suggested Contribution
150,000 +	1 (or less)	
75,000 - 149,999	1 (or less)	
25,000 - 74,999	1 (or less)	\$500.00
10,000 - 24,999	1 (or less)	\$250.00
0 - 10,000	1 (or less)	\$50.00

(Electricities do not have a suggested contribution from Schedule A)

SCHEDULE B (wastewater generation)

NPDES Permitted Flow*	Suggested Contribution
25 MGD+	\$1,000.00
10 - 24.99 MGD	\$750.00
5 - 9.99 MGD	\$500.00
1 - 4.99 MGD	\$400.00
0.5 - 0.99 MGD	\$250.00
Under 0.5 MGD	\$150.00

* If Unlimited, use actual peak

SCHEDULE C (stormwater)

Certified 11-12 Population	Suggested Contribution
Multiply by .003	59.72

Suggested Contribution Calculation

Amount From Schedule A	\$ 500.00
Amount From Schedule B	-
Amount From Schedule C	\$ 59.72
Total Suggested	\$ 559.72

* Schedule A - the “Number of Services” is the total number of electric generating services you provide:

- Street Lighting
- Wastewater Treatment
- Water Treatment
- Recreation Facilities/Ball Field Lighting



Town of Carrboro

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Legislation Text

File #: 14-0125, **Version:** 1

TITLE:

Permit Extension Request for Previously Issued Conditional Use Permit for Veridia AIS

PURPOSE: The Board is asked to consider approving a request for an extension of the date when a Conditional Use Permit would otherwise expire for Veridia AIS CUP. The Town Staff recommends approval of the request.

DEPARTMENT: Planning

CONTACT INFORMATION: Marty Roupe, 918-7333

INFORMATION: On behalf of Sustainable Properties, LLC, Mr. David Bell has requested an extension of the date on a previously issued Conditional Use Permit (CUP) which would otherwise expire on April 26, 2014. The Board of Aldermen originally granted this CUP on April 26, 2011. The permit allows construction of a major subdivision consisting of 39 residential dwelling units. Construction of the project has not commenced.

FISCAL & STAFF IMPACT: The applicant has paid the applicable fee associated with this request. No other impact noted.

RECOMMENDATION: The Town Staff recommends that the Board of Aldermen adopt the attached resolution approving the permit extension request. The new expiration date for the permit would be April 26, 2015.

A RESOLUTION APPROVING AN EXTENSION OF THE DATE ON WHICH A
CUP WOULD OTHERWISE EXPIRE FOR VERIDIA AIS CUP

WHEREAS, the Carrboro Board of Aldermen approved a Conditional Use Permit for the Veridia AIS CUP on April 26, 2011; and

WHEREAS, the Carrboro Board of Aldermen approved an extension to the date on which the Conditional Use Permit for the Veridia AIS CUP would have expired, thereby extending the date to April 26, 2014; and

WHEREAS, the Board of Aldermen finds, per Section 15-62(c) of the LUO, that: 1) the CUP has not yet expired, 2) the permit recipient has proceeded with due diligence and in good faith, and 3) conditions have not changed so substantially as to warrant a new application.

NOW, THEREFORE BE IT RESOLVED by the Carrboro Board of Aldermen that the permit is again extended, with a new expiration date for Veridia AIS CUP of April 26, 2015.

This the 15th day of April, 2014

**SUSTAINABLE PROPERTIES, LLC
5000 WALNUT COVE ROAD
CHAPEL HILL, NC 27516**

March 24, 2014

Town of Carrboro Planning Department
301 West Main Street
Carrboro, NC 27510
Attn: Martin Roupe

Re: Veridia AIS Subdivision – Permit Extension Request

Dear Marty,

As owner of Sustainable Properties, LLC, I request an additional extension of the CUP Permit for the Veridia AIS Subdivision that was originally approved by the Board on April 26, 2011. A summary of the need for this extension is provided below.

In broad terms, this extension is necessary because economic conditions, while slowly improving, have not yet reached pre-recession levels and green building in general has been slow to make a comeback. None of the lending institutions we have been in contact with have expressed an appetite for financing a development of Veridia's unique nature: featuring a progressive (and unfamiliar) development plan and cost structure. In addition, options for partnerships and private financing have been limited. Within the local development community, acquisitions continue to be dominated by buyouts of land at a low cost basis for future development, as there remains a moderate supply of development sites owned by individuals and groups that are overleveraged and selling at significant losses.

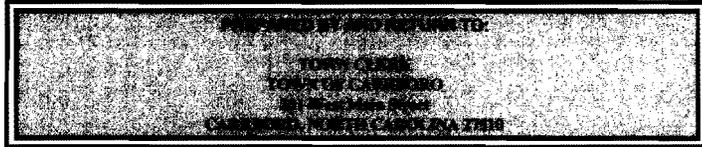
Despite these factors, Sustainable Properties, LLC is poised now to re-evaluate the structural elements of Veridia and pursue potential funding sources both through traditional banking channels and private investments. The outlook is positive in the mid-long term as an appetite for sustainable building returns, innovative and less costly products come on the market, and the general economy continues to improve. I welcome input from the town to help make this truly first of its kind sustainable community a reality for Carrboro. Sustainable Properties, LLC remains committed to seeing the approved CUP developed into the model of green, planned-use development that it was designed to be.

Please let me know if you have any questions regarding this request or require further information or documentation of the above.

Sincerely,

A handwritten signature in cursive script that reads "David Bell".

David Bell
Sustainable Properties, LLC



**ORANGE COUNTY
NORTH CAROLINA**

**TOWN OF CARRBORO
CONDITIONAL USE PERMIT GRANTED
Veridia Architecturally Integrated Subdivision**

On the date(s) listed below, the Board of Aldermen of the Town of Carrboro met and held a public hearing to consider the following application:

APPLICANT: Sustainable Properties, LLC
OWNERS: Sustainable Properties, LLC
PROPERTY LOCATION (Street Addresses): 810 Old Fayetteville Road
TAX MAP, BLOCK, LOT(S): 7.108.41 and 7.108.32 (PIN #s 9779017345 and 9779017407)
PROPOSED USE OF PROPERTY: Major subdivision consisting of 1.111, single family detached residences
CARRBORO LAND USE ORDINANCE USE CATEGORY: 26.100
MEETING DATES: April 26, 2011

Having heard all the evidence and arguments presented at the hearing, the Board finds that the application is complete, that the application complies with all of the applicable requirements of the Carrboro Land Use Ordinance for the development proposed, and that therefore the application to

make use of the above-described property for the purpose indicated is hereby approved, subject to all applicable provisions of the Land Use Ordinance and the following conditions:

1. The applicant shall complete the development strictly in accordance with the plans submitted to and approved by this Board, a copy of which is filed in the Carrboro Town Hall. Any deviations from or changes in these plans must be submitted to the Development Review Administrator in writing and specific written approval obtained as provided in Section 15-64 of the Land Use Ordinance.
2. If any of the conditions affixed hereto or any part thereof shall be held invalid or void, then this permit shall be void and of no effect.
3. That 35 of the 39 homes shall be offered for a pre-construction base price of less than \$300,000. To secure a home at this rate, interested buyers must pay a deposit and meet the "qualified buyer" lending requirements of the financial institution funding the project's development. Upon being offered a home at this price, a potential buyer may choose to negotiate with the seller the purchase of a home at a higher price established relative to the market value of desired modifications and additions to the base price home's offerings. This restriction shall remain for any sales realized prior to construction beginning or within a one-year period following construction plan approval, whichever comes first. After the restriction expires, the maximum base price may increase three-percent (3%) annually to allow for inflation and building cost increases.
4. That the construction plans and final plat for the project must exhibit compliance with LUO Section 15-188, as written at the time of each respective approval.
5. That prior to construction plan approval, the applicant receive a driveway permit from NCDOT.
6. That the Board of Aldermen finds the provision of 68 parking spaces, within carport bays and parallel and perpendicular to the driveway, sufficient to serve Veridia development's 39 single-family homes. The Board makes this finding based on information provided by the applicant noting proximity to schools, shopping, parks, and a bus stop.
7. That the HOA documents for the development must include provisions requiring that the carport bay areas must remain available for parking of a vehicle.
8. That the applicant shall provide to the Zoning Division, prior to the recordation of the final plat for the project or before the release of a bond if some feature are not yet in place at the time of the recording of the final plat, Mylar and digital as-builts for the stormwater features of the project. Digital as-builts shall be in DXF format and shall include a base map of the whole project and all separate plan sheets. As-built DXF files shall include all layers or tables containing storm drainage features. Storm drainage features will be clearly delineated in a data table. The data will be tied to horizontal controls.
9. That prior to construction plan and final plat approvals, the developer shall submit detailed stormwater system maintenance information: maintenance and operations plan and manual, maintenance agreement, etc, in accordance with the requirements of LUO Section 15-263.1. The information must be reviewed and approved by the Town Engineer, Town Attorney, and Environmental Planner. Upon approval, the plans shall be included in the homeowners' association documentation.
10. That the construction entrance for the project must be clearly identified on the construction plans.
11. That the construction plans must call for a specific and acceptable type of inlet protection along Old Fayetteville Road.

12. That the developer provide a final, written statement from the electrical utility stating that electric service can be provided to all locations shown on the construction plans prior to the approval of the construction plans.
13. That fire flow calculations and building-sprinkler design (as required) must be submitted and approved by the Town Engineer and Town Fire Department prior to construction plan approval.
14. That the applicant work with staff during construction to establish a 'natural' playfield. The field may contain a small number of trees but must remain clear enough to reasonably allow for play and sports activities.
15. That all proposed recreation facilities and areas shall be marked 'private' on the construction plans and final plat.
16. That the subdivision must comply with the requirements of LUO Section 15-177(d)(3)(a), which specifies a minimum number of nine (9) different significantly different house plans, i.e. elevation sets. The elevations must be incorporated into the plans before the construction plans may be approved.
17. That the applicant must obtain a CAPS certificate for the project from the Chapel Hill – Carrboro City Schools System prior to construction plan approval.
18. That the final version of the homeowner's association documents must be reviewed and approved by the Town Attorney. The documents shall not preclude the use of clotheslines on private lots within the subdivision.
19. That the applicant must obtain all necessary temporary and permanent easements prior to construction plans approval.
20. For non-LUO required infrastructure, including but not limited to the project's solar array, the applicant must either install the features or submit a performance security in accordance with the town's process for bonding, prior to the issuance of the project's 26th building permit.
21. That prior to the final plat approval, the applicant must display a site plan and erect disclosure signs on-site, adhering to the requirements of LUO Sections 15-83.1 and -83.2.
22. The playground equipment should be CPSC compliant with an ADA component.
23. The 25 remaining units will be size limited to 1,350 square feet.
24. Construct 1,100 square feet units so that no more than two units are located adjacent to each other.
25. Buyers should be free to select the financial institution of their choice.
26. Storage sheds should have room for at least two bicycles.
27. The central walking path should be six feet in width.
28. The developer will provide a stub-out or path to connect through the James' property.
29. The developer will disclose parking limitations to buyers.
30. The developer will provide a minimum of three months notice to existing residents before they must vacate.

This permit shall automatically expire within two years of the date of issuance if the use has not commenced or less than 10 percent (10%) of total cost of construction has been completed or there has been non-compliance with any other requirements of Section 15-62 of the Carrboro Land Use Ordinance.

All street construction on those streets proposed for acceptance by the Town of Carrboro shall be certified by an engineer. Engineering certification is the inspection by the developer's engineer of the street's subgrade, base material, asphalt paving, sidewalks and curb and gutter, when used. The developer's engineer shall be responsible for reviewing all compaction tests that are required for streets to be dedicated to the town. The developer's engineer shall certify that all work has been constructed to the town's construction specifications.

If this permit authorizes development on a tract of land in excess of one acre, nothing authorized by the permit may be done until the property owner properly executes and returns to the Town of Carrboro the attached acknowledgment of the issuance of this permit so that the town may have it recorded in the Orange County Registry.

NORTH CAROLINA

ORANGE COUNTY

IN WITNESS WHEREOF, the Town of Carrboro has caused this permit to be issued in its name, and the undersigned being all of the property above described, do hereby accept this Conditional Use Permit, together with all its conditions, as binding upon them and their successors in interest.

THE TOWN OF CARRBORO

ATTEST:

Town Clerk

BY _____
Town Manager

(SEAL)

I, _____, a Notary Public in and for said County and State, do hereby certify that Catherine C. Wilson, Town Clerk for the Town of Carrboro, personally came before me this day and being by me duly sworn says each for himself that she knows the corporate seal of the Town of Carrboro and that the seal affixed to the foregoing instrument is the corporate seal of the Town of Carrboro, that Steven E. Stewart, the Town Manager of said Town of Carrboro and Catherine C. Wilson, Town Clerk for the Town of Carrboro subscribed their names thereto; that the corporate seal of the Town of Carrboro was affixed thereto, all by virtue of a resolution of the Board of Aldermen, and that said instrument is the act and deed of the Town of Carrboro.

IN WITNESS THEREOF, I have hereunto set by hand and notarial seal this the ____ day of _____, 2011.

(SEAL)

Notary Public

My Commission Expires: _____



Legislation Text

File #: 14-0123, **Version:** 1

TITLE:

Discussion of a Downtown Parking Summit on Shared Parking

PURPOSE: The purpose of this item is to update the Board on the comments and outcomes of the Downtown Parking Summit meeting that was held on January 31, 2014.

DEPARTMENT: Economic & Community Development, Planning

CONTACT INFORMATION: Annette Stone (918-7319), Trish McGuire (918-7327)

INFORMATION: Last Fall, Town Staff was receiving reports of concerns from a few local businesses regarding violations of the two hour parking limits in the downtown area. These businesses requested that the Town enforce the two hour limit. In addition, the Town was taking “soft enforcement measures” to discourage park-n-walk users in Town lots due to the new pay for Park and Ride lots. These enforcement efforts fleshed out an underlying issue of a need for employee parking in the downtown.

In an effort to better manage the Town’s parking resources, the issue of how to deal with the needs of longer-term parking for business employees arises. Some businesses have requested parking permits from the Town to allow all-day parking for their employees in public lots. This raises several questions including 1) do the employees pay for the parking permit, 2) if not, and it is a free parking permit, this is in direct competition with paid lease lots around town and creates no incentive for employers/employees to pay for parking, 3) if it is paid, how to administer such a program. These are all general questions that arise when considering the Town’s position on providing parking for private businesses and it employees.

In an effort to open conversations and facilitate discussions, the Town Staff hosted a Parking Summit at the Century Center on January 31, 2014. There were three 1-1/2 hour sessions where property and business owners were invited to come and discuss parking needs and concerns. There was an effort made to match up those with parking needs with those with parking surplus.

Unfortunately, during the summit itself, there were very few connections that were made. Staff did capture all the comments and they are compiled in a list (Attachment E) and categorized into the following categories; Data, Pricing, Management, Management/Parking Plan, and Behavior/Perception. These comments will be useful moving forward with the Town’s parking plan scheduled to begin this fall.

As an interim step, while the Town works toward a comprehensive parking plan, town staff is requesting the Board to consider allowing staff to assess existing Town leased lots to determine to what extent they are used by employees or customers and consider leasing spaces to employers/employees during employee peak demand, which is Monday - Friday 7:30 a.m. - 5:30 p.m. This would leave the Towns parking lots open and available for nights and weekends free to the public.

A current inventory of public parking spaces is provided in Attachment B.

A preliminary survey of employee parking needs for downtown businesses has provided the following information. (Full survey results are available in Attachment C). Twenty-eight downtown businesses (including two Town of Carrboro departments) responded to the survey. Of those responding, 20 stated that they provided on-site parking for their employees. Of the 8 that did not provide on-site parking, 3 stated that they had shared parking agreements with another business. 7 of the 8 businesses that do not provide on-site parking for employees utilize public parking lots for their employees. The total number of employees reported to park off-site was 94, of which 64 reported to use public parking. A map of the businesses that responded to the survey is included as Attachment D.

FISCAL & STAFF IMPACT: There is no fiscal impact related to the discussion of this topic. Staff impact will vary based on what direction is given by the Board of Aldermen. The Town could realize a financial gain if some of the Town lots could be leased to private employees/employers. Implementation and management of a parking permit system will take considerable staff time that is currently not planned.

RECOMMENDATION: Staff recommends that the Board of Aldermen consider adopting the attached resolution.

A RESOLUTION ACCEPTING THE REPORT ON DOWNTON PARKING ISSUES AND
PROVIDING DIRECTION TO TOWN STAFF

Draft Resolution No. _____

WHEREAS, the Carrboro Board of Aldermen has received a staff report regarding various parking issues in Downtown Carrboro.

NOW THEREFORE, THE CARRBORO MAYOR AND BOARD OF ALDERMEN RESOLVES THAT TOWN STAFF IS DIRECTED AS FOLLOWS:

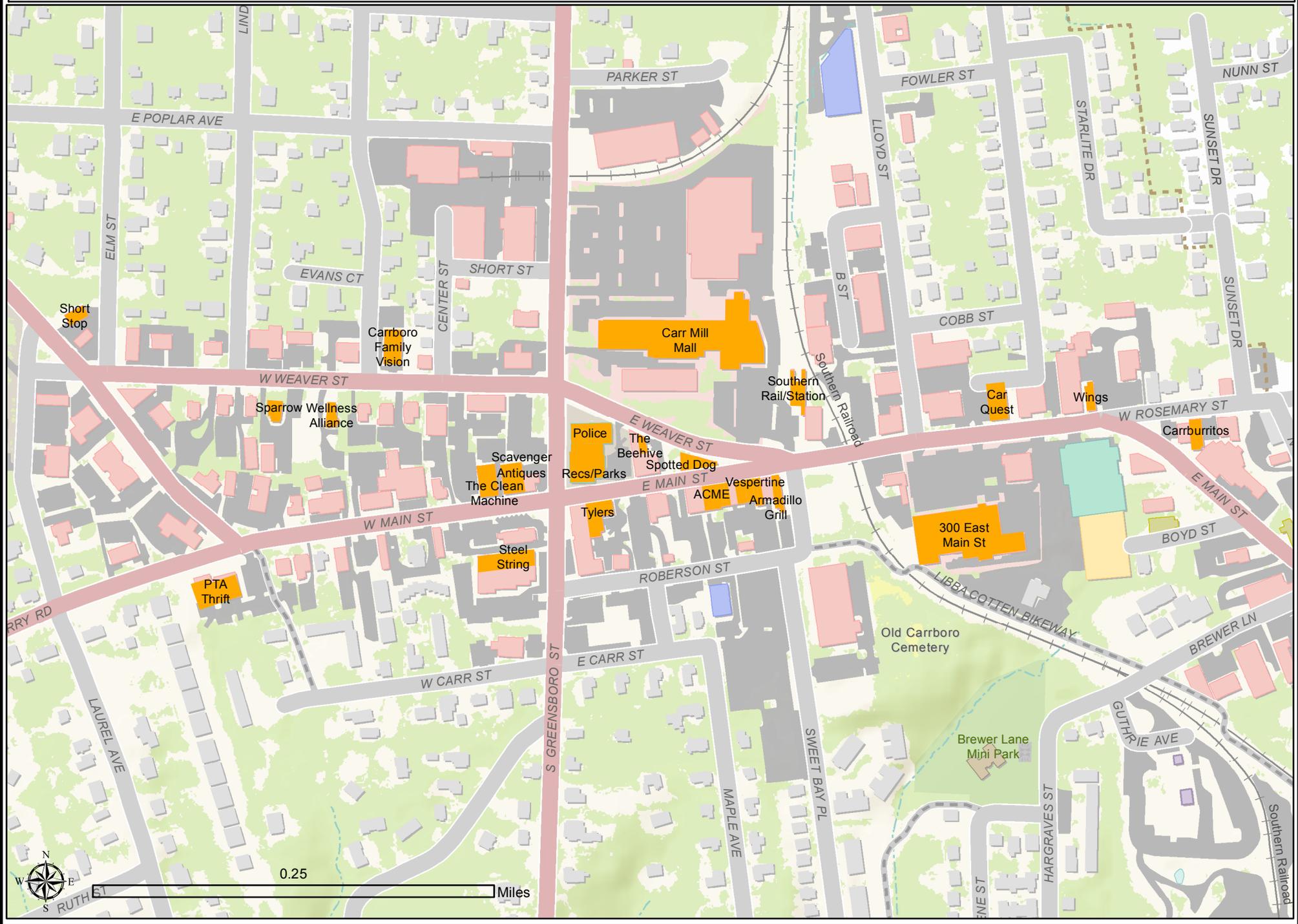
Downtown Parking Inventory (Updated November 2013)

ATTACHMENT B

<u>Parking Lot</u>	<u>Location</u>	<u>Undesignated Spaces</u>	<u>Accessible Spaces</u>	<u>Reserved Spaces</u>
Laurel	Laurel Ave. between Weaver and Jones Ferry	20	1	0
Weaver	300 Block of W. Weaver St.	32	4	0
Century Center	Intersection of W. Weaver and Greensboro	39	6	9
S. Greensboro	Intersection of S. Greensboro and Roberson	93	7	0
Roberson/Main*	Intersection of Roberson and E. Main	36	1	0
Rosemary	Corner of Rosemary and Sunset	22**	1	0
300 E. Main***	Parking Deck 300 E. Main	150-250 ****	0	0
100 Block E. Main	Behind Friendly Barber	31	0	6
Town Hall/Town Commons	301 W. Main St.	87	6	10
	TOTAL	510-610	26	25
	Without Roberson/Main lot	474-574	25	25

<i>* Lot temporarily closed as of 11/13</i>
<i>** 12 spots for Chapel Hill, 10 for Carrboro (inc 1 handicap)</i>
<i>***July 2013 - July 2018</i>
<i>****150 spots 7am-5:30pm; 250 spots 5:30pm-7am</i>

Downtown Carrboro, NC: Shared Parking Survey



Parking Summit - Categorized Notes

Comments were collected during each of the three summit sessions on January 31, 2014. Comments were transcribed and categorized into five topical areas. The areas are Data, Pricing, Management, Management/Parking Plan, and Behavior/Perception.

Data

1. # of employees downtown (700 FT/PT at Carr Mill only) – a survey is suggested as necessary to figure out need in relation to number of spaces
2. Engage with chapel Hill about lessons learned in their over 10 year evaluation/planning for downtown parking

In parking planning/survey mode

Experience with designing, operating, and charging for parking deck – costs, decisions, et cetera

Park and Ride; separate from other downtown parking issues

3. Perception is reality

Mall experience is different

Customer v. employee behavior is unpredictable (i.e. Not what you would expect).

4. Changes in businesses (type – shift away from doctors, lawyers and others with non-retail, walk-in trade) in Chapel Hill due to changes in parking.
5. Shared parking 'free riders' approach works up to a point. We are past that point.
6. People can't come downtown. There is not enough space.
7. Dynamic of each businesses
 - a. Timing/offsets
 - b. Safety/(late departures, park closest, carrying \$/deposits)
8. Prioritize data collection- # employees and # spaces available first month of study, would be good
9. Gym Property
10. Think of large properties
11. Single greatest impact. Park & Walk for employees
12. Town has 150 2 hour spaces in the deck during the day.
13. Rescue squad shares @ Carr Mill no charge, but may limit (to have) # of spaces
14. Cringe about fireplace shop, if renovated to restaurant
15. Roberson St. lot more in play
16. Vision- Rescue Squad to South Greensboro lot. Phase 1 surface parking?
 - a. Phase 2-deck there
17. Ask town to check its supply, neighborhoods weigh in too
18. UNC lots downtown- could help w/ employee parking (near Breadmens)

19. Lot on Roberson full much of the day (for this and previous item, will want to collect data on the #s of users, types of users and times they are using)
20. Lot behind Weaver Street Realty, double parking. Leasing 4 spaces from Tom Robinson.
21. Deck serves W. Franklin better than neighbors.
22. May need deck at South Greensboro, too, but also other options to explore.
23. Folks in Chapel Hill are seeking spaces in deck
24. How much parking @ 300 E Main? W/ deck addition @ build out 750
 - a. Some dedicated to hotel
25. Time Carrboro is leasing spaces in deck-? 5 years 150(D) 250(N)
26. How are parking arrangements structured, indemnification? Don't know , have to check.
27. Then what happens when 5 years of deck lease is up?
28. What do we know we have? For how long?
29. Problem-seems to be employees/daytime. Night seems to be okay.
30. How full @ Open Eye/S. Greensboro lot? Pretty full. But, people are staying beyond time limits.
31. What are limits @ Town Hall?
32. Another 50 employees @ Carr Mill with new office use upstairs.
33. Issue - getting more parking
34. What is story w/ parking deck?
 - a. Town leases 150 (d) 250 (n) free, but time limited.
 - b. Spaces available for lease otherwise
35. Expect use to increase as Boyd St open and people find it /get used to it.
36. Soft enforcement rather than hard due to costs implications of enforcement (not insignificant) began to limit due to changes in park park and ride lots (shift to pay-for parking).
37. Concerns that demand exceeds supply?
38. Concern about employee parking overflow to public lots
39. Competition w/ businesses that are leasing their excess spaces.
40. How many available for lease?
41. See sticky notes – Some available also some in parking deck
42. Summary of needs/offers
 - a. Needs
 - i. W. Weaver - 27 spaces (employee)
 - ii. W. Main - 1 space (employee)
 - iii. W. Main – 12 spaces (employee and clients)
 - iv. W. Weaver – 10 spaces (day)
 - v. W. Rosemary – 4-5 spaces (day/night)
 - b. Offers
 - i. W. Weaver – 12-15 (evenings, weekends)
 - ii. W. Weaver – 10 (nights, weekends)
 - iii. W. Main Street – 8-10 (evenings, weekends)
 - iv. E. Main Street – 3 (nights)

Pricing

1. Nice to have free spaces. Different from the Chapel Hill (the experience)
2. Need to get away from the notion that parking spaces are free. Parking spaces at Carr Mill cost approximately \$115,000 per year.
3. Maybe need to establish free customer parking
4. Parking is not free!
5. Problem to say it will continue to be free.
6. Could call it pre-paid (free through taxes) public spaces
7. Control supply, increase price, can change employee behavior (comment on experience of university in Chapel Hill)
8. Paid parking – pricing to deter students; allow validation for customers (e.g. American Tobacco – negotiated price, special events- business owners was fine to pay)
9. Nominal pay for parking – can be a deterrent to students.
10. Validation of customer parking - @ Brightleaf there were concerns that student seeks validation for all day when only small purchase/short time at the business
11. Boone example – nominal cost deters students
12. Can't allow restaurant in Fire place or addition @ vision
13. Employees have to get buy-in-maybe they have to pay?
14. Would have to charge competitively
15. There are costs, the question is who pays?
16. Community used to free parking, but there is not enough
17. Idea floated earlier that the town gets involved in leasing the top of the deck.
18. Carr Mill has no separate source of financing for parking – Costs covered by tenants
19. Need to see paid parking. In order to enforce, it needs to be paid for.
20. Maybe parking enforcement staff?
21. Will need to cover costs.
22. People pay for convenience – it is really a necessity
23. Either need buy-in from downtown businesses or have to charge for all spaces.
24. Not free if using something that belongs to everyone all day long – it is not free

Management

1. Excess spaces at the deck for the future development. Temporary solution is holding up progress. Business is hindered by parking.
2. Be better if could force employees to park in deck, but still a temporary solution.
3. Public use of private spaces – may be a separate issue.
4. If there's no business, no customers. Need to have someplace for employees, but they can move around.
5. How do we deal with longer-term?
6. Park at Rogers-Triem? Employees [Possible Solutions?]

- a. Five year plan for employees, phased with expected development
- 7. Pushing employee parking on others is not a great idea; Elmos' employees park in lot near Grist Mill instead of walking to employee lot on Roberson; Tyler's does not tow, but does keep an eye on behavior. Uses notes and talks to folks to let them know the spaces are for customers.
- 8. Ticketing/enforcement also needed if charging – to make it work
- 9. Doesn't tow, but likes the central location of s. Greensboro
- 10. Market the deck spaces . Need to.
- 11. Reminder of temporary nature of additional spaces in deck
- 12. Solution will be in hand in five (5) years
- 13. Expects a plan; wants action
- 14. Not a concern w/ customers parking and shopping elsewhere
- 15. Does keep an eye on employees and asks them not to
- 16. Private lots allowing public use when the business is not open (e.g. Chapel Hill Tire)
- 17. Today, looking for short term solutions.
- 18. Lease, such as @ the deck
- 19. Transfer enforcement authority- Town tickets on Carr Mill instead of towing
- 20. Could use payment (pay stations gates)
- 21. Carrboro properties- do not want to put large private lots in play for public use, unless as part of comprehensive solution.
- 22. Still sounds like need sfor more employee parking Where? Does town have ideas, proposals.
- 23. Employees (Town) park elsewhere and shuttle in. Make Town lots at Century Center and Town Hall available otherwise.
- 24. Renegotiate to allow employee parking in the deck- currently, contract doesn't function for that need – time is limited to allow turnover of spaces for businesses at 300 E. Main.
- 25. All parking doesn't need to be downtown
- 26. Currently co-locating Rescue Squad @ Firestations
- 27. What would, if comprehensive solutions, would Carr Mill be able to put in play?
- 28. Can't happen until big expensive study. Carr Mill has to be part of it and make sure it works for its businesses. Piecemeal approach needs to stop; can't allow it to continue.
- 29. When solutions, locations identified, will be talking about details. When effort is serious, will get involved.
- 30. Ready to be involved-at least a year?
- 31. Would like to not pay \$80,000 for parking lot security. There because doesn't see community doing something else.
- 32. Town Hall lot, empty @ night? Shuttle from there to downtown.
- 33. Needs to understand use of town lots, opportunities for sharing
- 34. Figure out lots on Roberson for parking deck. (expecting/knowning 300 E. deck not permanent) longer tem plan.
- 35. Chapel Hill discussing circulator to get folks to park & ride. Late night businesses, \$, Safety
- 36. Today- part of 'manage it better' strategy; other steps will be taken to understand shorter and longer term problems.
- 37. As a new manager, immediate concern about availability of public parking.

38. 2nd wind having to police its lot
39. 2 hour time limit too short
40. Employees park @ Jones Ferry Park & Ride. Shuttle bus employees to downtown
41. Increase time limits to 3 hours
42. Bought lot, showed need for parking
43. Ongoing obligation to obtain parking (where flexibility allowed to have little or none) in the LUO.
44. Those businesses should be contacted, encouraged to obtain spaces in the deck, since it is available now.
45. This would help some in the short term
46. E.G. Milltown- no parking required due to flexible administration. Town should tell them to go to deck.
47. Follow-up has not happened, ongoing obligation to provide rests with permit holder.
48. Town lease top of the deck-charge for hang tags?
49. Prefer town controls deck, issues hang tags.
50. Is there a liability issue if something happens in a lot of one business that is allowing another to use off hours and there is an accident?
51. Customers, employees using deck should be for/from Carrboro not UNC/CH.
52. What would be the costs if Carrboro leases deck. Subleasing to businesses?
53. Administrative costs, but expect would be less than enforcing surface lots.
54. Shuttle from Jones Ferry? Lease lots at Jones Ferry, make changes to # of stops, timing.
 - a. Adjust bus schedule to support.
55. If had to use other public lots, would shift from Weaver to Town Hall.
56. Wee hours parking issue.
57. Hangtags- What would be the problems?
 - a. Admin/cost – need to monitor
58. Town gets involved in top of deck for employees.
59. Seems Town has to take the head interests of the Town. New paradigm of being downtown, having to pay for it, to make it work.
60. Thought of a park and ride? Like one suggested earlier, a variation (CHT P & R) noted
61. Mini bus from P&R lot also suggested, but to be explored.
62. If there is a parking agreement between private parties, Town needs to see it (if part of meeting ordinance requirement) otherwise, look at example of parking agreements in Chapel Hill for off-hours public parking.
63. New idea for Town to be providing employee parking , yes but frees up pressure on customer parking, have to create parking to achieve successful downtown for work, live, play.

Management/Parking Plan

1. Timing of plan; cost share w/ DCHC MPO
2. Should expand to include- Chapel Hill, partner w/ Downtown, seek some \$ for ½ cent sales tax.
3. Involve Chapel Hill to look at entertainment district – at least one more walking circle.

Behavior/Perception

1. What if people use deck but due to perception won't walk west to center?
2. Deck/boyd street not fully used at present.
3. Deck will take a while for people to get used to it, based on experience with decks in Chapel Hill.
4. Approach has always been short-sighted; can't continue. Way of thinking has to change.
5. Things will get worse.
6. Chamber gets calls about towing.
7. Will need to train folks to use any new lots after we identify them, clean them up.
8. Meeting & getting folks to meet regularly-build buy-in
9. Other things-deal w/ 2 am safety - So in twos, police station, understand concerns about safety
10. Bigger concern- where will customers park. Employees can walk 2 ½ minute walk from deck.
11. If employees have to walk from deck, won't quit
12. Concern about leased spaces going away- devastating to some (Weaver example)
13. Safety concerns- loading/unloading; carrying cash.
14. Dealing with perceptions, resistance to paying, walking to spaces off site.
15. A shift in thinking, need to deal with it.
16. How get business owners to do this (require employees to park off-site)?
17. Right now no incentive for employers to be engaged until problem which results in need to actively pursue a solution, won't get sense of urgency.
18. What's going to happen – get the people on board. Everyone participates, will pay.



Town of Carrboro

Town Hall
301 W. Main St.
Carrboro, NC 27510

Legislation Text

File #: 14-0122, **Version:** 1

TITLE:

Update on East Weaver Street Bike Corral Trial Installation

PURPOSE: The Board of Aldermen is asked to receive a report and consider options for the bike corral that has been installed on a trial basis since August on E. Weaver St.

DEPARTMENT: Planning

CONTACT INFORMATION: Jeff Brubaker - 918-7329

INFORMATION: More information is included in the memo in Attachment B and associated graphics in Attachment C.

FISCAL & STAFF IMPACT: The fiscal and staff impacts depend on the option chosen by the Board of Aldermen.

RECOMMENDATION: That the Board of Aldermen adopt the resolution in Attachment A receiving the report with the consideration of an option for proceeding.

**A RESOLUTION RELATING TO THE BIKE CORRAL TRIAL INSTALLATION ON EAST
WEAVER STREET**

WHEREAS, on June 18, 2013, the Board of Aldermen adopted a resolution accepting the offer of a donation of a bike rack from the Carrboro Bicycle Coalition and Performance Bike to be installed in a bike corral on East Weaver Street; and,

WHEREAS, the resolution authorized a trial period for the bike corral and directed staff to report back to the Board based on information collected in the trial period for further direction on the possibility of a permanent installation; and,

WHEREAS, the resolution directed staff to work with businesses before and during the trial period; and,

WHEREAS, the bike corral was installed on August 22, 2013; and,

WHEREAS, Town staff communicated with businesses along the street before, during, and after the installation;

NOW, THEREFORE BE IT RESOLVED by the Carrboro Board of Aldermen that the Board:

1. Receives the staff report.
2. Provides the following direction on the bike corral trial installation:
 - a. _____
 - b. _____
 - c. _____

This is the 15th day of April in the year 2014.



TOWN OF CARRBORO

NORTH CAROLINA

MEMORANDUM

DELIVERED VIA: HAND MAIL FAX EMAIL

DATE: April 11, 2014

TO: David Andrews, Town Manager
Mayor and Board of Aldermen

CC: Christina Moon, Planning Administrator
Patricia McGuire, Planning Director

FROM: Jeff Brubaker, Transportation Planner JSB

RE: Bike Corral Trial Installation Update

On June 18, 2013, the Board of Aldermen adopted a resolution accepting the offer of a donation of a bike rack from the Carrboro Bicycle Coalition and Performance Bike to be installed in a bike corral on E. Weaver St. The resolution authorized a trial period for the bike corral, directing staff to report back to the Board based on information collected during the trial period for further direction on the possibility of a permanent installation. The resolution also directed staff to communicate with businesses before and during the trial period.



The bike corral was installed on August 22, 2013, by the Public Works Dept., with the assistance of the Planning Dept. and staff from Performance Bike. The corral was installed in place of an automobile parking space near the mid-block of E. Weaver St.

To study the impact of the bike corral, Town staff and volunteers collected data before and after installation on parking and loading zone utilization on E. Weaver St. Specifically, detailed turnover studies were collected on June 5-6 and October 2-3, 2013 (both Wednesday-Thursdays). The June data were presented to the Board at the June 18 meeting. Town staff have also been in communication with business owners along the street.

Notes on methodology

Data for October 2-3 were collected in a similar manner as data for June 5-6.¹ The data collection period each day was for 12 hours, from 7:00 am to 7:00 pm. Volunteers logged the times of movements into and out of parking spaces and loading zones and the destination visited by passengers or the location served by delivery drivers. Unlike for the auto spaces, bike corral data include the number of bicycles parked at any one time but not the duration of individual bicycles. According to the Town Code, the five auto spaces have a one-hour maximum parking duration, and the two loading zones are reserved for loading and unloading only between 7:00 am and 5:30 pm. The auto parking spaces were labeled between Space 1 (nearest to the Main-Weaver-Roberson intersection) and Space 5 (farthest from the intersection). Space 6 in the June collection period became the bike corral for the October period. The loading zone behind Jade Palace is the east loading zone, while the loading zone in front of Market Street Coffee is the west loading zone.

Summary of parking data – October 2013

Parking duration (applies to all 24 hours – two 12-hour periods – unless otherwise noted)

- Total vehicle minutes in the five auto parking spaces averaged 1099 over the 24 hours surveyed (two 12-hour periods each day), with a range of 931 to 1180.
- Total passenger vehicle minutes in the two loading zones were 311 in the east loading zone and 209 in the west loading zone. This included both passenger vehicles parked during the restricted time and passenger vehicles parked during the permitted time.
- Total vehicle minutes in the bike corral were 1483.
- The five auto spaces had an average parking duration of 57 minutes, ranging from 24 minutes (Space 1) to 105 minutes (Space 2).²
- Loading zone east had an average delivery vehicle parking duration of 16 minutes. Loading zone west's average was 7 minutes. Both durations are less than the 30 min. maximum time allowed by the Town Code. Only one delivery vehicle in the 24-hour period exceeded the 30 min. maximum.
- 24 percent of all vehicles in the five auto spaces exceeded the one-hour time limit, ranging from 7% in Space 1 to 44% in Space 2. Only two vehicles parked in Space 2 on Thurs., Oct. 3, within the 7:00 am to 5:30 pm period, one for 100 minutes and one for 459 minutes (approx. 7.5 hours).

Percentage of time occupied

- The five auto parking spaces were occupied an average of 76% of the time, with a range between 65% and 82%.

¹ One difference between the two data collection periods is that UNC was in its summer session during the June 5-6 period.

² Does not include vehicles still parked at the end of each day's data collection period, as assuming a 7:00pm parking completion time would have been inaccurate.

- The loading zones were occupied an average of 21% of the time. They were occupied with delivery vehicles 6% of the time.
- The bike corral was occupied with at least one bike an average of 53% of the time.
- All parking and loading zones were occupied an average of 60% of the time.

Vehicle turnover

- A total of 167 vehicles parked in the parking spaces and loading zones.
 - The five auto spaces had a total of 98 vehicles.
 - The bike corral had a total of 27 vehicles.
 - The loading zones had a total of 15 delivery vehicles and 27 passenger vehicles.
 - 18 of the 27 passenger vehicles parked in the loading zone parked there before 5:30 pm, in violation of the Town Code
 - No delivery vehicles parked in the loading zones after 4:00 pm.
- The five auto spaces had an average turnover of 0.8 vehicles per hour, ranging from 0.5 to 1.5.
- The bike corral had an average turnover of 1.1 vehicles per hour.
- The largest number of bicycles parked in the corral at any one time was 6, at 2:48 PM on October 3.
- The longest duration the bike corral had no bicycles parked at it was 298 minutes, on Oct. 3 from 7:00 am to 11:58 am

Destinations

- The percentage of people who parked on E. Weaver St. and visited various destinations was as follows:
 - Weaver Street Market: 59%
 - Unknown: 11%
 - Spotted Dog: 10%
 - Multiple: 5%
 - Other: 5%
 - Market Street Coffee: 4%
 - Carr Mill Mall: 3%
 - Beehive: 2%
- The percentage of delivery drivers who parked on E. Weaver St. and delivered to various destinations was as follows:
 - Spotted Dog: 33%
 - Market Street Coffee: 20%
 - Jade Palace: 13%
 - Beehive, Carr Mill Mall, Century Center, Multiple, and Unknown: 7% (1 vehicle each)

Comparison of October 2013 with June 2013 data

The following table offers a comparison of data from each survey period (before and after bike corral installation), each representing 24 hours of data collection.

ATTACHMENT B-4

Statistic	June 5-6, 2013	October 2-3, 2013
Total vehicles parked	174	167
Total passenger vehicles parked	164	152
Total passenger vehicles parked in auto spaces	134 <small>(Spaces 1-6)</small>	125 <small>(Spaces 1-5 + corral)</small>
Average duration of passenger vehicles parked in auto spaces (minutes)	48 <small>(Spaces 1-6)</small>	57 <small>(Spaces 1-5)</small>
Percent violation of 1-hr. limit in auto spaces	21%	24%
Percent of time occupied by a vehicle – loading zones	19%	21%
Percent of time occupied by a delivery vehicle – loading zones	4%	6%
Number of delivery vehicles parked in loading zone	10	15
Number of passenger vehicles parked in loading zone	30	27
Number of passenger vehicles parked in loading zone before 5:30 pm	19	18
Average turnover (veh./hr.) – auto spaces	0.9 <small>(Spaces 1-6)</small>	0.8 <small>(Spaces 1-5)</small>
Average turnover (veh./hr.) – Space 6 compared to bike corral	1.3 <small>(Space 6)</small>	1.1 <small>(Bike corral)</small>

Destination – number of parkers (percentage of total) – autos – auto spaces and loading zones

Destination	June 5-6, 2013	October 2-3, 2013
Weaver Street Market	104 (63%)	72 (59%)
Spotted Dog	12 (7%)	12 (10%)
Beehive	7 (4%)	3 (2%)
Market Street Coffee	4 (2%)	5 (4%)
Carr Mill Mall	2 (1%)	4 (3%)
Century Center	2 (1%)	1 (1%)
Multiple	4 (2%)	6 (5%)
Other	11 (7%)	6 (5%)
Unknown	18 (11%)	13 (11%)
Total	164 (100%)	122 (100%)

Destination – number of parkers (percentage of total) – Space 6 (June): autos; Bike corral (October): bicycles

Destination	June 5-6, 2013 Space 6 autos	October 2-3, 2013 Corral – bicycles
Weaver Street Market	21 (66%)	17 (58%)
Spotted Dog	1 (3%)	0 (0%)
Beehive	3 (9%)	2 (7%)
Market Street Coffee	1 (3%)	1 (4%)
Century Center	1 (3%)	0

Multiple	1 (3%)	0
Other	1 (3%)	0
Unknown	3 (9%)	7 (26%)
Total	32 (100%)	27 (100%)

Feedback from businesses

Businesses were contacted at the time of the installation and after it. The owners or managers of Spotted Dog, Beehive, and Market Street Coffee expressed concern for the impact of the corral on the availability of automobile parking for their businesses. A Weaver Street Market contact expressed support for the corral. A summary of the feedback is provided below. Comments spanned the full spectrum of support and concern.

- The corral is a horrible, terrible idea.
- The corral should be larger.
- Passenger vehicles are parking in the loading zone. This should be enforced.
- Concerned about large tractor trailer delivery trucks clipping cars.
- Bikes parked at the corral will get crushed by trucks.
- Someone will get hurt.
- Concerned about people not crossing at the crosswalk.
- Concerned about parking spaces being used by tractor trailers.
- Worried about delivery trucks blocking drop-off locations for elderly clients in paratransit vehicles.
- I have seen at most one bike on the rack at any given time. It makes more sense to have a parking space used over an unused bike corral.
- A delivery vehicle could not park in the loading zone due to not being able to pull forward into the bike corral space so as to not block eastbound vehicles moving between it and the in-street yield to pedestrian sign. The delivery vehicle used the police department parking lot. The east loading zone was reportedly being used at the time.

Planning Department staff have received positive comments about the corral from users of the corral, and also a comment from a delivery driver urging that the loading zones be retained.

Options for the Board of Aldermen to consider

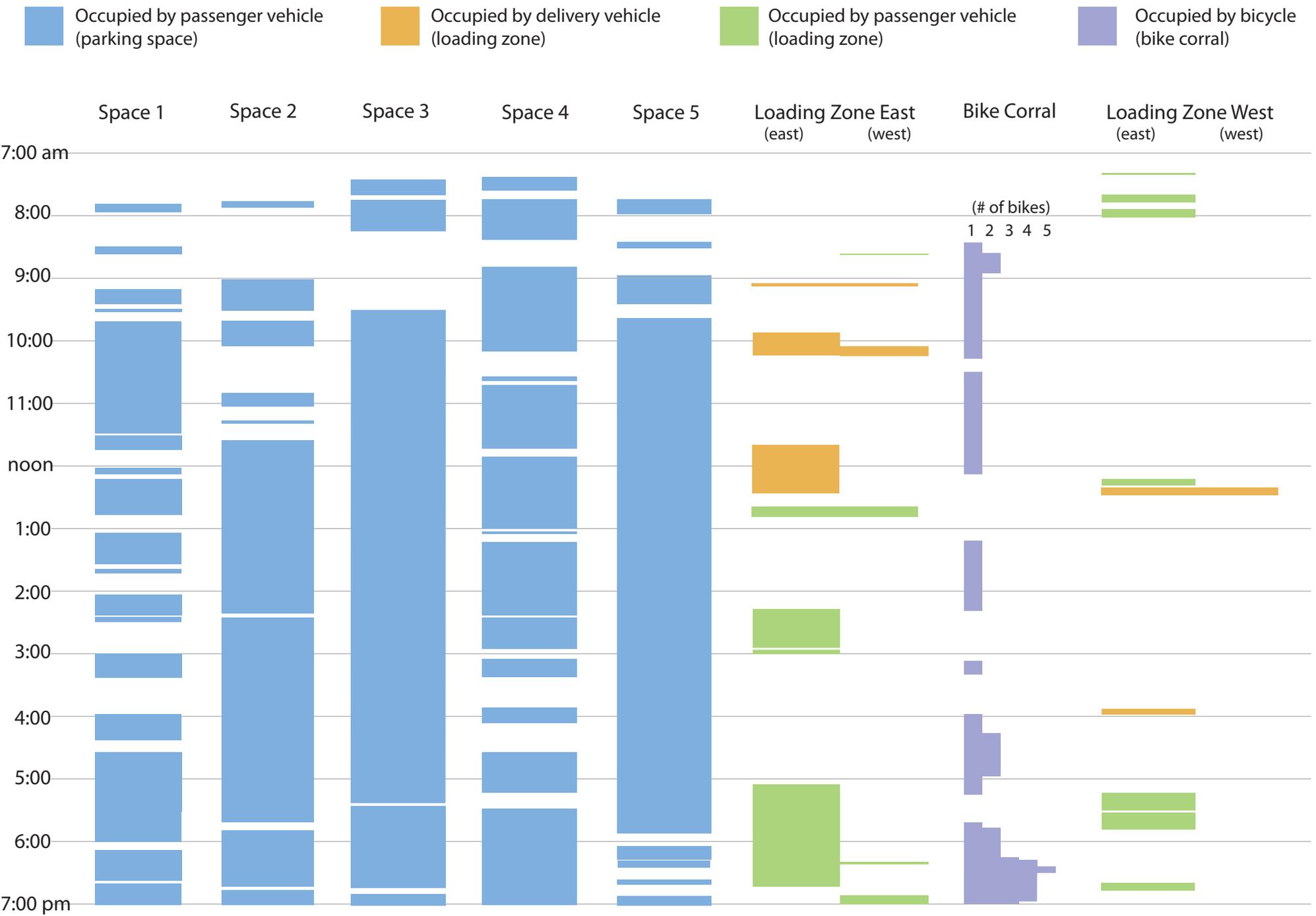
Based on the above information, the Board of Aldermen may wish to pursue one or more of the following options for proceeding with the bike corral.

- Direct staff to collect more data on parking utilization on E. Weaver St., including use of the corral.
- Direct staff to move the corral to another location on E. Weaver St.
- Direct staff to remove the corral and return it to the Carrboro Bicycle Coalition, or coordinate to see if it could be moved to another location.
- Direct staff to make the current location permanent.

ATTACHMENT B-6

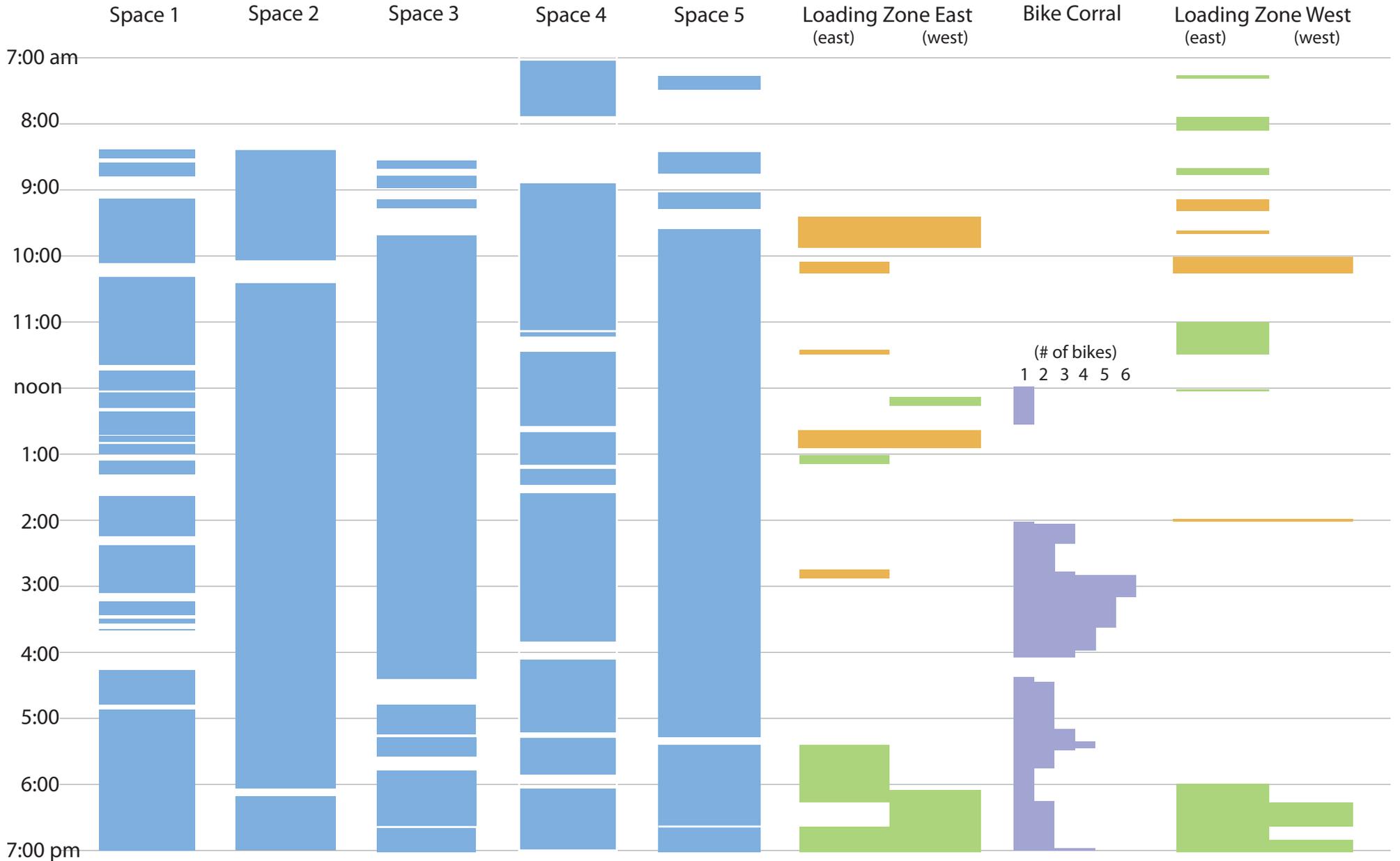
- Modify the loading zone parking restrictions to allow for additional auto parking, e.g. changing the evening time limit to 4:00 pm instead of 5:30 pm.

E. Weaver Street Parking and Loading Spaces: Use on October 2, 2013



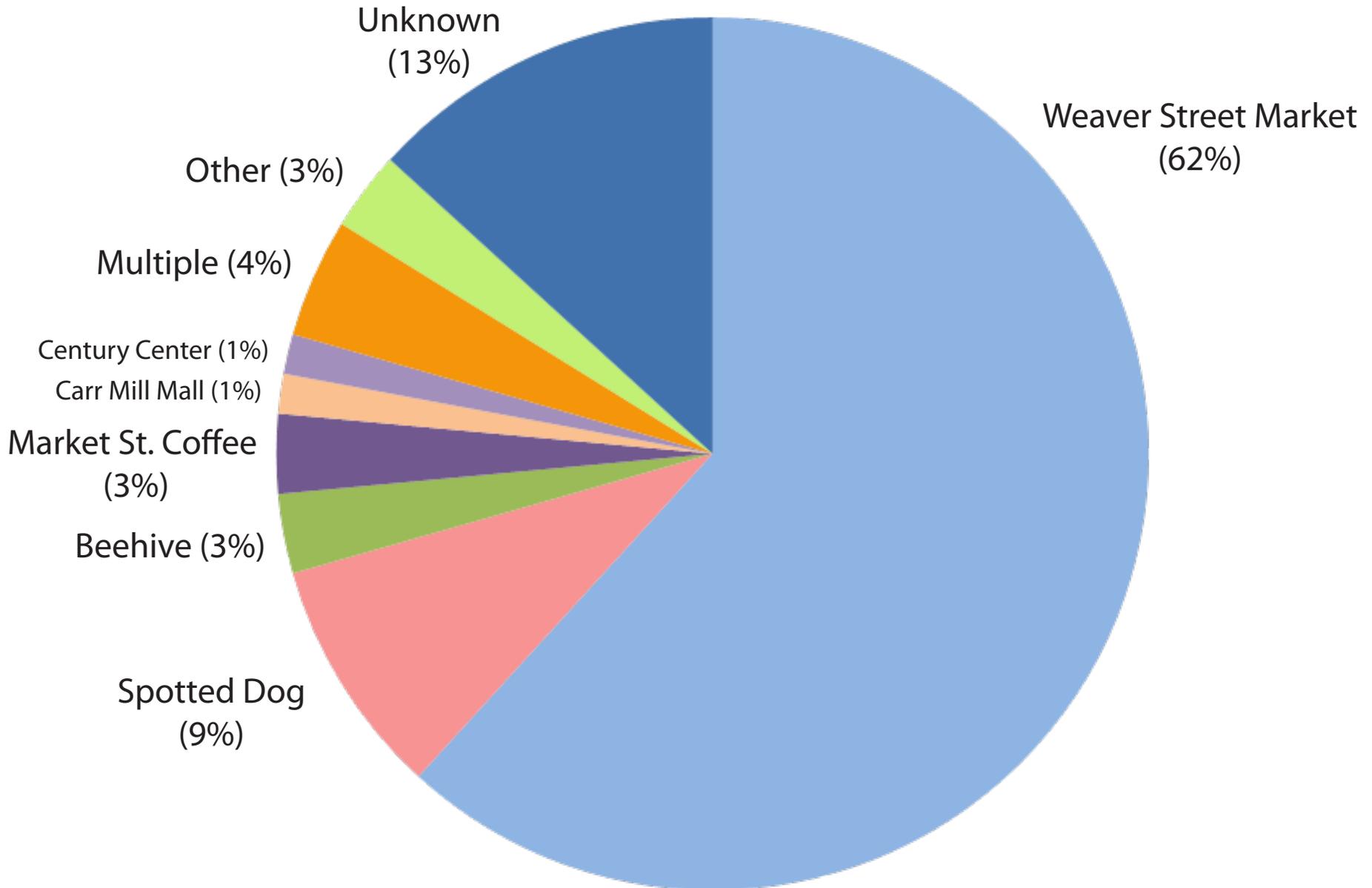
E. Weaver Street Parking and Loading Spaces: Use on October 3, 2013

■ Occupied by passenger vehicle (parking space)
 ■ Occupied by delivery vehicle (loading zone)
 ■ Occupied by passenger vehicle (loading zone)
 ■ Occupied by bicycle (bike corral)



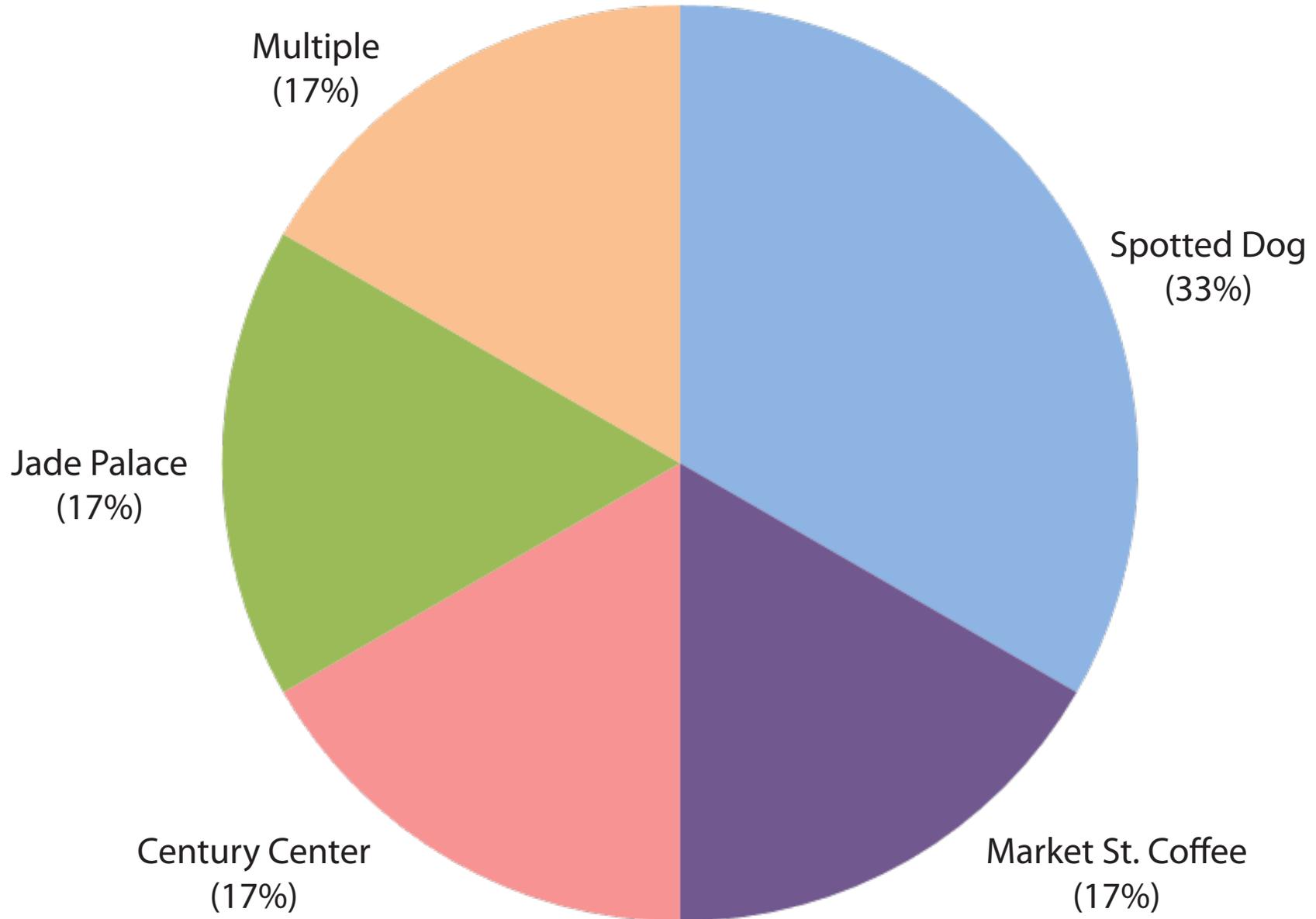
E. Weaver Street Parking and Loading Spaces: Drivers' Destinations Passenger Vehicles, October 2, 2013

Attachment
C



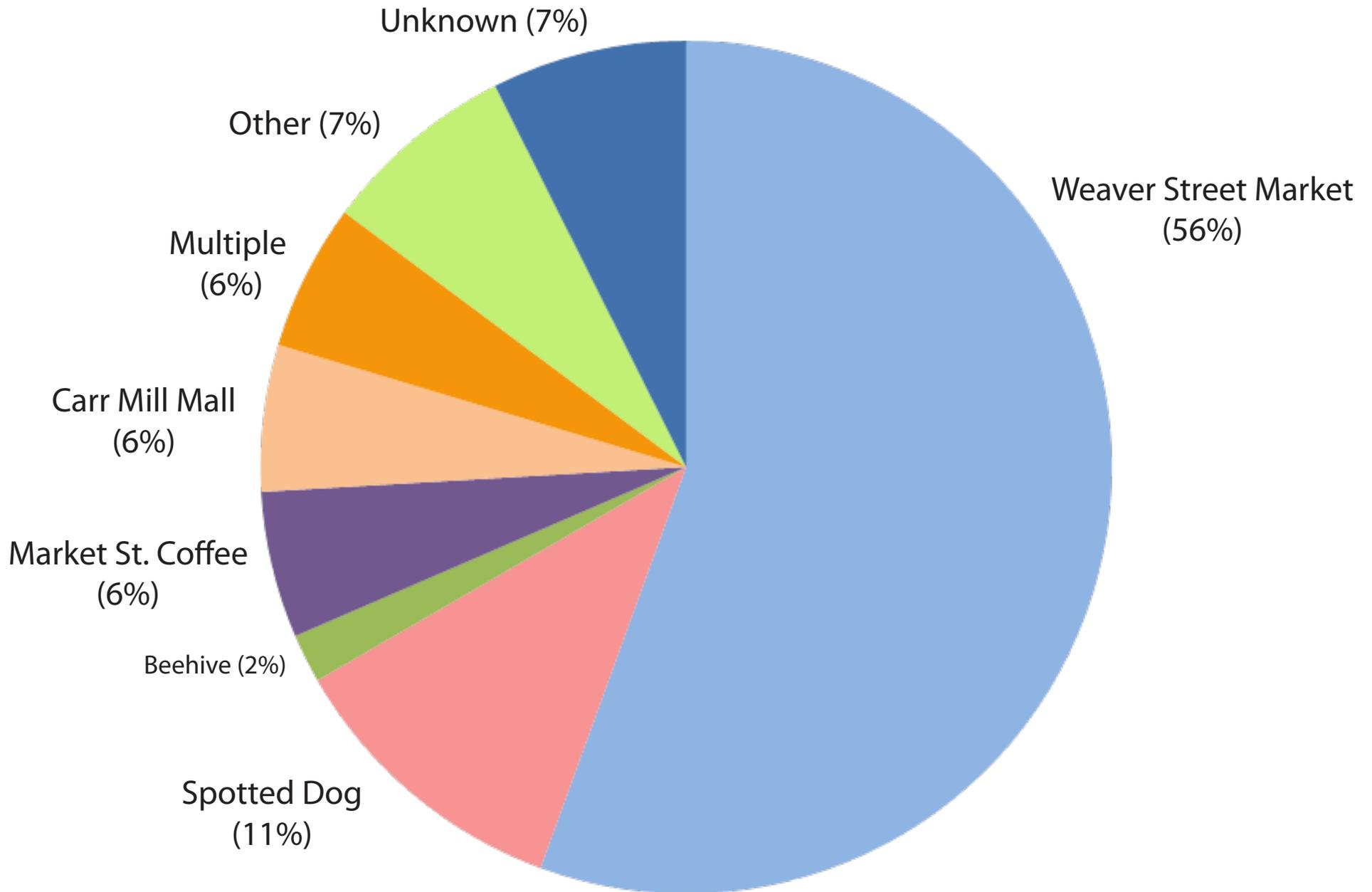
E. Weaver Street Parking and Loading Spaces: Drivers' Destinations Delivery Vehicles, October 2, 2013

Attachment
C



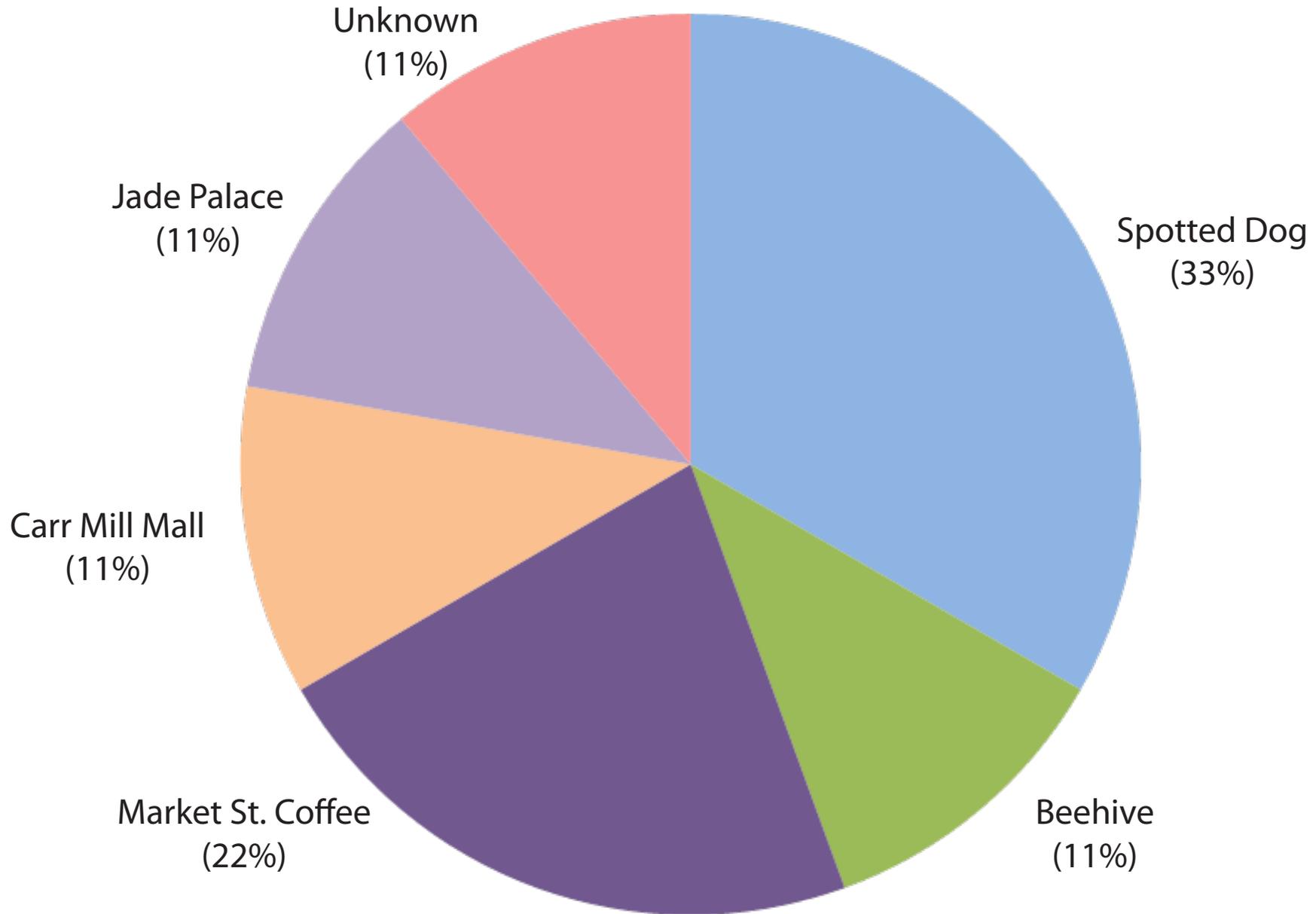
E. Weaver Street Parking and Loading Spaces: Drivers' Destinations Passenger Vehicles, October 3, 2013

Attachment
C



E. Weaver Street Parking and Loading Spaces: Drivers' Destinations Delivery Vehicles, October 3, 2013

Attachment
C





Legislation Text

File #: 14-0126, **Version:** 1

TITLE:

Review of the 2014 Annual Report on the Schools Adequate Public Facilities Ordinance (SAPFO) from the Technical Advisory Committee

PURPOSE: The Orange County Board of County Commissioners has referred the 2014 report for review and comments. The Board of Commissioners is scheduled to certify the report in May and has requested comments from signatories to the Memorandum of Understanding by April 21, 2014. A resolution that provides an opportunity for the Board of Aldermen to specify comments has been prepared.

DEPARTMENT: Planning

CONTACT INFORMATION: Patricia McGuire - 919-918-7327; pmcguire@townofcarrboro.org

INFORMATION: The transmittal letter and executive summary of the 2014 Draft Annual Report on the Schools Adequate Public Facilities Ordinance (SAPFO) Technical Advisory Committee are included as attachments. The full report may found at the County's Planning Department website through the following link: <http://www.co.orange.nc.us/planning/SpecialProjects.asp>. Annual reporting requirements of the SAPFO are spelled out in Section 1D of the Memorandum of Understanding (MOU). The SAPFOTAC, which includes Planning Directors and representatives of the County's two school systems, prepares the report each year. The report addresses five areas for each of the two school systems, Level of Service, Building Capacity and Membership, Membership Date, Capital Improvement Planning, Student Membership Projection methodology, and Student Membership Projections. An executive summary provides an overview of the expected performance within each area. Excerpts from the report related to the Chapel Hill Carrboro City Schools are included below.

Chapel Hill Carrboro City Schools (CHCCS) Summary Information

The CHCCS school district does not exceed the adopted levels of service established in the SAPFO. Projections do show potential needs at the elementary, middle, and high school levels within the 10-year planning period.

Enrollment. Within the district, the total number of students increased by 52 as a result of 11 additional elementary students, 73 additional middle school students and 32 fewer high school students.

Level of Service for the three school levels is summarized below:

Elementary

- A. Does not exceed 105% LOS standard (current LOS is 95.3%).
- B. Capacity has increased by 585 students due to the opening of Northside Elementary School. Projections show that Chapel Hill/Carrboro *Elementary School #12 will be needed in 2020-21*. This is one year earlier than last year's projections.
- C. The projected growth rate at this level is expected to decrease over the next 10 years but

remain positive (average ~1.4% per year compared to 2.0% over the past 10 years).

Middle School

A. Does not currently exceed 107% LOS standard (current LOS is 100.6%).

B. The projected growth rate at this level is expected to increase at a greater rate over the next 10 years than it has in the previous 10 years (average ~1.6% compared to an average of 0.67% over the past 10 years).

C. The planned addition to Culbreth Middle School for the 2014-15 school year is proposed to increase capacity with the addition of 104 seats. As a result, projections show that Chapel Hill/Carrboro *Middle School #5 is projected to be needed in 2020-21*. This is three years later than last year's projections

High School

A. Does not currently exceed the 110% LOS standard (current LOS is 97.1%).

B. The projected growth rate at this level is expected to decrease, but remain positive over the next 10 years (average ~1.3% compared to 1.86% over the past 10 years).

C. *Expansion of Carrboro High School from the initial capacity of 800 students to the ultimate capacity of 1,200 students is projected to be needed in 2023-24*. This is three years later than last year's projections which showed a need in 2020-21.

Student Projection Analysis. Membership is projected to increase for all levels in the school system (see pages 37-38 of the report).

Other Considerations.

Since student Generation Rates were updated in 2010, both school systems have reported that the actual number of students from new developments has exceeded the projections. It is not yet known whether this is a short- or longer term trend. The SAPFOTAC has discussed these increases and recommended further evaluation, including consideration of the rates for different types of housing. Orange County has determined that it will work with Tischler-Bise to study membership rates from new housing.

The Adequate Public School Facilities provisions, LUO subsections 15-88 through 15-88.7, and the associated memorandum of understanding is provided as information. A summary chart showing the status of CAPS for approved residential developments has been prepared and is also provided as information.

FISCAL & STAFF IMPACT: None noted with the review of this report.

RECOMMENDATION: Staff recommends that the Board of Aldermen review the draft report and specify comments in the attached resolution for transmittal to Orange County.

A RESOLUTION ACCEPTING AND COMMENTING ON THE SCHOOLS ADEQUATE PUBLIC FACILITIES
TECHNICAL ADVISORY COMMITTEE (SAPFOTAC) 2014 REPORT

WHEREAS, the Town has had a longstanding interest in the success and excellence of the Chapel Hill-Carrboro City Schools; and

WHEREAS, the Town has participated in the development and implementation of the schools adequate public facilities ordinance provisions since 2003; and

WHEREAS, the annual technical advisory committee report has been prepared and distributed for comments.

NOW, THEREFORE, BE IT RESOLVED that the Board of Aldermen of the Town of Carrboro provides the following comments:

This the 15th day of April in the year 2014.

BARRY JACOBS., CHAIR
EARL MCKEE, VICE CHAIR
MARK DOROSIN
ALICE M. GORDON
BERNADETTE PELISSIER
RENEE PRICE
PENNY RICH

ORANGE COUNTY BOARD OF COMMISSIONERS
Post Office Box 8181
200 SOUTH CAMERON STREET
HILLSBOROUGH, NORTH CAROLINA 27278



March 19, 2014

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

Donna Coffey, Chair
Orange County Board of Education
200 E. King Street
Hillsborough, NC 27278

Lydia Lavelle, 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 2014 Annual SAPFOTAC Report. In accordance with the SAPFO Memoranda of Understanding (MOU), the Board of County Commissioners (BOCC) approved the November 15, 2013 actual membership and capacity numbers for Orange County Schools and Chapel Hill – Carrboro City Schools at its meeting on December 2, 2013.

The SAPFOTAC, comprised of representatives of both school systems and the Planning Directors of the County and Towns has produced the 2014 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 2014 Executive Summary and the March 18, 2014 BOCC meeting agenda item abstract when the BOCC received the draft report.

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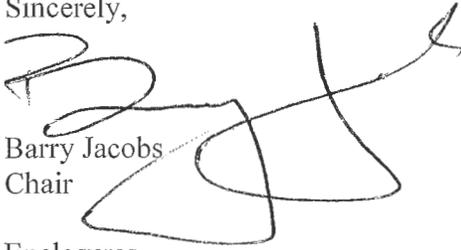
The full draft SAPFOTAC report is available on the Orange County Planning Department website in the Current Interest Projects section

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

The 2014 Annual SAPFOTAC Report is scheduled to be certified by the BOCC at a regular meeting in May 2014. 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 **April 21, 2014**. Mr. Benedict can be reached by phone at (919) 245-2592, by e-mail at cbenedict@orangecountync.gov, or by fax at (919) 644-3002. Any comments received will be part of our agenda package in May.

Please share this information and the 2014 SAPFOTAC report with your respective boards.

Sincerely,



Barry Jacobs
Chair

Enclosures

cc: Board of County Commissioners

Michael Talbert, Interim Orange County Manager

Roger L. Stancil, Manager, Town of Chapel Hill

David Andrews, Manager, Town of Carrboro

Eric Peterson, Manager, Town of Hillsborough

Tom Forcella, Superintendent, Chapel Hill-Carrboro City Schools

Gerri Martin, Superintendent, Orange County Schools

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

Catherine Mau, 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 Director, Town of Carrboro ✓

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2014 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>	5829	5554	11	3694	3433	30
<i>Middle</i>	2840	2858	73	2166	1747	63
<i>High</i>	3875	3764	(32)	2439	2421	106

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

II. Annual Update to SAPFO System

A. Capital Investment Plan (CIP).....(No 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 2013-14 School Year – Chapel Hill Carrboro City Schools

(The second column for each year includes the number of students the projection was off compared to actual membership. An “L” indicates the projection was low compared to the actual, whereas an “H” indicates the projection was high compared to the actual.)

	Actual 2013 Membership	Year Projection Made for 2013-14 Membership									
		2008-2009		2009-2010		2010-2011		2011-2012		2012-2013	
Elementary	5554	5703	H149	5604	H50	5489	L65	5572	H18	5612	H58
Middle	2858	2960	H102	2848	L10	2795	L63	2796	L62	2862	H4
High	3764	3930	H166	3792	H28	3733	L31	3783	H19	3828	H64

Analysis of 5 Years of Projections for 2013-14 School Year – Orange County Schools

(The second column for each year includes the number of students the projection was off compared to actual membership. An “L” indicates the projection was low compared to the actual, whereas an “H” indicates the projection was high compared to the actual.)

	Actual 2013 Membership	Year Projection Made for 2013-14 Membership									
		2008-2009		2009-2010		2010-2011		2011-2012		2012-2013	
Elementary	3433	3337	L96	3355	L78	3435	H2	3438	H5	3433	-
Middle	1747	1708	L39	1751	H4	1732	L15	1716	L31	1733	L14
High	2421	2254	L167	2298	L123	2258	L163	2278	L143	2355	L66

D. Student Growth Rate(Change).....Pg. 39

Year Projection Made:	Projected Average Annual Growth Rate over Next 10 Years									
	Chapel Hill/Carrboro School District					Orange County School District				
	2009-10	2010-11	2011-12	2012-13	2013-14	2009-10	2010-11	2011-12	2012-13	2013-14
<i>Elementary</i>	1.72%	1.44%	1.59%	1.18%	1.44%	1.34%	1.57%	1.6%	1.31%	1.30%
<i>Middle</i>	1.93%	1.67%	1.94%	1.59%	1.58%	1.53%	1.84%	2.01%	1.64%	1.42%
<i>High</i>	1.8%	1.57%	1.73%	1.60%	1.27%	1.38%	1.59%	1.61%	1.43%	1.35%

E. Student / Housing Generation Rate(No Change).....Pg. 42

SCHOOL ADEQUATE PUBLIC FACILITIES ORDINANCE STATUS

(based on future year Student Membership Projections)

CHAPEL HILL/CARRBORO SCHOOL DISTRICT

Elementary School Level

- A. Does not currently exceed 105% LOS standard (current LOS is 95.3%).
- B. The projected growth rate at this level is expected to decrease over the next 10 years but remain positive (average ~1.4% per year compared to 2.0% over the past 10 years).
- C. Capacity has increased by 585 students due to the opening of Northside Elementary School. Projections show that Chapel Hill/Carrboro Elementary School #12 will be needed in 2020-21. This is one year earlier than last year’s projections.

Middle School Level

- A. Does not currently exceed 107% LOS standard (current LOS is 100.6%).
- B. The projected growth rate at this level is expected to increase at a greater rate over the next 10 years than it has in the previous 10 years (average ~1.6% compared to an average of 0.67% over the past 10 years).
- C. The planned addition to Culbreth Middle School for the 2014-15 school year is proposed to increase capacity with the addition of 104 seats. As a result, projections show that Chapel Hill/Carrboro Middle School #5 is projected to be needed in 2020-21. This is three years later than last year’s projections

High School Level

- A. Does not currently exceed the 110% LOS standard (current LOS is 97.1%).

- B. The projected growth rate at this level is expected to decrease, but remain positive over the next 10 years (average ~1.3% compared to 1.86% over the past 10 years).
- C. Expansion of Carrboro High School from the initial capacity of 800 students to the ultimate capacity of 1,200 students is projected to be needed in 2023-24. This is three years later than last year's projections which showed a need in 2020-21.

ORANGE COUNTY SCHOOL DISTRICT

Elementary School Level

- A. Does not currently exceed 105% LOS standard (current LOS is 92.9%).
- B. The projected growth rate at this level is expected decrease but remain positive over the next 10 years (average ~1.3% compared to 1.6% over the past 10 years).
- C. Orange County Elementary School # 8 is projected to be needed in 2023-24. This is a change from last year's projections which did not show a need for a new Elementary School in the 10 year projection period.

Middle School Level

- A. Does not currently exceed 107% LOS standard (current LOS is 80.7%).
- B. The projected growth rate at this level is expected to increase at a greater rate over the next 10 years (average ~1.4% compared to 0.35% over the past 10 years).
- C. Projections are not showing a need for an additional Middle School in the 10 year projection period. Staff continues to monitor 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 Level

- A. Does not currently exceed 110% LOS standard (current LOS is 99.3%).
- B. The projected growth rate at this level is expected to decrease but remain positive over the next 10 years (average ~1.4% compared to 2.4% over the past 10 years).
- C. Expansion of Cedar Ridge High School from the initial capacity of 500 students to the 1,500 students is projected to be needed in 2022-23. This is a change from last year's projections which did not show a need for additional capacity in the 10-year projection period.

Changes in CAPS (Certificate of Adequate Public Schools) System

As a result of a North Carolina Supreme Court ruling in August 2012, the local governments that are party to the SAPFO considered modification of their development regulations as they pertain to CAPS in 2013. However, at this time the local governments have not pursued revisions to existing standards contained within the CAPS system or SAPFO MOUs.

**ORANGE COUNTY
BOARD OF COMMISSIONERS**

ACTION AGENDA ITEM ABSTRACT

Meeting Date: March 18, 2014

**Action Agenda
Item No. 6-d**

SUBJECT: Schools Adequate Public Facilities Ordinance (SAPFO) – Receipt and Transmittal of 2014 Annual Technical Advisory Committee Report

DEPARTMENT: Planning & Inspections

PUBLIC HEARING: (Y/N)

No

ATTACHMENT(S):

1. SAPFO Partners Transmittal Letter
2. Draft 2014 SAPFOTAC Annual Report & Larger Scale Projection Worksheets

INFORMATION CONTACT:

Ashley Moncado, 919-245-2589
Perdita Holtz, 919-245-2578
Craig Benedict, 919-245-2592

PURPOSE: To receive the 2014 Annual Report of the SAPFO Technical Advisory Committee (SAPFOTAC) and transmit it to the SAPFO partners for comments before certification in May.

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 following spring, is to keep the SAPFO system calibrated. At the December 2, 2013 Board of County Commissioners meeting, the Board approved the November 15, 2013 actual membership and capacity numbers (i.e. first part) for both Orange County Schools and Chapel Hill-Carrboro City Schools.

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.

3. Membership Data

CHCCS total increase from the previous year: 52 students

- 11 Elementary School
- 73 Middle School

However, new construction activity has slowed in recent years due to the economic downturn. 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 and New Study

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 with the November 15, 2010 CAPS system update. Both Orange County Schools and Chapel Hill-Carrboro City Schools report having observed an even larger increase in students generated from new developments in both districts.

The SAPFOTAC discussed the increased number of students generated in both districts and proposed multi-family projects that may continue to have an effect on student membership numbers. While this may be a short term trend caused by the current economic climate or other factors, the SAPFOTAC recommended further evaluation of the adopted Student Generation Rates and the impacts different types of housing may have on student membership rates. As a result, Orange County will be entering into a contract with Tischler-Bise to study student generation rates for newer housing in the Orange County and Chapel Hill-Carrboro City School Districts.

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 2014 SAPFOTAC report will be brought back to the BOCC for certification at the May 8, 2014 regular meeting.

FINANCIAL IMPACT: Current 10-year student growth projections show future needs for additional schools in the CHCCS District. Elementary School #12 is projected to be needed in 2020-21, Middle School #5 is projected to be needed in 2020-21, and additional High School level capacity in the CHCCS District is projected to be needed in 2023-24. In the OCS District, Elementary School #8 is projected to be needed in 2023-24 and additional High School level capacity in the OCS District is projected to be needed in 2022-23.

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 2014 SAPFOTAC Annual Report; and
2. Authorize the Chair to sign the transmittal letter to SAPFO partners contained in Attachment 1.

(32) High School
 OCS total increase from the previous year: 199 students
 30 Elementary School
 63 Middle School
 106 High School
 () denotes decrease

4. Capacity Data

Capacity for Chapel Hill/Carrboro City Schools was increased by 585 students as a result of the opening of Northside Elementary School. There were no changes to school capacities this year for Orange County Schools.

5. Capacity Issues

SAPFO vs. DPI

The SAPFO is a local ordinance, independent of State Department of Public Instruction (DPI) projections and rules regarding class size. The SAPFO, for instance, does not count temporary modular classrooms as fulfilling the capacity level of service outlined in the SAPFO interlocal Memorandum of Understanding (MOU). The MOU requires 'bricks and mortar' instead of temporary facilities and also requires its own set of future student projections to identify long-term capital school construction needs. However, the County did phase in the smaller class size in previous years that decreased capacity. Decisions will have to be made if new discussions at the state level create any class size changes that should or shouldn't be reflected in the County's SAPFO.

This year, CHCCS does not exceed the adopted levels of service established in the SAPFO. Projections do show potential needs at the elementary, middle, and high school levels within the 10-year planning period. Projected needs are noted below.

Additionally, OCS does not exceed the adopted levels of service established in the SAPFO at this time nor do projections show potential needs at the middle school level within the 10-year planning period. However, projections do show a potential need at the elementary and high school level within the 10-year planning period. Projected needs are noted below.

6. Student Projection Analysis

Student membership projections show an increase at all levels in both school systems, except for a small projected decrease in 2014-15 at the high school level for OCS. The projections are shown on pages 37-38 of the report.

7. Orange County Schools Systems; CIP Needs Analysis

CHCCS

Projected needs:

New Elementary #12	2020-2021 (projected overage of 45 students; 105.8% LOS)
New Middle School #5	2020-2021 (projected overage of 39 students; 108.3% LOS)
High School	2023-2024 (projected overage of 6 students; 110.1% LOS)

OCS

Projected needs:

New Elementary # 8	2023-2024 (projected overage of 28 students; 105.7% LOS)
Middle School	projections show no needs in the next 10 years
High School	2022-23 (projected overage of 59 students; 112.4% LOS)

The SAPFOTAC report notes that there are a significant number of approved, but undeveloped lots within the portion of the City of Mebane that lies within Orange County.

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
2014

(BASED ON NOVEMBER 2013 DATA)

CERTIFIED BY THE BOCC ON MAY X, 2014

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2014 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>	5829	5554	11	3694	3433	30
<i>Middle</i>	2840	2858	73	2166	1747	63
<i>High</i>	3875	3764	(32)	2439	2421	106

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

II. Annual Update to SAPFO System

A. Capital Investment Plan (CIP).....(No 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 2013-14 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 2013-14 Membership				
	Actual 2013 Membership	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
Elementary	5554	5703 [160]	5604 [61]	5489 [(54)]	5572 [29]	5612 [58]
Middle	2858	2960 [177]	2848 [65]	2795 [12]	2796 [13]	2862 [4]
High	3764	3930 [134]	3792 [(4)]	3733 [(63)]	3783 [(13)]	3828 [64]

Analysis of 5 Years of Projections for 2013-14 School Year – Orange County 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 2013-14 Membership				
	Actual 2013 Membership	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
Elementary	3433	3337 [(166)]	3355 [(48)]	3435 [32]	3438 [35]	3433 [0]
Middle	1747	1708 [24]	1751 [67]	1732 [48]	1716 [32]	1733 [(14)]
High	2421	2254 [(61)]	2298 [(17)]	2258 [(57)]	2278 [(37)]	2355[(66)]

D. Student Growth Rate.....(Change).....Pg. 39

Projected Average Annual Growth Rate over Next 10 Years										
	Chapel Hill/Carrboro School District					Orange County School District				
Year Projection Made:	2009-10	2010-11	2011-12	2012-13	2013-14	2009-10	2010-11	2011-12	2012-13	2013-14
<i>Elementary</i>	1.72%	1.44%	1.59%	1.18%	1.44%	1.34%	1.57%	1.6%	1.31%	1.30%
<i>Middle</i>	1.93%	1.67%	1.94%	1.59%	1.58%	1.53%	1.84%	2.01%	1.64%	1.42%
<i>High</i>	1.8%	1.57%	1.73%	1.60%	1.27%	1.38%	1.59%	1.61%	1.43%	1.35%

E. Student / Housing Generation Rate.....(No Change).....Pg. 42

SCHOOL ADEQUATE PUBLIC FACILITIES ORDINANCE STATUS

(based on future year Student Membership Projections)

CHAPEL HILL/CARRBORO SCHOOL DISTRICT

Elementary School Level

- A. Does not currently exceed 105% LOS standard (current LOS is 95.3%).
- B. The projected growth rate at this level is expected to decrease over the next 10 years but remain positive (average ~1.4% per year compared to 2.0% over the past 10 years).
- C. Capacity has increased by 585 students due to the opening of Northside Elementary School. Projections show that Chapel Hill/Carrboro Elementary School #12 will be needed in 2020-21. This is one year earlier than last year’s projections.

Middle School Level

- A. Does not currently exceed 107% LOS standard (current LOS is 100.6%).
- B. The projected growth rate at this level is expected to increase at a greater rate over the next 10 years than it has in the previous 10 years (average ~1.6% compared to an average of 0.67% over the past 10 years).
- C. The planned addition to Culbreth Middle School for the 2014-15 school year is proposed to increase capacity with the addition of 104 seats. As a result, projections show that Chapel Hill/Carrboro Middle School #5 is projected to be needed in 2020-21. This is three years later than last year’s projections

High School Level

- A. Does not currently exceed the 110% LOS standard (current LOS is 97.1%).
- B. The projected growth rate at this level is expected to decrease, but remain positive over the next 10 years (average ~1.3% compared to 1.86% over the past 10 years).
- C. Expansion of Carrboro High School from the initial capacity of 800 students to the ultimate capacity of 1,200 students is projected to be needed in 2023-24. This is three years later than last year's projections which showed a need in 2020-21.

ORANGE COUNTY SCHOOL DISTRICT**Elementary School Level**

- A. Does not currently exceed 105% LOS standard (current LOS is 92.9%).
- B. The projected growth rate at this level is expected decrease but remain positive over the next 10 years (average ~1.3% compared to 1.6% over the past 10 years).
- C. Orange County Elementary School # 8 is projected to be needed in 2023-24. This is a change from last year's projections which did not show a need for a new Elementary School in the 10 year projection period.

Middle School Level

- A. Does not currently exceed 107% LOS standard (current LOS is 80.7%).
- B. The projected growth rate at this level is expected to increase at a greater rate over the next 10 years (average ~1.4% compared to 0.35% over the past 10 years).
- C. Projections are not showing a need for an additional Middle School in the 10 year projection period. Staff continues to monitor 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 Level

- A. Does not currently exceed 110% LOS standard (current LOS is 99.3%).
- B. The projected growth rate at this level is expected to decrease but remain positive over the next 10 years (average ~1.4% compared to 2.4% over the past 10 years).
- C. Expansion of Cedar Ridge High School from the initial capacity of 500 students to the 1,500 students is projected to be needed in 2022-23. This is a change from last year's projections which did not show a need for additional capacity in the 10-year projection period.

Changes in CAPS (Certificate of Adequate Public Schools) System

As a result of a North Carolina Supreme Court ruling in August 2012, the local governments that are party to the SAPFO considered modification of their development regulations as they pertain to CAPS in 2013. However, at this time the local governments have not pursued revisions to existing standards contained within the CAPS system or SAPFO MOUs.

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 affect 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)

Town of Carrboro
Trish McGuire, Planning Director
301 West Main Street
Carrboro, NC 27510

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 Planning Department
Craig Benedict, Planning Director and
Ashley Moncado, Special Projects Planner and
Paul Laughton, Deputy Director of Finance and Administrative Services
131 W. Margaret Lane
P.O. Box 8181
Hillsborough, NC 27278

Orange County School District
Gerri Martin, Superintendent
200 E. King Street
Hillsborough, NC 27278

Chapel Hill-Carrboro School District
Todd LoFrese, Assistant Superintendent for Support Services and
Catherine Mau, Coordinator of Student Enrollment
750 Merritt Mill Road
Chapel Hill, NC 27516

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 (serviced) at a certain school system grade group [i.e., Elementary level (K-5), Middle Level (6-8), High School Level (9-12)].

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%

- | | |
|--|--|
| <ul style="list-style-type: none"> 4. Analysis of Existing Conditions
Chapel Hill Carrboro School District
These standards are acceptable at this time. | <ul style="list-style-type: none"> Analysis of Existing Conditions
Orange County School District
These standards are acceptable at this time. |
|--|--|

- | | |
|--|---|
| <ul style="list-style-type: none"> 5. Recommendation –
No change from above standard | <ul style="list-style-type: none"> Recommendation –
No change from above standard |
|--|---|

Section I

B. Building Capacity

1. **Responsible Entity for Suggesting Change** – The Planning Directors, School Representatives, and 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:**

<p>Chapel Hill Carrboro School District</p> <p>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)</p> <p>Capacity changes were made each year as follows:</p> <p>2003: Increase of 619 at Rashkis Elementary.</p> <p>2004: No changes at Elementary, Middle, or High School levels.</p>	<p>Standard for:</p> <p>Orange County School District</p> <p>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)</p> <p>Capacity changes were made each year as follows:</p> <p>2003: No net increase in capacity at Elementary level. No changes at Middle</p>
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Section I

- 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
- 2011:** No changes at Elementary, Middle, or High School levels.
- 2012:** No changes at Elementary, Middle, or High School levels.
- 2013:** An increase in capacity of 585 students due to the opening of Northside Elementary School.
- 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.
- 2011:** No changes at Elementary, Middle, or High School levels.
- 2012:** No changes at Elementary or Middle

Section I

School levels. A decrease of 119 at High School level as a result of a N.C. Department of Public Instruction (DPI) study.

2013: No changes at Elementary, Middle, or High School levels.

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 2013-14 capacity is noted on
Attachment I.B.4

5. ***Recommendation –***

Accept school capacities at all levels, as reported by CHCCS and shown in 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 2013-14 capacity is noted on
Attachment I.B.3

Recommendation –

Accept school capacities at all levels, as reported by OCS and shown in Attachment I.B.3.

Attachment I.B.1
(page 1 of 3)
2012-13

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools
SAPFO CAPS Year: November 15, 2012 - November 14, 2013
Capacity and Membership Submittal Date: November 15, 2012

Elementary School	Square Feet	2008-2009 Requested Capacity	2009-2010 Requested Capacity	2010-2011 Requested Capacity	2011-2012 Requested Capacity	2012-2013 Requested Capacity	Justification Footnote #	Membership
Cameron Park	70,812	565	565	565	565	565		658
Central	52,492	455	455	455	455	455		319
Efland Cheeks	64,316	497	497	497	497	497		455
Grady Brown	74,016	544	544	544	544	544		455
Hillsborough	51,106	471	471	471	471	471		443
New Hope	100,164	586	586	586	586	586		624
Pathways	85,282	576	576	576	576	576		449
Total	498,188	3,694	3,694	3,694	3,694	3,694		3,403

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:

Patrick Rude 11-20-12
Superintendent Date

Benny J. [Signature] 12/4/12
BOCC Chair Date

Membership Certification:

Patrick Rude 11-20-12
Superintendent Date

Benny J. [Signature] 12/4/12
BOCC Chair Date

Attachment I.B.1
(page 2 of 3)
2012-13

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools
SAPFO CAPS Year: November 15, 2012 - November 14, 2013
Capacity and Membership Submittal Date: November 15, 2012

Middle School	Square Feet	2008-2009 Requested Capacity	2009-2010 Requested Capacity	2010-2011 Requested Capacity	2011-2012 Requested Capacity	2012-2013 Requested Capacity	Justification Footnote #	Membership
A.L. Stanback	136,000	740	740	740	740	740		603
C.W. Stanford	107,620	726	726	726	726	726		615
Gravelly Hill	123,000	700	700	700	700	700		466
Total	366,620	2,166	2,166	2,166	2,166	2,166		1,684

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 Rhodes 11-20-12
Superintendent Date

[Signature] 12/4/12
BOCC Chair Date

Membership Certification:

D. Patrick Rhodes 11-20-12
Superintendent Date

[Signature] 12/4/12
BOCC Chair Date

Attachment I.B.1
(page 3 of 3)
2012-13

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools

SAPFO CAPS Year: November 15, 2012 - November 14, 2013

Capacity and Membership Submittal Date: November 15, 2012

High School	Square Feet	2008-2009 Requested Capacity	2009-2010 Requested Capacity	2010-2011 Requested Capacity	2011-2012 Requested Capacity	2012-2013 Requested Capacity	Justification Footnote #	Membership
Orange	213,509	1,518	1,518	1,518	1,518	1,399	1	1,214
Cedar Ridge	206,900	1,000	1,000	1,000	1,000	1,000		1,077
Partnership	6,600	40	40	40	40	40		24
Total	427,009	2,558	2,558	2,558	2,558	2,439		2,315

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:

1. The new capacity requested for Orange High School (1,399) is based on a capacity analysis and facilities study completed by the Department of Public Instruction in August 2012.

Capacity Certification:

D. Patrick Rhodes 11-20-12
Superintendent Date

[Signature] 12/4/12
BOCC Chair Date

Membership Certification:

D. Patrick Rhodes 11-20-12
Superintendent Date

[Signature] 12/4/12
BOCC Chair Date

Attachment I.B.2
(page 1 of 3)
2012-13

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools
SAPFO CAPS Year: November 15, 2012 - November 14, 2013
Capacity and Membership Submittal Date: November 15, 2012

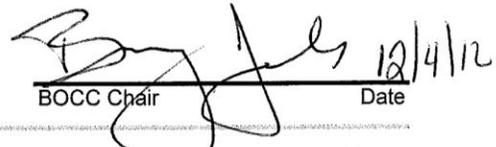
Elementary School	Square Feet	2008-2009 Requested Capacity	2009-2010 Requested Capacity	2010-2011 Requested Capacity	2011-2012 Requested Capacity	2012-2013 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Carrboro	60,832	533	533	533	533	533		579
Ephesus	66,952	448	448	448	448	448		491
Estes Hills	56,299	527	527	527	527	527		562
Glenwood	50,764	423	423	423	423	423		509
FP Graham	66,689	538	538	538	538	538		512
McDougle	98,000	564	564	564	564	564		523
Rashkis	95,729	585	585	585	585	585		505
Scroggs	90,980	575	575	575	575	575		600
Seawell	52,896	466	466	466	466	466		706
Morris Grove	90,221	585	585	585	585	585		556
Total	729,362	5,244	5,244	5,244	5,244	5,244		5,543

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:

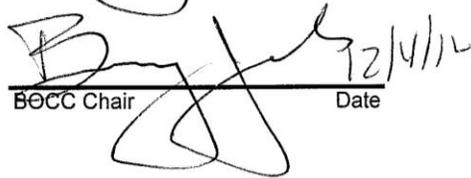
Capacity Certification:

 11/20/12
 Superintendent Date

 12/4/12
 BOCC Chair Date

Membership Certification:

 11/20/12
 Superintendent Date

 12/4/12
 BOCC Chair Date

Attachment I.B.2
(page 2 of 3)
2012-13

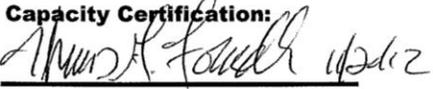
School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools
SAPFO CAPS Year: November 15, 2012 - November 14, 2013
Capacity and Membership Submittal Date: November 15, 2012

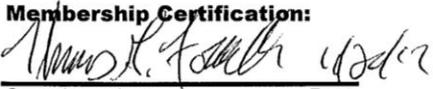
Middle School	Square Feet	2008-2009 Requested Capacity	2009-2010 Requested Capacity	2010-2011 Requested Capacity	2011-2012 Requested Capacity	2012-2013 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Culbreth	108,058	670	670	670	670	670		688
McDougle	136,221	732	732	732	732	732		700
Phillips	109,498	706	706	706	706	706		641
Smith	128,764	732	732	732	732	732		756
Total	482,541	2,840	2,840	2,840	2,840	2,840		2,785

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:

 Superintendent Date


 BOCC Chair Date

Membership Certification:

 Superintendent Date


 BOCC Chair Date

Attachment I.B.2
(page 3 of 3)
2012-13

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools
SAPFO CAPS Year: November 15, 2012 - November 14, 2013
Capacity and Membership Submittal Date: November 15, 2012

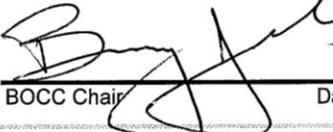
High School	Square Feet	2008-2009 Requested Capacity	2009-2010 Requested Capacity	2010-2011 Requested Capacity	2011-2012 Requested Capacity	2012-2013 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Chapel Hill	241,111	1,520	1,520	1,520	1,520	1,520		1,374
East Chapel Hill	259,869	1,515	1,515	1,515	1,515	1,515		1,474
Carrboro	148,023	800	800	800	800	800		918
Phoenix Acad.	5,207	0	0	40	40	40		30
Total	654,210	3,835	3,835	3,875	3,875	3,875		3,796

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:

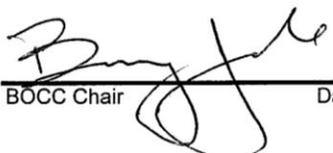
Capacity Certification:

 Superintendent _____ Date 11/24/12


 BOCC Chair _____ Date 12/4/12

Membership Certification:

 Superintendent _____ Date 11/24/12


 BOCC Chair _____ Date 12/4/12

Attachment I.B.3
(page 1 of 3)
2013-14

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools
SAPFO CAPS Year: November 15, 2013 - November 14, 2014
Capacity and Membership Submittal Date: November 15, 2013

Elementary School	Square Feet	2009-2010 Requested Capacity	2010-2011 Requested Capacity	2011-2012 Requested Capacity	2012-2013 Requested Capacity	2013-2014 Requested Capacity	Justification Footnote #	Membership
Cameron Park	70,812	565	565	565	565	565		658
Central	52,492	455	455	455	455	455		354
Efland Cheeks	64,316	497	497	497	497	497		459
Grady Brown	74,016	544	544	544	544	544		456
Hillsborough	51,106	471	471	471	471	471		453
New Hope	100,164	586	586	586	586	586		636
Pathways	85,282	576	576	576	576	576		417
Total	498,188	3,694	3,694	3,694	3,694	3,694		3,433

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:

 11/20/13
Superintendent Date

 12-3-13
BOCC Chair Date

Membership Certification:

 11/20/13
Superintendent Date

 12-3-13
BOCC Chair Date

Attachment I.B.3
(page 2 of 3)
2013-14

School APFO Capacity, Membership and Change Request Form

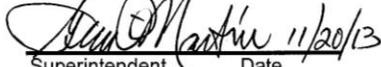
School District: Orange County Schools
SAPFO CAPS Year: November 15, 2013 - November 14, 2014
Capacity and Membership Submittal Date: November 15, 2013

Middle School	Square Feet	2009-2010 Requested Capacity	2010-2011 Requested Capacity	2011-2012 Requested Capacity	2012-2013 Requested Capacity	2013-2014 Requested Capacity	Justification Footnote #	Membership
A.L. Stanback	136,000	740	740	740	740	740		632
C.W. Stanford	107,620	726	726	726	726	726		639
Gravelly Hill	123,000	700	700	700	700	700		476
Total	366,620	2,166	2,166	2,166	2,166	2,166		1,747

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:


 Superintendent _____ Date 11/20/13


 BOCC Chair _____ Date 12-3-13

Membership Certification:


 Superintendent _____ Date 11/20/13


 BOCC Chair _____ Date 12-3-13

Attachment I.B.3
(page 3 of 3)
2013-14

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools
SAPFO CAPS Year: November 15, 2013 - November 14, 2014
Capacity and Membership Submittal Date: November 15, 2013

High School	Square Feet	2009-2010 Requested Capacity	2010-2011 Requested Capacity	2011-2012 Requested Capacity	2012-2013 Requested Capacity	2013-2014 Requested Capacity	Justification Footnote #	Membership
Orange	213,509	1,518	1,518	1,518	1,399	1,399		1,270
Cedar Ridge	206,900	1,000	1,000	1,000	1,000	1,000		1,130
Partnership	6,600	40	40	40	40	40		21
Total	427,009	2,558	2,558	2,558	2,439	2,439		2,421

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. The 2012-2013 capacity numbers for Orange High School (1,399) is based on a capacity analysis and facilities study completed by the Department of Public Instruction in August 2012.

Justification:

Capacity Certification:

[Signature] 11/20/13
Superintendent Date

[Signature] 12-3-13
BOCC Chair Date

Membership Certification:

[Signature] 11/20/13
Superintendent Date

[Signature] 12-3-13
BOCC Chair Date

Attachment I.B.4
(page 1 of 3)
2013-14

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools

SAPFO CAPS Year: November 15, 2013 - November 14, 2014

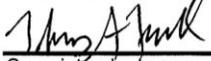
Capacity and Membership Submittal Date: November 15, 2013

Elementary School	Square Feet	2009-2010 Requested Capacity	2010-2011 Requested Capacity	2011-2012 Requested Capacity	2012-2013 Requested Capacity	2013-2014 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Carrboro	60,832	533	533	533	533	533		461
Ephesus	66,952	448	448	448	448	448		436
Estes Hills	56,299	527	527	527	527	527		500
Glenwood	50,764	423	423	423	423	423		522
FP Graham	66,689	538	538	538	538	538		484
McDougle	98,000	564	564	564	564	564		497
Rashkis	95,729	585	585	585	585	585		522
Scroggs	90,980	575	575	575	575	575		552
Seawell	52,896	466	466	466	466	466		539
Morris Grove	90,221	585	585	585	585	585		548
Northside	99,500	0	0	0	0	585		493
Total	828,862	5,244	5,244	5,244	5,244	5,829		5,554

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.

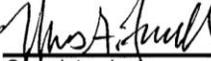
Justification:

Capacity Certification:

 11/21/13
 Superintendent Date

 12-3-13
 BOCC Chair Date

Membership Certification:

 11/21/13
 Superintendent Date

 12-3-13
 BOCC Chair Date

Attachment I.B.4
(page 2 of 3)
2013-14

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools
SAPFO CAPS Year: November 15, 2013 - November 14, 2014
Capacity and Membership Submittal Date: November 15, 2013

Middle School	Square Feet	2009-2010 Requested Capacity	2010-2011 Requested Capacity	2011-2012 Requested Capacity	2012-2013 Requested Capacity	2013-2014 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Culbreth	108,058	670	670	670	670	670		699
McDougle	136,221	732	732	732	732	732		705
Phillips	109,498	706	706	706	706	706		658
Smith	128,764	732	732	732	732	732		796
Total	482,541	2,840	2,840	2,840	2,840	2,840		2,858

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:

 Superintendent Date


 BOCC Chair Date 12-3-13

Membership Certification:

 Superintendent Date


 BOCC Chair Date 12-3-13

Attachment I.B.4
(page 3 of 3)
2013-14

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools
SAPFO CAPS Year: November 15, 2013 - November 14, 2014
Capacity and Membership Submittal Date: November 15, 2013

High School	Square Feet	2009-2010 Requested Capacity	2010-2011 Requested Capacity	2011-2012 Requested Capacity	2012-2013 Requested Capacity	2013-2014 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Chapel Hill	241,111	1,520	1,520	1,520	1,520	1,520		1,423
East Chapel Hill	259,869	1,515	1,515	1,515	1,515	1,515		1,413
Carrboro	148,023	800	800	800	800	800		898
Phoenix Acad.	5,207	0	40	40	40	40		30
Total	654,210	3,835	3,875	3,875	3,875	3,875		3,764

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:

 Superintendent _____ Date 11/20/13


 BOCC Chair _____ Date 12-3-13

Membership Certification:

 Superintendent _____ Date 11/20/13


 BOCC Chair _____ Date 12-3-13

Section II

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, and 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. ***Standard for:***

Chapel Hill Carrboro School District	Orange County School District
November 15 of each year	November 15 of each year
4. ***Analysis of Existing Conditions***

This will be analyzed in the future years to determine if it is an exemplary date.
4. ***Recommendation*** –

No change at this time	<i>Recommendation</i> – No change at this time
------------------------	--

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	Orange County School District
Not Applicable	Not Applicable

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, 2014.

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, and 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:**

Chapel Hill Carrboro School District

Orange County School District

Presently, the average of five models is 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 2013-14 school year from the prior year projection.

5. **Recommendation** –

More than ten 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 have 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. Although construction activity in this portion of the county has slowed, there are still a substantial number of approved, but undeveloped residential lots.

Attachment II.B.1

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	$BYM + (BYI \cdot 5(n)) = EYM$ $EYM \cdot \%SL = EYMSL$ 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); EYMSL=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	$BYM + (BYI \cdot 15(n)) = EYM$ $EYM \cdot \%SL = EYMSL$ 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); EYMSL=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	$K_n = k_{n-1} + (k_{n-1} \cdot 0.01)$ $a = \frac{\sum_{n=1}^3 G_n / g_{n-1}}{3}$ $b = g_{n-1} (a)$ 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	$K_n = k_{n-1} + (k_{n-1} \cdot 0.01)$ $a = \frac{\sum_{n=1}^5 G_n / g_{n-1}}{5}$ $b = g_{n-1} (a)$ 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	$K_n = k_{n-1} + (k_{n-1} \cdot 0.01)$ $a = \frac{\sum_{n=1}^{10} G_n / g_{n-1}}{10}$ $b = g_{n-1} (a)$ 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 2012-13 School Year (November 15, 2012)**

	11/15/11 Actual 2011-12	2012 Report Projection for 2012-13	11/15/12 Actual 2012-13	Change between actual Nov 2011 - Nov 2012
Elementary	3348		3403	+55
Model			Projection is	
T		3407	H4	
OCP		3407	H4	
10C		3455	H52	
5C		3447	H44	
3C		3472	H69	
AVG		3438	H35	
			<u>11/15/2012</u>	
Middle	1704		1684	-20
Model			Projection is	
T		1734	H50	
OCP		1759	H75	
10C		1691	H7	
5C		1700	H16	
3C		1697	H13	
AVG		1716	H32	
			<u>11/15/2012</u>	
High	2283		2315	+32
Model			Projection is	
T		2323	H8	
OCP		2289	L26	
10C		2248	L67	
5C		2265	L50	
3C		2264	L51	
AVG		2278	L37	
			<u>11/15/2012</u>	
Totals				
Elementary	3348		3403	
Middle	1704		1684	
High	<u>2283</u>		<u>2315</u>	
	7335		7402	+67
Model			Projection is	
T		7464	H62	
OCP		7455	H53	
10C		7394	L8	
5C		7412	H10	
3C		7433	H31	
AVG		7432	H30	

H means High

L means Low

**Orange County School District
School Membership 2012-2013 School Year (November 15, 2012)**

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 4 students to 69 students high. The average of the projections was 35 students higher than actual student membership.
- The membership actually increased by 55 students between November 15, 2011 and November 15, 2012.

Middle School Level

- Projections were all high, ranging from 7 students to 75 students high. On average, the projections were 32 students higher than the actual membership.
- The membership actually decreased by 20 students between November 15, 2011 and November 15, 2012.

High School Level

- Projections were primarily low ranging from being low by 67 students to 8 students high. On average, the projections were 37 students lower than the actual membership.
- The membership actually increased by 32 students between November 15, 2011 and November 15, 2012.

TOTAL

- The totals of all school level projections were primarily high, ranging from 8 below actual membership to 62 above actual membership. On average, the projections were high by 30 students.
- The membership increased in total by 67 students, which is the sum of +55 at Elementary, -20 at Middle and +67 at High.

**Chapel Hill/Carrboro School District
School Membership 2012-2013 School Year (November 15, 2012)**

	11/15/11 Actual 2011-12	2012 Report Projection for 2012-13	11/15/12 Actual 2012-13	Change between actual Nov 2011- Nov 2012
Elementary	5464		5543	+79
Model			Projection is	
T		5563	H20	
OCP		5531	L12	
10C		5609	H66	
5C		5594	H51	
3C		5565	H22	
AVG		5572	H29	
			<u>11/15/2012</u>	
Middle	2753		2785	+32
Model			Projection is	
T		2803	H18	
OCP		2796	H11	
10C		2807	H22	
5C		2802	L17	
3C		2774	L11	
AVG		2796	H11	
			<u>11/15/2012</u>	
High	3617		3796	+82
Model			Projection is	
T		3781	L15	
OCP		3829	H33	
10C		3774	L22	
5C		3765	L31	
3C		3766	L30	
AVG		3783	L13	
Totals			<u>11/15/2012</u>	
Elementary	5464		5543	
Middle	2753		2785	
High	<u>3714</u>		<u>3796</u>	
	11931		12124	+193
Model			Projection is	
T		12147	H23	
OCP		12156	H32	
10C		12190	H66	
5C		12161	H37	
3C		12105	L19	
AVG		12151	H27	

H means High
L means Low

**Chapel Hill/Carrboro School District
School Membership 2012-2013 School Year (November 15, 2012)**

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 high, ranging from 12 students low to 66 students high. On average, the projections were 29 students higher than the actual membership.
- The actual membership increased by 79 students between November 15, 2011 and November 15, 2012.

Middle School Level

- Projections were mixed low and high, ranging from 17 students low to 22 students high. On average, the projections were 11 students higher than the actual membership.
- The actual membership increased by 32 students between November 15, 2011 and November 15, 2012.

High School Level

- Projections were primarily low, ranging from 31 students low to 33 students high. On average, the projections were 13 students lower than the actual membership.
- The actual membership increased by 82 students between November 15, 2011 and November 15, 2012.

TOTAL

- The total of all school level projections were primarily high, ranging from 19 below actual membership to 66 student above actual membership. On average the projections were high by 27 students.
- The membership increased in total by 193 students, which is the sum of +79 at Elementary, +32 at Middle, and +82 at High.

Section II

Orange County School District
School Membership 2013-14 School Year (November 15, 2013)

	11/15/12 Actual 2012-13	2013 Report Projection for 2013-14	11/15/13 Actual 2013-14	Change between actual Nov 2012 - Nov 2013
Elementary	3403		3433	+30
<u>Model</u>			<u>Projection is</u>	
T		3460	H27	
OCP		3462	H29	
10C		3416	L17	
5C		3415	L18	
3C		3411	L22	
AVG		3433		
			<u>11/15/2013</u>	
Middle	1684		1747	+63
<u>Model</u>			<u>Projection is</u>	
T		1712	L35	
OCP		1709	L38	
10C		1750	H3	
5C		1755	H8	
3C		1740	L7	
AVG		1733	L14	
			<u>11/15/2013</u>	
High	2315		2421	+106
<u>Model</u>			<u>Projection is</u>	
T		2354	L67	
OCP		2356	L65	
10C		2334	L87	
5C		2362	L59	
3C		2367	L54	
AVG		2355	L66	
			<u>11/15/2013</u>	
Totals				
Elementary	3403		3433	
Middle	1684		1747	
High	<u>2315</u>		<u>2421</u>	
	7402		7601	+199
<u>Model</u>			<u>Projection is</u>	
T		7526	L75	
OCP		7527	L74	
10C		7500	L101	
5C		7532	L69	
3C		7518	L83	
AVG		7521	L80	

H means High
L means Low

**Orange County School District
School Membership 2013-2014 School Year (November 15, 2013)**

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 mixed low and high, ranging from 22 students low to 29 students high. The average of the projections equaled actual student membership.
- The membership actually increased by 30 students between November 15, 2012 and November 15, 2013.

Middle School Level

- Projections were mixed low and high, ranging from 38 students low to 8 students high. On average, the projections were 14 students lower than the actual membership.
- The membership actually increased by 63 students between November 15, 2012 and November 15, 2013.

High School Level

- Projections were all low ranging from 54 students to 87 students low. On average, the projections were 66 students lower than the actual membership.
- The membership actually increased by 106 students between November 15, 2012 and November 15, 2013.

TOTAL

- The totals of all school level projections were low, ranging from 69 to 101 below actual membership. On average, the projections were low by 80 students.
- The membership increased in total by 199 students, which is the sum of +30 at Elementary, +63 at Middle, and +106 at High.

**Chapel Hill/Carrboro School District
School Membership 2013-14 School Year (November 15, 2013)**

	11/15/12 Actual 2012-13	2013 Report Projection for 2013-14	11/15/13 Actual 2013-14	Change between actual Nov 2012- Nov 2013
Elementary	5543		5554	+11
Model			Projection is	
T		5643	H89	
OCP		5643	H89	
10C		5603	H49	
5C		5583	H29	
3C		5589	H35	
AVG		5612	H58	
11/15/2013				
Middle	2785		2858	+73
Model			Projection is	
T		2835	L23	
OCP		2840	L18	
10C		2888	H30	
5C		2873	H15	
3C		2872	H14	
AVG		2862	H4	
11/15/2013				
High	3796		3764	-32
Model			Projection is	
T		3864	H100	
OCP		3890	H126	
10C		3794	H30	
5C		3782	H18	
3C		3810	H46	
AVG		3828	H64	
11/15/2013				
Totals			11/15/2013	
Elementary	5543		5554	
Middle	2785		2858	
High	3796		3764	
	12,124		12,176	+52
Model			Projection is	
T		12,342	H166	
OCP		12,373	H197	
10C		12,285	H109	
5C		12,238	H62	
3C		12,271	H95	
AVG		12,302	H126	

H means High
L means Low

**Chapel Hill/Carrboro School District
School Membership 2013-2014 School Year (November 15, 2013)**

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 29 students to 89 students high. On average, the projections were 58 students higher than the actual membership.
- The actual membership increased by 11 students between November 15, 2012 and November 15, 2013.

Middle School Level

- Projections were mixed low and high, ranging from 23 students low to 30 students high. On average, the projections were 4 students higher than the actual membership.
- The actual membership increased by 73 students between November 15, 2012 and November 15, 2013.

High School Level

- Projections were all high, ranging from 18 students to 126 students high. On average, the projections were 64 students higher than the actual membership.
- The actual membership decreased by 32 students between November 15, 2012 and November 15, 2013.

TOTAL

- The total of all school level projections were all high, ranging from 62 students to 197 students above actual membership. On average, the projections were high by 126 students.
- The membership increased in total by 52 students, which is the sum of +11 at Elementary, +73 at Middle, and -32 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, and 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).

3. **Standard for:**

Chapel Hill Carrboro School District

The 5 model average discussed in Section II.B
(Student Projection Methodology)
See Attachment II.C.4

Standard for:

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. Average projected growth rates in the next 10 years for both school systems are quite similar and follow the same growth pattern for each individual school year. Both school systems are showing a projected decrease in the increase, but are still showing positive growth at the Elementary and Middle School levels. Orange County High School is projected to experience a negative growth rate in 2014-15 followed by positive growth rates for the remaining 10 year projections. Chapel Hill/Carrboro High School is showing varying positive growth rates over the next ten years. Year-by-year percent growth is shown on the attached table as well as the projected LOS. The projection models were updated using current (November 15, 2013) memberships. Ten years of student membership were projected thereafter.

Chapel Hill Carrboro School District

Elementary

The previous year (2012-13) projections for November 2013 at this level were overestimated by 58 students. The actual membership increased by 11 students. Over the previous ten years, this level has shown varying increases in growth rates including a decrease in actual membership in 2009-10 which was most likely due to the shorter enrollment period caused by the institution of the new date requiring kindergarteners to be five years old. Following that dip, membership numbers are again increasing, with a significant jump (168 students) in 2011-12. This large increase was followed by smaller increases in 2012-13 of 79 students and in 2013-14 of only 11 students. Growth rates during the past ten years have ranged from -1.57% to +3.92%.

Elementary School #11 (Northside Elementary) opened for the 2013-14 school year with a capacity of 585 seats. The projections this year are showing the need for Elementary School #12 in 2020-21, which is one year earlier than last year's projections.

Although not included in SAPFO school capacity or membership numbers, Pre-K programs continue to impact operations at District elementary schools where Pre-K programs exist. Specific impacts of Pre-K programs at the elementary school level will continue to be reviewed and discussed in the coming year.

Middle

The previous year (2012-13) projections for November 2013 for this level were overestimated by 4 students. The actual membership increased by 73. Over the previous ten years, growth has been quite variable and included a decrease in actual membership in 2004-05. Following this decrease, membership and growth rates have experienced increases every school year since. Growth rates during this time period have ranged from -1.99% to +2.86 percent with most years showing a growth rate of around 1% or less. The planned addition to Culbreth Middle School for the 2014-15 school year is proposed to increase capacity with the addition of 104 seats. As a result, projections show that Chapel Hill/Carrboro Middle School #5 is projected to be needed in 2020-21. This is three years later than last year's projections. The proposed addition to Culbreth Middle School was approved in the 2013-14 CIP for the 2014-15 school year. Although capacity was projected to be available, a decision was made to fund the expansion and increase capacity.

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The additional capacity resulting from the approved addition has been included in the student projections.

High School

The previous year (2012-13) projections for November 2013 for this level were overestimated by 64 students. The actual membership decreased by 32 students. Over the previous ten years, change has been variable with decreases in membership in 2008-09 and in 2009-10. Following these decreases, membership and growth rates began increasing again within the last three years before experiencing another decrease this year (2013-14). Growth rates during this time period have ranged from -0.84% to +5.31%. This year's projections show that additional capacity is needed in 2023-24, which is three years later than last year's projection. Additional High School capacity is expected to be achieved by expanding Carrboro High School from 800 students to 1,200 students, which was included in the construction plans for the high school.

Additional Information for Chapel Hill Carrboro School District

Currently, one Charter School, PACE Academy, serves high school students residing in the Chapel Hill/Carrboro School District. This school is not included as part of the SAPFO Annual Report and, as a result, its membership and capacity is not monitored or included in future projections. On February 6, 2014 PACE Academy had their charter revoked for the 2014-2015 school year. Administrators are currently exploring the appeal process with the State Board of Education. However, CHCCS student membership may experience an increase in 2014-15 due to the influx of students from PACE Academy becoming part of the Chapel Hill/Carrboro School District if the school's charter is not renewed through the appeals process.

Orange County School District

Elementary

The previous year (2012-13) projections for November 2013 at this level were equal to student membership. Actual membership increased by 30 students. Over the previous ten years, this level has experienced varying growth rates including a decrease in membership in 2005-06. Following this decrease, membership and growth rates have experienced increases every school year since. Growth rates during this period have ranged from -0.33% to +2.80%. 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

Section II

older, existing housing stock. Projections this year are showing the need for Elementary School #8 in 2023-24 when the LOS is expected to be 105.7%.

Although not included in SAPFO school capacity or membership numbers, Pre-K programs continue to impact operations at District elementary schools where Pre-K programs exist. Specific impacts of Pre-K programs at the elementary school level will continue to be reviewed and discussed in the coming year.

Middle

The previous year (2012-13) projections for November 2013 for this level were underestimated by 14 students. The actual membership increased by 63. Over the previous ten years, growth has varied widely and includes decreases in student membership in five of the ten years. Growth rates during this period have ranged from -4.67% to +4.00%. 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 (2012-13) projections for November 2013 for this level were underestimated by 66 students. The actual membership increased by 106. Over the previous ten years, growth varied considerably and included a decrease in membership in 2009-10. Following this decrease, membership and growth rates have experienced increases every school year since. Growth rates during this period ranged from -1.12% to 9.01%. In 2011-12 student membership increased by 32 while capacity decreased by 199 at Orange County High School as a result of a N.C. Department of Public Instruction (DPI) study. This year's projections show that additional capacity is needed in 2022-23. This is different from last year's projections which did not show a need for additional capacity in the 10-year projection period.

Additional High School capacity is expected to be achieved by expanding Cedar Ridge High School from 1,000 students to 1,500 students. This addition is currently included in the five year CIP as a request for funding. At this time, a decision has not been made approving the proposed addition. Once a funding decision is made and approved, the increased capacity from the proposed addition may be included in the student projections.

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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 require that CAPS (Certificate of Adequate Public Schools) be issued prior to development approvals. In previous years, development activity and platting of new subdivisions increased within the Orange County portion of Mebane. However, changed economic conditions have curbed new platting and new construction in the past few years. An uptick in residential activity is likely as the country emerges from “The Great Recession.” 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 development in the Orange County portion of Mebane could quickly encumber available capacity.

Following the economic downturn, there has been an increase in multi-family residential development which has added to increasing student memberships in both districts. The ongoing future demand for multi-family housing is evident throughout the county, but especially within the Town of Hillsborough which is facing the proposed development of 700 multi-family units in the near future. Staff will need to continue monitoring and evaluating the demand and growth of the multi-family market in Hillsborough and the entire county as well as its effect on student membership rates.

Currently, one charter school is located in the Town of Hillsborough and serves students that reside in the Orange County School District. This school is not included as part of the SAPFO Annual Report and as a result its membership and capacity is not monitored or included in future projections. An additional charter school is being proposed in the Town of Hillsborough for the 2014-15 school year. As a result, OCS student memberships may experience a decrease in 2014-15 due to a loss of students enrolling in the new charter school.

5. ***Recommendation –***

Use statistics as noted in 3 above

OCS Student Projections (1) (4)

REVISED 01/18/13

School Year	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
Actual	3,178	3,493	3,811	4,126	4,441	4,756	5,071	5,386	5,701	6,016	6,331	6,646	6,961	7,276	7,591	7,906	8,221	8,536	8,851	9,166	9,481	9,796	10,111
Projected																							
10% Level of Service	3,020	3,250	3,480	3,710	3,940	4,170	4,400	4,630	4,860	5,090	5,320	5,550	5,780	6,010	6,240	6,470	6,700	6,930	7,160	7,390	7,620	7,850	8,080
15% Level of Service	4,911	5,141	5,371	5,601	5,831	6,061	6,291	6,521	6,751	6,981	7,211	7,441	7,671	7,901	8,131	8,361	8,591	8,821	9,051	9,281	9,511	9,741	9,971
Annual Change - Increase (Decrease) in Actual & Projected Membership	320	310	300	290	280	270	260	250	240	230	220	210	200	190	180	170	160	150	140	130	120	110	100
Capacity - 100% Level of Service	3,020	3,250	3,480	3,710	3,940	4,170	4,400	4,630	4,860	5,090	5,320	5,550	5,780	6,010	6,240	6,470	6,700	6,930	7,160	7,390	7,620	7,850	8,080
Number of Students Actual and Projected, Over (Under) 100% LOS	(850)	(757)	(664)	(571)	(478)	(385)	(292)	(200)	(107)	(15)	78	181	284	387	490	593	696	799	902	1,005	1,108	1,211	1,314
10% Level of Service	3,020	3,250	3,480	3,710	3,940	4,170	4,400	4,630	4,860	5,090	5,320	5,550	5,780	6,010	6,240	6,470	6,700	6,930	7,160	7,390	7,620	7,850	8,080
Number of Students Actual and Projected, Over (Under) 100% LOS	(850)	(757)	(664)	(571)	(478)	(385)	(292)	(200)	(107)	(15)	78	181	284	387	490	593	696	799	902	1,005	1,108	1,211	1,314
Annual Student Growth Rate (%)	4.61%	4.73%	4.85%	4.97%	5.09%	5.21%	5.33%	5.45%	5.57%	5.69%	5.81%	5.93%	6.05%	6.17%	6.29%	6.41%	6.53%	6.65%	6.77%	6.89%	7.01%	7.13%	7.25%

(1) It is important to note that the effect of the November 15, 2012 date of membership as outlined by the Schools Adequate Public Facilities Ordinance, or The Teacher Model provides for the "Linear Method" of Projections for both CHCS and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCS. Annual growth rate calculated using actual membership for years 2000-01 through 2011-12 and average membership for years 2013-14 through 2022-23. (2) Class sizes for grades K-5 for school years 2000 through 2007-08. In accordance with 2008 School Collaboration Work Group direction, effective the 2008-2009 school year with the opening of CHCS Elementary #10, K-5 class sizes are 17 as directed by past State legislative action. (3) Indicates when district surpasses Schools APFO recommended Level of Service. (4) Indicates when district surpasses Schools APFO recommended Level of Service.

OCS Student Projections (1)

School Year	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
Actual	1,536	1,572	1,608	1,644	1,680	1,716	1,752	1,788	1,824	1,860	1,896	1,932	1,968	2,004	2,040	2,076	2,112	2,148	2,184	2,220	2,256	2,292	2,328
Projected																							
10% Level of Service	1,466	1,502	1,538	1,574	1,610	1,646	1,682	1,718	1,754	1,790	1,826	1,862	1,898	1,934	1,970	2,006	2,042	2,078	2,114	2,150	2,186	2,222	2,258
15% Level of Service	1,989	2,038	2,087	2,136	2,185	2,234	2,283	2,332	2,381	2,430	2,479	2,528	2,577	2,626	2,675	2,724	2,773	2,822	2,871	2,920	2,969	3,018	3,067
Annual Change - Increase (Decrease) in Actual & Projected Membership	70	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	
Capacity - 100% Level of Service	1,466	1,502	1,538	1,574	1,610	1,646	1,682	1,718	1,754	1,790	1,826	1,862	1,898	1,934	1,970	2,006	2,042	2,078	2,114	2,150	2,186	2,222	
Number of Students Actual and Projected, Over (Under) 100% LOS	70	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	
10% Level of Service	1,466	1,502	1,538	1,574	1,610	1,646	1,682	1,718	1,754	1,790	1,826	1,862	1,898	1,934	1,970	2,006	2,042	2,078	2,114	2,150	2,186	2,222	
Number of Students Actual and Projected, Over (Under) 100% LOS	70	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	36	
Annual Student Growth Rate (%)	4.52%	4.61%	4.70%	4.79%	4.88%	4.97%	5.06%	5.15%	5.24%	5.33%	5.42%	5.51%	5.60%	5.69%	5.78%	5.87%	5.96%	6.05%	6.14%	6.23%	6.32%	6.41%	6.50%

(1) It is important to note that the effect of the November 15, 2012 date of membership as outlined by the Schools Adequate Public Facilities Ordinance, or The Teacher Model provides for the "Linear Method" of Projections for both CHCS and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCS. Annual growth rate calculated using actual membership for years 2000-01 through 2011-12 and average membership for years 2013-14 through 2022-23. (2) Class sizes for grades K-5 for school years 2000 through 2007-08. In accordance with 2008 School Collaboration Work Group direction, effective the 2008-2009 school year with the opening of CHCS Elementary #10, K-5 class sizes are 17 as directed by past State legislative action. (3) Indicates when district surpasses Schools APFO recommended Level of Service. (4) Indicates when district surpasses Schools APFO recommended Level of Service.

OCS Student Projections (1)

School Year	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
Actual	1,672	1,733	1,794	1,855	1,916	1,977	2,038	2,099	2,160	2,221	2,282	2,343	2,404	2,465	2,526	2,587	2,648	2,709	2,770	2,831	2,892	2,953	3,014
Projected																							
10% Level of Service	1,584	1,633	1,682	1,731	1,780	1,829	1,878	1,927	1,976	2,025	2,074	2,123	2,172	2,221	2,270	2,319	2,368	2,417	2,466	2,515	2,564	2,613	2,662
15% Level of Service	2,107	2,166	2,225	2,284	2,343	2,402	2,461	2,520	2,579	2,638	2,697	2,756	2,815	2,874	2,933	2,992	3,051	3,110	3,169	3,228	3,287	3,346	3,405
Annual Change - Increase (Decrease) in Actual & Projected Membership	88	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	
Capacity - 100% Level of Service	1,584	1,633	1,682	1,731	1,780	1,829	1,878	1,927	1,976	2,025	2,074	2,123	2,172	2,221	2,270	2,319	2,368	2,417	2,466	2,515	2,564	2,613	
Number of Students Actual and Projected, Over (Under) 100% LOS	88	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	
10% Level of Service	1,584	1,633	1,682	1,731	1,780	1,829	1,878	1,927	1,976	2,025	2,074	2,123	2,172	2,221	2,270	2,319	2,368	2,417	2,466	2,515	2,564	2,613	
Number of Students Actual and Projected, Over (Under) 100% LOS	88	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	
Annual Student Growth Rate (%)	4.84%	4.93%	5.02%	5.11%	5.20%	5.29%	5.38%	5.47%	5.56%	5.65%	5.74%	5.83%	5.92%	6.01%	6.10%	6.19%	6.28%	6.37%	6.46%	6.55%	6.64%	6.73%	6.82%

(1) It is important to note that the effect of the November 15, 2012 date of membership as outlined by the Schools Adequate Public Facilities Ordinance, or The Teacher Model provides for the "Linear Method" of Projections for both CHCS and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCS. Annual growth rate calculated using actual membership for years 2000-01 through 2011-12 and average membership for years 2013-14 through 2022-23. (2) Class sizes for grades K-5 for school years 2000 through 2007-08. In accordance with 2008 School Collaboration Work Group direction, effective the 2008-2009 school year with the opening of CHCS Elementary #10, K-5 class sizes are 17 as directed by past State legislative action. (3) Indicates when district surpasses Schools APFO recommended Level of Service. (4) Indicates when district surpasses Schools APFO recommended Level of Service.

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CHCCS Student Projections (1) (4)

Elementary School Year	2009-10	2007-08	2005-06	2003-04	2001-02	2009-10	2007-08	2005-06	2003-04	2001-02	2009-10	2007-08	2005-06	2003-04	2001-02	2009-10	2007-08	2005-06	2003-04	2001-02	2009-10	2007-08	2005-06	2003-04	2001-02	2009-10	2007-08	2005-06	2003-04	2001-02																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																													
Actual	2,115	2,383	2,400	2,413	2,350	2,372	2,401	2,422	2,401	2,370	2,353	2,370	2,385	2,405	2,418	2,385	2,365	2,335	2,300	2,270	2,325	2,345	2,355	2,370	2,385	2,400	2,415	2,430	2,445	2,460	2,475	2,490	2,505	2,520	2,535	2,550	2,565	2,580	2,595	2,610	2,625	2,640	2,655	2,670	2,685	2,700	2,715	2,730	2,745	2,760	2,775	2,790	2,805	2,820	2,835	2,850	2,865	2,880	2,895	2,910	2,925	2,940	2,955	2,970	2,985	3,000	3,015	3,030	3,045	3,060	3,075	3,090	3,105	3,120	3,135	3,150	3,165	3,180	3,195	3,210	3,225	3,240	3,255	3,270	3,285	3,300	3,315	3,330	3,345	3,360	3,375	3,390	3,405	3,420	3,435	3,450	3,465	3,480	3,495	3,510	3,525	3,540	3,555	3,570	3,585	3,600	3,615	3,630	3,645	3,660	3,675	3,690	3,705	3,720	3,735	3,750	3,765	3,780	3,795	3,810	3,825	3,840	3,855	3,870	3,885	3,900	3,915	3,930	3,945	3,960	3,975	3,990	4,005	4,020	4,035	4,050	4,065	4,080	4,095	4,110	4,125	4,140	4,155	4,170	4,185	4,200	4,215	4,230	4,245	4,260	4,275	4,290	4,305	4,320	4,335	4,350	4,365	4,380	4,395	4,410	4,425	4,440	4,455	4,470	4,485	4,500	4,515	4,530	4,545	4,560	4,575	4,590	4,605	4,620	4,635	4,650	4,665	4,680	4,695	4,710	4,725	4,740	4,755	4,770	4,785	4,800	4,815	4,830	4,845	4,860	4,875	4,890	4,905	4,920	4,935	4,950	4,965	4,980	4,995	5,010	5,025	5,040	5,055	5,070	5,085	5,100	5,115	5,130	5,145	5,160	5,175	5,190	5,205	5,220	5,235	5,250	5,265	5,280	5,295	5,310	5,325	5,340	5,355	5,370	5,385	5,400	5,415	5,430	5,445	5,460	5,475	5,490	5,505	5,520	5,535	5,550	5,565	5,580	5,595	5,610	5,625	5,640	5,655	5,670	5,685	5,700	5,715	5,730	5,745	5,760	5,775	5,790	5,805	5,820	5,835	5,850	5,865	5,880	5,895	5,910	5,925	5,940	5,955	5,970	5,985	6,000	6,015	6,030	6,045	6,060	6,075	6,090	6,105	6,120	6,135	6,150	6,165	6,180	6,195	6,210	6,225	6,240	6,255	6,270	6,285	6,300	6,315	6,330	6,345	6,360	6,375	6,390	6,405	6,420	6,435	6,450	6,465	6,480	6,495	6,510	6,525	6,540	6,555	6,570	6,585	6,600	6,615	6,630	6,645	6,660	6,675	6,690	6,705	6,720	6,735	6,750	6,765	6,780	6,795	6,810	6,825	6,840	6,855	6,870	6,885	6,900	6,915	6,930	6,945	6,960	6,975	6,990	7,005	7,020	7,035	7,050	7,065	7,080	7,095	7,110	7,125	7,140	7,155	7,170	7,185	7,200	7,215	7,230	7,245	7,260	7,275	7,290	7,305	7,320	7,335	7,350	7,365	7,380	7,395	7,410	7,425	7,440	7,455	7,470	7,485	7,500	7,515	7,530	7,545	7,560	7,575	7,590	7,605	7,620	7,635	7,650	7,665	7,680	7,695	7,710	7,725	7,740	7,755	7,770	7,785	7,800	7,815	7,830	7,845	7,860	7,875	7,890	7,905	7,920	7,935	7,950	7,965	7,980	7,995	8,010	8,025	8,040	8,055	8,070	8,085	8,100	8,115	8,130	8,145	8,160	8,175	8,190	8,205	8,220	8,235	8,250	8,265	8,280	8,295	8,310	8,325	8,340	8,355	8,370	8,385	8,400	8,415	8,430	8,445	8,460	8,475	8,490	8,505	8,520	8,535	8,550	8,565	8,580	8,595	8,610	8,625	8,640	8,655	8,670	8,685	8,700	8,715	8,730	8,745	8,760	8,775	8,790	8,805	8,820	8,835	8,850	8,865	8,880	8,895	8,910	8,925	8,940	8,955	8,970	8,985	9,000	9,015	9,030	9,045	9,060	9,075	9,090	9,105	9,120	9,135	9,150	9,165	9,180	9,195	9,210	9,225	9,240	9,255	9,270	9,285	9,300	9,315	9,330	9,345	9,360	9,375	9,390	9,405	9,420	9,435	9,450	9,465	9,480	9,495	9,510	9,525	9,540	9,555	9,570	9,585	9,600	9,615	9,630	9,645	9,660	9,675	9,690	9,705	9,720	9,735	9,750	9,765	9,780	9,795	9,810	9,825	9,840	9,855	9,870	9,885	9,900	9,915	9,930	9,945	9,960	9,975	9,990	10,005	10,020	10,035	10,050	10,065	10,080	10,095	10,110	10,125	10,140	10,155	10,170	10,185	10,200	10,215	10,230	10,245	10,260	10,275	10,290	10,305	10,320	10,335	10,350	10,365	10,380	10,395	10,410	10,425	10,440	10,455	10,470	10,485	10,500	10,515	10,530	10,545	10,560	10,575	10,590	10,605	10,620	10,635	10,650	10,665	10,680	10,695	10,710	10,725	10,740	10,755	10,770	10,785	10,800	10,815	10,830	10,845	10,860	10,875	10,890	10,905	10,920	10,935	10,950	10,965	10,980	10,995	11,010	11,025	11,040	11,055	11,070	11,085	11,100	11,115	11,130	11,145	11,160	11,175	11,190	11,205	11,220	11,235	11,250	11,265	11,280	11,295	11,310	11,325	11,340	11,355	11,370	11,385	11,400	11,415	11,430	11,445	11,460	11,475	11,490	11,505	11,520	11,535	11,550	11,565	11,580	11,595	11,610	11,625	11,640	11,655	11,670	11,685	11,700	11,715	11,730	11,745	11,760	11,775	11,790	11,805	11,820	11,835	11,850	11,865	11,880	11,895	11,910	11,925	11,940	11,955	11,970	11,985	12,000	12,015	12,030	12,045	12,060	12,075	12,090	12,105	12,120	12,135	12,150	12,165	12,180	12,195	12,210	12,225	12,240	12,255	12,270	12,285	12,300	12,315	12,330	12,345	12,360	12,375	12,390	12,405	12,420	12,435	12,450	12,465	12,480	12,495	12,510	12,525	12,540	12,555	12,570	12,585	12,600	12,615	12,630	12,645	12,660	12,675	12,690	12,705	12,720	12,735	12,750	12,765	12,780	12,795	12,810	12,825	12,840	12,855	12,870	12,885	12,900	12,915	12,930	12,945	12,960	12,975	12,990	13,005	13,020	13,035	13,050	13,065	13,080	13,095	13,110	13,125	13,140	13,155	13,170	13,185	13,200	13,215	13,230	13,245	13,260	13,275	13,290	13,305	13,320	13,335	13,350	13,365	13,380	13,395	13,410	13,425	13,440	13,455	13,470	13,485	13,500	13,515	13,530	13,545	13,560	13,575	13,590	13,605	13,620	13,635	13,650	13,665	13,680	13,695	13,710	13,725	13,740	13,755	13,770	13,785	13,800	13,815	13,830	13,845	13,860	13,875	13,890	13,905	13,920	13,935	13,950	13,965	13,980	13,995	14,010	14,025	14,040	14,055	14,070	14,085	14,100	14,115	14,130	14,145	14,160	14,175	14,190	14,205	14,220	14,235	14,250	14,265	14,280	14,295	14,310	14,325	14,340	14,355	14,370	14,385	14,400	14,415	14,430	14,445	14,460	14,475	14,490	14,505	14,520	14,535	14,550	14,565	14,580	14,595	14,610	14,625	14,640	14,655	14,670	14,685	14,700	14,715	14,730	14,745	14,760	14,775	14,790	14,805	14,820	14,835	14,850	14,865	14,880	14,895	14,910	14,925	14,940	14,955	14,970	14,985	15,000	15,015	15,030	15,045	15,060	15,075	15,090	15,105	15,120	15,135	15,150	15,165	15,180	15,195	15,210	15,225	15,240	15,255	15,270	15,285	15,300	15,315	15,330	15,345	15,360	15,375	15,390	15,405	15,420	15,435	15,450	15,465	15,480	15,495	15,510	15,525	15,540	15,555	15,570	15,585	15,600	15,615	15,630	15,645	15,660	15,675	15,690	15,705	15,720	15,735	15,750	15,765	15,780	15,795	15,810	15,825	15,840	15,855	15,870	15,885	15,900	15,915	15,930	15,945	15,960	15,975	15,990	16,005	16,020	16,035	16,050	16,065	16,080	16,095	16,110	16,125	16,140	16,155	16,170	16,185	16,200	16,215	16,230	16,245	16,260	16,275	16,290	16,305	16,320	16,335	16,350	16,365	16,380	16,395	16,410	16,425	16,440	16,455	16,470	16,485	16,500	16,515	16,530	16,545	16,560	16,575	16,590	16,605	16,620	16,635	16,650	16,665	16,680	16,695	16,710	16,725	16,740	16,755	16,770	16,785	16,800	16,815	16,830	16,845	16,860	16,875	16,890	16,905	16,920	16,935	16,950	16,965	16,980	16,995	17,010	17,025	17,040	17,055	17,070	17,085	17,100	17,115	17,130	17,145	17,160	17,175	17,190	17,205	17,220	17,235	17,250	17,265	17,280	17,2

REVISED 10/17/14

OCS Student Projections (1)(4)

School Year	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
Actual	3,076	2,863	2,901	3,116	3,452	3,843	3,553	3,814	3,974	3,794	3,654	3,814	3,975	4,052	4,052
Teacher	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
CC Planning	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
5 Year Growth	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
Capacity - 100% Level of Service	3,076	3,076	3,076	3,076	3,076	3,076	3,076	3,076	3,076	3,076	3,076	3,076	3,076	3,076	3,076
Capacity - 100% Level of Service, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
100% Level of Service, Actual and Projected, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Number of Students, Actual and Projected, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Average % Level of Service	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Annual Student Growth Rate (1)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Indicates when district surpasses Schools AFFO recommended Level of Service

Updated Note: The 2012 recommendation of school collaboration with CCPS and approved by OCS in 2009. Grades K-3 have not reduced from 1.23 to 1.21 with opening of OCS Elementary 1-10 Years Center as a result of prior agreements under the current state law.

Indicates when district surpasses Schools AFFO recommended Level of Service

The Trustee Model provides for the "Linear Method" of projections for each CHCCS and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCCS.

Annual growth rate calculated using total membership for years 2009-10 through 2017-18. In accordance with 2009 School Collaboration Work Group direction, effective the 2009-2010 school year with the opening of CHCCS Elementary #10, K-3 classes are 1.21 as directed by past State legislative action.

OCS Student Projections (1)

School Year	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
Actual	1,534	1,527	1,531	1,520	1,520	1,520	1,520	1,520	1,520	1,520	1,520	1,520	1,520	1,520	1,520
Teacher	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
CC Planning	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
5 Year Growth	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
Capacity - 100% Level of Service	1,534	1,534	1,534	1,534	1,534	1,534	1,534	1,534	1,534	1,534	1,534	1,534	1,534	1,534	1,534
Capacity - 100% Level of Service, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
100% Level of Service, Actual and Projected, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Number of Students, Actual and Projected, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Average % Level of Service	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Annual Student Growth Rate (1)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Indicates when district surpasses Schools AFFO recommended Level of Service

The Trustee Model provides for the "Linear Method" of projections for each CHCCS and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCCS.

Annual growth rate calculated using total membership for years 2009-10 through 2017-18. In accordance with 2009 School Collaboration Work Group direction, effective the 2009-2010 school year with the opening of CHCCS Elementary #10, K-3 classes are 1.21 as directed by past State legislative action.

OCS Student Projections (1)

School Year	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
Actual	1,572	1,753	1,833	1,937	2,057	2,134	2,164	2,222	2,293	2,315	2,447	2,535	2,633	2,733	2,833
Teacher	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
CC Planning	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
5 Year Growth	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
Capacity - 100% Level of Service	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572
Capacity - 100% Level of Service, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
100% Level of Service, Actual and Projected, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Number of Students, Actual and Projected, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Average % Level of Service	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Annual Student Growth Rate (1)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Indicates when district surpasses Schools AFFO recommended Level of Service

The Trustee Model provides for the "Linear Method" of projections for each CHCCS and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCCS.

Annual growth rate calculated using total membership for years 2009-10 through 2017-18. In accordance with 2009 School Collaboration Work Group direction, effective the 2009-2010 school year with the opening of CHCCS Elementary #10, K-3 classes are 1.21 as directed by past State legislative action.

OCS Student Projections (1)

School Year	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
Actual	1,572	1,753	1,833	1,937	2,057	2,134	2,164	2,222	2,293	2,315	2,447	2,535	2,633	2,733	2,833
Teacher	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
CC Planning	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
5 Year Growth	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
Capacity - 100% Level of Service	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572
Capacity - 100% Level of Service, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
100% Level of Service, Actual and Projected, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Number of Students, Actual and Projected, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Average % Level of Service	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Annual Student Growth Rate (1)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Indicates when district surpasses Schools AFFO recommended Level of Service

The Trustee Model provides for the "Linear Method" of projections for each CHCCS and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCCS.

Annual growth rate calculated using total membership for years 2009-10 through 2017-18. In accordance with 2009 School Collaboration Work Group direction, effective the 2009-2010 school year with the opening of CHCCS Elementary #10, K-3 classes are 1.21 as directed by past State legislative action.

OCS Student Projections (1)

School Year	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
Actual	1,572	1,753	1,833	1,937	2,057	2,134	2,164	2,222	2,293	2,315	2,447	2,535	2,633	2,733	2,833
Teacher	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
CC Planning	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
5 Year Growth	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
Capacity - 100% Level of Service	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572
Capacity - 100% Level of Service, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
100% Level of Service, Actual and Projected, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Number of Students, Actual and Projected, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Average % Level of Service	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Annual Student Growth Rate (1)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Indicates when district surpasses Schools AFFO recommended Level of Service

The Trustee Model provides for the "Linear Method" of projections for each CHCCS and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCCS.

Annual growth rate calculated using total membership for years 2009-10 through 2017-18. In accordance with 2009 School Collaboration Work Group direction, effective the 2009-2010 school year with the opening of CHCCS Elementary #10, K-3 classes are 1.21 as directed by past State legislative action.

OCS Student Projections (1)

School Year	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
Actual	1,572	1,753	1,833	1,937	2,057	2,134	2,164	2,222	2,293	2,315	2,447	2,535	2,633	2,733	2,833
Teacher	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
CC Planning	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
5 Year Growth	157	157	157	157	157	157	157	157	157	157	157	157	157	157	157
Capacity - 100% Level of Service	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572	1,572
Capacity - 100% Level of Service, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
100% Level of Service, Actual and Projected, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Number of Students, Actual and Projected, Over (Under) 100% LOS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Average % Level of Service	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Annual Student Growth Rate (1)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

REVISED 12/1/2014

CHCCS Student Projections (1) (4)

School Year	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	
Actual	2,815	2,863	2,942	3,030	3,117	3,204	3,292	3,380	3,468	3,556	3,644	3,732	3,820	3,908	4,000	4,092	4,184	4,276	4,368	4,460	4,552	4,644	4,736	4,828	
10 Year Growth																									
3 Year Growth																									
Average Annual Change (Increase) in Actual & Projected Membership	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	
Capacity - 100% Level of Service (LOS)	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	
Number of Students, Actual and Projected, Over (Under) 100% LOS	142	172	368	270	186	102	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	
100% Level of Service	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	
Number of Students, Actual and Projected, Over (Under) 100% LOS	693	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	
Actual - % Level of Service	103.2%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	
Annual Student Growth Rate (1)	0.85%	1.72%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	

Indicates when district surpasses Schools APFO recommended Level of Service

Indicates when district surpasses Schools APFO recommended Level of Service

It is important to note as it reflects the November 15, 2012 date of membership as outlined by the Schools Adequate Public Facilities Ordinance. It does not include CHCCS students attending the Hospital School.

The Trencher Model provides for the "Linear Method" of Projections for both CHCCS and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCCS.

Annual growth rate calculated using actual membership for years 2000-01 through 2012-13 and average membership for years 2013-14 through 2022-23.

CHCCS data for grades K-5 is 12th the actual year 2010 through 2011-12. In accordance with 2008 School Collaboration Joint Group Decision, effective the 2008-2009 school year with the approval of CHCCS Elementary #1, K-5 classes sizes are 1:21 as directed by past State legislative action.

CHCCS Student Projections (1)

School Year	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	
Actual	2,909	2,960	3,011	3,062	3,113	3,164	3,215	3,266	3,317	3,368	3,419	3,470	3,521	3,572	3,623	3,674	3,725	3,776	3,827	3,878	3,929	3,980	4,031	4,082	
10 Year Growth																									
3 Year Growth																									
Average Annual Change (Increase) in Actual & Projected Membership	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	
Capacity - 100% Level of Service (LOS)	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	
Number of Students, Actual and Projected, Over (Under) 100% LOS	1,393	1,342	1,291	1,240	1,189	1,138	1,087	1,036	985	934	883	832	781	730	679	628	577	526	475	424	373	322	271	220	
100% Level of Service	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	2,909	
Number of Students, Actual and Projected, Over (Under) 100% LOS	790	689	689	689	689	689	689	689	689	689	689	689	689	689	689	689	689	689	689	689	689	689	689	689	
Actual - % Level of Service	103.2%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	
Annual Student Growth Rate (1)	0.85%	1.72%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	

Indicates when district surpasses Schools APFO recommended Level of Service

Indicates when district surpasses Schools APFO recommended Level of Service

It is important to note as it reflects the November 15, 2012 date of membership as outlined by the Schools Adequate Public Facilities Ordinance. It does not include CHCCS students attending the Hospital School.

The Trencher Model provides for the "Linear Method" of Projections for both CHCCS and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCCS.

Annual growth rate calculated using actual membership for years 2000-01 through 2012-13 and average membership for years 2013-14 through 2022-23.

CHCCS Student Projections (1)

School Year	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	
Actual	2,815	2,863	2,942	3,030	3,117	3,204	3,292	3,380	3,468	3,556	3,644	3,732	3,820	3,908	4,000	4,092	4,184	4,276	4,368	4,460	4,552	4,644	4,736	4,828	
10 Year Growth																									
3 Year Growth																									
Average Annual Change (Increase) in Actual & Projected Membership	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	
Capacity - 100% Level of Service (LOS)	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	4,302	
Number of Students, Actual and Projected, Over (Under) 100% LOS	142	172	368	270	186	102	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	16	
100% Level of Service	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	3,239	
Number of Students, Actual and Projected, Over (Under) 100% LOS	693	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	674	
Actual - % Level of Service	103.2%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	104.1%	
Annual Student Growth Rate (1)	0.85%	1.72%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	

Indicates when district surpasses Schools APFO recommended Level of Service

Indicates when district surpasses Schools APFO recommended Level of Service

It is important to note as it reflects the November 15, 2012 date of membership as outlined by the Schools Adequate Public Facilities Ordinance. It does not include CHCCS students attending the Hospital School.

The Trencher Model provides for the "Linear Method" of Projections for both CHCCS and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCCS.

Annual growth rate calculated using actual membership for years 2000-01 through 2012-13 and average membership for years 2013-14 through 2022-23.

The Trencher model uses 14 years of historical data, but due to space constraints only 10 years of historical data are included in the above tables.

D. Student Membership Growth Rate

1. **Responsible Entity for Suggesting Change** – The updating of this section will be conducted by the Planning Directors, School Representatives, and 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 anticipated growth rates over the next 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.

- Analysis of Existing Conditions**
The membership figures and percentage growth on the attachments show continued growth at each school level within the system.

Projected Average Annual Growth Rate over next ten years:

Projected Average Annual Growth Rate over next ten years:

Year Projection Made:	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014
Elementary	1.72%	1.44%	1.59%	1.18%	1.44%
Middle	1.93%	1.67%	1.94%	1.59%	1.58%
High	1.8%	1.57%	1.73%	1.60%	1.27%

Year Projection Made:	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014
Elementary	1.34%	1.57%	1.6%	1.31%	1.30%
Middle	1.53%	1.84%	2.01%	1.64%	1.42%
High	1.38%	1.59%	1.61%	1.43%	1.35%

5. Recommendation - Use statistics as noted.

Recommendation - Use statistics as noted

2012-2013

Orange County Student Projections

Elementary

School Year	2012-2013 (actual)	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-23
Membership	3,403	3,433	3,479	3,574	3,622	3,654	3,698	3,742	3,786	3,830	3,875
Average % Increase		0.88%	1.35%	2.72%	1.34%	0.88%	1.21%	1.19%	1.18%	1.17%	1.16%

Middle

School Year	2012-2013 (actual)	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-23
Membership	1,684	1,733	1,772	1,777	1,785	1,824	1,903	1,930	1,939	1,959	1,979
Average % Increase		2.92%	2.22%	0.30%	0.48%	2.18%	4.32%	1.41%	0.47%	1.04%	1.02%

High School

School Year	2012-2013 (actual)	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-23
Membership	2,315	2,355	2,366	2,359	2,429	2,472	2,460	2,520	2,555	2,591	2,667
Average % Increase		1.71%	0.48%	-0.29%	2.97%	1.77%	-0.51%	2.45%	1.39%	1.41%	2.93%

Chapel Hill/Carrboro Student Projections

Elementary

School Year	2012-2013 (actual)	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-23
Membership	5,543	5,612	5,676	5,764	5,837	5,875	5,945	6,014	6,084	6,160	6,236
Average % Increase		1.25%	1.15%	1.55%	1.26%	0.65%	1.18%	1.17%	1.16%	1.24%	1.23%

Middle

School Year	2012-2013 (actual)	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-23
Membership	2,785	2,862	2,934	2,972	3,004	3,072	3,133	3,179	3,188	3,225	3,261
Average % Increase		2.75%	2.53%	1.30%	1.07%	2.26%	2.00%	1.46%	0.28%	1.15%	1.14%

High School

School Year	2012-2013 (actual)	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-23
Membership	3,796	3,828	3,866	3,910	4,016	4,108	4,167	4,235	4,324	4,374	4,447
Average % Increase		0.84%	0.98%	1.15%	2.72%	2.28%	1.43%	1.63%	2.09%	1.17%	1.67%

2013-2014

Orange County Student Projections

Elementary												
School Year	2013-2014 (actual)	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-23	2023-24	
Membership	3,433	3,472	3,555	3,597	3,627	3,668	3,716	3,764	3,812	3,861	3,906	
Average % Increase		1.14%	2.39%	1.18%	0.84%	1.13%	1.30%	1.29%	1.28%	1.28%	1.17%	

Middle												
School Year	2013-2014 (actual)	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-23	2023-24	
Membership	1,747	1,789	1,805	1,824	1,862	1,933	1,951	1,953	1,967	1,987	2,010	
Average % Increase		2.38%	0.94%	1.03%	2.07%	3.85%	0.90%	0.12%	0.71%	1.04%	1.12%	

High School												
School Year	2013-2014 (actual)	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-23	2023-24	
Membership	2,421	2,406	2,411	2,468	2,533	2,534	2,600	2,642	2,678	2,742	2,767	
Average % Increase		-0.61%	0.18%	2.40%	2.63%	0.03%	2.59%	1.62%	1.39%	2.36%	0.93%	

Chapel Hill/Carrboro Student Projections

Elementary												
School Year	2013-2014 (actual)	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-23	2023-24	
Membership	5,554	5,635	5,748	5,845	5,927	6,021	6,090	6,166	6,241	6,323	6,405	
Average % Increase		1.47%	2.00%	1.69%	1.41%	1.57%	1.15%	1.24%	1.23%	1.31%	1.30%	

Middle												
School Year	2013-2014 (actual)	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-23	2023-24	
Membership	2,858	2,925	2,947	2,962	2,999	3,063	3,134	3,190	3,257	3,299	3,342	
Average % Increase		2.35%	0.76%	0.50%	1.24%	2.13%	2.32%	1.78%	2.11%	1.30%	1.30%	

High School												
School Year	2013-2014 (actual)	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-23	2023-24	
Membership	3,764	3,805	3,825	3,893	3,982	4,011	4,050	4,086	4,112	4,199	4,268	
Average % Increase		1.08%	0.54%	1.78%	2.27%	0.75%	0.96%	0.88%	0.65%	2.10%	1.65%	

E. Student / Housing Generation Rate

1. **Responsible Entity for Suggesting Change** – The updating of this section will be conducted by Planning Directors, School Representatives, and 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:**

<p>Chapel Hill Carrboro School District</p> <p>See Attachment II.E.1</p>	<p>Orange County School District</p> <p>See Attachment II.E.1</p>
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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 the 2010-11 school year with the November 15, 2010 CAPS system update. The current standards are shown in Attachment II.E.1. Both Orange County Schools and Chapel Hill-Carrboro City Schools have recognized a larger increase in students generated from developments in both districts, particularly the multi-family housing. The SAPFOTAC discussed the increased number of students generated in both districts and proposed multi-family projects that may continue to have an effect on student membership numbers. While this may be a short term trend caused by the current economic climate or other factors, the SAPFOTAC recommends further evaluation of the adopted Student Generation Rates and the impacts different types of housing may have on student membership rates. Orange County Planning staff has contacted the consultant used to do this type of work in the past to obtain a cost estimate. It is expected that a new study to update only student generation rates would cost

Section II

between \$12,000 to \$20,000 with the lower end of the range being more probable, given knowledge of the types of data Orange County has ready access to.

Also, it should be noted 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***

The SAPFOTAC does not recommend a change at this time. However, the SAPFOTAC continues to recommend further evaluation of the Student Generation Rates to determine whether a change is warranted. The last impact fee level study (which includes the calculation of student generation rates) was conducted in 2007 so it may be time to initiate another study to ensure up-to-date data is used for both SAPFO purposes and impact fee purposes. Alternatively, a study to analyze only student generation rates, separate from any study regarding school impact fees, can be completed. The cost for such a study is estimated at between \$12,000 to \$20,000.

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

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)

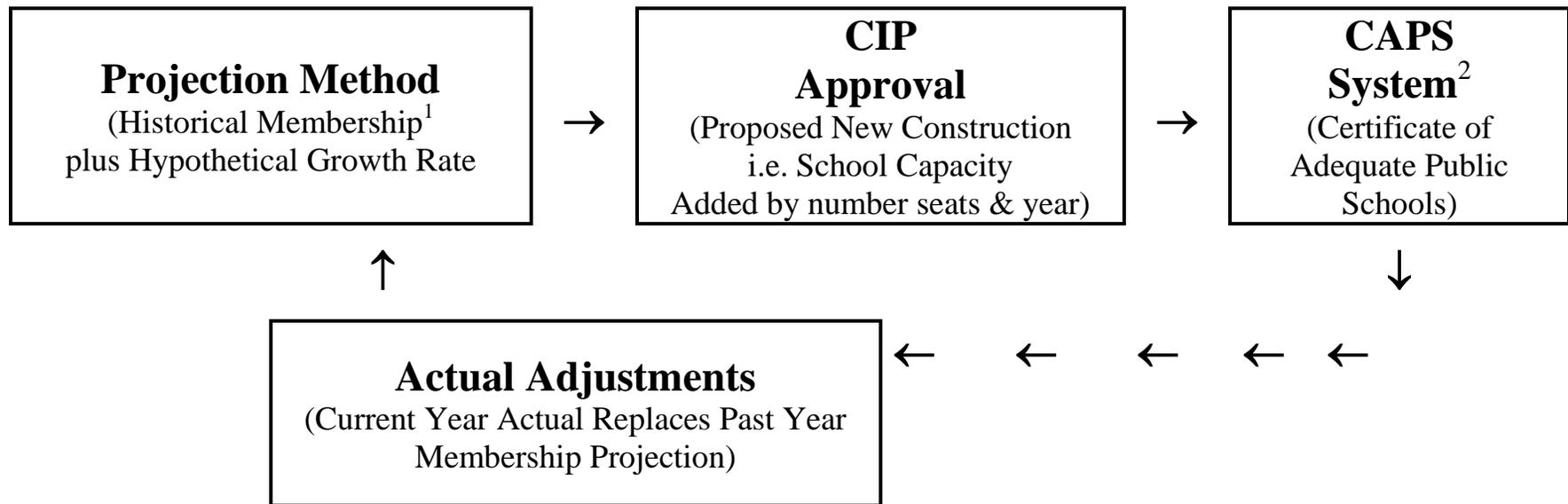
Timeframe: In November of each year, Student Membership and Building Capacity is transmitted from the school districts to the Orange County Board of Commissioners for consideration and approval and used in the following years CIP (e.g. November 15, 2013 membership numbers used to develop a CIP to be considered for adoption in June 2014).

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.

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 require that CAPS be issued prior to approving development activities. However, residential development within the Orange County portion of Mebane has increased dramatically prior to 2009, but has slowed considerably due to the current economic climate. Currently, there are approximately 1,000 approved undeveloped residential lots in the portion of Mebane that lies within Orange County. 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

Section III

District. Although the SAPFO system is not formally regulated in Mebane, staff monitors development activity and when students enter the school system their enrollment is calculated and used in future school projection needs.

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 2014 - 2024)

November 2013 – June 2014 (using 2014 SAPFOTAC Report)

Schools APFO CAPS Process 2 (for Schools APFO System 2014– 2015)

November 2013 - November 2014

School Adequate Public Facilities Ordinance

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

2014 CAPS system is effective November 15, 2013 through November 14, 2014.

The system is updated with new membership, CIP capacity changes, and any other BOCC/School District joint action approved capacity prior to November 15, 2013. 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, 2013 .

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

OCS Student Projections ⁽¹⁾(4)

Elementary

School Year	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
Actual	3,078	2,893	2,901	2,945	3,016	3,006	3,072	3,158	3,165	3,211	3,285	3,348	3,403	3,433										
Tischler ⁽²⁾															3,493	3,553	3,614	3,674	3,734	3,794	3,854	3,914	3,975	4,035
OC Planning															3,492	3,559	3,626	3,695	3,765	3,835	3,905	3,975	4,046	4,099
10 Year Growth															3,457	3,550	3,575	3,578	3,601	3,637	3,674	3,710	3,748	3,785
5 Year Growth															3,471	3,580	3,619	3,634	3,663	3,700	3,737	3,774	3,812	3,850
3 Year Growth															3,448	3,535	3,553	3,556	3,579	3,615	3,651	3,688	3,725	3,762
Average															3,472	3,555	3,597	3,627	3,668	3,716	3,764	3,812	3,861	3,906
Annual Change - Increase (Decrease) in Actual & Projected Membership		(185)	8	44	71	(10)	66	86	7	46	74	63	55	30	39	83	42	30	41	48	48	48	49	45
Capacity - 100% Level of Service	3,820	3,820	3,820	3,820	3,820	3,920	3,922	3,922	3,694	3,694	3,694	3,694	3,694	3,694	3,694	3,694	3,694	3,694	3,694	3,694	3,694	3,694	3,694	3,694
Number of Students, Actual and Projected, Over (Under) 100% LOS	(742)	(927)	(919)	(875)	(804)	(914)	(850)	(764)	(529)	(483)	(409)	(346)	(291)	(261)	(222)	(139)	(97)	(67)	(26)	22	70	118	167	212
105% Level of Service	4,011	4,011	4,011	4,011	4,011	4,116	4,118	4,118	3,879	3,879	3,879	3,879	3,879	3,879	3,879	3,879	3,879	3,879	3,879	3,879	3,879	3,879	3,879	3,879
Number of Students, Actual and Projected, Over (Under) 105% LOS	(933)	(1,118)	(1,110)	(1,066)	(995)	(1,110)	(1,046)	(960)	(714)	(668)	(594)	(531)	(476)	(446)	(406)	(323)	(281)	(251)	(210)	(163)	(114)	(66)	(18)	28
Actual - % Level of Service	80.6%	75.7%	75.9%	77.1%	79.0%	76.7%	78.3%	80.5%	85.7%	86.9%	88.9%	90.6%	92.1%	92.9%	94.0%	96.2%	97.4%	98.2%	99.3%	100.6%	101.9%	103.2%	104.5%	105.7%
Average - % Level of Service																								
Annual Student Growth Rate (3)		-6.01%	0.28%	1.52%	2.41%	-0.33%	2.20%	2.80%	0.22%	1.45%	2.30%	1.92%	1.64%	0.88%	1.14%	2.39%	1.18%	0.84%	1.13%	1.30%	1.29%	1.28%	1.28%	1.17%

additional 100 new seats @ Hillsborough Elementary

Important Note: Per 2005 recommendation of School Collaboration Work Group and approved by BOCC with approval of 2008-09 Membership & Capacity numbers and certification of 2009 SAPFOTAC report of May 5, 2009, Grades K-3 class size reduced from 1:23 to 1:21 with opening of CHCCS Elementary #10-Morris Grove (to allow for prior legislative action re: reduced class size)

⁽¹⁾ It is important to note that this reflects the November 15, 2013 date of membership as outlined in by the Schools Adequate Public Facilities Ordinance.
⁽²⁾ The Tischler Model provides for the "Linear Method" of projections for both CHCCS and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCCS.
⁽³⁾ Annual growth rate calculated using actual membership for years 2000-01 through 2013-14 and average membership for years 2014-15 through 2023-24
⁽⁴⁾ Class sizes for grades K-3 = 1:23 for school years 2000 through 2007-08. In accordance with 2005 School Collaboration Work Group direction, effective the 2008-2009 school year with the opening of CHCCS Elementary #10, K-3 class sizes are 1:21 as directed by past State legislative action.

OCS Student Projections ⁽¹⁾

Middle

School Year	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
Actual	1,504	1,527	1,631	1,671	1,593	1,590	1,580	1,637	1,601	1,665	1,698	1,704	1,684	1,747										
Tischler ⁽²⁾															1,778	1,808	1,839	1,869	1,900	1,931	1,961	1,992	2,023	2,053
OC Planning															1,777	1,823	1,869	1,917	1,957	1,995	2,009	2,023	2,045	
10 Year Growth															1,796	1,804	1,813	1,853	1,947	1,955	1,940	1,946	1,965	1,985
5 Year Growth															1,799	1,803	1,807	1,848	1,954	1,978	1,975	1,987	2,007	2,027
3 Year Growth															1,793	1,789	1,792	1,821	1,909	1,910	1,894	1,900	1,919	1,938
Average															1,789	1,805	1,824	1,862	1,933	1,951	1,953	1,967	1,987	2,010
Annual Change - Increase (Decrease) in Actual & Projected Membership		23	104	40	(78)	(3)	(10)	57	(36)	64	33	6	(20)	63	42	17	19	38	72	17	2	14	20	22
Capacity - 100% Level of Service	1,466	1,466	1,466	1,466	1,466	1,466	2,166	2,166	2,166	2,166	2,166	2,166	2,166	2,166	2,166	2,166	2,166	2,166	2,166	2,166	2,166	2,166	2,166	2,166
Number of Students, Actual and Projected, Over (Under) 100% LOS	38	61	165	205	127	124	(586)	(529)	(565)	(501)	(468)	(462)	(482)	(419)	(377)	(361)	(342)	(304)	(233)	(215)	(213)	(199)	(179)	(156)
107% Level of Service	1,569	1,569	1,569	1,569	1,569	2,318	2,318	2,318	2,318	2,318	2,318	2,318	2,318	2,318	2,318	2,318	2,318	2,318	2,318	2,318	2,318	2,318	2,318	2,318
Number of Students, Actual and Projected, Over (Under) 107% LOS	(65)	(42)	62	102	24	21	(738)	(681)	(717)	(653)	(620)	(614)	(634)	(571)	(529)	(512)	(494)	(456)	(384)	(367)	(365)	(351)	(330)	(308)
Actual - % Level of Service	102.6%	104.2%	111.3%	114.0%	108.7%	108.5%	72.9%	75.6%	73.9%	76.9%	78.4%	78.7%	77.7%	80.7%	82.6%	83.4%	84.2%	85.9%	89.3%	90.1%	90.2%	90.8%	91.8%	92.8%
Average - % Level of Service																								
Annual Student Growth Rate (3)		1.53%	6.81%	2.45%	-4.67%	-0.19%	-0.63%	3.61%	-2.20%	4.00%	1.98%	0.35%	-1.17%	3.74%	2.38%	0.94%	1.03%	2.07%	3.85%	0.90%	0.12%	0.71%	1.04%	1.12%

middle school #3 opens in fall 2006 with 700 additional seats

⁽¹⁾ It is important to note that this reflects the November 15, 2013 date of membership as outlined in by the Schools Adequate Public Facilities Ordinance.
⁽²⁾ The Tischler Model provides for the "Linear Method" of projections for both CHCCS and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCCS.
⁽³⁾ Annual growth rate calculated using actual membership for years 2000-01 through 2013-14 and average membership for years 2014-15 through 2023-24

OCS Student Projections ⁽¹⁾

High

School Year	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
Actual	1,672	1,753	1,828	1,887	2,057	2,124	2,184	2,201	2,242	2,217	2,222	2,283	2,315	2,421										
Tischler ⁽²⁾															2,463	2,506	2,548	2,591	2,633	2,676	2,718	2,760	2,803	2,845
OC Planning															2,434	2,459	2,484	2,534	2,576	2,618	2,652	2,685	2,718	2,760
10 Year Growth															2,404	2,358	2,401	2,471	2,443	2,529	2,581	2,616	2,688	2,698
5 Year Growth															2,436	2,418	2,461	2,523	2,499	2,583	2,631	2,678	2,774	2,802
3 Year Growth															2,294	2,312	2,448	2,548	2,519	2,592	2,627	2,653	2,726	2,731
Average															2,406	2,411	2,468	2,533	2,534	2,600	2,642	2,678	2,742	2,767
Annual Change - Increase (Decrease) in Actual & Projected Membership		81	75	59	170	67	60	17	41	(25)	5	61	32	106	(15)	4	58	65	1	66	42	37	63	25
Capacity - 100% Level of Service	1,518	1,518	2,518	2,518	2,518	2,518	2,533	2,533	2,558	2,558	2,558	2,439	2,439	2,439	2,439	2,439	2,439	2,439	2,439	2,439	2,439	2,439	2,439	2,439
Number of Students, Actual and Projected, Over (Under) 100% LOS	154	235	(690)	(631)	(461)	(394)	(349)	(332)	(316)	(341)	(336)	(275)	(124)	(18)	(33)	(28)	29	94	95	161	203	239	303	328
110% Level of Service	1,670	1,670	2,770	2,770	2,770	2,770	2,786	2,786	2,814	2,814	2,814	2,814	2,683	2,683	2,683	2,683	2,683	2,683	2,683	2,683	2,683	2,683	2,683	2,683
Number of Students, Actual and Projected, Over (Under) 110% LOS	2	83	(942)	(883)	(713)	(646)	(602)	(585)	(572)	(597)	(592)	(531)	(368)	(262)	(277)	(272)	(215)	(150)	(149)	(83)	(41)	(4)	59	84
Actual - % Level of Service	110.1%	115.5%	72.6%	74.9%	81.7%	84.4%	86.2%	86.9%	87.6%	86.7%	86.9%	89.2%	94.9%	99.3%	98.7%	98.8%	101.2%	103.9%	103.9%	106.6%	108.3%	109.8%	112.4%	113.5%
Average - % Level of Service																								
Annual Student Growth Rate (3)		4.84%	4.28%	3.23%	9.01%	3.26%	2.82%	0.78%	1.86%	-1.12%	0.23%	2.75%	1.40%	4.58%	-0.61%	0.18%	2.40%	2.63%	0.03%	2.59%	1.62%	1.39%	2.36%	0.93%

cedar ridge high opens with 1,000 seats in fall 2002

Partnership Academy Alternative School capacity added

Orange High capacity decreased, per DPI study

Partnership Academy Alternative School relocated - capacity added

**ORANGE COUNTY
BOARD OF COMMISSIONERS**

ACTION AGENDA ITEM ABSTRACT

Meeting Date: March 18, 2014

**Action Agenda
Item No.** 6-e

SUBJECT: Durham-Chapel Hill-Carrboro Metropolitan Planning Organization
Member Agencies Memorandum of Understanding Revisions

DEPARTMENT: Planning and Inspections

PUBLIC HEARING: (Y/N)

No

ATTACHMENT(S):

1. Flowchart of the MOU Revision Process
2. Updated MOU with Changes Noted
3. Existing MOU (Executed 1994)

INFORMATION CONTACT:

Bret Martin, Transportation Planner, 245-2582
Tom Altieri, Comprehensive Planning Supervisor, 245-2579
Craig Benedict, Planning Director, 245-2592

PURPOSE: To approve and authorize the Chair to sign a final draft of an updated/revised Memorandum of Understanding (MOU) among the member agencies of the Durham-Chapel Hill-Carrboro Metropolitan Planning Organization (DCHC MPO).

BACKGROUND: The DCHC MPO is a transportation planning agency charged with fulfilling federally mandated metropolitan planning requirements influencing the use of federal transportation funding within the Durham Urbanized Area (UZA) and the area beyond the UZA boundary expected to become urbanized within 20 years. The MPO is a partnership of the member governments within the Durham UZA/MPO planning area and the North Carolina Department of Transportation in cooperation with the United States Department of Transportation. Membership within the MPO is established through an MOU between its local government member organizations/jurisdictions that was last executed in 1994.

The MPO has developed an updated/revised member agency MOU reflecting changes in federal and state legislation and regulations, the MPO's function and structure, and its and its member government responsibilities. In concert with the MOU update/revision process illustrated in Attachment 1, the BOCC first reviewed a draft updated MOU at its September 5, 2013 meeting, provided comments on the draft revisions, and submitted these comments to the MPO along with comments generated by other MPO member governments. These comments were reviewed by the MPO's Technical Coordinating Committee (TCC) and governing board, and the MPO subsequently made changes to the draft MOU based on these comments.

At its January 23, 2014 meeting, the BOCC reviewed and considered the updated/revised MOU with the changes having been incorporated. However, the BOCC did not approve the MOU and asked that clarifying language regarding what constitutes a quorum of the MPO Board as well as other minor edits be incorporated into the MOU. These comments were echoed by some other member governments and were subsequently incorporated into a new draft of the MOU to be redistributed for adoption by the member local governments. The incorporation of these

ARTICLE 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.

Art. IV PERMITS AND FINAL PLAT APPROVAL

(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 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:

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- 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 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

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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;

(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

Art. IV PERMITS AND FINAL PLAT APPROVAL

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 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.

**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 B. Williamson
Town Clerk



TOWN OF CHAPEL HILL

SEAL

By: [Signature]
Mayor

Attest:

[Signature]
Town Clerk



THE CHAPEL HILL-CARRBORO 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



TOWN OF CARRBORO

NORTH CAROLINA

TRANSMITTAL

PLANNING DEPARTMENT

DELIVERED VIA: HAND MAIL FAX EMAIL

To: Patricia J. McGuire, Planning Director

From: Marty Roupe, Development Review Administrator

Date: April 11, 2014

Subject: Status of CAPS Issuance for Residential Projects

Projects (Permit and Approval Date)	Density Bonus Units	CAPS Issued (Applies to projects after 6-24-03)
Ballentine (CUP 6/26/07)	18	3-6-08
Claremont AIS (CUP 11/22/05)	12	12-16-05
Claremont II(Claremont II(CUP 3/17/09)	16 and 0	7-23-09 and 3-20-12
Legends at Lake Hogan Farms (CUP 8/22/06)	10	11/22/06
Litchfield AIS (CUP 6/22/10)	6	7/22/10
Lloyd Harbor AIS (CUP 6/26/07)	2	5/16/10
The Butler (CUP 8/26/08)	5	8/11/11
Veridia	0	No
Shelton Station	57	12/6/12
Carr Street Apartments	2	No