

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
2005

(BASED ON NOVEMBER 2004 DATA)

CERTIFIED BY THE BOCC ON XXX, 2005

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2005 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%

* Temporarily suspended

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>	4921	4695	3	3820(+100)**	3016	71
<i>Middle</i>	2840	2560	(52)	1466	1593	(78)
<i>High</i>	3035	3422	92	2518	2057	170

** Current capacity is 3820. An additional 100 seats are scheduled for completion in 2005-06.

C. Membership Date – November 15, 2004.....(No Change).....Pg.21

II. Annual Update to SAPFO System

A. Capital Investment Plan (CIP).....(Change).....Pg. 22

B. Student Membership Projection Methodology.....(No Change).....Pg. 23
The average of 3, 5, and 10 year history/cohort survival and 2 linear projection models.

C. Student Membership Projections.....(Change).....Pg.38

5 Year out Snapshot Comparison						
(arrow indicates whether there was an increase or decrease in projection total between prior year and subsequent year)						
	<i>Chapel Hill/Carrboro School District</i>			<i>Orange County School District</i>		
	2002	2003	2004	2002	2003	2004
<i>Elementary</i>	5405	5366 ↓	5040 ↓	3067	3126 ↑	3201 ↑
<i>Middle</i>	2954	2883 ↓	2677 ↓	1587	1656 ↑	1618 ↓
<i>High</i>	3719	3737 ↑	3651 ↓	1952	2070 ↑	2135 ↑

D. Student Growth Rate.....(Change).....Pg. 48

Average Annual Growth Rate over 10 Years				
	<i>Chapel Hill/Carrboro School District</i>		<i>Orange County School District</i>	
	2003	2004	2003	2004
<i>Elementary</i>	2.34%	1.79%	1.54%	1.68%
<i>Middle</i>	2.63%	1.91%	0.79%	1.50%
<i>High</i>	2.81%	2.04%	1.28%	1.21%

E. Student / Housing Generation Rate.....(No Change).....Pg. 52

SCHOOL ADEQUATE PUBLIC FACILITIES ORDINANCE STATUS
(based on future year Student Membership Projections)

The following information relates to existing school certified capacities and is not related to new legislation from DPI (Department of Public Instruction) affecting elementary schools.

CHAPEL HILL/CARRBORO SCHOOL DISTRICT

Elementary School District

- A. Does not currently exceed 105% LOS standards (current LOS is 95.4%).
- B. Decrease in the increase of the growth rate at this level over the next 10 years.
- C. Chapel Hill/Carrboro Elementary School #10 should be scheduled for a 2009-10 opening.

Middle School District

- A. Does not currently exceed 107% LOS standards (current LOS is 90.1%).
- B. Decrease in the increase of the growth rate at this level over the next 10 years.
- C. Chapel Hill/Carrboro Middle School #5 would likely be projected for 2013-14 versus the prior year projection of 2009-10.

High School District

- A. Currently exceeds the 110% LOS standard (current LOS is 112.8%), but Memorandum of Understanding (MOU) suspended the Certificate Adequate Public Schools (CAPS) adequacy test at this level so CAPS may still be issued.
- B. Decrease in the increase of the growth rate at this level over the next 10 years.
- C. Chapel Hill/Carrboro High School #3 is still needed as soon as possible with current construction schedule estimates at 2006-2007 but with a likely change to 2007-2008.

ORANGE COUNTY SCHOOL DISTRICT

Elementary School District

- A. Does not currently exceed 105% LOS standard (current LOS is 79.0%).
- B. Increase in the increase of the growth rate at this level over the next 10 years.
- C. Does not affect or prompt CIP activity in 10-year timeframe.

Middle School District

- A. Presently at 108.7% LOS which exceeds 107% LOS standard but Memorandum of Understanding (MOU) suspended the Certificate Adequate Public Schools (CAPS) adequacy test at this level until Orange County School District (OCSD) Middle School #3 opens so CAPS may still be issued.
- B. Increase in the increase of the growth rate at this level over the next 10 years.
- C. OCSD Middle School #3 is still needed as soon as possible with construction schedule estimates at 2006-2007.

High School District

- A. Does not currently exceed 110% LOS (current LOS is 81.7%).
- B. Decrease in the increase of the growth rate at this level over the next 10 years.
- C. Does not affect or prompt CIP activity in 10-year time frame.

Orange County, NC School Adequate Public Facilities Ordinance

INTRODUCTION

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

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

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

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

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

In summary, this report serves as an update to the dynamic conditions of school membership, school capacity, and housing development, which effects future projections, as well as, 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.

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

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

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

Planning Directors/School Representatives
Technical Advisory Committee

(aka SAPFOTAC)

Orange County Planning Department
Craig Benedict, Planning Director
306-F Revere Road
P.O. Box 8181
Hillsborough, NC 27278

Town of Chapel Hill
Roger Waldon, Planning Director
306 N. Columbia Street
Chapel Hill, North Carolina 27516

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

Orange County School District
Shirley Carraway, Superintendent
200 E. King Street
Hillsborough, NC 27278

Carrboro Planning Department
Roy Williford, Planning Director
P.O. Box 829
Carrboro, NC 27510

Chapel Hill-Carrboro School District
Steve Scroggs, Support Services
750 Merritt Mill Road
Chapel Hill, NC 25716

Includes:
SAPFOTAC/O.C. Budget Liaison
Donna Dean
208 South Cameron Street
P.O. Box 8181
Hillsborough, NC 27278

I. BASE MEMORANDUM OF UNDERSTANDING

A. Level of Service

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

Chapel Hill Carrboro School District			Orange County School District		
Elementary	Middle	High School	Elementary	Middle	High School
105%	107%	N/A	105%	N/A	110%
		110%		107%	

N/A – This means the School APFO Adequacy Test has been “suspended” in accordance with addendums to the Memorandum of Understanding until proposed capacity is added in the specific school level area.

4. *Analysis of Existing Conditions*

Chapel Hill Carrboro School District

These standards are acceptable at this time. Please note that the High School Adequacy test has been suspended (i.e., does not apply) until the new High School opens which is scheduled for Fall, 2007 at which time the test for the High School will be automatically reinstated.

Analysis of Existing Conditions

Orange County School District

These standards are acceptable at this time. Please note that the Middle School Adequacy test has been suspended (i.e., does not apply) until the new Middle School opens which is scheduled for Fall, 2006 at which time the test for the Middle School will be automatically reinstated.

5. *Recommendation –*

No Change from above standard

Recommendation–

No Change from above standard

B. Building Capacity

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

3. **Standard for:**

Chapel Hill Carrboro School District

The original certified capacity for each of the schools was certified by the respective superintendent and incorporated in the initialization of the CAPS system (Chapel Hill Carrboro School District April 29, 2002 - Base) (See Attachment I. B. 2)

Capacity changes were made each year as

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) (See Attachment I. B. 1.)

Capacity changes were made each year as

Section I

follows:

2003: Increase of 619 at Rashkis Elementary.

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

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 level. No changes at Middle or High School levels.

4. *Analysis of Existing Conditions*

Chapel Hill Carrboro School District

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

The requested 2004-5 capacity is noted on Attachment I.B.6.

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 2004-5 capacity is noted on Attachment I.B.5

Please note that the information contained in this report relates to existing school certified capacities and is not related to new legislation from DPI (Department of Public Instruction) affecting elementary schools. Any capacity changes related to DPI legislation will require reconvening of a School Facilities Task Force type of group that can act as a Joint Action Committee.

5. *Recommendation – No Change at this time*

After input from SAPFO partners and comments from authorized Task Forces, the

Recommendation– No Change at this time

After input from SAPFO partners and comments from authorized Task Forces, the Board of County Commissioners would render

Section I

Board of County Commissioners would render a decision prior to a November update.
a decision prior to a November update.

Report for 4b
0008

Student Capacity by School District
Permanent Structures Only, No Mobile Units (Including Projects Under Construction)

CHCCS

Elementary	Square Feet	Capacity	Membership ⁽¹⁾
Carbop	60,532	553	482
Ephesus	68,852	472	530
Estes Hills	58,298	549	585
Greenwood	50,764	445	371
PP Graham	63,541	570	587
McDougle	68,000	596	668
Scroggs	58,880	609	572
Seawell	62,669	498	576
Total CHCCS Elementary	548,237	4,302	4,472
Middle			
Colburn	104,738	670	644
McDougle	138,221	732	634
Phillips	108,498	706	749
Smith	128,764	732	621
Total CHCCS Middle School	479,221	2,840	2,548
High			
Chapel Hill	241,111	1,520	1,580
East Chapel Hill	258,985	1,515	1,385
Total CHCCS High School	500,096	3,035	2,965
Total All Levels	1,518,814	10,177	9,975

OCS

Elementary	Square Feet	Capacity	Membership ⁽¹⁾
Cameron Park	70,812	688	458
Central	52,482	483	293
Ellend Cheeks	64,516	528	411
Grady Brown	74,018	575	459
Hillsborough	51,105	414	383
New Hope	100,184	621	457
Pathways	65,282	600	427
Total OCS Elementary	488,158	3,820	2,996
Middle			
A.L. Starback	138,000	740	744
C.W. Stanford	107,820	726	789
Total OCS Middle School	243,820	1,466	1,533
High			
Orange	213,609	1,516	1,723
Total OCS High School	213,609	1,516	1,723
Total All Levels	935,317	6,804	6,152

⁽¹⁾ 3rd Month Membership

Lanney Switzer
Principal

certify that the above capacity and membership numbers for the School District are correct.

4/30/02
(Date)

Report for 4b

Student Capacity by School District (School Year Ending 2002)
 Permanent Structures Only, No Mobile Units (Including Projects Under Construction)

CHCCS

	Square Feet	Capacity	Membership (1)
Elementary			
Carboro	80,832	583	482
Ephesus	68,882	472	550
Essex Hills	58,239	548	656
Glenwood	80,784	445	371
FP Graham	63,641	570	587
McDougle	98,000	598	689
Scruggs	90,880	608	572
Seawell	82,889	498	678
Total CHCCS Elementary	540,937	4,302	4,472
Middle			
Cubensh	104,798	670	644
McDougle	138,221	732	634
Phillips	109,488	708	749
Smith	128,784	732	521
Total CHCCS Middle School	470,981	2,840	2,548
High			
Chapel Hill	241,111	1,520	1,560
East Chapel Hill	258,985	1,515	1,305
Total CHCCS High School	500,096	3,035	2,865
Total All Levels	1,519,614	10,177	9,975

OCS

	Square Feet	Capacity	Membership (1)
Elementary			
Cameron Park	70,812	598	458
Central	52,492	483	293
Elland Cheeks	64,318	528	411
Grady Brown	74,018	575	459
Hillsborough	51,108	414	393
New Hope	100,184	621	457
Pathways	88,282	600	427
Total OCS Elementary	492,189	3,820	2,898
Middle			
A.L. Starback	136,000	740	744
C.W. Stanford	107,620	728	789
Total OCS Middle School	243,620	1,468	1,533
High			
Orange	213,509	1,518	1,723
Total OCS High School	213,509	1,518	1,723
Total All Levels	955,317	6,804	6,152

(1) 3rd Month Membership

Neil Pedersen
 certify that the above capacity and membership numbers for the
Chapel Hill-Carboro Schools School District are correct.

4/29/02
 (Date)

Orange County Schools - 2003-2004 School Facilities Capacity Report

School District: Orange County Schools
School Year: November 15, 2003 - November 14, 2004

Elementary School	2002-2003 Capacity	2003-2004 Requested Capacity	2004-2005 Requested Capacity	2005-2006 Requested Capacity	2006-2007 Requested Capacity	Justification Comments	Membership Classified as a School (Y/N)
	70,812	598					
	52,492	483					
	64,316	529					
	74,016	575					
	51,106	414					
	100,164	621					
	85,282	600					
	498,188						

Special Note: 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: An increase in Hillsborough Elementary capacity of 100 was completed prior to the start of the 2003-04 school year in accordance with the CIP. However, due to continuing renovations within the school, the eventual full capacity of 514 student seats will not be achieved until the 2005/2006 school year.

Capacity Certification:

 Superintendent Date

 BOCC Chair Date

Membership Certification:

 Superintendent Date

 BOCC Chair Date

School APPC Capacity Calculation and Change Request Form

School District: Orange County Schools
School Year: November 15, 2003 - November 14, 2004

Membership	2002-2003 Requested Capacity	2003-2004 Requested Capacity	2004-2005 Requested Capacity	2005-2006 Requested Capacity	2006-2007 Requested Capacity	Justification Footnote	Membership Exceeded School Year
	213,509	1,518					
	206,900	1,000					
	420,409						

Special Note: 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: Completed construction of Cedar Ridge High School. This school opened in the fall of 2002 with a school capacity of 1,000 students.

Capacity Certification:

 Superintendent Date BOCC Chair Date

Membership Certification:

 Superintendent Date BOCC Chair Date

School Area Capacity Data and Change Request Form

School District: Chapel Hill-Carrboro City Schools
School Year: November 15, 2003 - November 14, 2004

Elementary School	2002-2003 Capacity	2003-2004 Requested Capacity	2004-2005 Requested Capacity	2005-2006 Requested Capacity	2006-2007 Requested Capacity	Justification Program	Membership
	60,832	563					
	66,952	472					
	56,299	549					
	50,764	445					
	63,541	578					
	98,000	596					
	94,234	619					
	98,988	609					
	52,896	498					
	634,498						

Special Note: 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:

An increase in capacity of 619 at Rashkis Elementary was completed prior to the start of the 2003-04 school year in accordance with the CIP.

Capacity Certification:

Superintendent Date

BOCC Chair Date

Membership Certification:

Superintendent Date

BOCC Chair Date

School APPC Capacity, Certification and Change Request Form

School District: Chapel Hill-Carrboro City Schools
School Year: November 15, 2003 - November 14, 2004

Membership	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	Justification	Membership
Requested Capacity	Requested Capacity	Requested Capacity	Requested Capacity	Requested Capacity	Requested Capacity	Footnote	(reference) School year
104,798		670					
136,221		732					
109,498		706					
128,764		732					
479,281							

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

Justification: _____

Capacity Certification:

 Superintendent Date BOCC Chair Date

Membership Certification:

 Superintendent Date BOCC Chair Date

School District: Orange County Schools

School Year: November 15, 2004 - November 14, 2005

Elementary School	2002-2003 Capacity	2003-2004 Requested Capacity	2004-2005 Requested Capacity	2005-2006 Requested Capacity	2006-2007 Requested Capacity	Justification Footnote #	Membership (reference school year)
Hillsborough	70,812	598					
Green	52,492	483					
Briggs	64,316	529					
Wendell	74,016	575					
Bill	51,106	414					
North Hills	100,164	621					
Palmdale	85,282	600					
Total	498,188						

Special Note: 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: An increase in Hillsborough Elementary capacity of 100 was completed prior to the start of the 2003-04 school year in accordance with the CIP. However, due to continuing renovations within the school, the eventual full capacity of 514 student seats will not be achieved until the 2005/2006 school year. The above numbers reflect school capacity without consideration of state class size reductions in grades K-3.

Capacity Certification:

Jim Carey 11-16-04
Superintendent Date

Morris Carey 12-15-04
BOCC Chair Date

Membership Certification:

Jim Carey 11-16-04
Superintendent Date

Morris Carey 12-15-04
BOCC Chair Date

School District: Orange County Schools

School Year: November 15, 2004 - November 14, 2005

Elementary School	2002-2003 Capacity	2003-2004 Requested Capacity	2004-2005 Requested Capacity	2005-2006 Requested Capacity	2006-2007 Requested Capacity	Justification Footnotes	Membership Referenced School Year
Central	70,812		598				
Central	52,492		483				
Blair/Cherry	64,316		529				432
Grady Brown	74,016		575				432
Hillsborough	51,106		414				
Northridge	100,164		621				
Palmdale	85,282		600				
Total	498,188						

Special Note: 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 are based on the 2002-2003 school year.

Justification: An increase in Hillsborough Elementary capacity of 100 was completed prior to the start of the 2003-04 school year in accordance with the CIP. However, due to continuing renovations within the school, the eventual full capacity of 514 student seats will not be achieved until the 2005/2006 school year. Legislative action taken in July, 2004 reduced class size in grade 3 to 21 or fewer students. Previous legislative action had already reduced class size in grades K - 2 to 21 or fewer students. This reduction in class size requirements for all grades K-3 reduces the number of students that can be legally placed within K-3 classrooms, effectively reducing the number of K-3 seats available within all elementary schools. The adjustment in capacity is a reflection of all of these actions.

Capacity Certification:

[Signature] 11-16-04
Superintendent Date

[Signature]
BOCC Chair Date

Membership Certification:

[Signature] 11-16-04
Superintendent Date

[Signature]
BOCC Chair Date

School District: Orange County Schools

School Year: November 15, 2004 - November 14, 2005

Minimum School	Superintendent	2002-2003 Capacity	2003-2004 Requested Capacity	2004-2005 Requested Capacity	2005-2006 Requested Capacity	2006-2007 Requested Capacity	Justification Entry #	Membership referenced school year
	136,000		740					
C.S. Schools	107,620		726					
	243,620							

Special Note: 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: No change in capacity.

Capacity Certification:

A. Conway 11-16-04
Superintendent Date

Mona Carey
BOCC Chair Date

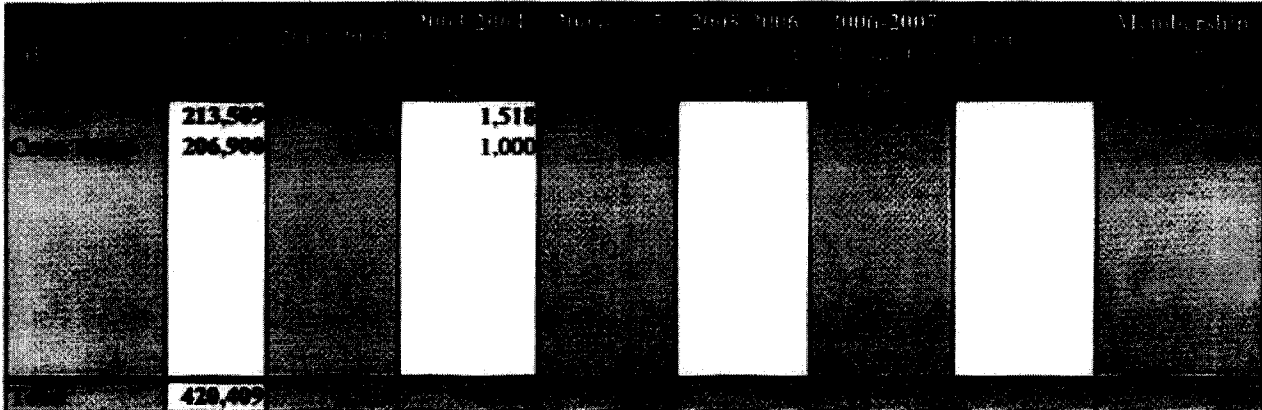
Membership Certification:

A. Conway 11-16-04
Superintendent Date

Mona Carey
BOCC Chair Date

School Districts: Orange County Schools

School Year: November 15, 2004 - November 14, 2005



Special Note: 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: No change in capacity.

Capacity Certification:

St. Caray 11-16-04
Superintendent Date

Maxis Crepps
BOCC Chair Date

Membership Certification:

St. Caray 11-16-04
Superintendent Date

Maxis Crepps
BOCC Chair Date

School APFO Capacity Calculation and Change Request Form

School District: Chapel Hill-Carrboro City Schools
School Year: November 15, 2004 – November 14, 2005

Elementary School	Square Feet	2002-2003 Capacity	2003-2004 Requested Capacity	2004-2005 Requested Capacity	2005-2006 Requested Capacity	2006-2007 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Carrboro	60,832	563	563	563				590
Ephesus	66,952	472	472	472				428
Estes Hills	56,299	549	549	549				473
Glenwood	50,764	445	445	445				564
FP Graham	63,541	570	570	570				422
McDougle	98,000	596	596	596				590
Rashkis	94,234	0	619	619				454
Scroggs	90,980	609	609	609				645
Seawell	52,896	498	498	498				529
Total	634,498	4,302	4,921	4,921	0	0		4,695

Special Note: 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:

An increase in capacity of 619 at Rashkis Elementary was completed prior to the start of the 2003-04 school year in accordance with the CIP.

The above numbers reflect school capacity without consideration of state class size reductions in grades K-3

Capacity Certification:

Superintendent Date

BOCC Chair Date

Membership Certification:

Superintendent Date

BOCC Chair Date

School District: Chapel Hill-Carrboro City Schools

School Year: November 15, 2004 – November 14, 2005

Elementary School	Square Feet	2002-2003 Capacity	2003-2004 Requested Capacity	2004-2005 Requested Capacity	2005-2006 Requested Capacity	2006-2007 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Carrboro	60,832	563	563	533				590
Ephesus	66,952	472	472	448				428
Estes Hills	56,299	549	549	527				473
Glenwood	50,764	445	445	423				564
FP Graham	63,541	570	570	558				422
McDonie	98,000	596	596	564				590
Rashkis	94,234	0	619	585				454
Soroggs	90,980	609	609	575				645
Stowell	52,896	498	498	466				529
Total	634,498	4,302	4,921	4,659	0	0		4,695

Special Note: 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:

An increase in capacity of 619 at Rashkis Elementary was completed prior to the start of the 2003-04 school year in accordance with the CIP.

Legislative action taken in July, 2004 reduced class size in grade 3 to 21 or fewer students.

Previous legislative action had already reduced class size in grades K - 2 to 21 or fewer students. This reduction in class size requirements for all grades K-3 reduces the number of students that can be legally placed within K-3 classrooms, effectively reducing the number of K-3 seats available within all elementary schools. The adjustment in capacity is a reflection of all of these actions.

Capacity Certification:

Neil M. Leder 12-20-04
Superintendent Date

BOCC Chair Date

Membership Certification:

Neil M. Leder 12-20-04
Superintendent Date

BOCC Chair Date

School District: Chapel Hill-Carrboro City Schools

School Year: November 15, 2004 – November 14, 2005

High School	Square Feet	2002-2003 Capacity	2003-2004 Requested Capacity	2004-2005 Requested Capacity	2005-2006 Requested Capacity	2006-2007 Requested Capacity	Justification Footnote #	Membership (referenced school year)
Chapel Hill	241,111	1,520	1,520	1,520				1,785
East Chapel Hill	258,985	1,515	1,515	1,515				1,637
Total	500,096	3,035	3,035	3,035	0	0		3,422

Special Note: 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: No change in capacity requested

Capacity Certification:

Mark Bell 12-20-04
Superintendent Date

BOCC Chair Date

Membership Certification:

Mark Bell 12-20-04
Superintendent Date

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 School APFO partners 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:	Standard for:
Chapel Hill Carrboro School District	Orange County School District
November 15 of each year	November 15 of each year

4. **Analysis of Existing Conditions**

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

This date may sometimes occur on a weekend (as it did in 2003) and is not a typical date for membership census and recordation. An earlier date such as the “40th day” membership may be suggested in future years so data can be analyzed earlier to assist in school CIP needs assessment.

- | | |
|---------------------------------------------------|------------------------------------------------|
| 5. Recommendation - No change at this time | Recommendation - No change at this time |
|---------------------------------------------------|------------------------------------------------|

II. ANNUAL UPDATE TO SCHOOLS ADEQUATE PUBLIC FACILITIES ORDINANCE SYSTEM

A. Capital Investment Plan (CIP)

1. **Responsible Entity for Suggesting Change** – The updating of this section will be conducted by the Board of County Commissioners (BOCC) after review of the CIP requests from the School Districts. Action regarding CIP programs usually occurs during the BOCC budget Public Hearing process in the 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. The plan includes funding for CHCCS High School #3 (2007), funding recognition of CHCCS Elementary School #10 (2009), and funding for OCS Middle School #3 (2006). A new Capital Investment Plan is currently under development for approval prior to June 30, 2005.
5. **Recommendation** –
Not subject to staff review

B. Student Projection Methodology

1. **Responsible Entity for Suggesting Change** – This section is reviewed and recommended by the Planning Directors, School Representatives, Technical Advisory Committee years to determine total membership at each combined school level (Elementary, Middle and High School) which take into consideration historical membership totals at a specific time (November 15) in the school year. These methods are also known as ‘models’.

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

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

4. **Analysis of Existing Conditions**

Performance of the models is monitored each year. The value of a projection model is in its prediction of school level capacities at least three years in advance of capacity shortfalls so the annual Capital Investment Plan (CIP) updates can respond proactively with siting, design, and construction. Attachment II.B.2 shows the performance of the models for the 2004-5 school year from the prior year projection (i.e., only a one year projection). After which, a summary of each model is provided.

5. **Recommendation** –
No Change from above standard.

STUDENT MEMBERSHIP PROJECTION

School District: Orange County
Year/Date Issued: 11/22/04
Year/Date Based: November 15, 2004-2005
Years Projected: 2006-2015

A. Projection Type: Tischler Linear

1. Projection Description/ Characteristics: Mathematical Formula
Straight Line Projection

2. Projection Formula: $y = ((c*b)*x)+b$
(y = Projected Population; c = Historical Annual Change; b = Base Year; x = Projection Years)

3. Projection Assumptions: Historical growth is reflected in projected growth
% Elementary, Middle, and High taken from SYE 2005 and held constant throughout projection.

4. Average Annual Growth Rate: 1.48% *Note: this is an average annual growth rate over ten years*

5. Attachments: _____

6. Projection Performed: By: Brian Carson Date: 11/22/04

7. Projection Reviewed: By: _____ Date: _____

8. Projection Certified: _____

9. Comments: _____

STUDENT MEMBERSHIP PROJECTION

School District: Orange County
 Year/Date Issued: 12/09/2004
 Year/Date Based: November 15, 2004-2005
 Years Projected: 2006-2015

A. Projection Type: OCP Linear Wave

1. Projection Description/Characteristics: Mathematical linear with percent variation among school levels. Reflecting progressing waves of membership.

2. Projection Formula: BYM + (BYI - 15(n)) = EYM EYM x %SL = EYM/SL
(BYM = Base year 2nd month membership; BYI = year student membership increment base (315); 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)

3. Projection Assumptions: Base year growth reflects 10-year average. Increase in BYI of 5 reflects decreases in housing growth. Reflects buildout constraints.

4. Average Annual Growth Rate: 1.69 %
ASGR = (2015 PM - 2005 AM)/10 = 158.5 (ASGR = Annual Student Growth Rate; PM = Projected Membership, AM = Actual Membership)

5. Attachments: a) Projections (includes: Total, Elementary, Middle, and High)

6. Projection Performed: By: Brian Carson Date: 12/09/2004

7. Projection Reviewed: By: Date:

8. Projection Certified: _____

9. Comments: _____

STUDENT MEMBERSHIP PROJECTION

School District: Orange County
 Year/Date Issued: November 16, 2004
 Year/Date Based: November 15, 2004-2005
 Years Projected: 2006-2015

A. Projection Type: 3 Year Cohort

1. Projection Description/ Characteristics: 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.

2. Projection Formula:
$$K_n = K_{n-1} + (K_{n-1} * 0.01) \quad a = \left(\sum_{n=10}^{n=1} G_n / g_{n-1} \right) / 10 \quad b = g_{n-1}(a)$$

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

3. Projection Assumptions: 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.

4. Average Annual Growth Rate: 1.32% *Note: This is an average annual rate over all school levels over ten years.*

5. Attachments: _____

6. Projection Performed: By: Scroggs, Benedict, Dean Date: 11/16/2004

7. Projection Reviewed: By: Date:

8. Projection Certified: _____

9. Comments: _____

STUDENT MEMBERSHIP PROJECTION

School District: Orange County
 Year/Date Issued: November 16, 2004
 Year/Date Based: November 15, 2004-2005
 Years Projected: 2006-2015

A. Projection Type: 5 Year Cohort

1. Projection Description/ Characteristics: 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.

2. Projection Formula:
$$K_n = K_{n-1} + (K_{n-1} * 0.01) \quad a = \left(\sum_{n=10}^{n-1} G_n / g_{n-1} \right) / 10 \quad b = g_{n-1}(a)$$

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

3. Projection Assumptions: 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.

4. Average Annual Growth Rate: 0.62% *Note: This is an average annual rate over all school levels over ten years.*

5. Attachments: _____

6. Projection Performed: By: Scroggs, Benedict, Dean Date: 11/16/2004

7. Projection Reviewed: By: Date:

8. Projection Certified: _____

9. Comments: _____

STUDENT MEMBERSHIP PROJECTION

School District: Orange County
 Year/Date Issued: November 16, 2004
 Year/Date Based: November 15, 2004-2005
 Years Projected: 2006-2015

A. Projection Type: 10 Year Cohort

1. Projection Description/ Characteristics: 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.

2. Projection Formula:
$$K_n = K_{n-1} + (K_{n-1} * 0.01) \quad a = \left(\sum_{n=10}^{n-1} G_n / g_{n-1} \right) / 10 \quad b = g_{n-1}(a)$$

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

3. Projection Assumptions: 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.

4. Average Annual Growth Rate: 0.69% Note: This is an average annual rate over all school levels over ten years.

5. Attachments: _____

6. Projection Performed: By: Scroggs, Benedict, Dean Date: 11/16/2004

7. Projection Reviewed: By: Date:

8. Projection Certified: _____

9. Comments: _____

STUDENT MEMBERSHIP PROJECTION

School District: Chapel Hill – Carrboro
Year/Date Issued: 12/09/2004
Year/Date Based: November 15, 2004-2005
Years Projected: 2006-2015

A. Projection Type: Tischler Linear

1. Projection Description/ Characteristics: Mathematical formula
Straight line projection

2. Projection Formula: $y = ((c*b)^*x)+b$
(y = Projected Population; c = Historical Annual Change; b = Base Year; x = Projection Years)

3. Projection Assumptions: Historical growth is reflected in projected growth
% Elementary, Middle, and High taken from SYE 2004 and held constant throughout projection.

4. Annual Growth Rate: 2.45% *Note: this is an average annual growth rate over ten years*

5. Attachments: a) Projections (includes: Total, Elementary, Middle, and High)

6. Projection Performed: By: Brian Carson Date: 12/09/2004

7. Projection Reviewed: By: _____ Date: _____

8. Projection Certified: _____

9. Comments: _____

STUDENT MEMBERSHIP PROJECTION

School District: Chapel Hill - Carrboro
Year/Date Issued: 12/09/2004
Year/Date Based: November 15, 2004-2005
Years Projected: 2006-2015

A. Projection Type: OCP Linear Wave

1. Projection Description/ Characteristics: Mathematical linear with percent variation among school levels. Reflecting progressing waves of membership.

2. Projection Formula: $BYM + (BYI - 15(n)) = EYM$ $EYM \times \%SL = EYM/SL$
(BYM = Base year 2nd month membership; BYI = year student membership increment base (315); 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)

3. Projection Assumptions: Base year growth reflects 10-year average.
Increase in BYI of 5 reflects decreases in housing growth.
Reflects buildout constraints.

4. Average Annual Growth Rate: 1.86 %
 $ASGR = (2015 PM - 2005 AM)/10 = 255.9$ (ASGR = Annual Student Growth Rate, PM = Projected Membership, AM = Actual Membership)

5. Attachments: a) Projections (includes: Total, Elementary, Middle, and High)

6. Projection Performed: By: Brian Carson Date: 12/09/2004

7. Projection Reviewed: By: _____ Date: _____

8. Projection Certified: _____

9. Comments: _____

STUDENT MEMBERSHIP PROJECTION

School District: Chapel Hill - Carrboro
 Year/Date Issued: November 16, 2004
 Year/Date Based: November 15, 2004-2005
 Years Projected: 2006-2015

A. Projection Type: 3 Year Cohort

1. Projection Description/ Characteristics: 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.

2. Projection Formula:
$$K_n = K_{n-1} + (K_{n-1} * 0.01) \quad a = \left(\sum_{n=10}^{n=1} G_n / g_{n-1} \right) / 10 \quad b = g_{n-1}(a)$$

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

3. Projection Assumptions: 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.

4. Average Annual Growth Rate: 0.95% *Note: This is an average annual rate over all school levels over ten years.*

5. Attachments: _____

6. Projection Performed: By: Scroggs, Benedict, Dean Date: 11/16/2004

7. Projection Reviewed: By: Date:

8. Projection Certified: _____

9. Comments: _____

STUDENT MEMBERSHIP PROJECTION

School District: Chapel Hill - Carrboro
 Year/Date Issued: November 16, 2004
 Year/Date Based: November 15, 2004-2005
 Years Projected: 2006-2015

A. Projection Type: 10 Year Cohort

1. Projection Description/ Characteristics: 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.

2. Projection Formula:
$$K_n = K_{n-1} + (K_{n-1} * 0.01) \quad a = \left(\sum_{n=10}^{n-1} G_n / g_{n-1} \right) / 10 \quad b = g_{n-1}(a)$$

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

3. Projection Assumptions: 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.

4. Average Annual Growth Rate: 1.54% *Note: This is an average annual rate over all school levels over ten years.*

5. Attachments: _____

6. Projection Performed: By: Scroggs, Benedict, Dean Date: 11/16/2004

7. Projection Reviewed: By: Date:

8. Projection Certified: _____

9. Comments: _____

