



Town of Carrboro

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

Meeting Agenda Board of Aldermen



Tuesday, April 9, 2019

7:00 PM

Board Chambers - Room 110

7:00-7:10

A. POETRY READING, RESOLUTIONS, PROCLAMATIONS, AND ACKNOWLEDGEMENTS

1. [19-135](#) Sexual Assault Awareness Month Proclamation
2. **19-138** Frederick Lewis Battle Day - Proclamation

7:10-7:15

B. ANNOUNCEMENT OF UPCOMING MEETINGS

7:15-7:20

C. REQUESTS FROM VISITORS AND SPEAKERS FROM THE FLOOR

7:20-7:25

D. CONSENT AGENDA

1. [19-134](#) Approval of March 26, 2019 Meeting Minutes
2. [19-129](#) Request for a Minor Modification to the CUP for 300 East Main Street for Roof Canopy
PURPOSE: The purpose of this item is for the Board of Aldermen to consider approving a Minor Modification request for the 300 East Main CUP to allow for the addition of a roof canopy above a portion of the outdoor seating at Amante Pizza.
Attachments: [Attachment A - Resolution Approving Minor Modification Request](#)
[Attachment B - Excerpt from June 25, 2013 Board of Aldermen Minutes](#)
[Attachment C - Applicant's Letter](#)
3. [19-130](#) Economic Development Report for the Month of April
PURPOSE: The purpose of this agenda item is to update the Board on economic development activity within the Town.
Attachments: [April Economic Development Report](#)

E. PUBLIC HEARING**7:25-7:55**

1. [19-131](#) Public Hearing for Jones Creek Greenway (C-5181) 15% Design
PURPOSE: The purpose of this agenda item is to provide an update on the status of the Jones Creek Greenway at 15% design and to receive comments from the Board and members of the public.

Attachments: [Attachment A - Resolution 15%](#)
[Attachment B - JonesCreek rdy psh 04](#)
[Attachment C - Jones Creek map](#)

F. OTHER MATTERS**7:55-8:10**

1. [19-133](#) Review of Request for Permission to Conduct Concrete Pours Outside of Noise Ordinance Provisions
PURPOSE: The Board of Aldermen is asked to review and discuss a request from Inter Faith Council regarding the need to conduct nighttime concrete pours associated with construction of a new building at 110 West Main Street.

Attachments: [Attachment A - Noise Ordinance](#)
[Attachment B - Excerpt from January 15, 2019 Meeting Minutes](#)
[Attachment C - Letter from IFC to Town Manager](#)

8:10-8:55

1. [19-132](#) Review of Preliminary Draft Ordinance and Master Plan to Rezone Property at Old NC 86 and Eubanks Road to a Site Specific, Flexible Zoning (FLX) District
PURPOSE: The purpose of this item to provide the Board with an opportunity to review in more detail the preliminary draft ordinance and graphic illustrations prepared as part of the application to rezone property to a FLX district, and to consider the first round of advisory board comments on the draft ordinance provisions.

Attachments: [Attachment A - Resolution](#)
[Attachment B - Excerpt from February 26 2019 Board of Aldernern Meeting Minutes](#)
[Attachment C - Advisory Board Comments](#)

8:55-9:15

1. [19-128](#) Review and Acceptance of the 2019 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 2019 report for review. The Board of Commissioners has requested comments from partner local governments by April 22nd. A resolution that accepts the report has been attached. The Board may choose to attach comments if desired.

Attachments: [Attachment A - Resolution](#)
[Attachment B - Letter and Executive Summary](#)
[Attachment C - Draft-SAPFOTAC-Report](#)
[Attachment D - LUO Sec 15-88-15-88.7 and MOU](#)
[Attachment E - Memo on CAPS](#)

G. MATTERS BY BOARD MEMBERS

H. CLOSED SESSION PURSUANT TO NCGS 143-318.11 (A) (3) - Attorney-Client



Town of Carrboro

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301 W. Main St.
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Agenda Item Abstract

File Number:19-135

Agenda Date: 4/9/2019

File Type:Agendas

In Control: Board of Aldermen

Version: 1

Sexual Assault Awareness Month Proclamation



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Agenda Item Abstract

File Number:19-134

Agenda Date: 4/9/2019

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Approval of March 26, 2019 Meeting Minutes



Town of Carrboro

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

Agenda Item Abstract

File Number:19-129

Agenda Date: 4/9/2019

File Type:Agendas

In Control: Board of Aldermen

Version: 1

TITLE:

Request for a Minor Modification to the CUP for 300 East Main Street for Roof Canopy

PURPOSE: The purpose of this item is for the Board of Aldermen to consider approving a Minor Modification request for the 300 East Main CUP to allow for the addition of a roof canopy above a portion of the outdoor seating at Amante Pizza.

DEPARTMENT: Planning

CONTACT INFORMATION: Marty Roupe, 918-7333 or mroupe@townofcarrboro.org
<<mailto:mroupe@townofcarrboro.org>>

INFORMATION: In June 2013 Main Street Partners requested and the Board of Aldermen approved a Minor Modification to the CUP allowing for small outdoor changes to occur on site without rising to the level of being considered a permit modification under LUO Section 15-64. More specifically, the resolution approved by the Board allows for changes and additions for the purpose of installing awnings above outdoor seating, creation of new outdoor seating areas, and similar changes. The resolution, however, limited such changes to a maximum size of 200 square feet (see Attachment B).

As explained in the applicant's letter (Attachment C), Amante Pizza desires to install such an awning by way of connecting to existing steel columns, which causes the overall size of the new feature to be approximately 350 square feet. For clarity, the letter includes a statement regarding up to 700 square feet, which is included in the previously approved resolution specifically for Hickory Tavern, but they are only requesting approval of a 350 square foot feature. Staff has considered the language included in the resolution, regarding additional changes in the future of up to 200 square feet, and determined that the requested change only involves a relatively small increase above what is authorized under the approved resolution and the reasoning for needing to exceed the previously approved size is logical, hence the item has been placed on consent agenda so that the Board may simply approve without discussion. If, however, the Board wishes to discuss or has concerns with what is proposed, the applicant will be present at the meeting to discuss.

FISCAL & STAFF IMPACT: No fiscal or staff impacts noted beyond preparation of the agenda item.

RECOMMENDATION: Town staff requests that the Board approve the attached resolution allowing for installation of a new roof canopy above a portion of the outdoor seating at Amante Pizza.

ATTACHMENT A

The following resolution was introduced by Aldermen _____ and duly seconded by Aldermen _____.

A RESOLUTION APPROVING A MINOR MODIFICATION TO THE 300 EAST MAIN CONDITIONAL USE PERMIT AUTHORIZING INSTALLATION OF A 350 SQUARE FOOT OUTDOOR PATIO COVER AT AMANTE PIZZA

WHEREAS, the Carrboro Board of Aldermen approved a Conditional Use Permit for 300 East Main; and

WHEREAS, Town Staff has determined that this request constitutes a Minor Modification to the Conditional Use Permit; and

WHEREAS, the applicant has met the criteria in the Town's Land Use Ordinance related to Minor Modifications.

NOW, THEREFORE BE IT RESOLVED that the Carrboro Board of Aldermen approve the Minor Modification authorizing installation of a 350 square foot patio cover in front of Amante Pizza

This the 9th day of April, 2019

NOW, THEREFORE BE IT RESOLVED that the Carrboro Board of Aldermen approve the Minor Modification request to allow for a reduction in size from five stories to three stories, along with the associated changes in the building's design.

This the 25th day of June, 2013

The motion carried by the following vote:

Aye: Alderman Gist, Alderman Haven-O'Donnell, Alderman Johnson, Alderman Lavelle and Alderman Seils

Nay: Alderman Slade

Excused: Mayor Chilton

REQUEST FOR A MINOR MODIFICATION TO THE CUP FOR 300 EAST MAIN RELATED TO ADDING A RESIDENTIAL USE CATEGORY AND OUTDOOR USES ON THE SITE

The purpose of this item was for the Board to consider adopting a resolution approving changes to the sidewalk / courtyard area of the 300 East Main project.

Marty Roupe, the Town's Zoning Administrator, made the staff presentation to the Board.

Laura Van Sant, representing Main Street Properties, discussed the application with the Board.

Kevin Benedict, representing Main Street Properties, also discussed the application with the Board. He stated that they could agree to the condition that 80% of the residential would be one bedroom or studio on the upper floors only.

MOTION WAS MADE BY ALDERMAN SLADE, SECONDED BY ALDERMAN SEILS TO APPROVE OF THE RESOLUTION, EXCEPT FOR THE RESIDENTIAL COMPONENT, AND FOR THE APPLICANT TO RETURN THE PROJECT, IN MORE DETAIL, TO THE BOARD AT A LATER TIME:

A RESOLUTION APPROVING A MINOR MODIFICATION TO THE 300 EAST MAIN CONDITIONAL USE PERMIT AUTHORIZING INSTALLATION OF AN OUTDOOR DINING COVER UP TO 700 SQUARE FEET IN SIZE, AND AFFIRMING THAT SMALL, NON-STRUCTURAL CHANGES MAY OCCUR WITHOUT ZONING STAFF OR BOARD OF ALDERMEN REVIEW

WHEREAS, the Carrboro Board of Aldermen approved a Conditional Use Permit for 300 East Main; and

WHEREAS, Town Staff has determined that this request constitutes a Minor Modification to the Conditional Use Permit; and

WHEREAS, the applicant has met the criteria in the Town's Land Use Ordinance related to Minor

Modifications.

NOW, THEREFORE BE IT RESOLVED that the Carrboro Board of Aldermen approve allow installation of an outdoor dining cover up to 700 square feet in size, and allowing small, non-structural changes to occur without zoning or Board of Aldermen review, subject to the following condition:

- That the applicant may install, remove, and otherwise change the location of non-structural elements of the outdoor portions of the site without necessitating review under LUO Section 15-64, so long as sidewalks and courtyards remain reasonably open and traversable. Such changes include but are not limited to small awnings, non-structural patio covers up to 200 square feet in size, and fencing, bollards, and similar devices intended to delineate outdoor dining areas. Structural additions and / or larger sized changes exceeding 200 square feet, as well as changes to the façade of a building, that significantly change the size of an opening, shall be reviewed by staff. Staff will determine, in accordance with LUO Section 15-64, whether such requests need to be reviewed by the Board as a Minor Modification.

This the 25th day of June, 2013

The motion carried by the following vote:

Aye: Mayor Chilton, Alderman Gist, Alderman Haven-O'Donnell, Alderman Johnson, Alderman Lavelle, Alderman Slade and Alderman Seils

DISCUSSION OF POSSIBLE CHANGES TO PARKING AND TOWING RULES

The purpose of this item was for the Board of Aldermen to receive information from Town staff regarding suggested changes to the Town Code related to the towing of vehicles from private property and limitations on parking in Town-owned parking lots.

Trish McGuire, the Town's Planning Director, made the staff presentation to the Board.

Nick Robinson, representing Carr Mill Mall Limited Partnership, read a prepared statement to the Board. That statement was presented to the Town Clerk for addition to the public record. He expressed a desire to work with the Board on a comprehensive parking plan.

Jaffey Barnes, representing Barnes Towing, spoke to the Board about his concerns related to towing. He expressed a desire to work with the Board on developing the towing rules and regulations.

Cindy McMahan, the owner of Elmo's, stated that she needs the Board's help with parking. She stated that as a tenant, she needs the parking spaces so people can get to her restaurant. She said that as a business owner in Carr Mill, that she feels forgotten by the Board of Aldermen.

MOTION WAS MADE BY ALDERMAN LAVELLE, SECONDED BY ALDERMAN SEILS FOR STAFF TO WORK WITH BARNES TOWING, AND OTHER TOWING COMPANIES, ON THE PROPOSED ORDINANCE CHANGES. THE REPORT SHALL BE RETURNED TO THE BOARD IN SEPTEMBER. VOTE: AFFIRMATIVE ALL

In response to a question about recent refunds related to vehicles that were towed from the Carr Mill lot, Brooke Barnes, the manager of Barnes Towing, stated that some of the towing fees were refunded to

March 20, 2019

Proposal for New Roof Canopy at Amante Pizza
Application for Minor Modification to Conditional Use Permit at 300 East Main Street

Mr. Marty Roupe
Development Review Administrator
Town Hall, 2nd Floor
301 W. Main St.
Carrboro, NC 27510

Hello Mr. Roupe,

Thank you for discussing the proposed canopy at Amante Pizza at Suite F, 300 East Main Street recently with me.

As you have made us aware, the proposed installation or change to nonstructural elements of the outdoor portions of the site at 300 East Main is addressed by a specific resolution or condition to 300 East Main's Conditional Use Permit. We propose a Minor Modification to the Conditional Use Permit in order to accommodate an additional amount of covered outdoor seating at the existing outdoor dining at this restaurant.

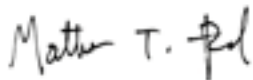
Moment Studio has prepared construction drawings for a new steel canopy at the existing outdoor seating area (attached for reference along with a proposed rendering.) Custom Carpentry Group submitted for a building permit based on these drawings, dated January 16, 2019.

The proposed steel canopy would have a footprint of 12'-8" x 27'-6". This is approximately 350 square feet of new coverage at the currently existing outdoor dining at this site. An additional amount of railing serves to separate the outdoor seating from the parking area. We do not propose covering the entirety of the outdoor seating there, in part to maintain a sense of openness and visual connection to the existing facade of the building. Additionally, the canopy's width is driven by the necessity to connect the new structure to the two existing steel columns that are directly inboard of the building facade. A new steel member will connect the two columns and provide a framework for the roof to connect in a structurally sound and safe manner to the existing building. In other words, the size of the canopy is derived in part from its constructability. Our client, Amante Pizza, and 300 East Main (Main Street Partners) are both in support of the project's design and we all think it will serve as an attractive and functional addition to the site. Leo Gaev Metalworks of Carrboro is being retained to construct the canopy. Their level of craft and local connection both serve to add to the project's appeal.

Additionally, we hold that the construction of this canopy will leave the sidewalk at the front of the building quite reasonably open and traversable. Reading through the resolution you provided us, my interpretation holds that "outdoor dining cover" of up to 700 square feet can be added to this site. We request that based on maintaining a reasonably open and traversable path at the front of the building, where the existing circulation exists, the proposed design is an attractive and functional improvement to this local business and development.

We look forward to the town's review of this project.

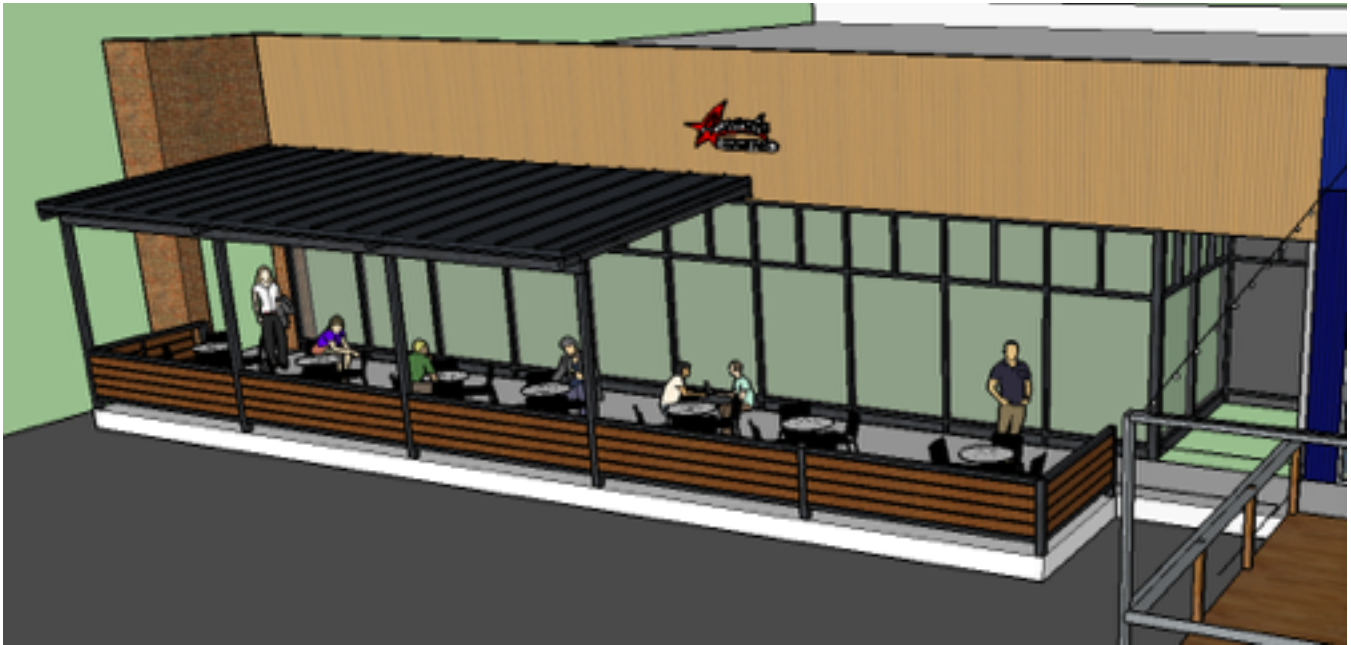
regards,



matthew ford, aia
MOMENT STUDIO, PLLC

March 20, 2019

Proposal for New Roof Canopy at Amante Pizza
Application for Minor Modification to Conditional Use Permit at 300 East Main Street



architect's rendering of proposed canopy

project:

EXTERIOR
IMPROVEMENTS

FOR

AMANTE
PIZZA

300
EAST MAIN STREET
SUITE G



CARRBORO,
NC
27510

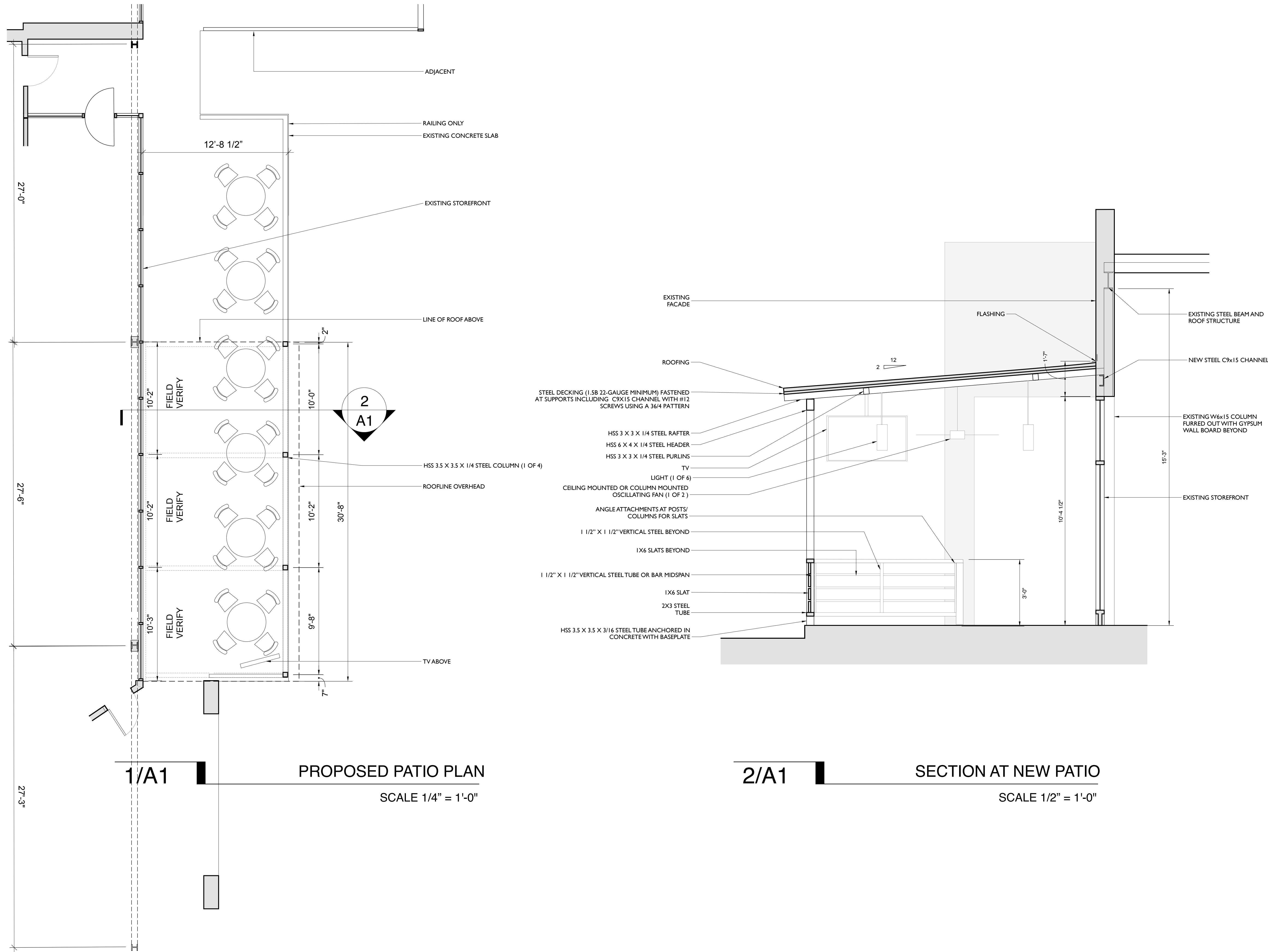
THESE DRAWINGS ARE INSTRUMENTS OF
SERVICE AND AS SUCH SHALL REMAIN THE
PROPERTY OF THE ARCHITECT. THEY HAVE
BEEN PREPARED FOR A SPECIFIC PROJECT
AND SHALL NOT BE USED IN CONJUNCTION
WITH ANY OTHER PROJECT WITHOUT THE
PRIOR WRITTEN PERMISSION OF THE
ARCHITECT. ALL RIGHTS RESERVED.
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project no. 11235
drawn by KT/mtf

issued January 16, 2019

sheet title

AI





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Carrboro, NC 27510

Agenda Item Abstract

File Number:19-130

Agenda Date: 4/9/2019

File Type:Agendas

In Control: Board of Aldermen

Version: 1

TITLE:

Economic Development Report for the Month of April

PURPOSE: The purpose of this agenda item is to update the Board on economic development activity within the Town.

DEPARTMENT: Economic and Community Development

CONTACT INFORMATION: Annette D. Stone, AICP ECD Director (919) 918-7319 or
astone@townofcarrboro.org

INFORMATION: The ECD Department has been asked to provide a monthly update of economic activity within the town.

FISCAL & STAFF IMPACT: n/a

RECOMMENDATION: Staff recommends the Board receive the report.

ECONOMIC DEVELOPMENT - PRIVATE SECTOR

South Green



PROJECT DESCRIPTION: Development with 45,000 square feet of multiple commercial buildings on a 5.6 acre site at 501 South Greensboro Street.

CURRENT STATUS: Buildings 1 and 4 are under construction. Known tenants include Atlas Taco Bar, Craftboro Brewing Depot, Nailz (organic salon), and Coronato (pizza by Teddy Diggs). It was announced that Carrboro Yoga will move to South Green. The owner is looking for an alternative tenant for the space that was planned for Montessori School, the building is most suited for a daycare or school. Several tenants have applied for building permits for upfit of units and Nailz has applied for a loan from the Town's revolving loan fund.

PROJECT BACKGROUND: This Conditional Use Permit application proposed multiple commercial buildings on a site at 501 South Greensboro Street that formerly was occupied by Rogers-Triem. The site had considerable known flooding issues, which was addressed through collaboration with Town and NCDOT. The Board of Aldermen set a public hearing for the rezoning and CUP request on April 28, 2015. The project went before the Joint Advisory Boards Meeting on April 2 and ESC on April 8. The Board approved the project, with conditions, on June 9, 2015.

ESTIMATED TAX VALUE: \$13,000,000

Lloyd Farm (no change)



PROJECT DESCRIPTION: A mixed use project with multiple commercial buildings on approximately ~40 acres, including Harris Teeter grocery and energy center. A proposed 200 unit senior living residential facility and 20 townhomes. It is located at the corner of Old Fayetteville Road and Highway 54 on property historically known as Lloyd Farm. The developer is proposing a payment in lieu between \$743,000 and an additionally \$250,000 conditioned on the ability to provide on-site affordable housing units.

CURRENT STATUS: The application for rezoning was approved by the Board on October 23, 2018. A concept plan has been submitted to staff and is under review by the town advisory boards at the joint meeting to be held February 7, 2019.

PROJECT BACKGROUND: Project was originally considered by the Board and denied in 2016. The applicant modified the plan and resubmitted an application in the spring of 2018. A public hearing was held September 25, 2018 and continued until October 23, 2018. The Board approved the Conditional Rezoning on October 23, 2018.

ESTIMATED TAX VALUE: \$64,000,000

Shelton Station



PROJECT DESCRIPTION: A mixed use development located at 410 North Greensboro on 2.64 acres of land with 22,716 sq ft of commercial space, and 94 1 and 2 bedroom apartment units including 20 affordable units.

CURRENT STATUS: The commercial portion of the building is now 80% occupied with UNC Horizons and Figure Eight Films as tenants. The latest schedule is for construction of the residential units to be completed in late spring. They have selected Eller Capital to manage the apartments and pre-leasing has begun. Staff has been meeting with developers to ensure permit compliance including establishing rent rates for affordable units.



PROJECT BACKGROUND: Conditional use permit plans in accordance with the B-1(g) conditional zoning district approved by the Board of Aldermen was granted (with conditions) on April 2, 2013.

ESTIMATED TAX VALUE: Residential Units \$11,000,000

ACTUAL TAX VALUE: Commercial \$3,042,700

Hilton Garden Inn - East Main Square(no change)



PROJECT DESCRIPTION: A five story, 144 room hotel with conference space to be located immediately behind the existing East Main Square shopping strip.

CURRENT STATUS: The developer has reported that construction is on hold until further notice.

PROJECT BACKGROUND: The project received a CUP in March of 2016 and a two year extension for the permit in January of 2018.

ESTIMATED TAX VALUE: \$12,000,000

Other Updates:

- Boer Brothers Heating and Cooling – project is approximately 95% complete for construction of new office and warehouse space located at 630 Hwy 54 W.
- Claremont South Commercial - a two story mixed use building with the first floor containing 6,797sf of office space and the 2nd floor containing 4,879sf and a total of four residential units. Conditional Use Permit originally approved by the Board of Aldermen in April 2012. Construction on this project has not yet begun.
- 201 North Greensboro (previously known as CVS Property) is under new ownership. The new owners are interested in office/retail development on the site and have had initial concept discussions with town staff. There is new residential structure proposed for 104 Center Street. The residential structure is currently working through Development Review and the Board of Adjustment for a variance.
- Space For Sale or Lease –



Address	Description	Sale/Lease Price/Contact Info
505 W Main Street	1400 SF Office Bldg	For Sale \$525,000 Thomas Watts (919) 260-0054
610 Jones Ferry Road	11,683 SF office/light manufacturing Willow Creek Professional Center	For Sale – \$20 - \$22 SF Tommy Honey (Avison Young) Tommy.Honey@avisonyoung.com
202 South Greensboro	900 SF office flex space next to Glass Halffull aka the Old Post Office building	Annual Lease – Price not disclosed Michael Joerling mailto:joerling10@gmail.com
311 East Main Street	8000 SF retail/flex space Old Fireplace Buidling next to Wings	For Sale/Lease – Price Not Disclosed Jim Shortbridge jleons@hotmail.com
602 Jones Ferry Road	4,620 SF retail space at Willow Creek Shopping Center	Annual Lease \$16 SF Tommy Honey (Avison Young) Tommy.Honey@avisonyoung.com
209 and 205 Lloyd Street	Office Space	Annual Lease – \$19 SF N. R. Milans and Associates nrmilan@aol.com
104 NC – 54 Hwy	Carrboro Plaza 1200 SF	Annual Lease – \$21-\$26 SF

		Morris Commerical Jodi Amanda Tata (919)-407-1285
Tr 4 Berkshire Manor	1.4 acres located at the intersection of Main and Hwy 54	For Sale - \$325,000 Clayton Commercial Realty (919) 260-6078
410 N Greensboro Street	1250 – 4645 SF 1 st floor retail space Shelton Station	Annual Lease - \$27 sq. ft. Legacy Real Property Group (919)967-6711
250 E. Winmore Ave	914 SF Office Space	For Sale - \$258,000 or Annual Lease \$24 SF Morris Commercial – John Morris (919)942-1141
115 Ruth Street	2.27 AC Vacant Land	For Sale \$200,000 Keller Williams Elite Realty Michelle Edwards (919)484-2280
Chapel Hill Comps		
136 E Rosemary St	84,013 SF Class B Office Space	Avg Annual Lease \$31 SF
210 N Columbia St	8176 SF Class B Office Space	Avg Annual Lease \$26 SF
150 Providence Rd	10,000 SF Class B Office Space	Annual Lease \$18.50 SF
300 Market Street	1400 SF Class B Office Space	Annual Lease \$24 SF
400 W Franklin St	3600 SF Retail	Annual Lease \$28 SF
1728 Fordham Blvd	Retail at Rams Plaza	Between \$16 - \$22 SF

Sources: Loopnet and ECD



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Agenda Item Abstract

File Number:19-131

Agenda Date: 4/9/2019

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Version: 1

TITLE:

Public Hearing for Jones Creek Greenway (C-5181) 15% Design

PURPOSE: The purpose of this agenda item is to provide an update on the status of the Jones Creek Greenway at 15% design and to receive comments from the Board and members of the public.

DEPARTMENT: Planning

CONTACT INFORMATION: Patricia McGuire - 919-918-7327; Christina Moon - 919-918-7325; Zachary Hallock - 919-918-7329

INFORMATION: The Jones Creek Greenway is a short segment of the Bolin Creek Greenway system that will extend from the northern end of Lake Hogan Farms Road to the existing southern end of Orange County's Jones Creek Greenway. While the Carrboro portion of the greenway is relatively short, it includes an important crossing over Jones Creek which, once completed, will enhance the corridor making it more accessible for users of different abilities. The crossing will also have to be designed to accommodate future road connections: north-south and east-west. The corridor provides a direct connection from the Lake Hogan Farms development to Morris Grove Elementary School and is already heavily used. The county's segment, stretches north between Jones Creek and the future Twin Creek Park.

The Town selected Wetherill Engineering out of Raleigh to complete the design/bid process for the project and held a kick-off meeting on January 30th. Greenway designs typically include check-in points at key intervals in the design process-usually 30% and 60% completion. Following the Board's interest in public engagement, staff has scheduled drop-in information sessions followed by public hearings at 15%, 30%, and 60% design. At 60%, the overall project design is typically considered completed and consultants shift their focus to preparing for permit approvals from appropriate state and federal agencies. Staff will continue to keep the Board appraised on the status of the project following 60% design but does not anticipate seeking additional public comment, in order to keep the project on schedule.

Subsequent to the kick-off meeting, the project was discussed at a joint meeting with the Chapel Hill-Carrboro School System. Town staff arranged a meeting with Police Department, Fire Department, Orange County and the School Assistant Superintendent to discuss ways to address EMS access and related safety interests along the greenway. Staff will continue to work with the consultants to integrate thoughtful design elements such as signage into the project design. Staff has also heard an interest in collecting more accurate user data for existing and future bike-ped infrastructure as part of the comprehensive bicycle transportation plan update and will work with Wetherill Engineering to locate a place for a bike-ped counter along the trail.

Agenda Date: 4/9/2019

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FISCAL & STAFF IMPACT: The anticipated total cost of the project is \$850,250: 80% (\$680,200) to be funded by federal Congestion Mitigation Air Quality Improvement (CMAQ) funds and the remaining 20% (\$170,050) through local match. The use of CMAQ funds includes a Greenhouse Gas emission analysis before and after completion.

RECOMMENDATION: Staff recommends that the Board receive the presentation from Wetherill Engineering, offer feedback and receive public comment to help inform the design for the Jones Creek Greenway.

A RESOLUTION RECEIVING PUBLIC COMMENT ON THE JONES CREEK GREENWAY
AT 15% DESIGN

WHEREAS, the Board of Aldermen has made it a policy to hold public hearings on Town projects; and

WHEREAS, the Board of Aldermen has received a presentation on the 15% design for the Jones Creek Greenway; and

WHEREAS, the Board has held a public hearing to receive public comment on the Jones Creek Greenway at this milestone.

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

This the 9th day of April in 2019.



301 W. MAIN ST.
CARRBORO, NC 27510
919-918-7325
CONTACT:
TINA MOON
PLANNING ADMINISTRATOR

JONES CREEK GREENWAY TIP #C-5181

PLANS PREPARED BY:



1223 Jones Franklin Rd.
Raleigh, N.C. 27606
License No. F-0377
Bus: 919 851 8077
Fax: 919 851 8107

INCOMPLETE PLANS
DO NOT USE FOR R/F OR AS-BUILT

DOCUMENT NOT CONSIDERED
FINAL UNLESS ALL
SIGNATURES COMPLETED

DATE: APRIL 9, 2019

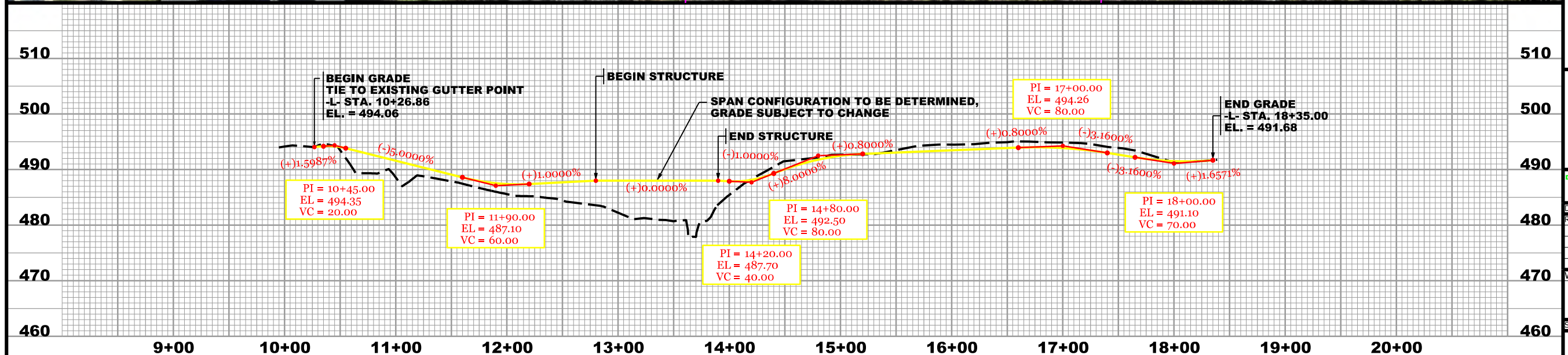
REVISIONS:

NO.	DATE

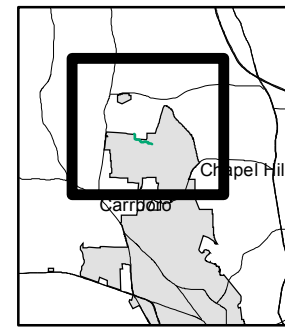
WEI PROJECT NO.:

19336.01

SCALE: 1"=50'



Jones Creek Greenway



0 950 1,900 Feet

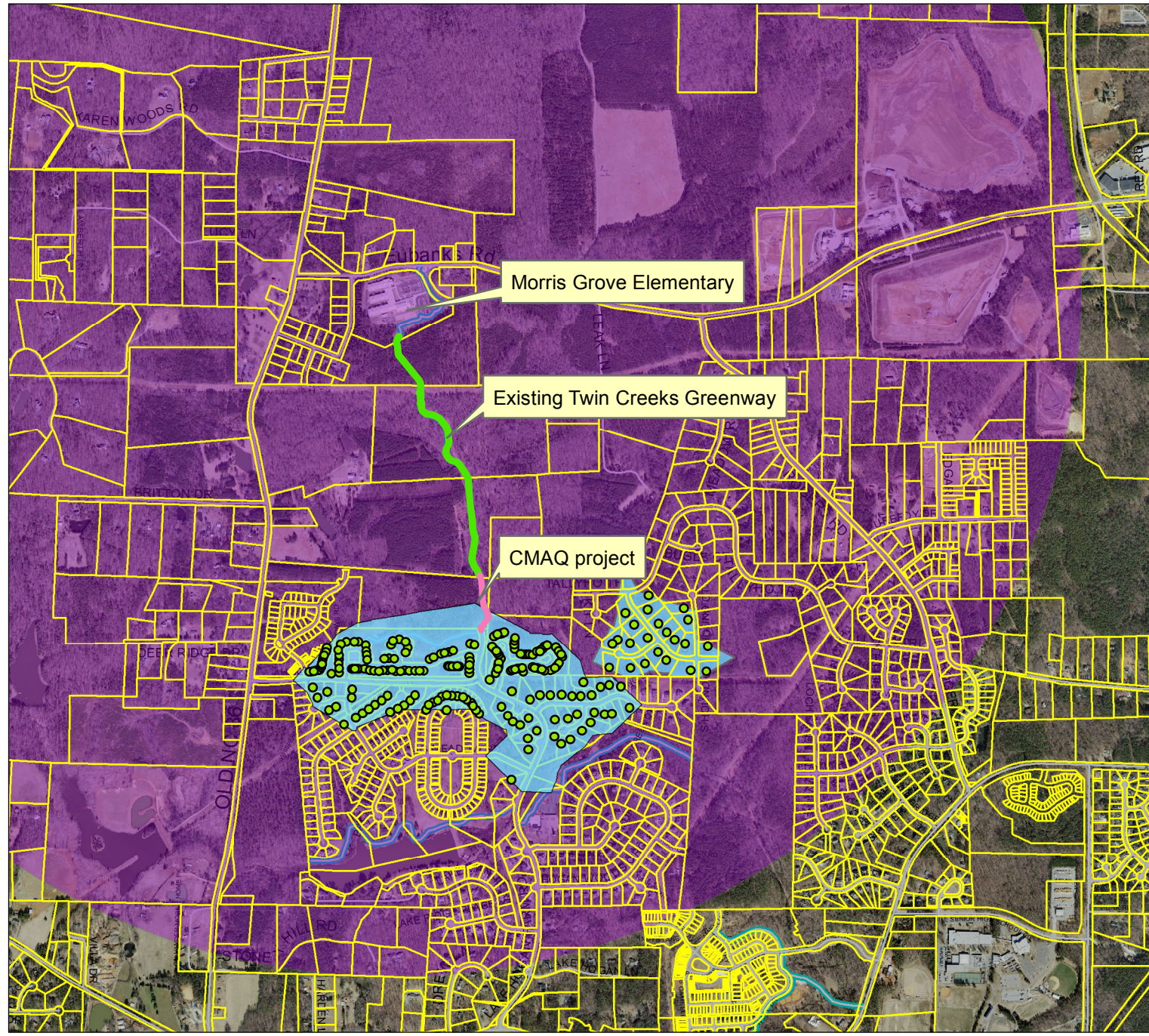
**THIS MAP IS NOT A CERTIFIED SURVEY
NO RELIANCE MAY BE PLACED IN ITS
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TOWN OF CARRBORO
301 W. Main St.
Carrboro, NC 27510

Created June 30, 2015





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File Number:19-133

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TITLE:

Review of Request for Permission to Conduct Concrete Pours Outside of Noise Ordinance Provisions

PURPOSE: The Board of Aldermen is asked to review and discuss a request from Inter Faith Council regarding the need to conduct nighttime concrete pours associated with construction of a new building at 110 West Main Street.

DEPARTMENT: Planning and Police

CONTACT INFORMATION: Marty Roupe, Development Review Administrator, 919-918-7333 & Walter Horton, Police Chief, 919-918-7408

INFORMATION: In January 2019, the Board of Aldermen received a report on current regulations relating to noise. Information regarding that discussion can be found here:

Agenda item:

<https://carrboro.legistar.com/LegislationDetail.aspx?ID=3834179&GUID=DC75D872-FC26-47C7-97AC-907FAB0F094B&Options=ID|Text|&Search=noise+regulations>

The noise ordinance is included as *Attachment A*, and an excerpt from the 1/15/19 Board meeting minutes is included as *Attachment B*.

At this time, Inter Faith Council has submitted a letter (*Attachment C*) to the Town Manager requesting permission to conduct multiple nighttime concrete pours associated with construction of a new building at 110 West Main Street. The pertinent excerpt from the letter reads as follows:

*A question was brought to the table last week concerning major concrete pours. **We are planning approximately 4 or 5 pours**, one for each floor, and one for the foundation and one for the foundation walls with each being one day in duration. We are planning on pumping all our concrete to minimize time and we will be staging our pours on West Main Street. **NCDOT does not want us pouring concrete on West Main Street during NCDOT prime time usage of the street.** CT Wilson Construction Co. preference is to do nightly pours. **Pours will start at 3 AM and conclude at 6:30 AM.** I know the Town of Carrboro has a Night Noise Ordinance which prohibits such practices. Weighing the two possibilities and*

Agenda Date: 4/9/2019

File Type:Agendas

In Control: Board of Aldermen

Version: 1

considering the impact to pouring during the day or pouring late at night we think the minimal impact to the town would be night pours which NCDOT & the Town Building Department agrees.

The Board is asked to discuss the matter and consider authorizing the Manager to approve of these activities as a permissible exception of the noise ordinance.

FISCAL & STAFF IMPACT: No fiscal impact is noted in association with this agenda item.

RECOMMENDATION: Town staff requests that the Board discuss authorizing the Manager to approve multiple nighttime concrete pours in association with construction of a new building at 110 West Main Street.

Article II

MISCELLANEOUS OFFENSES

Section 5-11 Noise Generally

No person may authorize or cause the emission from any property or source under his control any noise that is both:

- (1) Sufficiently loud to frighten or pose a danger to the health of or seriously disturb any person who:
 - a. if the noise emanates from a source located on private premises, is located on other premises (including other dwelling units or rented premises located on the same tract of land), or (Amend. 4/27/82)
 - b. if the noise emanates from a street or other public property, is located on private property or the street or other public property, and
- (2) Louder, or of greater duration, or otherwise more disturbing than is reasonably necessary for the performance of some lawful public or private function, enterprise, operation, or activity.

Section 5-12 Particular Noise (Amend. 11/16/93)

The following are declared to be illustrations of noises prohibited under the foregoing section, and are hereby declared to be unlawful, but this list shall not be exhaustive:

- (1) The playing of any radio, television, tape recorder, phonograph, or similar electronic device or any musical instrument so as to disturb the comfort, quiet or repose of persons in any place of residence or so as to interfere substantially with the operations of any church, school, theater, library or other similar place of assembly.
- (2) The use of any drum, loudspeaker, or other amplification instrument or device for the purpose of attracting attention by the creation of noise to any performance, show, ale, display, advertisement of merchandise, or other commercial venture.
- (3) Any party or assembly of persons in a dwelling unit or on residential premises producing loud and raucous noise after 11:00 p.m. that tend to disturb the comfort, quiet, or repose of persons in other dwelling units or on other residential premise. The person in possession of the premises where such a part or assembly of persons takes place shall be deemed responsible for the emission of loud and raucous noises under this subdivision. (Amend. 4/27/82)

- (4) The operation or use of any of the following tools, machinery, or equipment, when such operation or use takes place (i) outside of a fully enclosed structure; and (ii) within 300 feet of a residentially occupied structure that is not in the possession of the party responsible for the noise at issue; and (iii) after sunset on any day or before 7:00 a.m. on any day except Sunday and before 12:00 noon on Sunday. However, this prohibition shall not apply when work must take place on an emergency basis for health or safety reasons, or when work is undertaken within a public street right-of-way by (i) a utility pursuant to an encroachment agreement, (ii) the town, or (iii) the North Carolina Department of Transportation. (Amend. 1/16/2001)
- (a) Earth moving or clearing power equipment.
 - (a) Chain saws, brush cutters, wood chippers, or similar power equipment.
 - (a) Power saws
 - (a) Power driven hammers or jackhammers.

Section 5-12.1 Motor Vehicle Noises (Amend. 11/16/93)

The following are illustrations of noises, produced in connection with the operation or use of motor vehicles, that are prohibited under Section 5-11 and are hereby declared to be unlawful, but this list shall not be exhaustive:

- (1) The blowing of a horn on any motor vehicle except when the horn is used as a warning device.
- (2) The operation of any motor vehicle without a muffler or with a muffler that is so defective or so designed that the vehicle emits an unusually loud noise.
- (3) The operation of any motor vehicle so as to create unnecessary and unusual noise through the screeching of tires or racing of engines.
- (4) The operation or use of a motor vehicle with amplified sound produced by a radio, tape player, compact disc player or other soundmaking device or instrument within the motor vehicle such that the sound is plainly audible at a distance of 100 feet or more from the motor vehicle.

REVIEW OF CURRENT REGULATIONS PERTAINING TO NOISE

The Board of Aldermen was asked to receive a presentation on current regulations pertaining to noise and provide any necessary feedback or direction on possible changes and / or additional outreach efforts regarding the topic.

Marty Roupe, Development Review Administrator for the Town of Carrboro, presented a review of the town's noise regulations.

Alderman Gist suggested engaging in an information effort to ensure the residents of Carrboro understand the current regulations.

Police Chief Horton provided an overview of some recent noise issues and noted that the current regulations seem to be adequate.

A MOTION WAS MADE BY ALDERMAN GIST, SECONDED BY ALDERMAN FOUSHEE, THAT THE BOARD OF ALDERMEN ACCEPT THIS PRESENTATION ON CURRENT REGULATIONS PERTAINING TO NOISE. VOTE: AFFIRMATIVE ALL.

BICYCLE PLAN UPDATE

The purpose of this agenda item was to provide the Board with the latest information on the schedule and scope of the bicycle plan update as well as the make-up of the proposed steering committee members.

Zachary Hallock, Transportation Planner for the Town of Carrboro, presented a staff report on the status of the bicycle plan update and the steering committee.

Alderman Slade stated that his approval of this item is conditioned on the addition of a member of the steering committee that is focused on climate change.

Alderman Haven-O'Donnell also stressed the need for an environmentally-focused aspect to the steering committee.

Alderman Foushee stated that she was glad to see diverse voices at the table for the Bicycle Plan Steering Committee.

A motion was made by Alderman Seils, seconded by Alderman Haven-O'Donnell, that the following resolution be approved.

A RESOLUTION RECEIVING AN UPDATE ON THE BICYCLE PLAN AND DIRECTING STAFF TO IDENTIFY STAKEHOLDERS FOR THE BICYCLE PLAN STEERING COMMITTEE

March 28, 2019

David Andrews
Town Manager
Town of Carrboro, NC
301 West Main Street
Carrboro, NC 27510

CC: Large Concrete Pours

Dear David:

My name is Peter Kamel, I am the Construction Manager for the new IFC FOODFirst project located 110 West Main Street in Carrboro, NC. The IFC has hired CT Wilson Construction Company of Durham, NC to construct our project. Jim Spencer Architects is our architect. We are presently working with the Town Building Department to acquire a building permit. During our meetings we have met with NCDOT, Sungate, Carrboro Public Works and the Building Department to answer questions concerning the building of our project. Meeting have been going well with input by all parties progressing for a Demolition Permit the 1st of April and a building permit by the middle of April.

A question was brought to the table last week concerning major concrete pours. We are planning approximately 4 or 5 pours, one for each floor, and one for the foundation and one for the foundation walls with each being one day in duration. We are planning on pumping all our concrete to minimize time and we will be staging our pours on West Main Street. NCDOT does not want us pouring concrete on West Main Street during NCDOT prime time usage of the street. CT Wilson Construction Co. preference is to do nightly pours. Pours will start at 3 AM and conclude at 6:30 AM. I know the Town of Carrboro has a Night Noise Ordinance which prohibits such practices. Weighing the two possibilities and considering the impact to pouring during the day or pouring late at night we think the minimal impact to the town would be night pours which NCDOT & the Town Building Department agrees.

CT Wilson Construction will also be milling parts of West Main Street and Weaver Street at night to minimize impact to the town. This work would be early evening and last about an hour or two. Water and sewer lines connections on West Main Street are scheduled for the day but could possibly run into the evening.

We are asking the Chief of Police Walter Horton for permission to waive the Noise Ordinance requirements during these times.

David, I appreciate you taking the time to read my letter and consider my proposal. The Town of Carrboro and the IFC have been good partners to the citizens of Carrboro and look forward to continuing service of the community.

Sincerely,

Peter Kamel
IFC Construction Manager



Town of Carrboro

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

Agenda Item Abstract

File Number:19-132

Agenda Date: 4/9/2019

File Type:Agendas

In Control: Board of Aldermen

Version: 1

TITLE:

Review of Preliminary Draft Ordinance and Master Plan to Rezone Property at Old NC 86 and Eubanks Road to a Site Specific, Flexible Zoning (FLX) District

PURPOSE: The purpose of this item to provide the Board with an opportunity to review in more detail the preliminary draft ordinance and graphic illustrations prepared as part of the application to rezone property to a FLX district, and to consider the first round of advisory board comments on the draft ordinance provisions.

DEPARTMENT: Planning

CONTACT INFORMATION: Christina Moon - 919-918-7325, Patricia McGuire - 919-918-7327, Nick Herman - 919-929-3905, Marty Roupe 919-918-7333

INFORMATION: At the February 26, 2019 meeting, the Board of Aldermen reviewed the preliminary draft ordinance and graphic illustrations prepared in relation to an application to rezone property to a FLX District and referred the materials to the advisory boards for comments. The Board also approved a possible schedule for bringing the rezoning request to public hearing in May or June of this year (Attachment B). At the close of the Board's discussion, Mayor Lavelle requested an opportunity for the Board to take a closer look at the FLX proposal to better analyze the draft ordinance and master plan and to compare it with the five concept plans developed as part of the 2011 facilitated workshop lead by the Durham Area Designers (DAD). The agenda item and background materials from February 26, 2019, including the draft ordinance, may be viewed here:

<https://carrboro.legistar.com/LegislationDetail.aspx?ID=3869266&GUID=2904B5F7-1425-4E1F-9A66-C3420EAFFC69&Options=&Search=>

The DAD report may be viewed here:

<http://www.townofcarrboro.org/DocumentCenter/View/122/NSA-Workshop-Final-Report->

Additional details and staff analysis of the DAD report may be found at the following link:

http://www01.townofcarrboro.org/BoA/Agendas/2013/01_29_2013_B1A.pdf

The FLX rezoning materials and draft ordinance were presented to advisory boards at the March 7th Joint

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Review meeting and shared at a public drop-in session on April 8th. Comments from the Northern Transition Area Advisory Committee, Transportation Advisory Board, Environmental Advisory Board, and Planning Board have been provided (Attachment C). Comments from the drop-on session will be provided at the meeting.

Based on the Board's discussion, staff could bring back an agenda item before the end of April to request to set a public hearing. The applicant has noted that they have limited availability in June, which may affect the previously outlined schedule. It is staff's understanding that the Board of Aldermen may be interested in discussing the public engagement process, including additional drop in sessions or other ideas.

Other matters worth noting, in order to keep the proposed schedule on track, include but are not limited to receiving a transportation impact analysis (TIA), additional analysis of how stormwater will be handled and addressed on the site, architectural standards for all proposed land uses, and further refinements to the proposed site plan incorporating changes and identifying maximum residential densities and commercial square footages. A scoping meeting for the TIA is scheduled for Monday, April 8. It is not yet clear when the TIA will be completed. The applicant can speak further during Tuesday's discussion about the timeline for completing the other identified elements.

FISCAL & STAFF IMPACT: Staff time will also be necessary for public notice, drop-in sessions and public hearing agenda preparation.

RECOMMENDATION: Staff recommends that the Board discuss the preliminary draft materials and use the resolution provided (*Attachment A*) to offer input on the preliminary ordinance and master plan and direction on the public engagement process and schedule.

A RESOLUTION REGARDING THE DRAFT ORDINANCE (DATED FEBRUARY 22) ESTABLISHING
DEVELOPMENT REQUIREMENTS FOR THE EUBANKS-OLD NC 86 FLX ZONING DISTRICT

WHEREAS, the Board of Aldermen has reviewed the draft Eubanks-Old NC 86 FLX ordinance, considered advisory board comments and received public input

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

This the 9th day of April in the year 2019.

Bridgit Adamou: (Zero)
 Betty Curry: (Six) Foushee, Gist, Haven-O'Donnell, Lavelle, Seils
 Luther Gates: (Zero)
 Gabriel Vinas: (Six) Foushee, Gist, Haven-O'Donnell, Lavelle, Seils, Slade

The Deputy Town Clerk tallied the ballots and announced the results.

A motion was made by Alderman Seils, seconded by Alderman Haven-O'Donnell, that the following resolution be approved:

**A RESOLUTION MAKING APPOINTMENT(S) TO THE AFFORDABLE HOUSING
ADVISORY COMMISSION**

Section 1. THE BOARD OF ALDERMEN HEREBY APPOINTS THE FOLLOWING APPLICANTS TO THE AFFORDABLE HOUSING ADVISORY COMMISSION:

Seat Designation	Appointee	Term Expiration
Member	Betty Curry	2/2022
Member	Gabriel Vinas	2/2022

Section 2: This resolution shall become effective upon adoption.

This the 26th day of February 2019.

The motion carried by the following vote:

Aye: Mayor Lydia Lavelle, Alderman Barbara Foushee, Alderman Jacquelyn Gist, Alderman Randee Haven-O'Donnell, Alderman Damon Seils, Alderman Sammy Slade

Excused: Alderman Bethany Chaney

**REVIEW OF PRELIMINARY DRAFT ORDINANCE, MASTER PLAN, AND SCHEDULE FOR
CONSIDERING A PETITION TO REZONE PROPERTY AT OLD NC 86 AND EUBANKS
ROAD TO A SITE SPECIFIC, FLEXIBLE ZONING (FLX) DISTRICT**

The purpose of this item was to provide the Board with an opportunity to review the preliminary draft ordinance and graphic illustrations prepared as part of the application to rezone property to a FLX district and to consider a schedule for moving forward to a public hearing for formal consideration.

Tina Moon, Planning Administrator, presented the staff report.

Alderman Seils recommended adding formal consideration by Chapel Hill Transit on transit-related issues. He also expressed concern about the parking plan and the use of the term "overflow parking."

Tina Moon said the parking plan was intended to provide flexibility for future parking needs.

Mayor Lavelle suggested “satellite parking” might be better than “overflow parking” and referenced Morris Grove Elementary as an example.

Alderman Foushee requested more information on affordable housing in this plan.

Tina Moon highlighted the variety of residence sizes in this plan.

Alderman Foushee clarified that pricing was a key considering in affordability, not just size.

Alderman Gist used the Southern Village development in Chapel Hill as an example that size, density and affordability are not always related.

Alderman Slade asked about future expansion and whether the proportion or ratio of planned sub-districts would be maintained if additional parcels are added to the District.

Tina Moon agreed that this is an important question and needs further consideration.

Alderman Slade pointed to table 5 on Attachment D-6, he expressed we should learn lessons from our downtown constraints so that building setback minimums be sufficient to allow for separated bike lanes, on street parking, 10’ sidewalks, tree strips large enough to accommodate canopy street trees, etc.. He also expressed agreement with Alderman Seils parking concerns and stated that at a minimum we should not be prescribing an additional 20% parking beyond the amount of parking associated with the allowed use with the highest prescribed parking standard. He also flagged for staff to look at table 3 on Attachment D-5; minimum residential unit sizes for commercial areas are too large, they should be smaller than residential. He also stated that instead of having these as minimums they should be maximums. He also pointed to table 6 on attachment D-6 questioning why the height of commercial buildings is less than that of residential ones.

Mayor Lavelle wanted to ensure that an opportunity for additional Board review and feedback would be available prior to the May/June timeframe in the resolution. She also asked Tina Moon to ensure that all relevant advisory boards are notified of the Joint Advisory Board meeting on March 7.

Alderman Seils asked that the plan clarify the term “rural setting.”

A motion was made by Alderman Gist, seconded by Alderman Seils, that the following resolution be approved:

**A RESOLUTION APPROVING A SCHEDULE FOR CONSIDERING A PETITION FOR
CHANGE OF ZONING TO A SITE SPECIFIC, FLEXIBLE ZONING DISTRICT**

WHEREAS, on June 21, 2016, the Board of Aldermen of the Town of Carrboro adopted amendments to the text of the Carrboro Land Use Ordinance, authorizing the Board to establish site specific flexible zoning districts, (FLX); and

WHEREAS, on February 7, 2017, the Board of Aldermen approved a request from Parker Louis, LLC to submit a petition for change of zoning for property at the north east corner of NC Old 86 and Eubanks Road to a FLX district; and

WHEREAS, a possible schedule for considering the petition is as follows:

1. Present formal application: preliminary ordinance/master plan February 26, 2019
2. Joint Advisory Board Review March 7, 2019
3. Public Input/drop in Session?
4. Revisions (mid-March to mid-April)
5. Submittal of TIA/Stormwater Analysis (early April)
6. Board of Aldermen Request to Set Public Hearing April 17, 2019
7. Public Input/drop-in Session?
8. Revisions (mid-April to mid-May)
9. Joint Advisory Board Review May 2, 2019
10. Board of Aldermen Consideration of Annexation Request May/June 2019
11. Board of Aldermen Public Hearing on FLX ordinance & rezoning May/June 2019

NOW, THEREFORE, the Board of Aldermen of the Town of Carrboro resolves that Parker Louis LLC may proceed with the schedule identified above the requested rezoning to a site specific, flexible zoning district subject to the process described in Article XX of the Carrboro Land Use Ordinance for map amendments and the specific requirements outlined in Section 15-141.5 for FLX districts, and the findings from the site specific planning study.

BE IT FURTHERMORE RESOLVED, that the Board of Aldermen offers the following additional comments:

Comments by the Board were provided in discussion items noted above.

This the 26th day of February 2019.

The motion carried by the following vote:

Aye: Mayor Lydia Lavelle, Alderman Barbara Foushee, Alderman Jacquelyn Gist, Alderman Randee Haven-O'Donnell, Alderman Damon Seils, Alderman Sammy Slade

Excused: Alderman Bethany Chaney

MATTERS BY BOARD MEMBERS

Alderman Foushee suggested removing specific references to environmental issues from the Board retreat topics and instead focus on problem-solving and discussion techniques in general.

Other board members expressed general agreement with this idea, but Alderman Slade wanted to ensure that this would not preclude the mentioning of specific environmental issues for illustrative example purposes.

MOTION WAS MADE BY ALDERMAN FOUSHEE, SECONDED BY ALDERMAN HAVEN-O'DONNELL TO REMOVE THE "ENVIRONMENTAL" FOCUS FROM THE PROBLEM SOLVING WORK THAT THE BOARD PLANS TO DO DURING THEIR ANNUAL RETREAT. VOTE: AFFIRMATIVE SIX, EXCUSED ONE (CHANEY)

ADJOURNMENT

MOTION WAS MADE BY MAYOR LAVELLE, SECONDED BY ALDERMAN HAVEN-O'DONNELL, TO ADJOURN THE MEETING. VOTE: AFFIRMATIVE SIX, EXCUSED ONE (CHANEY)

TOWN OF CARRBORO

Planning Board

301 West Main Street, Carrboro, North Carolina 27510

THURSDAY, APRIL 4, 2019

Comments regarding the Preliminary Draft Ordinance and Draft Master Plan for the FLX District at Old NC 86 and Eubanks Road

The intent of FLEX was to create a unified design concept that integrated different uses. All of the schemes that were developed during the charrette incorporated this concept of integrated uses. The developer submitted a concept which he, no doubt believes, met the intent of the process, but had one design aspect that prevented the integration of the different uses. This aspect was the extension of the single family residential area down to Eubanks Road such that it separated the multi-family from the residentially scaled retail/office area, psychologically if not physically preventing the appropriate integration of the multi-family with the retail/office area. We would strongly urge a revision of his concept to remove this extension of the single family residential area. We have included rough sketches showing multi-family in red, residentially scaled retail/office in black, and single-family in brown, and purple representing public open space. Gray represents roads and parking areas, while the orange line represents a pedestrian connection. Blue are possible sites for stormwater BMPs. We also urge the developer to consider the arrangement and scale of uses in Franklin Square, located in Chapel Hill at the east end of Franklin Street. Clustering the retail/office uses would allow for more open space.

We also urge the alderman to consider strengthening the language regarding affordable housing as provided for in Sec. 15-350-D. We would like to see affordable units scattered throughout the development and for these to include both multi-family and single-family options, for renters and for homebuyers.

We also have concern about the ability of roads in the area to handle the traffic generated by the development of the site, but we also recognize that this area will densify in the future and we recommend phasing this development with improvements to road and other infrastructure.

We also are concerned about potential blasting on the site and recommend looking into raising the site to prevent the need for extensive blasting.

We believe the optimal access for this property would be off of Eubanks across from Dromoland, and a second point of access off of Eubanks at the roundabout. The single family road should extend the full length of the northern end of the parcel to allow for future connections to adjacent properties.

These are our initial thoughts. We look forward to collaborating with you.

Motion was made by Clinton; second by Foushee

VOTE:

AYES: (4) Clinton, Foushee, Whittemore, Gaylord-Miles

NOES: (1) Poulton

ABSTENTIONS: (0)

ABSENT/EXCUSED: (4) Fray, Meyer, Vance, Petrin

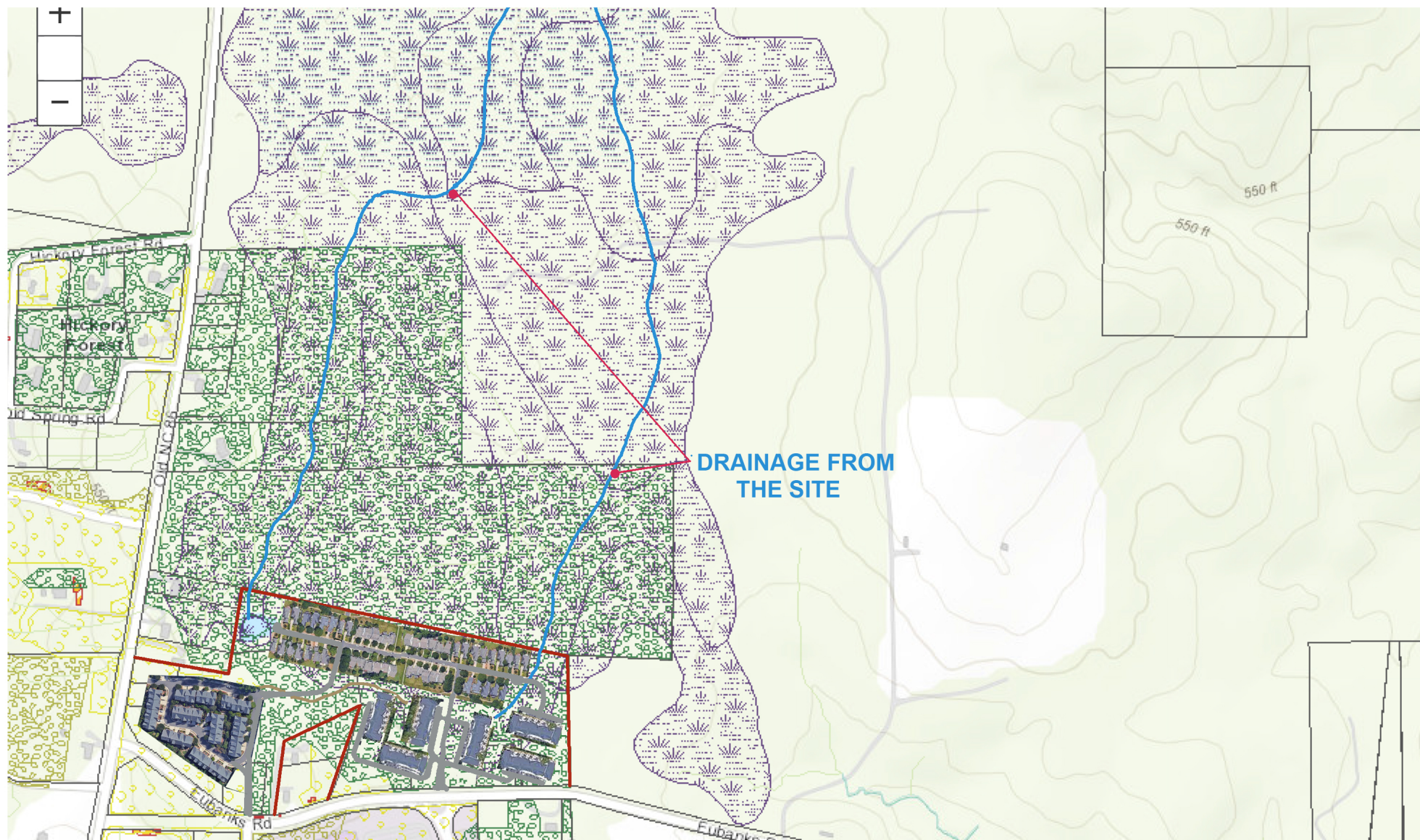
Rachel Gaylord-Miles

(Chair)

04/5/19

(Date)







TOWN OF CARRBORO

Environmental Advisory Board

301 West Main Street, Carrboro, North Carolina 27510

RECOMMENDATION

March 25, 2019

Primary Draft Ordinance, Master Plan, and Petition to Rezone Property at Old NC 86 and Eubanks Road to a Site Specific, Flexible Zoning District (FLX)

Motion was made by Wood and seconded by Kaufman that these recommendations be considered:

Site planning

- Use a tool such as iTree to estimate carbon capture eliminated.
- Supply a LEED worksheet.
- Strive for carbon neutral or negative design.
- Provide on-site renewal energy or make buildings renewable energy ready.
- Retain or integrate open space and contiguous, protected wildlife corridors.

Storm water

- Increase stormwater design to address up to 100 year events.

Water usage

- Implement grey water recycling with cisterns for commercial building
- Green roofs and walls

Infrastructure/Transportation

- ADA compliant compacted dirt walking paths rather than hard surface
- Use raised walkways for any through wetlands if it is done.
- To minimize idling time and implement an east-bound turn lane into school.
- Maintain bicycle and pedestrian connectivity northbound from school and Greenway south of Eubanks.

Building materials

- Source materials locally (within 50 miles if possible)
- Use cement substitutes to reduce carbon footprint.
- Use materials that emit low levels or no air pollutants (adhesives, paints) to allow people with chemical sensitivity equal access.

- Use salvaged/recycled materials
- Strive for net-zero or net-positive construction.

Landscaping

- Use native plants and no invasive species using Town planting guide as a reference.
- To the greatest degree possible use integrated pest control measures.
- Abide by shading requirements based on localized uses – eg residential shading requirements for residential area, parking lot shading requirements for parking lots.
- Retain existing forest canopy to the greatest extent possible.

We recommend some level of co-housing.

Increase urban transition zone (buffer) between development adjacent to wetlands to 100 feet and streams to 200 feet.

VOTE:

AYES: Wood, Kaufman, Sinclair

ABSENT/EXCUSED: O'Connor, Turner, Gavin

NOES: Desai

ABSTENTIONS: (0)

for _____ 3-26-19
(Sonia Desai, Vice-Chair) (Date)

Commercial	Mixed Use	Neighborhood	Single-lot Residential	Techniques/Recommendations/Goals	Resources	Town Guiding Principles and Ordinances
Energy						
x	x	x	x	Meet minimum LEED energy efficiency standards for use (certified)	LEED-ND - p. 78; LEED-NC - pp. 31-33	
x	x	x	x	Complete Energy Efficiency Scorecard	LEED-NC	
x	x	x		Designed to promote public transportation, bikes, pedestrians	KC IS - pp. 24-25,	2020 - 4.3, 3.24, 3.25, 3.27
x	x	x	x	Orient buildings for solar energy - passive and active	LEED-ND - p. 96;	2020- 5.5
x	x	x	x	Prevent blocking solar resources	ILBI - p. 39	2020- 5.5
x	x	x	x	Install on-site renewable energy	KC IS - p. 49; LEED-ND - p. 98; LEED-NC - p. 38; ; ILBI - p. 23	
x	x	x		Reduced parking footprint		
x	x			Purchasing green power or renewable energy credits for two years of 100% of energy needs	KC IS - p. 50	
x	x	x	x	Install opening windows to allow for natural ventilation	ILBI - p. 25	
	x	x	x	Reduce energy use by at least 10% over applicable building code	KC IS - p. 15, LEED-ND - p. 100	
x				Reduce energy use by at least 30% over applicable building code		
				Account and mitigate for greenhouse gas emissions	KC IS - p. 13	
x	x	x	x	Use alternative fuels in construction equipment	KC IS - p. 33	
				Reduce energy use: 20%	KC IS - p. 47-48	
x	x	x	x	Design lighting to reduce light pollution	KC IS - p. 42, LEED-ND - pp. 104-06; LEED-NC - pp. 19-20	
x	x	x	x	Install lighting controls (such as photocells and motion-sensitive switches) where appropriate	KC IS - p. 46	
x	x	x		Provide car-sharing/carpooling parking facilities	LEED-ND - p. 61	
x	x	x		Create and implement a transportation demand management program for project (see LEED standards for reducing peak travel use)	LEED-ND - p. 65	
x	x			Provide for individually controllable lighting/temperatures zones	LEED-NC - p. 73-74	

x	x			Provide daylight for building occupants	LEED-NC - p. 77-79; ILBI - p. 25	
x	x			Account for total construction carbon footprint with one-time carbon offset	ILBI - p. 30	
x	x	x	x	Optimize energy performance (post construction)	LEED-NC - p. 35-37	
Water Usage						
x	x	x	x	Minimize use of irrigation systems	KC ISs - 17-18, 54	
x	x	x	x	Reduce indoor water usage by 20% compared to similar buildings	LEED-ND - pp. 80-81; LEED-NC - pp. 21-22, 26-27	OWASA?
x	x	x	x	Use drought-resistant, water-efficient landscaping, proper soil management	KC Infrastructure - p. 56; LEED-ND - pp. 88; LEED-NC - p. 23-24	
x	x	x	x	Install rainwater collection system to significantly mitigate stormwater impacts	KC IS - p. 55	
x	x			Install green roofs / green walls	KC IS - p. 41; LEED-ND - p. 95; LEED-NC - p. 16	
x	x	x		Design stormwater management system to allow reuse	LEED-ND - p. 101	
				100% of water use from precipitation or closed loop water systems	ILBI - p. 20	
Infrastructure - Transportation						
x	x	x		Located within 1/4 mile walking distance of public transportation	LEED-ND - p. 3, 27; LEED-NC - p. 6; ; ILBI - p. 38	
x	x			Implement solid-waste reduction techniques (establish recycling, etc)	LEED-ND - p. 103; LEED-NC - p. 47; ; ILBI - p. 34	
x	x	x		Design to include through streets - connectivity	LEED-ND - p. 1	
				Establish location suitable for CSA (Community Supported Agriculture) drop off	LEED-ND - p. 74	
				Located on site with existing utilities (water, sewer, etc.)	LEED-ND - p. 1	
x	x	x		Provide on-site bike storage suitable to use	LEED-ND - p. 29; LEED-NC - p. 7	
x	x	x		Design or locate the project to connect to existing or planned bicycle infrastructure (e.g., path, lane, multi-use path, bike storage)	LEED-ND - p. 29	
x	x	x	x	Design walkable, tree-shaded streets	LEED-ND - p. 41, 75	Ordinance for Street
x	x	x		Build compact development	LEED-ND - p. 42; ILBI - p. 18	
x	x			Provide plug-in stations for electric vehicles		
x	x			Provide preferred parking for fuel-efficient, low and no-emission vehicles	LEED-NC - p. 8-9	
Building Materials						
x	x	x	x	Use Forestry Stewardship Council (FSC) certified sustainable wood	55; ; ILBI - p. 31	

x	x	x	x	Use renewable materials	KC IS - p. 62; LEED-NC - p. 54	
x	x	x	x	Heavy materials (e.g., bricks) sourced within 500 miles to reduce carbon footprint	KC IS - p. 59; LEED-NC - p. 53; ; ILBI - p. 32	
x	x	x	x	Use cement substitutes to reduce carbon footprint	KC IS - p. 63	
x	x	x	x	Use materials that emit low levels or no air pollutants (adhesives, paints, sealants)	KC IS - p. 57-58; LEED-NC - p. 66-71	
x	x	x	x	Use on-site materials (e.g., use fill from site, use trees for lumber, use rocks for landscaping)	KC IS - p. 32	
x	x	x	x	Design for disassembly to facilitate reuse of materials	KC IS - p. 27; ; ILBI - p. 34	
x	x	x	x	Recycle construction and demolition materials: 75%	p. 103; LEED-NC - pp. 50-51;	
x	x	x	x	Use Life Cycle Cost Assessment - when evaluating the material choices	KC IS	
x	x	x	x	Plan, design, and build with pre-fabricated elements	KC IS p. 28	
x	x	x	x	Plan for efficient construction delivery and staging	KC IS - p. 29	
x	x	x	x	10% of materials sourced within 500 miles	KC IS - p. 59	
x	x	x	x	Use salvaged, recycled materials	102; LEED-NC - p. 52; ; ILBI - p. 34	
x	x	x	x	Seek appropriate LEED certification	LEED-ND - p. 77	
x	x	x	x	Use roofing materials with solar reflective index (SRI) greater than 78 (low roofs) or 29 (steep roof)	LEED-ND - p. 95; LEED-NC - p. 17	
x	x	x	x	Use paving materials with SRI of at least 29	LEED-ND - p. 95; LEED-NC - p. 16	
x	x	x	x	Use paving system at least 50% pervious	LEED-ND - p. 95; LEED-NC - p. 16	
x	x	x	x	Avoid "red-list materials"	ILBI - p. 29	
x	x	x	x	Reuse existing building rather than demolishing it; preserve historic buildings	LEED-ND - p. 89; LEED-NC - p. 48-49	
Landscaping						
x	x	x	x	Implement design elements to nurture human interactions with nature	ILBI - p. 27	
x	x	x	x	Choose plants that are regionally native		
x	x	x	x	Plants sourced in North Carolina to support State economy		
x	x	x	x	Plants sourced within 250 miles to reduce transportation energy use		
x	x	x	x	Avoid using invasive plants as identified in Appendix E of LUO		
				Design natural acoustic buffers	KC IS - p. 43	
x	x	x	x	Landscape to maximize rainwater infiltration and minimize runoff		
	x	x		Prohibit covenant, bylaw, or other legal restrictions that contradict established Town environmental policies, ordinance provisions, and goals	LEED-ND - p. 73	
	x	x		Dedicate permanent, viable growing space to community garden	LEED-ND - p. 73; ILBI - p. 16	
x	x	x	x	Landscape to maximize shading to reduce building cooling load		

Site Planning						
x	x	x	x	Preserve steep slopes in a natural state. At a minimum, avoid developing on slopes >15%	LEED-ND - p. 34-35	Yes-
x	x	x	x	Preserve existing native vegetation - avoid developing sites with significant habitat	KC IS - p. 37; LEED-ND - p. 36-37	Yes-
x	x	x	x	Minimize developed footprint, impervious surface	KC IS - p. 36	Yes-
x	x	x	x	Develop on brownfield or infill sites	KC IS - p. 23; LEED-ND - p. 1, 26; LEED-NC - p. 5; ILBI - p. 15	
x	x	x	x	Maintain connectivity with open space on adjacent properties		
x	x	x		Retain or create open space and wildlife corridors	KC IS - 38	
x	x	x	x	Build on a site adjacent/with connectivity to existing development	LEED-ND - p. 1	
x	x	x		Locate within walking distance of diverse amenities, or establish diverse amenities	LEED-ND - p. 5, LEED-NC -	
x	x	x	x	Avoid development near wetlands and waterbodies (refer to LUO)	LEED-ND - p. 12; LEED-NC - p. 2; ILBI - p. 15	Yes
x	x	x	x	Identify and avoid impacting trees of significance	LEED-ND - p. 91	
x	x	x	x	Limit disturbance beyond developed portions of site	LEED-NC - p. 12	
x	x	x	x	Plan development layout to maximize passive and active solar access		
x	x	x	x	Locate project outside 100-yr floodplain	LEED-ND - p. 19, LEED-NC -	
Resources						
				King County Infrastructure Scorecard (KC IS)	http://your.kingcounty.gov/solidwaste/greenbuilding/scorecard.asp	
				LEED 2009 - Neighborhood Development (LEED-ND)	http://www.usgbc.org/DisplayPage.aspx?CMSPageID=148	
				LEED 2009 - New Construction and Major Renovations (LEED-NC)	http://www.usgbc.org/ShowFile.aspx?DocumentID=8868	
				International Living Building Institute - Living Building Challenge 2.0 (ILBI)	https://ilbi.org/lbc/LBC%20Documents/LBC2-0.pdf	

NORTHERN TRANSITION AREA ADVISORY COMMITTEE

Meeting: Thursday, April 4, 2019

RECOMMENDATION

FLEX District Rezoning Request – Eubanks Road – Zinn properties

Preliminary Recommendations of the Draft FLX District Ordinance & Application
Submitted by the Northern Area Transition Advisory Committee (NTAAC)
April 5th, 2019

The following preliminary recommendations reflect input of current and former members of the NTAAC, as well as multiple residents of the area who have been meeting biweekly since March 7th, 2019. Additionally, many of the above participants have been involved extensively in this process since the 2011 DAD workshop.

Please note that the NTAAC has been compiling a much more comprehensive document of recommendations, however this serves as an initial summary to the following two findings:

- The NTAAC does not find that, at this time, the preliminary draft FLX ordinance and its draft master plan provides sufficient information to guide and regulate the development in the district in a clear way.
- The NTAAC does not find that, at this time, the draft FLX zoning applications development created based on ordinance and master plan sufficiently realizes the vision for the district as envisioned by the participants of the DAD workshop.

Preliminary Recommendations:

- The density of the development should reflect the rural and current character of the area; and be more consistent with the DAD workshop. The NTAAC plans to make a specific recommendation on the density further in to this planning process.
- Any affordable housing density bonuses be defined at the beginning of the planning process.
- To reflect the DAD workshop vision of a mixed-use development, the ordinance should ensure that a phased build out and/or market conditions do not allow for solely residential.
- The ordinance should more closely reflect the vernacular standards as discussed at the DAD workshop, and should comply with the requirements regarding Architectural Standards in Section 15-177 in Article XI.
- The development should maintain a 100-foot road buffer as a minimum.
- Screening should predominantly, but not wholly, be an understated vegetative buffer throughout the edges of development, and comply with the requirements in Article XIX Screening and Trees. The NTAAC requests site-specific street-level visuals or renderings of the proposed screening for both Eubanks Rd and Old Hwy 86.
- Facades of buildings facing Eubanks Road should reflect the rural character of the area and not attempt to create a faux suburban look. The NTAAC requests site-specific street-level visuals or renderings of the building facades.

- To mitigate traffic impacts, a right turning lane into the elementary school at the roundabout should be added, traffic calming measures and roundabouts should be installed on Eubanks Road, and priority should be given completing the Lake Hogan Farm Road extension. The required traffic analysis should capture data that reflects the impact that school traffic has on the area. The NTAAC plans to make more specific traffic mitigation recommendations once a comprehensive traffic analysis has been completed.
- Prioritize the expansion and connection of the Twin Creeks Greenway to the development.
- A multi-use path should be constructed along Eubanks Road to facilitate both pedestrian and bicycle connections to the school and the nearby greenway.
- CH Transit should expand route options to the area, and explore opportunities for bus stops either inside the development or on Eubanks Road.
- Locate parking, especially for the multi-family residential, behind buildings, on the interior of the development.
- Lighting standards and specific measures should be taken to protect the dark skies.
- The Table of Permissible Uses should more closely reflect the proximity of the school and the DAD workshop. The NTAAC plans to contribute more specific comments on the table of permissible uses further in to this planning process.

Recommendations on the Planning Process:

- Expand the currently proposed time table beyond June 2019 and add additional input opportunities to allow for sufficient time for review and consideration by the community.
- Use creative and more extensive outreach efforts. Suggestions could be to hang a banner or signage on the site providing a short URL for more information; mail informational letters to neighborhoods beyond the traditional 1000 foot radius such as Lake Hogan Farms, Deer Ridge Drive, Lucy Lane, Karen Woods; and include future public input sessions on the Town's website, mass emails, and social media.

Respectfully Submitted, by the NTAAC:

Members: Amy Jeroloman (Chair, County Rep), Anahid Vrana (Vice Chair, County Rep), Rachel Dirito (Carrboro Rep), Meg McGurk (Carrboro Rep), and Deb Rich (County Rep)

Staff Liaison: Jeff Kleaveland

Board of Alderman Liaison: Bethany Chaney

(Motion: Vrana; Second: Dorito – Ayes (unanimous))



for chair (Amy Jeroloman) 4/5/19.



TOWN OF CARRBORO

Transportation Advisory Board

301 West Main Street, Carrboro, North Carolina 27510

R E C O M M E N D A T I O N

APRIL 4, 2019

FLX Zoning at Old NC 86 and Eubanks Road

The Transportation Advisory Board of the Town of Carrboro submits the following comments as they relate to the components, requirements, and preliminary concept for the FLX Zoning District development proposed for the property at Old NC Hwy 86 and Eubanks Road.

15-350(f):

Define a medium residential use within the proposed district, which would represent three-plex and four-plex type housing units. This would be distinct from the low density (single family and townhomes) and high density (multi-family) residential uses.

Limit the minimum density on to 15 DU per area as this is a well-documented density which supports transit use.

15-350(g)(1):

Reduce the setback requirements for any buildings oriented towards Eubanks road as this can facilitate reduction in driving speed due to the feeling of entering a village type setting.

15-350(g)(3):

Use pooled greenspace to reduce the single family lot sizes and provide a large, common use, community open space.

Remove the restriction on the percentage of recreation facilities which can be located in common open space.

15-350(g)(4):

Access points along Eubanks Road should be limited to two (2).

If the completion of the Traffic Impact Analysis would indicate improvements are needed at Eubanks Rd and Old NC 86, the preferred intersection type is a roundabout.

If the completion of the Traffic Impact Analysis would indicate improvements are needed at Eubanks and Drummond, the preferred intersection type is a roundabout.

If the completion of the Traffic Impact Analysis would indicate improvements are needed along Eubanks Rd, provision of bike/ped facilities in the form of a separated sidepath (as opposed to a bike lane) should be provided at time of construction.

Design of roundabouts or other improvements along Eubanks Road must include high visibility crosswalks at appropriate locations.

Roadways internal to the development should be interconnected between the access points along Eubanks Road.

Roadways internal to the development should be designed with sidewalks on both sides of the street.

15-350(g)(5)

Protect the shag bark hickory trees currently on the land.

15-350(g)(6):

Consider creation of site specific shared parking ratios to reduce the overall parking space requirements for the commercial and retail uses proposed.

15-350(g)(7)

Provide appropriate internal bike/ped connections such that they would facilitate extension of the Jones Creek Greenway through Morris Grove, across Eubanks Road, and into the proposed development.

Provide an enhanced pedestrian crosswalk where the greenway crosses Eubanks, this should include a high visibility crosswalk, and traffic control such as a Rapid Rectangular Flashing Beacon (RRFB) or High Intensity Activated Crosswalk Beacon (HAWK).

15-350(g)(8)

Coordinate with Chapel Hill Transit to ensure to internal design of the site would facilitate provision of direct transit access (consider stop locations and bus operations during design) with modification to the existing HS route if needed.

15-350(k):

Clarify this language to indicate that bike parking requirements are not reduced in this district and that the town-wide standard will be followed.

15-350(m):

Consider use of low glare outdoor lighting to minimize light pollution.



Town of Carrboro

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

Agenda Item Abstract

File Number:19-128

Agenda Date: 4/9/2019

File Type:Agendas

In Control: Board of Aldermen

Version: 1

TITLE:

Review and Acceptance of the 2019 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 2019 report for review. The Board of Commissioners has requested comments from partner local governments by April 22nd. A resolution that accepts the report has been attached. The Board may choose to attach comments if desired.

DEPARTMENT: Planning

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

INFORMATION: The letter from Chair Penny Rich, of the Board of County Commissioners requesting Board of Aldermen review of the 2019 Draft Annual Report on the Schools Adequate Public Facilities Ordinance (SAPFO) Technical Advisory Committee was received on March 25th. The transmittal included an executive summary of the report and copy of the BOCC's agenda abstract from March 19th (*Attachment B*). The full report is attached (*Attachment C*) and may also be found on Orange County's Planning Department website at the following link: <https://www.orangecountync.gov/departments/1722/Current-Interest-Projects>. Annual reporting requirements of the SAPFO are spelled out in Section 1D of the Memorandum of Understanding (MOU). The annual 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. 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 not show a need for new additional capacity at the elementary, middle, or high school levels within the 10-year planning period. Work to renovate and expand existing CHCCS facilities continue. Within the district, the total number of students increased by 54 students as a result of 51 fewer elementary students, 100 more middle school students and 5 more high school students. The total school population in the 2018-19 school year is 12,336. Level of Service for the three school levels is summarized below:

Elementary. The student population does not exceed 105 percent LOS standard (current LOS is 96.6 percent). Projections do not show the need for an additional Chapel Hill/Carrboro Elementary School in the 10 year

projection period.

Middle School. The student population does not currently exceed 107 percent LOS standard (current LOS is 99.6 percent). Projections do not show the need for an additional Chapel Hill/Carrboro Middle School in the 10-year projection period.

High School. The student population does not currently exceed the 110 percent LOS standard (current LOS is 101.5 percent). Renovations underway at Chapel Hill High School will result in an increase in capacity of 105 seats for the 2020-2021 school year. The need for additional capacity at the high school level is not anticipated in the 10-year projection period.

Student Projection Analysis. Projected average annual growth rates at the elementary and middle school levels have decreased slightly, but remain positive. Future growth rates show decreasing rates of growth at the elementary, middle school and high school levels.

Other Considerations. 2017 legislation established new student class sizes for kindergarten to third grade. House Bill 90 includes a staggered implementation of the reduction, to be completed by 2021-2022, as follows:

School Year	Ratio of classrooms to # of students
2019-2020	1:19
2020 - 2021	1:18
2021-2022	1:17

These changes in classroom size are projected to result in capacity issues for the 2021-2022 school year. The Schools Joint Action Committee is meeting to consider options and incorporation of the changes into the student membership and building capacity projections. This year's draft report notes the increase in multi-family residential projects in the district, especially in the Town of Chapel Hill. Proposed growth is not included in the SAPFO projection process until actual student enrollment occurs and certificates of adequate public facilities are required during the review process for new developments. Staff continue to monitor the growth and associated demand in relation to student membership rates. The report also includes information regarding charter schools and other alternative schooling arrangements as the schools are monitored in relation to effects on student enrollment in both districts. For funding purposes, the North Carolina Department of Public Instruction provides pupil information from such schools to Orange County. Information on charter schools related to Orange County Schools is provided on page 33 of the report.

The Adequate Public School Facilities provisions, Land Use Ordinance subsections 15-88 through 15-88.7, and the associated memorandum of understanding is provided as information (*Attachment D*). A memo providing the status of CAPS for approved residential developments is included as *Attachment E*.

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

RECOMMENDATION: Staff recommends that the Board of Aldermen adopt the attached resolution that accepts the report. The Board may choose to attach comments if desired.

ATTACHMENT A

The following resolution was introduced by Aldermen _____ and duly seconded by Aldermen _____.

A RESOLUTION ACCEPTING THE SCHOOLS ADEQUATE PUBLIC FACILITIES TECHNICAL ADVISORY COMMITTEE (SAPFOTAC) 2019 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 review.

NOW, THEREFORE BE IT RESOLVED that the Board of Aldermen of the Town of Carrboro accepts the report.

This the 9th day of April in the year 2019.

PENNY RICH, CHAIR
RENEE PRICE, VICE CHAIR
JAMEZETTA BEDFORD
MARK DOROSIN
SALLY GREENE
MARK MARCOPLOS
EARL MCKEE

Orange County Board of Commissioners
Post Office Box 8181
200 South Cameron Street
Hillsborough, North Carolina 27278



March 20, 2019

Pam Hemminger, Mayor
Town of Chapel Hill
405 Martin Luther King Jr. Blvd.
Chapel Hill, NC 27514

Brenda Stephens, 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

Joal Broun, Vice 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 2019 Annual SAPFOTAC Report. In accordance with the SAPFO Memoranda of Understanding (MOU), the Board of County Commissioners (BOCC) approved the November 15, 2018 actual membership and capacity numbers for Orange County Schools and Chapel Hill – Carrboro City Schools at its meeting on December 11, 2018.

The SAPFOTAC, comprised of representatives of both school systems and the Planning Directors of the County and Towns has produced the 2019 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 2019 Executive Summary and the March 19, 2019 BOCC meeting agenda item abstract when the BOCC received the draft report.

The full draft SAPFOTAC report is available on the Orange County Planning Department website in the Current Interest Projects section at the following link: <https://www.orangecountync.gov/1722/Current-Interest-Projects>.

www.orangecountync.gov
Orange County, North Carolina
(919) 245-2130

The 2019 Annual SAPFOTAC Report is scheduled to be certified by the BOCC at a regular meeting in May 2019. 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 22, 2019**. Mr. Benedict can be reached by phone at (919) 245-2592 or by e-mail at cbenedict@orangecountync.gov. Any comments received will be part of our agenda package in May.

Please share this information and the 2019 SAPFOTAC report with your respective boards.

Sincerely,



Penny Rich
Chair

Enclosures

cc: Board of County Commissioners

Bonnie Hammersley, Orange County Manager
Travis Myren, Deputy Orange County Manager
Maurice Jones, Manager, Town of Chapel Hill
David Andrews, Manager, Town of Carrboro
Eric Peterson, Manager, Town of Hillsborough
Pamela Baldwin, Superintendent, Chapel Hill-Carrboro City Schools
Todd Wirt, Superintendent, Orange County Schools
Patrick Abele, Assistant Superintendent for Support Services, Chapel Hill-Carrboro City Schools
Catherine Mau, Coordinator for Student Enrollment, Chapel Hill-Carrboro City Schools
Michelle Dodson, Student Assignment and Student Transfers, Orange County Schools
Craig Benedict, Planning Director, Orange County
Ben Hitchings, Planning and Development Services Director, Town of Chapel Hill
Margaret Hauth, Planning Director, Town of Hillsborough
Trish McGuire, Planning Director, Town of Carrboro

**ORANGE COUNTY
BOARD OF COMMISSIONERS
ACTION AGENDA ITEM ABSTRACT
Meeting Date: March 19, 2019**

**Action Agenda
Item No. 8-d**

SUBJECT: Schools Adequate Public Facilities Ordinance (SAPFO) – Receipt and Transmittal of 2019 Annual Technical Advisory Committee Report

DEPARTMENT: Planning and Inspections

ATTACHMENT(S):

1. SAPFO Partners Transmittal Letter
2. Draft 2019 SAPFOTAC Annual Report and Larger Scale Projection Worksheets

INFORMATION CONTACT:

Ashley Moncado, Planner II, 919-245-2589
Craig Benedict, Director, 919-245-2575

PURPOSE: To receive the 2019 Annual Report of the SAPFO Technical Advisory Committee (SAPFOTAC) and transmit it to the SAPFO partners for comments before certification in May.

NOTE: The School Capacity Capital Investment Plan (CIP) Needs Analysis projects no new school capacity needs in the next 10 years for elementary, middle and high school levels for both Orange County Schools (OCS) and Chapel Hill-Carrboro City Schools (CHCCS).

ADDITIONAL NOTE: In 2018, the North Carolina General Assembly unveiled House Bill 90 which allows for a phasing-in process to address the decrease in class size averages over the next three school years. Based on House Bill 90, average class sizes for kindergarten to third grade will be phased-in as provided below:

2019 – 2020	1:19
2020 – 2021	1:18
2021 – 2022	1:17

Reductions in class size averages are expected to create elementary school capacity issues for the 2021-2022 school year. In order to address these impacts in time, the Schools Joint Action Committee (SJAC) continues to meet order to review impacts to both school districts, discuss options, and determine how to implement the school capacity changes into the SAPFO annual report and 10-year student membership and building capacity projections sheets.

ADDITIONAL NOTE: Charter and private schools are not included as part of the SAPFO Annual Report and, as a result, their membership and capacity numbers are not monitored or included in future projections. SAPFO projections are used for projecting only public school capacity needs. However, the SAPFO Technical Advisory Committee does monitor charter and private schools and their effect on student enrollment in both school districts. Charter and private schools numbers are not collected for SAPFO purposes; however, impacts due to enrollment at these schools are accounted for in SAPFO process with the annual reporting of student membership and growth rates contained in the 10-year student projections.

BACKGROUND:

1. Annual Report

Each year, since 2004, 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 level 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 11, 2018 Board of County Commissioners meeting, the Board approved the November 15, 2018 actual membership and capacity numbers (i.e. first part) for both Orange County Schools (OCS) and Chapel Hill-Carrboro City Schools (CHCCS). 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, the Planning Directors of the County and Towns, and County Finance staff, 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 Plan (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 increased from the previous year: 54 students

(51) Elementary School

100 Middle School

5 High School

OCS total decreased from the previous year: 25 students

22 Elementary School

49 Middle School

(96) High School

() denotes decrease

4. Capacity Data

There were no changes to school capacities this year in either school district. Mandated class size changes, discussed in a "Note" on the previous page, are expected to create capacity issues in the 2021-22 school year. Orange County Schools began a capacity reduction process last year in advance. It is suggested that both school districts implement in step to create consistency and timing protocol.

5. Capacity Information

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 mandates 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 should not be reflected in the County's SAPFO. Future decisions would reflect the timing and impact of new state legislation.

This year, CHCCS and OCS did not exceed the adopted level of service standards established in the SAPFO, nor do projections show a potential need for additional capacity at the elementary, middle, and high school levels within the 10-year planning period.

6. Student Projection Analysis

CHCCS

Student membership projections show a mix of increases and decreases at all levels within the 10-year planning period. Projections are shown on page 37 of the report.

OCS

Student membership projections show a mix of increases and decreases at all levels within the 10-year planning period. Projections are shown on page 36 of the report.

The City of Mebane lies partially within Orange County and students within the Orange County portion of Mebane attend Orange County schools. However, Mebane is not a party to the SAPFO agreement and does not require that CAPS be issued prior to development approvals. Although the SAPFO system is not formally regulated in Mebane, students residing within the Orange County portion of Mebane are accounted for in the SAPFO process with the annual reporting of actual student membership and ensuing growth rates contained in the 10-year student projections.

7. School Capacity CIP Needs Analysis

CHCCS

Projected needs:

Elementary School	Projections show no needs in the next 10 years
Middle School	Projections show no needs in the next 10 years
High School	Projections show no needs in the next 10 years

OCS

Projected needs:

Elementary School	Projections show no needs in the next 10 years
Middle School	Projections show no needs in the next 10 years
High School	Projections show no needs in the next 10 years

NOTE: School capacity changes as part of a school renovation/upgrade project will be reviewed as necessary by the BOCC and school districts.

8. Student Generation Rates

The updated student generation rates were approved on May 19, 2015 and are shown in Attachment II.E.1 on page 43 of the report. Updated rates began to be used for CAPS issuances in the fall of 2015 and are based on an inventory of recently built units from January 1, 2004 to December 31, 2013.

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 2019 SAPFOTAC report will be brought back to the BOCC for certification at the May 21, 2019 regular meeting.

10. Additional Information

There are two primary parts to the SAPFO system. The first part, Certificate of Adequate Public Schools (CAPS), is the testing of the student generation rate (SGR) from development projects against available capacity within the schools. The second part, student projections and capacity needs assessment, is the tracking of historical enrollment and the projection of future student enrollment against existing capacity at a certain school level. This part is not directly related to a development project, but a current year outcome of how many children actually 'show up' in a school year. This includes new students that also come from existing housing stock.

The purpose of explaining these two parts of the SAPFO system is to illustrate how projects can be approved as part of the CAPS system when capacity is available yet aberration in actual enrollment can cause future year projections to accelerate capital needs dramatically. The 10-year student projections developed for the SAPFO Annual Report forecast future school needs based on current student membership numbers and historic growth rates derived by the five projection models.

The process accounting for students once they are actually enrolled in the school system emphasizes a delay that exists from the time a residential development is approved and developed to when students begin to enter the system. For example, the proposed residential growth that has occurred in the recent past within Mebane's jurisdiction has yet to be seen with OCS student membership numbers and fully entered into the historically based projection methods. Orange County staff will continue to work with the SAPFO Technical Advisory Committee and our planning partners to monitor future residential development throughout Orange County.

In summary, although the SAPFO Technical Advisory Committee report does not show immediate capital needs, the development approvals in both school districts will, after a normal lag, accelerate capital school needs and renovations based on localized student increases at specific schools. These local impacts will have to be analyzed by the school district to determine the best method to resolve new demands (i.e. redistricting, renovation, new school construction, etc.).

FINANCIAL IMPACT: Current student growth projections do not show capacity needs for additional schools in either the CHCCS District or OCS District during the 10-year projection period. The outcome of the School Joint Action Committee related to state legislation may project more immediate capital needs.

SOCIAL JUSTICE IMPACT: The following Orange County Social Justice Goal is applicable to this item:

- **GOAL: ENSURE ECONOMIC SELF-SUFFICIENCY**

The creation and preservation of infrastructure, policies, programs and funding necessary for residents to provide shelter, food, clothing and medical care for themselves and their dependents.

RECOMMENDATION(S): The Manager recommends the Board:

1. Receive the 2019 SAPFOTAC Annual Report; and
2. Authorize the Chair to sign the transmittal letter to SAPFO partners contained in Attachment 1.

2019 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>	5664	5471	(51)	3361	3205	22
<i>Middle</i>	2944	2933	100	2166	1779	49
<i>High</i>	3875	3932	5	2439	2349	(96)

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 2018-19 School Year – Chapel Hill/Carrboro City Schools

(The first column for each year includes the student membership projection made for 2018-19 in that given year. 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.)

		Year Projection Made for 2018-19 Membership									
	Actual 2018 Membership	2013-2014		2014-2015		2015-2016		2016-2017		2017-2018	
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Middle	2933	3063	H130	3009	H76	2915	L18	2898	L35	2889	L44
High	3932	4011	H79	3920	L12	3842	L90	3846	L86	3915	L17

Analysis of 5 Years of Projections for 2018-19 School Year – Orange County Schools

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Middle	1779	1933	H154	1837	H58	1830	H51	1811	H32	1785	H6
High	2349	2534	H185	2547	H198	2517	H168	2439	H90	2396	H47

D. Student Membership Growth Rate(Change).....Pg. 38

Projected Average Annual Growth Rate Over Next 10 Years										
Year Projection Made:	Chapel Hill/Carrboro School District					Orange County School District				
	2014-15	2015-16	2016-17	2017-18	2018-19	2014-15	2015-16	2016-17	2017-18	2018-19
Elementary	1.11%	0.92%	0.91%	0.36%	0.56%	0.55%	0.80%	0.51%	0.58%	0.91%
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High	1.22%	0.93%	0.72%	0%	0.16%	0.39%	0.56%	0.22%	-0.10%	0.21%

E. Student / Housing Generation Rate(No Change).....Pg. 41

SCHOOL ADEQUATE PUBLIC FACILITIES ORDINANCE STATUS

(based on future year Student Membership Projections)

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Elementary School Level

- Does not currently exceed 105% LOS standard (current LOS is 96.6%).
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High School Level

- Does not currently exceed the 110% LOS standard (current LOS is 101.5%).
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ADDITIONAL INFORMATION

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Currently, there are two Charter Schools located in the Town of Hillsborough. Charter student membership for these two schools is as follows:

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Below is a list of larger residential projects and the potential number of students from these projects which may have impact to the schools in the short term. Please note, a CAPS has not been issued for The Meadows or Villas at Havenstone due to their location in the City of Mebane. 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. As a result, the potential number of students is based on unit type and bedroom count estimates.

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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
2019

(BASED ON NOVEMBER 2018 DATA)

CERTIFIED BY THE BOCC ON MAY X, 2019

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Orange County, NC School Adequate Public Facilities Ordinance

Introduction

The Schools Adequate Public Facilities Ordinance (SAPFO) 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.

Schools Adequate Public Facilities Ordinance Partners

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

**RESPECTFULLY SUBMITTED
TO SCHOOLS ADEQUATE PUBLIC FACILITIES
ORDINANCE PARTNERS**

Chapel Hill/Carrboro School District SAPFO	Orange County School District SAPFO
Board of County Commissioners	Board of County Commissioners
Carrboro Board of Aldermen	Hillsborough Board of Commissioners
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
Ben Hitchings, Planning and Development Services 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
Ashley Moncado, Special Projects Planner
Gary Donaldson, Director of Finance and Administrative Services
131 W. Margaret Lane
P.O. Box 8181
Hillsborough, NC 27278

Orange County School District
Todd Wirt, Superintendent
200 E. King Street
Hillsborough, NC 27278

Chapel Hill-Carrboro School District
Patrick Abele, Assistant Superintendent for Support Services
Catherine Mau, Coordinator of Student Enrollment
750 Merritt Mill Road
Chapel Hill, NC 2751

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 SAPFO 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)].

3. **Standard for:**

Standard for:

Chapel Hill/Carrboro School District

Orange County School District

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

4. **Analysis of Existing Conditions:**

Analysis of Existing Conditions:

Chapel Hill/Carrboro School District

Orange County School District

These standards are acceptable at this time.

These standards are acceptable at this time.

5. **Recommendation:**

Recommendation:

Chapel Hill/Carrboro School District

Orange County School District

No change from above standard.

No change from above standard.

B. Building Capacity and Membership

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:**

Chapel Hill/Carrboro School District

The original certified capacity for each of the schools was certified by the respective superintendent and incorporated in the initialization of the CAPS system (Chapel Hill Carrboro School District April 29, 2002 - Base) Capacity changes were made each year as follows:

2003: Increase of 619 at Rashkis Elementary.

2004: No changes at Elementary, Middle, or High School levels.

2005: No changes at Elementary, Middle, or High

Standard for:

Orange County School District

The original certified capacity for each of the schools was certified by the respective superintendent and incorporated in the initialization of the CAPS system (Orange County School District April 30, 2002 - Base) Capacity changes were made each year as follows:

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

2004: No net increase in capacity at Elementary

Section I

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.

2014: An increase in capacity of 104 students due to the opening of the Culbreth Middle School addition.

2015: No changes at Elementary, Middle, or High School levels.

2016: No changes at Elementary, Middle, or High School levels.

2017: A decrease in capacity of 165 students due to the implementation of the 1:20 class size ratio in grades K-3.

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 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

Section I

2018: No changes at Elementary, Middle or High School levels.

School levels.

2014: No changes at Elementary, Middle, or High School levels.

2015: No changes at Elementary, Middle, or High School levels.

2016: No changes at Elementary, Middle, or High School levels.

2017: A decrease in capacity of 333 students due to the implementation of the 1:20 class size ratio in grades K-3.

2018: No changes at Elementary, Middle, or High School Level.

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 2018-19 capacity is noted on Attachment I.B.4

5. Recommendation:

Chapel Hill/Carrboro School District

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 2018-19 capacity is noted on Attachment I.B.3

Recommendation:

Orange County School District

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

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools

SAPFO CAPS Year: November 15, 2017 - November 14, 2018

Capacity and Membership Submittal Date: November 15, 2017

Elementary School	Square Feet	2013-2014 Requested Capacity	2014-2015 Requested Capacity	2015-2016 Requested Capacity	2016-2017 Requested Capacity	2017-2018 Requested Capacity	Justification Footnote #	Membership
Cameron Park	70,812	565	565	565	565	502		617
Central	52,492	455	455	455	455	428		268
Efland Cheeks	64,316	497	497	497	497	455		411
Grady Brown	74,016	544	544	544	544	490		463
Hillsborough	51,106	471	471	471	471	420		451
New Hope	100,164	586	586	586	586	526		594
Pathways	85,282	576	576	576	576	540		379
Total	498,188	3,694	3,694	3,694	3,694	3,361		3,183

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:


Reduction in class sizes in grades K-3 due to Legislative requirements under House Bill 13.

Capacity Certification:

 11/30/17
 Superintendent Date


 BOCC Chair Date

Membership Certification:

 11/30/17
 Superintendent Date


 BOCC Chair Date

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools

SAPFO CAPS Year: November 15, 2017 - November 14, 2018

Capacity and Membership Submittal Date: November 15, 2017

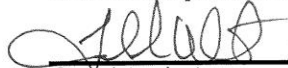
Middle School	Square Feet	2013-2014 Requested Capacity	2014-2015 Requested Capacity	2015-2016 Requested Capacity	2016-2017 Requested Capacity	2017-2018 Requested Capacity	Justification Footnote #	Membership
A.L. Stanback	136,000	740	740	740	740	740		638
C.W. Stanford	107,620	726	726	726	726	726		630
Gravelly Hill	123,000	700	700	700	700	700		462
Total	366,620	2,166	2,166	2,166	2,166	2,166		1,730

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:

 11/21/17
 Superintendent Date

Membership Certification:

 11/21/17
 Superintendent Date


 BOCC Chair Date


 BOCC Chair Date

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools

SAPFO CAPS Year: November 15, 2017 - November 14, 2018

Capacity and Membership Submittal Date: November 15, 2017

High School	Square Feet	2013-2014 Requested Capacity	2014-2015 Requested Capacity	2015-2016 Requested Capacity	2016-2017 Requested Capacity	2017-2018 Requested Capacity	Justification Footnote #	Membership
Orange	213,509	1,399	1,399	1,399	1,399	1,399		1,286
Cedar Ridge	206,900	1,000	1,000	1,000	1,000	1,000		1,116
Partnership	6,600	40	40	40	40	40		43
Total	427,009	2,439	2,439	2,439	2,439	2,439		2,445

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.

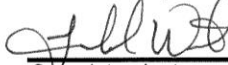
Justification:


Capacity Certification:


 Superintendent 11/21/17
 Date


 BOCC Chair
 Date

Membership Certification:


 Superintendent 11/21/17
 Date


 BOCC Chair
 Date

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools

SAPFO CAPS Year: November 15, 2017 - November 14, 2018

Capacity and Membership Submittal Date: November 15, 2017

Elementary School	Square Feet	2013-2014 Requested Capacity	2014-2015 Requested Capacity	2015-2016 Requested Capacity	2016-2017 Requested Capacity	2017-2018 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Carrboro	60,832	533	533	533	533	518	1	490
Ephesus	66,952	448	448	448	448	436		396
Estes Hills	56,299	527	527	527	527	516		490
Glenwood	50,764	423	538	423	423	412		507
FP Graham	66,689	538	423	538	538	522		597
McDougle	98,000	564	564	564	564	548		531
Rashkis	95,729	585	585	585	585	568		473
Scroggs	90,980	575	585	575	575	558		501
Seawell	52,896	466	585	466	466	450		541
Morris Grove	90,221	585	575	585	585	568		542
Northside	99,500	585	466	585	585	568		454
Total	828,862	5,829	5,829	5,829	5,829	5,664		5,522

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 New class sizes mandated by HB 13 result in a loss of 165 elementary seats.

Capacity Certification:

Pamela Bald 11/27/17
Superintendent Date

[Signature]
BOCC Chair Date

Membership Certification:

Pamela Bald 11/27/17
Superintendent Date

[Signature]
BOCC Chair Date

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools

SAPFO CAPS Year: November 15, 2017 - November 14, 2018

Capacity and Membership Submittal Date: November 15, 2017

Middle School	Square Feet	2013-2014 Requested Capacity	2014-2015 Requested Capacity	2015-2016 Requested Capacity	2016-2017 Requested Capacity	2017-2018 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Culbreth	122,467	670	774	774	774	774		689
McDougle	136,221	732	732	732	732	732		654
Phillips	109,498	706	706	706	706	706		670
Smith	128,764	732	732	732	732	732		820
Total	496,950	2,840	2,944	2,944	2,944	2,944		2,833

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:

Pamela Bala 11/27/17
Superintendent Date

MEDS
BOCC Chair Date

Membership Certification:

Pamela Bala 11/27/17
Superintendent Date

MEDS
BOCC Chair Date

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools
SAPFO CAPS Year: November 15, 2017 - November 14, 2018
Capacity and Membership Submittal Date: November 15, 2017

High School	Square Feet	2013-2014 Requested Capacity	2014-2015 Requested Capacity	2015-2016 Requested Capacity	2016-2017 Requested Capacity	2017-2018 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Chapel Hill	241,111	1,520	1,520	1,520	1,520	1,520		1,563
East Chapel Hill	259,869	1,515	1,515	1,515	1,515	1,515		1,464
Carrboro	148,023	800	800	800	800	800		861
Phoenix Acad.	5,207	40	40	40	40	40		39
Total	654,210	3,875	3,875	3,875	3,875	3,875		3,927

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:

Pamela Bala 11/27/17
Superintendent Date

M. E. S.
BOCC Chair Date

Membership Certification:

Pamela Bala 11/27/17
Superintendent Date

M. E. S.
BOCC Chair Date

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools

SAPFO CAPS Year: November 15, 2018 - November 14, 2019

Capacity and Membership Submittal Date: November 15, 2018


Elementary School	Square Feet	2014-2015 Requested Capacity	2015-2016 Requested Capacity	2016-2017 Requested Capacity	2017-2018 Requested Capacity	2018-2019 Requested Capacity	Justification Footnote #	Membership
Cameron Park	70,812	565	565	565	502	502		597
Central	52,492	455	455	455	428	428		267
Efland Cheeks	64,316	497	497	497	455	455		467
Grady Brown	74,016	544	544	544	490	490		462
Hillsborough	51,106	471	471	471	420	420		435
New Hope	100,164	586	586	586	526	526		589
Pathways	85,282	576	576	576	540	540		388
Total	498,188	3,694	3,694	3,694	3,361	3,361		3,205


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:

 11-16-18
Superintendent Date

Membership Certification:

 11-16-18
Superintendent Date

 12/18/18
BOCC Chair Date

 12/18/18
BOCC Chair Date

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools

SAPFO CAPS Year: November 15, 2018 - November 14, 2019

Capacity and Membership Submittal Date: November 15, 2018

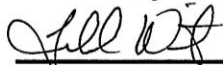
Middle School	Square Feet	2014-2015 Requested Capacity	2015-2016 Requested Capacity	2016-2017 Requested Capacity	2017-2018 Requested Capacity	2018-2019 Requested Capacity	Justification Footnote #	Membership
A.L. Stanback	136,000	740	740	740	740	740		649
C.W. Stanford	107,620	726	726	726	726	726		649
Gravelly Hill	123,000	700	700	700	700	700		481
Total	366,620	2,166	2,166	2,166	2,166	2,166		1,779

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:

 11-16-18
 Superintendent Date

Membership Certification:

 11-16-18
 Superintendent Date

 12/08/18
 BOCC Chair Date

 12/08/18
 BOCC Chair Date

School APFO Capacity, Membership and Change Request Form

School District: Orange County Schools

SAPFO CAPS Year: November 15, 2018 - November 14, 2019

Capacity and Membership Submittal Date: November 15, 2018

High School	Square Feet	2014-2015 Requested Capacity	2015-2016 Requested Capacity	2016-2017 Requested Capacity	2017-2018 Requested Capacity	2018-2019 Requested Capacity	Justification Footnote #	Membership
Orange	213,509	1,399	1,399	1,399	1,399	1,399		1,290
Cedar Ridge	206,900	1,000	1,000	1,000	1,000	1,000		1,018
Partnership	6,600	40	40	40	40	40		41
Total	427,009	2,439	2,439	2,439	2,439	2,439		2,349


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:

 11/16/18
 Superintendent Date

Membership Certification:

 11/16/18
 Superintendent Date


 BOCC Chair Date


 BOCC Chair Date

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools

SAPFO CAPS Year: November 15, 2018 - November 14, 2019

Capacity and Membership Submittal Date: November 15, 2018

Elementary School	Square Feet	2014-2015 Requested Capacity	2015-2016 Requested Capacity	2016-2017 Requested Capacity	2017-2018 Requested Capacity	2018-2019 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Carrboro	60,832	533	533	533	518	518		487
Ephesus	66,952	448	448	448	436	436		440
Estes Hills	56,299	527	527	527	516	516		473
Glenwood	50,764	423	538	423	412	412		484
FP Graham	66,689	538	423	538	522	522		615
McDougle	98,000	564	564	564	548	548		540
Rashkis	95,729	585	585	585	568	568		454
Scroggs	90,980	575	585	575	558	558		470
Seawell	52,896	466	585	466	450	450		503
Morris Grove	90,221	585	575	585	568	568		555
Northside	99,500	585	466	585	568	568		450
Total	828,862	5,829	5,829	5,829	5,664	5,664		5,471

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:

Pamela Bald 11/21/18
Superintendent Date

Membership Certification:

Pamela Bald 11/20/18
Superintendent Date

Penny Ritt 12/18/18
BOCC Chair Date

Penny Ritt 12/18/18
BOCC Chair Date

School APFO Capacity, Membership and Change Request Form

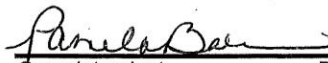
School District: Chapel Hill-Carrboro City Schools
SAPFO CAPS Year: November 15, 2018 - November 14, 2019
Capacity and Membership Submittal Date: November 15, 2018

Middle School	Square Feet	2014-2015 Requested Capacity	2015-2016 Requested Capacity	2016-2017 Requested Capacity	2017-2018 Requested Capacity	2018-2019 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Culbreth	122,467	670	774	774	774	774		736
McDougle	136,221	732	732	732	732	732		683
Phillips	109,498	706	706	706	706	706		654
Smith	128,764	732	732	732	732	732		860
Total	496,950	2,840	2,944	2,944	2,944	2,944		2,933

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.

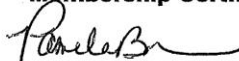
Justification:

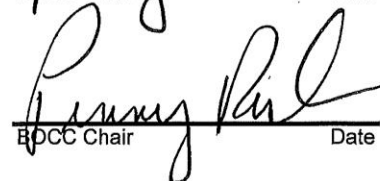
Capacity Certification:

 11/26/18
Superintendent Date

 12/18/18
BOCC Chair Date

Membership Certification:

 11/26/18
Superintendent Date

 12/18/18
BOCC Chair Date

School APFO Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools
SAPFO CAPS Year: November 15, 2018 - November 14, 2019
Capacity and Membership Submittal Date: November 15, 2018

High School	Square Feet	2014-2015 Requested Capacity	2015-2016 Requested Capacity	2016-2017 Requested Capacity	2017-2018 Requested Capacity	2018-2019 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Chapel Hill	241,111	1,520	1,520	1,520	1,520	1,520		1,527
East Chapel Hill	259,869	1,515	1,515	1,515	1,515	1,515		1,493
Carrboro	148,023	800	800	800	800	800		877
Phoenix Acad.	5,207	40	40	40	40	40		35
Total	654,210	3,875	3,875	3,875	3,875	3,875		3,932

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:

Barbara Bala 11/26/18
Superintendent Date

Membership Certification:

Barbara Bala 11/26/18
Superintendent Date

Penny Ruff 12/18/18
BOCC Chair Date

Penny Ruff 12/18/18
BOCC Chair Date

C. Membership Date

1. ***Responsible Entity for Suggesting Change*** – Change can be effectuated only by amendment to Memorandum of Understanding (MOU) by all SAPFO 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 November 15 of each year	Standard for: Orange County School District November 15 of each year
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4. ***Analysis of Existing Conditions:***

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

Chapel Hill/Carrboro School District No change at this time.	Recommendation: Orange County School District No change at this time.
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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, 2019.
5. ***Recommendation:***

Not subject to staff review

B. Student Membership 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 Presently, the <u>average of five models</u> 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.	Standard for: Orange County School District
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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 2018-19 school year from the prior year projection.
5. ***Recommendation:***

More than fifteen 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.

STUDENT MEMBERSHIP PROJECTIONS

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

**Orange County School District
School Membership 2017-2018 School Year (November 15, 2017)**

	<u>11/14/16 Actual 2016-17</u>	<u>2017 Report Projection for 2017-18</u>	<u>11/15/17 Actual 2017-18</u>	<u>Change between actual Nov 2016 - Nov 2017</u>
Elementary	3293		3183	-110
<u>Model</u>			<u>Projection is</u>	
T		3335	H152	
OCP		3329	H146	
10C		3213	H30	
5C		3203	H20	
3C		3188	H5	
AVG		3253	H70	
	<u>11/14/16</u>		<u>11/15/17</u>	
Middle	1724		1730	+6
<u>Model</u>			<u>Projection is</u>	
T		1746	H16	
OCP		1744	H14	
10C		1763	H33	
5C		1753	H23	
3C		1750	H20	
AVG		1751	H21	
	<u>11/14/16</u>		<u>11/15/17</u>	
High	2446		2445	-1
<u>Model</u>			<u>Projection is</u>	
T		2477	H32	
OCP		2476	H31	
10C		2472	H27	
5C		2493	H48	
3C		2482	H37	
AVG		2480	H35	
Totals	<u>11/14/16</u>		<u>11/15/17</u>	
Elementary	3293		3183	
Middle	1724		1730	
High	2446		2445	
	7463		7358	-105
<u>Model</u>			<u>Projection is</u>	
T		7558	H200	
OCP		7549	H191	
10C		7448	H90	
5C		7449	H91	
3C		7420	H62	
AVG		7484	H126	

H means High
L means Low

**Orange County School District
School Membership 2017-2018 School Year (November 15, 2017)**

Statistical Findings

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

Elementary School Level

- The projections were all high, ranging from 5 students to 152 students above actual membership. On average, the projections were 70 students higher than the actual membership.
- The membership actually decreased by 110 students between November 15, 2016 and November 15, 2017.

Middle School Level

- The projections were all high, ranging from 14 students to 33 students above actual membership. On average, the projections were 21 students higher than the actual membership.
- The membership actually increased by 6 students between November 15, 2016 and November 15, 2017.

High School Level

- Projections were all high, ranging from 27 to 48 students above actual membership. On average, the projections were 35 students higher than the actual membership.
- The membership actually decreased by 1 student between November 15, 2016 and November 15, 2017.

TOTAL

- The totals of all school level projections were all high, ranging from 62 to 200 students above actual membership. On average, the projections were 126 students higher than the actual membership.
- The membership decreased in total by 105 students, which is the sum of -110 at Elementary, +6 at Middle, and -1 at High.

Chapel Hill/Carrboro School District
School Membership 2017-2018 School Year (November 15, 2017)

	11/14/16 Actual 2016-17	2017 Report Projection for 2017-18	11/15/17 Actual 2017-18	Change between actual Nov 2016 - Nov 2017
Elementary	5567		5522	-45
<u>Model</u>			<u>Projection is</u>	
T		5641	H119	
OCP		5632	H110	
10C		5599	H77	
5C		5580	H58	
3C		5575	H53	
AVG		5605	H83	
	<u>11/14/16</u>		<u>11/15/17</u>	
Middle	2829		2833	+4
<u>Model</u>			<u>Projection is</u>	
T		2867	H34	
OCP		2893	H60	
10C		2844	H11	
5C		2822	L11	
3C		2807	L26	
AVG		2847	H14	
	<u>11/14/16</u>		<u>11/15/17</u>	
High	3762		3927	+165
<u>Model</u>			<u>Projection is</u>	
T		3812	L115	
OCP		3812	L115	
10C		3850	L77	
5C		3848	L79	
3C		3839	L88	
AVG		3832	L95	
Totals	<u>11/14/16</u>		<u>11/15/17</u>	
Elementary	5567		5522	
Middle	2829		2833	
High	<u>3762</u>		<u>3927</u>	
	12,158		12,282	+124
<u>Model</u>			<u>Projection is</u>	
T		12,320	H38	
OCP		12,337	H55	
10C		12,293	H11	
5C		12,250	L32	
3C		12,221	L61	
AVG		12,284	H2	

H means High
L means Low

**Chapel Hill/Carrboro School District
School Membership 2017-2018 School Year (November 15, 2017)**

Statistical Findings

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

Elementary School Level

- Projections were all high ranging from 53 students to 119 students above actual membership. On average, the projections were 83 students higher than the actual membership.
- The actual membership decreased by 45 students between November 15, 2016 and November 15, 2017.

Middle School Level

- Projections were mixed, ranging from 26 students below to 60 students above actual membership. On average, the projections were 14 students higher than the actual membership.
- The actual membership increased by 4 students between November 15, 2016 and November 15, 2017.

High School Level

- Projections were all low, ranging from 77 to 115 students below actual membership. On average, the projections were 95 students lower than the actual membership.
- The actual membership increased by 165 students between November 15, 2016 and November 15, 2017.

TOTAL

- The total of all school level projections were mixed, ranging from 61 students below to 55 students above actual membership. On average, the projections were 2 students higher than the actual membership.
- The membership increased in total by 124 students, which is the sum of -45 at Elementary, +4 at Middle, and +165 at High.

Orange County School District
School Membership 2018-2019 School Year (November 15, 2018)

	11/15/17 Actual 2017-18	2018 Report Projection for 2018-19	11/15/18 Actual 2018-19	Change between actual Nov 2017 - Nov 2018
Elementary	3183		3205	+ 22
<u>Model</u>			<u>Projection is</u>	
T		3201	L4	
OCP		3200	L5	
10C		3140	L65	
5C		3128	L77	
3C		3139	L66	
AVG		3161	L44	
	<u>11/14/17</u>		<u>11/15/18</u>	
Middle	1730		1779	+ 49
<u>Model</u>			<u>Projection is</u>	
T		1740	L39	
OCP		1739	L40	
10C		1822	H43	
5C		1812	H33	
3C		1814	H35	
AVG		1785	H6	
	<u>11/14/17</u>		<u>11/15/18</u>	
High	2445		2349	- 96
<u>Model</u>			<u>Projection is</u>	
T		2458	H109	
OCP		2460	H111	
10C		2354	H5	
5C		2368	H19	
3C		2340	L9	
AVG		2396	H47	
Totals	<u>11/14/17</u>		<u>11/15/18</u>	
Elementary	3183		3205	
Middle	1730		1779	
High	<u>2445</u>		<u>2349</u>	
	7358		7333	- 25
<u>Model</u>			<u>Projection is</u>	
T		7399	H66	
OCP		7399	H66	
10C		7316	L17	
5C		7308	L25	
3C		7293	L40	
AVG		7342	H9	

H means High
L means Low

**Orange County School District
School Membership 2018-2019 School Year (November 15, 2018)**

Statistical Findings

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

Elementary School Level

- The projections were all low, ranging from 4 students to 77 students below actual membership. On average, the projections were 44 students lower than the actual membership.
- The membership actually increased by 22 students between November 16, 2017 and November 15, 2018.

Middle School Level

- Projections were mixed, ranging from 40 students below to 43 students above actual membership. On average, the projections were 6 students higher than the actual membership.
- The membership actually increased by 49 students between November 16, 2017 and November 15, 2018.

High School Level

- The majority of projections were high, ranging from 5 students to 111 students above actual membership. One projection was 9 students below actual membership. On average, the projections were 47 students higher than the actual membership.
- The membership actually decreased by 96 students between November 16, 2017 and November 15, 2018.

TOTAL

- The totals of all school level projections were mixed, ranging from 40 students below to 66 students above actual membership. On average, the projections were 9 students higher than the actual membership.
- The membership decreased in total by 25 students, which is the sum of +22 at Elementary, +49 at Middle, and -96 at High.

**Chapel Hill/Carrboro School District
School Membership 2018-2019 School Year (November 15, 2018)**

	11/15/17 Actual 2017-18	2018 Report Projection for 2018-19	11/15/18 Actual 2018-19	Change between actual Nov 2017 - Nov 2018
Elementary	5522		5471	- 51
<u>Model</u>			<u>Projection is</u>	
T		5556	H85	
OCP		5541	H70	
10C		5496	H25	
5C		5475	H4	
3C		5479	H8	
AVG		5509	H38	
	<u>11/14/17</u>		<u>11/15/18</u>	
Middle	2833		2933	+ 100
<u>Model</u>			<u>Projection is</u>	
T		2850	L83	
OCP		2848	L85	
10C		2926	L7	
5C		2907	L26	
3C		2915	L18	
AVG		2889	L44	
	<u>11/14/17</u>		<u>11/15/18</u>	
High	3927		3932	+ 5
<u>Model</u>			<u>Projection is</u>	
T		3951	H19	
OCP		3938	H6	
10C		3884	L48	
5C		3889	L43	
3C		3912	L20	
AVG		3915	L17	
Totals	<u>11/14/17</u>		<u>11/15/18</u>	
Elementary	5522		5471	
Middle	2833		2933	
High	<u>3927</u>		<u>3932</u>	
	12,282		12,336	+ 54
<u>Model</u>			<u>Projection is</u>	
T		12,357	H21	
OCP		12,327	L9	
10C		12,306	L30	
5C		12,271	L65	
3C		12,306	L30	
AVG		12,313	L23	

H means High
L means Low

**Chapel Hill/Carrboro School District
School Membership 2018-2019 School Year (November 15, 2018)**

Statistical Findings

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

Elementary School Level

- Projections were all high ranging from 4 students to 85 students above actual membership. On average, the projections were 38 students higher than the actual membership.
- The actual membership decreased by 51 students between November 16, 2017 and November 15, 2018.

Middle School Level

- Projections were all low, ranging from 7 students to 85 students below actual membership. On average, the projections were 44 students lower than the actual membership.
- The actual membership increased by 100 students between November 16, 2017 and November 15, 2018.

High School Level

- Projections were mixed, ranging from 48 students below to 19 students above actual membership. On average, the projections were 17 students lower than the actual membership.
- The actual membership increased by 5 students between November 16, 2017 and November 15, 2018.

TOTAL

- The majority of all school level projections were low, ranging from 9 students to 65 students below actual membership. One projection was 21 students above the actual membership. On average, the projections were 23 students lower than the actual membership.
- The membership increased in total by 54 students, which is the sum of -51 at Elementary, +100 at Middle, and +5 at High.

C. Student Membership 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 City School District and Orange County School District).

3. **Standard for:**

Standard for:

Chapel Hill Carrboro School District

Orange County School District

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

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

See Attachment II.C.4

See Attachment II.C.3

4. **Analysis of Existing Conditions**

The membership figures and percentage growth on the attachments show a decrease at the Chapel Hill/Carrboro City Schools' elementary school level and at the Orange County Schools' high school level. The attachments show an increase at the Chapel Hill/Carrboro City Schools' middle and high school levels and Orange County Schools' elementary and middle school levels. Chapel Hill/Carrboro Schools and Orange County Schools projected average annual growth rates have all decreased since the previous year. The projected annual growth rates show positive growth for all three levels in the 10-year projection period. Attachment II.C.3 and Attachment II.C.4 show year by year percent growth and projected level of service (LOS). The projection models were updated using current (November 15, 2018) memberships. Ten years of student membership were projected thereafter.

Chapel Hill/Carrboro School District

Elementary

The previous year (2017-18) projections for November 2018 at this level were overestimated by 38 students. The actual membership decreased by 51 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 experienced an increase each year with a significant jump (168 students) in 2011-12 before experiencing a decrease in 2014-15, 2015-16, 2017-18, and this school year. Growth rates during the past ten years have ranged from -1.57% to +3.17%. The district's eleventh elementary school, Northside Elementary School, opened in 2013. Capacity was decreased in 2017-18 due to changes in class size averages for kindergarten to third grade by the North Carolina State Legislature. The need for an additional elementary school is not anticipated in the 10-year projection period. This is similar to 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 (2017-18) projections for November 2018 for this level were underestimated by 44 students. The actual membership increased by 100 students. Over the previous ten years, this level has shown varying increases before experiencing a decrease in 2015-16 and 2016-17. Growth rates during this time period have ranged from -0.59% to +2.86%. Capacity was increased in 2014 with the opening of the Culbreth Middle School science wing. The need for an additional middle school is not anticipated in the 10-year projection period. This is similar to last year's projections.

High School

The previous year (2017-18) projections for November 2018 for this level were underestimated by 17 students. The actual membership increased by 5 students. Over the previous ten years, change has been variable with decreases in membership in five of the ten years. Growth rates

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during this time period have ranged from -0.90 to +4.39%. The need for additional high school capacity at Carrboro High School is not anticipated in the 10-year projection period. This is similar to last year's projections. Due to renovations to Chapel Hill High School, this level will experience an increase in capacity of 105 seats for the 2020-21 school year.

Additional Information for Chapel Hill/Carrboro School District

Following the economic downturn, there has been an increase in residential projects, specifically multifamily development, in the Town of Chapel Hill. Currently, there are over four thousand proposed single family and multifamily housing units approved, but undeveloped in the CHCCS district. As previously stated, proposed growth is not included in the SAPFO projection system until actual students begin enrollment. The CAPS test is conducted during the approval process at a certain stage. Once students are enrolled in a school year, through annual reporting of student membership numbers, 10-year student projections can be updated to display future capacity needs in time to efficiently plan for future school construction requests. Staff and the SAPFO Technical Advisory Committee will continue to monitor and evaluate the demand and growth of residential development in Chapel Hill and Carrboro as well as its effect on student membership rates.

Charter schools are not included as part of the SAPFO Annual Report and, as a result, their membership and capacity numbers are not monitored or included in future projections. However, the SAPFO Technical Advisory Committee does monitor charter schools and their effect on student enrollment at both school districts. If a charter school does close and a spike is realized in school enrollment, the student projections will likely accelerate the need in future years, still within an appropriate time for CIP planning. Charter Schools are additionally monitored by the Department of Public Instruction (DPI) which provides pupil information, based on data received from Charter Schools located in Orange County, to the County for funding purposes.

Orange County School District

Elementary

The previous year (2017-18) projections for November 2018 at this level were underestimated by 44 students. Actual membership increased by 22 students. Over the previous ten years, this level experienced positive growth before experiencing decreases in 2014-15, 2016-17, and 2017-18. Growth rates during this period have ranged from -5.07% to +2.30%. In the Orange County

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school system, historic growth is more closely related to new residential development than in the Chapel Hill/Carrboro School District, which has a sizeable number of new families in older, existing housing stock. Capacity was decreased in 2017-18 due to changes in class size averages for kindergarten to third grade by the North Carolina State Legislature. The need for an additional Elementary School is not anticipated in the 10 year projection period. This is similar to 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 (2017-18) projections for November 2018 for this level were overestimated by 6 students. The actual membership increased by 49 students. Over the previous ten years, growth has varied widely and includes decreases in student membership in four of the ten years. Growth rates during this period have ranged from -2.20% 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. This is similar to last year's projections.

High School

The previous year (2017-18) projections for November 2018 for this level were overestimated by 47 students. The actual membership decreased by 96 students. Over the previous ten years, growth has varied and includes decreases for the last three school years and this year. Growth rates during this period ranged from -1.32% to 4.58%. 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. Similar to last year's projections, the need for additional capacity at Cedar Ridge High School is not anticipated in the 10 year projection period. However, to address public safety concerns with the current high school capacity exceeding the 100% threshold, Orange County Schools is in preliminary planning stages to expand Cedar Ridge High School from initial capacity of 1,000 students to 1,500 students for the 2021-22 school year.

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. Following the economic downturn, there has been a slight increase in approved and undeveloped residential development in the City of Mebane and the Town of Hillsborough. Currently, there are over one thousand proposed single family and multifamily housing units approved, but undeveloped in the City of Mebane and the Town of Hillsborough. The residential growth that has occurred in the recent past within Mebane's and Hillsborough's jurisdiction has yet to be seen with OCS student membership numbers and fully realized into the historically based projection methods due to the recession, charter schools, and possibly new family dynamics effecting family size. Staff and the SAPFO Technical Advisory Committee will need to continue monitoring and evaluating the demand and growth of residential development in Mebane and Hillsborough as well as its effect on student membership rates.

Currently, there are two Charter Schools located in the Town of Hillsborough. Eno River Academy (K-12) serves 655 students and The Expedition School (K-8) serves 355 students. Both of these charter schools continue to have an effect on OCS membership numbers. Charter schools are not included as part of the SAPFO Annual Report and, as a result, their membership and capacity are not monitored or included in future projections. However, the SAPFO Technical Advisory Committee does monitor charter schools and their effect on student enrollment at both school districts. If a charter school were to close and a spike were to be realized in school enrollment, the student projections will likely accelerate the need for additional capacity in future years, still within an appropriate time for CIP planning. Charter Schools are also monitored by the Department of Public Instruction (DPI) which provides pupil information, based on data received from Charter Schools located in Orange County, to the County for funding purposes.

5. Recommendation:

Use statistics as noted in 3 above

OCS Student Projections (1) (4)

[illegible][illegible]

9. It is important to note that this reflects the November 15, 2017, 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 2016-19 and average membership for years 2017-18 and average membership for years 2016-19 through 2022-23

4. Class size for grades K-3 = 1:23 for school years 2000 through 2007-08. In accordance with 2006 School Collaboration Week Group direction, effective the 2006-2009 school year with the opening of CHCS 8

OCS Student Projections(1)

[illegible][illegible]

1) It is important to note that this reflects the November 15, 2017 date of membership as outlined in by the School Adequacy Public Finance Ordinance.

2) The Turchier Model provides for the "Linear Math of" projections for both CICC's and CICS. Original projections used in prior years projection models and

3) Annual growth rate calculated using actual membership for years 2016-19 and average membership for years 2016-19 through 2027-28

OCS Student Projections (1)

OCS Student Projections (1)

[illegible][illegible]

(1) It is important to note that this reflects the November 15, 2017 date of membership as outlined in by the Schools Adequate Public Facilities Ordinance.

2) The Turchiari Model provides for the "Linear Method" of projections for both CHCCS and OCSS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHCCS.

20. Annual growth rate calculated using actual membership for years 2017-18 and average membership for years 2018-19 through 2022-23

Attachment II.C.2 – Chapel Hill/Carrboro Student Projections (Elementary, Middle, & High)
(2017-18)

CHCCS Student Projections (1) (4)

Elementary											
School Year	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28
Actual	5,559	5,590	5,624	5,658	5,692	5,725	5,759	5,793	5,827	5,861	
Teacher (2)	5,541	5,568	5,599	5,629	5,673	5,713	5,754	5,790	5,818	5,817	
OC Planning	5,480	5,493	5,502	5,502	5,493	5,482	5,471	5,472	5,472	5,472	
10 Year Growth	5,475	5,506	5,539	5,539	5,533	5,535	5,539	5,542	5,547	5,547	
5 Year Growth	5,470	5,531	5,580	5,575	5,573	5,577	5,581	5,586	5,591	5,591	
Average	5,508	5,467	5,473	5,489	5,504	5,511	5,516	5,526	5,532	5,533	
Annual Change - Increase (Decrease) in Actual & Projected Membership	153	129	63	77	168	79	11	143	47	44	42
Capacity - 100% Level of Service (LOS)	4,921	5,244	5,244	5,244	5,820	5,820	5,820	5,824	5,824	5,824	
Number of Students Actual and Projected Over (Under) 100% LOS	252	86	26	52	220	299	276	329	329	329	89
Capacity - 105% Level of Service (LOS)	5,167	5,506	5,506	5,506	5,506	6,120	6,120	6,120	5,847	5,847	5,847
Number of Students Actual and Projected Over (Under) 105% LOS	6	204	297	210	140	37	660	670	670	670	224
Actual - % Level of Service	105.1%	101.1%	99.5%	101.0%	104.3%	105.1%	95.3%	94.6%	97.5%		
Average - % Level of Service	105.1%	101.1%	99.5%	101.0%	104.3%	105.1%	95.3%	94.6%	97.5%		
Annual Student Growth Rate (g)	3.86%	2.49%	1.51%	1.46%	3.73%	3.77%	1.46%	3.77%	3.77%	3.77%	0.76%

Per November 15, 2005 Certified Capacity Calculations, OHQOS projects Elementary #10 opening for school year 2006-09. In accordance with BOCC adopted School Construction Standards, elementary school capacity totals 500 students.

¹⁰ It is important to note that this article has its number 16, 2017 date of membership as outlined in by the School Adequacy Public Justice Coalition. It does not include CHCS students attending the Hospital School.

② The Teacher Model provides for the "Linear Method" of projections for both CHCS and CCS. Original projections used a five years projection inside and

4. Class size for grades K-3 = 1:22 for school year 2000 through 2007-08. In accordance with 2008 School Collaboration Work Group direction, effective the 2008-2009 school year with the opening of CHC's Elementary #10, K-3 class size are 1:21 as directed by part 81.06 legislative action.

Capacity decrease due to change in class size ratios per House Bill 13 (K-3 average class size ratios are 1:20 as directed by State legislative action)

CHCCS Student Projections (1)

Middle	School Year	2007-08																2008-09																2009-10																2010-11																2011-12																2012-13																2013-14																2014-15																2015-16																2016-17																2017-18																2018-19																2019-20																2020-21																2021-22																2022-23																2023-24																2024-25																2025-26																2026-27																2027-28																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																				
		Actual				2007-08				2008-09				2009-10				2010-11				2011-12				2012-13				2013-14				2014-15				2015-16				2016-17				2017-18				2018-19				2019-20				2020-21				2021-22				2022-23				2023-24				2024-25				2025-26				2026-27				2027-28																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																
		2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000	1999	1998	1997	1996	1995	1994	1993	1992	1991	1990	1989	1988	1987	1986	1985	1984	1983	1982	1981	1980	1979	1978	1977	1976	1975	1974	1973	1972	1971	1970	1969	1968	1967	1966	1965	1964	1963	1962	1961	1960	1959	1958	1957	1956	1955	1954	1953	1952	1951	1950	1949	1948	1947	1946	1945	1944	1943	1942	1941	1940	1939	1938	1937	1936	1935	1934	1933	1932	1931	1930	1929	1928	1927	1926	1925	1924	1923	1922	1921	1920	1919	1918	1917	1916	1915	1914	1913	1912	1911	1910	1909	1908	1907	1906	1905	1904	1903	1902	1901	1900	1899	1898	1897	1896	1895	1894	1893	1892	1891	1890	1889	1888	1887	1886	1885	1884	1883	1882	1881	1880	1879	1878	1877	1876	1875	1874	1873	1872	1871	1870	1869	1868	1867	1866	1865	1864	1863	1862	1861	1860	1859	1858	1857	1856	1855	1854	1853	1852	1851	1850	1849	1848	1847	1846	1845	1844	1843	1842	1841	1840	1839	1838	1837	1836	1835	1834	1833	1832	1831	1830	1829	1828	1827	1826	1825	1824	1823	1822	1821	1820	1819	1818	1817	1816	1815	1814	1813	1812	1811	1810	1809	1808	1807	1806	1805	1804	1803	1802	1801	1800	1799	1798	1797	1796	1795	1794	1793	1792	1791	1790	1789	1788	1787	1786	1785	1784	1783	1782	1781	1780	1779	1778	1777	1776	1775	1774	1773	1772	1771	1770	1769	1768	1767	1766	1765	1764	1763	1762	1761	1760	1759	1758	1757	1756	1755	1754	1753	1752	1751	1750	1749	1748	1747	1746	1745	1744	1743	1742	1741	1740	1739	1738	1737	1736	1735	1734	1733	1732	1731	1730	1729	1728	1727	1726	1725	1724	1723	1722	1721	1720	1719	1718	1717	1716	1715	1714	1713	1712	1711	1710	1709	1708	1707	1706	1705	1704	1703	1702	1701	1700	1699	1698	1697	1696	1695	1694	1693	1692	1691	1690	1689	1688	1687	1686	1685	1684	1683	1682	1681	1680	1679	1678	1677	1676	1675	1674	1673	1672	1671	1670	1669	1668	1667	1666	1665	1664	1663	1662	1661	1660	1659	1658	1657	1656	1655	1654	1653	1652	1651	1650	1649	1648	1647	1646	1645	1644	1643	1642	1641	1640	1639	1638	1637	1636	1635	1634	1633	1632	1631	1630	1629	1628	1627	1626	1625	1624	1623	1622	1621	1620	1619	1618	1617	1616	1615	1614	1613	1612	1611	1610	1609	1608	1607	1606	1605	1604	1603	1602	1601	1600	1599	1598	1597	1596	1595	1594	1593	1592	1591	1590	1589	1588	1587	1586	1585	1584	1583	1582	1581	1580	1579	1578	1577	1576	1575	1574	1573	1572	1571	1570	1569	1568	1567	1566	1565	1564	1563	1562	1561	1560	1559	1558	1557	1556	1555	1554	1553	1552	1551	1550	1549	1548	1547	1546	1545	1544	1543	1542	1541	1540	1539	1538	1537	1536	1535	1534	1533	1532	1531	1530	1529	1528	1527	1526	1525	1524	1523	1522	1521	1520	1519	1518	1517	1516	1515	1514	1513	1512	1511	1510	1509	1508	1507	1506	1505	1504	1503	1502	1501	1500	1499	1498	1497	1496	1495	1494	1493	1492	1491	1490	1489	1488	1487	1486	1485	1484	1483	1482	1481	1480	1479	1478	1477	1476	1475	1474	1473	1472	1471	1470	1469	1468	1467	1466	1465	1464	1463	1462	1461	1460	1459	1458	1457	1456	1455	1454	1453	1452	1451	1450	1449	1448	1447	1446	1445	1444	1443	1442	1441	1440	1439	1438	1437	1436	1435	1434	1433	1432	1431	1430	1429	1428	1427	1426	1425	1424	1423	1422	1421	1420	1419	1418	1417	1416	1415	1414	1413	1412	1411	1410	1409	1408	1407	1406	1405	1404	1403	1402	1401	1400	1399	1398	1397	1396	1395	1394	1393	1392	1391	1390	1389	1388	1387	1386	1385	1384	1383	1382	1381	1380	1379	1378	1377	1376	1375	1374	1373	1372	1371	1370	1369	1368	1367	1366	1365	1364	1363	1362	1361	1360	1359	1358	1357	1356	1355	1354	1353	1352	1351	1350	1349	1348	1347	1346	1345	1344	1343	1342	1341	1340	1339	1338	1337	1336	1335	1334	1333	1332	1331	1330	1329	1328	1327	1326	1325	1324	1323	1322	1321	1320	1319	1318	1317	1316	1315	1314	1313	1312	1311	1310	1309	1308	1307	1306	1305	1304	1303	1302	1301	1300	1299	1298	1297	1296	1295	1294	1293	1292	1291	1290	1289	1288	1287	1286	1285	1284	1283	1282	1281	1280	1279	1278	1277	1276	1275	1274	1273	1272	1271	1270	1269	1268	1267	1266	1265	1264	1263	1262	1261	1260	1259	1258	1257	1256	1255	1254	1253	1252	1251	1250	1249	1248	1247	1246	1245	1244	1243	1242	1241	1240	1239	1238	1237	1236	1235	1234	1233	1232	1231	1230	1229	1228	1227	1226	1225	1224	1223	1222	1221	1220	1219	1218	1217	1216	1215	1214	1213	1212	1211	1210	1209	1208	1207	1206	1205	1204	1203	1202	1201	1200	1199	1198	1197	1196	1195	1194	1193	1192	1191	1190	1189	1188	1187	1186	1185	1184	1183	1182	1181	1180	1179	1178	1177	1176	1175	1174	1173	1172	1171	1170	1169	1168	1167	1166	1165	1164	1163	1162	1161	1160	1159	1158	1157	1156	1155	1154	1153	1152	1151	1150	1149	1148	1147	1146	1145	1144	1143	1142	1141	1140	1139	1138	1137	1136	1135	1134	1133	1132	1131	1130	1129	1128	1127	1126	1125	1124	1123	1122	1121	1120	1119	1118	1117	1116	1115	1114	1113	1112	1111	1110	1109	1108	1107	1106	1105	1104	1103	1102	1101	1100	1099	1098	1097	1096	1095	1094	1093	1092	1091	1090	1089	1088	1087	1086	1085	1084	1083	1082	1081	1080	1079	1078	1077	1076	1075	1074	1073	1072	1071	1070	1069	1068	1067	1066	1065	1064	1063	1062	1061	1060	1059	1058	1057	1056	1055	1054	1053	1052	1051	1050	1049	1048	1047	1046	1045	1044	1043	1042	1041	1040	1039	1038	1037	1036	1035	1034	1033	1032	1031	1030	1029	1028	1027	1026	1025	1024	1023	1022	1021	1020	1019	1018	1017	1016	1015	1014	1013	1012	1011	1010	1009	1008	1007	1006	1005	1004	1003	1002	1001	1000	999	998	997	996	995	994	993	992	991	990	989	988	987	986	985	984	983	982	981	980	979	978	977	976	975	974	973	972	971	970	969	968	967	966	965	964	963	962	961	960	959	958	957	956	955	954	953	952	951	950	949	948	947	946	945	944	943	942	941	940	939	938	937	936	935	934	933	932	931	930	929	928	927	926	925	924	923	922	921	920	919	918	917	916	915	914	913	912	911	910	909	908	907	906	905	904	903	902	901	900	899	898	897	896	895	894	893	892	891	890	889	888	887	886	885	884	883	882	881	880	879	878	877	876	875	874	873	872	871	870	869	868	867	866	865	864	863	862	861	860	859	858	857	856	855	854	853	852	851	850	849	848	847	846	845	844	843	842	841	840	839	838	837	836	835	834	833	832	831	830	829	828	827	826	825	824	823	822	821	820	819	818	817	816	815	814	813	812	811	810	809	808	807	806	805	804	803	802	801	800	799	798	797	796	795	794	793	792	791	790	789	788	787	786	785	784	783	782	781	780	779	778	777	776	775	774	773	772	771	770	769	768	767	766	765	764	763	762	761	760	759	758	757	756	755	754	753	752	751	750	749	748	747	746	745	744	743	742	741	740	739	738	737	736	735	734	733	732	731	730	729	728	727	726	725	724	723	722	721	720	719	718	717	716	715	714	713	712	711	710	709	708	707	706	705	704	703	702	701	700	699	698	697	696	695	694	693	692	691	690</

[illegible]

CHCCS Student Projections (1)

Additional 104 new seats at Culbreth Middle School

CHCCS Student Projections (1)

[illegible]

¹⁰ It is important to note that this article that November 15, 2017 rate of membership as outlined in by the Schedule Adequacy Public Notice Ordinance. It does not include DRCS students attending the Hospital School.

(19) Annual growth rate calculated using actual membership for years 2010–19 and average membership for years 2010–19 through 2027. (20) The Thrasher Model provides for the “Thrasher Method” of projecting for both CHCCS and OCS. Original projections used in prior year performance models assumed the Thrasher Extrapolation Method for CHCCS.

High School #3 opens in fall 2007 with 800 additional seats

Chapel Hill High School adding 105 seats.

OCS Student Projections (1) (4)

School Year	Elementary																				
	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Actual	3,105	3,211	3,295	3,346	3,403	3,433	3,299	3,318	3,293	3,103	3,205	3,217	3,229	3,241	3,254	3,266	3,278	3,290	3,302	3,314	3,327
Teacher (2)																					
OC Planning																					
10 Year Growth																					
3 Year Growth																					
5 Year Growth																					
Average	3,684	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	3,694	3,694	3,694	3,694
Capacity	3,684	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	3,694	3,694	3,694	3,694
Level of Service	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS	100% LOS
100%+ LOS	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	3,694	3,694	3,694	3,694	3,694
100%+ LOS	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	3,694	3,694	3,694	3,694	3,694
Number of Students	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	3,694	3,694	3,694	3,694	3,694
Actual & Projected	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	3,694	3,694	3,694	3,694	3,694
Level of Service	87.7%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%
Average % Level of Service	87.7%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%	88.3%
Average Student Growth Rate (3)	0.22%	1.45%	2.30%	1.92%	1.64%	0.86%	-6.07%	-1.81%	-0.75%	-3.34%	0.89%	0.23%	1.53%	0.60%	1.31%	1.40%	0.93%	0.83%	0.93%	0.91%	0.79%

[illegible]

- 1) It is important to note that this reflects the November 15, 2018 date of membership as outlined in by the Schools Attlegate Public Facilities Ordinance.
- 2) The Trooper Model provides for the "Linear Method" of projections for both CHCS and OCS. Original projections used in prior years projection models include the "Linear Extrapolation Method" for CHCS.

2) The Fischer Model provides for the "Linear Method" of projections for both CHOCs and OCS. Original projections used in prior years projection models included the "Linear Extrapolation Method" for CHOCs.

(4) Class sizes for grades K-3 = 1:25 for school years 2000 through 2007-08. In accordance with 2005 School C collaboration Work Group direction, effective the 2008-2009 school year with the opening of CHCCS B.

OCS Student Projections(1)

[illegible]

1) It is important to note that this reflects the November 15, 2016 date of membership as outlined in by the Schools Admissions Public Facilities Ordinance.

2) The Toolster Model provides for the "Linear Method" of projections used in prior years projection models included the "Linear Extrapolation Method" for CHCCS.

30. Annual growth rate calculated using actual membership for years 2005-10 and average membership for years 2010-20 through 2025-29.

3) Annual growth rates calculated using actual membership for years 2000-2001

High		School Year	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
College-Ready	Actual	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Projected	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Change	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
	Capacity	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
College-Ready (2)	Actual	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Projected	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Change	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
	Capacity	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
OC Planning	Actual	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Projected	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Change	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
	Capacity	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
10 Year Growth	Actual	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Projected	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Change	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
	Capacity	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
5 Year Growth	Actual	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Projected	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Change	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
	Capacity	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711
	Level of Service	2,441	2,441	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711	2,711</		

1) It is important to note that this reflects the November 15, 2010 date of membership as outlined in by the Schools Adequate Public Facilities Ordinance.

(2) The Teacher Model provides for the "Linear Method" of projections used in prior years projection models included the "Linear Extrapolation Method" for CHCCS.

3) Annual growth rate calculated using actual membership for years 2009-10 through 2018-19 and average membership for years 2019-20 through 2026-29

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Attachment II.C.4 – Chapel Hill/Carrboro Student Projections (Elementary, Middle, & High) (2018-19)

CHCCS Student Projections (1) (4)

School Year	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Actual	5,302	5,219	5,296	5,464	5,543	5,554	5,941	5,901	5,967	5,922	5,471										
Tier 1 (2)																					
DC Planning																					
10 Year Growth																					
5 Year Growth																					
3 Year Growth																					
Average	125	(63)	77	168	79	111	(13)	(47)	66	(45)	(61)	(74)	(4)	30	24	69	49	47	47	45	42
Annual Change - Increase (Decrease) in Actual & Projected Membership																					
Capacity - 100% Level of Service (LOS)	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244	5,244
Number of Students, Actual and Projected, Over (Under) 100% LOS	58	(20)	50	220	298	(70)	(88)	(82)	(82)	(82)	(142)	(150)	(215)	(185)	(185)	(185)	(185)	(185)	(185)	(185)	(185)
Capacity - 105% Level of Service (LOS)	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506	5,506
Number of Students, Actual and Projected, Over (Under) 105% LOS	(204)	(207)	(219)	(142)	37	(66)	(79)	(81)	(83)	(83)	(126)	(176)	(491)	(603)	(473)	(449)	(300)	(241)	(234)	(247)	(220)
Actual % Level of Service	101.1%	99.9%	101.0%	104.2%	105.7%	95.3%	94.4%	94.4%	95.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%
Average % Level of Service	101.1%	99.9%	101.0%	104.2%	105.7%	95.3%	94.4%	94.4%	95.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%	97.7%
Annual Student Growth Rate (3)	2.49%	-1.57%	1.48%	3.17%	1.46%	0.20%	-2.33%	-0.72%	1.20%	-0.81%	-0.92%	0.41%	-0.06%	0.95%	0.49%	1.07%	0.89%	0.84%	0.83%	0.79%	0.74%

(1) In preparation for the 2018-19 school year, the 2018-19 data of membership is adjusted to be the School District's Fall Enrollment. It does not include CHCCS students attending the regional school.

(2) The "Tier 1" data is provided for the "Class Model" of projections for both CHCCS and CHCCS. Digital projections used in prior year projections included the "Class Model" of projections for CHCCS.

(3) Annual growth rate calculated using actual membership for year 2008-09 through 2018-19 and average membership for year 2019-20 through 2028-29.

(4) Actual growth rate calculated using actual membership for year 2008-09 through 2018-19 and average membership for year 2019-20 through 2028-29.

CHCCS Student Projections (1)

School Year	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Actual	2,697	2,709	2,722	2,753	2,765	2,865	2,861	2,844	2,820	2,833	2,833	2,833	2,833	2,833	2,833	2,833	2,833	2,833	2,833	2,833	2,833
Tier 1 (2)																					
DC Planning																					
10 Year Growth																					
5 Year Growth																					
3 Year Growth																					
Average	75	11	14	31	32	73	76	(17)	(15)	(15)	4	100	28	19	(24)	(18)	(65)	250	259	292	298
Annual Change - Increase (Decrease) in Actual & Projected Membership																					
Capacity - 100% Level of Service (LOS)	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840	2,840
Number of Students, Actual and Projected, Over (Under) 100% LOS	(143)	(132)	(118)	(87)	(65)	18	(83)	(100)	(115)	(111)	(111)	18	37	17	(11)	(46)	(98)	(40)	(6)	18	44
Capacity - 105% Level of Service (LOS)	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038	3,038
Number of Students, Actual and Projected, Over (Under) 105% LOS	(244)	(231)	(217)	(168)	(144)	(91)	(69)	(90)	(90)	(91)	(91)	(91)	(91)	(91)	(91)	(91)	(91)	(91)	(91)	(91)	(91)
Actual % Level of Service	94.0%	94.6%	95.2%	96.2%	96.2%	100.2%	97.2%	96.2%	96.1%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%
Average % Level of Service	94.0%	94.6%	95.2%	96.2%	96.2%	100.2%	97.2%	96.2%	96.1%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%	96.2%
Annual Student Growth Rate (3)	2.89%	0.41%	0.52%	1.14%	1.18%	2.62%	0.10%	-0.59%	-0.53%	0.14%	3.53%	0.97%	0.83%	0.89%	-0.89%	-1.52%	0.21%	0.04%	1.24%	0.79%	0.85%

(1) In preparation for the 2018-19 school year, the 2018-19 data of membership is adjusted to be the School District's Fall Enrollment. It does not include CHCCS students attending the regional school.

(2) The "Tier 1" data is provided for the "Class Model" of projections for both CHCCS and CHCCS. Digital projections used in prior year projections included the "Class Model" of projections for CHCCS.

(3) Annual growth rate calculated using actual membership for year 2008-09 through 2018-19 and average membership for year 2019-20 through 2028-29.

CHCCS Student Projections (1)

School Year	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Actual	3,830	3,830	3,840	3,714	3,799	3,764	3,720	3,701	3,762	3,727	3,923	3,982	3,981	4,021	4,051	4,080	4,110	4,140	4,169	4,199	4,229
Tier 1 (2)																					
DC Planning																					
10 Year Growth																					
5 Year Growth																					
3 Year Growth																					
Average	6	(24)	34	74	82	(20)	(65)	(26)	61	165	5	15	24	9	55	49	108	108	108	108	108
Annual Change - Increase (Decrease) in Actual & Projected Membership																					
Capacity - 100% Level of Service (LOS)	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835	3,835
Number of Students, Actual and Projected, Over (Under) 100% LOS	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)
Capacity - 105% Level of Service (LOS)	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029	4,029
Number of Students, Actual and Projected, Over (Under) 105% LOS	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)	(68)
Actual % Level of Service	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%
Average % Level of Service	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%	94.1%
Annual Student Growth Rate (3)	-0.14%	-0.68%	0.94%	2.03%	2.21%	-0.84%	-0.90%	-0.76%	1.65%	4.38%	0.13%	0.40%	0.62%	0.23%	1.49%	1.21%	0.44%	0.24%	-1.27%	-0.95%	0.39%

(1) In preparation for the 2018-19 school year, the 2018-19 data of membership is adjusted to be the School District's Fall Enrollment. It does not include CHCCS students attending the regional school.

(2) The "Tier 1" data is provided for the "Class Model" of projections for both CHCCS and CHCCS. Digital projections used in prior year projections included the "Class Model" of projections for CHCCS.

(3) Annual growth rate calculated using actual membership for year 2008-09 through 2018-19 and average membership for year 2019-20 through 2028-29.

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 10 years.

3. **Standard for:**

Chapel Hill/Carrboro School District

See Attachment II.D.2

4. **Analysis of Existing Conditions:**

Chapel Hill/Carrboro School District

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:

Year Projection Made:	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019
Elementary	1.11%	0.92%	0.91%	0.36%	0.56%
Middle	1.15%	0.82%	0.95%	0.21%	0.19%
High	1.22%	0.93%	0.72%	0%	0.16%

Standard for:

Orange County School District

See Attachment II.D.2

Analysis of Existing Conditions:

Orange County School District

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:

Year Projection Made:	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019
Elementary	0.55%	0.80%	0.51%	0.58%	0.91%
Middle	0.09%	0.67%	0.36%	0.13%	0.28%
High	0.39%	0.56%	0.22%	-0.10%	0.21%

5. **Recommendation:**

Chapel Hill/Carrboro School District

Use statistics as noted.

Recommendation:

Orange County School District

Use statistics as noted.

Attachment II.D.1 – Orange County and Chapel Hill/Carrboro Student Growth Rates
(Chart dates from 2018-2028 based on 11/15/17 membership numbers) (2017-18)

2017-2018

Orange County Student Projections

Elementary

School Year	2017-2018 (actual)	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028
Membership	3,183	3,161	3,154	3,186	3,198	3,228	3,256	3,284	3,312	3,340	3,367
Average % Increase		-0.56%	-0.25%	1.04%	0.35%	0.96%	0.86%	0.86%	0.86%	0.83%	0.81%

Middle

School Year	2017-2018 (actual)	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028
Membership	1,730	1,785	1,794	1,730	1,709	1,682	1,701	1,697	1,717	1,733	1,749
Average % Increase		3.19%	0.50%	-3.60%	-1.21%	-1.56%	1.14%	-0.25%	1.20%	0.92%	0.92%

High School

School Year	2017-2018 (actual)	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028
Membership	2,445	2,396	2,416	2,456	2,474	2,517	2,480	2,448	2,410	2,396	2,419
Average % Increase		-2.01%	0.84%	1.66%	0.74%	1.72%	-1.48%	-1.27%	-1.58%	-0.54%	0.93%

Chapel Hill/Carrboro Student Projections

Elementary

School Year	2017-2018 (actual)	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028
Membership	5,522	5,509	5,467	5,473	5,488	5,504	5,551	5,596	5,641	5,683	5,723
Average % Increase		-0.23%	-0.77%	0.10%	0.27%	0.30%	0.86%	0.80%	0.81%	0.75%	0.70%

Middle

School Year	2017-2018 (actual)	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028
Membership	2,833	2,889	2,936	2,929	2,924	2,881	2,863	2,854	2,846	2,868	2,892
Average % Increase		1.98%	1.61%	-0.24%	-0.17%	-1.44%	-0.65%	-0.31%	-0.26%	0.76%	0.84%

High School

School Year	2017-2018 (actual)	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028
Membership	3,927	3,915	3,930	3,933	3,934	4,028	4,024	4,009	4,004	3,941	3,926
Average % Increase		-0.31%	0.38%	0.07%	0.03%	2.41%	-0.10%	-0.39%	-0.11%	-1.59%	-0.38%

Attachment II.D.2 – Orange County and Chapel Hill/Carrboro Student Growth Rates
(Chart dates from 2019-2029 based on 11/15/18 membership numbers) (2018-19)

2018-2019

Orange County Student Projections

Elementary

School Year	2018-2019 (actual)	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029
Membership	3,205	3,213	3,262	3,278	3,321	3,367	3,395	3,424	3,452	3,480	3,508
Average % Increase		0.23%	1.53%	0.50%	1.31%	1.40%	0.83%	0.83%	0.83%	0.81%	0.79%

Middle

School Year	2018-2019 (actual)	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029
Membership	1,779	1,790	1,737	1,731	1,710	1,728	1,729	1,758	1,795	1,811	1,827
Average % Increase		0.60%	-2.93%	-0.36%	-1.19%	1.03%	0.08%	1.65%	2.09%	0.89%	0.89%

High School

School Year	2018-2019 (actual)	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029
Membership	2,349	2,348	2,371	2,388	2,426	2,396	2,390	2,363	2,346	2,386	2,397
Average % Increase		-0.05%	1.00%	0.71%	1.59%	-1.24%	-0.26%	-1.14%	-0.72%	1.70%	0.48%

Chapel Hill/Carrboro Student Projections

Elementary

School Year	2018-2019 (actual)	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029
Membership	5,471	5,448	5,444	5,474	5,498	5,557	5,606	5,653	5,700	5,745	5,787
Average % Increase		-0.41%	-0.08%	0.55%	0.43%	1.07%	0.89%	0.84%	0.83%	0.78%	0.74%

Middle

School Year	2018-2019 (actual)	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029
Membership	2,933	2,962	2,981	2,961	2,943	2,898	2,905	2,904	2,939	2,962	2,988
Average % Increase		0.97%	0.65%	-0.68%	-0.60%	-1.52%	0.21%	-0.04%	1.24%	0.78%	0.86%

High School

School Year	2018-2019 (actual)	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029
Membership	3,932	3,948	3,972	3,981	4,037	4,066	4,068	4,058	4,007	3,983	3,995
Average % Increase		0.40%	0.62%	0.23%	1.40%	1.21%	-0.44%	-0.24%	-1.27%	-0.58%	0.30%

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*** – Student generation rate refers to the number of public school students per housing unit constructed in each school district, as defined in the Student Generation Rate Study completed by TisherBise on October 28, 2014. Housing units include single family detached, single family attached/duplex, multifamily, and manufactured homes.
3. ***Standard for:***

Chapel Hill/Carrboro School District See Attachment II.E.1	Standard for: Orange County School District See Attachment II.E.1
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4. ***Analysis of Existing Conditions:***

At the January 2014 SAPFOTAC meeting, members discussed the increased number of students generated in both school districts from new development, particularly multifamily housing. The SAPFOTAC recommended further evaluation of the adopted Student Generation Rates and the impacts the number of bedrooms a particular housing type may have on student generation rates. As a result, Orange County entered into a contract with TischlerBise to update the student generation rate analysis. The new student generation rates were approved on May 19, 2015 and are shown in Attachment II.E.1. New rates from the 2014 Student Generation Rates for Orange County Schools and Chapel Hill-Carrboro School District Report are based on an inventory of recently built units from January 1, 2004 to December 31, 2013.

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

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housing is dominant or new families move into a large inventory of existing housing stock.

5. *Recommendation:*

No change at this time.

Attachment II.E.1 – Current Student Generation Rates (2015)

TischlerBise Student Generation Rates – 2014

Chapel Hill/Carrboro Schools				
	0-3 Bedrooms	4 Bedrooms	5+ Bedrooms	Weighted Average
Single-Family Detached	0.61	0.84	1.13	0.84
	0-2 Bedrooms	3+ Bedrooms		Weighted Average
Single-Family Attached	0.27	0.42		0.38
Multifamily/Other	0.11	0.47		0.18
Manufactured Home	0.268	0.86		0.78
Weight Average for Chapel Hill/Carrboro School District				0.49

Orange County Schools				
	0-3 Bedrooms	4 Bedrooms	5+ Bedrooms	Weighted Average
Single-Family Detached	0.35	0.57	0.57	0.44
	0-2 Bedrooms	3+ Bedrooms		Weighted Average
Single-Family Attached	0.07	0.17		0.15
Multifamily/Other	0.08	0.67		0.17
Manufactured Home	0.67	0.47		0.52
Weight Average for Orange County School District				0.37

Source: Student Generation Rates for Orange County School District and Chapel Hill-Carrboro School District, TischlerBise, October 28, 2014
Revised May 7, 2015

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)

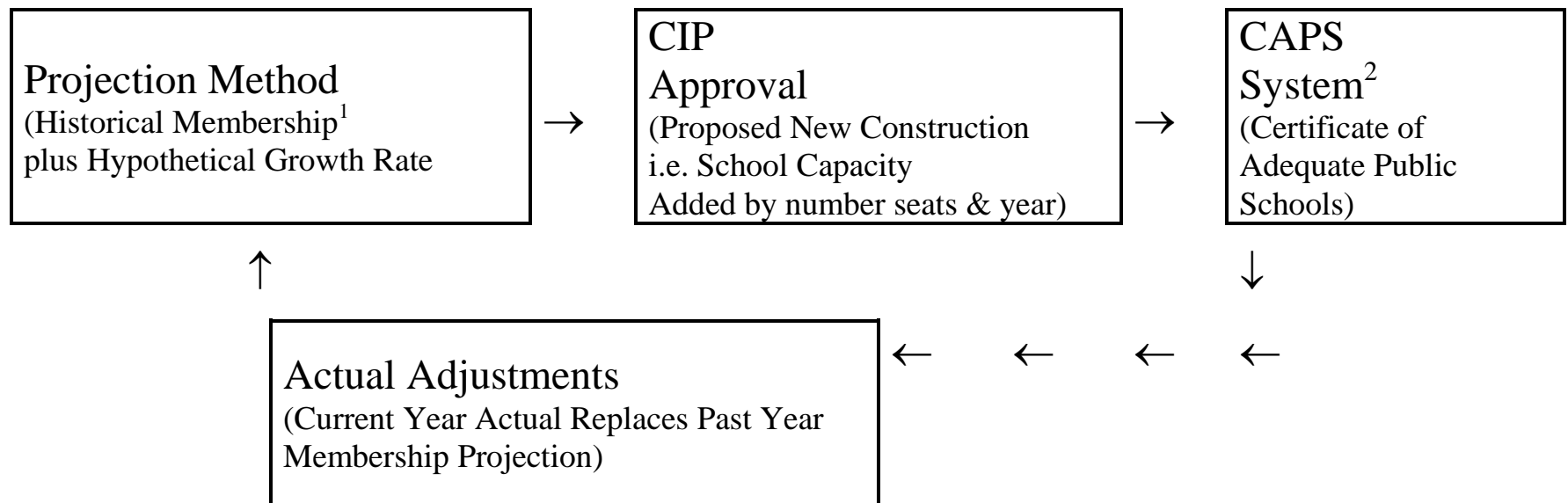
Timeframe: In November of each year, Student Membership and Building Capacity is transmitted from the school districts to the Orange County Board of Commissioners for consideration and approval and used in the following years CIP (e.g. November 15, 2018 membership numbers used to develop a CIP to be considered for adoption in June 2019).

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 SAPFO 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.

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 previously noted 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. Increasing development within this area of the county has the potential to encumber a significant portion of the available capacity within the Orange County School District. 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.

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For example, the SAPFO 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 2019 - 2029)

November 2018 – June 2019 (using 2019 SAPFOTAC Report)

SAPFO CAPS Process 2 (for SAPFO System 2019 – 2020)

November 2018 - November 2019

School Adequate Public Facilities Ordinance

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

2019 CAPS system is effective November 15, 2018 through November 14, 2019.

The system is updated with new membership, CIP capacity changes, and any other BOCC/School District joint action approved capacity prior to November 15, 2018. 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, 2018.

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	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Actual	3,165	3,211	3,285	3,348	3,403	3,433	3,259	3,318	3,293	3,183	3,205										
Tischler (2)												3,217	3,229	3,241	3,254	3,266	3,278	3,290	3,302	3,314	3,327
OC Planning												3,215	3,236	3,259	3,283	3,308	3,334	3,360	3,385	3,407	3,426
10 Year Growth												3,217	3,293	3,314	3,379	3,448	3,482	3,517	3,552	3,588	3,624
5 Year Growth												3,197	3,257	3,265	3,317	3,378	3,412	3,446	3,480	3,515	3,550
3 Year Growth												3,217	3,294	3,311	3,371	3,437	3,471	3,506	3,541	3,577	3,612
Average												3,213	3,262	3,278	3,321	3,367	3,395	3,424	3,452	3,480	3,508
Annual Change - Increase (Decrease) in Actual & Projected Membership)	7	46	74	63	55	30	(174)	59	(25)	(110)	22	8	49	16	43	47	28	28	29	28	27
Capacity - 100% Level of Service	3,694	3,694	3,694	3,694	3,694	3,694	3,694	3,694	3,694	3,361	3,361	3,361	3,361	3,361	3,361	3,361	3,361	3,361	3,361	3,361	3,361
Number of Students, Actual and Projected, Over (Under) 100% LOS	(529)	(483)	(409)	(346)	(291)	(261)	(435)	(376)	(401)	(178)	(156)	(148)	(99)	(83)	(40)	6	34	63	91	119	147
105% Level of Service	3,879	3,879	3,879	3,879	3,879	3,879	3,879	3,879	3,879	3,529	3,529	3,529	3,529	3,529	3,529	3,529	3,529	3,529	3,529	3,529	3,529
Number of Students, Actual and Projected, Over (Under) 105% LOS	(714)	(668)	(594)	(531)	(476)	(446)	(620)	(561)	(586)	(346)	(324)	(317)	(267)	(251)	(208)	(162)	(134)	(105)	(77)	(49)	(21)
Actual - % Level of Service	85.7%	86.9%	88.9%	90.6%	92.1%	92.9%	88.2%	89.8%	89.1%	94.7%	95.4%										
Average - % Level of Service												95.6%	97.0%	97.5%	98.8%	100.2%	101.0%	101.9%	102.7%	103.5%	104.4%
Annual Student Growth Rate (3)	0.22%	1.45%	2.30%	1.92%	1.64%	0.88%	-5.07%	1.81%	-0.75%	-3.34%	0.69%	0.23%	1.53%	0.50%	1.31%	1.40%	0.83%	0.83%	0.83%	0.81%	0.79%

(1) It is important to note that this reflects the November 15, 2018 date of membership as outlined in by the Schools Adequate Public Facilities Ordinan

(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 CHI

(3) Annual growth rate calculated using actual membership for years 2009-10 through 2018-19 and average membership for years 2019-20 through 2028

(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 a

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)

Capacity decrease due to change in class size ratios per House Bill 13 (K-3 average class size ratios are 1:20 as directed by State legislative action)

OCS Student Projections(1)

Middle

School Year	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Actual	1,601	1,665	1,698	1,704	1,684	1,747	1,762	1,739	1,724	1,730	1,779										
Tischler (2)												1,786	1,793	1,799	1,806	1,813	1,820	1,826	1,833	1,840	1,847
OC Planning												1,773	1,775	1,779	1,782	1,786	1,791	1,795	1,822	1,841	1,861
10 Year Growth												1,808	1,726	1,715	1,678	1,706	1,710	1,760	1,815	1,833	1,851
5 Year Growth												1,794	1,700	1,679	1,634	1,652	1,643	1,680	1,725	1,742	1,759
3 Year Growth												1,788	1,693	1,684	1,652	1,683	1,684	1,729	1,779	1,797	1,815
Average												1,790	1,737	1,731	1,710	1,728	1,729	1,758	1,795	1,811	1,827
Annual Change - Increase (Decrease) in Actual & Projected Membership)	(36)	64	33	6	(20)	63	15	(23)	(15)	6	49	11	(52)	(6)	(21)	18	1	29	37	16	16
Capacity - 100% Level of Service	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	2,166	2,166	2,166
Number of Students, Actual and Projected, Over (Under) 100% LOS	(565)	(501)	(468)	(462)	(482)	(419)	(404)	(427)	(442)	(436)	(387)	(376)	(429)	(435)	(456)	(438)	(437)	(408)	(371)	(355)	(339)
107% Level of Service	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	2,318	2,318
Number of Students, Actual and Projected, Over (Under) 107% LOS	(717)	(653)	(620)	(614)	(634)	(571)	(556)	(579)	(594)	(588)	(539)	(528)	(580)	(587)	(607)	(590)	(588)	(560)	(523)	(507)	(491)
Actual - % Level of Service	73.9%	76.9%	78.4%	78.7%	77.7%	80.7%	81.3%	80.3%	79.6%	79.9%	82.1%										
Average - % Level of Service												82.6%	80.2%	79.9%	79.0%	79.8%	79.8%	81.2%	82.9%	83.6%	84.3%
Annual Student Growth Rate (3)	-2.20%	4.00%	1.98%	0.35%	-1.17%	3.74%	0.86%	-1.31%	-0.86%	0.35%	2.83%	0.60%	-2.93%	-0.36%	-1.19%	1.03%	0.08%	1.65%	2.09%	0.89%	0.89%

(1) It is important to note that this reflects the November 15, 2018 date of membership as outlined in by the Schools Adequate Public Facilities Ordinan

(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 CHI

(3) Annual growth rate calculated using actual membership for years 2009-10 through 2018-19 and average membership for years 2019-20 through 2028

OCS Student Projections (1)

High

School Year	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Actual	2,242	2,217	2,222	2,283	2,315	2,421	2,502	2,469	2,446	2,445	2,349										
Tischler (2)												2,358	2,367	2,376	2,385	2,394	2,402	2,411	2,420	2,429	2,438
OC Planning												2,385	2,402	2,420	2,438	2,459	2,479	2,499	2,496	2,504	2,516
10 Year Growth												2,339	2,382	2,419	2,493	2,443	2,432	2,378	2,351	2,420	2,439
5 Year Growth												2,339	2,377	2,399	2,455	2,390	2,361	2,297	2,257	2,305	2,309
3 Year Growth												2,318	2,329	2,327	2,360	2,295	2,276	2,229	2,206	2,270	2,284
Average												2,348	2,371	2,388	2,426	2,396	2,390	2,363	2,346	2,386	2,397
Annual Change - Increase (Decrease) in Actual & Projected Membership)	41	(25)	5	61	32	106	81	(33)	(23)	(1)	(96)	(1)	23	17	38	(30)	(6)	(27)	(17)	40	12
Capacity - 100% Level of Service	2,558	2,558	2,558	2,558	2,439	2,439	2,439	2,439	2,439	2,439	2,439	2,439	2,439	2,939	2,939	2,939	2,939	2,939	2,939	2,939	2,939
Number of Students, Actual and Projected, Over (Under) 100% LOS	(316)	(341)	(336)	(275)	(124)	(18)	63	30	7	6	(90)	(91)	(68)	(551)	(513)	(543)	(549)	(576)	(593)	(553)	(542)
110% Level of Service	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	3,233	3,233	3,233	3,233	3,233	3,233	3,233	3,233
Number of Students, Actual and Projected, Over (Under) 110% LOS	(572)	(597)	(592)	(531)	(368)	(262)	(181)	(214)	(237)	(238)	(334)	(335)	(312)	(845)	(807)	(837)	(843)	(870)	(887)	(847)	(836)
Actual - % Level of Service	87.6%	86.7%	86.9%	89.2%	94.9%	99.3%	102.6%	101.2%	100.3%	100.2%	96.3%										
Average - % Level of Service												96.3%	97.2%	81.3%	82.6%	81.5%	81.3%	80.4%	79.8%	81.2%	81.6%
Annual Student Growth Rate (3)	1.86%	-1.12%	0.23%	2.75%	-1.40%	4.58%	3.35%	-1.32%	-0.93%	-0.04%	-3.93%	-0.05%	1.00%	0.71%	1.59%	-1.24%	-0.26%	-1.14%	-0.72%	1.70%	0.48%

(1) It is important to note that this reflects the November 15, 2018 date of membership as outlined in by the Schools Adequate Public Facilities Ordinan

(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 CHI

(3) Annual growth rate calculated using actual membership for years 2009-10 through 2018-19 and average membership for years 2019-20 through 2028-29

Partnership Academy Alternative School relocated - capacity added

Orange High capacity decreased, per DPI study

Cedar Ridge High School adding 500 seats.

CHCCS Student Projections (1) (4)

Elementary																					
School Year	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Actual	5,302	5,219	5,296	5,464	5,543	5,554	5,541	5,501	5,567	5,522	5,471										
Tischler (2)												5,512	5,554	5,595	5,636	5,677	5,719	5,760	5,801	5,843	5,884
OC Planning												5,417	5,461	5,504	5,546	5,587	5,628	5,654	5,680	5,691	5,690
10 Year Growth												5,423	5,418	5,464	5,489	5,603	5,659	5,715	5,772	5,830	5,888
5 Year Growth												5,473	5,369	5,340	5,332	5,326	5,379	5,433	5,487	5,542	5,598
3 Year Growth												5,418	5,420	5,468	5,485	5,592	5,648	5,704	5,761	5,819	5,877
Average												5,448	5,444	5,474	5,498	5,557	5,606	5,653	5,700	5,745	5,787
Annual Change - Increase (Decrease) in Actual & Projected Membership)	129	(83)	77	168	79	11	(13)	(40)	66	(45)	(51)	(74)	(4)	30	24	59	49	47	47	45	42
Capacity - 100% Level of Service (LOS)	5,244	5,244	5,244	5,244	5,244	5,829	5,829	5,829	5,829	5,664	5,664	5,664	5,664	5,664	5,664	5,664	5,664	5,664	5,664	5,664	5,664
Number of Students, Actual and Projected, Over (Under) 100% LOS	58	(25)	52	220	299	(275)	(288)	(328)	(262)	(142)	(193)	(216)	(220)	(190)	(166)	(107)	(58)	(11)	36	81	123
Capacity - 105% Level of Service (LOS)	5,506	5,506	5,506	5,506	5,506	6,120	6,120	6,120	6,120	5,947	5,947	5,947	5,947	5,947	5,947	5,947	5,947	5,947	5,947	5,947	5,947
Number of Students, Actual and Projected, Over (Under) 105% LOS	(204)	(287)	(210)	(42)	37	(566)	(579)	(619)	(553)	(425)	(476)	(499)	(503)	(473)	(449)	(390)	(341)	(294)	(247)	(202)	(160)
Actual - % Level of Service	101.1%	99.5%	101.0%	104.2%	105.7%	95.3%	95.1%	94.4%	95.5%	97.5%	96.6%	96.2%	96.1%	96.6%	97.1%	98.1%	99.0%	99.8%	100.6%	101.4%	102.2%
Average - % Level of Service																					
Annual Student Growth Rate (3)	2.49%	-1.57%	1.48%	3.17%	1.45%	0.20%	-0.23%	-0.72%	1.20%	-0.81%	-0.92%	-0.41%	-0.08%	0.55%	0.43%	1.07%	0.89%	0.84%	0.83%	0.78%	0.74%

Per November 15, 2005 Certified Capacity Calculations, CHCCS projects Elementary #10 opening for school year 2008-09. In accordance with BOCC adopted School Construction Standards, elementary school capacity totals 600 students.
Important Note: Per 2005 agreement of School Collaboration Work Group, Grades K-3 class size reduced from 1:23 to 1:21 the year Elementary #10 opens (to allow for prior Legislative Action re: reduced class size)

Elementary School #11 opens with 585 seats

Capacity decrease due to change in class size ratios per House Bill 13 (K-3 average class size ratios are 1:20 as directed by State legislative action)

- (1) It is important to note that this reflects the November 15, 2018 date of membership as outlined in by the Schools Adequate Public Facilities Ordinance. It does not include CHCCS students attending the Hospital School.
- (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 CHCC
- (3) Annual growth rate calculated using actual membership for years 2009-10 through 2018-19 and average membership for years 2019-20 through 2028-29
- (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 actio

CHCCS Student Projections (1)

Middle																					
School Year	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Actual	2,697	2,708	2,722	2,753	2,785	2,858	2,861	2,844	2,829	2,833	2,933										
Tischler (2)												2,955	2,977	2,999	3,022	3,044	3,066	3,088	3,110	3,132	3,154
OC Planning												2,910	2,908	2,905	2,901	2,897	2,918	2,937	2,963	2,963	2,981
10 Year Growth												3,010	3,008	2,951	2,905	2,814	2,835	2,833	2,921	2,950	2,980
5 Year Growth												2,908	2,976	2,962	2,944	2,871	2,814	2,781	2,748	2,775	2,803
3 Year Growth												3,025	3,036	2,987	2,944	2,866	2,890	2,879	2,962	2,991	3,021
Average												2,962	2,981	2,961	2,943	2,898	2,905	2,904	2,939	2,962	2,988
Annual Change - Increase (Decrease) in Actual & Projected Membership)	75	11	14	31	32	73	76	(17)	(15)	4	100	29	19	(20)	(18)	(45)	6	(1)	36	23	26
Capacity - 100% Level of Service	2,840	2,840	2,840	2,840	2,840	2,840	2,944	2,944	2,944	2,944	2,944	2,944	2,944	2,944	2,944	2,944	2,944	2,944	2,944	2,944	2,944
Number of Students, Actual and Projected, Over (Under) 100% LOS	(143)	(132)	(118)	(87)	(55)	18	(83)	(100)	(115)	(111)	(111)	18	37	17	(1)	(46)	(39)	(40)	(5)	18	44
107% Level of Service	3,039	3,039	3,039	3,039	3,039	3,039	3,150	3,150	3,150	3,150	3,150	3,150	3,150	3,150	3,150	3,150	3,150	3,150	3,150	3,150	3,150
Number of Students, Actual and Projected, Over (Under) 107% LOS	(342)	(331)	(317)	(286)	(254)	(181)	(289)	(306)	(321)	(317)	(217)	(189)	(169)	(189)	(207)	(252)	(246)	(247)	(211)	(188)	(162)
Actual - % Level of Service	95.0%	95.4%	95.8%	96.9%	98.1%	100.6%	97.2%	96.6%	96.1%	96.2%	99.6%	100.6%	101.3%	100.6%	100.0%	98.5%	98.7%	98.6%	99.8%	100.6%	101.5%
Average - % Level of Service																					
Annual Student Growth Rate (3)	2.86%	0.41%	0.52%	1.14%	1.16%	2.62%	0.10%	-0.59%	-0.53%	0.14%	3.53%	0.97%	0.65%	-0.68%	-0.60%	-1.52%	0.21%	-0.04%	1.24%	0.78%	0.86%

Additional 104 new seats at Culbreth Middle School

- (1) It is important to note that this reflects the November 15, 2018 date of membership as outlined in by the Schools Adequate Public Facilities Ordinance. It does not include CHCCS students attending the Hospital Scho
- (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 CHCC
- (3) Annual growth rate calculated using actual membership for years 2009-10 through 2018-19 and average membership for years 2019-20 through 2028-29

CHCCS Student Projections (1)

High																					
School Year	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Actual	3,630	3,606	3,640	3,714	3,796	3,764	3,730	3,701	3,762	3,927	3,932										
Tischler (2)												3,962	3,991	4,021	4,051	4,080	4,110	4,140	4,169	4,199	4,229
OC Planning												4,055	4,057	4,058	4,058	4,057	4,031	4,015	3,999	4,007	4,015
10 Year Growth												3,894	3,929	3,932	4,055	4,092	4,040	4,014	3,884	3,867	3,902
5 Year Growth												3,902	3,908	3,900	3,881	4,019	4,017	3,983	3,971	3,846	3,798
3 Year Growth												3,926	3,974	3,995	4,140	4,182	4,144	4,140	4,010	3,996	4,034
Average												3,948	3,972	3,981	4,037	4,086	4,068	4,058	4,007	3,983	3,995
Annual Change - Increase (Decrease) in Actual & Projected Membership)	(5)	(24)	34	74	82	(32)	(66)	(29)	61	165	5	16	24	9	56	49	(18)	(10)	(52)	(23)	12
Capacity - 100% Level of Service	3,835	3,835	3,875	3,875	3,875	3,875	3,875	3,875	3,875	3,875	3,875	3,875	3,980	3,980	3,980	3,980	3,980	3,980	3,980	3,980	3,980
Number of Students, Actual and Projected, Over (Under) 100% LOS	(205)	(229)	(235)	(161)	(79)	(111)	(145)	(174)	(113)	52	57	73	(8)	57	106	88	78	78	27	3	15
110% Level of Service	4,219	4,219	4,263	4,263	4,263	4,263	4,263	4,263	4,263	4,263	4,263	4,263	4,378	4,378	4,378	4,378	4,378	4,378	4,378	4,378	4,378
Number of Students, Actual and Projected, Over (Under) 110% LOS	(589)	(613)	(623)	(549)	(467)	(499)	(533)	(562)	(501)	(336)	(331)	(315)	(406)	(397)	(341)	(292)	(310)	(320)	(371)	(395)	(383)
Actual - % Level of Service	94.7%	94.0%	93.9%	95.8%	98.0%	97.1%	96.3%	95.5%	97.1%	101.3%	101.5%	101.9%	99.8%	100.0%	101.4%	102.7%	102.2%	102.0%	100.7%	100.1%	100.4%
Average - % Level of Service																					
Annual Student Growth Rate (3)	-0.14%	-0.66%	0.94%	2.03%	2.21%	-0.84%	-0.90%	-0.78%	1.65%	4.39%	0.13%	0.40%	0.62%	0.23%	1.40%	1.21%	-0.44%	-0.24%	-1.27%	-0.58%	0.30%

Phoenix Academy High School becomes official high school starting 2010-11 school year with 40 student capacity

Chapel Hill High School adding 105 seats.

- (1) It is important to note that this reflects the November 15, 2018 date of membership as outlined in by the Schools Adequate Public Facilities Ordinance. It does not include CHCCS students attending the Hospital Scho
- (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 CHCC
- (3) Annual growth rate calculated using actual membership for years 2009-10 through 2018-19 and average membership for years 2019-20 through 2028-29

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.

(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:

- 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

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

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



Attest:

[Signature]
Secretary

THE CHAPEL HILL-CARRBORO
BOARD OF EDUCATION

By: [Signature]
Chair



ORANGE COUNTY

By: [Signature]
Chair, Board of Commissioners

Attest:

[Signature]
Clerk to the Board of Commissioners

lsg:orangecounty\mou for chcs cb version with geg chgs clean.doc



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: March 27, 2019****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 (CUP 4/26/11)	0	No
Shelton Station (CUP 4/2/13)	57	12/6/12
Inara Court (SUP 2/15/17)	0	10/6/16
610 Homestead Road (SUP 12/21/16)	0	10/6/16
716 Homestead Road (SUP 9/20/17)	0	7/18/17
CASA Merritt Mill Affordable Housing (CUP 3/27/18)	0	No
Sanderway AIS (CUP 2/26/19)	0	No