

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
2025**

(BASED ON NOVEMBER 2024 DATA)

CERTIFIED BY THE BOCC ON JUNE 3, 2025

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2025 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 | Change from Prior Year | Capacity** | Membership | Change from Prior Year |
| <i>Elementary</i> | 5315 | 4518 | - 57 | 3453 | 2994 | - 61 |
| <i>Middle</i> | 2993 | 2656 | - 60 | 2396 | 1582 | + 3 |
| <i>High</i> | 3701 | 3958 | - 16 | 2678 | 2369 | -13 |

* Capacity has been updated to reflect the results of the Woolpert, Inc. study.

** Capacity has been updated to reflect use of NCDPI's capacity formulas.

C. Membership Date – November 15.....(No Change).....Pg. 18

II. Annual Update to SAPFO System

A. Capital Investment Plan (CIP)(No Change).....Pg. 19

B. Student Membership Projection Methodology(No Change*).....Pg. 20

The average of 3, 5, and 10-year history/cohort survival, linear and arithmetic projection models.

** See additional information in Executive Summary and Report*

C. Student Membership Projections(Change).....Pg. 30

Analysis of 5 Years of Projections for 2024-2025 School Year – Chapel Hill/Carrboro City Schools

(The first column for each year includes the student membership projection made for 2024-2025 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.)

| | Actual 2024 Membership | Year Projection Made for 2024-2025 Membership | | | | | | | | | |
|-------------------|------------------------|---|------|-----------|------|-----------|------|-----------|-----|-----------|-----|
| | | 2019-2020 | | 2020-2021 | | 2021-2022 | | 2022-2023 | | 2023-2024 | |
| Elementary | 4518 | 5489 | H971 | 4655 | H137 | 4411 | L107 | 4495 | L23 | 4436 | L82 |
| Middle | -2656 | 2917 | H261 | 2671 | H15 | 2581 | L75 | 2631 | L25 | 2669 | H13 |
| High | 3958 | 4111 | H153 | 3893 | L65 | 3801 | L157 | 3862 | L96 | 3926 | L32 |

Analysis of 5 Years of Projections for 2024-2025 School Year – Orange County Schools

(The first column for each year includes the student membership projection made for 2024-2025 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 2024-2025 Membership | | | | | | | | | |
|-------------------|------------------------|---|------|-----------|-----|-----------|------|-----------|-----|-----------|-----|
| | Actual 2024 Membership | 2019-2020 | | 2020-2021 | | 2021-2022 | | 2022-2023 | | 2023-2024 | |
| Elementary | 2994 | 3378 | H384 | 2962 | L32 | 2948 | L46 | 3044 | H50 | 3011 | H17 |
| Middle | 1582 | 1732 | H150 | 1593 | H11 | 1599 | H17 | 1578 | L4 | 1572 | L10 |
| High | 2369 | 2401 | H32 | 2293 | L76 | 2438 | H164 | 2420 | H51 | 2377 | H8 |

D. Student Membership Growth Rate(Change*).....Pg. 37

** See additional information in Executive Summary and Report*

| | | Projected Average Annual Growth Rate Over Next 10 Years | | | | | | | | | |
|-----------------------|--|---|-----------|-----------|-----------|-------------------------------|-----------|-----------|-----------|-----------|-----------|
| | | Chapel Hill/Carrboro School District | | | | Orange County School District | | | | | |
| Year Projection Made: | | 2020-2021 | 2021-2022 | 2022-2023 | 2023-2024 | 2024-2025 | 2020-2021 | 2021-2022 | 2022-2023 | 2023-2024 | 2024-2025 |
| Elementary | | -0.23% | -0.88% | -0.47% | -1.14% | -0.37% | -0.02% | -0.04% | 0.26% | -0.14% | -0.10% |
| Middle | | -1.50% | -2.10% | -1.77% | -1.96% | -1.24% | -0.67% | -0.72% | -0.15% | -0.44% | -0.52% |
| High | | -1.44% | -2.15% | -2.09% | -1.83% | -1.74% | -0.98% | -1.06% | 0.98% | -0.91% | -0.10% |

E. Student / Housing Generation Rate(No Change*).....Pg. 40

** See additional information in Executive Summary and Report*

SCHOOL ADEQUATE PUBLIC FACILITIES ORDINANCE STATUS

(Based on future year Student Membership Projections)

CHAPEL HILL/CARRBORO SCHOOL DISTRICT

Elementary School Level

- A. Does not currently exceed 105% LOS standard (current LOS is 85.0%).
- B. The projected growth rate at this level is expected to increase but remain negative over the next 10 years (average -0.37% per year compared to an average of -1.99% over the past 10 years).
- C. Projections are not showing a need for an additional Elementary School in the 10-year projection period.

Middle School Level

- A. Does not currently exceed 107% LOS standard (current LOS is 88.7%).
- B. The projected growth rate at this level is expected to decrease and remain negative over the next 10 years (average -1.24% compared to an average of -0.71% over the past 10 years).
- C. Projections are not showing a need for an additional Middle School in the 10-year projection period.

High School Level

- A. Does not currently exceed the 110% LOS standard (current LOS is 106.9%).
- B. The projected growth rate at this level is expected to decrease and be negative over the next 10 years (average -1.74% compared to +0.61% over the past 10 years).

- C. Projections are not showing a need to expand Carrboro High School from the initial capacity of 800 students to the ultimate capacity of 1,200 students in the 10-year projection period.

ORANGE COUNTY SCHOOL DISTRICT

Elementary School Level

- A. Does not currently exceed 105% LOS standard (current LOS is 87.3%).
- B. The projected growth rate at this level is expected to increase but remain negative over the next 10 years (average -0.10% compared to -0.82% over the past 10 years).
- C. Projections are not showing a need for an additional Elementary School in the 10-year projection period.

Middle School Level

- A. Does not currently exceed 107% LOS standard (current LOS is 68.9%).
- B. The projected growth rate at this level is expected to increase but remain negative over the next 10 years (average -0.52% compared to -1.05% over the past 10 years).
- C. Projections are not showing a need for an additional Middle School in the 10-year projection period.

High School Level

- A. Does not currently exceed 110% LOS standard (current LOS is 87.7%).
- B. The projected growth rate at this level is expected to increase but remain negative over the next 10 years (average -0.10% compared to -0.52% over the past 10 years).
- C. Projections are not showing a need for additional High School in the 10-year projection period.

ADDITIONAL INFORMATION

Pre-K Students

With the 2023 Woolpert, Inc. study complete, the capacity numbers in both school districts have been updated to account for Pre-K students. The capacity numbers included in this report allocate space for Pre-K classrooms. Pre-K students for each district is as follows:

| | Chapel Hill-Carrboro City Schools | Orange County Schools |
|--------------------|--|------------------------------|
| School Year | Number of Students | Number of Students |
| 2019-20 | 267 | 144 |
| 2020-21 | 208 (-59) | 86 (-58) |
| 2021-22 | 222 (+14) | 125 (+39) |
| 2022-23 | 295 (+73) | 101 (-24) |
| 2023-24 | 250 (-45) | 91 (-10) |
| 2024-25 | 256 (+6) | 87 (-4) |

Charter and Private Schools

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

| | Eno River Academy | The Expedition School |
|---|---------------------------|------------------------------|
| School Year | Number of Students | Number of Students |
| 2017-18 | 542 | 326 |
| 2018-19 | 655 (+113) | 355 (+29) |
| 2019-20 | 715 (+60) | 365 (+10) |
| 2020-21 | 747 (+32) | 365* |
| 2021-22 | 751 (+4) | |
| 2022-23 | 777 (+26) | |
| 2023-24 | 805 (+28) | 362 (-3) |
| 2024-25 | 829 (+24) | 381 (+19) ^ |
| *The Expedition School reached full capacity of 365 students in 2019-20 | | |
| ^Reallocated space to accommodate more students. | | |

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 included in future projections. SAPFO projections are used for projecting only public school capacity/construction needs. However, the SAPFO Technical Advisory Committee does monitor charter and private schools and their effect on student enrollment in both school districts. If a charter or private school were to close and a spike were to be realized in school enrollment, the student projections would likely accelerate the need for additional capacity in future years, but likely 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. The County budgeted for charter schools as follows:

| | Chapel Hill-Carrboro City Schools | Orange County Schools |
|--------------------|--|------------------------------|
| Fiscal Year | Number of Students | Number of Students |
| 2017-18 | 162 | 617 |
| 2018-19 | 155 (-7) | 769 (+152) |
| 2019-20 | 169 (+14) | 843 (+74) |
| 2020-21 | 166 (-3) | 885 (+42) |
| 2021-22 | 156 (-10) | 919 (+34) |
| 2022-23 | 205 (+49) | 951 (+32) |
| 2023-24 | 210 (+5) | 999 (+48) |
| 2024-25 | 231 (+21) | 1091 (+92) |

Although charter and private schools numbers are not collected for SAPFO purposes, 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.

Future Residential Development

Proposed growth is not included in the SAPFO projection system until actual students begin enrollment. The Certificate of Adequate Public Schools (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 capacity/construction requests. The SAPFOTAC continues to monitor and evaluate the demand and growth of residential development throughout Orange County as well as its affect on student membership rates. Below is a list of larger residential projects and the potential number of students from these projects which may have an impact in the short term. Please note, 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.

| Residential Project | Jurisdiction | Proposed Total Units Remaining | Expected Number of Students |
|---|--------------|--------------------------------|--|
| Jade Creek | Carrboro | 72 | Elementary: 19 Middle: 13 High: 12 |
| Newbury | Carrboro | 36 | Elementary: 11 Middle: 7 High: 6 |
| Weavers Grove | Chapel Hill | 243 | Elementary: 44 Middle: 18 High: 20 |
| Park Apartments | Chapel Hill | 259 | Elementary: 28 Middle: 10 High: 13 |
| Trinity Court Affordable Housing | Chapel Hill | 54 | Elementary: 7 Middle: 3 High: 4 |
| Columbia Street Annex | Chapel Hill | 59 | Elementary: 9 Middle: 3 High: 3 |
| 101-111 Erwin Road | Chapel Hill | 52 | Elementary: 21 Middle: 10 High: 9 |
| 710 N Estes Townhomes | Chapel Hill | 107 | Elementary: 21 Middle: 10 High: 9 |
| Stanat's Place | Chapel Hill | 47 | Elementary: 12 Middle: 4 High: 4 |
| Aura Blue Hill | Chapel Hill | 301 | Elementary: 21 Middle: 8 High: 11 |

| Residential Project | Jurisdiction | Proposed Total Units Remaining | Expected Number of Students |
|-------------------------------|---------------------|---------------------------------------|---|
| Aura Chapel Hill | Chapel Hill | 418 | Elementary: 52 Middle: 18 High: 22 |
| Chapel Hill Crossing | Chapel Hill | 314 | Elementary: 35 Middle: 13 High: 16 |
| Gateway | Chapel Hill | 316 | Elementary: 35 Middle: 13 High: 16 |
| Jay St Apartments | Chapel Hill | 48 | Elementary: 5 Middle: 2 High: 2 |
| Hillmont | Chapel Hill | 466 | Elementary: 51 Middle: 19 High: 23 |
| South Creek | Chapel Hill | 269 | Elementary: 32 Middle: 12 High: 14 |
| Homestead Gardens | Chapel Hill | 92 | Elementary: 13 Middle: 5 High: 5 |
| Tri-Point | Chapel Hill | 119 | Elementary: 24 Middle: 8 High: 8 |
| Tarheel Lodging | Chapel Hill | 283 | Elementary: 31 Middle: 11 High: 14 |
| Millennium Chapel Hill | Chapel Hill | 274 | Elementary: 30 Middle: 11 High: 14 |
| South Creek Phase I | Chapel Hill | 92 | Elementary: 10 Middle: 4 High: 5 |
| Collins Ridge Phase 1 | Hillsborough | 631 | Elementary: 84 Middle: 45 High: 57 (exact count of unit types still to be built is unavailable, therefore calculating expected number of students still expected is not possible. These estimates are from last year's count of 672 units remaining) |

| Residential Project | Jurisdiction | Proposed Total Units Remaining | Expected Number of Students |
|------------------------------------|---------------------|---------------------------------------|---|
| Persimmon at Cates Creek | Hillsborough | 346 | Elementary: 22 Middle: 11 High: 15 |
| East Village at Meadowlands | Hillsborough | 76 | Elementary: 5 Middle: 3 High: 4 |
| Waterstone South | Hillsborough | 655 | Elementary: 48 Middle: 22 High: 33 |
| Bowman Place | Mebane | 37 | Elementary: 8 Middle: 4 High: 4 |
| Tupelo Junction | Mebane | 123 | Elementary: 27 Middle: 12 High: 15 |
| Tupelo North | Mebane | 207 | Elementary: 56 Middle: 27 High: 35 |
| Oakwood Subdivision | Mebane | 409 | Elementary: 110 Middle: 53 High: 70 |
| Oak Grove Trails | Mebane | 51 | Elementary: 3 Middle: 2 High: 2 |
| Meadows | Mebane | 11 | Elementary: 2 Middle: 1 High: 1 |
| Meadowstone | Mebane | 147 | Elementary: 8 Middle: 5 High: 6 |
| Saddle Club Subdivision | Mebane | 110 | Elementary: 24 Middle: 11 High: 13 |
| Mebane Village Townes | Mebane | 69 | Elementary: 4 Middle: 3 High: 3 |
| Bowman Road Townhomes | Mebane | 89 | Elementary: 5 Middle: 4 High: 4 |
| NACC Subdivision | Mebane | 106 | Elementary: 23 Middle: 11 High: 13 |
| Edenview | Orange County (OCS) | 38 | Elementary: 10 Middle: 5 High: 7 |

| Residential Project | Jurisdiction | Proposed Total Units Remaining | Expected Number of Students |
|----------------------|---------------------|--------------------------------|---------------------------------------|
| Stonewall | Orange County (OCS) | 18 | Elementary: 4 Middle: 2 High: 2 |
| Williams Glen | Orange County (OCS) | 17 | Elementary: 4 Middle: 2 High: 2 |

The SAPFOTAC also monitors projects that have not reached the stage of the development process when CAPS are issued. Therefore, student estimates are not yet available. The following is a list of projects for which rezoning has been approved:

| Residential Project | Jurisdiction | Expected Number of Units |
|--|--------------|---|
| St Paul Village | Chapel Hill | 350 |
| Link Apartments at 101 E Rosemary | Chapel Hill | 150 |
| Longleaf Trace | Chapel Hill | 42-60 |
| South Creek (Phase 3) | Chapel Hill | 56-76 Single-Family 249-386 Multi-Family |
| Gateway/Meridian (Phase 2) | Chapel Hill | 72 |
| Barbee Chapel Apartments | Chapel Hill | 262-350 |

School Renovation and Expansion

The Schools Adequate Public Facilities Ordinance (SAPFO) student projections illustrate when the adopted level of service capacities are forecasted to be met and/or exceeded in anticipation of Capital Improvement Plan (CIP) planning and the construction of a new school. Both school districts continue planning efforts to renovate and expand existing facilities to address school capacity needs in a more feasible way. Additional capacity resulting from school renovations and expansions will be added to the projection models in stages, once funding is approved, versus the addition of greater capacity when a new school is constructed and completed. The renovation and expansion to existing facilities may delay construction of new schools further into the future, depending on how and how much capacity is added to the system. Decisions on the timing of reconstruction (i.e. capacity additions) funding would be directly linked to the SAPFO model at the appropriate time.

2023 Woolpert Facilities Capital Needs Assessment, Operations Research and Education Laboratory (OREd) Student Projections, Future Student Projection Methodology, and Student Generation Rates

In 2023, Orange County contracted with Woolpert, Inc. to conduct a Facilities Capital Needs Assessment on all schools within both districts. Part of the assessment included calculating capacity at each school. At the Elementary level, two capacity calculations were completed: one that excluded space used by Pre-K programs and one that did not account for Pre-K usage. The capacity numbers reported and used in the 2025 SAPFOTAC Report take space allocations for Pre-K students into account.

Also in 2023, each school district contracted with NC State’s Operations Research and Education Laboratory (OREd) to complete a “Land Use Study” and student membership projections. OREd’s projection model includes a forecasting component whereas the SAPFO model is mathematically based using historical data and accepted projection methodologies. In December 2024, the Board of County Commissioners authorized notification to the parties of the SAPFO MOU that the student projection methodology will be changed to either the one employed by (OREd) or Carolina Demography. The SAPFO partners were invited to comment on this update and the Board of Commissioners is expected to make a final decision in April 2025 on which methodology is used moving forward. Either projection methodology is expected to use a student generation rate determined by the projection professionals. It is anticipated the SAPFOTAC will evaluate the student generation rates used by the selected professionals for inclusion into the CAPS (Certificate of Adequate Public Schools) process.

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 City School District SAPFO | Orange County School District SAPFO |
|--|--|
| Board of County Commissioners | Board of County Commissioners |
| Carrboro Town Council | Hillsborough Board of Commissioners |
| Chapel Hill Town Council | |
| Chapel Hill-Carrboro School Board | Orange County School Board |

**Planning Directors/School Representatives
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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 City 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:**
Chapel Hill-Carrboro City School District **Orange County School District**
These standards are acceptable at this time. These standards are acceptable at this time.

5. **Recommendation:**
Chapel Hill-Carrboro City 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 City 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:

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:

Section II

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 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.

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

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

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

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

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

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

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

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

Section II

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.

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

2019: No changes at Elementary, Middle, or High School levels.

2020: Increase of 100 seats at the High School level due to renovations at Chapel Hill High School. No changes at Elementary or Middle School levels.

2021: No changes at Elementary, Middle, or High School levels.

2022: No changes at Elementary, Middle, or High School levels.

2023: No changes at Elementary, Middle, or High School levels.

2024: The Woolpert, Inc. *Facility Condition Assessment*, which included updated capacity calculations, was accepted. Additionally, space allocated to Pre-K classrooms has been accounted for. The updates resulted in the following capacity changes:

- Elementary: -349
- Middle: +49
- High: -274

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 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 levels.

2019: No changes at Elementary, Middle, or High School levels.

2020: No changes at the Elementary, Middle, or High School levels.

2021: Increase of 500 seats at the High School level due to the Cedar Ridge High School addition. No changes at Elementary or Middle School levels.

2022: No changes at Elementary, Middle, or High School levels.

2023: No changes at Elementary, Middle, or High School levels.

2024: Capacity was calculated using NCDPI

capacity formulas. Additionally, space allocated to Pre-K classrooms has been accounted for. The updates resulted in the following capacity changes:

- Elementary: +68
- Middle: +129
- High: -237

4. Analysis of Existing Conditions:

Chapel Hill-Carrboro City 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 2024-2025 capacity is noted on Attachment I.B.4

5. Recommendation:

Chapel Hill-Carrboro City 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 2024-2025 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.

Attachment I.B.1 Orange County School Capacity (Elementary, Middle, & High)
 (2023-24)
 (Page 1 of 3)

CHECK-2023-077; 8-9; 12/4/23

Attachment 1

Schools Adequate Public Facilities Ordinance (SAPFO) Capacity, Membership and Change Request Form

School District: Orange County Schools
 SAPFO CAPS Year: November 15, 2023 - November 14, 2024
 Capacity and Membership Submittal Date: November 15, 2023

| Elementary School | Square Feet | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | 2022-2023 Requested Capacity | 2023-2024 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|-------------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Central | 52,492 | 455 | 428 | 428 | 428 | 428 | | 291 | 68.0% |
| Efland Cheeks | 64,316 | 497 | 455 | 455 | 455 | 455 | | 526 | 115.6% |
| Grady Brown | 74,016 | 544 | 490 | 490 | 490 | 490 | | 406 | 82.9% |
| Hillsborough | 51,106 | 471 | 420 | 420 | 420 | 420 | | 437 | 104.0% |
| New Hope | 100,164 | 586 | 526 | 526 | 526 | 526 | | 527 | 100.2% |
| Pathways | 85,282 | 576 | 540 | 540 | 540 | 540 | | 312 | 57.8% |
| River Park | 70,812 | 565 | 502 | 502 | 502 | 502 | | 556 | 110.8% |
| Total | 498,188 | 3,694 | 3,361 | 3,361 | 3,361 | 3,361 | | 3,055 | 90.9% |

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 and Membership Certification:

[Signature]
 Superintendent Date 11/27/23

[Signature]
 BOCC Chair Date 12/4/23

Attachment I.B.1 Orange County School Capacity (Elementary, Middle, & High)
 (2023-24)
 (Page 2 of 3)

Schools Adequate Public Facilities Ordinance (SAPFO) Capacity, Membership and Change Request Form

School District: Orange County Schools
 SAPFO CAPS Year: November 15, 2023 - November 14, 2024
 Capacity and Membership Submittal Date: November 15, 2023

| Middle School | Square Feet | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | 2022-2023 Requested Capacity | 2023-2024 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|---------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| A.L. Stanback | 136,000 | 740 | 740 | 740 | 740 | 740 | | 633 | 85.5% |
| Orange Middle | 107,620 | 726 | 726 | 726 | 726 | 726 | | 535 | 73.7% |
| Gravelly Hill | 123,000 | 700 | 700 | 700 | 700 | 700 | | 411 | 58.7% |
| Total | 366,620 | 2,166 | 2,166 | 2,166 | 2,166 | 2,166 | | 1,579 | 72.9% |

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 and Membership Certification:
 11/27/23
 Superintendent Date


 BOCC Chair Date

Attachment I.B.1 Orange County School Capacity (Elementary, Middle, & High)
 (2023-24)
 (Page 3 of 3)

01#11-2023-071, 8-g; 12/4/23

Schools Adequate Public Facilities Ordinance (SAPFO) Capacity, Membership and Change Request Form

School District: Orange County Schools
 SAPFO CAPS Year: November 15, 2023 - November 14, 2024
 Capacity and Membership Submittal Date: November 15, 2023

| High School | Square Feet | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | 2022-2023 Requested Capacity | 2023-2024 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|--------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Cedar Ridge | 206,900 | 1,000 | 1,000 | 1,500 | 1,500 | 1,500 | | 1,117 | 74.5% |
| Orange | 213,509 | 1,399 | 1,399 | 1,399 | 1,399 | 1,399 | | 1,222 | 87.3% |
| Partnership | 6,600 | 40 | 40 | 40 | 40 | 40 | | 43 | 107.5% |
| Total | 427,009 | 2,439 | 2,439 | 2,939 | 2,939 | 2,939 | | 2,382 | 81.0% |

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 and Membership Certification:

 Superintendent _____ Date 11/27/23


 BOCC Chair _____ Date 12/4/23

Attachment I.B.2 Chapel Hill-Carrboro City School Capacity (Elementary, Middle, & High)
 (2023-24)
 (Page 1 of 3)

OTHER 2023-078; 8-g;
12/4/23

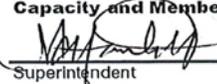
Schools Adequate Public Facilities Ordinance (SAPFO) Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools
 SAPFO CAPS Year: November 15, 2023 - November 14, 2024
 Capacity and Membership Submittal Date: November 15, 2023

| Elementary School | Square Feet | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | 2022-2023 Requested Capacity | 2023-2024 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|-------------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Carrboro | 60,832 | 518 | 518 | 518 | 518 | 518 | | 488 | 94.2% |
| Ephesus | 66,952 | 436 | 436 | 436 | 436 | 436 | | 355 | 81.4% |
| Estes Hills | 56,299 | 516 | 516 | 516 | 516 | 516 | | 339 | 65.7% |
| FP Graham | 66,689 | 522 | 522 | 522 | 522 | 522 | | 509 | 97.5% |
| Glenwood | 50,764 | 412 | 412 | 412 | 412 | 412 | | 411 | 99.8% |
| McDougle | 98,000 | 548 | 548 | 548 | 548 | 548 | | 466 | 85.0% |
| Morris Grove | 90,221 | 568 | 568 | 568 | 568 | 568 | | 397 | 69.9% |
| Northside | 99,500 | 568 | 568 | 568 | 568 | 568 | | 373 | 65.7% |
| Rashkis | 95,729 | 568 | 568 | 568 | 568 | 568 | | 425 | 74.8% |
| Scroggs | 90,980 | 558 | 558 | 558 | 558 | 558 | | 382 | 68.5% |
| Seawell | 52,896 | 450 | 450 | 450 | 450 | 450 | | 430 | 95.6% |
| Total | 828,862 | 5,664 | 5,664 | 5,664 | 5,664 | 5,664 | | 4,575 | 80.8% |

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 and Membership Certification:

 Superintendent Date 11/16/23


 BOCC Chair Date 12/4/23

Attachment I.B.2 Chapel Hill-Carrboro City School Capacity (Elementary, Middle, & High)
 (2023-24)
 (Page 2 of 3)

Schools Adequate Public Facilities Ordinance (SAPFO) Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools
 SAPFO CAPS Year: November 15, 2023 - November 14, 2024
 Capacity and Membership Submittal Date: November 15, 2023

| Middle School | Square Feet | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | 2022-2023 Requested Capacity | 2023-2024 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|---------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Culbreth | 122,467 | 774 | 774 | 774 | 774 | 774 | | 674 | 87% |
| McDougle | 136,221 | 732 | 732 | 732 | 732 | 732 | | 708 | 97% |
| Phillips | 109,498 | 706 | 706 | 706 | 706 | 706 | | 583 | 83% |
| Smith | 128,764 | 732 | 732 | 732 | 732 | 732 | | 751 | 103% |
| Total | 496,950 | 2,944 | 2,944 | 2,944 | 2,944 | 2,944 | | 2,716 | 92.3% |

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 and Membership Certification:

 _____
 Superintendent Date 11/16/23

 _____
 BOCC Chair Date

Attachment I.B.2 Chapel Hill-Carrboro City School Capacity (Elementary, Middle, & High)
 (2023-24)
 (Page 3 of 3)

OTHER-2023-018; 8-g; 12/4/23

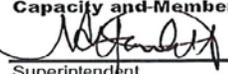
Schools Adequate Public Facilities Ordinance (SAPFO) Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools
 SAPFO CAPS Year: November 15, 2023 - November 14, 2024
 Capacity and Membership Submittal Date: November 15, 2023

| High School | Square Feet | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | 2022-2023 Requested Capacity | 2023-2024 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|------------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Carrboro | 148,023 | 800 | 800 | 800 | 800 | 800 | | 885 | 111% |
| Chapel Hill | 241,111 | 1,520 | 1,520 | 1,620 | 1,620 | 1,620 | | 1,642 | 101% |
| East Chapel Hill | 259,869 | 1,515 | 1,515 | 1,515 | 1,515 | 1,515 | | 1,412 | 93% |
| Phoenix Acad. | 5,207 | 40 | 40 | 40 | 40 | 40 | | 35 | 88% |
| Total | 654,210 | 3,875 | 3,875 | 3,975 | 3,975 | 3,975 | | 3,974 | 100.0% |

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 and Membership Certification:

 Superintendent 11/16/23 Date


 BOCC Chair 12/4/23 Date

Attachment I.B.3 Orange County School Capacity (Elementary, Middle, & High)
 (2024-25)
 (Page 1 of 3)

OTHER - 2025-007; 8-e-1-b;
 2/4/25

Schools Adequate Public Facilities Ordinance (SAPFO) Capacity, Membership and Change Request Form

School District: Orange County Schools
SAPFO CAPS Year: November 15, 2024 - November 14, 2025
Capacity and Membership Submittal Date: November 15, 2024

| Elementary School | Square Feet | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | 2022-2023 Requested Capacity | 2023-2024 Requested Capacity | 2024-2025 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|-------------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Central | 52,492 | 428 | 428 | 428 | 428 | 438 | | 267 | 61.0% |
| Efland Checks | 64,316 | 455 | 455 | 455 | 455 | 476 | | 514 | 108.0% |
| Grady Brown | 74,016 | 490 | 490 | 490 | 490 | 496 | | 403 | 81.3% |
| Hillsborough | 51,106 | 420 | 420 | 420 | 420 | 463 | | 437 | 94.4% |
| New Hope | 100,164 | 526 | 526 | 526 | 526 | 553 | | 523 | 94.6% |
| Pathways | 85,282 | 540 | 540 | 540 | 540 | 452 | | 329 | 72.8% |
| River Park | 70,812 | 502 | 502 | 502 | 502 | 551 | | 521 | 94.6% |
| Total | 498,188 | 0 | 3,361 | 3,361 | 3,361 | 3,429 | | 2,994 | 87.3% |

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 update resulting from use of NCDPI Capacity Formulas

Capacity and Membership Certification:


Digitally signed by Superintendent, DN: cn=Superintendent, o=Orange County Schools, ou=Orange County Schools, email=superintendent@ocps.edu, c=US
 Superintendent Date Jan 17, 2025


 BOCC Chair Date 2/4/25

Attachment I.B.3 Orange County School Capacity (Elementary, Middle, & High)
 (2024-25)
 (Page 2 of 3)

Schools Adequate Public Facilities Ordinance (SAPFO) Capacity, Membership and Change Request Form

School District: Orange County Schools
SAPFO CAPS Year: November 15, 2024 - November 14, 2025
Capacity and Membership Submittal Date: November 15, 2024

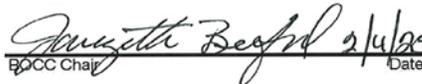
| Middle School | Square Feet | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | 2022-2023 Requested Capacity | 2023-2024 Requested Capacity | 2024-2025 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|---------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| A.L. Stanback | 136,000 | 740 | 740 | 740 | 740 | 844 | | 649 | 76.9% |
| Orange Middle | 107,620 | 726 | 726 | 726 | 726 | 676 | | 519 | 76.8% |
| Gravelly Hill | 123,000 | 700 | 700 | 700 | 700 | 775 | | 414 | 53.4% |
| Total | 366,620 | 2,166 | 2,166 | 2,166 | 2,166 | 2,295 | | 1,582 | 68.9% |

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 update resulting from use of NCDPI Capacity Formulas

Capacity and Membership Certification:

Dundell, January 17, 2025 10:05 EST
 Superintendent Date


 BOCC Chair Date

Attachment I.B.3 Orange County School Capacity (Elementary, Middle, & High)
 (2024-25)
 (Page 3 of 3)

Schools Adequate Public Facilities Ordinance (SAPFO) Capacity, Membership and Change Request Form

School District: Orange County Schools
SAPFO CAPS Year: November 15, 2024 - November 14, 2025
Capacity and Membership Submittal Date: November 15, 2024

| High School | Square Feet | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | 2022-2023 Requested Capacity | 2023-2024 Requested Capacity | 2024-2025 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|--------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Cedar Ridge | 206,900 | 1,000 | 1,500 | 1,500 | 1,500 | 1,328 | | 1,150 | 86.6% |
| Orange | 213,509 | 1,399 | 1,399 | 1,399 | 1,399 | 1,310 | | 1,173 | 89.5% |
| Partnership | 6,600 | 40 | 40 | 40 | 40 | 64 | | 46 | 71.9% |
| Total | 427,009 | 2,439 | 2,939 | 2,939 | 2,939 | 2,702 | | 2,369 | 80.6% |

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.

Change to Partnership Academy to reflect updated capacity for new facility (moved in SY23-24).

Capacity and Membership Certification:

Danella J. Johnson
 Superintendent
 Jan 17, 2025
 Date


 BOCC Chair
 2/4/25
 Date

Attachment I.B.4 Chapel Hill-Carrboro City School Capacity (Elementary, Middle, & High)
 (2024-25)
 (Page 1 of 3)

CHCL-2025-006; 8-C; 2/4/25

Attachment 1

Schools Adequate Public Facilities Ordinance (SAPFO) Capacity, Membership and Change Request Form

School District: Chapel Hill-Carrboro City Schools
 SAPFO CAPS Year: November 15, 2024 - November 14, 2025
 Capacity and Membership Submittal Date: November 15, 2024

| Elementary School | Square Feet | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | 2022-2023 Requested Capacity | 2023-2024 Requested Capacity | 2024-2025 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|-------------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Carrboro | 60,832 | 518 | 518 | 518 | 518 | 500 | | 482 | 96.4% |
| Ephesus | 66,952 | 436 | 436 | 436 | 436 | 493 | | 359 | 72.8% |
| Estes Hills | 56,299 | 516 | 516 | 516 | 516 | 500 | | 323 | 64.6% |
| FP Graham | 66,689 | 522 | 522 | 522 | 522 | 542 | | 510 | 94.1% |
| Glenwood | 50,764 | 412 | 412 | 412 | 412 | 400 | | 385 | 96.3% |
| McDougle | 98,000 | 548 | 548 | 548 | 548 | 537 | | 477 | 88.8% |
| Morris Grove | 90,221 | 568 | 568 | 568 | 568 | 519 | | 377 | 72.6% |
| Northside | 99,500 | 568 | 568 | 568 | 568 | 523 | | 395 | 75.5% |
| Rashkis | 95,729 | 568 | 568 | 568 | 568 | 486 | | 433 | 89.1% |
| Scroggs | 90,980 | 558 | 558 | 558 | 558 | 482 | | 384 | 79.7% |
| Seawell | 52,896 | 450 | 450 | 450 | 450 | 333 | | 393 | 118.0% |
| Total | 828,862 | 5,664 | 5,664 | 5,664 | 5,664 | 5,315 | | 4,518 | 85.0% |

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 update resulting from Woolpert study.

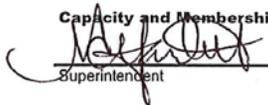
Capacity and Membership Certification

 Superintendent Date 11/19/24


 BOCC Chair Date 2/4/25

Attachment I.B.4 Chapel Hill-Carrboro City School Capacity (Elementary, Middle, & High)
 (2024-25)
 (Page 2 of 3)

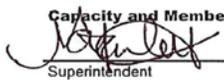
| Schools Adequate Public Facilities Ordinance (SAPFO) Capacity, Membership and Change Request Form | | | | | | | | | |
|--|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| School District: Chapel Hill-Carrboro City Schools | | | | | | | | | |
| SAPFO CAPS Year: November 15, 2024 - November 14, 2025 | | | | | | | | | |
| Capacity and Membership Submittal Date: November 15, 2024 | | | | | | | | | |
| Middle School | Square Feet | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | 2022-2023 Requested Capacity | 2023-2024 Requested Capacity | 2024-2025 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
| Culbreth | 122,467 | 774 | 774 | 774 | 774 | 775 | | 635 | 82% |
| McDougle | 136,221 | 732 | 732 | 732 | 732 | 772 | | 658 | 85% |
| Phillips | 109,498 | 706 | 706 | 706 | 706 | 734 | | 600 | 82% |
| Smith | 128,764 | 732 | 732 | 732 | 732 | 712 | | 763 | 107% |
| Total | 496,950 | 2,944 | 2,944 | 2,944 | 2,944 | 2,993 | | 2,656 | 88.7% |
| 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 update resulting from Woolpert study. | | | | | | | | | |

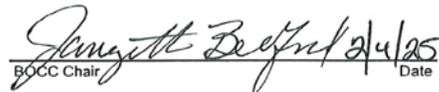
Capacity and Membership Certification:

 Superintendent _____ Date 11/19/24


 BOCC Chair _____ Date 2/4/25

Attachment I.B.4 Chapel Hill-Carrboro City School Capacity (Elementary, Middle, & High)
 (2024-25)
 (Page 3 of 3)

| Schools Adequate Public Facilities Ordinance (SAPFO) Capacity, Membership and Change Request Form | | | | | | | | | |
|--|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| School District: Chapel Hill-Carrboro City Schools | | | | | | | | | |
| SAPFO CAPS Year: November 15, 2024 - November 14, 2025 | | | | | | | | | |
| Capacity and Membership Submittal Date: November 15, 2024 | | | | | | | | | |
| High School | Square Feet | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | 2022-2023 Requested Capacity | 2023-2024 Requested Capacity | 2024-2025 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
| Carrboro | 148,023 | 800 | 800 | 800 | 800 | 851 | | 893 | 105% |
| Chapel Hill | 241,111 | 1,520 | 1,620 | 1,620 | 1,620 | 1,535 | | 1,606 | 105% |
| East Chapel Hill | 259,869 | 1,515 | 1,515 | 1,515 | 1,515 | 1,275 | | 1,419 | 111% |
| Phoenix Acad. | 5,207 | 40 | 40 | 40 | 40 | 40 | | 40 | 100% |
| Total | 654,210 | 3,875 | 3,975 | 3,975 | 3,975 | 3,701 | | 3,958 | 106.9% |
| 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 update resulting from Woolpert study. | | | | | | | | | |

Capacity and Membership Certification:

 Superintendent _____ Date 11/19/24


 BOCC Chair _____ Date 2/4/25

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 City School District | Orange County School District |
| November 15 of each year | November 15 of each year |
4. **Analysis of Existing Conditions:**

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

| | |
|--|--------------------------------------|
| Chapel Hill-Carrboro City School District | Orange County School District |
| No change at this time. | No change at this time. |

II. Annual Update to Schools Adequate Public Facilities Ordinance System

A. Capital Investment Plan (CIP)

1. **Responsible Entity for Suggesting Change** – The updating of this section will be conducted by the Board of County Commissioners (BOCC) after review of the CIP requests from the School Districts. Action regarding CIP programs usually occurs during the BOCC budget Public Hearing process in the winter and spring of each year. The development of the CIP considers the conditions noted in the SAPFOTAC report released in the same CIP development year including LOS (level of service), capacity, and membership projections.
2. **Definition** – The process and resultant program to determine school needs and provide funding for new school facilities through a variety of funding mechanisms.
3. **Standard for:**

| | |
|--|--------------------------------------|
| Chapel Hill-Carrboro City 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, 2025.
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 City School District

Standard for:

Orange County School District

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

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

Performance of the models is monitored each year. The value of a projection model is in its prediction of school level capacities at least three years in advance of capacity shortfalls so the annual Capital Investment Plan (CIP) updates can respond proactively with siting, design, and construction. Attachment II.B.1 includes a description of each model. Attachment II.B.3 shows the performance of the models for the 2024-25 school year from the prior year projection.

Analysis on the accuracy of the results is showing fairly accurate results, particularly for the average of all five models. Orange County Schools has lower enrollment numbers than 10 years ago at all three school levels (Elementary, Middle, and High). Chapel Hill-Carrboro City Schools has lower enrollment numbers than 10 years ago at the Elementary and Middle levels while the High School level has experienced enrollment growth over the past 10 years. 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

Section II

until actual students are enrolled. The system is updated in November of each year, becoming part of the historical projection base.

5. Recommendation:

In 2023, each school district contracted with NC State's Operations Research and Education Laboratory (OREd) to complete a "Land Use Study" and student membership projections. OREd's projection model includes a forecasting component whereas the SAPFO model is mathematically based using historical data and accepted projection methodologies. In December 2024, the Board of County Commissioners authorized notification to the parties of the SAPFO MOU that the student projection methodology will be changed to either the one employed by (OREd) or Carolina Demography. The SAPFO partners were invited to comment on this update and the Board of Commissioners is expected to make a final decision in April 2025 on which methodology is used moving forward.

Attachment II.B.I – Student Membership Projection Descriptions

STUDENT MEMBERSHIP PROJECTIONS

| PROJECTION TYPE | DESCRIPTION / CHARACTERISTICS | FORMULA | ASSUMPTIONS |
|-------------------------------|--|--|--|
| Tischler Linear (OCS & CHCCS) | Mathematical formula; straight line projection | $y=(c*b)^x+y+b$ 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 |

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Orange County School District
School Membership 2023-2024 School Year (November 15, 2023)

| | 11/15/22 Actual 2022-23 | 2023 Report Projection for 2023-24 | 11/15/23 Actual 2023-24 | Change between actual Nov 2021 - Nov 2022 |
|-------------------|-------------------------------|--|-------------------------------|--|
| Elementary | 3059 | | 3055 | - 4 |
| Model | | | Projection is | |
| T | | 3038 | L17 | |
| OCP | | 3040 | L15 | |
| 10C | | 3083 | H28 | |
| 5C | | 3088 | H33 | |
| 3C | | 3066 | H11 | |
| Average | | 3063 | H8 | |
| | 11/15/22 | | 11/15/23 | |
| Middle | 1598 | | 1579 | -19 |
| Model | | | Projection is | |
| T | | 1587 | H8 | |
| OCP | | 1648 | H69 | |
| 10C | | 1576 | L3 | |
| 5C | | 1563 | L16 | |
| 3C | | 1568 | L11 | |
| Average | | 1588 | H9 | |
| | 11/15/22 | | 11/15/23 | |
| High | 2487 | | 2382 | -105 |
| Model | | | Projection is | |
| T | | 2470 | H88 | |
| OCP | | 2415 | H33 | |
| 10C | | 2445 | H63 | |
| 5C | | 2452 | H70 | |
| 3C | | 2451 | H69 | |
| Average | | 2446 | H64 | |
| Totals | 11/15/22 | | 11/15/23 | |
| Elementary | 3059 | | 3055 | |
| Middle | 1598 | | 1579 | |
| High | <u>2487</u> | | <u>2382</u> | |
| Total | 7144 | | 7016 | -128 |
| Model | | | Projection is | |
| T | | 7095 | H79 | |
| OCP | | 7103 | H87 | |
| 10C | | 7104 | H88 | |
| 5C | | 7103 | H87 | |
| 3C | | 7085 | H69 | |
| Average | | 7097 | H81 | |

H means High L means Low

**Orange County School District
 School Membership 2023-2024 School Year (November 15, 2023)**

Statistical Findings

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

Elementary School Level

- Projections were mixed, ranging from 17 students below to 33 students above actual membership. On average, the projections were 9 students above actual membership.
- The membership actually decreased by 4 students between November 15, 2022 and November 14, 2023.

Middle School Level

- Projections were mixed, ranging from 3 students below to 69 students above actual membership. On average, the projections were 9 students above actual membership.
- The membership actually decreased by 19 students between November 15, 2022 and November 14, 2023.

High School Level

- Projections were high, ranging from 33 students to 88 students above actual membership. On average, the projections were 64 students above actual membership.
- The membership actually decreased by 105 students between November 15, 2022 and November 14, 2023.

TOTAL

- The totals of all school level projections were all high, ranging from 69 to 88 students above actual membership. On average, the projections were 81 students above actual membership.
- The membership decreased in total by 128 students, which is the sum of -4 at Elementary, -19 at Middle, and -105 at High.

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Chapel Hill-Carrboro City School District
School Membership 2023-2024 School Year (November 15, 2023)

| | 11/15/22 Actual 2022-23 | 2023 Report Projection for 2023-24 | 11/15/23 Actual 2023-24 | Change between actual Nov 2022 - Nov 2023 |
|-------------------|-------------------------------|--|-------------------------------|--|
| Elementary | 4657 | | 4575 | - 82 |
| Model | | | Projection is | |
| T | | 4624 | H49 | |
| OCP | | 4588 | H13 | |
| 10C | | 4582 | H7 | |
| 5C | | 4561 | L14 | |
| 3C | | 4550 | L25 | |
| Average | | 4581 | H6 | |
| | 11/15/22 | | 11/15/23 | |
| Middle | 2798 | | 2716 | - 82 |
| Model | | | Projection is | |
| T | | 2778 | H62 | |
| OCP | | 2742 | H26 | |
| 10C | | 2685 | L31 | |
| 5C | | 2683 | L33 | |
| 3C | | 2660 | L56 | |
| Average | | 2710 | L6 | |
| | 11/15/22 | | 11/15/23 | |
| High | 3950 | | 3974 | + 24 |
| Model | | | Projection is | |
| T | | 3922 | L52 | |
| OCP | | 3860 | L114 | |
| 10C | | 3923 | L51 | |
| 5C | | 3938 | L36 | |
| 3C | | 3925 | L49 | |
| Average | | 3914 | L60 | |
| Totals | 11/15/22 | | 11/15/23 | |
| Elementary | 4657 | | 4575 | |
| Middle | 2798 | | 2716 | |
| High | 3950 | | 3974 | |
| Total | 11,405 | | 11,265 | - 140 |
| Model | | | Projection is | |
| T | | 11,324 | H59 | |
| OCP | | 11,190 | L75 | |
| 10C | | 11,190 | L75 | |
| 5C | | 11,182 | L83 | |
| 3C | | 11,135 | L130 | |
| Average | | 11,205 | L60 | |

H means High L means Low

**Chapel Hill-Carrboro City School District
School Membership 2023-2024 School Year (November 15, 2023)**

Statistical Findings

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

Elementary School Level

- Projections were mixed ranging from 25 students below to 49 students above actual membership. On average, the projections were 6 students above the actual membership.
- The actual membership decreased by 82 students between November 15, 2022 and November 14, 2023.

Middle School Level

- Projections were mixed, ranging from 56 students below to 62 students above actual membership. On average, the projections were 6 students below the actual membership.
- The actual membership decreased by 82 students between November 15, 2022 and November 14, 2023.

High School Level

- Projections were low, ranging from 36 students to 114 students below actual membership. On average, the projections were 60 students below actual membership.
- The actual membership increased by 24 students between November 15, 2022 and November 14, 2023.

TOTAL

- The totals of all school level projections were mixed, ranging from 130 students below to 59 students above actual membership. On average, the projections were 60 students below the actual membership.
- The membership decreased in total by 140 students, which is the sum of -82 at Elementary, -82 at Middle, and +24 at High.

**Orange County School District
 School Membership 2024-2025 School Year (November 15, 2024)**

| | 11/15/23 Actual 2023-24 | 2024 Report Projection for 2024-25 | 11/15/24 Actual 2024-25 | Change between actual Nov 2023 - Nov 2024 |
|-------------------|-------------------------------|--|-------------------------------|--|
| Elementary | 3055 | | 2994 | -61 |
| Model | | | Projection is | |
| T | | 3032 | H38 | |
| OCP | | 3025 | H31 | |
| 10C | | 2987 | L7 | |
| 5C | | 2990 | L4 | |
| 3C | | 3020 | H26 | |
| Average | | 3011 | H17 | |
| | 11/15/23 | | 11/15/24 | |
| Middle | 1579 | | 1582 | +3 |
| Model | | | Projection is | |
| T | | 1567 | L15 | |
| OCP | | 1564 | L18 | |
| 10C | | 1577 | L5 | |
| 5C | | 1569 | L13 | |
| 3C | | 1585 | H3 | |
| Average | | 1572 | L10 | |
| | 11/15/23 | | 11/15/24 | |
| High | 2382 | | 2369 | -13 |
| Model | | | Projection is | |
| T | | 2364 | L5 | |
| OCP | | 2359 | L10 | |
| 10C | | 2383 | H13 | |
| 5C | | 2392 | H23 | |
| 3C | | 2386 | H17 | |
| Average | | 2377 | H8 | |
| Totals | 11/15/23 | | 11/15/24 | |
| Elementary | 3055 | | 2994 | |
| Middle | 1579 | | 1582 | |
| High | <u>2382</u> | | <u>2369</u> | |
| Total | 7016 | | 6945 | -71 |
| Model | | | Projection is | |
| T | | 6963 | H18 | |
| OCP | | 6948 | H3 | |
| 10C | | 6947 | H2 | |
| 5C | | 6951 | H6 | |
| 3C | | 6991 | H46 | |
| Average | | 6960 | H15 | |

H means High L means Low

**Orange County School District
 School Membership 2024-2025 School Year (November 15, 2024)**

Statistical Findings

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

Elementary School Level

- Projections were mixed, ranging from 7 students below to 38 students above actual membership. On average, the projections were 17 students above actual membership.
- The membership actually decreased by 61 students between November 15, 2023 and November 15, 2024.

Middle School Level

- Projections were mostly low, ranging from 18 students below to 3 students above actual membership. On average, the projections were 10 students below actual membership.
- The membership actually increased by 3 students between November 15, 2023 and November 15, 2024.

High School Level

- Projections were mixed, ranging from 10 students below to 23 students above actual membership. On average, the projections were 8 students above actual membership.
- The membership actually decreased by 13 students between November 15, 2023 and November 15, 2024.

TOTAL

- The totals of all school level projections were all high, ranging from 2 to 46 students above actual membership. On average, the projections were 15 students above actual membership.
- The membership decreased in total by 71 students, which is the sum of -61 at Elementary, +3 at Middle, and -13 at High.

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Chapel Hill-Carrboro City School District
 School Membership 2024-2025 School Year (November 15, 2024)

| | 11/15/23 Actual 23-24 | 2024 Report Projection for 2024-25 | 11/15/24 Actual 2024-25 | Change between actual Nov 2023 - Nov 2024 |
|-------------------|-----------------------------|--|-------------------------------|--|
| Elementary | 4575 | | 4518 | - 57 |
| Model | | | Projection is | |
| T | | 4538 | H20 | |
| OCP | | 4454 | L64 | |
| 10C | | 4375 | L143 | |
| 5C | | 4374 | L144 | |
| 3C | | 4440 | L78 | |
| Average | | 4436 | L82 | |
| | 11/15/23 | | 11/15/24 | |
| Middle | 2716 | | 2656 | - 60 |
| Model | | | Projection is | |
| T | | 2694 | H38 | |
| OCP | | 2644 | L12 | |
| 10C | | 2659 | H3 | |
| 5C | | 2652 | L4 | |
| 3C | | 2697 | H41 | |
| Average | | 2669 | H13 | |
| | 11/15/23 | | 11/15/24 | |
| High | 3974 | | 3958 | -16 |
| Model | | | Projection is | |
| T | | 3942 | L16 | |
| OCP | | 3869 | L89 | |
| 10C | | 3933 | L25 | |
| 5C | | 3933 | L25 | |
| 3C | | 3953 | L5 | |
| Average | | 3926 | L32 | |
| Totals | 11/15/23 | | 11/15/24 | |
| Elementary | 4575 | | 4518 | |
| Middle | 2716 | | 2656 | |
| High | 3974 | | 3958 | |
| Total | 11,265 | | 11,132 | - 133 |
| Model | | | Projection is | |
| T | | 11,174 | H42 | |
| OCP | | 10,967 | L165 | |
| 10C | | 10,967 | L165 | |
| 5C | | 10,959 | L173 | |
| 3C | | 11,090 | L42 | |
| Average | | 11,031 | L101 | |

H means High L means Low

**Chapel Hill-Carrboro City School District
School Membership 2024-2025 School Year (November 15, 2024)**

Statistical Findings

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

Elementary School Level

- Projections were mostly low, ranging from 144 students below to 20 students above actual membership. On average, the projections were 82 students below the actual membership.
- The actual membership decreased by 57 students between November 15, 2023 and November 15, 2024.

Middle School Level

- Projections were mixed, ranging from 12 students below to 41 students above actual membership. On average, the projections were 13 students above the actual membership.
- The actual membership decreased by 60 students between November 15, 2023 and November 15, 2024.

High School Level

- Projections were low, ranging from 5 students to 89 students below actual membership. On average, the projections were 32 students below actual membership.
- The actual membership decreased by 16 students between November 15, 2023 and November 15, 2024.

TOTAL

- The totals of all school level projections were mostly low, ranging from 173 students below to 42 students above actual membership. On average, the projections were 101 students below the actual membership.
- The membership decreased in total by 133 students, which is the sum of -57 at Elementary, -60 at Middle, and -16 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:**

Chapel Hill-Carrboro City School District

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

Standard for:

Orange County School District

The 5 model average discussed in Section II.B (Student Projection Methodology). See Attachment II.C.3

4. **Analysis of Existing Conditions**

The membership figures and percentage growth on the attachments show a decrease and negative growth rate for all three school levels in Chapel Hill-Carrboro City Schools in the 10-year projection period. Orange County Schools (OCS) projections show a relatively flat rate of growth at Elementary level, with an overall increase of only 19 students in the 10-year projection period. At the Middle and High School levels, OCS projections show a negative growth rate. 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, 2024) memberships. Ten years of student membership were projected thereafter.

Chapel Hill-Carrboro City School District

Elementary

The previous year (2023-24) projections for November 2024 at this level were overestimated by 82 students. The actual membership decreased by 57 students. Over the past ten years, this level

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has experienced a decrease in nine out of ten school years, including this year. Growth rates during the past ten years have ranged from -8.76% to +1.20%. Capacity was decreased by 349 students in 24-25 as a result of accepting the capacities calculated by the Woolpert, Inc. study. The need for an additional elementary school is not anticipated in the 10-year projection period.

Middle

The previous year (2023-24) projections for November 2024 for this level were overestimated by 13 students. The actual membership decreased by 60 students. Over the past ten years, this level has shown varying increases and decreases. Growth rates during this time period have ranged from -4.17% to +3.53%. Capacity was increased by 49 students in 24-25 as a result of accepting the capacities calculated by the Woolpert, Inc. study. The need for an additional middle school is not anticipated in the 10-year projection period.

High School

The previous year (2023-24) projections for November 2024 for this level were underestimated by 32 students. The actual membership decreased by 16 students. Over the past ten years, this level has shown varying increases and decreases. Growth rates during this time period have ranged from -0.90 to +4.39%. Capacity was decreased by 274 students in 24-25 as a result of accepting the capacities calculated by the Woolpert, Inc. study. The need for additional high school capacity at Carrboro High School is not anticipated in the 10-year projection period.

Orange County School District

Elementary

The previous year (2023-24) projections for November 2024 at this level were overestimated by 17 students. Actual membership decreased by 61 students. Over the past ten years, this level experienced varying increases and decreases. Growth rates during this period have ranged from -5.72% to +1.81%. Capacity was increased by 68 students in 24-25 as a result of recalculating capacities to reflect NCDPI capacity formulas. The need for an additional Elementary School is not anticipated in the 10-year projection period.

Middle

The previous year (2023-24) projections for November 2024 for this level were underestimated by 10 students. The actual membership increased by 3 students. Over the past ten years, this level has experienced varying increases and decreases. Growth rates during this period have ranged from -6.18% to +2.83%. The need for an additional Middle School is not anticipated in the 10-year projection period.

Section II

High School

The previous year (2023-24) projections for November 2024 for this level were overestimated by 8 students. The actual membership decreased by 13 students. Over the past ten years, this level has experienced varying increases and decreases. Growth rates during this period ranged from -4.22% to +3.35%. Capacity was decreased by 237 students in 24-25 as a result of recalculating capacities to reflect NCDPI capacity formulas. The need for an additional high school is not anticipated in the 10-year projection period.

5. Recommendation:

Use statistics as noted in 3 above

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 City School District

See Attachment II.D.2

4. Analysis of Existing Conditions:

Chapel Hill-Carrboro City School District

The membership figures and percentage growth on the attachments show a decline in student membership at each school level within the system. Projected Average Annual Growth Rate over next ten years:

| School Level | Year Projection Made | | | | |
|-------------------|----------------------|-----------|-----------|-----------|-----------|
| | 2020-2021 | 2021-2022 | 2022-2023 | 2023-2024 | 2024-2025 |
| Elementary | -0.23% | -0.88% | -0.47% | -1.14% | -0.37% |
| Middle | -1.50% | -2.10% | -1.77% | -1.96% | -1.24% |
| High | -1.44% | -2.15% | -2.09% | -1.83% | -1.74% |

5. Recommendation:

Chapel Hill-Carrboro City School District

Use statistics as noted for this year. In December 2024, the Board of County Commissioners authorized notification to the parties of the SAPFO MOU that the student projection methodology will be changed to either the one employed by (OREd) or Carolina

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 a decline in student membership at each school level within the system. Projected Average Annual Growth Rate over next ten years:

| School Level | Year Projection Made | | | | |
|-------------------|----------------------|-----------|-----------|-----------|-----------|
| | 2020-2021 | 2021-2022 | 2022-2023 | 2023-2024 | 2024-2025 |
| Elementary | -0.02% | -0.04% | 0.26% | -0.14% | -0.10% |
| Middle | -0.67% | -0.72% | -0.15% | -0.44% | -0.52% |
| High | -0.98% | -1.06% | 0.98% | -0.91% | -0.10% |

Recommendation:

Orange County School District

Use statistics as noted for this year. In December 2024, the Board of County Commissioners authorized notification to the parties of the SAPFO MOU that the student projection methodology will be changed to either the one employed by

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Demography. The SAPFO partners were invited to comment on this update and the Board of Commissioners is expected to make a final decision in April 2025 on which methodology is used moving forward.

(OREd) or Carolina Demography. The SAPFO partners were invited to comment on this update and the Board of Commissioners is expected to make a final decision in April 2025 on which methodology is used moving forward.

2023-2024

Orange County Student Projections

Elementary

| School Year | 2023-2024 (actual) | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 | 2031-2032 | 2032-2033 | 2033-2034 |
|--------------------|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership | 3,055 | 3,011 | 2,985 | 2,970 | 2,964 | 2,950 | 2,961 | 2,975 | 2,985 | 2,996 | 3,012 |
| Average % Increase | -0.13% | -1.44% | -0.85% | -0.49% | -0.21% | -0.50% | 0.36% | 0.50% | 0.34% | 0.36% | 0.52% |

Middle

| School Year | 2023-2024 (actual) | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 | 2031-2032 | 2032-2033 | 2033-2034 |
|--------------------|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership | 1,579 | 1,572 | 1,586 | 1,593 | 1,562 | 1,539 | 1,524 | 1,516 | 1,497 | 1,502 | 1,509 |
| Average % Increase | -1.19% | -0.42% | 0.88% | 0.43% | -1.92% | -1.47% | -0.98% | -0.56% | -1.25% | 0.34% | 0.51% |

High School

| School Year | 2023-2024 (actual) | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 | 2031-2032 | 2032-2033 | 2033-2034 |
|--------------------|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership | 2,382 | 2,377 | 2,306 | 2,259 | 2,270 | 2,268 | 2,250 | 2,251 | 2,229 | 2,184 | 2,172 |
| Average % Increase | -4.22% | -0.23% | -2.95% | -2.04% | 0.48% | -0.11% | -0.77% | 0.06% | -1.00% | -2.01% | -0.55% |

Chapel Hill/Carrboro Student Projections

Elementary

| School Year | 2023-2024 (actual) | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 | 2031-2032 | 2032-2033 | 2033-2034 |
|--------------------|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership | 4,575 | 4,436 | 4,291 | 4,191 | 4,134 | 4,049 | 4,048 | 4,053 | 4,057 | 4,064 | 4,074 |
| Average % Increase | -1.76% | -3.03% | -3.28% | -2.32% | -1.38% | -2.05% | -0.02% | 0.13% | 0.10% | 0.16% | 0.25% |

Middle

| School Year | 2023-2024 (actual) | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 | 2031-2032 | 2032-2033 | 2033-2034 |
|--------------------|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership | 2,716 | 2,669 | 2,619 | 2,590 | 2,504 | 2,459 | 2,359 | 2,305 | 2,220 | 2,222 | 2,226 |
| Average % Increase | -2.93% | -1.72% | -1.88% | -1.10% | -3.34% | -1.79% | -4.04% | -2.29% | -3.69% | 0.07% | 0.18% |

High School

| School Year | 2023-2024 (actual) | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 | 2031-2032 | 2032-2033 | 2033-2034 |
|--------------------|--------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership | 3,974 | 3,926 | 3,904 | 3,805 | 3,741 | 3,681 | 3,602 | 3,531 | 3,476 | 3,347 | 3,249 |
| Average % Increase | 0.61% | -1.20% | -0.55% | -2.54% | -1.69% | -1.61% | -2.15% | -1.98% | -1.55% | -3.72% | -2.90% |

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 City School District See Attachment II.E.1 | Standard for: Orange County School District See Attachment II.E.1 |
|---|---|
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:

In December 2024, the Board of County Commissioners authorized notification to the parties of the SAPFO MOU that the student projection methodology will be changed to either the one employed by (OREd) or Carolina Demography. The SAPFO partners were invited to comment on this update and the Board of Commissioners is expected to make a final decision in April 2025 on which methodology is used moving forward. Either projection methodology is expected to use a student generation rate determined by the projection professionals. It is anticipated the SAPFOTAC will evaluate the student generation rates used by the selected professionals for inclusion into the CAPS (Certificate of Adequate Public Schools) process.

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)

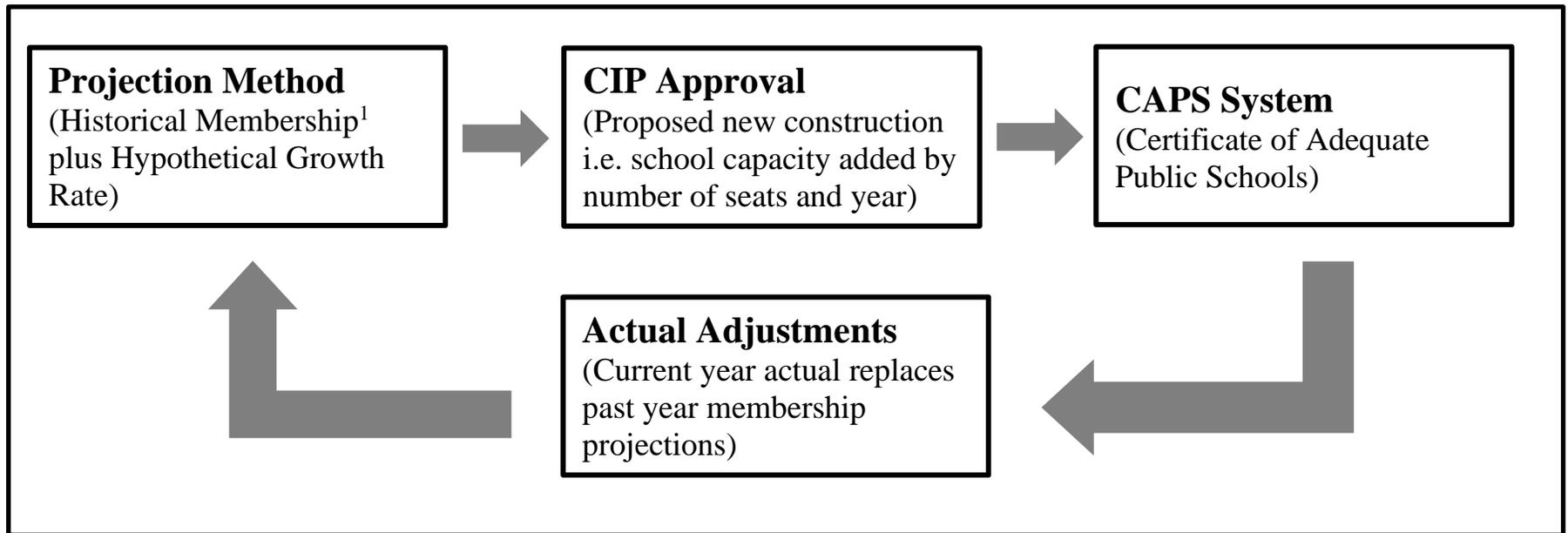
Timeframe: In November of each year, Student Membership and Building Capacity is transmitted from the school districts to the Orange County Board of Commissioners for consideration and approval and used in the following years CIP (e.g. November 15, 2023 membership numbers used to develop a CIP to be considered for adoption in June 2024).

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.

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. For example, the SAPFO system for both school districts that will be established / initiated /

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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 2024 - 2034)

November 2022 – June 2023 (using 2023 SAPFOTAC Report)

SAPFO CAPS Process 2 (for SAPFO System 2024 – 2025)

November 2023 - November 2024

School Adequate Public Facilities Ordinance

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

2024 CAPS system is effective November 15, 2023 through November 14, 2024.

The system is updated with new membership, CIP capacity changes, and any other BOCC/School District joint action approved capacity prior to November 15, 2023. 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, 2023.

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 System²

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

$AC \geq 0$ - Issue CAPS

$AC < 0$ - Defer CAPS to later date

¹ Student 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.

² AC – 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