



# TOWN OF CHAPEL HILL

## Town Council Meeting Agenda

Town Hall  
405 Martin Luther King Jr.  
Boulevard  
Chapel Hill, NC 27514

Mayor Pam Hemminger  
Mayor pro tem Karen Stegman  
Council Member Jessica Anderson  
Council Member Camille Berry  
Council Member Tai Huynh

Council Member Paris Miller-Foushee  
Council Member Michael Parker  
Council Member Amy Ryan  
Council Member Adam Searing

**Wednesday, April 27, 2022 7:00 PM**

**Virtual Meeting**

### Language Access Statement

For interpretation or translation services, call 919-969-5105.

ဘာသာပြန်ဆိုခြင်းနှင့် စကားပြန်ခြင်းအတွက်၊ (၉၁၉) ၉၆၉-၅၁၀၅ ကိုဖုန်းခေါ်ပါ။

Para servicios de interpretación o traducción, llame al 919-969-5105.

လၢတၢ်ကတိၤကျိးထံ မ့တမၢ် လၢတၢ်ကွဲးကျိးထံအတၢ်မၤစၢၤအဂီၢ် ၼ် ကိးဘၣ် (၉၁၉)-၉၆၉-၅၁၀၅

如需口头或  
书面翻译服  
务，请拨打  
919-969-5105.

### Virtual Meeting Notification

*Town Council members will attend and participate in this meeting remotely, through internet access, and will not physically attend. The Town will not provide a physical location for viewing the meeting.*

*The public is invited to attend. The Town of Chapel Hill wants to know more about who participates in its programs and processes, including Town Council business meetings and work sessions. Please participate in a voluntary demographic survey <https://www.townofchapelhill.org/demosurvey> before accessing the Zoom webinar registration. After registering, you will receive a confirmation email containing information about joining the webinar in listen-only mode. Phone: 301-715-8592, Meeting ID: 880 4229 5865*

*View Council meetings live at <https://chapelhill.legistar.com/Calendar.aspx> – and on Chapel Hill Gov-TV ([townofchapelhill.org/GovTV](http://townofchapelhill.org/GovTV)).*

### OPENING

### ROLL CALL

## **PUBLIC COMMENT FOR ITEMS NOT ON PRINTED AGENDA AND PETITIONS FROM THE PUBLIC AND COUNCIL MEMBERS**

*Petitions and other similar requests submitted by the public, whether written or oral, are heard at the beginning of each regular meeting. Except in the case of urgency and unanimous vote of the Council members present, petitions will not be acted upon at the time presented. After receiving a petition, the Council shall, by simple motion, dispose of it as follows: consideration at a future regular Council meeting; referral to another board or committee for study and report; referral to the Town Manager for investigation and report; receive for information. See the Status of Petitions to Council webpage to track the petition. Receiving or referring of a petition does not constitute approval, agreement, or consent.*

1. Moriah Ridge, LLC. Request to Amend Consent [\[22-0341\]](#)  
Judgement to Permit the City of Durham to Annex a  
Property off of Mt. Moriah Road.

## **ANNOUNCEMENTS BY COUNCIL MEMBERS**

### **CONSENT**

*Items of a routine nature will be placed on the Consent Agenda to be voted on in a block. Any item may be removed from the Consent Agenda by request of the Mayor or any Council Member.*

2. Approve all Consent Agenda Items. [\[22-0342\]](#)  
  
By adopting the resolution, the Council can approve various resolutions and ordinances all at once without voting on each resolution or ordinance separately.
3. Amend Chapter 2, Article IV, Section 2-72 of the Town Code of Ordinances Regarding Campaign Contribution Limitations. [\[22-0343\]](#)  
  
By enacting the ordinance, the Council decreases the municipal campaign maximum contribution to \$357.00 and the contribution disclosure exemption to \$37.00 as required by ordinance.
4. Endorse the County-Wide Coordinated Manufactured Homes Action Plan. [\[22-0309\]](#)  
  
By adopting the resolution, the Council endorses the County-Wide Manufactured Homes Action Plan.
5. Call a Public Hearing to Consider a Request to Close a Portion of an Unmaintained and Unimproved Public [\[22-0344\]](#)



Right-of-Way of Stinson Street on June 8, 2022.

By adopting the resolution, the Council calls a Public Hearing to consider closing a portion of the unmaintained and unimproved Stinson Street public right-of-way on June 8th, 2022.

**6. Amend the 2021-22 Council Calendar.**

**[22-0345]**

By adopting the resolution, the Council amends the 2021-21 Council calendar to schedule a meeting with the State Legislative representatives from Orange County on May 19.

## INFORMATION

**7. Receive Upcoming Public Hearing Items and Petition Status List.**

**[22-0346]**

By accepting the report, the Council acknowledges receipt of the Scheduled Public Hearings and Status of Petitions to Council lists.

**8. Receive the Schools Adequate Public Facilities Ordinance (SAPFO) 2022 Annual Technical Advisory Committee Report.**

**[22-0347]**

By accepting the report, the Council receives the Schools Adequate Public Facilities Ordinance (SAPFO) 2022 Annual Technical Advisory Committee Report.

## DISCUSSION

**9. Consider an Application for Conditional Zoning for 751 Trinity Court from Residential-4 (R-4) to Residential-Special Standards-Conditional Zoning District (R-SS-CZD)**

**[22-0348]**

PRESENTER: Anya Grahm, Principal Planner

- a. Without objection, the revised report and any other materials submitted at the hearing for consideration by the Council will be entered into the record
- b. Introduction and revised recommendation
- c. Presentation by the applicant
- d. Comments from the public
- e. Comments and questions from the Mayor and Town Council
- f. Motion to close the Legislative Hearing.
- g. Motion to adopt the Resolution of Consistency and Reasonableness with the Comprehensive Plan.
- h. Motion of enact an Ordinance to rezone the property.

RECOMMENDATION: That the Council adopt Resolution A and enact Ordinance A, approving the Conditional Zoning Application.

- 10.** Consider an Application for Conditional Zoning for 110 Jay Street from Residential-3 (R-3) to Residential-Special Standards-Conditional Zoning District (R-SS-CZD). [\[22-0349\]](#)

PRESENTER: Becky McDonnell, Senior Planner

- a. Without objection, the revised report and any other materials submitted at the hearing for consideration by the Council will be entered into the record
- b. Introduction and revised recommendation
- c. Presentation by the applicant
- d. Comments from the public
- e. Comments and questions from the Mayor and Town Council
- f. Motion to close the Legislative Hearing
- g. Motion to adopt the Resolution of Consistency and Reasonableness with the Comprehensive Plan.
- h. Motion of enact an Ordinance to rezone the property.

RECOMMENDATION: That the Council adopt Resolution A and enact Ordinance A, approving the Conditional Zoning Application.

- 11.** OWASA's Long-Range Water Supply Plan Update. [\[22-0350\]](#)

PRESENTER: Ruth Rouse, OWASA Planning and Development Manager

RECOMMENDATION: That the Council receive the update on OWASA's Long Range Water Supply Plan.

- 12.** Open the Legislative Hearing: Conditional Zoning Application for 101 E. Rosemary Street. [\[22-0351\]](#)

PRESENTER: Judy Johnson, Assistant Planning Director

- a. Without objection, the preliminary report and any other materials submitted at the hearing for consideration by the Council will be entered into the record
- b. Introduction and preliminary recommendation
- c. Presentation by the applicant
- d. Recommendation of the Planning Commission
- e. Recommendation of the other boards and commissions
- f. Comments from the public
- g. Comments and questions from the Mayor and Town Council
- h. Referral to the Manager and Attorney
- i. Consider enacting the ordinance at approve the Conditional Zoning application on May 18, 2022

RECOMMENDATION: That the Council open the legislative hearing

and receive comments on the proposed Conditional Rezoning. That the Council then make a motion to schedule approving the proposed Conditional Rezoning application for May 18, 2022.

### CONCEPT PLAN REVIEW

*Concept Plans: Presentations for Concept Plans will be limited to 15 minutes.*

*Concept Plan review affords Council members the opportunity to provide individual reactions to the overall concept of the development which is being contemplated for future application. Nothing stated by individual Council members this evening can be construed as an official position or commitment on the part of a Council member with respect to the position they may take when and if a formal application for development is subsequently submitted and comes before the Council for formal consideration.*

*As a courtesy to others, people speaking on an agenda item are normally limited to three minutes. Persons who are organizing a group presentation and who wish to speak beyond the three minute limit are requested to make prior arrangements through the Mayor's Office by calling 968-2714.*

- 13.** Concept Plan Review: 828 MLK, 828 Martin Luther King Jr. Blvd.

[\[22-0352\]](#)

PRESENTER: Elysa Smigielski, Senior Planner

- a. Review of process
- b. Presentation by the applicant
- c. Comments from the Advisory Boards
- d. Comments from the Town's Urban Designer
- e. Comments from the public
- f. Comments and questions from the Mayor and Town Council
- g. Motion to adopt a resolution transmitting Council comments to the applicant.

RECOMMENDATION: That the Council adopt the resolution transmitting comments to the applicant.

### REQUEST FOR CLOSED SESSION TO DISCUSS ECONOMIC DEVELOPMENT, PROPERTY ACQUISITION, PERSONNEL, AND/OR LITIGATION MATTERS



# TOWN OF CHAPEL HILL

Town Hall  
405 Martin Luther King Jr.  
Boulevard  
Chapel Hill, NC 27514

## Item Overview

**Item #:** 1., **File #:** [22-0341], **Version:** 1

**Meeting Date:** 4/27/2022

### **Moriah Ridge, LLC. Request to Amend Consent Judgement to Permit the City of Durham to Annex a Property off of Mt. Moriah Road.**

#### **Staff:**

Sabrina M. Oliver, Director and Town Clerk  
Amy T. Harvey, Deputy Town Clerk

#### **Department:**

Communications and Public Affairs

**Overview:** Petitions and other similar requests submitted by the public, whether written or oral, are heard at the beginning of each regular meeting. Except in the case of urgency and unanimous vote of the Council members present, petitions will not be acted upon at the time presented. After receiving a petition, the Council shall, by simple motion, dispose of it as follows: consideration at a future regular Council meeting; referral to another board or committee for study and report; referral to the Town Manager for investigation and report; receive for information. See the [Status of Petitions to Council <https://www.townofchapelhill.org/government/mayor-and-council/how-to-submit-a-petition/petition-status>](https://www.townofchapelhill.org/government/mayor-and-council/how-to-submit-a-petition/petition-status) webpage to track the petition. Receiving or referring of a petition does not constitute approval, agreement, or consent.



#### **Recommendation(s):**

That the Council consider the petition.



#### **Attachments:**

- Moriah Ridge, LLC. Request



William J. Brian, Jr.  
700 W Main St  
Durham, NC 27701

919-590-0372  
bbrian@morningstarlawgroup.com  
www.morningstarlawgroup.com

April 12, 2022

**BY E-MAIL**

The Honorable Pam Hemminger  
Mayor, Town of Chapel Hill  
Town Hall, Third Floor  
405 Martin Luther King Jr. Blvd  
Chapel Hill, NC 27514-5705

Re: *Petition to Amend Consent Judgment to Permit Annexation of Mr. Moriah Road  
Development by the City of Durham*

Dear Mayor Hemminger:

We represent Moriah Ridge, LLC. Our client is interested in annexing property located off of Mt. Moriah Road which is located in Orange County into the City of Durham so that it can be developed for a mix of townhomes, single-family housing and apartments ("Mt. Moriah Road Development"). An exhibit showing the property in question is enclosed. The property technically is within the extraterritorial jurisdiction ("ETJ") of the Town of Chapel Hill. The property is not environmentally significant in any way, and OWASA has confirmed that it cannot serve the property with water or sewer because of its location on the north side of I-40. A letter from OWASA to this effect is enclosed. Therefore, the property cannot be annexed by Chapel Hill because it cannot be served by Chapel Hill with water and sewer. On the other hand, the property is very well situated to be served by existing Durham water and sewer, which is located just across the street.

We asked the City of Durham if it would be willing to extend services outside its city limits to this property, so that it could be annexed by Chapel Hill, but Durham has shown no interest in doing so. For your information, in order for Durham to extend services to this property, it would have to amend its own ordinances which prohibit it from extending water and sewer to property outside its limits, except under certain limited circumstances, none of which exist here. It also would have to revamp its utility extension policies. Therefore, the only viable option for getting water and sewer to this property of which we are aware is annexing it into the City of Durham.

Even if this project is located in the City of Durham, its proximity to Chapel Hill will be an asset to the community. This project promises to deliver a substantial amount of "missing

Honorable Pam Hemminger

April 12, 2022

Page 2

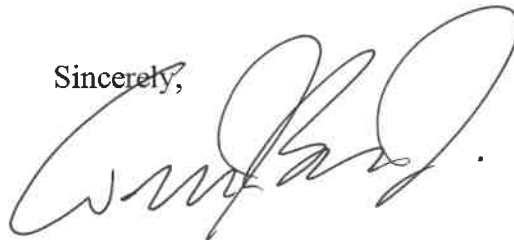
middle housing” in an area near a major transit hub, and as such fits into the Town of Chapel Hill’s stated goals for residential development. No doubt many of the residents of this project will work in Chapel Hill, and therefore this project will be an economic asset to Chapel Hill, without Chapel Hill having to be responsible for providing services to the residents of the project.

As a practical matter, this annexation only will be accomplished if both cities agree to it. There is a Consent Judgment between Chapel Hill and Durham that was entered in 1986 and later modified in 1994 in which both cities agreed that there would be no further annexation by either city into their respective counties except by mutual agreement. A copy of the Consent Judgment is enclosed. We believe the mutual agreement to make the Mt. Moriah Road Development possible should come in the form of an amendment to the existing Consent Judgment. This amended Consent Judgment will establish a new annexation boundary, but preserve the underlying agreement that neither city will annex into the other’s county in the future without mutual agreement.

Our understanding from speaking with staff and elected officials in the City of Durham is that Durham is willing to amend the Consent Judgment if Chapel Hill is willing to do the same. However, before proceeding, Durham wants Chapel Hill to clearly state its willingness to permit it to annex this property. Therefore, we hereby petition that an amendment to the Consent Judgment be put on the Chapel Hill Town Council’s agenda as soon as possible.

Please let us know if you have any questions or need any additional information. Otherwise, please let us know when this matter will go before the Chapel Hill Town Council. We look forward to the opportunity to speak to the Council in support of this petition. We will assist in this process in any way that we can and very much appreciate your assistance with this matter. We look forward to hearing from you soon.

Sincerely,

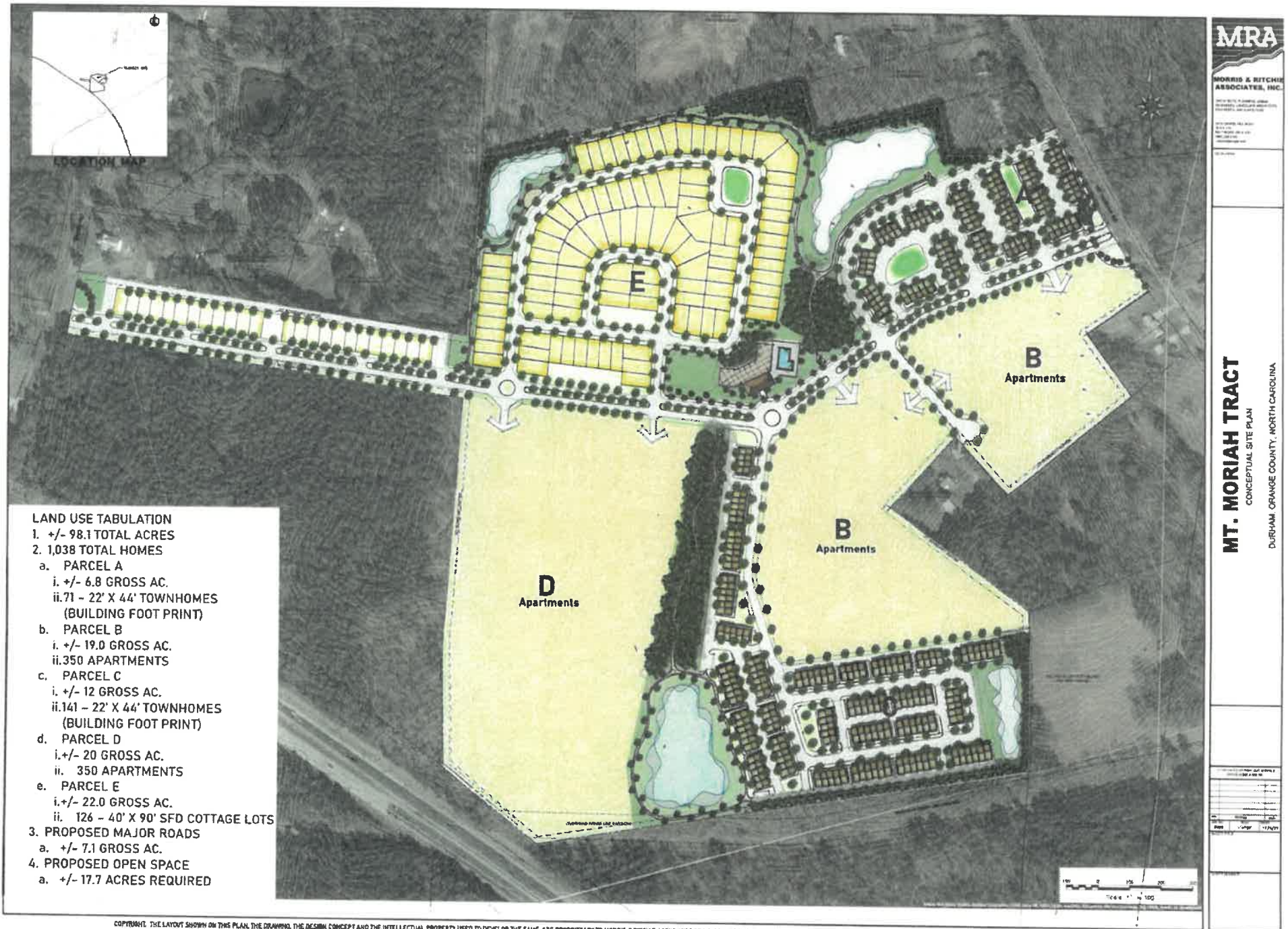
A handwritten signature in black ink, appearing to read 'William J. Brian, Jr.', with a large, stylized initial 'W' and 'B'.

William J. Brian, Jr.

Enclosures

cc: The Honorable Members of the Chapel Hill Town Council  
Ann Anderson, Esq., Town Attorney  
Ms. Colleen R. Willger, Planning Director  
Ms. Judy Johnson, Assistant Planning Direct  
(all with enclosures)







## Orange Water and Sewer Authority

OWASA is Carrboro-Chapel Hill's not-for-profit public service agency delivering high quality water, wastewater, and reclaimed water services.

March 25, 2022

Mr. Daniel Jewell  
CJTpa  
111 W. Main St  
Durham, NC 27701

RE: Properties associated with the Town of Chapel Hill ETJ Area North and East of Interstate 40

Dear Mr. Jewell:

Based on your communications with our Engineering Staff about potential water and sewer service to this Town of Chapel Hill Extra Territorial Jurisdiction area in Orange County generally bounded by interstate 40, Erwin Road and Mt. Moriah Road as shown on the attached Figure 1, Orange Water and Sewer Authority has come to the following conclusions:

- These properties are not currently served by OWASA water or sewer.
- These Properties are not currently within the Water and Sewer Management Planning and Boundary Agreement (WSMPBA).

It is OWASA's understanding based on information provided by you that the City of Durham has existing water and sanitary sewer in proximity to these properties.

Orange Water and Sewer Authority would not object to this area being served by the City of Durham.

Sincerely

Todd Taylor, P.E.  
Executive Director

c: Jessica Godreau, Engineering Manager - Development Services



[illegible]

Figure 2 – WSMPBA 2017

NORTH CAROLINA  
DURHAM COUNTY

FILED

IN THE GENERAL COURT OF JUSTICE  
SUPERIOR COURT DIVISION

1984 AUG 19 AM 9 36

85 CVS 03108

TOWN OF CHAPEL HILL

Plaintiff,

v.

CITY OF DURHAM

Durham.

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**MODIFICATION TO CONSENT JUDGMENT**

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This cause coming on to be heard and being heard before the undersigned Judge Presiding and it appearing to the Court that the parties wish to modify the consent judgment entered in this matter on November 6, 1986 (the "Judgment") by making certain modifications to the line defining the parties' areas of potential future annexations as set out in Exhibit D to the Judgment while ratifying and confirming the Judgment in all respects except as specifically modified by this order and it further appearing to the Court that the Chapel Hill Town Council and the Durham City Council have adopted resolutions authorizing the amendment to the Judgment copies of which are attached hereto as Exhibits "A" and "B";

IT IS THEREFORE ORDERED, ADJUDGED AND DECREED, by consent of the parties, as follows:

1. That the line defined in Exhibit D to the December 6, 1986 consent judgment is modified to be as set out in Exhibit C attached hereto and incorporated herein by reference.
2. That absent an agreement by the parties, the Town of Chapel Hill will not extend its corporate limits, now generally located west and south of the line described in Exhibit C, to the

east and north of the line and the City of Durham will not extend its corporate limits, now located generally east and north of the line, to the west and south of the line.

3. Without prior agreement of the parties, neither party will

(a) accept or process any petition for annexation of any land on the opposite side of the line defined under Exhibit C;

(b) initiate or process any unilateral annexation of any land on the opposite side of the line defined in Exhibit C;

(c) take any other steps to annex any land on the opposite side of the line defined in Exhibit C.

4. Except as specifically modified by this order, the parties ratify and confirm the consent order of November 6, 1986 in its entirety.

*Dr. Brown*  
Judge Presiding

Consented To:

*Ralph D. Karpinos*  
Attorney for Town of Chapel Hill

*Anna Hoewershal*  
Acting Town Manager  
Town of Chapel Hill

*Karen A. Sindelar*  
Asst. Attorney for City of Durham

*Cecil B. Brown, Jr.*  
City Manager, City of Durham

I certify the foregoing to be a true and correct copy of the original as the same appears on file in this office.

19 day of August 1994

Clerk Superior Court  
Durham County, N.C.

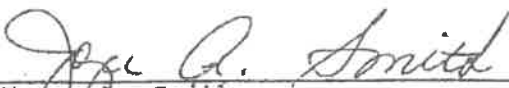
*Shelia Gentry*  
Assistant Deputy Clerk

Exhibit A to Modification to  
Consent Judgement

I, Joyce A. Smith, Deputy Town Clerk, of the Town of Chapel Hill, North Carolina, hereby certify that the attached is a true and correct copy of Resolution 94-7-5/R-17, adopted by the Chapel Hill Town Council on July 5, 1994.

This the 18th day of July, 1994



  
Joyce A. Smith  
Deputy Town Clerk



A RESOLUTION AUTHORIZING AMENDMENT TO THE CONSENT ORDER *TOWN OF CHAPEL HILL V. CITY OF DURHAM*, 85 CVS 3108 AND APPROVING A MODIFICATION OF THE LINE REPRESENTING THE LIMITS FOR FUTURE ANNEXATIONS BY THE MUNICIPALITIES OF CHAPEL HILL AND DURHAM (94-7-5/R-17)

WHEREAS, the City of Durham and the Town of Chapel Hill entered into a consent order in *Town of Chapel Hill v. City of Durham* (85 CVS 3108, Durham County) establishing a line across which neither municipality would:

- (a) accept or process any petition or annexation of land;
- (b) initiate or process any unilateral annexation of any land;
- (c) take any other steps to annex any land; and

WHEREAS, the City of Durham and the Town of Chapel Hill, through their respective governing bodies, believe it is proper and in the best interest of the municipalities to make certain adjustments to the line established in the consent order such that Orange County Tax Map Lot 7.15..17B would be subject to annexation by the City of Durham and Durham County Tax Map Lots 479A-1-14 through 16, and a portion of 17; 479A-2-1 through 4; 479A-4-18 and 19, and a portion of 17; 479A-5-, a portion of 2; and the intervening right-of-way of Nottingham Drive and Kinsale Drive, would be subject to annexation by the Town of Chapel Hill;

NOW, THEREFORE, BE IT RESOLVED by the Council of the Town of Chapel Hill that it does hereby authorize the modification of the consent order in *Town of Chapel Hill v. City of Durham*, (85 CVS 3108, Durham County) such that the line defining the long range annexation boundary between the City of Durham and the Town of Chapel Hill would be adjusted such that Orange County Tax Map Lot 7.15..17B would be subject to annexation by the City of Durham and Durham County Tax Map Lots 479A-1-14 through 16, and a portion of 17; 479A-2-1 through 4; 479A-4-18 and 19, and a portion of 17; 479A-5-, a portion of 2; and the intervening right-of-way of Nottingham Drive and Kinsale Drive, would be subject to annexation by the Town of Chapel Hill;

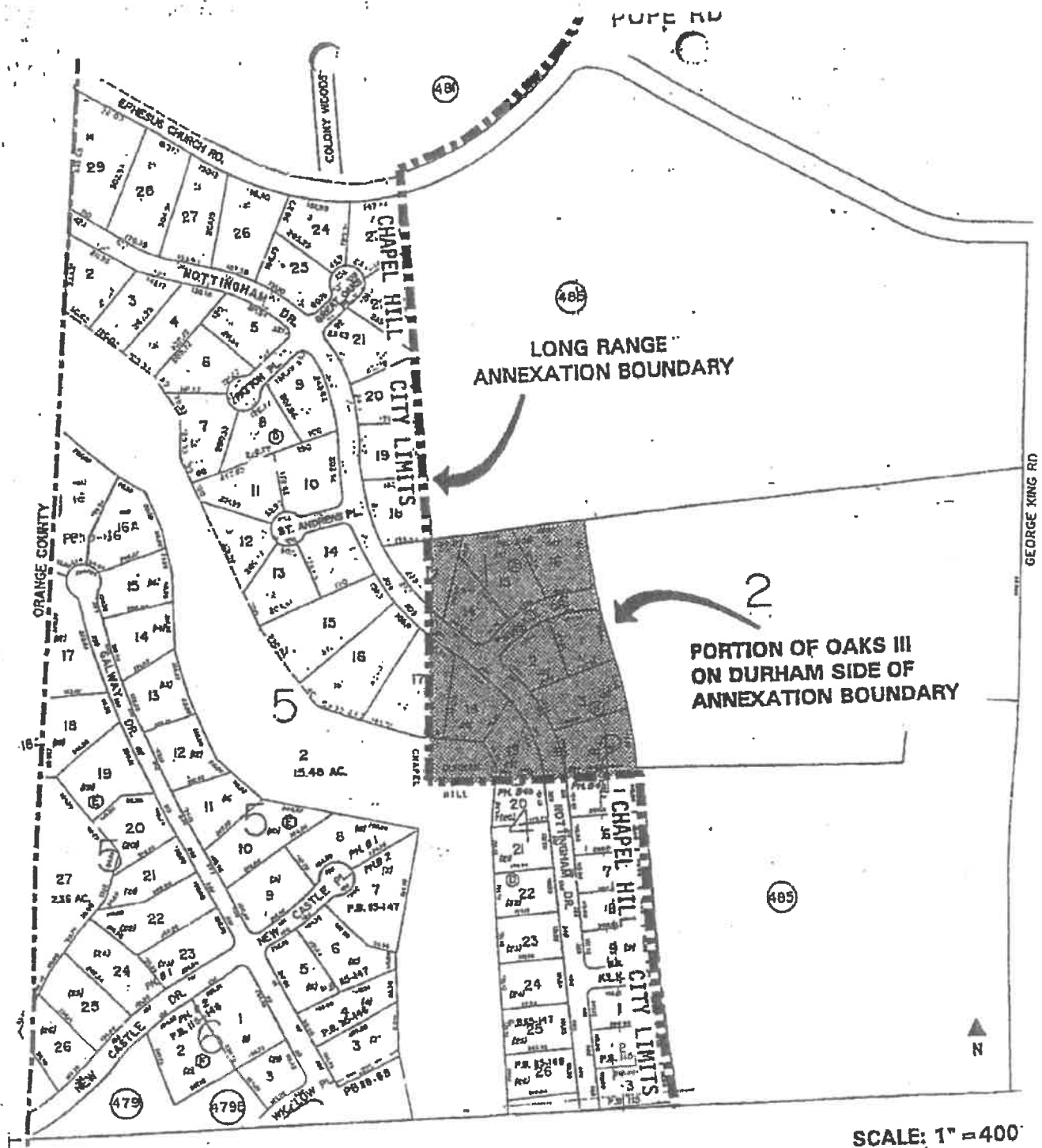
BE IT FURTHER RESOLVED that it is the clear and express intention of the Town of Chapel Hill by adopting this resolution and authorizing the modification of the consent judgment that both the Town of Chapel Hill and the City of Durham will remain bound and obligated by the terms of the consent judgment entered December 6, 1986, except as specifically modified pursuant to this resolution;

BE IT FURTHER RESOLVED that the Council authorizes and directs the Town Manager and Town Attorney to sign a modification of the consent judgment to carry out the terms of this resolution; and

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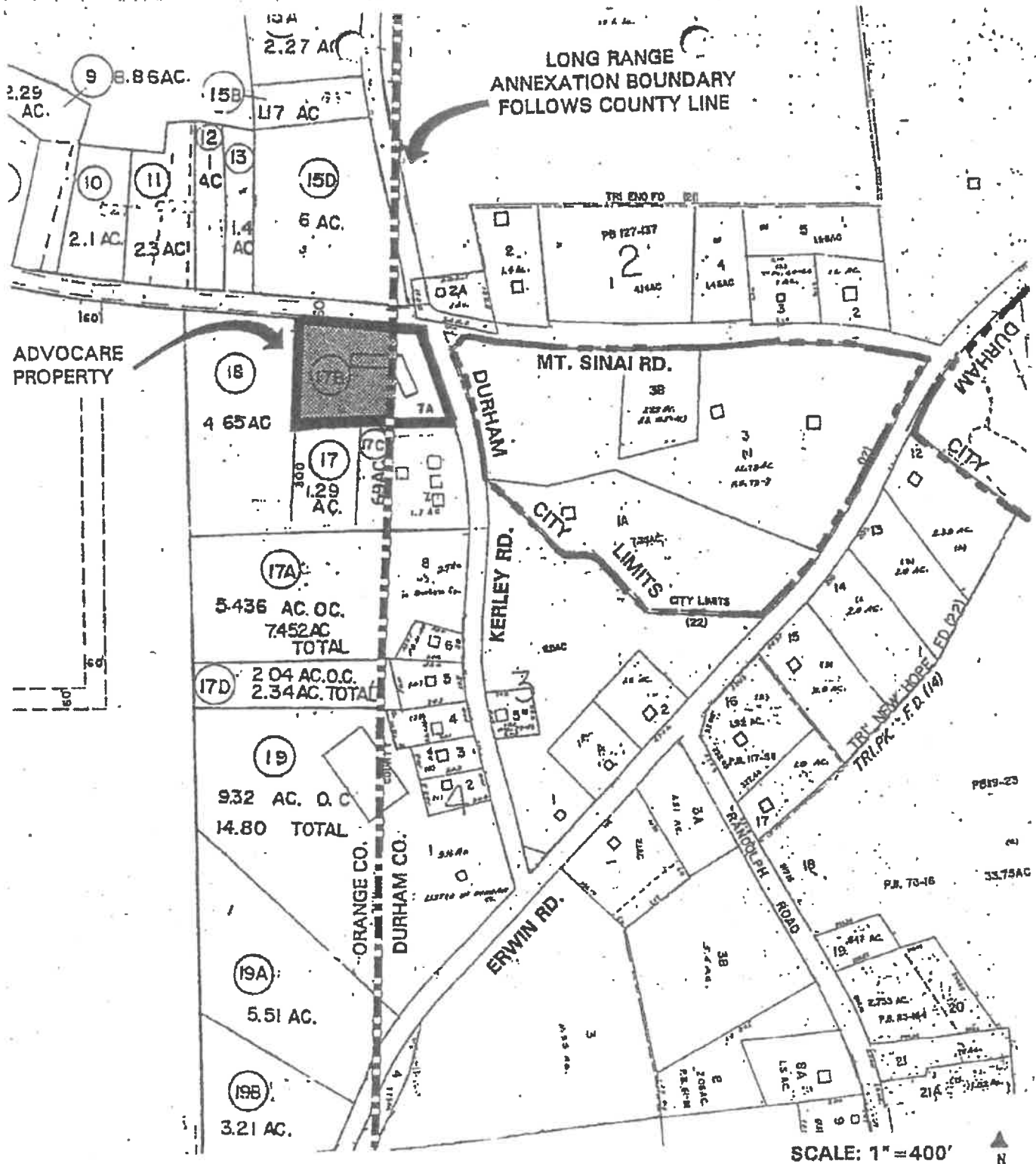
**BE IT FURTHER RESOLVED** that the adoption of this resolution is contingent upon the adoption of a substantially identical resolution by the Council of the City of Durham.

This is the 5th day of July, 1994.



### ATTACHMENT 1

Map of the Portion of the Oaks III Subdivision on Durham's Side of the 1986 Consent Judgement Annexation Boundary Line



## ATTACHMENT 2

Map of the Portion of the AdvoCare Property Located in the Rural Buffer on Chapel Hill's Side of the 1986 Consent Judgment Annexation Boundary Line

DURHAM

1 8 6 9  
CITY OF MEDICINECity of Durham  
North CarolinaCity Clerk  
Office of Records Management  
101 City Hall Plaza  
Durham, NC 27701

(919) 560-4166

SUBJECT: ANNEXATION AGREEMENT AMENDMENT BETWEEN DURHAM AND CHAPEL HILL - ADVOCARE, INC.

MOTION by Council Member Lloyd seconded by Council Member Griffin to adopt a "Resolution Authorizing Amendment to the Consent Order Town of Chapel Hill V. City of Durham, 85 CVS 3108 and Approving a Modification of the Line Representing the Limits for Future Annexations by the Municipalities of Chapel Hill and Durham" as amended was approved at 5:46 p.m. by the following vote: Ayes: Mayor Kerckhoff and Council Members Clement, Engelhard, Griffin, Hyman, Larson, Lloyd, London, McKissick, Ogburn, Robinson and Seibel. Noes: None. Absent At Time of Vote: Council Member Wright.

NORTH CAROLINA  
DURHAM COUNTY

I, D. Ann Gray, duly appointed Deputy City Clerk of the City of Durham, North Carolina, do hereby certify that the above action was taken by the Durham City Council at a special meeting held on June 30, 1994, which is on file [Resolution #7958] in the Office of the City Clerk at City Hall.

WITNESS my hand and the corporate seal of the City of Durham, North Carolina, this the 27th day of July 1994.

*D. Ann Gray*

D. Ann Gray  
Deputy City Clerk



An Equal Opportunity  
Affirmative Action Employer

EXHIBIT B PAGE 2  
RESOLUTION #7958

A RESOLUTION AUTHORIZING AMENDMENT TO THE CONSENT ORDER TOWN OF CHAPEL HILL V. CITY OF DURHAM, 85 CVS 3108 AND APPROVING A MODIFICATION OF THE LINE REPRESENTING THE LIMITS FOR FUTURE ANNEXATIONS BY THE MUNICIPALITIES OF CHAPEL HILL AND DURHAM

WHEREAS, the City of Durham and the Town of Chapel Hill entered into a consent order in *Town of Chapel Hill v. City of Durham* (85 CVS 3108, Durham County) establishing a line across which neither municipality would:

- (a) accept or process any petition or annexation of land;
- (b) initiate or process any unilateral annexation of any land;
- (c) take any other steps to annex land; and

WHEREAS, the City of Durham and the Town of Chapel Hill, through their respective governing bodies, believe it is proper and in the best interest of the municipalities to make certain adjustments to the line established in the consent order such that Orange County Tax Map Lot 7.15.17B would be subject to annexation by the City of Durham and Durham County Tax Map Lots 479A-1-14 through 16, and a portion of 17; 479A-2-1 through 4; 479A-4-18 and 19 and a portion of 17; 479A-5, a portion of 2; and the intervening right-of-way of Nottingham Drive and Kinsale Drive, would be subject to annexation by the Town of Chapel Hill;

NOW, THEREFORE, BE IT RESOLVED by the Durham City Council that it does hereby authorize the modification of the consent order in *Town of Chapel Hill v. City of Durham*, (85 CVS 3108, Durham County) such that the line defining the long range annexation boundary between the City of Durham and the Town of Chapel Hill shall be as described in the metes and bounds description, attached hereto as Exhibit C.

BE IT FURTHER RESOLVED that it is the clear and express intention of the City of Durham by adopting this resolution and authorizing the modification of the consent judgment that both the Town of Chapel Hill and the City of Durham will remain bound and obligated by the terms of the consent judgment entered December 6, 1986, except as specifically modified pursuant to this resolution;

APPROVED BY  
CITY COUNCIL

JUN 30 1994

*D. Ann Gray*  
DEPUTY CITY CLERK

[Revised Portion]  
ATTACHMENT #1



EXHIBIT E PAGE 3

BE IT FURTHER RESOLVED that the Council authorizes and directs the City Manager and City Attorney to sign a modification of the consent judgment to carry out the terms of this resolution.

BE IT FURTHER RESOLVED that the adoption of this resolution is contingent upon the adoption of a substantially identical resolution by the Council of the Town of Chapel Hill.

This the 30th day of June, 1994.

Exhibit C To Amendment  
To Consent Order

BEGINNING at a point on the Orange-Durham County line where the line intersects the southern right of way of Cornwallis Road; running thence along the Orange-Durham County line in a southerly direction to the intersection of the Orange-Durham County line and the southern line of Mt. Sinai Church Road, a point in the northern line of the property of AdvocaCare, Inc. as described in Deed Book 1006, Page 160, Orange County Registry, thence along the northern line of the property of AdvocaCare, Inc. to its northwestern corner; thence along the western line of said property, South 12 degs. 15' West 336 feet to AdvocaCare, Inc.'s southwest corner, thence along AdvocaCare's southern line to its intersection with the Orange-Durham County line; thence continuing in a generally southerly direction to the intersection of the Orange-Durham County line in the southern right of way of I-40; thence along the southern right of way of I-40 in a southeasterly direction approximately 2,800 feet to the intersection of the southern right of way of I-40 and the western right-of-way of Pope Road; thence along the western right of way of Pope Road and the northern right of way of Ephesus Church Road in a southerly direction approximately 6,000 feet to a point in the northern right-of-way of Ephesus Church Road, said point being a projection of the eastern property line of tract 2 of the DuBose property as shown on the plat "Survey of David St. Pierre DuBose, Jr." dated February 12, 1986, Durham County Plat Book 110, Page 159; thence across Ephesus Church Road south 1 deg. 8' 10" West approximately 60 feet to a point in the southern right of way of Ephesus Church Road, the northeast corner of the said DuBose tract; thence along said property line South 1 deg. 8' 10" West 1,028.19 feet to a concrete monument (N.C.G.S. 792.453.51; 1,999,494.93) located in the northern line of Lot 13, Block A, Oaks III Subdivision according to the plat recorded at Plat Book 117, Page 116, Durham County Registry; along the northern lines of Lot 13, Block A Oaks III and Lots 15 and 16, Block A, Oaks III according to Plat Book 115, Page 147, Durham County Registry North 88 degs. 3' 31" East 457.4 feet to the northeast corner of Lot 16, Block B, Oaks III; thence running with the eastern line of Lot 16, Block B Oaks III along the arc of a curve having a chord bearing of South 5 degs. 59' 28" East 306.28 feet to a point in the eastern line of Lot 1, Block B, Oaks III according to the Plat Book 115, Page 147, Durham County Registry; thence along the eastern line of Lot 1, South 10 degs. 1' 45" East 103.77 feet to the northeastern corner of Lot 3, Block B, Oaks III Subdivision; thence along the arc of a curve having a chord bearing of South 5 degs. 22' 14" East a distance of 291.21 feet to a point in the eastern line of Lot 4, Oaks III Subdivision; thence South 00 degs. 42' 43" East 46.48 feet to a point, the southeastern corner of Lot 4, Block B, Oaks III, the northwest corner of the Specia Moore, Sr. lot; thence along DuBose's eastern property line South 00 degs. 46' 54" East 313.74 feet, South 00 degs. 34' 56" East 520.39 feet, and South 00 degs. 38' 45" East 345.34 feet to an iron pin, the southwest corner of the Elvie King

lot; thence along the western property line of a 16.68 acre tract as shown on Durham County Plat Book 28, Page 2 South 02 degs. 53' West 990.8 feet to the southwest corner of said 16.68 acre tract; thence continuing along the western property line of a 29.61 acre tract, Deed Book 127, Page 174, in a southerly direction approximately 1750 feet to a point on the B. Everett Jordan Dam and Lake Project, as shown on the U.S. Army Corps of Engineers Project Map, Segment "19", said point being located between stations 760 and 761; thence along the B. Everett Jordan Project western property line South 83 degs. 36' 04.9" West approximately 550 feet to a monument, station 760; thence South 30 degs. 01' 55" West 541.81 feet to a monument, station 733; thence continuing from station 733 to station 725 the following bearings and distances: South 48 degs. 59' 30.7" East 688.205 feet, South 42 degs. 04' 46.9" West 571.726 feet, South 14 degs. 03' 02.1" West 754.229 feet, South 20 degs. 41' 18.4" West 719.949 feet, South 43 degs. 14' 14.7" West 638.742 feet, South 70 degs. 55' 24.2" East 1,124.828 feet, South 47 degs. 23' 20.1" East 385.243 feet, South 87 degs. 51' 49.7" East 464.031 feet; thence continuing with said property line in a southwesterly direction to the northern right-of-way of N.C. 54; thence along the northern right-of-way line of N.C. 54 in a westerly direction to a point on said right-of-way, said point being a projection of the eastern property line of Sherwood Forest Subdivision as shown on Durham County Plat Book 30, Page 49; thence across N.C. 54 to a point on the southern right-of-way, the northeast corner of said subdivision; thence along the eastern property line of said subdivision South 02 degs. 45' West approximately 579 feet; thence along said line South 06 degs. 18' West approximately 788 feet to the southeast corner of said subdivision; thence along the southern property line of said subdivision South 78 degs. 43' West approximately 389 feet to the southwest corner of Sherwood Forest Subdivision; thence continuing in a westerly direction along the southern property line of Lots 28, 12, 23 and 24, Block 5, Durham County Tax Map 491 approximately 1650 feet to a point on the eastern right-of-way of Barbee Chapel Road; thence along the eastern right-of-way of Barbee Chapel Road in a southeasterly direction approximately 2100 feet to a point on the northeastern right-of-way, said point being a projection of eastern property line of the University of North Carolina Mason Farm property; thence across Barbee Chapel Road South 01 degs. 55" East approximately 70 feet to the southwestern right-of-way of said road, the northeast corner of the University of North Carolina Mason Farm property; thence along said eastern property line South 01 degs. 55' East 2036.72 feet to the southeast corner of said property; thence along the southern property line of said property South 88 degs. 20' West approximately 790 feet to a point where the Mason Farm property line intersects the property line of the B. Everett Jordan Dam and Lake Project, as shown on the U.S. Army Corps of Engineers Project Map, segment "18"; thence along said property line South 18 degs. 13' 51.9" East approximately 35 feet to station 593; thence continuing from station 593 to station 612 the following bearings and distances: South 25 degs. 13' 20.5" West 628.157 feet, South 25 degs. 37' 16.4" East 861.188 feet, South 24 degs. 05' 45.5" West 1760.320 feet, South 08 degs. 51'

38.4" West 1094.710 feet, South 85 degs. 59' 59.6" East 474.352 feet, South 61 degs. 23' 46.3" West 993.702 feet, South 17 degs. 13' 41.0" West 377.241 feet, South 73 degs. 55' 29.3" East 264.451 feet, South 01 degs. 09' 49.3" East 688.853 feet, South 47 degs. 08' 23.7" West 410.232 feet, South 70 degs. 00' 43.3" East 398.486 feet, North 46 degs. 10' 16.2" East 423.521 feet, South 02 degs. 16' 57.8" West 1101.648 feet, South 56 degs. 36' 55.4" East 652.068 feet, South 00 degs. 37' 35.9" West 233.201 feet, North 69 degs. 12' 24.0" East 1315.976 feet, North 48 degs. 27' 28.7" East 673.841 feet, South 03 degs. 17' 26.7" East 409.549 feet, South 38 degs. 41' 45.9" West 1041.911 feet; thence continuing with said property line South 16 degs. 35' 17.7" East approximately 600 feet to a point where the B. Everett Jordan Lake property line intersects the Durham-Chatham County line, said point being located approximately 4900 feet east of the southeast corner of Orange County.

**DURHAM**
**1 8 6 9**  
 CITY OF MEDICINE

**City of Durham**  
**North Carolina**

 City Clerk  
 Office of Records Management  
 101 City Hall Plaza  
 Durham, NC 27701

(919) 560-4166

**SUBJECT: TECHNICAL AMENDMENTS TO LEGAL DESCRIPTION IN RESOLUTION CONCERNING CHAPEL HILL/DURHAM CONSENT JUDGMENT**

MOTION by Council Member Lloyd seconded by Council Member Griffin to adopt "A Resolution Authorizing Technical Amendments in the Legal Description of Resolution #7958 Concerning the Consent Order in Town of Chapel Hill V. City of Durham, 85 CVS 3108" was approved at 7:43 p.m. by the following vote: Ayes: Mayor Kerckhoff and Council Members Clement, Engelhard, Griffin, Hyman, Larson, Lloyd, London, Ogburn, Seibel and Wright. Noes: None. Absent: Council Members McKissick and Robinson.

**NORTH CAROLINA**  
**DURHAM COUNTY**

I, D. Ann Gray, duly appointed Deputy City Clerk of the City of Durham, North Carolina, do hereby certify that the above action was taken by the Durham City Council at their regular meeting held on Monday, August 15, 1994, which is on file [Resolution #7979] in the Office of the City Clerk at City Hall.

WITNESS my hand and the corporate seal of the City of Durham, North Carolina, this the 18th day of August, 1994.

D. Ann Gray  
 Deputy City Clerk



An Equal Opportunity  
 Affirmative Action Employer

6-12

EXHIBIT B PAGE 8

RESOLUTION #7979

A RESOLUTION AUTHORIZING TECHNICAL AMENDMENTS IN THE LEGAL DESCRIPTION OF RESOLUTION #7958 CONCERNING THE CONSENT ORDER IN TOWN OF CHAPEL HILL V. CITY OF DURHAM, 85 CVS 8108

BE IT RESOLVED that the Durham City Council hereby approves the attached minor technical changes to the metes and bounds description, Attachment C, in Resolution #7958 concerning the consent order in *Town of Chapel Hill v. City of Durham*.

BE IT FURTHER RESOLVED that the attached legal description entitled "8/15/94 Technical Amendments in Legal Description to Resolution #7958" supercedes and is substituted for the legal description contained in Exhibit C to Resolution #7958.

This the 15th day of August, 1994.

APPROVED BY  
CITY COUNCIL

AUG 15 1994

*Margaret M. Bowles*  
CITY CLERK



8/15/94 TECHNICAL AMENDMENTS IN LEGAL DESCRIPTION TO RESOLUTION #7958  
Exhibit "C" to Amendment  
to Consent Order

BEGINNING at a point on the Orange-Durham County line where the line intersects the southern right of way of Cornwallis Road; running thence along the Orange-Durham County line in a southerly direction to the intersection of the Orange-Durham County line and the southern line of Mt. Sinai Church Road, a point in the northern line of the property of Advocare, Inc. as described in Deed Book 1006, Page 160, Orange County Registry, thence along the northern line of the property of AdvoCare, Inc. to its northwestern corner; thence along the western line of said property, South 12 degs. 15' West 336 feet to AdvoCare, Inc.'s southwest corner, thence along AdvoCare's southern line to its intersection with the Orange-Durham County line; thence continuing in a generally southerly direction to the intersection of the Orange-Durham County line in the southern right of way of I-40; thence along the southern right of way of I-40 in a southeasterly direction approximately 2,800 feet to the intersection of the southern right of way of I-40 and the western right-of-way of Pope Road; thence along the western right of way of Pope Road and the northern right of way of Ephesus Church Road in a southerly direction approximately 6,000 feet to a point in the northern right-of-way of Ephesus Church Road, said point being a projection of the eastern property line of tract 2 of the DuBose property as shown on the plat "Survey of David St. Pierre DuBose, Jr." dated February 12, 1986, Durham County Plat Book 110, Page 159; thence across Ephesus Church Road south 1 deg. 8' 10" West approximately 60 feet to a point in the southern right of way of Ephesus Church Road, the northeast corner of the said DuBose tract; thence along said property line South 1 deg. 8' 10" West 1,028.19 feet to a concrete monument (N.C.G.S. 792.453.51; 1,999,494.93) located in the northern line of Lot 13, Block A, Oaks III Subdivision according to the plat recorded at Plat Book 117, Page 116, Durham County Registry; along the northern lines of Lot 13, Block A Oaks III and Lots 15 and 16, Block A, Oaks III according to Plat Book 115, Page 147, Durham County Registry North 88 degs. 3' 31" East 457.4 feet to the northeast corner of Lot 16, Block A, Oaks III; thence running with the eastern line of Lot 16, Block A, Oaks III along the arc of a curve having a chord bearing and distance of South 5 degs. 59' 28" East 306.02 feet and an arc distance of 306.25 feet to a point in the eastern line of Lot 1, Block B, Oaks III according to the Plat Book 115, Page 147, Durham County Registry; thence along the eastern line of Lot 1, South 10 degs. 1' 45" East 103.77 feet to the northeastern corner of Lot 3, Block B, Oaks III Subdivision; thence along the arc of a curve having a chord bearing and distance of South 5 degs. 22' 14" East 290.89 feet and an arc distance of 291.21 feet to a point in the eastern line of Lot 4, Oaks III Subdivision; thence South 00 degs. 42' 43" East 46.48 feet to a point, the southeastern corner of Lot 4, Block B, Oaks III, the northwest corner of the Specia Moore, Sr. lot; thence along DuBose's eastern property line South 00 degs. 46' 54" East 313.74 feet, South 00 degs. 34' 56" East 520.39 feet, and South 00 degs. 38' 45" East 345.34 feet to an iron pin, the southwest corner of the Elvie King lot; thence along the western property line of a 16.68 acre tract as shown on Durham County Plat Book 28, Page 2 South 02 degs. 53' West 990.8 feet to the southwest corner of said 16.68 acre tract; thence continuing along the western property line of a 29.61 acre tract, Deed Book 127, Page 174, in a southerly direction approximately 1750 feet to a point on the B. Everett Jordan Dam and Lake Project, as shown on the U.S. Army Corps of Engineers Project Map, Segment "19", said point being located between stations 760 and 761; thence along the B. Everett Jordan Project western

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Exhibit "C" to Amendment  
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*Original consent judgment*  
ATTACHMENT 4

NORTH CAROLINA

DURHAM COUNTY

TOWN OF CHAPEL HILL,

PLAINTIFFS

v.

CITY OF DURHAM,

DEFENDANT

FILED

1986 NOV -6 PM

DURHAM

IN THE GENERAL COURT OF JUSTICE

SUPERIOR COURT DIVISION

FILE NO. 85 CVS 03108

CONSENT JUDGMENT

This cause being heard before the undersigned Presiding Judge of Civil Superior Court, Durham County, who, having determined that the Court has jurisdiction over the parties and the subject matter of this civil action, and upon representation of Counsel for Plaintiff and Counsel for Defendant that all matters in controversy have been settled and that the Parties consent to the entry of this Judgment, finds as follows:

1.

That on March 18, 1985, the Durham City Council adopted a resolution identifying approximately 14 square miles as under consideration for annexation by the City of Durham.

2.

That on April 1, 1985, the Council of the Town of Chapel Hill adopted a resolution identifying some of the same areas identified by the Durham City Council on March 18, 1985, plus additional areas not identified by the Durham City Council as under consideration for annexation by the Town of Chapel Hill.

3.

That after April 1, 1985, the City of Durham received an annexation petition from owners of some of the properties included in the April 1, 1985 resolution adopted by the Chapel Hill Town Council.

4.

That on November 4, 1985, the Durham City Council adopted a resolution of intent to annex territory that included some of the properties identified by both Durham and Chapel Hill in their respective resolutions of consideration of March 18, 1985 and April 1, 1985, such annexation to be effective at least one year after the adoption of the annexation ordinance by the Durham City Council.

5.

That on November 4, 1985, the Durham City Council also adopted a resolution setting a public hearing concerning the annexation of the area from which the petition from property owners had been received as described in paragraph (3) above; and thereafter the Durham City Council held such public hearing on November 18, 1985 and annexed this area in Ordinance #6820, effective November 30, 1985.

6.

That the Plaintiff and Defendant have each taken other procedural annexation steps which conflict with the immediate and long-range annexation goals of the other.

7.

That by a vote of 8-0 the Chapel Hill Town Council on July 14, 1986, adopted the resolution identified as Exhibit A attached hereto.

8.

That by a vote of 13-0 the Durham City Council on July 14, 1986, adopted the resolution identified as Exhibit B attached hereto.

IT IS THEREFORE ORDERED, ADJUDGED AND DECREED, by consent of the Parties, as follows:

1. That there is hereby established a line as is approximately represented on the map in Exhibit C attached hereto and incorporated herein and as is more particularly described in Exhibit D attached hereto and incorporated herein.

2. That absent agreement by the two parties the Town of Chapel Hill will not extend its corporate limits, now located generally west and south of this line, to the east and north of the line and the City of Durham will not extend its corporate limits, now located generally east and north of this line, to the west and south of the line.

3. That across this line, absent agreement by the two parties, neither municipality

(a) will accept or process any petition for annexation of any land; or

(b) will initiate or process any unilateral annexation of any land; or.

(c) will take any other steps to annex any land.

4. That any actions taken in the past or future by either municipality to annex territory consistent with this line will not be challenged or interfered with by the other municipality.

5. That as part of this agreement, this lawsuit, Town of Chapel Hill vs. City of Durham, #85 CVS 3108, is dismissed with prejudice to the Plaintiff without any final judicial determination as to the merits of the legal issues raised.

6. That the findings and intent of the governing boards of the Parties as expressed in Exhibits A and B, absent the map referenced therein, are incorporated by reference and by consent made a part of this Judgment.

This the 6 day of November, 1986.

Robert H. Holbrook  
Judge Presiding

APPROVED AND CONSENTED TO:

Plaintiff, Town of Chapel Hill

By Ralph D. Karpinos  
Attorney for Plaintiff  
Town Attorney

Daniel R. Jay  
Town Manager

Defendant, City of Durham

By W. S. Houton Jr.  
Attorney for Defendant  
City of Durham

W. W. L. L. L.  
City Manager

NORTH CAROLINA

FILED

IN THE GENERAL COURT OF JUSTICE  
SUPERIOR COURT DIVISION

DURHAM COUNTY

1986 NOV -6 PM 1:58

FILE NO. 85 CVS 03108

TOWN OF CHAPEL HILL, )  
PLAINTIFF )

v. )

CITY OF DURHAM, )  
DEFENDANT )

CONSENT JUDGMENT

This cause being heard before the undersigned Presiding Judge of Civil Superior Court, Durham County, who, having determined that the Court has jurisdiction over the parties and the subject matter of this civil action, and upon representation of Counsel for Plaintiff and Counsel for Defendant that all matters in controversy have been settled and that the Parties consent to the entry of this Judgment, finds as follows:

1.

That on March 18, 1985, the Durham City Council adopted a resolution identifying approximately 14 square miles as under consideration for annexation by the City of Durham.

2.

That on April 1, 1985, the Council of the Town of Chapel Hill adopted a resolution identifying some of the same areas identified by the Durham City Council on March 18, 1985, plus additional areas not identified by the Durham City Council as under consideration for annexation by the Town of Chapel Hill.

3.

That after April 1, 1985, the City of Durham received an annexation petition from owners of some of the properties included in the April 1, 1985 resolution adopted by the Chapel Hill Town Council.

4.

That on November 4, 1985, the Durham City Council adopted a resolution of intent to annex territory that included some of the properties identified by both Durham and Chapel Hill in their respective resolutions of consideration of March 18, 1985 and April 1, 1985, such annexation to be effective at least one year after the adoption of the annexation ordinance by the Durham City Council.



5.

That on November 4, 1985, the Durham City Council also adopted a resolution setting a public hearing concerning the annexation of the area from which the petition from property owners had been received as described in paragraph (3) above; and thereafter the Durham City Council held such public hearing on November 18, 1985 and annexed this area in Ordinance #6820, effective November 30, 1985.

6.

That the Plaintiff and Defendant have each taken other procedural annexation steps which conflict with the immediate and long-range annexation goals of the other.

7.

That by a vote of 8-0 the Chapel Hill Town Council on July 14, 1986, adopted the resolution identified as Exhibit A attached hereto.

8.

That by a vote of 13-0 the Durham City Council on July 14, 1986, adopted the resolution identified as Exhibit B attached hereto.

IT IS THEREFORE ORDERED, ADJUDGED AND DECREED, by consent of the Parties, as follows:

1. That there is hereby established a line as is approximately represented on the map in Exhibit C attached hereto and incorporated herein and as is more particularly described in Exhibit D attached hereto and incorporated herein.

2. That absent agreement by the two parties the Town of Chapel Hill will not extend its corporate limits, now located generally west and south of this line, to the east and north of the line and the City of Durham will not extend its corporate limits, now located generally east and north of this line, to the west and south of the line.

3. That across this line, absent agreement by the two parties, neither municipality

- (a) will accept or process any petition for annexation of any land; or
- (b) will initiate or process any unilateral annexation of any land; or
- (c) will take any other steps to annex any land.

4. That any actions taken in the past or future by either municipality to annex territory consistent with this line will not be challenged or interfered with by the other municipality.

5. That as part of this agreement, this lawsuit, Town of Chapel Hill vs. City of Durham, #85 CVS 3108, is dismissed with prejudice to the Plaintiff without any final judicial determination as to the merits of the legal issues raised.

6. That the findings and intent of the governing boards of the Parties as expressed in Exhibits A and B, absent the map referenced therein, are incorporated by reference and by consent made a part of this Judgment.

This the 6 day of November, 1986.

Robert H. Holbyood  
Judge Presiding

APPROVED AND CONSENTED TO:

Plaintiff, Town of Chapel Hill

By Ralph D. Karpinos  
Attorney for Plaintiff  
Town Attorney

David R. Taylor  
Town Manager

Defendant, City of Durham

By W.S. Shoultz  
Attorney for Defendant  
City of Durham

W. W. Russell  
City Manager

Exhibit A

RESOLUTION AUTHORIZING THE SETTLEMENT OF THE LAWSUIT TOWN OF CHAPEL HILL v. CITY OF DURHAM 85CVS3108 (DURHAM COUNTY) AND APPROVING A LINE REPRESENTING THE LIMITS FOR FUTURE ANNEXATIONS BY THE MUNICIPALITIES OF CHAPEL HILL AND DURHAM (86-7-14/R-23)

WHEREAS, there exists a dispute between the City of Durham and Town of Chapel Hill over annexation of areas between the two municipalities; and

WHEREAS, a lawsuit, Town of Chapel Hill v. City of Durham 85CVS3108 (Durham County), was initiated challenging the validity of certain annexation actions taken by the City of Durham; and

WHEREAS, the City of Durham and Town of Chapel Hill have each taken other procedural annexation steps which conflict with immediate annexation steps and long-range annexation goals of the other; and

WHEREAS, substantial unresolved legal questions remain in the pending lawsuit; and

WHEREAS, the City of Durham and Town of Chapel Hill, through their respective governing bodies, believe it is proper and in the best interests of the municipalities, their citizens, and the urbanizing areas between the two municipalities to resolve their dispute and differences in these areas by consent and agreement rather than continuing litigation and to proceed to resolve regional concerns in a spirit of cooperation; and

WHEREAS, resolution of this conflict by consent and agreement will allow owners and purchasers of land in urbanizing areas between the two municipalities to know where to look for future urban services; and

WHEREAS, resolution of this conflict will aid long-range planning efforts of the two municipalities as the unincorporated areas urbanize or otherwise become eligible for annexation to one or both municipalities;

NOW, THEREFORE, BE IT RESOLVED by the Council of the Town of Chapel Hill that the Council hereby authorizes the settlement of the pending lawsuit between the Town of Chapel Hill and City of Durham by the execution of a Consent Judgment to include the following items:

- 1) That the line shown on the map attached hereto be established as being the line across which neither municipality
  - a) will accept or process any petition for annexation of any land; or
  - b) will initiate or process any unilateral annexation of any land; or
  - c) will take any other steps to annex any land.

It is the clear and express intent of the Town of Chapel Hill by adopting this resolution and authorizing the Consent Judgment, that the corporate limits of the Town of Chapel Hill, now located

generally west and south of this line, will not cross the line to the east and north and that the corporate limits of the City of Durham, now located generally east and north of of this line, will not cross the line to the west and south;

- 2) That any actions taken in the past or future by either municipality to annex territory consistent with this line will not be challenged or interfered with by the other municipality.

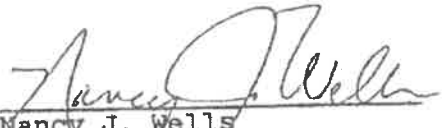
BE IT FURTHER RESOLVED that it is the express intent of the Council of the Town of Chapel Hill that the adoption of a resolution in accordance with these terms by the Councils of Durham and Chapel Hill and settlement of the pending lawsuit in accordance with these terms shall constitute a binding agreement between the Town of Chapel Hill and City of Durham regarding future annexations by both municipalities.

BE IT FURTHER RESOLVED that the Council hereby authorizes and directs the Manager and Attorney to sign a Consent Judgment in the pending lawsuit to carry out the terms of this resolution.

BE IT FURTHER RESOLVED that this resolution by the Council of the Town of Chapel Hill is contingent upon adoption of a substantially identical resolution by the Council of the City of Durham by July 22, 1986.

This is the 14th day of July, 1986.

I hereby certify that this is a true and correct copy of Resolution 86-7-14/R-23 as adopted by the Mayor and Council of the Town of Chapel Hill on the 14th day of July, 1986.

  
Nancy J. Wells  
Town Clerk

  
Date



Exhibit B

RESOLUTION AUTHORIZING THE SETTLEMENT OF THE LAWSUIT  
TOWN OF CHAPEL HILL v. CITY OF DURHAM 85 CVS 3108 (DURHAM  
COUNTY) AND APPROVING A LINE REPRESENTING THE LIMITS FOR  
FUTURE ANNEXATIONS BY THE CITY OF DURHAM AND TOWN OF  
CHAPEL HILL.

WHEREAS, there exists a dispute between the City of Durham and Town of Chapel Hill over annexation of areas between the two municipalities; and

WHEREAS, a lawsuit, Town of Chapel Hill v. City of Durham '85 CVS 3108 (Durham County), was initiated challenging the validity of certain annexation actions taken by the City of Durham; and

WHEREAS, the City of Durham and Town of Chapel Hill have each taken other procedural annexation steps which conflict with immediate annexation steps and long-range annexation goals of the other; and

WHEREAS, substantial unresolved legal questions remain in the pending lawsuit; and

WHEREAS, the City of Durham and Town of Chapel Hill, through their respective governing bodies, believe it is proper and in the best interests of the municipalities, their citizens, and the urbanizing areas between the two municipalities to resolve their dispute and differences in these areas by consent and agreement rather than continuing litigation and to proceed to resolve regional concerns in a spirit of cooperation; and

WHEREAS, resolution of this conflict by consent and agreement will allow owners and purchasers of land in urbanizing areas between the two municipalities to know where to look for future urban services; and

WHEREAS, resolution of this conflict will aid long-range planning efforts of the two municipalities as the unincorporated areas urbanize or otherwise become eligible for annexation to one or both municipalities;

NOW, THEREFORE, BE IT RESOLVED by the City Council of the City of Durham that the Council hereby authorizes the settlement of the pending lawsuit between the Town of Chapel Hill and City of Durham by the execution of a Consent Judgment to include the following items:

- (1) That the line shown on the map attached hereto be established as being the line across which neither municipality
  - (a) will accept or process any petition for annexation of any land; or

(b) will initiate or process any unilateral annexation of any land; or

(c) will take any other steps to annex any land.

It is the clear and express intent of the City of Durham by adopting this resolution and authorizing the Consent Judgment, that the corporate limits of the City of Durham, now located generally east and north of this line, will not cross the line to the west and south and that the corporate limits of the Town of Chapel Hill, now located generally west and south of this line, will not cross the line to the east and north.

(2) That any actions taken in the past or future by either municipality to annex territory consistent with this line will not be challenged or interfered with by the other municipality.

BE IT FURTHER RESOLVED that it is the express intent of the City Council of the City of Durham that the adoption of a resolution in accordance with these terms by the Councils of the City of Durham and Town of Chapel Hill and settlement of the pending lawsuit in accordance with these terms shall constitute a binding agreement between the Town of Chapel Hill and City of Durham regarding future annexations by both municipalities.

BE IT FURTHER RESOLVED that the City Council hereby authorizes and directs the City Manager and City Attorney to sign a Consent Judgment in the pending lawsuit to carry out the terms of this resolution.

BE IT FURTHER RESOLVED that this resolution by the City Council of the City of Durham is contingent upon adoption of a substantially identical resolution by the Council of the Town of Chapel Hill by July 22, 1986.

This the 14th day of July, 1986.

NORTH CAROLINA  
DURHAM COUNTY

I, Margaret M. Bowers, duly appointed City Clerk of the City of Durham, do hereby certify that the above Resolution was adopted by the City Council of the City of Durham at a Special Meeting of July 14, 1986, and is on file in the office of the City Clerk at City Hall.

WITNESS my hand and the Corporate Seal of the City of Durham, this the 5th day of November, 1986.

*Margaret M. Bowers*  
Margaret M. Bowers, CMC  
City Clerk



Exhibit D

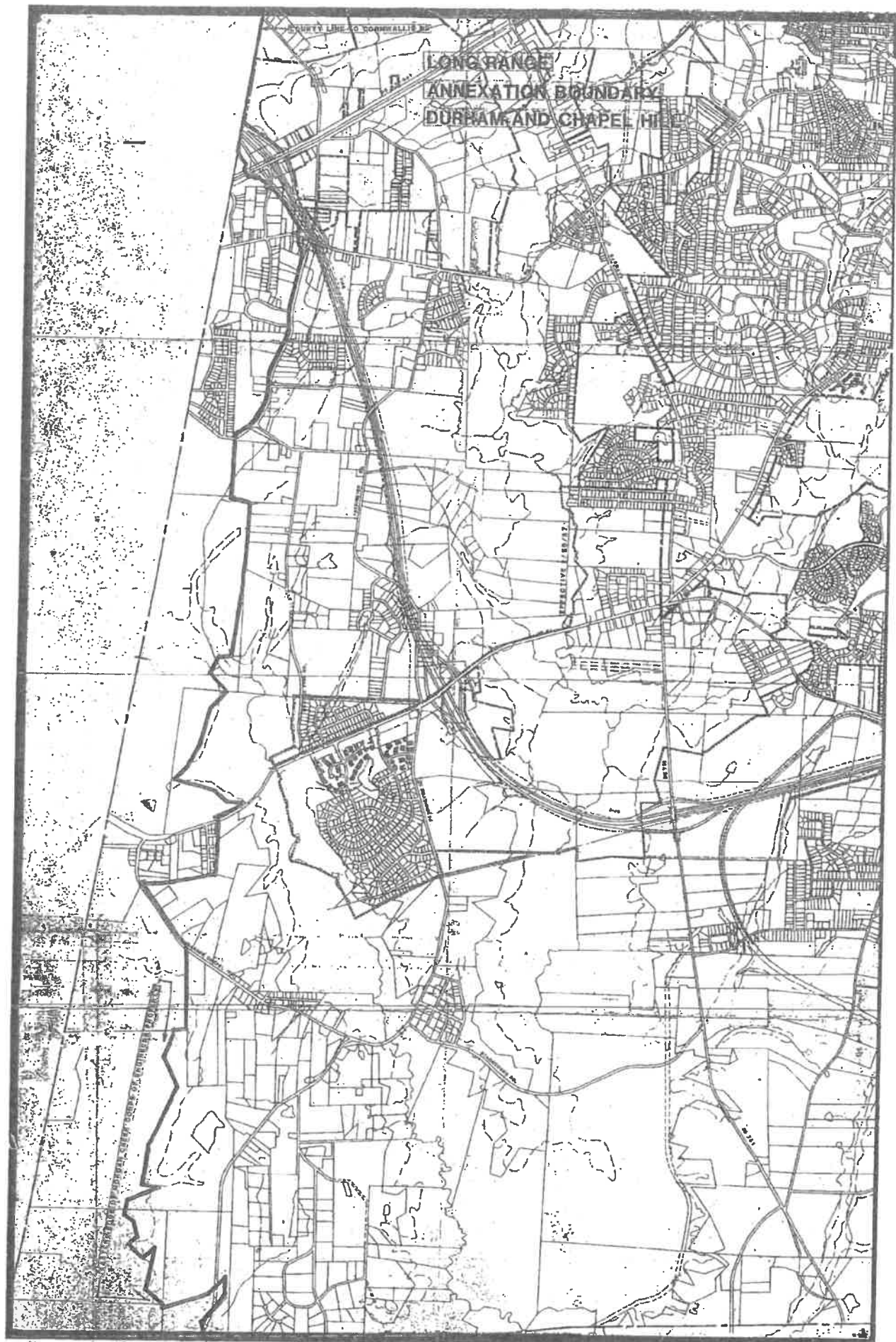
## PROPOSED LONG RANGE ANNEXATION BOUNDARY

## DURHAM AND CHAPEL HILL

BEGINNING at a point on the Orange-Durham County line where said line intersects the southern right-of-way of Cornwallis Road; running thence along the Orange-Durham County line in a southerly direction approximately 21,500 feet to the intersection of the Orange-Durham County line and the southern right-of-way of I-40; thence along the southern right-of-way of I-40 in a southeasterly direction approximately 2800 feet to the intersection of the southern right-of-way of I-40 and the western right-of-way of Pope Road; thence along the western right-of-way of Pope Road and the northern right-of-way of Ephesus Church Road in a southerly direction approximately 6000 feet to a point on the northern right-of-way of Ephesus Church Road, said point being a projection of the eastern property line of Tract 2 of the DuBose Property as shown on the plat "Survey of David St. Pierre DuBose, Jr." dated February 12, 1986, Durham County Plat Book 110, Page 159; thence across Ephesus Church Road S 01-08-10 W approximately 60 feet to a point on the southern right-of-way of Ephesus Church Road, the northeast corner of said DuBose tract; thence along said property line S 01-08-10 W 1028.19 feet to a concrete monument; thence along the western property line of a 29-acre tract as shown on Durham County Plat Book 37, Page 45 S 05-00-00 W 714 feet to a monument; thence along the southern property line of said 29-acre tract S 84-05 E 543 feet to an iron pin, as shown on said Plat Book 110-158, the northwest corner of the Specia Moore, Sr. lot; thence along DuBose's eastern property line S 00-46-54 E 313.74 feet, S 00-34-56 E 520.39 feet, and S 00-38-45 E 345.34 feet to an iron pin, the southwest corner of the Elvie King lot; thence along the western property line of a 16.68-acre tract as shown on Durham County Plat Book 28-02 S 02-53 W 990.8 feet to the southwest corner of said 16.68-acre tract; thence continuing along the western property line of a 29.61-acre tract, Deed Book 127, Page 174, in a southerly direction approximately 1750 feet to a point on the B. Everett Jordan Dam and Lake Project, as shown on the U. S. Army Corps of Engineers Project Map, Segment "19", said point being located between stations 760 and 761; thence along the B. Everett Jordan Project western property line S 83-36-04.9 W approximately 550 feet to a monument, station 760; thence S 30-01-55 W 541.81 feet to a monument, station 733; thence continuing from station 733 to station 725 the following bearings and distances: S 48-59-30.7 E 688.205, S 42-04-46.9 W 571.726, S 14-03-02.1 W 754.229, S 20-41-18.4 W 719.949, S 43-14-14.7 W 638.742, S 70-55-24.2 E 1124.828, S 47-23-20.1 E 385.243, S 87-51-49.7 E 464.031; thence continuing with said property line in a southwesterly direction to the northern right-of-way of N.C. 54; thence along the northern right-of-way line of N.C. 54 in a westerly direction to a point on said right-of-way, said point being a projection of the eastern property line of Sherwood Forest Subdivision as shown on Durham County Plat Book 30, Page 49; thence across N.C. 54 to a point on the southern right-of-way, the northeast corner of said subdivision; thence along the eastern property line of said

subdivision S 02-45 W approximately 579 feet; thence along said line S 06-18 W approximately 788 feet to the southeast corner of said subdivision; thence along the southern property line of said subdivision S 78-43 W approximately 389 feet to the southwest corner of Sherwood Forest Subdivision; thence continuing in a westerly direction along the southern property line of Lots 28, 12, 23 and 24, Block 5, Durham County Tax Map 491 approximately 1650 feet to a point on the eastern right-of-way of Barbee Chapel Road; thence along the eastern right-of-way of Barbee Chapel Road in a southeasterly direction approximately 2100 feet to a point on the northeastern right-of-way, said point being a projection of eastern property line of the University of North Carolina Mason Farm property; thence across Barbee Chapel Road S 01-55 E approximately 70 feet to the southwestern right-of-way of said road, the northeast corner of the University of North Carolina Mason Farm property; thence along said eastern property line S 01-55 E 2036.72 feet to the southeast corner of said property; thence along the southern property line of said property S 88-20 W approximately 790 feet to a point where the Mason Farm property line intersects the property line of the B. Everett Jordan Dam and Lake Project, as shown on the U. S. Army Corps of Engineers Project Map, segment "18"; thence along said property line S 18-13-51.9 E approximately 35 feet to station 593; thence continuing from station 593 to station 612 the following bearings and distances: S 25-13-20.5 W 628.157, S 25-37-16.4 E 861.188, S 24-05-45.5 W 1760.320, S 08-51-38.4 W 1094.710, S 85-59-59.6 E 474.352, S 61-23-46.3 W 993.702, S 17-13-41.0 W 377.241, S 73-55-29.3 E 264.451, S 01-09-49.3 E 688.853, S 47-08-23.7 W 410.232, S 70-00-43.3 E 398.486, N 46-10-16.2 E 423.521, S 02-16-57.8 W 1101.648, S 56-36-55.4 E 652.068, S 00-37-35.9 W 233.201, N 69-12-24.0 E 1315.976, N 48-27-28.7 E 673.841, S 03-17-26.7 E 409.549, S 38-41-45.9 W 1041.911; thence continuing with said property line S 16-35-17.7 E approximately 600 feet to a point where the B. Everett Jordan Lake property line intersects the Durham-Chatham County line, said point being located approximately 4900 feet east of the southeast corner of Orange County.







# TOWN OF CHAPEL HILL

Town Hall  
405 Martin Luther King Jr.  
Boulevard  
Chapel Hill, NC 27514

## Item Overview

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**Item #:** 2., **File #:** [22-0342], **Version:** 1

**Meeting Date:** 4/27/2022

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### Approve all Consent Agenda Items.

**Staff:**

Sabrina M. Oliver, Director/Town Clerk  
Amy T. Harvey, Deputy Town Clerk

**Department:**

Communications and Public Affairs

**Overview:** Items of a routine nature to be voted on in a block. Any item may be removed from the Consent Agenda by the request of the Mayor or any Council Member.

**Recommendation(s):**

That the Council adopt the various resolutions and ordinances.

**Fiscal Impact/Resources:** Please refer to each agenda item for specific fiscal notes.

**Attachments:**

- Resolution

**A RESOLUTION ADOPTING VARIOUS RESOLUTIONS AND ENACTING VARIOUS ORDINANCES  
(2022-04-27/R-1)**

BE IT RESOLVED by the Council of the Town of Chapel Hill that the Council hereby adopts the following resolutions and ordinances as submitted by the Town Manager in regard to the following:

- 3 Amend Chapter 2, Article IV, Section 2-72 of the Town Code of Ordinances Regarding Campaign Contribution Limitations. (O-1)
- 4 Endorse the County-Wide Coordinated Manufactured Homes Action Plan. (R-2)
- 5 Call a Public Hearing to Consider a Request to Close a Portion of an Unmaintained and Unimproved Public Right-of-Way of Stinson Street on June 8, 2022. (R-3)
- 6 Amend the 2021-22 Council Calendar. (R-4)

This the 27<sup>th</sup> day of April 2022.

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**The Agenda will reflect the text below and/or the motion text will be used during the meeting.**

By adopting the resolution, the Council can approve various resolutions and ordinances all at once without voting on each resolution or ordinance separately.



# TOWN OF CHAPEL HILL

Town Hall  
405 Martin Luther King Jr.  
Boulevard  
Chapel Hill, NC 27514

## Item Overview

Item #: 3., File #: [22-0343], Version: 1

Meeting Date: 4/27/2022

### Amend Chapter 2, Article IV, Section 2-72 of the Town Code of Ordinances Regarding Campaign Contribution Limitations.

#### Staff:

Maurice Jones  
Ann Anderson

#### Department:

Town Manager  
Town Attorney

**Overview:** The Town established campaign contribution limits in 1999 pursuant to special legislation enacted by the General Assembly. Chapter 2, Article IV, of the Town Code of Ordinances limits the amount of money that an individual or a political committee can contribute to a Mayor or Town Council candidate's campaign. The Ordinance also establishes a maximum contribution that can be made without disclosing the contributor's name in municipal campaign reports. Ordinance [Section 2-73](https://library.municode.com/nc/chapel_hill/codes/code_of_ordinances?nodeId=CO_CH2AD_ARTIVCADICOLI_S2-73ADCRDICOLICO) requires that these amounts be adjusted during even-numbered years and provides criteria for making these adjustments based on the number of Town of Chapel Hill registered voters and changes in the Consumer Price Index (CPI) since January 1<sup>st</sup> of the prior even-numbered year. The adjustments proposed for tonight, if enacted, will apply to the 2023 municipal campaigns.



#### Recommendation(s):

That the Council enact the attached ordinance to decrease the municipal campaign maximum contribution to \$357.00 and the contribution disclosure exemption to \$37.00 as required by ordinance.

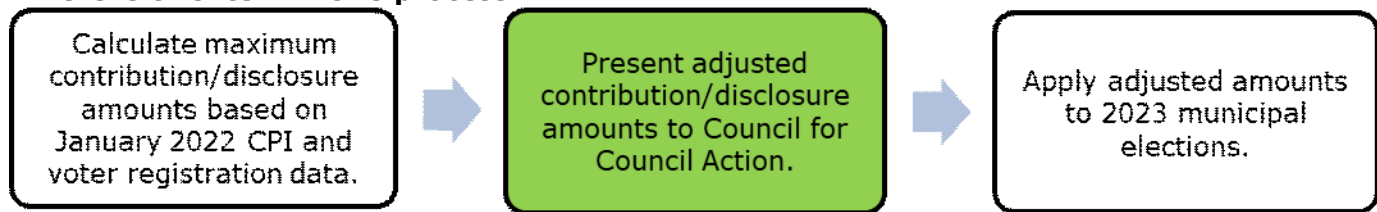
#### Background:

- In 2021, the maximum amount that an individual or political committee could donate to a municipal candidate's campaign was \$378.00 and the names of contributors donating \$39.00 or less were exempt from disclosure in campaign reports.
- Council established the 2021 amounts on [May 6, 2020](https://chapelhill.legistar.com/LegislationDetail.aspx?ID=4432412&GUID=B1D4BDE5-5B72-4438-)

#### Decision Points:

- Based on data obtained for January 2022 (as required by Sec. 2-73 of the Town Code), the CPI change since January 2020 is 4.54% and active voter registration for the Town of Chapel Hill is 35,209.
- While the CPI Change is up from the 4.46% change used for the last round of adjustments, the Base Voters amount is down from the prior amount of 38,373.
- Based on the adjustment criteria established in Ordinance Sec. 2-73, maximum contribution and disclosure exemption amounts for the 2023 municipal campaigns should be decreased to \$357.00 and \$37.00, respectively.

**Fiscal Impact/Resources:** None to the Town

**Where is this item in this process?****Attachments:**

- Ordinance
- Disclosure and Contribution Adjustments Worksheet

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**The Agenda will reflect the text below and/or the motion text will be used during the meeting.**

By enacting the ordinance, the Council decreases the municipal campaign maximum contribution to \$357.00 and the contribution disclosure exemption to \$37.00 as required by ordinance.

**AN ORDINANCE AMENDING THE DISCLOSURE EXEMPTION AND MAXIMUM CONTRIBUTION LIMITS IN CHAPTER 2, ARTICLE IV OF THE TOWN CODE OF ORDINANCES AS REQUIRED BY ORDINANCE (2022-04-27/O-1)**

WHEREAS, Chapter 2, Article IV, Campaign Disclosure and Contribution Limitations of the Town Code of Ordinances limits the amount of money that an individual or a political committee can contribute to a Mayor or Town Council candidate's campaign; and

WHEREAS, Chapter 2, Article IV further limits the amount that an individual or a political committee can contribute to a Mayor or Town Council candidate's campaign without disclosing the contributor's name in municipal campaign reports filed in accordance with Chapter 163, Article 22A, Part 2 of the North Carolina General Statutes; and

WHEREAS, Chapter 2, Article IV further requires that these amounts be adjusted during even-numbered years and provides criteria for making these adjustments based on changes in the Consumer Price Index since January 1 of the prior even-numbered year and the number of Town of Chapel Hill registered voters.

NOW, THEREFORE, BE IT ORDAINED by the Council of the Town of Chapel Hill that the Council amend Chapter 2, Article IV of the Code of Ordinances of the Town of Chapel Hill as follows:

Section 1. **Sec. 2-71. - Disclosure of contributors, subsection (b)**, is amended to read as follows:

“(b) Names of contributors of amounts ~~thirty-nine dollars (\$39.00)~~ **thirty-seven dollars (\$37.00)** or less are exempt from the requirements of this section.”

Section 2. **Sec. 2-72. - Limitation on contributions**, is amended to read as follows:

“Except as provided by N.C.G.S. 163-278.13(d), no individual or political committee shall contribute to any candidate, or political committee of a candidate, any money or make any other contribution in any town municipal election in excess of ~~three hundred seventy-eight dollars (\$378.00)~~ **three hundred fifty-seven dollars (\$357.00)** for that election.”

Section 3. This Ordinance shall be effective upon enactment.

This the 27<sup>th</sup> day of April, 2022.

| Campaign Disclosure and Contribution Adjustments Based on Ordinance 2017-02-27/O-5<br>Rolling Average CPI Adjustment and Compared to Base Voter Numbers (40,000) |                                   |              |             |                   |                           |            |               |                       |                         |
|--|-----------------------------------|--------------|-------------|-------------------|---------------------------|------------|---------------|-----------------------|-------------------------|
| Year   | CPI in \$<br>(Prior 2-Yr Average) | CPI % Change | Base Voters | Units of<br>2,000 | Voter Adjust vs<br>40,000 | Disclosure | Contrib Limit | Rounded<br>Disclosure | Rounded<br>Contribution |
| 2016   | 236.88                            |              |             |                   |                           | 36.00      | 353.00        | 36.00                 | 353.00                  |
| 2018   | 242.57                            | 2.40%        | 39382       | 0                 | 0%                        | 36.86      | 361.48        | 37.00                 | 361.00                  |
| 2020   | 253.38                            | 4.46%        | 38373       | 0                 | 0%                        | 38.65      | 377.60        | 39.00                 | 378.00                  |
| 2022   | 264.89                            | 4.54%        | 35209       | -2                | -10%                      | 36.87      | 356.99        | 37.00                 | 357.00                  |

Prepared by Town of Chapel Hill staff  
4/4/2022



# TOWN OF CHAPEL HILL

Town Hall  
405 Martin Luther King Jr.  
Boulevard  
Chapel Hill, NC 27514

## Item Overview

Item #: 4., File #: [22-0309], Version: 1

Meeting Date: 4/27/2022

### Endorse the County-Wide Coordinated Manufactured Homes Action Plan.

#### Staff:

Sarah Osmer Viñas, Director  
Nate Broman-Fulks, Assistant Director

#### Department:

Affordable Housing and Community Connections

**Overview:** The County-Wide Manufactured Homes Action Plan is designed to provide a plan to address the redevelopment threats facing manufactured home communities in Orange County. The Plan is a collaborative effort between the Towns of Chapel Hill, Carrboro, and Hillsborough, and Orange County that outlines specific objectives, strategies, action steps, partners and resource needs to address the redevelopment threat facing manufactured home communities.



#### Recommendation(s):

That the Council adopt the resolution endorsing the County-Wide Manufactured Homes Action Plan.

#### Background

- In 2016-2017, the County, Towns, and local housing partners formed a manufactured homes work group to begin to discuss and evaluate opportunities and obstacles to addressing the needs of manufactured home community residents.
- There are 100 manufactured home communities in Orange County housing over 2,000 households.
- As development pressures increased for the northern part of Chapel Hill, in 2018, the Town began creating a strategy to proactively engage residents and owners of the four manufactured home communities in Town to develop a plan should future redevelopment occur on any of these sites.
- There has been extensive progress in implementing the Strategy, as outlined in the attached *Strategy Report to Council - January 2021*.
- In 2021, staff from the Towns and County came together to form the Manufactured Home Staff Working Group to create a plan to address the redevelopment and sustainability threats facing manufactured home communities in Orange County. This plan used resident engagement and the Town's existing Manufactured Home Strategy as its foundation.
- On [April 6, 2022 <https://chapelhill.legistar.com/LegislationDetail.aspx?ID=5542615&GUID=F94D2489-F350-4809-AE76-C684340451EA&Options=&Search=>](https://chapelhill.legistar.com/LegislationDetail.aspx?ID=5542615&GUID=F94D2489-F350-4809-AE76-C684340451EA&Options=&Search=>) the Town Council reviewed and provided feedback on the draft plan and directed staff to bring the Action Plan back to Council for their approval at a later meeting.
- The Carrboro Town Council and Hillsborough Board of Commissioners endorsed the plan on April 5<sup>th</sup> and April 11<sup>th</sup>, 2022, respectively.

#### Action Plan Overview

The Action Plan is a collaborative effort between the Towns of Chapel Hill, Carrboro, and Hillsborough, and Orange County that outlines specific objectives, strategies, action steps, partners and resource needs to address the redevelopment threat facing manufactured home communities to:

1. Preserve manufactured home communities.
2. Minimize resident displacement due to redevelopment
3. Create a Relocation Assistance Package to provide meaningful relocation assistance options for residents facing displacement.



This Action Plan establishes four guiding principles:

1. Use engagement findings as foundation for strategy selection and implementation.
2. Include a variety of strategies to fully address the different issues. There is no silver bullet.
3. Manufactured housing is an important source of naturally occurring affordable housing serving diverse populations, including vulnerable community members.
4. The Plan is a living document and should be adapted based on changing conditions and resident input.

The Action Plan is designed to provide a comprehensive approach to a county-wide challenge. Each jurisdiction has the flexibility to determine the best strategies to meet the specific needs of their community.

### Next Steps

Many of the strategies outlined in the new Action Plan are already underway. Additionally, staff have identified the following immediate next steps:

1. Continued engagement with residents
  - a. Distribute new Resource Guide for Residents of Manufactured Housing
  - b. Collaborate with community partners to carry out ongoing engagement to build leadership and sustained involvement of residents
2. Continue work already underway
3. Pursue priority strategies not yet underway
4. Continue collaboration efforts with government and nonprofit partners

**Fiscal Impact/Resources:** There is no fiscal impact related to endorsing the plan. Each strategy identified in the plan has a fiscal impact, most of which require Council or Town Manager approval before implementation, including ongoing engagement efforts. The Action Plan includes preliminary, high-level estimates of resource needs for each strategy.



### Attachments:

- Resolution
- County-Wide Manufactured Homes Action Plan
- Manufactured Home Community Map

**A RESOLUTION ENDORSING THE COUNTY-WIDE MANUFACTURED HOMES ACTION PLAN (2022-04-27/R-2)**

WHEREAS, Orange County and the towns of Carrboro, Chapel Hill, and Hillsborough have a long history of collaboration on housing topics; and

WHEREAS, manufactured housing is an important source of naturally occurring affordable housing serving diverse populations and vulnerable community members; and

WHEREAS, in 2016, several manufactured home communities in our County were identified for redevelopment by property owners triggering the potential displacement of current residents; and

WHEREAS, the towns and county formed a work group with local housing partners to understand the risk, and potential remedies associated with this redevelopment issue, and strategies for improving and maintaining the quality of the manufactured home communities; and

WHEREAS, the work group generated a report on their findings and an inventory of manufactured housing communities in the county; and

WHEREAS, the environment for redevelopment has not abated and remains a constant threat for manufactured home parks in our community; and

WHEREAS, an updated, county-wide strategy, based upon prior findings and the current environment, is needed to preserve manufactured home communities, minimize resident displacement due to redevelopment, and provide meaningful relocation assistance options to be in place moving forward; and

WHEREAS, the Manufactured Home Staff Working Group with staff from the Town of Chapel Hill, Town of Carrboro, Town of Hillsborough, and Orange County came together to develop this coordinated plan; and

WHEREAS, extensive engagement with residents in communities at risk was conducted to understand their concerns and preferences to guide the creation of the strategies included in the plan; and

WHEREAS, service providers, advocates, residents, and other stakeholders were consulted on development of the plan and staff incorporated feedback from the Orange County Local Government Affordable Housing Collaborative, the Carrboro Affordable Housing Commission, the Chapel Hill Housing Advisory Board, the Orange County Affordable Housing Advisory Board, the Orange County Affordable Housing Coalition, the Manufactured Homes Committee of the Orange County Affordable Housing Coalition.

NOW, THEREFORE, BE IT RESOLVED by the Council of the Chapel Hill that the Council endorses the County-Wide Manufactured Homes Action Plan and commits to work cooperatively with the County and other towns to implement the strategies both within Chapel Hill and the County at large.

BE IT FURTHER RESOLVED that the Council authorizes the Town Manager to make adjustments to the County-Wide Manufactured Homes Action Plan, as described in the April 6<sup>th</sup> and 27<sup>th</sup>, 2022 meeting materials, based on Town Council input during the same meetings and as needed as the Towns and County move into implementation.

This the 27th day of April 2022.

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**Item #: 4., File #: [22-0309], Version: 1**

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**Meeting Date: 4/27/2022**

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**The Agenda will reflect the text below and/or the motion text will be used during the meeting.**

By adopting the resolution, the Council endorses the County-Wide Manufactured Homes Action Plan.



## **County-Wide Manufactured Homes Action Plan** **Orange County, North Carolina**

**Jointly Developed by the Manufactured Home Staff Working Group of the Towns of Carrboro, Chapel Hill, and Hillsborough and Orange County**

### **Introduction**

The Manufactured Homes Strategy Action Plan is designed to provide a plan to address the redevelopment threats facing manufactured home communities in Orange County. The Plan is a collaborative effort between the Towns of Chapel Hill, Carrboro, Hillsborough, and Orange County that outlines specific objectives, strategies, action steps, partners and resource needs to address the redevelopment threat facing manufactured home communities. If we are successful in implementing this action plan, we will:

1. Preserve manufactured home communities.
2. Minimize resident displacement due to redevelopment
3. Create a Relocation Assistance Package to provide meaningful relocation assistance options for residents facing displacement.

Housing and Community staff from the local governments will be playing a leading role in implementing the strategies and action steps listed in the plan, while also collaborating with many Town and County departments and community partners.

This plan recognizes manufactured housing is an important source of naturally occurring affordable housing serving diverse populations, including vulnerable community members. It uses resident engagement as the foundation for the strategies proposed.

### **Guiding Principles**

1. Use engagement findings as foundation for strategy selection and implementation.
2. Include a variety of strategies to fully address the different issues. There is no silver bullet.
3. Manufactured housing is an important source of naturally occurring affordable housing serving diverse populations, including vulnerable community members.
4. The Plan is a living document and open to input and change.

### **The Challenge**

Several manufactured home communities in the county are under threat of redevelopment and resident displacement. Many homes are also in need of repair and rehab assistance. There are unique challenges faced by manufactured home residents, most of whom own the homes they live in but not the land it sits on. This plan provides a framework and strategies to address these challenges while considering the limited authority and resources of local governments and community partners.

## County-Wide Manufactured Homes Strategy Action Plan

### Background

For many years, there has been interest in addressing the vulnerability of residents living in manufactured home communities (MHC) in Orange County. In 2016-2017, the County, Towns, and local housing partners formed a manufactured homes work group to begin to discuss and evaluate opportunities and obstacles to addressing the needs of manufactured home community residents. This work group created an inventory of MHCs and a survey to inform any strategies developed. You can find a copy of the inventory and survey results as attachments to this action plan.

Resident engagement has been the foundation for strategies that have been developed by partners to address the needs of the MHCs and continues to be with this Action Plan. Resident engagement has included in person meetings, focus groups, and surveys to understand the housing needs and preferences of manufactured home residents in the county.

There are many things we have learned from resident engagement and the inventory of MHCs. There are 100 manufactured home communities in Orange County housing over 2,000 households. According to the 2017 Orange County Mobile Home Park Survey, there is a 10% vacancy rate in the parks, with many parks having no vacancy at all.

Many of the homes need repairs or renovations. About half of manufactured homes need minor repairs and about 28% need major repairs, with only a small percentage, 3.2%, economically infeasible to repair. Most residents are of low-income, making it difficult to fund needed repairs.

We also know many of the MHCs are under threat to be redeveloped, in particular the MHCs closer to town centers where market demand is high. The research and engagement show there are many challenges for manufactured home residents finding new housing if displacement were to occur. Few vacancies exist in MHCs in Orange County, most households own their homes, are low income, and do not have many options for finding affordable housing that meets the needs of their family. The human and financial costs to implement a relocation package are significant and will vary depending on the MHC and severity of displacement.

### Key Terms

- **Strategic Objective:** The longer-term, wider change needed.
- **Strategy:** The planned actions that will help achieve the strategic objective.
- **Action Step:** The benefit expected to occur.
- **Partners:** Town departments, community organizations, and institutions that will assist with strategy implementation.
- **Resources:** The goods and/or services needed. The figures provided in this document are preliminary estimates and subject to change as we implement the Action Plan.










## County-Wide Manufactured Homes Strategy Action Plan

- **Manufactured Home:** Factory-built housing, constructed on or after June 15, 1976 and subject to construction standards established by the Department of Housing and Urban Development (HUD).
- **Mobile Home:** Built prior to June 15, 1976, most, but not all, adhere to American National Standards Institute (ANSI) standards.
- **Manufactured Home Community (MHC):** Though laws often refer to “mobile home parks”, the term “manufactured home community” is a common industry term. We use it in this Plan to reduce stigma and set aside the idea that mobility is a key feature of the housing, recognize that houses are homes to the individuals who live in them, and these purpose-built places are communities of people.

*To find a list of partner agencies, see page 10*

## County-Wide Manufactured Homes Strategy Action Plan

### Strategic Objective 1: Preserve manufactured home communities.

|  | Strategy   | Action Steps   | Lead Entity and Potential Partners  | Resources   |
|--|--|--|---|---|
| 1a<br> | Support efforts to create resident-owned communities (ROCs)                      | <ul style="list-style-type: none"> <li>Assist ROC USA and CCE in exploring opportunities to form ROCs</li> <li>Provide funding assistance for acquisition</li> <li>Support resident engagement efforts</li> </ul>  | <b>Lead:</b> County and Towns <ul style="list-style-type: none"> <li>ROC USA</li> <li>Carolina Common Enterprise</li> <li>MHC Owners</li> <li>MHC Residents</li> <li>Nonprofit Providers</li> </ul> | \$\$\$\$<br>   |
| 1b<br> | Pursue acquisition opportunities of manufactured home communities                | <ul style="list-style-type: none"> <li>Explore opportunities to preserve MHPs through acquisition</li> <li>Use available funding sources for acquisition</li> </ul>  | <b>Lead:</b> County and Towns <ul style="list-style-type: none"> <li>MHC Owners</li> <li>Nonprofit Providers</li> </ul>   | \$\$\$\$\$<br> |
| 1c<br> | Explore land use policies that support manufactured home communities             | <ul style="list-style-type: none"> <li>Conduct study of effective land use policies to support preservation</li> <li>Consult with policy experts to determine policy recommendations</li> </ul>  | <b>Lead:</b> Towns <ul style="list-style-type: none"> <li>Consultants</li> <li>UNC School of Government</li> <li>Planning Departments</li> </ul>  | \$<br>         |
| 1d   | Work with manufactured homeowners to improve park quality                        | <ul style="list-style-type: none"> <li>Engage MHP owners in need of infrastructure improvements</li> <li>Provide infrastructure improvement loans to improve quality of MHPs</li> <li>Implement the County's land banking program</li> </ul>   | <b>Lead:</b> County <ul style="list-style-type: none"> <li>MHC Owners</li> <li>MHC Residents</li> </ul>   | \$\$<br>       |
| 1e   | Rehab and repair homes in MHPs   | <ul style="list-style-type: none"> <li>Coordinate with the OC Preservation Coalition to facilitate the completion of home repairs, weatherization, and use of residents' skilled labor</li> <li>Explore aligning rehab programs and policies between jurisdictions to increase homes repaired</li> </ul> | <b>Lead:</b> Partners <ul style="list-style-type: none"> <li>OC Home Preservation Coalition</li> <li>MHC Residents</li> </ul>   | \$\$<br>      |
| 1f   | Create an early warning system to identify MHPs at highest risk of redevelopment | <ul style="list-style-type: none"> <li>Identify key indicators to include in early warning system</li> </ul>   | <b>Lead:</b> Towns <ul style="list-style-type: none"> <li>GIS and Planning Departments</li> <li>MHC Owners</li> </ul>   | \$<br>       |

\$\$\$ \* indicates \$1 million or more

 = policy or funding decision required by elected body

\$ = level of financial resources needed collectively

 = level of staff resources needed collectively

## County-Wide Manufactured Homes Strategy Action Plan

**Strategic Objective 2:** Minimize resident displacement due to redevelopment.

|         | Strategy   | Action Steps   | Partners   | Resources            |
|---------|--|--|--|----------------------|
| 2a<br>★ | Pursue on-site and off-site home construction as part of redevelopment                                 | <ul style="list-style-type: none"> <li>Work with developer applicants to explore relocation options within or outside of a proposed redevelopment</li> </ul>                                     | <b>Lead:</b> County and Towns<br><ul style="list-style-type: none"> <li>Developers</li> </ul>  | \$ - \$\$\$\$<br>👤 👤 |
| 2b<br>★ | Explore land use and regulatory policies that can be applied to redevelopment of MHPs                  | <ul style="list-style-type: none"> <li>Conduct study of effective land use policies to minimize displacement</li> <li>Consult with policy experts to determine policy recommendations</li> </ul> | <b>Lead:</b> County and Towns<br><ul style="list-style-type: none"> <li>Consultants</li> <li>UNC School of Government</li> <li>Planning Departments</li> </ul> | \$<br>👤 👤            |
| 2c<br>★ | Implement master planning processes to proactively create development plans that minimize displacement | <ul style="list-style-type: none"> <li>Explore sites that would be good candidates for master planning</li> <li>Engage stakeholders to gauge master planning interest</li> </ul>                 | <b>Lead:</b> County and Towns<br><ul style="list-style-type: none"> <li>MHC Owners</li> <li>Planning Departments</li> <li>Consultants</li> </ul>               | \$<br>👤 👤 👤          |

★ = policy or funding decision required by elected body







\$ = level of financial resources needed collectively

👤 = level of staff resources needed collectively



## County-Wide Manufactured Homes Strategy Action Plan

**Strategic Objective 3:** Create a Relocation Assistance Package\* to provide meaningful relocation assistance options for residents facing displacement.

|         | Strategy   | Action Steps   | Partners  | Resources   |
|---------|--|--|---|---|
| 3a      | Proactive engagement to connect MH residents with resources      | <ul style="list-style-type: none"> <li>Establish partnership with nonprofit providers to structure program</li> <li>Provide funding to create a sustainable program</li> </ul>   | <b>Lead:</b> County and Towns <ul style="list-style-type: none"> <li>Nonprofit providers</li> </ul>   | \$<br>     |
| 3b<br>★ | Use publicly owned land to create relocation opportunities       | <ul style="list-style-type: none"> <li>Explore the use of publicly owned land to develop affordable housing as an indirect site for relocation</li> <li>Explore publicly owned land for creation of new MHCs</li> </ul>                                  | <b>Lead:</b> County and Towns <ul style="list-style-type: none"> <li>Engineering and design consultants</li> <li>Affordable housing developers</li> <li>MHC owners and experts</li> </ul> | \$\$\$<br> |
| 3c      | Provide housing search assistance                                | <ul style="list-style-type: none"> <li>Provide one-on-one housing location assistance</li> </ul>   | <b>Lead:</b> Partners <ul style="list-style-type: none"> <li>Nonprofit providers</li> <li>OCPEH</li> </ul>  | \$\$<br>   |
| 3d      | Identify manufactured home communities with open lots            | <ul style="list-style-type: none"> <li>Engage MHP owners to determine sites with vacancies</li> <li>Create MHP vacancy database</li> </ul>   | <b>Lead:</b> County and Towns <ul style="list-style-type: none"> <li>MHC owners</li> <li>OC Housing Helpline</li> <li>Nonprofit providers</li> </ul>                                      | \$<br>     |
| 3e<br>★ | Provide financial assistance to relocate homes                   | <ul style="list-style-type: none"> <li>Determine funding needed to relocate homes</li> </ul>   | <b>Lead:</b> Partners <ul style="list-style-type: none"> <li>Developers</li> <li>MHC owners and experts</li> <li>Nonprofit providers</li> </ul>   | \$\$<br> |
| 3f<br>★ | Provide financial assistance for residents to secure new housing | <ul style="list-style-type: none"> <li>Determine type of assistance needed               <ul style="list-style-type: none"> <li>EHA</li> <li>Rental Assistance (security/utility deposits, rent)</li> <li>Down payment assistance</li> </ul> </li> </ul> | <b>Lead:</b> Partners <ul style="list-style-type: none"> <li>Developers</li> <li>MHC owners and experts</li> <li>Nonprofit providers</li> </ul>   | \$\$<br> |

\*A Relocation Assistance Package would include some combination of the strategies included under above.

★ = policy or funding decision required by elected body

\$ = level of financial resources needed collectively

## County-Wide Manufactured Homes Strategy Action Plan



= level of staff resources needed collectively

### Dedicated Resources:

#### Affordable Housing Land Banking (Orange County Capital Investment Plan)

The land banking fund was established during the FY2015-16 budget process to enable acquisition of manufactured home parks and other property for future affordable housing development. The fund has approximately \$1 million currently available.

#### Displacement Mitigation Assistance Program (Orange County)

The Displacement Mitigation Assistance Program (D-MAP) provides direct assistance to low- and- moderate-income manufactured housing residents facing displacement caused by manufactured home park closure, redevelopment or natural disaster. EmPOWERment, Inc. works with Orange County to coordinate relocation services for D-MAP. Currently, the D-MAP-budget has approximately \$53,000 available.

### Potential Resources:

#### Carrboro

##### AFFORDABLE HOUSING SPECIAL REVENUE FUND

The goal of the Affordable Housing Special Revenue Fund is to advance the Town's goal of increasing and improving the stock of affordable housing within Carrboro and its planning jurisdiction. Special Revenue Funds may be used for land banking, construction, acquisition, pre-development costs, repair, rehabilitation, and other home preservation activities. The Town Council has approved a penny and a half property tax allocation, approximately \$337,500, which is a dedicated annual revenue source for affordable housing. For more information on the Affordable Housing Special Revenue Fund, visit the [Town's website](#).

#### Chapel Hill

##### AFFORDABLE HOUSING FUND (AHF)

In 2002, the Town Council established the AHF to preserve owner-occupied housing in Chapel Hill for affordable housing purposes.

**Eligible Uses:** The AHF has a variety of eligible uses, including:

## County-Wide Manufactured Homes Strategy Action Plan

1. Preservation of owner-occupied housing
2. Land acquisition
3. Renovation
4. Affordable housing construction
5. Rental and utility assistance

For more information on the Affordable Housing Fund, visit the [Town's website](#).

### **AFFORDABLE HOUSING DEVELOPMENT RESERVE (AHDR)**

In fiscal year 2014-15, the Town Council allocated over \$688,000 for affordable housing and approved an allocation strategy for this funding, establishing an Affordable Housing Development Reserve (AHDR).

**Eligible Uses:** The AHDR is dedicated exclusively to the development and preservation of affordable housing. Priority project areas are:

1. Land bank and land acquisition
2. Rental subsidy and development
3. Homeownership development and assistance
4. Future development planning.

For more information on the Affordable Housing Development Reserve, visit the [Town's website](#).

### **COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM (CDBG)**

The CDBG Program was created by the U.S. Congress in 1974 and is administered by the Department of Housing and Urban Development (HUD). The primary objective of the program is to develop viable urban communities by providing decent housing and a suitable living environment and expanding economic opportunities for low- and moderate-income peoples.

**Eligible Uses:** [CDBG eligible activities](#) include, but are not limited to:

1. Acquisition of Real Property
2. Relocation and Demolition
3. Rehabilitation
4. Public Facilities and Improvements, and Public Services.

For more information about the CDBG program, visit the [Federal CDBG website](#) and the [Town website](#).

## County-Wide Manufactured Homes Strategy Action Plan

### Orange County

#### **Urgent Repair Program**

Orange County administers the Urgent Repair Program (URP) to finance emergency and critical repairs and accessibility modifications for low-income homeowners. Up to 20% of the total housing units repaired or modified may be manufactured housing units that are owned and occupied by eligible homeowners on rented lots. The North Carolina Housing Finance Agency awarded Orange County \$100,000 in program funds and the County committed \$40,000 in local funds for the 2021 program cycle. Funds for the 2020 cycle have all been expended.

#### **HOME Investment Partnerships Program**

The HOME Investment Partnerships Program is the largest federal block grant program dedicated to increasing the availability of affordable housing for low-income households. HOME provides flexible financing to states and localities (called “participating jurisdictions”) to use for affordable housing activities that fall into four main categories: rehabilitation of owner-occupied housing; assistance to homebuyers; acquisition, rehabilitation or construction of rental housing; and tenant-based rental assistance. HOME funds may be used to purchase and/or rehabilitate manufactured homes, provided that the owner is low-income and owns the land beneath the manufactured home. The U.S. Department of Housing and Urban Development (HUD) awarded Orange County about \$379,000 in HOME for 2021. In addition, the Towns and the County collectively contribute local matching funds to the program, in an amount equal to 25% of HOME funds to be used for affordable housing activities.

## County-Wide Manufactured Homes Strategy Action Plan

### Eligible Funding Sources Overview:

|    | Strategy  | Orange County |                         |               |      | Chapel Hill |      |      |      | Carrboro |
|----|---|---------------|-------------------------|---------------|------|-------------|------|------|------|----------|
|    |   | CIP           | Displacement Mitigation | Urgent Repair | HOME | AHF         | AHDR | CDBG | BOND | AHSRF    |
| 1a | Support efforts to create resident-owned communities (ROCs)           | ✓             |                         |               | ✓    | ✓           | ✓    | ✓    | ✓    | ✓        |
| 1b | Pursue acquisition opportunities of manufactured home communities     | ✓             |                         |               | ✓    | ✓           | ✓    | ✓    | ✓    | ✓        |
| 1d | Work with manufactured home owners to improve park quality            | ✓             |                         |               | ✓    | ✓           | ✓    | ✓    | ✓    |          |
| 1e | Rehab and repair homes in MHPs  | ✓             |                         | ✓             | ✓    | ✓           | ✓    | ✓    | ✓    | ✓        |
| 2a | Pursue onsite and off-site home construction as part of redevelopment | ✓             |                         |               | ✓    | ✓           | ✓    |      | ✓    | ✓        |
| 3b | Use publicly owned land to create relocation opportunities            | ✓             |                         |               | ✓    | ✓           | ✓    |      | ✓    | ✓        |
| 3e | Provide financial assistance to relocate homes                        | ✓             | ✓                       |               | ✓    | ✓           | ✓    |      |      |          |
| 3f | Provide financial assistance for residents to secure new housing      | ✓             | ✓                       |               | ✓    | ✓           |      |      |      | ✓        |

### Partners: Community Organizations

*The MHP Implementation Team will partner with these community organizations to carry out the Action Plan. We anticipate that additional partners will be identified as we implement the Action Plan.*

**Banks & Lending Institutions:** There are several local, statewide, and national banks in Chapel Hill. Several partners include: [BB&T](#), [State Employees Credit Union](#), [Latino Credit Union](#) and more.

**Carolina Common Enterprise (CCE):** CCE is a nonprofit focusing on co-ops that address unemployment, poverty and other issues struggling small, rural and urban communities face across the Southeast, including manufactured homes. CCE is an affiliate of ROC USA.

## County-Wide Manufactured Homes Strategy Action Plan

**Chapel Hill Carrboro City Schools** (CHCCS): The local school system. CHCCS has several initiatives related to immigrant and refugees, including the [CHCCS Newcomer Program](#) and the [Social Justice Academy](#) at East Chapel Hill High School.

**CHICLE Language Institute**: CHICLE offers translation and interpreting services in many languages. They also offer language classes.

**Community Home Trust**: A local nonprofit organization that strengthens the Chapel Hill community with permanently affordable housing opportunities.

**El Centro Hispano**: A regional nonprofit organization that works to strengthen the community, build bridges and advocate for equity and inclusion for Hispanics/Latinos in the Triangle Area of North Carolina.

**El Pueblo, Inc.**: A local nonprofit organization that supports the Latinx community.

**EmPOWERment, Inc.**: A local nonprofit with work focusing on affordable living options, education, home ownership, community building, and grassroots economic development.

**Faith Communities**: There are several churches in the Chapel Hill community that serve immigrant and refugee residents. BIC has worked closely and will continue partnering with [St. Thomas More Catholic Church](#), which serves many Latinx residents.

**Family Success Alliance** (FSA): A collective impact initiative, FSA partners with low-income families to ensure families have the skills and tools needed for their children to feel successful and be successful.

**Habitat for Humanity**: A national and international nonprofit organization, with an affiliate in Orange County, NC, that helps families in need build and own quality affordable homes.

**Legal Aid of North Carolina**: A statewide, nonprofit law firm that provides free legal services in civil matters to low-income people in order to ensure equal access to justice and to remove legal barriers to economic opportunity.

**Orange County Affordable Housing Coalition** (OCAHC): A coalition of individuals and organizations working together to provide housing opportunities for all in Orange County, NC. Members include: CASA, Community Empowerment Fund, Community Home Trust, DHIC, EmPOWERment, Inc., Habitat for Humanity of Orange County, Inter-Faith Council for Social Service, Justice United, Marian Cheek Jackson Center for Saving and Making History, Self-Help Credit Union, UNC Partnerships in Aging Program, Weaver Community Housing Association, Family Success Alliance, Triangle J Council of Governments, Orange County Partnership to End Homelessness, and representatives from the Towns of Carrboro, Hillsborough, Chapel Hill and the Orange County government.

## County-Wide Manufactured Homes Strategy Action Plan

**Orange County Home Preservation Coalition**: A collaborative of organizations that provide home repairs and modifications to Orange County residents. The Preservation Coalition seeks to increase communication and collaboration among organizations to decrease burden on clients and service seekers, many of whom are older adults.

**Prosperity Now**: For over 15 years, Prosperity Now has been the central partner in the work to promote manufactured housing as a safe, stable, and affordable path to homeownership and wealth creation for low- and moderate-income residents

**Refugee Community Partnership** (RCP): A local nonprofit, community-driven organization that aims to build unique, holistic, and comprehensive support infrastructure for relocated families.

**ROC USA**: ROC USA is a nonprofit social venture whose mission is to make quality resident ownership viable nationwide and to expand economic opportunities for homeowners in manufactured home communities.

**tilde**: A local language justice cooperative, tilde creates a sustainable livelihood for language workers, and advances language justice by providing high-quality interpreting, translation, training, and consulting in the North Carolina Triangle region and beyond.

**University of North Carolina School of Government**: As the largest university-based local government training, advisory, and research organization in the United States, the School of Government serves more than 12,000 public officials each year.

## Partners: Local Government Departments

*Many departments will be involved in the implementation of the Action Plan. The departments listed below are expected to be key partners in the Action Plan.*

**Housing and Community Departments**: The Orange County Housing and Community Development, Town of Chapel Hill Housing and Community, Town of Carrboro Housing and Community Services departments, and the Hillsborough Planning and Economic Development division are anticipated to play a primary role in implementing the Action Plan.

**Planning Departments**: Planning Departments will assist with land use and zoning related matters.

**Geographic and Information Systems (GIS)**: GIS departments will assist in data visualization and mapping.

## County-Wide Manufactured Homes Strategy Action Plan

### Partners: State Organizations

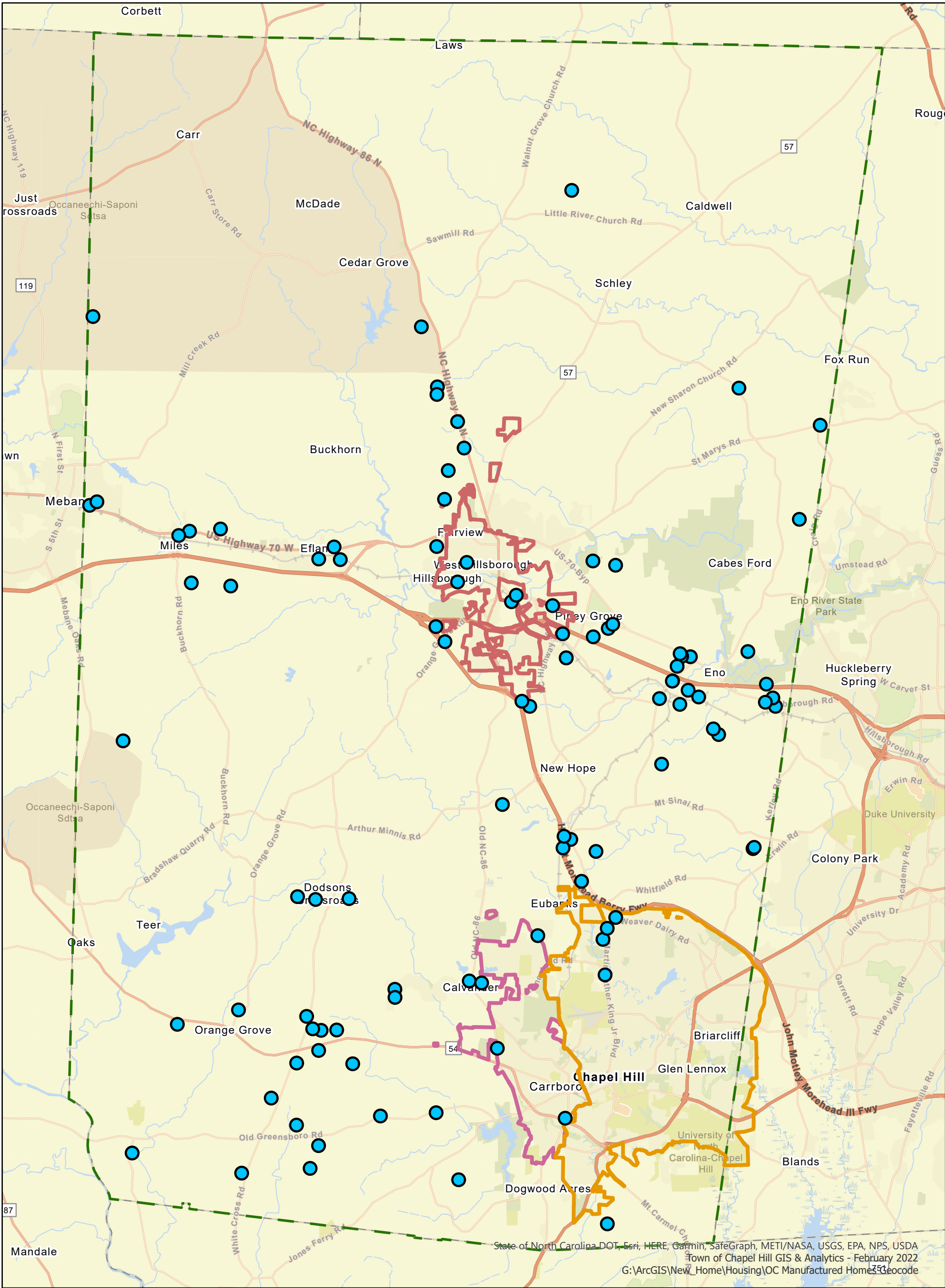
**North Carolina Housing Finance Agency:** NCHFA's Mission is to create affordable housing opportunities for North Carolinians whose needs are not met by the market.

**North Carolina Affordable Housing Coalition:** The North Carolina Affordable Housing Coalition has been leading a movement to ensure that every North Carolinian has a home in which to live with dignity and opportunity.

**North Carolina Department of Environmental Quality:** The NC Department of Environmental Quality's Weatherization Assistance Program helps low-income North Carolinians save energy, reduce their utility bills, and stay safe in their homes.



# Manufactured Home Communities in Orange County, NC



- Legend**
- Manufactured Home Communities  
(100 communities, 2,017 units total)
  - Orange County Boundary
  - Chapel Hill Corporate Limits
  - Carrboro Corporate Limits
  - Hillsborough Town Limits





# TOWN OF CHAPEL HILL

Town Hall  
405 Martin Luther King Jr.  
Boulevard  
Chapel Hill, NC 27514

## Item Overview

**Item #:** 5., **File #:** [22-0344], **Version:** 1

**Meeting Date:** 4/27/2022

### **Call a Public Hearing to Consider a Request to Close a Portion of an Unmaintained and Unimproved Public Right-of-Way of Stinson Street on June 8, 2022.**

#### **Staff:**

Lance Norris, Director

Chris Roberts, Manager of Engineering and Infrastructure

#### **Department:**

Public Works

**Overview:** At the north-east corner of Stinson Street, there is a driveway in-between two parcels owned by Lawler Development Group, LLC. That driveway is within a public right-of-way that the owner is requesting to be closed. The subject right-of-way is approximately 70 feet long by 26 feet wide.

North Carolina General Statute Sec. 160A-299 sets the process for closing public rights-of-way, requiring the Council to adopt a resolution declaring its intent to close the public right-of-way and to call a public hearing. The resolution will be published once a week for four successive weeks before the hearing. A notice of the closing and public hearing will be posted in a least two places along the right-of-way.



#### **Recommendation(s):**

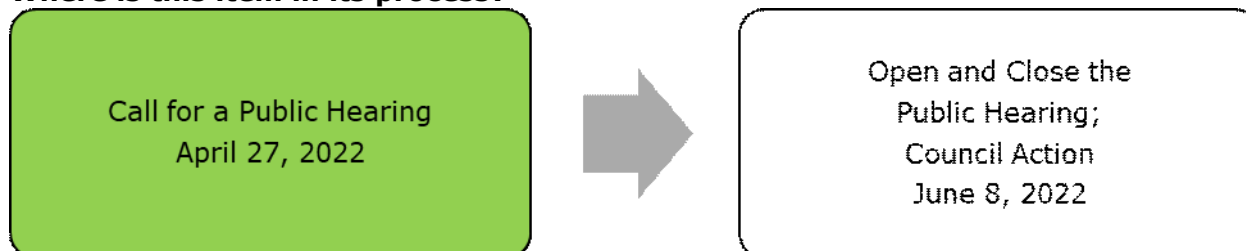
That the Council adopt the resolution to call a Public Hearing to consider a request to close a portion of an unmaintained and unimproved public right-of-way of Stinson Street on June 8, 2022.

**Fiscal Impact/Resources:** Closing of this right-of-way does not create costs to the Town since it was not being maintained.

#### **Key Issues:**

- Lawler Development Group, LLC, requested this right-of-way closure.
- Lawler Development Group, LLC own both of the properties next to the subject public right-of-way and they are the only fronting property owners.

#### **Where is this item in its process?**



**Attachments:**

- Resolution
- Closure Request Letter from Bagwell Holt Smith P.A., legal representative of the Lawlers
- Maps of Stinson Street Requested Closure
  - NC Statute 160A-299

**A RESOLUTION CALLING A PUBLIC HEARING TO CONSIDER A REQUEST TO CLOSE A PORTION OF AN UNMAINTAINED AND UNIMPROVED PUBLIC RIGHT-OF-WAY OF STINSON STREET (2022-04-27/R-3)**

WHEREAS, the Town of Chapel Hill has received a request, from Bagwell Holt Smith P.A., (representing Lawler Development Group, LLC) to close a portion of the unmaintained and unimproved Stinson Street public right-of-way; and

WHEREAS, the requested public right-of-way is at the north-east corner of Stinson Street and is approximately 70 feet long by 26 feet wide; and

WHEREAS, Lawler Development Group, LLC owns the only 2 fronting properties surrounding the subject public right-of-way.

NOW, THEREFORE, BE IT RESOLVED by the Council of the Town of Chapel Hill that the Council hereby declares its intent to consider closing a portion of the unmaintained and unimproved Stinson Street public right-of-way, contingent upon dedication of an access easement.

BE IT FURTHER RESOLVED that the Council calls a Public Hearing at 7:00 pm on Wednesday, June 8, 2022 in the Council Chamber at Town Hall, 405 Martin Luther King Junior Boulevard, Chapel Hill, North Carolina to receive public comment on the proposed closure of said right-of-way and hereby authorizes the Town Manager to arrange publication, posting, and mailing of notices of the Public Hearing as required by law.

This the 27th day of April 2022.

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**The Agenda will reflect the text below and/or the motion text will be used during the meeting.**

By adopting the resolution, the Council calls a Public Hearing to consider closing a portion of the unmaintained and unimproved Stinson Street public right-of-way on June 8<sup>th</sup>, 2022.

BAGWELL HOLT SMITH P.A.  
ATTORNEYS AT LAW  
111 CLOISTER COURT, SUITE 200  
CHAPEL HILL, NORTH CAROLINA 27514  
TELEPHONE: (919) 401-0062  
FACSIMILE: (919) 403-0063  
www.bhspa.com

March 30, 2022

Mr. Chris Roberts, PE  
Manager of Engineering & Infrastructure  
Town of Chapel Hill Public Works Department  
6850 Millhouse Road  
Chapel Hill, NC 27514-5705  
[croberts@townofchapelhill.org](mailto:croberts@townofchapelhill.org)

**RE: Stinson Street – Formal Road Closure Request via NCGS § 160A-299**

Chris:

Daniel Lawler and his mother, Leslie Lawler, of Lawler Development Group LLC have contacted our firm to conduct a title search on 2 tracts they own located on Stinson Street (Orange County PIN #'s 9788-29-9778 and 9788-39-1558). During the scope of the title search, it was discovered that a small portion of the existing right-of-way of Stinson Street that is adjacent to these two parcels needs to be formally abandoned by the Town of Chapel Hill. I am contacting you to formally initiate the permanent road closure process with the Town Council per NCGS § 160A-299.

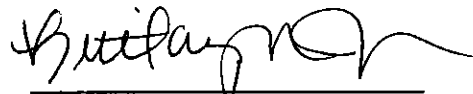
To support this request, I have attached a map showing the portion of Stinson Street to be permanently closed.

My understanding is that the permanent road closure process begins with your office requesting a slot on the agenda at a Town Council meeting, which will lead to a public hearing on the matter. The Lawler's are hopeful this matter can be discussed at the next available Town Council meeting and be scheduled for public hearing shortly thereafter.

Thanks for your assistance and please let me know if you need anything further.

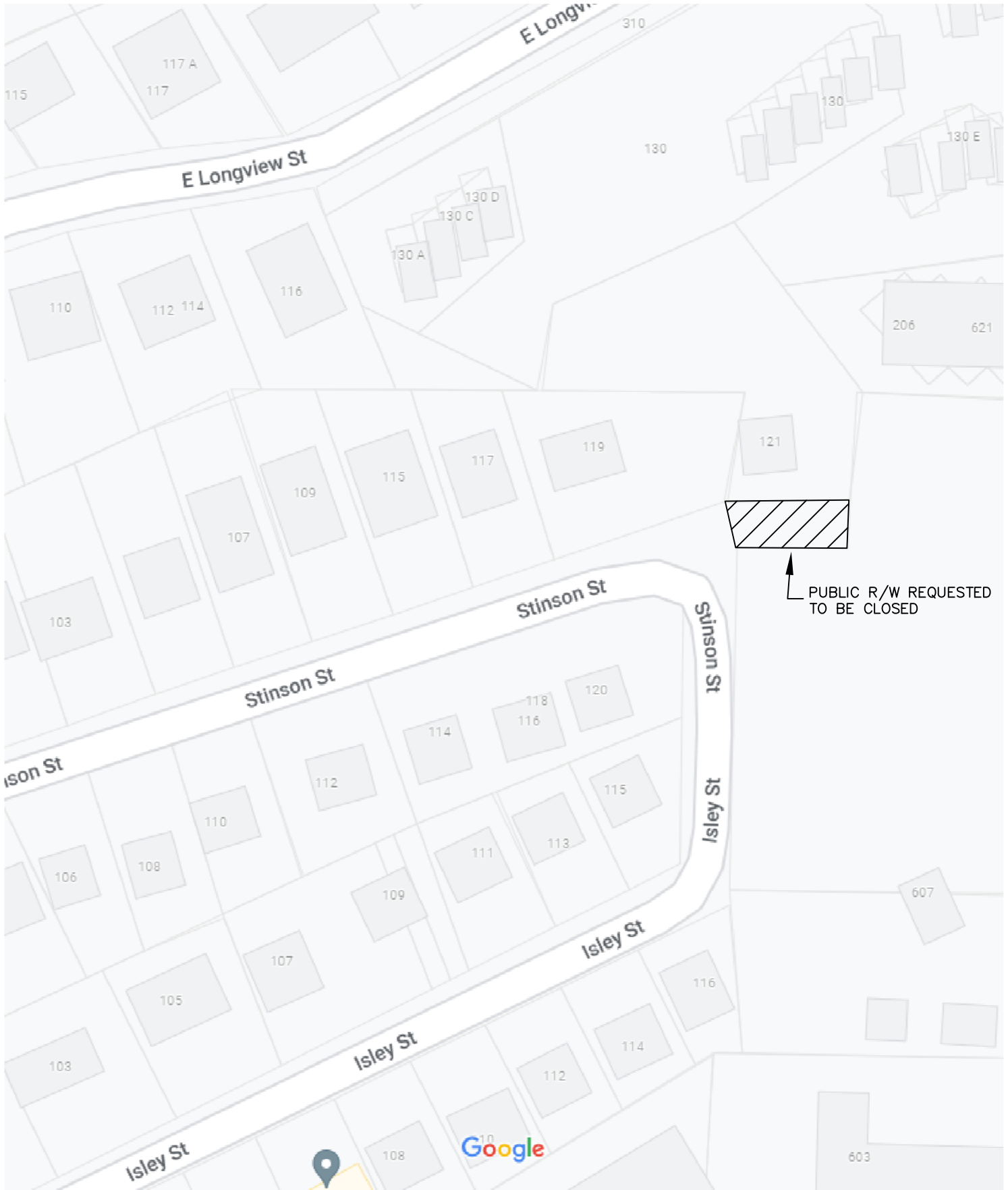
Sincerely,

BAGWELL HOLT SMITH P.A.



Brittany N. Jones, Attorney

Lawler Dev  
PIN: 9788-39-1558





**§ 160A-299. Procedure for permanently closing streets and alleys.**

(a) When a city proposes to permanently close any street or public alley, the council shall first adopt a resolution declaring its intent to close the street or alley and calling a public hearing on the question. The resolution shall be published once a week for four successive weeks prior to the hearing, a copy thereof shall be sent by registered or certified mail to all owners of property adjoining the street or alley as shown on the county tax records, and a notice of the closing and public hearing shall be prominently posted in at least two places along the street or alley. If the street or alley is under the authority and control of the Department of Transportation, a copy of the resolution shall be mailed to the Department of Transportation. At the hearing, any person may be heard on the question of whether or not the closing would be detrimental to the public interest, or the property rights of any individual. If it appears to the satisfaction of the council after the hearing that closing the street or alley is not contrary to the public interest, and that no individual owning property in the vicinity of the street or alley or in the subdivision in which it is located would thereby be deprived of reasonable means of ingress and egress to his property, the council may adopt an order closing the street or alley. A certified copy of the order (or judgment of the court) shall be filed in the office of the register of deeds of the county in which the street, or any portion thereof, is located.

(b) Any person aggrieved by the closing of any street or alley including the Department of Transportation if the street or alley is under its authority and control, may appeal the council's order to the General Court of Justice within 30 days after its adoption. In appeals of streets closed under this section, all facts and issues shall be heard and decided by a judge sitting without a jury. In addition to determining whether procedural requirements were complied with, the court shall determine whether, on the record as presented to the city council, the council's decision to close the street was in accordance with the statutory standards of subsection (a) of this section and any other applicable requirements of local law or ordinance.

No cause of action or defense founded upon the invalidity of any proceedings taken in closing any street or alley may be asserted, nor shall the validity of the order be open to question in any court upon any ground whatever, except in an action or proceeding begun within 30 days after the order is adopted. The failure to send notice by registered or certified mail shall not invalidate any ordinance adopted prior to January 1, 1989.

(c) Upon the closing of a street or alley in accordance with this section, subject to the provisions of subsection (f) of this section, all right, title, and interest in the right-of-way shall be conclusively presumed to be vested in those persons owning lots or parcels of land adjacent to the street or alley, and the title of such adjoining landowners, for the width of the abutting land owned by them, shall extend to the centerline of the street or alley.

The provisions of this subsection regarding division of right-of-way in street or alley closings may be altered as to a particular street or alley closing by the assent of all property owners taking title to a closed street or alley by the filing of a plat which shows the street or alley closing and the portion of the closed street or alley to be taken by each such owner. The plat shall be signed by each property owner who, under this section, has an ownership right in the closed street or alley.

(d) This section shall apply to any street or public alley within a city or its extraterritorial jurisdiction that has been irrevocably dedicated to the public, without regard to whether it has actually been opened. This section also applies to unopened streets or public alleys that are shown on plats but that have not been accepted or maintained by the city, provided that this section shall not abrogate the rights of a dedicator, or those claiming under a dedicator, pursuant to G.S. 136-96.

(e) No street or alley under the control of the Department of Transportation may be closed unless the Department of Transportation consents thereto.



(f) A city may reserve a right, title, and interest in any improvements or easements within a street closed pursuant to this section. An easement under this subsection shall include utility, drainage, pedestrian, landscaping, conservation, or other easements considered by the city to be in the public interest. The reservation of an easement under this subsection shall be stated in the order of closing. The reservation also extends to utility improvements or easements owned by private utilities which at the time of the street closing have a utility agreement or franchise with the city.

(g) The city may retain utility easements, both public and private, in cases of streets withdrawn under G.S. 136-96. To retain such easements, the city council shall, after public hearing, approve a "declaration of retention of utility easements" specifically describing such easements. Notice by certified or registered mail shall be provided to the party withdrawing the street from dedication under G.S. 136-96 at least five days prior to the hearing. The declaration must be passed prior to filing of any plat or map or declaration of withdrawal with the register of deeds. Any property owner filing such plats, maps, or declarations shall include the city declaration with the declaration of withdrawal and shall show the utilities retained on any map or plat showing the withdrawal. (1971, c. 698, s. 1; 1973, c. 426, s. 47; c. 507, s. 5; 1977, c. 464, s. 34, 1981, c. 401; c. 402, ss. 1, 2; 1989, c. 254; 1993, c. 149, s. 1; 2015-103, s. 1.)



# TOWN OF CHAPEL HILL

Town Hall  
405 Martin Luther King Jr.  
Boulevard  
Chapel Hill, NC 27514

## Item Overview

**Item #:** 6., **File #:** [22-0345], **Version:** 1

**Meeting Date:** 4/27/2022

### Amend the 2021-22 Council Calendar.

#### Staff:

Sabrina Oliver, Director  
Amy Harvey, Deputy Town Clerk

#### Department:

Communications and Public Affairs

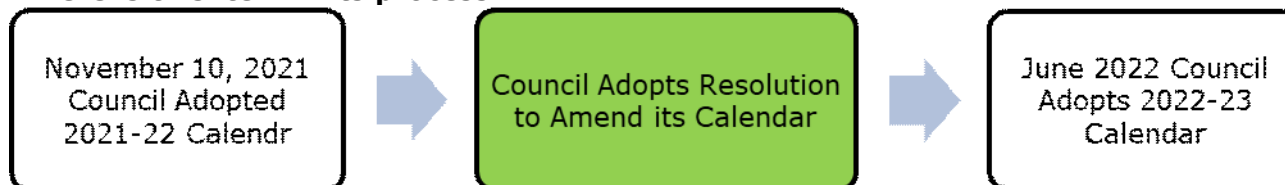
**Overview:** The Council adopted its 2021-22 meeting calendar on November 10, 2021. This action amends the Council calendar to incorporate the Special Meeting for the Legislative Breakfast.



#### Recommendation(s):

That the Council adopt a resolution amending the 2021-22 Council calendar to incorporate scheduling changes.

#### Where is this item in its process?



#### Attachments:

- Resolution
- Proposed Chapel Hill Town Council 2021-22 Meeting Calendar

**A RESOLUTION AMENDING THE COUNCIL'S 2021-22 MEETING CALENDAR (2022-04-27/R-4)**

WHEREAS, on November 11, 2021, the Council adopted its 2021-22 meeting calendar; and

WHEREAS, the Council holds a yearly meeting with the State Legislative representatives from Orange County; and

NOW, THEREFORE, BE IT RESOLVED by the Council of the Town of Chapel Hill that the Council amends its 2021-22 meeting calendar to add the following meetings:

- May 19, 2022, Council Legislative Meeting at 8:30 a.m. in the Room B, Chapel Hill Public Library, 100 Library Drive, Chapel Hill, NC 27514

This the 27<sup>th</sup> day of April 2022.

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**The Agenda will reflect the text below and/or the motion text will be used during the meeting.**

By adopting the resolution, the Council amends the 2021-21 Council calendar to schedule a meeting with the State Legislative representatives from Orange County on May 19.

## Adopted Chapel Hill Town Council 2021 Meeting Calendar

| JULY    |    |    |    |    |    |    | AUGUST   |    |    |    |    |    |    | SEPTEMBER |    |    |    |    |    |    |
|---------|----|----|----|----|----|----|----------|----|----|----|----|----|----|-----------|----|----|----|----|----|----|
| S       | M  | T  | W  | T  | F  | S  | S        | M  | T  | W  | T  | F  | S  | S         | M  | T  | W  | T  | F  | S  |
|         |    |    |    | 1  | 2  | 3  | 1        | 2  | 3  | 4  | 5  | 6  | 7  |           |    |    | 1  | 2  | 3  | 4  |
| 4       | 5  | 6  | 7  | 8  | 9  | 10 | 8        | 9  | 10 | 11 | 12 | 13 | 14 | 5         | 6  | 7  | 8  | 9  | 10 | 11 |
| 11      | 12 | 13 | 14 | 15 | 16 | 17 | 15       | 16 | 17 | 18 | 19 | 20 | 21 | 12        | 13 | 14 | 15 | 16 | 17 | 18 |
| 18      | 19 | 20 | 21 | 22 | 23 | 24 | 22       | 23 | 24 | 25 | 26 | 27 | 28 | 19        | 20 | 21 | 22 | 23 | 24 | 25 |
| 25      | 26 | 27 | 28 | 29 | 30 | 31 | 29       | 30 | 31 |    |    |    |    | 26        | 27 | 28 | 29 | 30 |    |    |
| OCTOBER |    |    |    |    |    |    | NOVEMBER |    |    |    |    |    |    | DECEMBER  |    |    |    |    |    |    |
| S       | M  | T  | W  | T  | F  | S  | S        | M  | T  | W  | T  | F  | S  | S         | M  | T  | W  | T  | F  | S  |
|         |    |    |    |    | 1  | 2  |          | 1  | 2  | 3  | 4  | 5  | 6  |           |    |    | 1  | 2  | 3  | 4  |
| 3       | 4  | 5  | 6  | 7  | 8  | 9  | 7        | 8  | 9  | 10 | 11 | 12 | 13 | 5         | 6  | 7  | 8  | 9  | 10 | 11 |
| 10      | 11 | 12 | 13 | 14 | 15 | 16 | 14       | 15 | 16 | 17 | 18 | 19 | 20 | 12        | 13 | 14 | 15 | 16 | 17 | 18 |
| 17      | 18 | 19 | 20 | 21 | 22 | 23 | 21       | 22 | 23 | 24 | 25 | 26 | 27 | 19        | 20 | 21 | 22 | 23 | 24 | 25 |
| 24      | 25 | 26 | 27 | 28 | 29 | 30 | 28       | 29 | 30 |    |    |    |    | 26        | 27 | 28 | 29 | 30 | 31 |    |
| 31      |    |    |    |    |    |    |          |    |    |    |    |    |    |           |    |    |    |    |    |    |

## Proposed 2022 Meeting Calendar

| JANUARY |    |    |    |    |    |    | FEBRUARY |    |    |    |    |    |    | MARCH |    |    |    |    |    |    |
|---------|----|----|----|----|----|----|----------|----|----|----|----|----|----|-------|----|----|----|----|----|----|
| S       | M  | T  | W  | T  | F  | S  | S        | M  | T  | W  | T  | F  | S  | S     | M  | T  | W  | T  | F  | S  |
|         |    |    |    |    |    | 1  |          |    | 1  | 2  | 3  | 4  | 5  |       |    | 1  | 2  | 3  | 4  | 5  |
| 2       | 3  | 4  | 5  | 6  | 7  | 8  | 6        | 7  | 8  | 9  | 10 | 11 | 12 | 6     | 7  | 8  | 9  | 10 | 11 | 12 |
| 9       | 10 | 11 | 12 | 13 | 14 | 15 | 13       | 14 | 15 | 16 | 17 | 18 | 19 | 13    | 14 | 15 | 16 | 17 | 18 | 19 |
| 16      | 17 | 18 | 19 | 20 | 21 | 22 | 20       | 21 | 22 | 23 | 24 | 25 | 26 | 20    | 21 | 22 | 23 | 24 | 25 | 26 |
| 23      | 24 | 25 | 26 | 27 | 28 | 29 | 27       | 28 |    |    |    |    |    | 27    | 28 | 29 | 30 | 31 |    |    |
| 30      | 31 |    |    |    |    |    |          |    |    |    |    |    |    |       |    |    |    |    |    |    |
| APRIL   |    |    |    |    |    |    | MAY      |    |    |    |    |    |    | JUNE  |    |    |    |    |    |    |
| S       | M  | T  | W  | T  | F  | S  | S        | M  | T  | W  | T  | F  | S  | S     | M  | T  | W  | T  | F  | S  |
|         |    |    |    |    | 1  | 2  | 1        | 2  | 3  | 4  | 5  | 6  | 7  |       |    |    | 1  | 2  | 3  | 4  |
| 3       | 4  | 5  | 6  | 7  | 8  | 9  | 8        | 9  | 10 | 11 | 12 | 13 | 14 | 5     | 6  | 7  | 8  | 9  | 10 | 11 |
| 10      | 11 | 12 | 13 | 14 | 15 | 16 | 15       | 16 | 17 | 18 | 19 | 20 | 21 | 12    | 13 | 14 | 15 | 16 | 17 | 18 |
| 17      | 18 | 19 | 20 | 21 | 22 | 23 | 22       | 23 | 24 | 25 | 26 | 27 | 28 | 19    | 20 | 21 | 22 | 23 | 24 | 25 |
| 24      | 25 | 26 | 27 | 28 | 29 | 30 | 29       | 30 | 31 |    |    |    |    | 26    | 27 | 28 | 29 | 30 |    |    |
|         |    |    |    |    |    |    |          |    |    |    |    |    |    |       |    |    |    |    |    |    |

|    |                                      |    |  |    |  |
|----|--------------------------------------|----|--|----|--|
| 18 | Regular Meetings<br>7 PM @ Town Hall | 6  | Council Work Sessions<br>6:30 PM @ Library | 11 | Other Meetings<br>*Check web calendar<br>for time/location |
| 35 | Total Number of Meetings             | 12 | Town Holidays                              | 10 | CCES Meetings**  |

## List of Meetings by Date

### August 2021<sup>1</sup>

- 25-W-Special Meeting<sup>2</sup>, 7 PM
- 30-M-Special Meeting, 7 PM

### September 2021

- 1-W-Regular Meeting
- 22-W-Regular Meeting with Closed Session
- 29-W-Work Session

### October 2021

- 13-W-Regular Meeting
- 20-W-Special Meeting<sup>2</sup>
- 20-W-Work Session
- 27-W-Regular Meeting

### November 2021

- 10-W-Regular Meeting with Closed Session
- 17-W-Regular Meeting

### December 2021

- 1-W-Regular Meeting, Work Session with Closed Session
- 8-W-Organizational Meeting

### January 2022

- 5-W-Work Session
- 12-W-Regular Meeting
- 25-T-Assembly of Governments, time/location TBD
- 26-W-Regular Meeting

### February 2022

- 2-W-Work Session
- 9-W-Regular Meeting
- 18-F-Council Retreat, 3:30 p.m. /location TBD
- 23-W-Regular Meeting

### March 2022

- 2-W-Work Session
- 9-W-Regular Meeting
- 16-W-Council Retreat, 4 PM, Rizzo Center
- 23-W-Regular Meeting

### April 2022

- 6-W-Regular Meeting
- 13-W-Work Session
- 25-M-Special Meeting<sup>2</sup>
- 27-W-Regular Meeting

### May 2022

- 4-W-Regular Meeting
- 11-W- Work Session
- 18-W- Regular Meeting
- 19-TH-Legislative Breakfast, 8:30 AM, Library Room B
- 25-W- Budget Work Session (*Tentative*)

### June 2022

- 1-W-Budget Work Session (*Tentative*)
- 8-Regular Meeting
- 15-Regular Meeting

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## \*\*Council Committee on Economic Sustainability

Meets monthly on the first Friday at 8 AM, unless otherwise indicated. These are held virtually, see [web calendar](#) for details. When the Committee returns to physical meetings the Council Committee on Economic Sustainability meetings are held at the Chapel Hill Public Library, Meeting Room B, (100 Library Drive, Chapel Hill, NC 27514) For more Committee information, see <https://www.townofchapelhill.org/government/departments-services/economic-development/council-economic-sustainability-committee>

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<sup>1</sup> Unless otherwise noted, Council Regular and Organizational meetings start at 7:00 p.m. and Council Work Sessions start at 6:30 p.m. both are held virtually, see web calendar (<https://www.townofchapelhill.org/government/newsroom/calendar>) for details. When Council returns to physical meetings Council Regular and Organizational meetings are held in the Chapel Hill Town Hall, Council Chamber (405 MLK Jr Blvd, Chapel Hill, NC 27514); Council Work Sessions are held at the Chapel Hill Public Library, Meeting Room B, (100 Library Drive, Chapel Hill, NC 27514)

<sup>2</sup> It is anticipated that the Council will go into closed session, as authorized by North Carolina General Statute Section 143-318.11(a)(6) to discuss a personnel matter.



# TOWN OF CHAPEL HILL

Town Hall  
405 Martin Luther King Jr.  
Boulevard  
Chapel Hill, NC 27514

## Item Overview

**Item #:** 7., **File #:** [22-0346], **Version:** 1

**Meeting Date:** 4/27/2022

### Receive Upcoming Public Hearing Items and Petition Status List.

**Staff:**

Sabrina Oliver, Director and Town Clerk  
Amy Harvey, Deputy Town Clerk

**Department:**

Communications and Public Affairs



**Recommendation(s):**

That the Council accept the reports as presented.

**Background:**

Two pages on our website have been created to track:

- public hearings scheduled for upcoming Council meetings; and
- petitions received, including their status and who you can call for information.

The goal is to provide, in easily available spaces, information that allows people to know when Council will be seeking their comments on a particular topic of development and to know the status of a petition submitted at Council meetings.

In addition to being on the website, these pages will be included in each agenda for Council information,

**Fiscal Impact/Resources:** Staff time was allocated to create the semi-automated web pages, and additional staff time will be needed for maintenance.



**Attachments:**

- Scheduled Public Hearings <<https://www.townofchapelhill.org/government/mayor-and-council/council-minutes-and-videos/scheduled-public-hearings>>
- Status of Petitions to Council <<https://www.townofchapelhill.org/government/mayor-and-council/how-to-submit-a-petition/petition-status>>

**The Agenda will reflect the text below and/or the motion text will be used during the meeting.**

By accepting the report, the Council acknowledges receipt of the Scheduled Public Hearings and Status of Petitions to Council lists.

## SCHEDULED PUBLIC HEARINGS

This webpage lists public hearings that are scheduled for a *specific Council meeting date*, although periodically, some may be continued to a future date. Public hearings may relate to the Land Use Management Ordinance (LUMO), Residential or Commercial Development, Budget, Transportation, or Housing issues. Meeting materials are posted at [Council Meeting Agendas](#), [Minutes](#) and [Videos](#).

Interested in a development project not yet scheduled for Council review? See the [Development Activity Report](#) for the project's current status.

### April 27, 2022

- Close The Legislative Hearing And Consider The Jay Street Apartments, 110 Jay Street: Conditional Zoning Application ([PROJECT 21-087](#))
- Close The Legislative Hearing And Consider The Trinity Court, 751 Trinity Court Conditional Zoning Application ([PROJECT 21-086](#))
- Open The Legislative Hearing: Link Apartments, 101 E Rosemary Street: Conditional Zoning Application ([PROJECT #21-030](#))
- Concept Plan Review: 828 MLK ([Planning Project #22-010](#))

### May 4, 2022

- Presentation: Recommended [Budget](#) for FY 2022-23
- Close the Legislative Hearing and Consider Gattis Court, 307 N Roberson Street: Conditional Zoning Application ([PROJECT #22-001](#))
- Open the Legislative Hearing: Conditional Zoning Application for 107 Johnson Street ([Project #21-072](#)).
- Concept Plan Review: White Oak ([Planning Project #22-013](#))

### May 18

- Open a Public Hearing for [Budget](#) FY 2022-23
- Open a Legislative Hearing: Gimghoul Castle, 742 Gimghoul Road Conditional Zoning Application ([Project 21-044](#))
- Open an Evidentiary Hearing: [Fifth Third Bank - 1800 Fordham Blvd](#)
- Open an Evidentiary Hearing: Harris Teeter Expansion and Fuel Center, 1800 Martin Luther King Jr Blvd Special Use Permit Application ([Project 21-007](#))
- Concept Plan Review: Porthole Alley ([Planning Project #22-009](#))

## STATUS OF PETITIONS TO COUNCIL

Petitions submitted during the Town Council meetings are added to the list below, typically within five business days of the meeting date.

To contact the department responsible, click on the department name. Meeting materials are posted on the [Council Meetings calendar](#).

| <div>Public Initiated</div> <div>Council Initiated</div> <div>Closed</div> |  |   |   |   |
|--|--|---|---|---|
| Meeting Date   | Petitioner                               | Petition Request  | Departments Responsible   | Petition Status   |
| 04/06/2022   | Robert Beasley                           | <a href="#">Petition to Extend the N Route to Carr Mill Mall</a>  | Transit<br><a href="#">Brian Litchfield</a> ,<br>Transit Director<br>Phone: 919-969-4908                            | Staff will follow up through the Transit Partners Committee and share their recommendation following the 05/24/22 meeting.  |
| 03/09/2022   | Steve Moore                              | <a href="#">Request for Protection of Old Chapel Hill Cemetery</a>  | Parks & Recreation<br><a href="#">Phillip Fleischmann</a> ,<br>Parks and Recreation Director<br>Phone: 919-968-2785 | Staff is preparing information to respond to this request.  |
| 03/09/2022   | Wayne Pein                               | <a href="#">Request to Reconstruct Estes Drive with Alternate Bicycle Facilities</a>                                      | Planning & Development Services   | Staff is preparing information to respond to this request.  |
| 02/23/2022   | Wayne Pein                               | <a href="#">Request to Overhaul the Door Zone Bike Lane on Country Club Road and Correctly Place Shared Lane Markings</a> | Planning & Development Services<br>Bike Ped Team  | Staff is preparing information to respond to this request.  |
| 02/09/2022   | Tab Combs                                | <a href="#">Tab Combs Request Anti-dooring Ordinance</a>  | Planning & Development Services   | The Council will consider an ordinance at an upcoming meeting.  |
| 02/09/2022   | Jeffrey Charles                          | <a href="#">Jeffrey Charles Request Homestead Development</a>   | Planning & Development Services   | The Council reviewed a concept plan for this location at their 02/09/22 meeting. The Council has not yet reviewed a formal application for this site.             |
| 01/12/2022   | Burwell Ware                             | <a href="#">Request to Regulate Fast-food Drive-Throughs</a>  | Planning & Development Services   | Staff is preparing information to respond to this request.  |
| 01/12/2022   | Joel Hornstein                           | <a href="#">Request for Underground Electric Lines on East Franklin Street</a>  | Public Works<br><a href="#">Lance Norris</a> ,<br>Public Works Director<br>Phone: 919-969-5100                      | Staff is preparing information to respond to this request.  |
| 01/12/2022   | Environmental Stewardship Advisory Board | <a href="#">Request to Adopt New Electrification Policies for Chapel Hill</a>   | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707             | Staff will seek to incorporate information related to this request in the next Climate Action and Response Plan update to Council, in the first quarter of 2022.. |



| Meeting Date | Petitioner                 | Petition Request   | Departments Responsible   | Petition Status   |
|--------------|----------------------------|--|---|---|
| 11/17/2021   | Will Raymond               | <a href="#">Request Regarding Ethical Rules Guiding Council, Staff and Advisory Board Conduct.</a> | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707<br><br>Mayor<br><a href="#">Pam Hemminger</a> ,<br>Mayor<br>Phone: 919-968-2714 | The Council referred the petition to the Mayor and Manager for follow-up.   |
| 11/17/2021   | Pristine Onvoha            | <a href="#">Request to Prioritize Bolin Creek Restoration.</a>                                     | Public Works<br><a href="#">Lance Norris</a> ,<br>Public Works Director<br>Phone: 919-969-5100<br>Stormwater  | Staff is preparing information to respond to this request.  |
| 10/13/2021   | Tara Kachgal               | <a href="#">Request Regarding 110 Jay Street.</a>  | Housing & Community<br><a href="#">Sarah Vinas</a> ,<br>Interim Director<br>Phone: 919-969-5079   | The Council referred the petition to the Mayor and Manager for follow-up.   |
| 10/13/2021   | Savannah Bowers            | <a href="#">Request Regarding Operational Transparency for Town Government</a>                     | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707<br>Council Committee on Boards and Commissions                                  | Staff is preparing information to respond to this request.  |
| 09/22/2021   | Joan Rehm and Karin Nelson | <a href="#">Request Regarding Downtown Exhaust Noise.</a>  | Police<br><a href="#">Chris Blue</a> ,<br>Police Chief<br>Phone: 919-968-2766   | Staff is preparing information to respond to this request.  |
| 09/22/2021   | Barry Nakell               | <a href="#">Request to Rename Dixie Lane</a>   | Public Works<br><a href="#">Lance Norris</a> ,<br>Public Works Director<br>Phone: 919-969-5100  | Staff will work with the Council to respond to this request.  |
| 09/22/2021   | Makeda Ma'at               | <a href="#">Request Regarding Community Home Trust.</a>  | Housing & Community<br><a href="#">Sarah Vinas</a> ,<br>Interim Director<br>Phone: 919-969-5079   | Staff have spoken with the petitioner and the Community Home Trust Director. The matter has been referred to Carrboro agencies for follow-up. |

| Meeting Date | Petitioner      | Petition Request   | Departments Responsible   | Petition Status   |
|--------------|-----------------|--|---|---|
| 09/22/2021   | Kate Sayre      | <a href="#">Request To Build A Splash Pad in Chapel Hill</a>   | Parks & Recreation<br><a href="#">Phillip Fleischmann</a> ,<br>Parks and Recreation Director<br>Phone: 919-968-2785   | The Council discussed this at their 10/20/2021 work session. Staff will continue to evaluate locations, specifications, and costs for further Council consideration.  |
| 09/01/2021   | Tamra Finn      | <a href="#">Request to Amend Town Code to Permit Golf Cart Use on Neighborhood Streets.</a>  | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707   | Staff has researched regulations in other NC communities and will develop recommendations for a local ordinance for Council to consider.  |
| 09/01/2021   | Joe Patterson   | <a href="#">Request for Modifications to the Town of Chapel Hill Noise Control Code.</a>   | Police<br><a href="#">Chris Blue</a> ,<br>Police Chief<br>Phone: 919-968-2766   | Staff is preparing information to respond to this request.  |
| 06/23/2021   | Molly McConnell | <a href="#">Request Regarding Amending the LUMO to Allow 30 Feet Buffer from Roadway.</a>  | Planning & Development Services   | Staff is preparing information to respond to this request.  |
| 06/23/2021   | Robert Beasley  | <a href="#">Request Regarding Affordable Housing at Trinity Court.</a>   | Housing & Community<br><a href="#">Sarah Vinas</a> ,<br>Interim Director<br>Phone: 919-969-5079   | In 2022, the Town will apply for Low Income Housing Tax Credit. The Council opened a legislative hearing for a conditional zoning application on 03/23/22 and will consider approving the application on 04/27/22.  |
| 06/16/2021   | Pamela Cooper   | <a href="#">Request Regarding Stormwater Study for Jay Street Site.</a>  | Housing & Community<br><a href="#">Sarah Vinas</a> ,<br>Interim Director<br>Phone: 919-969-5079<br><br>Public Works<br><a href="#">Lance Norris</a> ,<br>Public Works Director<br>Phone: 919-969-5100 | The development team created a stormwater management plan once the site plan was finalized. Although not required, the team also presented the plan to the Stormwater Advisory Board in November 2021 before submitting a Conditional Zoning Application. |
| 06/16/2021   | Robert Beasley  | <a href="#">Request Regarding Proposed Jay Street Apartments and Affordable Housing Development on Public Land Planning Process.</a> | Housing & Community<br><a href="#">Sarah Vinas</a> ,<br>Interim Director<br>Phone: 919-969-5079   | Staff continues to work with legal experts to adhere to all relevant statutes. The Council opened a legislative hearing for a conditional zoning application on 03/23/22 and will consider approving the application on 04/27/22.                         |

| Meeting Date | Petitioner        | Petition Request   | Departments Responsible  | Petition Status  |
|--------------|-------------------|--|--|--|
| 06/16/2021   | Rachel Gray       | <a href="#">Request Regarding West Chapel Hill Cemetery.</a>   | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707<br><br>Housing & Community<br><a href="#">Sarah Vinas</a> ,<br>Interim Director<br>Phone: 919-969-5079 | Staff reviewed the 2011 report with its author and does not recommend conducting an investigation of whether there are unmarked or undocumented burials on the 110 Jay Street parcel.  |
| 06/09/2021   | Deborah Fulghieri | <a href="#">Request that Town Staff Bring Forward Historical and Environmental Information for the Town-Owned Property at Mt. Carmel Church Road and Bennett Road.</a> | Housing & Community<br><a href="#">Sarah Vinas</a> ,<br>Interim Director<br>Phone: 919-969-5079  | The Town used open space bond funds to pay closing costs for the land donation. There is no legal conflict with considering alternate uses of a site the Town acquired in this way. Council prioritized the parcel for affordable housing in September 2019. |
| 06/09/2021   | Robert Beasley    | <a href="#">Request Regarding Jay Street Land Tract Development Project Funding.</a>   | Housing & Community<br><a href="#">Sarah Vinas</a> ,<br>Interim Director<br>Phone: 919-969-5079  | 110 Jay Street was one of five parcels purchased in 2005 with open space bond funding. Town Attorneys and outside counsel have advised there is no legal conflict with repurposing the site for affordable housing after this purchase.                      |
| 05/26/2021   | Edson Freeman     | <a href="#">Request to Allow Miniature Pigs as Pets</a>  | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707  | Due to lack of regulations around breeding and containment issues due to pigs' high level of intelligence, staff recommended taking no action on this petition.  |
| 05/26/2021   | Mary Cummings     | <a href="#">Request to Ban Gas-Powered Leaf Blowers</a>  | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707  | Staff is preparing information to respond to this request.   |
| 05/19/2021   | Phil Post         | <a href="#">Request to Refer the April 21 Petition Related to 160D to the Planning Commission.</a>   | Planning & Development Services<br>Planning Commission   | Staff is reviewing this request.   |

| Meeting Date | Petitioner  | Petition Request   | Departments Responsible  | Petition Status  |
|--------------|---|--|--|--|
| 05/19/2021   | Chapel Hill Public Library Advisory Board                                 | <a href="#">Request for a Working Group on Equitable Library Funding.</a>  | Mayor<br><a href="#">Pam Hemminger</a> ,<br>Mayor<br>Phone: 919-968-2714<br><br>Library<br><a href="#">Susan Brown</a> ,<br>Library Director<br>Phone: 919-969-2034<br><br>Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707 | Orange County established a Library Services Task Force with staff and elected officials from both agencies participating. The task force first met in January 2022.   |
| 02/24/2021   | Parks, Greenways, and Recreation Commission                               | <a href="#">Request Regarding Facilities Repair.</a>   | Business Management<br><a href="#">Amy Oland</a> ,<br>Business Management Director<br>Phone: 919-969-5017  | The Council's adopted budget for FY22 included restored pay-go capital funding. The Town made repairs at Ephesus Park in early 2022. The project to replace Cedar Falls tennis courts is underway with construction expected to finish by the end of 2022. |
| 11/04/2020   | Residents in the area of Mason Farm Rd., Whitehead Circle, and Purefoy Rd | <a href="#">Request Improvements to Neighborhood Infrastructure to Promote Safe Walking and Biking and Improved Connectivity to Adjacent Neighborhoods and Campus.</a> | Planning & Development Services<br><br>Public Works<br><a href="#">Lance Norris</a> ,<br>Public Works Director<br>Phone: 919-969-5100  | Staff is preparing information to respond to this request.   |
| 06/10/2020   | Community Design Commission   | <a href="#">Request to Create a Downtown Design District.</a>  | Planning & Development Services  | The Town's partnership with UNC on the Downtown Together initiative will help inform the future of downtown development and the role that design standards may have in achieving Downtown Together objectives.   |
| 05/20/2020   | Parks, Greenways, and Recreation Commission                               | <a href="#">Request to Designate all 36.2 Acres of the American Legion Property for Use as a Community Park.</a>   | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707  | This request will be incorporated into the public engagement process for the future use of the site.   |
| 05/20/2020   | Elaine McVey  | <a href="#">Request to Amend the Land Use Management Ordinance Related to Deer Fencing.</a>  | Planning & Development Services  | Staff will work to bring forward a LUMO Text Amendment for Council consideration at a future date.   |

| Meeting Date | Petitioner  | Petition Request   | Departments Responsible  | Petition Status   |
|--------------|---|--|--|---|
| 02/19/2020   | Steve Moore   | <a href="#">Request Regarding Cemetery Needs.</a>                        | <p>Parks &amp; Recreation<br/> <a href="#">Phillip Fleischmann</a>,<br/> Parks and Recreation Director<br/> Phone: 919-968-2785</p> <p>Communications &amp; Public Affairs<br/> <a href="#">Sabrina Oliver</a>,<br/> Communications &amp; Public Affairs Director<br/> Phone: 919-968-2757</p> | Staff is in contact with the petitioner and is working to respond to the items raised in the petition. The driveways in Old Chapel Hill Cemetery were resurfaced in July 2021.  |
| 01/08/2020   | Renuka Soll   | <a href="#">Request for an Improved Petition Process.</a>                | <p>Town Manager<br/> <a href="#">Ross Tompkins</a>,<br/> Assistant to the Town Manager<br/> Phone: 919-968-2707</p>  | Additional effort is being made to track and update petition status on this website so that the public has access. Petitioners can contact the Mgr.'s office or responding department if they have questions after reviewing updates. |
| 11/20/2019   | John Morris   | <a href="#">Request Regarding Local &amp; Regional Transit Planning.</a> | <p>Transit<br/> <a href="#">Brian Litchfield</a>,<br/> Transit Director<br/> Phone: 919-969-4908</p>   | The Town continues to work with its transit partners and neighboring agencies to keep community goals at the forefront of local transit planning efforts.   |
| 10/02/2019   | Daniel Dunn   | <a href="#">Request Regarding Government Transparency.</a>               | <p>Technology Solutions<br/> <a href="#">Scott Clark</a>,<br/> CIO<br/> Phone: 919-968-2735</p> <p>Communications &amp; Public Affairs<br/> <a href="#">Sabrina Oliver</a>,<br/> Communications &amp; Public Affairs Director<br/> Phone: 919-968-2757</p>                                     | This information is readily available via a public records request in order to assure accuracy and maintain the security of personally identifiable information.  |
| 09/11/2019   | East Franklin Neighborhood Steering Committee & Neighbors | <a href="#">Request Regarding Neighborhood Preservation.</a>             | <p>Police<br/> <a href="#">Chris Blue</a>,<br/> Police Chief<br/> Phone: 919-968-2766<br/> Planning &amp; Development Services</p>   | While this request did not fall within the scope of the Short Term Rental Task Force, staff will continue to work with residents, the University, and other community members on concerns related to student rental housing.          |
| 06/26/2019   | Julie McClintock  | <a href="#">Request Regarding the Blue Hill Form Based Code.</a>         | Planning & Development Services  | The Council and staff continue to evaluate and update the Blue Hill Form Based Code.  |

| Meeting Date | Petitioner                       | Petition Request   | Departments Responsible   | Petition Status   |
|--------------|----------------------------------|--|---|---|
| 06/26/2019   | Community Design Commission      | <a href="#">Request for Modifications to the Concept Plan Review Process.</a>  | Planning & Development Services   | The Council most recently discussed this at their 09/16/2020 work session. Staff is piloting new ways to present Concept Plans to boards, using Town projects as subjects.  |
| 04/24/2019   | Board of Adjustment              | <a href="#">Request Regarding Neighborhood Conservation District Ordinances.</a>   | Planning & Development Services   | The Town is currently in the process of updating its Land Use Management Ordinance. This idea is under consideration as a part of this process.   |
| 04/17/2019   | Amy Ryan for Planning Commission | <a href="#">Commission Regarding Site Plan Review Process.</a>   | Planning & Development Services   | Staff will coordinate with the Council Committee on Boards and Commissions to consider this request.  |
| 02/13/2019   | Citizens                         | <a href="#">Request Regarding Coal Use and Coal Ash.</a>   | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707                               | Remediation work is almost complete along the Bolin Creek Trail near the Police Department. UNC is expected to release their Climate Action Plan in 2021, which is expected to address UNC coal use in the future.                                      |
| 09/19/2018   | Julie McClintock of CHALT        | <a href="#">Regarding Land Use Intensification.</a>  | Planning & Development Services<br><br>Public Works<br><a href="#">Lance Norris</a> ,<br>Public Works Director<br>Phone: 919-969-5100 | On 6/12/2019, Council received a presentation on the Town's Stormwater program. On 12/9/2020 Council adopted the use of FEMA Flood Resiliency Maps. In 2/2021, Council received more info on Stormwater programs LUMO update will consider other ideas. |
| 06/27/2018   | Susanne Kjemtrup / Brian Hageman | <a href="#">Transportation and Connectivity Advisory Board Request for an Electric Vehicle Provision in the Land Use Management Ordinance.</a> | Planning & Development Services   | The Town is currently in the process of updating its Land Use Management Ordinance. These ideas are under consideration as a part of this process.  |
| 06/13/2018   | Mayor Pam Hemminger              | <a href="#">Regarding Reviewing Policies, Procedures, and Practices for Development.</a>   | Planning & Development Services   | A Town web page with TIA exemption requests is available. Staff continues to look for ways to apply the LUMO clearly and consistently for all stakeholders in the development process.  |
| 06/13/2018   | Mayor pro tem Jessica Anderson   | <a href="#">Request to Amend Bus Advertising Policy.</a>   | Transit<br><a href="#">Brian Litchfield</a> ,<br>Transit Director<br>Phone: 919-969-4908  | At their 01/22/19 meeting, the Chapel Hill Transit Public Transit Committee considered the draft nonpublic forum transit advertising policy in order to provide feedback to the Chapel Hill Town Council on the option of amending the policy.          |
| 06/13/2018   | Ondrea Austin                    | <a href="#">CHALT's Request to Revise the Tree Ordinance.</a>  | Planning & Development Services   | The Town is currently in the process of updating its Land Use Management Ordinance. This idea is under consideration as a part of this process.   |

| Meeting Date | Petitioner                                  | Petition Request   | Departments Responsible  | Petition Status   |
|--------------|---|--|--|---|
| 03/14/2018   | Council Members Anderson, Gu, and Schaevitz | <a href="#">Request Regarding Addressing Blue Hill District Community Interests.</a> | Planning & Development Services  | Council enacted ordinance amendments pertaining to stormwater management, affordable housing, and non-residential development, as well as building size, massing, and permeability. Council considered amendments for townhomes and deferred action.        |
| 11/07/2016   | Mayor Hemminger                             | <a href="#">Regarding Parking and Transit Needs in Downtown Area.</a>                | Planning & Development Services<br><br>Police<br><a href="#">Chris Blue</a> ,<br>Police Chief<br>Phone: 919-968-2766<br><br>Public Works<br><a href="#">Lance Norris</a> ,<br>Public Works Director<br>Phone: 919-969-5100 | Recent actions include replacing parking pay stations, implementing Downtown Ambassadors program, and including additional parking with required Wallace Parking Deck repairs. Next steps include parking payments-in-lieu and public/private partnerships. |

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## STATUS OF PETITIONS TO COUNCIL

Petitions submitted during the Town Council meetings are added to the list below, typically within five business days of the meeting date.

To contact the department responsible, click on the department name. Meeting materials are posted on the [Council Meetings calendar](#).

| <div>Public Initiated</div> <div>Council Initiated</div> <div>Closed</div> |   |  |  |   |
|--|---|--|--|---|
| Meeting Date   | Petitioner  | Petition Request   | Departments Responsible  | Petition Status   |
| 10/27/2021   | Mayor Hemminger and the Chapel Hill Downtown Partnership  | <a href="#">Request that the Town Explore Taking Over the Downtown Portion of Franklin Street.</a> | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707<br><br>Public Works<br><a href="#">Lance Norris</a> ,<br>Public Works Director<br>Phone: 919-969-5100  | The Council discussed this at their 01/05/22 work session.  |
| 09/22/2021   | Council Members   | <a href="#">Regarding Long Range Planning for Future Growth</a>                                    | Planning & Development Services  | A RFP for a community visioning process was issued in March 2022 in order to engage a consultant for this work.   |
| 09/22/2021   | Council Members Stegman, Huynh, Buansi, and Parker  | <a href="#">Regarding Affordable and Missing Housing</a>   | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707<br><br>Housing & Community<br><a href="#">Sarah Vinas</a> ,<br>Interim Director<br>Phone: 919-969-5079 | Staff prepared a draft Work Plan to address the the petition's interests and is piloting an expedited application review for projects proposing 100% affordable units. Council will receive an update on expedited review at an upcoming meeting. |
| 06/28/2021   | Council Member Ryan on Behalf of Mayor Hemminger, Council Member Stegman, and Council Member Gu | <a href="#">Request Regarding Stormwater Storage Basin Projects.</a>                               | Public Works<br><a href="#">Lance Norris</a> ,<br>Public Works Director<br>Phone: 919-969-5100   | The Town has paused proposed stormwater projects pending a broader community discussion. The Town hosted a community information meeting about the flood storage projects identified in the Lower Booker Creek Subwatershed Study on 09/13/2021.  |



| Meeting Date | Petitioner  | Petition Request  | Departments Responsible  | Petition Status   |
|--------------|---|---|--|---|
| 06/09/2021   | Council Members Parker, Ryan, Huynh, Stegman, and Gu                    | <a href="#">Request Regarding Comprehensive Review of Stormwater Regulations.</a>   | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707<br><br>Public Works<br><a href="#">Lance Norris</a> ,<br>Public Works Director<br>Phone: 919-969-5100            | The Council discussed this at their 10/20/21 work session. Staff will explore options for partnering with the LUMO rewrite consultant to perform this review.                                   |
| 05/19/2021   | Council Members Stegman and Parker                                      | <a href="#">Request Regarding Tax Equity Fund.</a>  | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707  | Staff is preparing information to respond to this request.  |
| 05/05/2021   | Mayor pro tem Parker, Council Member Buansi, and Council Member Stegman | <a href="#">Request Regarding Chapel Hill Increasing its Minority and Women Business Enterprise/Disadvantaged Business Enterprise (MWBE/DBE) Contracting Targets.</a> | Business Management<br><a href="#">Amy Oland</a> ,<br>Business Management Director<br>Phone: 919-969-5017<br><br>Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707 | Based on Council direction, staff will build increased targets into the upcoming work on the East Rosemary Parking Deck project. Staff will continue working to respond to the broader request. |
| 03/24/2021   | Council Member Anderson   | <a href="#">Request Regarding Manufactured Home Parks</a>   | Town Manager<br><a href="#">Ross Tompkins</a> ,<br>Assistant to the Town Manager<br>Phone: 919-968-2707<br><br>Housing & Community<br><a href="#">Sarah Vinas</a> ,<br>Interim Director<br>Phone: 919-969-5079           | The Council will consider endorsing the County-Wide Coordinated Manufactured Homes Action Plan at their 04/27/22 meeting.   |
| 03/24/2021   | Mayor Hemminger   | <a href="#">Request Regarding Self Storage</a>  | Planning & Development Services  | Staff is preparing information to respond to this request.  |

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# TOWN OF CHAPEL HILL

Town Hall  
405 Martin Luther King Jr.  
Boulevard  
Chapel Hill, NC 27514

## Item Overview

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**Item #:** 8., **File #:** [22-0347], **Version:** 1

**Meeting Date:** 4/27/2022

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**Receive the Schools Adequate Public Facilities Ordinance (SAPFO) 2022 Annual Technical Advisory Committee Report.**

See Staff Report on next page.

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**The Agenda will reflect the text below and/or the motion text will be used during the meeting.**

By accepting the report, the Council receives the Schools Adequate Public Facilities Ordinance (SAPFO) 2022 Annual Technical Advisory Committee Report.



## RECEIVE THE SCHOOLS ADEQUATE PUBLIC FACILITIES ORDINANCE (SAPFO) 2022 ANNUAL TECHNICAL ADVISORY COMMITTEE REPORT

### STAFF REPORT

TOWN OF CHAPEL HILL PLANNING DEPARTMENT  
Colleen Willger, Planning Director  
Judy Johnson, Assistant Planning Director  
Corey Liles, Planning Manager

|   |          |                                       |  |                                       |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |
|---|----------|---------------------------------------|--|---------------------------------------|--|---|--|------------|------|--------|------|------|------|--|----------|------------|--------------------------|------------|-------|-------|-------|--------|-------|-------|-------|------|-------|-------|---|-------|--------|--------|-------|
| <b>PROJECT LOCATION</b><br>CHCCS District   |          | <b>MEETING DATE</b><br>April 27, 2022 |  | <b>REQUESTED BY</b><br>SAPFO Partners |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |
| <b>STAFF’S RECOMMENDATION</b><br>That the Council receive this report and provide any comments to the Orange County Board of Commissioners.   |          |                                       |  |                                       |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |
| <b>PROCESS</b><br>In 2003, the School Adequate Public Facilities Ordinance partners (Carrboro, Chapel Hill, Chapel Hill-Carrboro City Board of Education, and Board of County Commissioners) entered the Schools Adequate Public Facilities Memorandum of Understanding. The Memorandum calls for the following process:<br><br><div><div>1</div>BOCC transmits Draft Report to Partners</div> <div><div>2</div>Council and Partners provide comments</div> <div><div>3</div>BOCC certification of Annual SAPFO Report (anticipated May 2022)</div><br>The School Adequate Public Facilities Ordinance (SAPFO) is a dynamic regulatory tool with two primary parts. The Certificate of Adequate Public Schools (CAPS) tests student generation rates from development projects against the available capacity within a school. Secondly, historical enrollment is tracked and future enrollment is projected against existing capacity. |          |                                       | <b>KEY DATA</b><br><br>Level of Service Standard (LOS)<br>(Membership as percentage of Capacity)<br><table><tr><td colspan="2">Chapel Hill-Carrboro City School District</td></tr><tr><td>Elementary</td><td>105%</td></tr><tr><td>Middle</td><td>107%</td></tr><tr><td>High</td><td>110%</td></tr></table><br><br>Building Capacities<br><table><tr><td></td><td>Capacity</td><td>Membership</td><td>Increase from Prior Year</td></tr><tr><td>Elementary</td><td>5,664</td><td>4,738</td><td>(155)</td></tr><tr><td>Middle</td><td>2,944</td><td>2,802</td><td>(115)</td></tr><tr><td>High</td><td>3,975</td><td>3,940</td><td>8</td></tr><tr><td>Total</td><td>12,583</td><td>11,480</td><td>(262)</td></tr></table>  |                                       |  | Chapel Hill-Carrboro City School District |  | Elementary | 105% | Middle | 107% | High | 110% |  | Capacity | Membership | Increase from Prior Year | Elementary | 5,664 | 4,738 | (155) | Middle | 2,944 | 2,802 | (115) | High | 3,975 | 3,940 | 8 | Total | 12,583 | 11,480 | (262) |
|   |          |                                       | Chapel Hill-Carrboro City School District  |                                       |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |
|   |          |                                       | Elementary   | 105%                                  |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |
|   |          |                                       | Middle   | 107%                                  |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |
|   |          |                                       | High   | 110%                                  |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |
|   | Capacity | Membership                            | Increase from Prior Year   |                                       |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |
| Elementary  | 5,664    | 4,738                                 | (155)  |                                       |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |
| Middle  | 2,944    | 2,802                                 | (115)  |                                       |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |
| High  | 3,975    | 3,940                                 | 8  |                                       |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |
| Total   | 12,583   | 11,480                                | (262)  |                                       |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |
| <b>OVERVIEW AND FISCAL IMPACT</b><br>The current SAPFO report does not show immediate capital needs and indicates a need to continue school district analysis to determine the best method to resolve new demands through redistricting, renovation, new school construction, or other methods.<br><br>Current student growth projections show no need over the next 10 years for additional schools or capacity in the Chapel Hill-Carrboro City Schools District.   |          |                                       | <b>SAPFO STATUS</b><br><br>Elementary School Level<br><div>a. Does not exceed 105% LOS standard (currently 83.7%)</div> <div>b. Growth rate expected to decrease over next 10 years (average ~-0.88% growth per year)</div> <div>c. No new elementary school needed for next 10 years</div><br>Middle School Level<br><div>a. Does not exceed 107% LOS standard (currently 95.2%)</div> <div>b. Growth rate expected to decrease over next 10 years (average -2.1% per year)</div> <div>c. No new middle school needed for next 10 years</div><br>High School Level<br><div>a. Does not exceed 110% LOS standard (99.1%)</div> <div>b. Growth rate expected to decrease over next 10 years (average ~-2.15% per year)</div> <div>c. No new high school capacity needed for next 10 years</div> |                                       |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |
| <b>ATTACHMENTS</b>  |          |                                       | 1. Orange County, NC Schools Adequate Public Facility Ordinance Annual Report 2022 (Draft)<br>2. SAPFO Memorandum of Understanding   |                                       |  |   |  |            |      |        |      |      |      |  |          |            |                          |            |       |       |       |        |       |       |       |      |       |       |   |       |        |        |       |

# TECHNICAL REPORT

Council Meeting – 04/27/2022



## SAPFO ANNUAL REPORT 2022

The annual SAPFO report is written by Orange County staff. Town of Chapel Hill staff offers the following Technical Report to summarize key information.

### BACKGROUND

The information in the annual report identifies the effect that changes in student enrollment and capacity have on the Capital Investment Plan (CIP) and the future issuance of Certificates of Adequate Public Schools (CAPS). Available student capacity is calculated annually on November 15<sup>th</sup>, based on actual student membership at that time.

*Certificates of Adequate Public Schools (CAPS):* Per the 2003 Memorandum, any development within Chapel Hill, Carrboro, or Orange County proposing to increase the overall number of residential units must secure a CAPS document from the local school board. This document verifies that the student population generated by new residential units will not exceed the available student capacity for a given. In Chapel Hill, residential development approved by the Town Council or Planning Commission includes a stipulation requiring that the applicant present a CAPS document to the Town before construction.

### KEY THEMES FROM THE 2022 REPORT

- *Impacts of COVID:* Both Orange County and Chapel Hill-Carrboro City Schools districts are still experiencing impacts from COVID, as many students have been withdrawn and enrolled in private schools with in-person learning or are being homeschooled. Orange County Staff continues to believe this impact is temporary, but the loss of students has impacted 10-year projections. Orange County Planning Staff developed four alternative projections to model future growth rates and service levels without impacts from COVID. All four projections predicted that no new capacity is needed in the 10-year projection period for both districts.
- *Pre-K Enrollment:* At this time, SAPFO has not been amended to include Pre-K enrollment; it has remained an ongoing topic of discussion. However, Pre-K membership numbers are monitored by the SAPFO Technical Advisory Committee (TAC) and are included in the annual report as of the 2019-20 school year.
- *Charter Schools:* Charter and private schools are not included in the annual report, but SAPFOTAC monitors their effect on student enrollment. If a charter or private school were to close, the projections would likely accelerate the need for additional capacity, but likely within an appropriate time to include updates to the Capital Investment Plan.
- *Future Residential Growth:* Planned residential development may soon increase student numbers and accelerate school construction and expansion needs into the 10-year projection period. However, proposed growth is not included in the SAPFO projection system until students begin enrollment. Once students begin enrolling, the 10-year projections can be updated to display future capacity needs in time to efficiently plan for future school capacity/construction requests.
- *School Renovation and Expansion:* Both school districts continue planning efforts to renovate and expand existing facilities to address school capacity needs, which is more feasible than new school construction. These expansions will be added to

## **TECHNICAL REPORT**

Council Meeting – 04/27/2022

the projection model in stages and may delay the need to construct new schools.

### **FISCAL IMPACT/RESOURCES**

Current student growth projections do not show new school capacity needs in the next 10 years for Chapel Hill-Carrboro City Schools.

**ORANGE COUNTY  
BOARD OF COMMISSIONERS  
ACTION AGENDA ITEM ABSTRACT  
Meeting Date: March 15, 2022**

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

**SUBJECT:** Schools Adequate Public Facilities Ordinance (SAPFO) – Receipt and Transmittal of 2022 Annual Technical Advisory Committee Report

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**DEPARTMENT:** Planning and Inspections

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**ATTACHMENT(S):**

1. SAPFO Partners Transmittal Letter
2. Draft 2022 SAPFOTAC Annual Report and Larger Scale Projection Worksheets

**INFORMATION CONTACT:**

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

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**PURPOSE:** To receive the 2022 Annual Report of the SAPFO Technical Advisory Committee (SAPFOTAC) and transmit it to the SAPFO partners for comments before certification in May.

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

**BACKGROUND:**

**1. Annual Report**

Each year, since 2004, the SAPFOTAC Report is updated to reflect actual changing conditions of student membership and school capacity. This information is analyzed and used to project future school construction needs based on adopted level of service standards. There are two steps to the full report. The first part (Student Membership and Capacity) is certified in the fall and then this full report, in the following spring, is to keep the SAPFO system calibrated. At the December 14, 2021 Board of County Commissioners meeting, the Board approved the November 15, 2021 actual membership and capacity numbers (i.e. first part) for both Orange County Schools (OCS) and Chapel Hill-Carrboro City Schools (CHCCS). A draft of the full annual SAPFOTAC Report is complete and has been reviewed by the SAPFOTAC members.

**2. SAPFOTAC**

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

### 3. Membership Data

CHCCS membership decreased in total by 262 students from the previous year.

- 155 Elementary School
- 115 Middle School
- + 8 High School

OCS membership increased in total by 65 students from the previous year.

- 24 Elementary School
- 2 Middle School
- + 91 High School

### 4. Capacity Data

High School capacity for Orange County Schools was increased by 500 students due to the Cedar Ridge High School addition. There were no changes to school capacities this year for Chapel Hill – Carrboro City Schools.

### 5. Capacity Information

#### SAPFO vs. DPI

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

### 6. Student Projection Analysis

#### CHCCS

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

#### OCS

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

### 7. School Capacity CIP Needs Analysis

#### CHCCS

Projected needs:

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

#### OCS

Projected needs:

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

## **8. Student Generation Rates**

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

## **9. Access to Full Report**

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

## **10. Additional Information**

### **COVID Impacts**

Both school districts are still experiencing impacts from COVID due to a decrease in student membership as a result of students being withdrawn and enrolled in private schools with in-person learning or homeschooled. At this time, staff believes these are temporary impacts and a majority of these students will return when in-person learning commences on a stable basis. However, the loss of students has impacted the SAPFO 10-year projections by decreasing future student growth rates and service levels and pushing building capacity needs far beyond the 10-year projection period. Recognizing concerns with these projections not being constructive in planning for the future or when students return to the classroom, Orange County Planning staff drafted hypothetical 2021-22 student membership and grade level numbers in order to generate alternative 10-year student projections. Additional information can be found on page iii of the Executive Summary.

### **Pre-K Enrollment**

In recent years, Pre-K enrollment has been a topic of discussion with both school districts. However, SAPFO has not been amended to include Pre-K in the membership and capacity numbers. Therefore, Pre-K children are not included in the membership numbers reported. Discussions regarding Pre-K students and impacts have been ongoing, however, COVID priorities have been the focus over the last several months. Pre-K membership enrollment for both districts are contained in the Executive Summary of the report.

### **Charter Schools**

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 formally monitored or included in future projections. However, the SAPFO Technical Advisory Committee does monitor charter and private schools and their effect on student enrollment in both school districts. Additional information regarding charter school enrollment is contained in the Executive Summary.

**FINANCIAL IMPACT:** Current student growth projections do not show capacity needs for additional schools in either the CHCCS District or OCS District during the 10-year projection period.

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



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

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

**ENVIRONMENTAL IMPACT:** There are no Orange County Environmental Responsibility Goal impacts associated with this item.

**RECOMMENDATION(S):** The Manager recommends the Board:

1. Receive the 2022 SAPFOTAC Annual Report; and
2. Authorize the Chair to sign the transmittal letter to SAPFO partners contained in Attachment 1.

BOCC Letterhead

March 16, 2022

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

Carrie Doyle, Chair  
Orange County Board of Education  
200 E. King Street  
Hillsborough, NC 27278

Damon Seils, Mayor  
Town of Carrboro  
301 W. Main Street  
Carrboro, NC 27510

Deon Temne, Chair  
Chapel Hill - Carrboro Board of Education  
750 Merritt Mill Road  
Chapel Hill, NC 27516

Jenn Weaver, Mayor  
Town of Hillsborough  
P.O. Box 429  
Hillsborough, NC 27278

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

Dear Sir or Madam:

This letter is to update you on the status of the 2022 Annual SAPFOTAC Report. In accordance with the SAPFO Memoranda of Understanding (MOU), the Board of County Commissioners (BOCC) approved the November 15, 2021 actual membership and capacity numbers for Orange County Schools and Chapel Hill - Carrboro City Schools at its meeting on December 14, 2021.

The SAPFOTAC, comprised of representatives of both school systems and the Planning Directors of the County and Towns has produced the 2022 Annual Report. As per the SAPFO MOU, the annual technical report contains information on Level of Service, Building Capacity, Membership Date, Capital Investment Plan, Student Membership Projection Methodology, Student Membership Projections, Student Membership Growth Rate, Student/Housing Generation Rate, and the SAPFO Process. Enclosed for your use are copies of the 2022 Executive Summary and the March 15, 2022 BOCC meeting agenda item abstract when the BOCC received the draft report.

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

The 2022 Annual SAPFOTAC Report is scheduled to be certified by the BOCC at a regular meeting in May 2022. Therefore, if you have any comments pertaining to the report, please forward them to Ashley Moncado, Planner II, (919-245-2589) or [amoncado@orangecountync.gov](mailto:amoncado@orangecountync.gov) no later than 5:00 p.m. on **April 18, 2022**. Any comments received will be part of our agenda package in May.

Please share this information and the 2022 SAPFOTAC report with your respective boards.

Sincerely,

Renee Price  
Chair

Enclosures

cc: Bonnie Hammersley, Orange County Manager  
Travis Myren, Deputy Orange County Manager  
Richard White, Manager, Town of Carrboro  
Maurice Jones, Manager, Town of Chapel Hill  
Eric Peterson, Manager, Town of Hillsborough  
Nyah Hamlett, Superintendent, Chapel Hill-Carrboro City Schools  
Vernon Hall, Director, School Counseling and Enrollment, Chapel Hill-Carrboro City Schools  
Monique Felder, Superintendent, Orange County Schools  
Patrick Abele, Deputy Superintendent of Operations, Orange County Schools  
Catherine Mau, Student Assignment & Technology Project Coordinator, Orange County Schools  
Trish McGuire, Planning Director, Town of Carrboro  
Colleen Willger, Planning and Development Services Director, Town of Chapel Hill  
Margaret Hauth, Assistant Town Manager, Town of Hillsborough

# **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 2022**

**(BASED ON NOVEMBER 2021 DATA)**

**CERTIFIED BY THE BOCC ON MAY X, 2022**

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## 2022 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> | 5664  | 4738       | (155)                  | 3361                                 | 3023       | (24)                   |
| <i>Middle</i>     | 2944  | 2802       | (115)                  | 2166                                 | 1656       | 2                      |
| <i>High</i>       | 3975  | 3940       | 8                      | 2939                                 | 2472       | 91                     |

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

### II. Annual Update to SAPFO System

#### A. Capital Investment Plan (CIP) .....(No Change).....Pg. 18

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

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

#### Analysis of 5 Years of Projections for 2021-2022 School Year – Chapel Hill/Carrboro City Schools

(The first column for each year includes the student membership projection made for 2021-2022 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 2021-2022 Membership |       |           |      |           |      |           |      |           |     |
|-------------------|------------------------|---|-------|-----------|------|-----------|------|-----------|------|-----------|-----|
|                   | Actual 2021 Membership | 2016-2017                                     |       | 2017-2018 |      | 2018-2019 |      | 2019-2020 |      | 2020-2021 |     |
| <b>Elementary</b> | 4738                   | 5795  | H1057 | 5488      | H750 | 5474      | H736 | 5357      | H619 | 4808      | H70 |
| <b>Middle</b>     | 2802                   | 2999  | H197  | 2924      | H122 | 2961      | H159 | 3016      | H214 | 2847      | H45 |
| <b>High</b>       | 3940                   | 3897  | L43   | 3934      | L6   | 3981      | H41  | 4021      | H81  | 3904      | L36 |

### Analysis of 5 Years of Projections for 2021-2022 School Year – Orange County Schools

(The first column for each year includes the student membership projection made for 2021-2022 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 2021-2022 Membership |      |           |      |           |      |           |      |           |      |
|------------|------------------------|---|------|-----------|------|-----------|------|-----------|------|-----------|------|
|            | Actual 2021 Membership | 2016-2017                                     |      | 2017-2018 |      | 2018-2019 |      | 2019-2020 |      | 2020-2021 |      |
| Elementary | 3023                   | 3283  | H260 | 3198      | H175 | 3278      | H239 | 3281      | H258 | 3011      | L12  |
| Middle     | 1656                   | 1748  | H92  | 1709      | H53  | 1731      | H75  | 1719      | H63  | 1634      | L22  |
| High       | 2472                   | 2559  | H87  | 2474      | H2   | 2388      | L84  | 2415      | L57  | 2365      | L107 |

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

| Projected Average Annual Growth Rate Over Next 10 Years |           |           |           |           |           |                               |           |           |           |           |
|---|-----------|-----------|-----------|-----------|-----------|-------------------------------|-----------|-----------|-----------|-----------|
| Chapel Hill/Carrboro School District                    |           |           |           |           |           | Orange County School District |           |           |           |           |
| Year Projection Made:                                   | 2017-2018 | 2018-2019 | 2019-2020 | 2020-2021 | 2021-2022 | 2017-2018                     | 2018-2019 | 2019-2020 | 2020-2021 | 2021-2022 |
| Elementary  | 0.36%     | 0.56%     | 0.65%     | -0.23%    | -0.88%    | 0.58%                         | 0.91%     | 0.84%     | -0.02%    | -0.04%    |
| Middle  | 0.21%     | 0.19%     | -0.07%    | -1.50%    | -2.10%    | 0.13%                         | 0.28%     | 0.37%     | -0.67%    | -0.72%    |
| High  | 0%        | 0.16%     | 0.03%     | -1.44%    | -2.15%    | -0.10%                        | 0.21%     | 0.21%     | -0.98%    | -1.06%    |

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

## SCHOOL ADEQUATE PUBLIC FACILITIES ORDINANCE STATUS

(Based on future year Student Membership Projections)

### CHAPEL HILL/CARRBORO SCHOOL DISTRICT

#### Elementary School Level

- Does not currently exceed 105% LOS standard (current LOS is 83.7%).
- The projected growth rate at this level is expected to decrease over the next 10 years (average ~ -.88% per year compared to -0.74% over the past 10 years).
- Similar to last year, projections are not showing a need for an additional Elementary School in the 10-year projection period.

#### Middle School Level

- Does not currently exceed 107% LOS standard (current LOS is 95.2%).
- The projected growth rate at this level is expected to decrease over the next 10 years (average ~ -2.10% compared to an average of 0.72% over the past 10 years).
- Similar to last year, projections are not showing a need for an additional Middle School in the 10-year projection period.

#### High School Level

- Does not currently exceed the 110% LOS standard (current LOS is 99.1%).
- The projected growth rate at this level is expected to decrease over the next 10 years (average ~ -2.15% compared to 0.79% over the past 10 years).
- Similar to last year, 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 89.9%).
- B. The projected growth rate at this level is expected to increase, but remain negative over the next 10 years (average ~ -0.04% compared to -0.71% over the past 10 years).
- C. Similar to last year, 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 76.5%).
- B. The projected growth rate at this level is expected to decrease over the next 10 years (average ~ -0.72% compared to -0.23% over the past 10 years).
- C. Similar to last year, 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 84.1%).
- B. The projected growth rate at this level is expected to decrease over the next 10 years (average ~ -1.06% compared to 0.72% over the past 10 years).
- C. Capacity has increased by 500 seats due to the Cedar Ridge High School addition. Projections are not showing a need for additional High School in the 10-year projection period.

## **ADDITIONAL INFORMATION**

### **COVID Impacts**

Both school districts are still experiencing impacts from COVID due to a decrease in student membership as a result of students being withdrawn and enrolled in private schools with in-person learning or homeschooled. At this time, staff believes these are temporary impacts and a majority of these students will return when in-person learning commences on a stable basis. However, the loss of students has impacted the SAPFO 10-year projections by decreasing future student growth rates and service levels and pushing building capacity needs far beyond the 10-year projection period. Recognizing concerns with these projections not being constructive in planning for the future or when students return to the classroom, Orange County Planning staff drafted hypothetical 2021-2022 student membership and grade level numbers in order to generate alternative 10-year student projections.

Hypothetical student membership and grade level numbers were drafted based on SAPFO data from previous reports. Similar to last year's report, student membership and growth rates were based on the certified 2020 SAPFO Report. The purpose of this was to draft informal projections which may depict future student growth rates and service levels without the impacts from COVID. Staff believes the 10-year projections will correct themselves when students return to the classroom and student membership numbers increase to regular levels. Due to the requirements in the SAPFO MOUs, these projections cannot be certified, but may be documented in the annual report. Similar to the 2021-2022 SAPFO projections, the alternative projections utilize the same methodology contained in the SAPFO MOUs. The four alternative projections were based on the following scenarios and data:

- Scenario 1: Draft 10-year projections using 2019 SAPFO student membership and grade level numbers for this school year.
- Scenario 2: Draft 10-year projections using the average student membership and grade level numbers from 2015-2019



- Scenario 3: Draft 10-year projections using the average Student Growth Rates from 2010-2020, as certified in the 2020 SAPFO Report.
- Scenario 4: Draft 10-year projections using the average Student Growth Rates for 2021-2031, as certified in the 2020 SAPFO Report

Based on the four alternative projections, no capacity needs were identified in the 10-year projection period for both districts. Outcomes (i.e. projected student membership, service levels, and student growth rates) of the alternative projections are similar to 10-year projections contained in previous SAPFO reports. The following tables provide a summary of the alternative projections for the 2031-32 school year including average student membership numbers and service levels. In addition, average student membership numbers and service levels from the 2021-22 SAPFO projections are provided for comparison purposes. The 2021-22 SAPFO projection sheets, contained on pages 36 and 37 of this report, are certified annually by the Orange County Board of Commissioners. Spreadsheets of the alternative projections can be provided upon request.

provided upon request.

| Chapel Hill – Carrboro City Schools |  |                      |                      |                      |                      |                      |
|-------------------------------------|--|----------------------|----------------------|----------------------|----------------------|----------------------|
|                                     | SAPFO Level of Service (LOS) and Building Capacity |                      |                      |                      |                      |                      |
|                                     | Elementary   |                      | Middle               |                      | High                 |                      |
|                                     | Capacity at 100% LOS                               | Capacity at 105% LOS | Capacity at 100% LOS | Capacity at 107% LOS | Capacity at 100% LOS | Capacity at 110% LOS |
|                                     | 5,664  | 5,947                | 2,944                | 3,150                | 3,975                | 4,373                |
|                                     | 2031-32 School Year                                |                      |                      |                      |                      |                      |
|                                     | Elementary   |                      | Middle               |                      | High                 |                      |
|                                     | Average Membership                                 | Level of Service     | Average Membership   | Level of Service     | Average Membership   | Level of Service     |
|                                     | Scenario 1   | 5,655                | 99.8%                | 3,038                | 103.2%               | 3,932                |
| Scenario 2                          | 5,453  | 96.3%                | 2,904                | 98.6%                | 3,868                | 97.3%                |
| Scenario 3                          | 5,678  | 100.2%               | 3,108                | 105.6%               | 4,097                | 103.1%               |
| Scenario 4                          | 5,718  | 101.0%               | 3,103                | 105.4%               | 4,061                | 102.2%               |
| 2021-22 Projections*                | 4,333  | 76.5%                | 2,264                | 76.9%                | 3,169                | 79.7%                |

| Orange County Schools |  |                      |                      |                      |                      |                      |
|-----------------------|--|----------------------|----------------------|----------------------|----------------------|----------------------|
|                       | SAPFO Level of Service (LOS) and Building Capacity |                      |                      |                      |                      |                      |
|                       | Elementary   |                      | Middle               |                      | High                 |                      |
|                       | Capacity at 100% LOS                               | Capacity at 105% LOS | Capacity at 100% LOS | Capacity at 107% LOS | Capacity at 100% LOS | Capacity at 110% LOS |
|                       | 3,361  | 3,529                | 2,166                | 2,318                | 2,939                | 3,233                |
|                       | 2031-32 School Year                                |                      |                      |                      |                      |                      |
|                       | Elementary   |                      | Middle               |                      | High                 |                      |
|                       | Average Membership                                 | Level of Service     | Average Membership   | Level of Service     | Average Membership   | Level of Service     |
|                       | Scenario 1   | 3,454                | 102.8%               | 1,812                | 83.7%                | 2,440                |
| Scenario 2            | 3,165  | 94.2%                | 1,665                | 76.9%                | 2,313                | 78.7%                |
| Scenario 3            | 3,453  | 102.7%               | 1,837                | 84.8%                | 2,532                | 86.2%                |
| Scenario 4            | 3,516  | 104.6%               | 1,860                | 85.9%                | 2,556                | 87.0%                |
| 2021-22 Projections*  | 3,011  | 89.6%                | 1,539                | 71.1%                | 2,222                | 75.6%                |

### Pre-K Students

In recent years, Pre-K enrollment has been a topic of discussion with both school districts. At this time, SAPFO has not been amended to include Pre-K in the membership and capacity numbers. Pre-K enrollment has been included in discussions regarding changes in class size and school capacity. However, Pre-K numbers and impacts continue to be monitored by the SAPFOTAC. In addition, the annual report will begin to report Pre-K membership beginning with the 2019-20 school year, prior to COVID impacts. 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                               | 86                    |
| 2021-22     | 222                               | 125                   |

### 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)           | 365*                  |

*\*The Expedition School reached full capacity of 365 students last school year*

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)             |

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 continue to monitor and evaluate the demand and growth of residential development throughout Orange County as well as its effect 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. As a result, the expected number of students is based on unit type and bedroom count estimates.

| <b>Residential Project</b>                            | <b>Jurisdiction</b> | <b>Proposed Total Units</b> | <b>Expected Number of Students</b>       |
|---|---------------------|-----------------------------|--|
| <b>Collins Ridge Phase 1</b>                          | Hillsborough        | 672                         | Elementary: 84<br>Middle: 45<br>High: 57 |
| <b>Weavers Grove</b>                                  | Chapel Hill         | 235                         | Elementary: 44<br>Middle: 18<br>High: 20 |
| <b>The Meadows</b>                                    | Mebane              | 167                         | Elementary: 34<br>Middle: 18<br>High: 23 |
| <b>Stagecoach Corner</b>                              | Mebane              | 35                          | Elementary: 9<br>Middle: 5<br>High: 6    |
| <b>Bowman Village/ Bowman Place</b>                   | Mebane              | 177                         | Elementary: 48<br>Middle: 23<br>High: 30 |
| <b>The Townes of Oakwood Square</b>                   | Mebane              | 88                          | Elementary: 5<br>Middle: 4<br>High: 5    |
| <b>Northeast Village (Havenstone Phase 1 &amp; 2)</b> | Mebane              | 169                         | Elementary: 46<br>Middle: 22<br>High: 29 |
| <b>Tupelo Junction</b>                                | Mebane              | 181                         | Elementary: 49<br>Middle: 24<br>High: 31 |



**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 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.

## **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**

| <b>Chapel Hill-Carrboro City School District<br/>SAPFO</b> | <b>Orange County School District<br/>SAPFO</b> |
|--|--|
| 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  
Technical Advisory Committee  
(aka SAPFOTAC)**

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

Town of Chapel Hill  
Colleen R. Willger, Planning and Development Services Director  
405 Martin Luther King, Jr. Blvd.  
Chapel Hill, North Carolina 27514

Town of Hillsborough  
Margaret Hauth, Assistant Town Manager  
P.O. Box 429  
Hillsborough, NC 27278

Orange County  
Craig Benedict, Planning Director  
Ashley Moncado, Special Projects Planner  
Gary Donaldson, Director of Finance and Administrative Services  
131 W. Margaret Lane  
P.O. Box 8181  
Hillsborough, NC 27278

Orange County School District  
Monique Felder, Superintendent  
200 E. King Street  
Hillsborough, NC 27278

Chapel Hill-Carrboro City School District  
Nyah Hamlett, Superintendent  
750 Merritt Mill Road  
Chapel Hill, NC 2751

## I. Base Memorandum of Understanding

### A. Level of Service

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

| 3. <i>Standard for:</i>                   |        |             | <i>Standard for:</i>          |        |             |
|---|--------|-------------|-------------------------------|--------|-------------|
| Chapel Hill-Carrboro City School District |        |             | Orange County School District |        |             |
| Elementary                                | Middle | High School | Elementary                    | Middle | High School |
| 105%                                      | 107%   | 110%        | 105%                          | 107%   | 110%        |

- |   |  |
|---|--|
| <p>4. <b>Analysis of Existing Conditions:</b></p> <p><b>Chapel Hill-Carrboro City School District</b></p> <p>These standards are acceptable at this time.</p> | <p><b>Analysis of Existing Conditions:</b></p> <p><b>Orange County School District</b></p> <p>These standards are acceptable at this time.</p> |
|---|--|

- |  |   |
|--|---|
| <p>5. <b>Recommendation:</b></p> <p><b>Chapel Hill-Carrboro City School District</b></p> <p>No change from above standard.</p> | <p><b>Recommendation:</b></p> <p><b>Orange County School District</b></p> <p>No change from above standard.</p> |
|--|---|



## 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:

- 2003:** Increase of 619 at Rashkis Elementary.  
**2004:** No changes at Elementary, Middle, or High School levels.

### **Standard for:**

#### **Orange County School District**

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

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

*Section I*

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

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

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

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

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

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

**2011:** No changes at Elementary, Middle, or High School levels.

**2012:** No changes at Elementary, Middle, or High School levels.

**2013:** An increase in capacity of 585 students due to the opening of Northside Elementary School.

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

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

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

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

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

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

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

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

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

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

**2011:** No changes at Elementary, Middle, or High School levels.

**2012:** No changes at Elementary or Middle School levels. A decrease of 119 at High School level as a result of a N.C. Department of Public Instruction (DPI) study.

*Section I*

**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.

**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.

**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 2021-2022 capacity is noted on Attachment I.B.4

***Analysis of Existing Conditions:***

**Orange County School District**

The Schools Facilities Task Force developed a system to calculate capacity. Any changes year to year will be monitored, reviewed, and recorded by the SAPFOTAC on approved forms distributed to SAPFO partners and certified upon approval by the Board of County Commissioners each year. The requested 2021-2022 capacity is noted on Attachment I.B.3

*Section I***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.

**Recommendation:****Orange County School District**

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



## Section I

**Attachment I.B.1 Orange County School Capacity (Elementary, Middle, & High)**  
 (2020-21)  
 (Page 1 of 3)

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

**School District:** Orange County Schools

**SAPFO CAPS Year:** November 13, 2020 - November 14, 2021

**Capacity and Membership Submittal Date:** November 13, 2020

| Elementary School | Square Feet    | 2016-2017 Requested Capacity | 2017-2018 Requested Capacity | 2018-2019 Requested Capacity | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|-------------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Cameron Park      | 70,812         | 565                          | 565                          | 502                          | 502                          | 502                          |                          | 567                                 | 112.9%                                  |
| Central           | 52,492         | 455                          | 455                          | 428                          | 428                          | 428                          |                          | 268                                 | 62.6%                                   |
| Efland Cheeks     | 64,316         | 497                          | 497                          | 455                          | 455                          | 455                          |                          | 499                                 | 109.7%                                  |
| Grady Brown       | 74,016         | 544                          | 544                          | 490                          | 490                          | 490                          |                          | 405                                 | 82.7%                                   |
| Hillsborough      | 51,106         | 471                          | 471                          | 420                          | 420                          | 420                          |                          | 427                                 | 101.7%                                  |
| New Hope          | 100,164        | 586                          | 586                          | 526                          | 526                          | 526                          |                          | 533                                 | 101.3%                                  |
| Pathways          | 85,282         | 576                          | 576                          | 540                          | 540                          | 540                          |                          | 348                                 | 64.4%                                   |
| <b>Total</b>      | <b>498,188</b> | <b>3,694</b>                 | <b>3,694</b>                 | <b>3,361</b>                 | <b>3,361</b>                 | <b>3,361</b>                 |                          | <b>3,047</b>                        | <b>90.7%</b>                            |

**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:**

*Morgan J. Elder* 11/14/20  
 Superintendent Date

*Renee A. Price* 1-19-21  
 BOCC Chair Date

## Section I

**Attachment I.B.1 Orange County School Capacity (Elementary, Middle, & High)**  
(2020-21)  
(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 13, 2020 - November 14, 2021

**Capacity and Membership Submittal Date:** November 13, 2020

| Middle School | Square Feet    | 2016-2017 Requested Capacity | 2017-2018 Requested Capacity | 2018-2019 Requested Capacity | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|---------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| A.L. Stanback | 136,000        | 740                          | 740                          | 740                          | 740                          | 740                          |                          | 627                                 | 84.7%                                   |
| C.W. Stanford | 107,620        | 726                          | 726                          | 726                          | 726                          | 726                          |                          | 583                                 | 80.3%                                   |
| Gravelly Hill | 123,000        | 700                          | 700                          | 700                          | 700                          | 700                          |                          | 444                                 | 63.4%                                   |
| <b>Total</b>  | <b>366,620</b> | <b>2,166</b>                 | <b>2,166</b>                 | <b>2,166</b>                 | <b>2,166</b>                 | <b>2,166</b>                 |                          | <b>1,654</b>                        | <b>76.4%</b>                            |

**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:**

*Wesley J. Felder* 11/16/20  
Superintendent Date

*Renée A. Price* 1-19-21  
BOCC Chair Date

## Attachment I.B.1 Orange County School Capacity (Elementary, Middle, &amp; High)

(2020-21)

(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 13, 2020 - November 14, 2021

Capacity and Membership Submittal Date: November 13, 2020

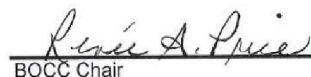
| High School  | Square Feet    | 2016-2017 Requested Capacity | 2017-2018 Requested Capacity | 2018-2019 Requested Capacity | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|--------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Cedar Ridge  | 206,900        | 1,000                        | 1,000                        | 1,000                        | 1,000                        | 1,000                        |                          | 1,035                               | 103.5%                                  |
| Orange       | 213,509        | 1,399                        | 1,399                        | 1,399                        | 1,399                        | 1,399                        |                          | 1,317                               | 94.1%                                   |
| Partnership  | 6,600          | 40                           | 40                           | 40                           | 40                           | 40                           |                          | 29                                  | 72.5%                                   |
|              |                |                              |                              |                              |                              |                              |                          |                                     |   |
|              |                |                              |                              |                              |                              |                              |                          |                                     |   |
|              |                |                              |                              |                              |                              |                              |                          |                                     |   |
| <b>Total</b> | <b>427,009</b> | <b>2,439</b>                 | <b>2,439</b>                 | <b>2,439</b>                 | <b>2,439</b>                 | <b>2,439</b>                 |                          | <b>2,381</b>                        | <b>97.6%</b>                            |

**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:**

 11/14/20  
Superintendent Date

 1-19-21  
BOCC Chair Date



## Section I

**Attachment I.B.2 Chapel Hill-Carrboro City School Capacity (Elementary, Middle, & High)**  
(2020-21)  
(Page 1 of 3)

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

|  |
|--|
| <b>School District:</b> Chapel Hill-Carrboro City Schools        |
| <b>SAPFO CAPS Year:</b> November 13, 2020 - November 14, 2021    |
| <b>Capacity and Membership Submittal Date:</b> November 13, 2020 |


| Elementary School | Square Feet    | 2016-2017 Requested Capacity | 2017-2018 Requested Capacity | 2018-2019 Requested Capacity | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|-------------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Carrboro          | 60,832         | 533                          | 518                          | 518                          | 518                          | 518*                         |                          | 478                                 | 92.3%                                   |
| Ephesus           | 66,952         | 448                          | 436                          | 436                          | 436                          | 436                          |                          | 342                                 | 78.4%                                   |
| Estes Hills       | 56,299         | 527                          | 516                          | 516                          | 516                          | 516                          |                          | 380                                 | 73.6%                                   |
| FP Graham         | 66,689         | 538                          | 522                          | 522                          | 522                          | 522                          |                          | 564                                 | 108.0%                                  |
| Glenwood          | 50,764         | 423                          | 412                          | 412                          | 412                          | 412                          |                          | 433                                 | 105.1%                                  |
| McDougle          | 98,000         | 564                          | 548                          | 548                          | 548                          | 548                          |                          | 488                                 | 89.1%                                   |
| Morris Grove      | 90,221         | 585                          | 568                          | 568                          | 568                          | 568                          |                          | 492                                 | 86.6%                                   |
| Northside         | 99,500         | 585                          | 568                          | 568                          | 568                          | 568                          |                          | 402                                 | 70.8%                                   |
| Rashkis           | 95,729         | 585                          | 568                          | 568                          | 568                          | 568                          |                          | 437                                 | 76.9%                                   |
| Scroggs           | 90,980         | 575                          | 558                          | 558                          | 558                          | 558                          |                          | 474                                 | 84.9%                                   |
| Seawell           | 52,896         | 466                          | 450                          | 450                          | 450                          | 450                          |                          | 403                                 | 89.6%                                   |
| <b>Total</b>      | <b>828,862</b> | <b>5,829</b>                 | <b>5,664</b>                 | <b>5,664</b>                 | <b>5,664</b>                 | <b>5,664</b>                 |                          | <b>4,893</b>                        | <b>86.4%</b>                            |

**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:** Waiting for the Schools Joint Action Committee reductions for class size changes.

**Capacity and Membership Certification:**

 11/15/2020  
\_\_\_\_\_  
Superintendent Date

 1-19-21  
\_\_\_\_\_  
BOCC Chair Date



Section I Attachment I.B.2 Chapel Hill-Carrboro City School Capacity (Elementary, Middle, & High)  
(2020-21)  
(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 13, 2020 - November 14, 2021

**Capacity and Membership Submittal Date:** November 13, 2020


| Middle School | Square Feet    | 2016-2017 Requested Capacity | 2017-2018 Requested Capacity | 2018-2019 Requested Capacity | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|---------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Culbreth      | 122,467        | 774                          | 774                          | 774                          | 774                          | 774                          |                          | 737                                 | 95%                                     |
| McDougle      | 136,221        | 732                          | 732                          | 732                          | 732                          | 732                          |                          | 751                                 | 103%                                    |
| Phillips      | 109,498        | 706                          | 706                          | 706                          | 706                          | 706                          |                          | 694                                 | 98%                                     |
| Smith         | 128,764        | 732                          | 732                          | 732                          | 732                          | 732                          |                          | 735                                 | 100%                                    |
| <b>Total</b>  | <b>496,950</b> | <b>2,944</b>                 | <b>2,944</b>                 | <b>2,944</b>                 | <b>2,944</b>                 | <b>2,944</b>                 |                          | <b>2,917</b>                        | <b>99.1%</b>                            |

**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:**

 11/15/2020  
Superintendent Date

 1-19-21  
BOCC Chair Date

Section I Attachment I.B.2 Chapel Hill-Carrboro City School Capacity (Elementary, Middle, & High)  
(2020-21  
(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 13, 2020 - November 14, 2021

**Capacity and Membership Submittal Date:** November 13, 2020

| High School      | Square Feet    | 2016-2017<br>Requested<br>Capacity | 2017-2018<br>Requested<br>Capacity | 2018-2019<br>Requested<br>Capacity | 2019-2020<br>Requested<br>Capacity | 2020-2021<br>Requested<br>Capacity | Justification<br>Footnote # | Membership<br>(referenced<br>school year) | Percentage of<br>Capacity/Level<br>of Service |
|------------------|----------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|-----------------------------|---|---|
| Carrboro         | 148,023        | 800                                | 800                                | 800                                | 800                                | 800                                |                             | 838                                       | 105%  |
| Chapel Hill      | 278,508        | 1,520                              | 1,520                              | 1,520                              | 1,520                              | 1,620                              | *                           | 1,529                                     | 94%   |
| East Chapel Hill | 259,869        | 1,515                              | 1,515                              | 1,515                              | 1,515                              | 1,515                              |                             | 1,516                                     | 100%  |
| Phoenix Acad.    | 5,207          | 40                                 | 40                                 | 40                                 | 40                                 | 40                                 |                             | 49  | 123%  |
| <b>Total</b>     | <b>691,607</b> | <b>3,875</b>                       | <b>3,875</b>                       | <b>3,875</b>                       | <b>3,875</b>                       | <b>3,975</b>                       |                             | <b>3,932</b>                              | <b>98.9%</b>                                  |

**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:** 100 seats added to CHHS for the 2020-21 school year. Total square feet 278,508.

**Capacity and Membership Certification:**

 11/15/2020  
Superintendent Date

 1-19-21  
BOCC Chair Date

## Section I

## Attachment I.B.3 Orange County School Capacity (Elementary, Middle, &amp; High)

(2021-22)

(Page 1 of 3)

Attachment 1

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

|   |
|---|
| School District: Orange County Schools                    |
| SAPFO CAPS Year: November 15, 2021 - November 14, 2022    |
| Capacity and Membership Submittal Date: November 15, 2021 |

| Elementary School | Square Feet    | 2017-2018 Requested Capacity | 2018-2019 Requested Capacity | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|-------------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| River Park        | 70,812         | 565                          | 565                          | 502                          | 502                          | 502                          |                          | 557                                 | 111.0%                                  |
| Central           | 52,492         | 455                          | 455                          | 428                          | 428                          | 428                          |                          | 299                                 | 69.9%                                   |
| Eftland           | 64,316         | 497                          | 497                          | 455                          | 455                          | 455                          |                          | 482                                 | 105.9%                                  |
| Grady Brown       | 74,016         | 544                          | 544                          | 490                          | 490                          | 490                          |                          | 411                                 | 83.9%                                   |
| Hillsborough      | 51,106         | 471                          | 471                          | 420                          | 420                          | 420                          |                          | 422                                 | 100.5%                                  |
| New Hope          | 100,164        | 586                          | 586                          | 526                          | 526                          | 526                          |                          | 533                                 | 101.3%                                  |
| Pathways          | 85,282         | 576                          | 576                          | 540                          | 540                          | 540                          |                          | 319                                 | 59.1%                                   |
| <b>Total</b>      | <b>498,188</b> | <b>3,694</b>                 | <b>3,694</b>                 | <b>3,361</b>                 | <b>3,361</b>                 | <b>3,361</b>                 |                          | <b>3,023</b>                        | <b>89.9%</b>                            |

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

2. During the 2021-2022 school year, the Orange County Schools opened the OCS Online Academy as alternative learning option for students in grades K-12 as a result of the COVID-19 global pandemic. The membership counts for November 15, 2021 include the online students who are still assigned a base physical school within the district as these students have the opportunity to return to their assigned school during the school year. Physical classroom capacities must be reserved in order to ensure these students are able to return to their assigned school without space limitations. The membership counts for these online students as of November 15, 2021 are: Total 173 students in Elementary (68), Middle (48), and High (57).

**Justification:****Capacity and Membership Certification:**

*Monique Felder* *11/18/21*  
 Superintendent Date

*Renee A. Price* *12/14/21*  
 BOCC Chair Date



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

|   |
|---|
| School District: Orange County Schools                    |
| SAPFO CAPS Year: November 15, 2021 - November 14, 2022    |
| Capacity and Membership Submittal Date: November 15, 2021 |

| Middle School | Square Feet | 2017-2018 Requested Capacity | 2018-2019 Requested Capacity | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|---------------|-------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| A.L.          | 136,000     | 740                          | 740                          | 740                          | 740                          | 740                          |                          | 654                                 | 88.4%                                   |
| Orange        | 107,620     | 726                          | 726                          | 726                          | 726                          | 726                          |                          | 540                                 | 74.4%                                   |
| Gravelly Hill | 123,000     | 700                          | 700                          | 700                          | 700                          | 700                          |                          | 462                                 | 66.0%                                   |
|               |             |                              |                              |                              |                              |                              |                          |                                     |   |
| Total         | 366,620     | 2,166                        | 2,166                        | 2,166                        | 2,166                        | 2,166                        |                          | 1,656                               | 76.5%                                   |

**Special Note(s):** 1. For the November 15, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planners and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by (1) the School CIP or (2) an amended version of this form that is certified by the BOCC. 2. During the 2021-2022 school year, the Orange County Schools opened the OCS Online Academy as alternative learning option for students in grades K-12 as a result of the COVID-19 global pandemic. The membership counts for November 15, 2021 include the online students who are still assigned a base physical school within the district as these students have the opportunity to return to their assigned school during the school year. Physical classroom capacities must be reserved in order to ensure these students are able to return to their assigned school without space limitations. The membership counts for these online students as of November 15, 2021 are: Total 173 students in Elementary (68), Middle (48), and High (57).

**Justification:****Capacity and Membership Certification:**

Marlene Filder 11/18/88  
Superintendent Date

Renée A. Price 12/14/12  
BOEC Chair Date

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

|   |
|---|
| School District: Orange County Schools                    |
| SAPFO CAPS Year: November 15, 2021 - November 14, 2022    |
| Capacity and Membership Submittal Date: November 15, 2021 |


| High School  | Square Feet    | 2017-2018 Requested Capacity | 2018-2019 Requested Capacity | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|--------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Cedar Ridge  | 256,900        | 1,000                        | 1,000                        | 1,000                        | 1,000                        | 1,500                        | 3                        | 1,065                               | 71.0%                                   |
| Orange       | 213,509        | 1,399                        | 1,399                        | 1,399                        | 1,399                        | 1,399                        |                          | 1,373                               | 98.1%                                   |
| Partnership  | 6,600          | 40                           | 40                           | 40                           | 40                           | 40                           |                          | 34                                  | 85.0%                                   |
| <b>Total</b> | <b>477,009</b> | <b>2,439</b>                 | <b>2,439</b>                 | <b>2,439</b>                 | <b>2,439</b>                 | <b>2,939</b>                 |                          | <b>2,472</b>                        | <b>84.1%</b>                            |

**Special Note(s):** 1. For the November 15, 2002 base year the board accepted the superintendent-certified capacities as part of the School Facilities Task Force review and 2003 Planners and School Representative Technical Advisory Committee Report. These capacities will remain effective until changed by (1) the School CIP or (2) an amended version of this form that is certified by the BOCC.  
 2. During the 2021-2022 school year, the Orange County Schools opened the OCS Online Academy as alternative learning option for students in grades K-12 as a result of the COVID-19 global pandemic. The membership counts for November 15, 2021 include the online students who are still assigned a base physical school within the district as these students have the opportunity to return to their assigned school during the school year. Physical classroom capacities must be reserved in order to ensure these students are able to return to their assigned school without space limitations. The membership counts for these online students as of November 15, 2021 are: Total 173 students in Elementary (68), Middle (48), and High (57).

**Justification:** 3. The capacity at Cedar Ridge High School has increased from 1,000 students to 1,500 students due to the opening of a new 50,000 square foot classroom addition. This increases the total square footage from 206,900 to 256,900 square feet.

#### Capacity and Membership Certification:

                      11/18/21  
 Superintendent Date

 12/14/21  
 BOCC Chair Date

Section 1 Attachment I.B.4 Chapel Hill-Carrboro City School Capacity (Elementary, Middle, & High)  
(2021-22)  
(Page 1 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, 2021 - November 14, 2022  
Capacity and Membership Submittal Date: November 15, 2021

| Elementary School | Square Feet    | 2017-2018 Requested Capacity | 2018-2019 Requested Capacity | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|-------------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Carrboro          | 60,832         | 533                          | 518                          | 518                          | 518                          | 518                          |                          | 494                                 | 95.4%                                   |
| Ephesus           | 66,952         | 448                          | 436                          | 436                          | 436                          | 436                          |                          | 341                                 | 78.2%                                   |
| Estes Hills       | 56,299         | 527                          | 516                          | 516                          | 516                          | 516                          |                          | 353                                 | 68.4%                                   |
| FP Graham         | 66,689         | 538                          | 522                          | 522                          | 522                          | 522                          |                          | 507                                 | 97.1%                                   |
| Glenwood          | 50,764         | 423                          | 412                          | 412                          | 412                          | 412                          |                          | 422                                 | 102.4%                                  |
| McDougle          | 98,000         | 564                          | 548                          | 548                          | 548                          | 548                          |                          | 462                                 | 84.3%                                   |
| Morris Grove      | 90,221         | 585                          | 568                          | 568                          | 568                          | 568                          |                          | 461                                 | 81.2%                                   |
| Northside         | 99,500         | 585                          | 568                          | 568                          | 568                          | 568                          |                          | 380                                 | 66.9%                                   |
| Rashkis           | 95,729         | 585                          | 568                          | 568                          | 568                          | 568                          |                          | 419                                 | 73.8%                                   |
| Scroggs           | 90,980         | 575                          | 558                          | 558                          | 558                          | 558                          |                          | 395                                 | 70.8%                                   |
| Seawell           | 52,896         | 466                          | 450                          | 450                          | 450                          | 450                          |                          | 504                                 | 112.0%                                  |
| <b>Total</b>      | <b>828,862</b> | <b>5,829</b>                 | <b>5,664</b>                 | <b>5,664</b>                 | <b>5,664</b>                 | <b>5,664</b>                 |                          | <b>4,738</b>                        | <b>83.7%</b>                            |

**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:**

*Nathan* 11/15/2021  
Superintendent Date

*Leslie A. Price* 12/14/21  
BOCC Chair Date



Section I Attachment I.B.4 Chapel Hill-Carrboro City School Capacity (Elementary, Middle, & High)  
(2021-22)  
(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, 2021 - November 14, 2022  
Capacity and Membership Submittal Date: November 15, 2021

| Middle School | Square Feet    | 2017-2018 Requested Capacity | 2018-2019 Requested Capacity | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|---------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Culbreth      | 122,467        | 774                          | 774                          | 774                          | 774                          | 774                          |                          | 668                                 | 86%                                     |
| McDougle      | 136,221        | 732                          | 732                          | 732                          | 732                          | 732                          |                          | 754                                 | 103%                                    |
| Phillips      | 109,498        | 706                          | 706                          | 706                          | 706                          | 706                          |                          | 661                                 | 94%                                     |
| Smith         | 128,764        | 732                          | 732                          | 732                          | 732                          | 732                          |                          | 719                                 | 98%                                     |
| <b>Total</b>  | <b>496,950</b> | <b>2,944</b>                 | <b>2,944</b>                 | <b>2,944</b>                 | <b>2,944</b>                 | <b>2,944</b>                 |                          | <b>2,802</b>                        | <b>95.2%</b>                            |

**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:**

*Nathan L. H. [Signature]* 11/15/2021  
Superintendent Date

*Renée A. Price [Signature]* 12/14/21  
BOCC Chair Date

Section I Attachment I.B.4 Chapel Hill-Carrboro City School Capacity (Elementary, Middle, & High)  
(2021-22)  
(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, 2021 - November 14, 2022

Capacity and Membership Submittal Date: November 15, 2021

| High School      | Square Feet    | 2017-2018 Requested Capacity | 2018-2019 Requested Capacity | 2019-2020 Requested Capacity | 2020-2021 Requested Capacity | 2021-2022 Requested Capacity | Justification Footnote # | Membership (referenced school year) | Percentage of Capacity/Level of Service |
|------------------|----------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|--------------------------|-------------------------------------|---|
| Carrboro         | 148,023        | 800                          | 800                          | 800                          | 800                          | 800                          |                          | 849                                 | 106%                                    |
| Chapel Hill      | 241,111        | 1,520                        | 1,520                        | 1,520                        | 1,620                        | 1,620                        |                          | 1,515                               | 94%                                     |
| East Chapel Hill | 259,869        | 1,515                        | 1,515                        | 1,515                        | 1,515                        | 1,515                        |                          | 1,484                               | 98%                                     |
| Phoenix Acad.    | 5,207          | 40                           | 40                           | 40                           | 40                           | 40                           |                          | 92                                  | 230%                                    |
| <b>Total</b>     | <b>654,210</b> | <b>3,875</b>                 | <b>3,875</b>                 | <b>3,875</b>                 | <b>3,975</b>                 | <b>3,975</b>                 |                          | <b>3,940</b>                        | <b>99.1%</b>                            |

**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:** At Phoenix Academy, 57 of the 90 students are in our Virtual Learning Academy; only 33 students attend in person; 33/40 is 82.5%.

**Capacity and Membership Certification:**

 11/15/2021  
Superintendent Date

 12/14/21  
BOCC Chair Date



## C. Membership Date

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

|  |  |
|--|--|
| <b>Chapel Hill-Carrboro City School District</b><br>November 15 of each year | <b>Standard for:</b><br><b>Orange County School District</b><br>November 15 of each year |
|--|--|
4. ***Analysis of Existing Conditions:***  
This will be analyzed in the future years to determine if it is an exemplary date.
5. ***Recommendation:***

|   |   |
|---|---|
| <b>Chapel Hill-Carrboro City School District</b><br>No change at this time. | <b>Recommendation:</b><br><b>Orange County School District</b><br>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:***

|  |                                      |
|--|--------------------------------------|
| <b>Chapel Hill-Carrboro City School District</b> | <b>Orange County School District</b> |
| 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, 2022.
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:***

### ***Standard for:***

#### **Chapel Hill-Carrboro City School District**

#### **Orange County School District**

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

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

Performance of the models is monitored each year. The value of a projection model is in its prediction of school level capacities at least three years in advance of capacity shortfalls so the annual Capital Investment Plan (CIP) updates can respond proactively with siting, design, and construction. Attachment II.B.1 includes a description of each model. Attachment II.B.3 shows the performance of the models for the 2021-22 school year from the prior year projection.

### 5. ***Recommendation:***

Analysis on the accuracy of the results is showing that some models have better results in one district while others have better results in the other district. The historic growth rate is recorded by the models, but projected future growth is more difficult to accurately quantify. In all areas of the county, proposed growth is not included in the SAPFO projection system until actual students begin enrollment. The system is updated in November of each year, becoming part of the historical projection base.



## STUDENT MEMBERSHIP PROJECTIONS

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

**Orange County School District  
School Membership 2020-2021 School Year (November 13, 2020)**

|                   | 11/15/19<br>Actual<br>2019-20 | 2020 Report<br>Projection for<br>2020-21 | 11/13/20<br>Actual<br>2020-21 | Change between actual<br>Nov 2019 - Nov 2020 |
|-------------------|-------------------------------|--|-------------------------------|--|
| <b>Elementary</b> | <b>3232</b>                   |  | <b>3047</b>                   | <b>- 185</b>                                 |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 3241                                     | H194                          |  |
| OCP               |                               | 3248                                     | H201                          |  |
| 10C               |                               | 3275                                     | H228                          |  |
| 5C                |                               | 3285                                     | H238                          |  |
| 3C                |                               | 3286                                     | H239                          |  |
| <b>Average</b>    |                               | <b>3267</b>                              | <b>H220</b>                   |  |
|                   |                               |  |                               |  |
|                   | <b>11/15/19</b>               |  | <b>11/13/20</b>               |  |
| <b>Middle</b>     | <b>1763</b>                   |  | <b>1654</b>                   | <b>- 109</b>                                 |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 1768                                     | H114                          |  |
| OCP               |                               | 1773                                     | H119                          |  |
| 10C               |                               | 1709                                     | H55                           |  |
| 5C                |                               | 1702                                     | H48                           |  |
| 3C                |                               | 1686                                     | H32                           |  |
| <b>Average</b>    |                               | <b>1728</b>                              | <b>H74</b>                    |  |
|                   |                               |  |                               |  |
|                   | <b>11/15/19</b>               |  | <b>11/13/20</b>               |  |
| <b>High</b>       | <b>2397</b>                   |  | <b>2381</b>                   | <b>- 16</b>                                  |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 2404                                     | H23                           |  |
| OCP               |                               | 2412                                     | H31                           |  |
| 10C               |                               | 2398                                     | H17                           |  |
| 5C                |                               | 2389                                     | H8                            |  |
| 3C                |                               | 2401                                     | H20                           |  |
| <b>Average</b>    |                               | <b>2401</b>                              | <b>H20</b>                    |  |
|                   |                               |  |                               |  |
| <b>Totals</b>     | <b>11/15/19</b>               |  | <b>11/13/20</b>               |  |
| Elementary        | 3232                          |  | 3047                          |  |
| Middle            | 1763                          |  | 1654                          |  |
| High              | <u>2397</u>                   |  | <u>2381</u>                   |  |
| <b>Total</b>      | <b>7392</b>                   |  | <b>7082</b>                   | <b>- 310</b>                                 |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 7413                                     | H331                          |  |
| OCP               |                               | 7433                                     | H351                          |  |
| 10C               |                               | 7382                                     | H300                          |  |
| 5C                |                               | 7376                                     | H294                          |  |
| 3C                |                               | 7373                                     | H291                          |  |
| <b>Average</b>    |                               | <b>7396</b>                              | <b>H314</b>                   |  |

H means High  
L means Low

**Orange County School District  
School Membership 2020-2021 School Year (November 13, 2020)**

**Statistical Findings**

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

**Elementary School Level**

- Projections were all high, ranging from 194 students to 239 students above actual membership. On average, the projections were 220 students higher than the actual membership.
- The membership actually decreased by 185 students between November 16, 2019 and November 13, 2020.

**Middle School Level**

- Projections were all high, ranging from 32 students to 119 students above actual membership. On average, the projections were 74 students higher than the actual membership.
- The membership actually decreased by 109 students between November 16, 2019 and November 13, 2020.

**High School Level**

- Projections were all high, ranging from 8 students to 31 students above actual membership. On average, the projections were 20 students higher than the actual membership.
- The membership actually decreased by 16 students between November 16, 2019 and November 13, 2020.

**TOTAL**

- The totals of all school level projections were all high, ranging from 291 students to 351 students above actual membership. On average, the projections were 314 students higher than the actual membership.
- The membership decreased in total by 310 students, which is the sum of -185 at Elementary, -109 at Middle, and -16 at High.

**Chapel Hill-Carrboro City School District**  
**School Membership 2020-2021 School Year (November 13, 2020)**

|                   | 11/15/19<br>Actual<br>2019-20 | 2020 Report<br>Projection for<br>2020-21 | 11/13/20<br>Actual<br>2020-21 | Change between actual<br>Nov 2019 - Nov 2020 |
|-------------------|-------------------------------|--|-------------------------------|--|
| <b>Elementary</b> | <b>5363</b>                   |  | <b>4893</b>                   | <b>- 470</b>                                 |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 5398                                     | H505                          |  |
| OCP               |                               | 5378                                     | H485                          |  |
| 10C               |                               | 5349                                     | H456                          |  |
| 5C                |                               | 5331                                     | H438                          |  |
| 3C                |                               | 5322                                     | H429                          |  |
| <b>Average</b>    |                               | <b>5356</b>                              | <b>H463</b>                   |  |
|                   | <b>11/15/19</b>               |  | <b>11/13/20</b>               |  |
| <b>Middle</b>     | <b>3044</b>                   |  | <b>2917</b>                   | <b>- 127</b>                                 |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 3064                                     | H147                          |  |
| OCP               |                               | 3055                                     | H138                          |  |
| 10C               |                               | 3031                                     | H114                          |  |
| 5C                |                               | 3033                                     | H116                          |  |
| 3C                |                               | 3042                                     | H125                          |  |
| <b>Average</b>    |                               | <b>3045</b>                              | <b>H128</b>                   |  |
|                   | <b>11/15/19</b>               |  | <b>11/13/20</b>               |  |
| <b>High</b>       | <b>3940</b>                   |  | <b>3932</b>                   | <b>- 8</b>                                   |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 3966                                     | H34                           |  |
| OCP               |                               | 3959                                     | H27                           |  |
| 10C               |                               | 3981                                     | H49                           |  |
| 5C                |                               | 3998                                     | H66                           |  |
| 3C                |                               | 4022                                     | H90                           |  |
| <b>Average</b>    |                               | <b>3985</b>                              | <b>H53</b>                    |  |
| <b>Totals</b>     | <b>11/15/19</b>               |  | <b>11/13/20</b>               |  |
| Elementary        | 5363                          |  | 4893                          |  |
| Middle            | 3044                          |  | 2917                          |  |
| High              | 3940                          |  | 3932                          |  |
| <b>Total</b>      | <b>12,347</b>                 |  | <b>11,742</b>                 | <b>- 605</b>                                 |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 12,428                                   | H686                          |  |
| OCP               |                               | 12,392                                   | H650                          |  |
| 10C               |                               | 12,361                                   | H619                          |  |
| 5C                |                               | 12,362                                   | H620                          |  |
| 3C                |                               | 12,386                                   | H644                          |  |
| <b>Average</b>    |                               | <b>12,386</b>                            | <b>H644</b>                   |  |

H means High  
L means Low



**Chapel Hill-Carrboro City School District  
School Membership 2020-2021 School Year (November 13, 2020)**

**Statistical Findings**

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

**Elementary School Level**

- Projections were all high ranging from 429 students to 505 students above actual membership. On average, the projections were 463 students higher than the actual membership.
- The actual membership decreased by 470 students between November 16, 2019 and November 13, 2020.

**Middle School Level**

- Projections were all high, ranging from 114 students to 147 students above actual membership. On average, the projections were 128 students higher than the actual membership.
- The actual membership decreased by 127 students between November 16, 2019 and November 13, 2020.

**High School Level**

- Projections were all high, ranging from 27 students to 90 students above actual membership. On average, the projections were 53 students higher than the actual membership.
- The actual membership decreased by 8 students between November 16, 2019 and November 13, 2020.

**TOTAL**

- The totals of all school level projections were all high, ranging from 619 students to 686 students above actual membership. On average, the projections were 644 students higher than the actual membership.
- The membership decreased in total by 605 students, which is the sum of -470 at Elementary, -127 at Middle, and -8 at High.



**Orange County School District  
School Membership 2021-2022 School Year (November 15, 2021)**

|                   | 11/13/20<br>Actual<br>2020-21 | 2021 Report<br>Projection for<br>2021-22 | 11/15/21<br>Actual<br>2021-22 | Change between actual<br>Nov 2020 - Nov 2021 |
|-------------------|-------------------------------|--|-------------------------------|--|
| <b>Elementary</b> | <b>3047</b>                   |  | <b>3023</b>                   | <b>- 24</b>                                  |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 3036                                     | H13                           |  |
| OCP               |                               | 3128                                     | H105                          |  |
| 10C               |                               | 2968                                     | L55                           |  |
| 5C                |                               | 2966                                     | L57                           |  |
| 3C                |                               | 2960                                     | L63                           |  |
| <b>Average</b>    |                               | <b>3011</b>                              | <b>L12</b>                    |  |
|                   | <b>11/13/20</b>               |  | <b>11/15/21</b>               |  |
| <b>Middle</b>     | <b>1654</b>                   |  | <b>1656</b>                   | <b>+2</b>                                    |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 1648                                     | L 8                           |  |
| OCP               |                               | 1683                                     | H27                           |  |
| 10C               |                               | 1630                                     | L 26                          |  |
| 5C                |                               | 1613                                     | L 43                          |  |
| 3C                |                               | 1598                                     | L 58                          |  |
| <b>Average</b>    |                               | <b>1634</b>                              | <b>L 22</b>                   |  |
|                   | <b>11/13/20</b>               |  | <b>11/15/21</b>               |  |
| <b>High</b>       | <b>2381</b>                   |  | <b>2472</b>                   | <b>+91</b>                                   |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 2372                                     | L100                          |  |
| OCP               |                               | 2306                                     | L166                          |  |
| 10C               |                               | 2387                                     | L85                           |  |
| 5C                |                               | 2372                                     | L100                          |  |
| 3C                |                               | 2389                                     | L83                           |  |
| <b>Average</b>    |                               | <b>2365</b>                              | <b>L107</b>                   |  |
| <b>Totals</b>     | <b>11/13/20</b>               |  | <b>11/15/21</b>               |  |
| Elementary        | 3047                          |  | 3023                          |  |
| Middle            | 1654                          |  | 1656                          |  |
| High              | <u>2381</u>                   |  | <u>2472</u>                   |  |
| <b>Total</b>      | <b>7082</b>                   |  | <b>7151</b>                   | <b>+69</b>                                   |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 7056                                     | L95                           |  |
| OCP               |                               | 7117                                     | L34                           |  |
| 10C               |                               | 6985                                     | L166                          |  |
| 5C                |                               | 6951                                     | L200                          |  |
| 3C                |                               | 6947                                     | L204                          |  |
| <b>Average</b>    |                               | <b>7010</b>                              | <b>L141</b>                   |  |

H means High  
L means Low

**Orange County School District  
School Membership 2021-2022 School Year (November 15, 2021)**

**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 63 students below to 105 students above actual membership. On average, the projections were 12 students below actual membership.
- The membership actually decreased by 24 students between November 15, 2020 and November 14, 2021.

**Middle School Level**

- Projections were mixed, ranging from 58 students below to 27 students above actual membership. On average, the projections were 22 students below actual membership.
- The membership actually increase by 2 students between November 15, 2020 and November 14, 2021.

**High School Level**

- Projections were all low, ranging from 166 students to 83 students below actual membership. On average, the projections were 107 students below actual membership.
- The membership actually increased by 91 students between November 15, 2020 and November 14, 2021.

**TOTAL**

- The totals of all school level projections were all low, ranging from 34 to 204 students below actual membership. On average, the projections were 141 students below actual membership.
- The membership increased in total by 69 students, which is the sum of -24 at Elementary, +2 at Middle, and +91 at High.

**Chapel Hill-Carrboro City School District  
School Membership 2021-2022 School Year (November 15, 2021)**

|                   | 11/13/20<br>Actual<br>2020-21 | 2021 Report<br>Projection for<br>2021-22 | 11/15/21<br>Actual<br>2021-22 | Change between actual<br>Nov 2020 - Nov 2021 |
|-------------------|-------------------------------|--|-------------------------------|--|
| <b>Elementary</b> | <b>4893</b>                   |  | <b>4738</b>                   | <b>- 155</b>                                 |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 4885                                     | H147                          |  |
| OCP               |                               | 5085                                     | H347                          |  |
| 10C               |                               | 4732                                     | L6                            |  |
| 5C                |                               | 4695                                     | L43                           |  |
| 3C                |                               | 4644                                     | L94                           |  |
| <b>Average</b>    |                               | <b>4808</b>                              | <b>H70</b>                    |  |
|                   |                               |  |                               |  |
|                   | <b>11/13/20</b>               |  | <b>11/15/21</b>               |  |
| <b>Middle</b>     | <b>2917</b>                   |  | <b>2802</b>                   | <b>-115</b>                                  |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 2912                                     | H110                          |  |
| OCP               |                               | 2890                                     | H88                           |  |
| 10C               |                               | 2860                                     | H58                           |  |
| 5C                |                               | 2859                                     | H57                           |  |
| 3C                |                               | 2846                                     | H44                           |  |
| <b>Average</b>    |                               | <b>2874</b>                              | <b>H72</b>                    |  |
|                   |                               |  |                               |  |
|                   | <b>11/13/20</b>               |  | <b>11/15/21</b>               |  |
| <b>High</b>       | <b>3932</b>                   |  | <b>3940</b>                   | <b>+ 8</b>                                   |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 3926                                     | L14                           |  |
| OCP               |                               | 3796                                     | L144                          |  |
| 10C               |                               | 3925                                     | L15                           |  |
| 5C                |                               | 3939                                     | L1                            |  |
| 3C                |                               | 3933                                     | L7                            |  |
| <b>Average</b>    |                               | <b>3904</b>                              | <b>L36</b>                    |  |
|                   |                               |  |                               |  |
| <b>Totals</b>     | <b>11/13/20</b>               |  | <b>11/15/21</b>               |  |
| Elementary        | 4893                          |  | 4738                          |  |
| Middle            | 2917                          |  | 2802                          |  |
| High              | <u>3932</u>                   |  | <u>3940</u>                   |  |
| <b>Total</b>      | <b>11,742</b>                 |  | <b>11,480</b>                 | <b>- 262</b>                                 |
| <b>Model</b>      |                               |  | <b>Projection is</b>          |  |
| T                 |                               | 11,723                                   | H243                          |  |
| OCP               |                               | 11,771                                   | H291                          |  |
| 10C               |                               | 11,517                                   | H37                           |  |
| 5C                |                               | 11,493                                   | H13                           |  |
| 3C                |                               | 11,423                                   | H57                           |  |
| <b>Average</b>    |                               | <b>11,586</b>                            | <b>H106</b>                   |  |

H means High  
L means Low

**Chapel Hill-Carrboro City School District  
School Membership 2021-2022 School Year (November 15, 2021)**

**Statistical Findings**

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

**Elementary School Level**

- Projections were all mixed ranging from 94 students below to 347 students above actual membership. On average, the projections were 70 students higher than the actual membership.
- The actual membership decreased by 155 students between November 15, 2020 and November 14, 2021.

**Middle School Level**

- Projections were all high, ranging from 44 students to 110 students above actual membership. On average, the projections were 72 students higher than the actual membership.
- The actual membership decreased by 115 students between November 15, 2020 and November 14, 2021.

**High School Level**

- Projections were all low, ranging from 1 students to 144 students below actual membership. On average, the projections were 36 students below actual membership.
- The actual membership increased by 8 students between November 15, 2020 and November 14, 2021.

**TOTAL**

- The totals of all school level projections were all high, ranging from 13 students to 291 students above actual membership. On average, the projections were 106 students higher than the actual membership.
- The membership decreased in total by 262 students, which is the sum of -155 at Elementary, -115 at Middle, and +8 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:***

|   |   |
|---|---|
| <b>Chapel Hill-Carrboro City School District</b><br>The 5 model average discussed in Section II.B (Student Projection Methodology). See Attachment II.C.4 | <b>Standard for:</b><br><b>Orange County School District</b><br>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 for both districts in the 10-year projection period. Attachment II.C.3 and Attachment II.C.4 show year-by-year percent growth and projected level of service (LOS). The projection models were updated using current (November 15, 2021) memberships. Ten years of student membership were projected thereafter.

### Chapel Hill-Carrboro City School District

#### Elementary

The previous year (2020-21) projections for November 2021 at this level were overestimated by 70 students. The actual membership decreased by 155 students. Over the previous ten years, this level has shown varying increases and decreases in growth rates. Following a significant increase (168 students) in 2011-12, this level has experienced a decrease in six out of the following nine school years. The level experienced a significant decrease in 2020-21 due to impacts from COVID. Growth rates during the past ten years have ranged from -8.76% to



## *Section II*

+3.17%. The district's eleventh elementary school, Northside Elementary School, opened in 2013. Capacity was decreased in 2017-18 due to changes in class size averages for kindergarten to third grade by the North Carolina State Legislature. The need for an additional elementary school is not anticipated in the 10-year projection period. This is similar to last year's projections.

Although not included in SAPFO school capacity or membership numbers, Pre-K programs continue to impact operations at District elementary schools where Pre-K programs exist. CHCCS reported 222 Pre-K students for the 2021-22 school year. Specific impacts of Pre-K programs at the elementary school level continue to be reviewed and discussed .

### **Middle**

The previous year (2020-21) projections for November 2021 for this level were overestimated by 72 students. The actual membership decreased by 115 students. Over the previous ten years, this level has shown varying increases before experiencing decreases in 2015-16 and 2016-17. Following these decreases, membership increased the last three school years before experiencing a decrease in 2020-21 due to impacts from COVID. Growth rates during this time period have ranged from -4.17% to +3.78%. Capacity was increased in 2014-15 with the opening of the Culbreth Middle School science wing. The need for an additional middle school is not anticipated in the 10-year projection period. This is similar to last year's projections.

### **High School**

The previous year (2020-21) projections for November 2021 for this level were underestimated by 36 students. The actual membership increased by 8 students. Over the previous ten years, growth has been variable with decreases in membership in only four of the last ten years. Growth rates during this time period have ranged from -0.90 to +4.39%. The need for additional high school capacity at Carrboro High School is not anticipated in the 10-year projection period. This is similar to last year's projections.

### ***Additional Information for Chapel Hill-Carrboro City School District***

Following the economic downturn (2011-14), there has been an increase in residential projects, specifically multifamily development, in the Town of Chapel Hill. As previously stated, proposed growth is not directly and immediately included in the SAPFO projection system until actual students begin enrollment. However, proposed student growth resulting from new

## *Section II*

development is directly accounted for through the CAPS test. The CAPS test is conducted during the approval process at a certain stage and this step does project development impacts against rated capacity. Once students are enrolled in a school year, through annual reporting of student membership numbers, 10-year student projections can be updated to display future capacity needs in time to efficiently plan for future school construction requests. SAPFOTAC will continue to monitor and evaluate the demand and growth of residential development in Chapel Hill and Carrboro as well as its effect on student membership rates.

### **Orange County School District**

#### **Elementary**

The previous year (2020-21) projections for November 2021 at this level were underestimated by 12 students. Actual membership decreased by 24 students. Over the previous ten years, this level experienced positive growth before experiencing decreases in 2014-15, 2016-17, and 2017-18. Following these decreases, this level experienced increases before experiencing a decrease in 2020-21 due to impacts from COVID. Growth rates during this period have ranged from -5.72% to +1.92%. Capacity was decreased in 2017-18 due to changes in class size averages for kindergarten to third grade by the North Carolina State Legislature. The need for an additional Elementary School is not anticipated in the 10-year projection period. This is similar to last year's projections.

Although not included in SAPFO school capacity or membership numbers, Pre-K programs continue to impact operations at District elementary schools where Pre-K programs exist. OCS reported 125 Pre-K students for the 2021-22 school year. Specific impacts of Pre-K programs at the elementary school level continue to be reviewed and discussed.

#### **Middle**

The previous year (2020-21) projections for November 2021 for this level were underestimated by 22 students. The actual membership increased by 2 students. Over the previous ten years, growth has varied widely with decreases in student membership in five of the ten school years. Growth rates during this period have ranged from -6.18% to +3.74%. The need for an additional Middle School is not anticipated in the 10-year projection period. This is similar to last year's projections.

## *Section II*

### **High School**

The previous year (2020-21) projections for November 2021 for this level were underestimated by 107 students. The actual membership increased by 91 students. This school level has experienced decreases in five out of the ten previous school years. Growth rates during this period ranged from -3.93% to 4.58%. In 2012-13 student membership increased by 32 while capacity decreased by 119 at Orange County High School as a result of a N.C. Department of Public Instruction (DPI) study. Due to renovations at Cedar Ridge High School, this level experienced an increase in capacity of 500 seats. The need for an additional high school is not anticipated in the 10-year projection period.

### ***Additional Information for Orange County School District***

The City of Mebane lies partially within Orange County and students within the Orange County portion of Mebane attend Orange County Schools. However, the City of Mebane is not a party to the SAPFO agreement and therefore does not require that CAPS (Certificate of Adequate Public Schools) be issued prior to development approvals. Following the economic downturn (2011-14), there has been an increase in approved and undeveloped residential development in the City of Mebane and the Town of Hillsborough. However, the residential growth that has occurred in the recent past within Mebane's and Hillsborough's jurisdiction has yet to be seen with OCS student membership numbers and fully realized into the historically based projection methods due to the recession, charter schools, and possibly new family dynamics affecting family size. SAPFOTAC will continue monitoring and evaluating the demand and growth of residential development in Mebane and Hillsborough as well as its effect on student membership rates.

Currently, there are two Charter Schools located in the Town of Hillsborough, which continue to have an effect on OCS membership numbers. Charter schools are not included as part of the SAPFO Annual Report and, as a result, their membership and capacity are not included in future projections. However, the SAPFOTAC does monitor charter schools and their effect on student enrollment at both school districts.

### ***5. Recommendation:***

Use statistics as noted in 3 above



## OCS Student Projections (1) (4)

| Elementary   | School Year | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 |
|--|-------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Actual   |             | 3,211   | 3,285   | 3,348   | 3,403   | 3,433   | 3,268   | 3,318   | 3,263   | 3,183   | 3,230   | 3,222   | 3,047   |         |         |         |         |         |         |         |         |         |         |
| Teacher (2)  |             |         |         |         |         |         |         |         |         |         |         |         |         | 3,036   | 3,024   | 3,013   | 3,002   | 2,990   | 2,978   | 2,967   | 2,956   | 2,945   | 2,935   |
| OC Planning  |             |         |         |         |         |         |         |         |         |         |         |         |         | 3,129   | 3,144   | 3,156   | 3,168   | 3,180   | 3,192   | 3,205   | 3,217   | 3,230   | 3,246   |
| 10 Year Growth   |             |         |         |         |         |         |         |         |         |         |         |         |         | 2,888   | 2,843   | 2,827   | 2,897   | 2,881   | 2,810   | 2,838   | 2,868   | 2,898   | 3,026   |
| 5 Year Growth  |             |         |         |         |         |         |         |         |         |         |         |         |         | 2,888   | 2,838   | 2,817   | 2,883   | 2,883   | 2,881   | 2,820   | 2,848   | 2,879   | 3,036   |
| 3 Year Growth  |             |         |         |         |         |         |         |         |         |         |         |         |         | 2,680   | 2,823   | 2,897   | 2,955   | 2,931   | 2,859   | 2,886   | 2,917   | 2,948   | 3,076   |
| Average  |             |         |         |         |         |         |         |         |         |         |         |         |         | 3,011   | 2,994   | 2,982   | 2,982   | 2,949   | 2,996   | 2,964   | 3,002   | 3,019   | 3,039   |
| Annual Change - Increase (Decrease) in Actual & Projected Membership |             | 46      | 74      | 63      | 55      | 30      | (114)   | 59      | (25)    | (119)   | 22      | 27      | (165)   | (236)   | (177)   | (152)   | (20)    | (113)   | 17      | 16      | 18      | 16      | 28      |
| Capacity - 100% Level of Service                                     |             | 3,694   | 3,694   | 3,694   | 3,694   | 3,694   | 3,694   | 3,694   | 3,694   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      |             | (483)   | (409)   | (346)   | (291)   | (261)   | (426)   | (379)   | (431)   | (179)   | (150)   | (129)   | (244)   | (260)   | (267)   | (279)   | (299)   | (412)   | (295)   | (271)   | (259)   | (242)   | (220)   |
| 100% Level of Service  |             | 3,679   | 3,679   | 3,679   | 3,679   | 3,679   | 3,679   | 3,679   | 3,679   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      |             | (619)   | (594)   | (521)   | (476)   | (449)   | (720)   | (681)   | (896)   | (249)   | (224)   | (287)   | (483)   | (516)   | (536)   | (547)   | (589)   | (690)   | (593)   | (544)   | (528)   | (516)   | (488)   |
| Actual - % Level of Service  |             | 86.5%   | 89.3%   | 90.6%   | 92.1%   | 92.9%   | 89.2%   | 89.9%   | 89.1%   | 89.1%   | 94.7%   | 95.4%   | 96.2%   | 89.6%   | 89.1%   | 89.1%   | 89.1%   | 87.7%   | 89.3%   | 88.6%   | 89.3%   | 89.6%   | 90.4%   |
| Average - % Level of Service   |             |         |         |         |         |         |         |         |         |         |         |         |         | 89.6%   | 89.1%   | 89.1%   | 89.1%   | 87.7%   | 89.3%   | 88.6%   | 89.3%   | 89.6%   | 90.4%   |
| Annual Student Growth Rate (3)                                       |             | 1.45%   | 2.30%   | 1.92%   | 1.64%   | 0.88%   | -5.97%  | 1.81%   | -0.75%  | -3.24%  | 0.68%   | 0.64%   | -5.72%  | -1.17%  | -0.56%  | -0.42%  | -0.68%  | -0.42%  | 0.59%   | 0.55%   | 0.59%   | 0.60%   | 0.65%   |

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

- (1) It is important to note that the reflects the November 15, 2020 date of membership as outlined in the Florida Administrative Code.  
(2) The Florida Model provides for the "Linear Method" of projections for both CHCS and OCS. Original projections used in prior year projection models included the "Linear Extrapolation Method" for CHCS.  
(3) Annual growth rate calculated using actual membership for years 2011-12 through 2020-21 and average membership for years 2021-22 through 2030-31.  
(4) Class sizes for grades K-2 are 1:20 for school years 2020 through 2021-22. In accordance with 2008 School Curriculum Rule, Group Decision, effective the 2008-2009 school year with the opening of CHCS Elementary #10, K-2 class sizes are 1:21 as directed by past State legislative action.

## OCS Student Projections(1)

| Middle   | School Year | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 |
|--|-------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Actual   |             | 1,665   | 1,699   | 1,704   | 1,694   | 1,747   | 1,762   | 1,739   | 1,724   | 1,730   | 1,779   | 1,763   | 1,654   |         |         |         |         |         |         |         |         |         |         |
| Teacher (2)  |             |         |         |         |         |         |         |         |         |         |         |         |         | 1,649   | 1,642   | 1,635   | 1,629   | 1,623   | 1,617   | 1,611   | 1,605   | 1,599   | 1,592   |
| OC Planning  |             |         |         |         |         |         |         |         |         |         |         |         |         | 1,693   | 1,699   | 1,715   | 1,730   | 1,746   | 1,762   | 1,778   | 1,794   | 1,811   | 1,828   |
| 10 Year Growth   |             |         |         |         |         |         |         |         |         |         |         |         |         | 1,630   | 1,585   | 1,600   | 1,595   | 1,571   | 1,540   | 1,494   | 1,463   | 1,470   | 1,493   |
| 5 Year Growth  |             |         |         |         |         |         |         |         |         |         |         |         |         | 1,613   | 1,568   | 1,570   | 1,539   | 1,542   | 1,507   | 1,458   | 1,424   | 1,439   | 1,463   |
| 3 Year Growth  |             |         |         |         |         |         |         |         |         |         |         |         |         | 1,599   | 1,548   | 1,541   | 1,507   | 1,516   | 1,471   | 1,418   | 1,379   | 1,393   | 1,427   |
| Average  |             |         |         |         |         |         |         |         |         |         |         |         |         | 1,624   | 1,611   | 1,612   | 1,593   | 1,598   | 1,579   | 1,562   | 1,530   | 1,538   | 1,545   |
| Annual Change - Increase (Decrease) in Actual & Projected Membership |             | 64      | 33      | 6       | (20)    | 63      | 15      | (23)    | (15)    | 6       | 49      | (16)    | (109)   | (20)    | (24)    | 2       | (19)    | 6       | (19)    | (27)    | (22)    | 8       | 8       |
| Capacity - 100% Level of Service                                     |             | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   | 2,165   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      |             | (601)   | (466)   | (461)   | (472)   | (418)   | (404)   | (427)   | (442)   | (436)   | (367)   | (403)   | (512)   | (532)   | (550)   | (553)   | (573)   | (568)   | (587)   | (614)   | (638)   | (626)   | (651)   |
| 100% Level of Service  |             | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   | 2,219   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      |             | (603)   | (460)   | (454)   | (464)   | (411)   | (396)   | (419)   | (434)   | (428)   | (359)   | (395)   | (504)   | (524)   | (542)   | (545)   | (565)   | (560)   | (579)   | (606)   | (630)   | (618)   | (643)   |
| Actual - % Level of Service  |             | 76.9%   | 78.4%   | 78.7%   | 77.7%   | 80.7%   | 81.3%   | 80.3%   | 79.8%   | 79.8%   | 82.1%   | 81.4%   | 76.4%   | 76.5%   | 74.4%   | 74.4%   | 73.5%   | 73.8%   | 72.9%   | 72.5%   | 71.7%   | 70.6%   | 71.4%   |
| Average - % Level of Service   |             |         |         |         |         |         |         |         |         |         |         |         |         | 76.5%   | 74.4%   | 74.4%   | 73.5%   | 73.8%   | 72.9%   | 72.5%   | 71.7%   | 70.6%   | 71.4%   |
| Annual Student Growth Rate (3)                                       |             | 4.00%   | 1.99%   | 0.26%   | -1.17%  | 3.74%   | 0.86%   | -1.31%  | -0.86%  | 0.25%   | 2.83%   | -0.90%  | -6.18%  | -1.16%  | -1.46%  | 0.13%   | -1.18%  | 0.31%   | -1.29%  | -1.71%  | -1.42%  | 0.60%   | 0.66%   |

- (1) It is important to note that the reflects the November 15, 2020 date of membership as outlined in the Florida Administrative Code.  
(2) The Florida Model provides for the "Linear Method" of projections for both CHCS and OCS. Original projections used in prior year projection models included the "Linear Extrapolation Method" for CHCS.  
(3) Annual growth rate calculated using actual membership for years 2011-12 through 2020-21 and average membership for years 2021-22 through 2030-31.

## OCS Student Projections (1)

| High   | School Year | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 |
|--|-------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Actual   |             | 2,217   | 2,222   | 2,283   | 2,315   | 2,431   | 2,502   | 2,489   | 2,446   | 2,445   | 2,349   | 2,387   | 2,381   |         |         |         |         |         |         |         |         |         |         |
| Teacher (2)  |             |         |         |         |         |         |         |         |         |         |         |         |         | 2,272   | 2,263   | 2,254   | 2,245   | 2,237   | 2,228   | 2,218   | 2,210   | 2,201   | 2,192   |
| OC Planning  |             |         |         |         |         |         |         |         |         |         |         |         |         | 2,297   | 2,310   | 2,318   | 2,326   | 2,334   | 2,343   | 2,352   | 2,359   | 2,366   | 2,373   |
| 10 Year Growth   |             |         |         |         |         |         |         |         |         |         |         |         |         | 2,297   | 2,310   | 2,318   | 2,326   | 2,334   | 2,343   | 2,352   | 2,359   | 2,366   | 2,373   |
| 5 Year Growth  |             |         |         |         |         |         |         |         |         |         |         |         |         | 2,272   | 2,268   | 2,262   | 2,253   | 2,243   | 2,231   | 2,215   | 2,207   | 2,194   | 2,181   |
| 3 Year Growth  |             |         |         |         |         |         |         |         |         |         |         |         |         | 2,289   | 2,307   | 2,266   | 2,237   | 2,236   | 2,081   | 2,088   | 2,061   | 2,050   | 1,992   |
| Average  |             |         |         |         |         |         |         |         |         |         |         |         |         | 2,265   | 2,267   | 2,231   | 2,233   | 2,239   | 2,213   | 2,221   | 2,200   | 2,176   | 2,157   |
| Annual Change - Increase (Decrease) in Actual & Projected Membership |             | (25)    | 6       | 61      | 32      | 106     | 81      | (23)    | (23)    | (1)     | (89)    | 48      | (16)    | (16)    | 2       | (89)    | (7)     | (64)    | (26)    | 6       | (21)    | (24)    | (19)    |
| Capacity - 100% Level of Service                                     |             | 2,558   | 2,558   | 2,558   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      |             | (341)   | (336)   | (275)   | (124)   | (15)    | 83      | 30      | 7       | 6       | (59)    | (42)    | (68)    | (674)   | (672)   | (638)   | (646)   | (700)   | (725)   | (716)   | (739)   | (763)   | (782)   |
| 100% Level of Service  |             | 2,614   | 2,614   | 2,614   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   | 2,683   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      |             | (697)   | (692)   | (631)   | (488)   | (252)   | (181)   | (214)   | (237)   | (239)   | (354)   | (286)   | (202)   | (866)   | (866)   | (832)   | (809)   | (894)   | (1,029) | (1,012) | (1,033) | (1,067) | (1,076) |
| Actual - % Level of Service  |             | 86.7%   | 88.9%   | 88.2%   | 84.8%   | 98.9%   | 102.6%  | 101.2%  | 100.3%  | 100.2%  | 95.2%   | 96.3%   | 97.6%   | 96.5%   | 96.5%   | 96.3%   | 96.3%   | 96.2%   | 95.2%   | 95.6%   | 94.0%   | 94.0%   | 93.4%   |
| Average - % Level of Service   |             |         |         |         |         |         |         |         |         |         |         |         |         | 96.5%   | 96.5%   | 96.3%   | 96.3%   | 96.2%   | 95.2%   | 95.6%   | 94.0%   | 94.0%   | 93.4%   |
| Annual Student Growth Rate (3)                                       |             | -1.12%  | 0.23%   | 2.76%   | 1.40%   | 4.68%   | 3.36%   | -1.32%  | -0.83%  | -0.84%  | -3.93%  | 2.04%   | -6.87%  | -6.86%  | 0.09%   | -2.80%  | -0.32%  | -2.86%  | -1.19%  | 0.27%   | -0.94%  | -1.10%  | -0.88%  |

Orange Ridge High School adding 500 seats.

Orange Ridge High School adding 500 seats.

- (1) It is important to note that the reflects the November 15, 2020 date of membership as outlined in the Florida Administrative Code.  
(2) The Florida Model provides for the "Linear Method" of projections for both CHCS and OCS. Original projections used in prior year projection models included the "Linear Extrapolation Method" for CHCS.  
(3) Annual growth rate calculated using actual membership for years 2011-12 through 2020-21 and average membership for years 2021-22 through 2030-31.

## CHCCS Student Projections (1) (4)

| Elementary   | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| School Year  |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Actual   | 5,215   | 5,298   | 5,484   | 5,643   | 5,554   | 5,641   | 5,501   | 5,567   | 5,622   | 5,471   | 5,363   | 4,898   | 4,905   | 4,877   | 4,859   | 4,852   | 4,854   | 4,848   | 4,838   | 4,830   | 4,822   | 4,814   |
| Teacher (2)  |         |         |         |         |         |         |         |         |         |         |         |         | 5,905   | 5,122   | 5,159   | 5,195   | 5,231   | 5,268   | 5,305   | 5,343   | 5,358   | 5,345   |
| OC Planning  |         |         |         |         |         |         |         |         |         |         |         |         | 4,732   | 4,688   | 4,689   | 4,652   | 4,600   | 4,545   | 4,580   | 4,638   | 4,683   | 4,728   |
| 10 Year Growth   |         |         |         |         |         |         |         |         |         |         |         |         | 4,605   | 4,524   | 4,483   | 4,424   | 4,381   | 4,425   | 4,468   | 4,512   | 4,559   | 4,604   |
| 5 Year Growth  |         |         |         |         |         |         |         |         |         |         |         |         | 4,644   | 4,431   | 4,347   | 4,262   | 4,204   | 4,248   | 4,288   | 4,331   | 4,374   | 4,418   |
| 3 Year Growth  |         |         |         |         |         |         |         |         |         |         |         |         | 4,866   | 4,431   | 4,347   | 4,262   | 4,204   | 4,248   | 4,288   | 4,331   | 4,374   | 4,418   |
| Average  |         |         |         |         |         |         |         |         |         |         |         |         | 4,866   | 4,431   | 4,347   | 4,262   | 4,204   | 4,248   | 4,288   | 4,331   | 4,374   | 4,418   |
| Annual Change - Increase (Decrease) in Actual & Projected Membership | (83)    | 77      | 198     | 79      | 11      | (13)    | (48)    | 68      | (56)    | (51)    | (105)   | (57)    | (88)    | (109)   | (83)    | (28)    | (21)    | 32      | 69      | 33      | 28      | 36      |
| Capacity - 100% Level of Service (LOS)                               | 5,244   | 5,244   | 5,244   | 5,244   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   | 5,229   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      | (29)    | 82      | 220     | 299     | (27)    | (248)   | (229)   | (229)   | (229)   | (229)   | (229)   | (229)   | (229)   | (229)   | (229)   | (229)   | (229)   | (229)   | (229)   | (229)   | (229)   | (229)   |
| Capacity - 100% Level of Service (LOS)                               | 5,506   | 5,506   | 5,506   | 5,506   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   | 5,120   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      | (297)   | (210)   | (42)    | 37      | (69)    | (879)   | (819)   | (853)   | (828)   | (878)   | (954)   | (1,054) | (1,138) | (1,239) | (1,285) | (1,292) | (1,319) | (1,391) | (1,246) | (1,217) | (1,188) | (1,165) |
| Actual - % Level of Service  | 99.5%   | 98.0%   | 104.2%  | 108.7%  | 95.3%   | 95.1%   | 94.4%   | 95.9%   | 97.5%   | 95.8%   | 94.1%   | 95.4%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   |
| Average - % Level of Service   | 99.5%   | 98.0%   | 104.2%  | 108.7%  | 95.3%   | 95.1%   | 94.4%   | 95.9%   | 97.5%   | 95.8%   | 94.1%   | 95.4%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   | 94.9%   |
| Annual Student Growth Rate (3)                                       | -1.87%  | 1.48%   | 3.17%   | 1.48%   | -0.23%  | -0.72%  | 1.30%   | -0.87%  | -0.97%  | -1.97%  | -2.09%  | -0.86%  | -0.86%  | -0.86%  | -0.86%  | -0.86%  | -0.86%  | -0.86%  | -0.86%  | -0.86%  | -0.86%  | -0.86%  |

Elementary School #11 opens with 550 seats

Capacity decrease due to change in class size ratios per house (88:13 to 1:1 average class size ratios are 1:20 as directed by State legislative action)

- (1) The importance to note that this reflects the November 15, 2020 date of membership as indicated by the School Adequacy Public Facilities Database. It does not include CHCCS students attending the tripartite school.
- (2) The "Teacher Method" provides for the "Teacher Method" of projections for both CHCCS and OCS. Original projections used in prior years projection models included the "Teacher Method" for OCS.
- (3) Annual growth rate calculated using actual membership for years 2011-12 through 2020-21 and average membership for years 2021-22 through 2030-31.
- (4) Class sizes for grades K-3 are 1:20 for school years 2020-21 through 2021-22. In accordance with 2020-21 School Consolidation Work Group decision, effective the 2020-21 school year with the opening of CHCCS Elementary #11, K-3 class sizes are 1:21 as directed by past State legislative action.

## CHCCS Student Projections (1)

| Middle   | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| School Year  |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Actual   | 2,108   | 2,122   | 2,143   | 2,184   | 2,244   | 2,281   | 2,344   | 2,379   | 2,353   | 2,351   | 2,344   | 2,317   | 2,312   | 2,309   | 2,303   | 2,298   | 2,294   | 2,289   | 2,284   | 2,280   | 2,275   | 2,270   |
| Teacher (2)  |         |         |         |         |         |         |         |         |         |         |         |         | 2,612   | 2,609   | 2,603   | 2,598   | 2,594   | 2,589   | 2,584   | 2,580   | 2,575   | 2,570   |
| OC Planning  |         |         |         |         |         |         |         |         |         |         |         |         | 2,609   | 2,597   | 2,589   | 2,582   | 2,577   | 2,572   | 2,567   | 2,562   | 2,557   | 2,552   |
| 10 Year Growth   |         |         |         |         |         |         |         |         |         |         |         |         | 2,589   | 2,577   | 2,569   | 2,562   | 2,557   | 2,552   | 2,547   | 2,542   | 2,537   | 2,532   |
| 5 Year Growth  |         |         |         |         |         |         |         |         |         |         |         |         | 2,589   | 2,577   | 2,569   | 2,562   | 2,557   | 2,552   | 2,547   | 2,542   | 2,537   | 2,532   |
| 3 Year Growth  |         |         |         |         |         |         |         |         |         |         |         |         | 2,589   | 2,577   | 2,569   | 2,562   | 2,557   | 2,552   | 2,547   | 2,542   | 2,537   | 2,532   |
| Average  |         |         |         |         |         |         |         |         |         |         |         |         | 2,589   | 2,577   | 2,569   | 2,562   | 2,557   | 2,552   | 2,547   | 2,542   | 2,537   | 2,532   |
| Annual Change - Increase (Decrease) in Actual & Projected Membership | 11      | 14      | 21      | 32      | 73      | 75      | (17)    | (10)    | 4       | 199     | 111     | (207)   | (287)   | (280)   | (274)   | (269)   | (264)   | (259)   | (254)   | (249)   | (244)   | (239)   |
| Capacity - 100% Level of Service (LOS)                               | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   | 2,345   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      | (120)   | (119)   | (87)    | (59)    | 18      | (80)    | (120)   | (115)   | (111)   | (11)    | (20)    | (27)    | (27)    | (27)    | (27)    | (27)    | (27)    | (27)    | (27)    | (27)    | (27)    | (27)    |
| 100% Level of Service  | 3,029   | 3,029   | 3,029   | 3,029   | 3,029   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      | (231)   | (217)   | (288)   | (254)   | (181)   | (218)   | (288)   | (221)   | (217)   | (217)   | (108)   | (233)   | (278)   | (270)   | (263)   | (258)   | (253)   | (248)   | (243)   | (238)   | (233)   | (228)   |
| Actual - % Level of Service  | 95.4%   | 95.8%   | 95.8%   | 95.8%   | 100.0%  | 97.2%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   |
| Average - % Level of Service   | 95.4%   | 95.8%   | 95.8%   | 95.8%   | 100.0%  | 97.2%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   | 95.6%   |
| Annual Student Growth Rate (3)                                       | 0.41%   | 0.57%   | 1.14%   | 1.18%   | 2.62%   | 0.40%   | -0.69%  | -0.63%  | 0.14%   | 3.67%   | 3.78%   | -4.17%  | -1.49%  | -1.62%  | -1.64%  | -1.66%  | -1.68%  | -1.69%  | -1.70%  | -1.71%  | -1.72%  | -1.73%  |

Additional 204 new seats at Cullen Middle School

- (1) The importance to note that this reflects the November 15, 2020 date of membership as indicated by the School Adequacy Public Facilities Database. It does not include CHCCS students attending the tripartite school.
- (2) The "Teacher Method" provides for the "Teacher Method" of projections for both CHCCS and OCS. Original projections used in prior years projection models included the "Teacher Method" for OCS.
- (3) Annual growth rate calculated using actual membership for years 2011-12 through 2020-21 and average membership for years 2021-22 through 2030-31.

## CHCCS Student Projections (1)

| High   | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| School Year  |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Actual   | 3,806   | 3,840   | 3,714   | 3,799   | 3,764   | 3,730   | 3,701   | 3,767   | 3,627   | 3,532   | 3,640   | 3,532   | 3,828   | 3,819   | 3,813   | 3,807   | 3,800   | 3,894   | 3,888   | 3,881   | 3,875   | 3,868   |
| Teacher (2)  |         |         |         |         |         |         |         |         |         |         |         |         | 3,758   | 3,754   | 3,752   | 3,750   | 3,747   | 3,744   | 3,738   | 3,731   | 3,723   | 3,715   |
| OC Planning  |         |         |         |         |         |         |         |         |         |         |         |         | 3,824   | 3,805   | 3,842   | 3,872   | 3,898   | 3,911   | 3,945   | 3,981   | 3,989   | 3,995   |
| 10 Year Growth   |         |         |         |         |         |         |         |         |         |         |         |         | 3,808   | 3,806   | 3,808   | 3,847   | 3,870   | 3,908   | 3,952   | 3,970   | 3,973   | 3,975   |
| 5 Year Growth  |         |         |         |         |         |         |         |         |         |         |         |         | 3,823   | 3,844   | 3,872   | 3,890   | 3,914   | 3,935   | 3,955   | 3,975   | 3,995   | 4,015   |
| 3 Year Growth  |         |         |         |         |         |         |         |         |         |         |         |         | 3,804   | 3,815   | 3,806   | 3,863   | 3,844   | 3,721   | 3,641   | 3,687   | 3,738   | 3,787   |
| Average  |         |         |         |         |         |         |         |         |         |         |         |         | 3,804   | 3,815   | 3,806   | 3,863   | 3,844   | 3,721   | 3,641   | 3,687   | 3,738   | 3,787   |
| Annual Change - Increase (Decrease) in Actual & Projected Membership | (26)    | 34      | 74      | 82      | (33)    | (69)    | (29)    | 61      | 165     | 5       | 8       | (8)     | (28)    | 11      | (8)     | (14)    | (49)    | (123)   | (89)    | (83)    | (119)   | (68)    |
| Capacity - 100% Level of Service (LOS)                               | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   | 3,826   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      | (220)   | (235)   | (161)   | (79)    | (111)   | (145)   | (174)   | (113)   | 62      | 57      | 66      | (42)    | (71)    | (80)    | (89)    | (82)    | (131)   | (254)   | (324)   | (419)   | (537)   | (674)   |
| 100% Level of Service  | 4,219   | 4,263   | 4,263   | 4,263   | 4,263   | 4,263   | 4,263   | 4,263   | 4,263   | 4,263   | 4,263   | 4,263   | 4,273   | 4,273   | 4,273   | 4,273   | 4,273   | 4,273   | 4,273   | 4,273   | 4,273   | 4,273   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      | (403)   | (423)   | (449)   | (447)   | (499)   | (533)   | (532)   | (496)   | (436)   | (430)   | (422)   | (441)   | (459)   | (460)   | (460)   | (460)   | (460)   | (460)   | (460)   | (460)   | (460)   | (460)   |
| Actual - % Level of Service  | 94.0%   | 92.0%   | 95.8%   | 95.8%   | 97.1%   | 95.2%   | 95.2%   | 97.1%   | 101.2%  | 101.2%  | 101.2%  | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   |
| Average - % Level of Service   | 94.0%   | 92.0%   | 95.8%   | 95.8%   | 97.1%   | 95.2%   | 95.2%   | 97.1%   | 101.2%  | 101.2%  | 101.2%  | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   | 95.2%   |
| Annual Student Growth Rate (3)                                       | -0.88%  | 0.84%   | 2.03%   | 2.21%   | -0.84%  | -0.80%  | -0.78%  | 1.65%   | 4.38%   | 0.12%   | 0.20%   | -0.28%  | -0.72%  | 0.28%   | -0.21%  | -0.36%  | -1.27%  | -3.20%  | -1.16%  | -2.28%  | -3.38%  | -1.10%  |

Phoenix Academy High School becomes official high school starting 2020-11 school year with 40 student capacity

100 seats added to Q-H-G for the 2020-2021 school year

- (1) The importance to note that this reflects the November 15, 2020 date of membership as indicated by the School Adequacy Public Facilities Database. It does not include CHCCS students attending the tripartite school.
- (2) The "Teacher Method" provides for the "Teacher Method" of projections for both CHCCS and OCS. Original projections used in prior years projection models included the "Teacher Method" for OCS.
- (3) Annual growth rate calculated using actual membership for years 2011-12 through 2020-21 and average membership for years 2021-22 through 2030-31.



### OCS Student Projections (1) (4)

| Elementary   | School Year | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 |
|--|-------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Actual   |             | 3,211   | 3,265   | 3,348   | 3,403   | 3,433   | 3,559   | 3,519   | 3,293   | 3,183   | 3,205   | 3,222   | 3,047   | 3,022   |         |         |         |         |         |         |         |         |         |         |
| Teacher (2)  |             |         |         |         |         |         |         |         |         |         |         |         |         |         | 3,012   | 3,001   | 2,990   | 2,979   | 2,968   | 2,957   | 2,945   | 2,934   | 2,923   | 2,912   |
| OC Planning  |             |         |         |         |         |         |         |         |         |         |         |         |         |         | 3,015   | 2,993   | 2,947   | 2,898   | 2,872   | 2,869   | 2,857   | 2,855   | 2,861   | 2,864   |
| 10 Year Growth   |             |         |         |         |         |         |         |         |         |         |         |         |         |         | 2,687   | 2,690   | 2,852   | 2,841   | 2,870   | 2,936   | 3,026   | 3,060   | 3,060   | 3,121   |
| 6 Year Growth  |             |         |         |         |         |         |         |         |         |         |         |         |         |         | 2,045   | 2,042   | 2,244   | 2,228   | 2,453   | 2,583   | 3,012   | 3,043   | 3,073   | 3,104   |
| 3 Year Growth  |             |         |         |         |         |         |         |         |         |         |         |         |         |         | 2,083   | 2,056   | 2,205   | 2,186   | 2,394   | 2,594   | 2,924   | 3,024   | 3,054   |         |
| Average  |             |         |         |         |         |         |         |         |         |         |         |         |         |         | 3,000   | 2,982   | 2,948   | 2,928   | 2,924   | 2,943   | 2,962   | 2,972   | 2,984   | 3,011   |
| Annual Change - Increase (Decrease) in Actual & Projected Membership |             | 46      | 74      | 63      | 55      | 30      | (174)   | 59      | (25)    | (119)   | 22      | 27      | (188)   | (24)    | (23)    | (19)    | (24)    | (22)    | 8       | 15      | 13      | 16      | 17      | 17      |
| Capacity - 100% Level of Service                                     |             | 3,694   | 3,694   | 3,694   | 3,694   | 3,694   | 3,694   | 3,694   | 3,694   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   | 3,261   |
| Number of Students, Actual and Projected, Over (Under), 100% LOS     |             | (483)   | (429)   | (351)   | (291)   | (261)   | (435)   | (275)   | (401)   | (178)   | (156)   | (129)   | (214)   | (236)   | (236)   | (279)   | (438)   | (427)   | (412)   | (296)   | (384)   | (267)   | (250)   |         |
| 100% Level of Service  |             | 3,879   | 3,879   | 3,879   | 3,879   | 3,879   | 3,879   | 3,879   | 3,879   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   | 3,529   |
| Number of Students, Actual and Projected, Over (Under), 100% LOS     |             | (669)   | (604)   | (521)   | (478)   | (448)   | (820)   | (561)   | (658)   | (289)   | (264)   | (227)   | (391)   | (422)   | (422)   | (509)   | (647)   | (631)   | (611)   | (487)   | (602)   | (425)   | (406)   |         |
| Actual - % Level of Service  |             | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   |
| Average - % Level of Service   |             | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   |
| Annual Student Growth Rate (3)                                       |             | 1.45%   | 1.30%   | 1.92%   | 1.64%   | 0.88%   | -6.07%  | 1.81%   | -0.75%  | -3.34%  | 0.89%   | 0.84%   | -6.72%  | -0.79%  | -0.74%  | -0.82%  | -1.14%  | -0.74%  | 0.20%   | 0.51%   | 0.45%   | 0.52%   | 0.57%   | 0.58%   |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
|  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |

Capacity decrease due to change in class size ratios per House Bill 1337.  
3 average class size ratios are 1:20 as directed by State legislative action.

- (1) Not required to include the November 15, 2020 date of membership as reflected by the Statewide Adequacy Public Facilities Database.  
(2) The Teacher Model provides for the "Teacher Model" projections for both K-12 and OCS. Original projections used to provide projections included the "Teacher Model" for OCS.  
(3) Annual growth rates calculated using actual membership for years 2009-10 through 2020-21 and average membership for years 2021-22 through 2030-31.  
(4) Class size for grades K-3 is 1:20 through year 2020-21. In accordance with 2008 School Collaboration Work Group decision, after the 2008-2009 school year with the opening of OCS's Elementary #10, K-3 class sizes are 1:21 as directed by State legislative action.

### OCS Student Projections(1)

| Middle   | School Year | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 |
|--|-------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Actual   |             | 1,805   | 1,899   | 1,704   | 1,684   | 1,747   | 1,782   | 1,739   | 1,724   | 1,730   | 1,770   | 1,763   | 1,854   | 1,815   | 1,850   | 1,844   | 1,838   | 1,832   | 1,826   | 1,820   | 1,814   | 1,807   | 1,801   | 1,595   |
| Teacher (2)  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| OC Planning  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 10 Year Growth   |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 6 Year Growth  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 3 Year Growth  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Average  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Annual Change - Increase (Decrease) in Actual & Projected Membership |             | 64      | 33      | 6       | (20)    | 63      | 15      | (23)    | (15)    | 6       | 49      | (16)    | (188)   | 2       | (94)    | (12)    | (11)    | (8)     | (18)    | (33)    | (19)    | 3       | 7       | 6       |
| Capacity - 100% Level of Service                                     |             | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   | 2,166   |
| Number of Students, Actual and Projected, Over (Under), 100% LOS     |             | (361)   | (267)   | (462)   | (482)   | (419)   | (404)   | (427)   | (442)   | (436)   | (397)   | (403)   | (312)   | (310)   | (316)   | (326)   | (337)   | (374)   | (391)   | (425)   | (444)   | (440)   | (433)   | (427)   |
| 100% Level of Service  |             | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   | 2,318   |
| Number of Students, Actual and Projected, Over (Under), 100% LOS     |             | (653)   | (620)   | (614)   | (634)   | (671)   | (698)   | (673)   | (694)   | (689)   | (636)   | (655)   | (584)   | (582)   | (605)   | (630)   | (676)   | (725)   | (742)   | (778)   | (795)   | (792)   | (784)   | (776)   |
| Actual - % Level of Service  |             | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   |
| Average - % Level of Service   |             | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   | 79.9%   |
| Annual Student Growth Rate (3)                                       |             | 4.00%   | 1.98%   | 0.35%   | -1.17%  | 3.74%   | 0.66%   | -1.31%  | -0.86%  | 0.35%   | 2.33%   | -0.90%  | -6.18%  | 0.12%   | -2.04%  | -0.74%  | -0.77%  | -0.36%  | -1.11%  | -2.12%  | -1.23%  | 0.23%   | 0.47%   | 0.41%   |

- (1) Not required to include the November 15, 2020 date of membership as reflected by the Statewide Adequacy Public Facilities Database.  
(2) The Teacher Model provides for the "Teacher Model" projections for both K-12 and OCS. Original projections used to provide projections included the "Teacher Model" for OCS.  
(3) Annual growth rates calculated using actual membership for years 2009-10 through 2020-21 and average membership for years 2021-22 through 2030-31.

### OCS Student Projections (1)

| High   | School Year | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 |
|--|-------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Actual   |             | 2,217   | 2,222   | 2,283   | 2,310   | 2,421   | 2,502   | 2,469   | 2,448   | 2,445   | 2,349   | 2,391   | 2,391   | 2,412   | 2,483   | 2,454   | 2,445   | 2,438   | 2,427   | 2,416   | 2,405   | 2,400   | 2,391   | 2,381   |
| Teacher (2)  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| OC Planning  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 10 Year Growth   |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 6 Year Growth  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 3 Year Growth  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Average  |             |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Annual Change - Increase (Decrease) in Actual & Projected Membership |             | (25)    | 5       | 61      | 32      | 106     | 81      | (33)    | (23)    | (1)     | (99)    | 40      | (18)    | 91      | 38      | (42)    | (23)    | (19)    | (44)    | 6       | (24)    | (25)    | (19)    | (20)    |
| Capacity - 100% Level of Service                                     |             | 2,550   | 2,550   | 2,550   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   | 2,439   |
| Number of Students, Actual and Projected, Over (Under), 100% LOS     |             | (333)   | (328)   | (267)   | (129)   | (18)    | 67      | 30      | 7       | 6       | (90)    | (42)    | (5)     | (47)    | (467)   | (431)   | (473)   | (501)   | (511)   | (524)   | (518)   | (542)   | (565)   | (577)   |
| 100% Level of Service  |             | 2,814   | 2,814   | 2,814   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   | 2,832   |
| Number of Students, Actual and Projected, Over (Under), 100% LOS     |             | (697)   | (692)   | (631)   | (493)   | (386)   | (311)   | (214)   | (222)   | (226)   | (234)   | (268)   | (282)   | (278)   | (323)   | (323)   | (323)   | (323)   | (323)   | (323)   | (323)   | (323)   | (323)   | (323)   |
| Actual - % Level of Service  |             | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   |
| Average - % Level of Service   |             | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   | 89.9%   |
| Annual Student Growth Rate (3)                                       |             | -1.12%  | 0.23%   | 2.75%   | 1.40%   | 4.58%   | 3.35%   | -1.32%  | -0.93%  | -0.04%  | -3.93%  | 2.04%   | -0.67%  | 3.82%   | 1.48%   | -1.69%  | -1.14%  | -3.25%  | -1.85%  | 0.27%   | -1.05%  | -1.07%  | -0.90%  | -1.43%  |

Change High capacity decreased, per CFI study

Cedar Ridge High School adding 500 seats

- (1) Not required to include the November 15, 2020 date of membership as reflected by the Statewide Adequacy Public Facilities Database.  
(2) The Teacher Model provides for the "Teacher Model" projections for both K-12 and OCS. Original projections used to provide projections included the "Teacher Model" for OCS.  
(3) Annual growth rates calculated using actual membership for years 2009-10 through 2020-21 and average membership for years 2021-22 through 2030-31.

## CHCCS Student Projections (1) (4)

## Elementary

| School Year  | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Actual   | 2,210   | 2,216   | 2,242   | 2,243   | 2,224   | 2,241   | 2,251   | 2,267   | 2,272   | 2,241   | 2,230   | 2,213   | 2,192   |
| Teacher (2)  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| GC Planning  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 10 Year Growth   |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 5 Year Growth  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 3 Year Growth  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Average  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Annual Change - Increase (Decrease) in Actual & Projected Membership | 60      | 77      | 166     | 79      | 111     | 123     | 100     | 84      | 100     | 100     | 100     | 100     | 100     |
| Capacity - 100% Level of Service (LOS)                               | 5,244   | 5,244   | 5,244   | 5,244   | 5,239   | 5,239   | 5,239   | 5,239   | 5,244   | 5,244   | 5,244   | 5,244   | 5,244   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      | 300     | 42      | 220     | 298     | 270     | 220     | 220     | 220     | 180     | 180     | 180     | 180     | 180     |
| Capacity - 100% Level of Service (LOS)                               | 5,590   | 5,590   | 5,590   | 5,590   | 5,590   | 5,590   | 5,590   | 5,590   | 5,590   | 5,590   | 5,590   | 5,590   | 5,590   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      | 300     | 42      | 220     | 298     | 270     | 220     | 220     | 220     | 180     | 180     | 180     | 180     | 180     |
| Actual - % Level of Service  | 95.5%   | 101.2%  | 104.2%  | 105.7%  | 95.3%   | 95.1%   | 94.1%   | 94.1%   | 94.1%   | 94.1%   | 94.1%   | 94.1%   | 94.1%   |
| Average - % Level of Service   |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Annual Student Growth Rate (3)                                       | -1.67%  | -1.40%  | 3.17%   | 1.48%   | 0.20%   | -1.40%  | -0.72%  | 1.20%   | -0.81%  | -0.52%  | -1.97%  | -2.17%  | -2.39%  |

Secondary school #11 centre with 100 seats

Secondary school #11 centre with 100 seats

(1) The Department of Public Safety, Division 10, 2020-21 membership is subject to the School District Public Safety Services. It does not include 2020-21 membership for the District.

(2) The District does not have a history of providing for GCOS and GCOS. District personnel and/or parent/guardian responsibility is subject to the District's policy on GCOS.

(3) Annual growth rate is calculated as the percentage change in the number of students from the previous year to the current year (2019-20 to 2020-21).

(4) Data from the year 2019-20 through 2020-21 is based on the 2019-20 enrollment data. The enrollment data for 2020-21 is based on the 2019-20 enrollment data.

## CHCCS Student Projections (1)

## Middle

| School Year  | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Actual   | 2,733   | 2,722   | 2,720   | 2,720   | 2,720   | 2,720   | 2,720   | 2,720   | 2,720   | 2,720   | 2,720   | 2,720   | 2,720   |
| Teacher (2)  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| GC Planning  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 10 Year Growth   |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 5 Year Growth  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 3 Year Growth  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Average  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Annual Change - Increase (Decrease) in Actual & Projected Membership | 11      | 12      | 31      | 32      | 33      | 34      | 35      | 36      | 37      | 38      | 39      | 40      | 41      |
| Capacity - 100% Level of Service (LOS)                               | 2,840   | 2,840   | 2,840   | 2,840   | 2,840   | 2,840   | 2,840   | 2,840   | 2,840   | 2,840   | 2,840   | 2,840   | 2,840   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      | 100     | 100     | 100     | 100     | 100     | 100     | 100     | 100     | 100     | 100     | 100     | 100     | 100     |
| 100% Level of Service  | 3,030   | 3,030   | 3,030   | 3,030   | 3,030   | 3,030   | 3,030   | 3,030   | 3,030   | 3,030   | 3,030   | 3,030   | 3,030   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      | 100     | 100     | 100     | 100     | 100     | 100     | 100     | 100     | 100     | 100     | 100     | 100     | 100     |
| Actual - % Level of Service  | 95.4%   | 95.5%   | 95.5%   | 95.5%   | 95.5%   | 95.5%   | 95.5%   | 95.5%   | 95.5%   | 95.5%   | 95.5%   | 95.5%   | 95.5%   |
| Average - % Level of Service   |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Annual Student Growth Rate (3)                                       | 0.44%   | 0.42%   | 1.14%   | 1.16%   | 1.20%   | 1.21%   | 1.22%   | 1.23%   | 1.24%   | 1.25%   | 1.26%   | 1.27%   | 1.28%   |

Additional: Elementary school of Carboro Middle School

(1) The Department of Public Safety, Division 10, 2020-21 membership is subject to the School District Public Safety Services. It does not include 2020-21 membership for the District.

(2) The District does not have a history of providing for GCOS and GCOS. District personnel and/or parent/guardian responsibility is subject to the District's policy on GCOS.

(3) Annual growth rate is calculated as the percentage change in the number of students from the previous year to the current year (2019-20 to 2020-21).

(4) Data from the year 2019-20 through 2020-21 is based on the 2019-20 enrollment data. The enrollment data for 2020-21 is based on the 2019-20 enrollment data.

## CHCCS Student Projections (1)

## High

| School Year  | 2019-20 | 2020-21 | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Actual   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   |
| Teacher (2)  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| GC Planning  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 10 Year Growth   |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 5 Year Growth  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| 3 Year Growth  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Average  |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Annual Change - Increase (Decrease) in Actual & Projected Membership | 34      | 34      | 74      | 82      | 92      | 98      | 100     | 100     | 100     | 100     | 100     | 100     | 100     |
| Capacity - 100% Level of Service (LOS)                               | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   | 3,810   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      | 300     | 300     | 300     | 300     | 300     | 300     | 300     | 300     | 300     | 300     | 300     | 300     | 300     |
| 100% Level of Service  | 4,110   | 4,110   | 4,110   | 4,110   | 4,110   | 4,110   | 4,110   | 4,110   | 4,110   | 4,110   | 4,110   | 4,110   | 4,110   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      | 300     | 300     | 300     | 300     | 300     | 300     | 300     | 300     | 300     | 300     | 300     | 300     | 300     |
| Actual - % Level of Service  | 94.2%   | 94.2%   | 94.2%   | 94.2%   | 94.2%   | 94.2%   | 94.2%   | 94.2%   | 94.2%   | 94.2%   | 94.2%   | 94.2%   | 94.2%   |
| Average - % Level of Service   |         |         |         |         |         |         |         |         |         |         |         |         |         |
| Annual Student Growth Rate (3)                                       | -0.68%  | -0.67%  | 2.02%   | 2.11%   | 2.41%   | 2.61%   | 2.71%   | 2.81%   | 2.91%   | 3.01%   | 3.11%   | 3.21%   | 3.31%   |

From: Existing high school services offered high school

From: Existing high school services offered high school

(1) The Department of Public Safety, Division 10, 2020-21 membership is subject to the School District Public Safety Services. It does not include 2020-21 membership for the District.

(2) The District does not have a history of providing for GCOS and GCOS. District personnel and/or parent/guardian responsibility is subject to the District's policy on GCOS.

(3) Annual growth rate is calculated as the percentage change in the number of students from the previous year to the current year (2019-20 to 2020-21).

(4) Data from the year 2019-20 through 2020-21 is based on the 2019-20 enrollment data. The enrollment data for 2020-21 is based on the 2019-20 enrollment data.



## 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 continued growth at each school level within the system. Projected Average Annual Growth Rate over next ten years:

| School Level      | Year Projection Made |           |           |           |           |
|-------------------|----------------------|-----------|-----------|-----------|-----------|
|                   | 2017-2018            | 2018-2019 | 2019-2020 | 2020-2021 | 2021-2022 |
| <b>Elementary</b> | 0.36%                | 0.56%     | 0.65%     | -0.23%    | -0.88%    |
| <b>Middle</b>     | 0.21%                | 0.19%     | -0.07%    | -1.50%    | -2.10%    |
| <b>High</b>       | 0%                   | 0.16%     | 0.03%     | -1.44%    | -2.15%    |

### 5. **Recommendation:**

#### **Chapel Hill-Carrboro City School District**

Use statistics as noted.

### **Standard for:**

#### **Orange County School District**

See Attachment II.D.2

### **Analysis of Existing Conditions:**

#### **Orange County School District**

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

| School Level      | Year Projection Made |           |           |           |           |
|-------------------|----------------------|-----------|-----------|-----------|-----------|
|                   | 2017-2018            | 2018-2019 | 2019-2020 | 2020-2021 | 2021-2022 |
| <b>Elementary</b> | 0.58%                | 0.91%     | 0.84%     | -0.02%    | -0.04%    |
| <b>Middle</b>     | 0.13%                | 0.28%     | 0.37%     | -0.67%    | -0.72%    |
| <b>High</b>       | -0.10%               | 0.21%     | 0.21%     | -0.98%    | -1.06%    |

### **Recommendation:**

#### **Orange County School District**

Use statistics as noted.

**2020-2021****Orange County Student Projections****Elementary**

| School Year        | 2020-2021<br>(actual) | 2021-2022 | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 |
|--------------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership         | 3,047                 | 3,011     | 2,994     | 2,982     | 2,962     | 2,949     | 2,966     | 2,984     | 3,002     | 3,019     | 3,039     |
| Average % Increase |                       | -1.17%    | -0.56%    | -0.42%    | -0.68%    | -0.42%    | 0.59%     | 0.59%     | 0.59%     | 0.60%     | 0.65%     |

**Middle**

| School Year        | 2020-2021<br>(actual) | 2021-2022 | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 |
|--------------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership         | 1,654                 | 1,634     | 1,611     | 1,613     | 1,593     | 1,598     | 1,579     | 1,552     | 1,530     | 1,538     | 1,545     |
| Average % Increase |                       | -1.18%    | -1.46%    | 0.13%     | -1.18%    | 0.31%     | -1.20%    | -1.71%    | -1.42%    | 0.50%     | 0.50%     |

**High School**

| School Year        | 2020-2021<br>(actual) | 2021-2022 | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 |
|--------------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership         | 2,381                 | 2,365     | 2,367     | 2,301     | 2,293     | 2,239     | 2,213     | 2,221     | 2,200     | 2,176     | 2,157     |
| Average % Increase |                       | -0.66%    | 0.09%     | -2.80%    | -0.32%    | -2.36%    | -1.18%    | 0.37%     | -0.94%    | -1.10%    | -0.86%    |

**Chapel Hill/Carrboro Student Projections****Elementary**

| School Year        | 2020-2021<br>(actual) | 2021-2022 | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 |
|--------------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership         | 4,893                 | 4,808     | 4,708     | 4,685     | 4,655     | 4,634     | 4,666     | 4,698     | 4,731     | 4,759     | 4,782     |
| Average % Increase |                       | -1.73%    | -2.09%    | -0.48%    | -0.65%    | -0.45%    | 0.69%     | 0.69%     | 0.69%     | 0.59%     | 0.49%     |

**Middle**

| School Year        | 2020-2021<br>(actual) | 2021-2022 | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 |
|--------------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership         | 2,917                 | 2,874     | 2,830     | 2,747     | 2,671     | 2,601     | 2,558     | 2,511     | 2,473     | 2,489     | 2,505     |
| Average % Increase |                       | -1.49%    | -1.52%    | -2.94%    | -2.76%    | -2.61%    | -1.68%    | -1.83%    | -1.51%    | 0.65%     | 0.65%     |

**High School**

| School Year        | 2020-2021<br>(actual) | 2021-2022 | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 |
|--------------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership         | 3,932                 | 3,904     | 3,915     | 3,906     | 3,893     | 3,844     | 3,721     | 3,641     | 3,557     | 3,438     | 3,401     |
| Average % Increase |                       | -0.72%    | 0.28%     | -0.21%    | -0.35%    | -1.27%    | -3.20%    | -2.15%    | -2.29%    | -3.35%    | -1.10%    |

Attachment II.D.1 – Orange County and Chapel Hill-Carrboro City Student Growth Rates (Chart dates from 2021-2031 based on 11/13/20 membership numbers) (2020-21)



2021-2022

**Orange County Student Projections****Elementary**

| School Year        | 2021-2022<br>(actual) | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 | 2031-2032 |
|--------------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership         | 3,023                 | 3,000     | 2,982     | 2,948     | 2,926     | 2,934     | 2,949     | 2,962     | 2,977     | 2,994     | 3,011     |
| Average % Increase |                       | -0.74%    | -0.62%    | -1.14%    | -0.74%    | 0.26%     | 0.51%     | 0.45%     | 0.52%     | 0.57%     | 0.56%     |

**Middle**

| School Year        | 2021-2022<br>(actual) | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 | 2031-2032 |
|--------------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership         | 1,656                 | 1,622     | 1,610     | 1,599     | 1,592     | 1,575     | 1,541     | 1,522     | 1,526     | 1,533     | 1,539     |
| Average % Increase |                       | -2.04%    | -0.74%    | -0.71%    | -0.39%    | -1.11%    | -2.12%    | -1.23%    | 0.23%     | 0.47%     | 0.41%     |

**High School**

| School Year        | 2021-2022<br>(actual) | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 | 2031-2032 |
|--------------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership         | 2,472                 | 2,508     | 2,466     | 2,438     | 2,358     | 2,315     | 2,321     | 2,297     | 2,272     | 2,254     | 2,222     |
| Average % Increase |                       | 1.46%     | -1.69%    | -1.14%    | -3.25%    | -1.85%    | 0.27%     | -1.05%    | -1.07%    | -0.80%    | -1.43%    |

**Chapel Hill/Carrboro Student Projections****Elementary**

| School Year        | 2021-2022<br>(actual) | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 | 2031-2032 |
|--------------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership         | 4,738                 | 4,582     | 4,505     | 4,411     | 4,321     | 4,271     | 4,281     | 4,292     | 4,304     | 4,322     | 4,333     |
| Average % Increase |                       | -3.30%    | -1.66%    | -2.10%    | -2.03%    | -1.15%    | 0.24%     | 0.25%     | 0.29%     | 0.40%     | 0.27%     |

**Middle**

| School Year        | 2021-2022<br>(actual) | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 | 2031-2032 |
|--------------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership         | 2,802                 | 2,742     | 2,654     | 2,581     | 2,516     | 2,484     | 2,385     | 2,296     | 2,246     | 2,256     | 2,264     |
| Average % Increase |                       | -2.13%    | -3.22%    | -2.77%    | -2.48%    | -1.29%    | -3.98%    | -3.75%    | -2.15%    | 0.42%     | 0.38%     |

**High School**

| School Year        | 2021-2022<br>(actual) | 2022-2023 | 2023-2024 | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 | 2030-2031 | 2031-2032 |
|--------------------|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Membership         | 3,940                 | 3,908     | 3,860     | 3,801     | 3,723     | 3,586     | 3,515     | 3,439     | 3,338     | 3,258     | 3,169     |
| Average % Increase |                       | -0.82%    | -1.22%    | -1.53%    | -2.05%    | -3.69%    | -1.97%    | -2.17%    | -2.93%    | -2.40%    | -2.74%    |

Attachment II.D.2 – Orange County and Chapel Hill-Carrboro City Student Growth Rates (Chart dates from 2022-2032 based on 11/15/21 membership numbers) (2021-22)

## 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:***  

|   |  |
|---|--|
| <b>Chapel Hill-Carrboro City School District</b><br>See Attachment II.E.1 | <b><i>Standard for:</i></b><br><b>Orange County School District</b><br>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:***

No change at this time.

## 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, 2021 membership numbers used to develop a CIP to be considered for adoption in June 2022).

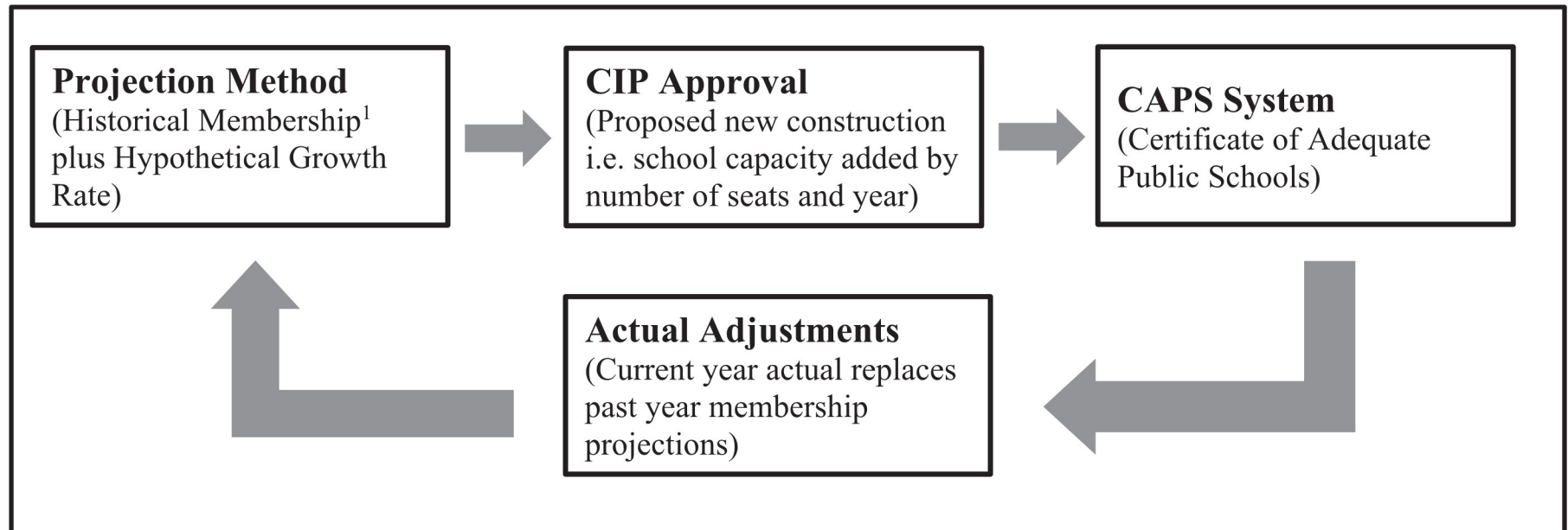
##### **Process Framework**

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)



<sup>1</sup>Historical 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).

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



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

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

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

As previously noted in Section II.C, The City of Mebane is not a party to the SAPFO and does not require that CAPS be issued prior to approving development activities. Increasing development within this area of the county has the potential to encumber a significant portion of the available capacity within the Orange County School District. Although the SAPFO system is not formally regulated in Mebane, staff monitors development activity and when students enter the school system their enrollment is calculated and used in future school projection needs.

Please note that the two processes (CIP and CAPS) are on separate, but parallel tracks. However, the CIP does create a crossover of capacity information between the two processes. 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 2022 - 2032)

November 2020 – June 2021 (using 2021 SAPFOTAC Report)

**SAPFO CAPS Process 2** (for SAPFO System 2022 – 2023)

November 2021 - November 2022

# School Adequate Public Facilities Ordinance

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

2022 CAPS system is effective November 15, 2021 through November 14, 2022.

The system is updated with new membership, CIP capacity changes, and any other BOCC/School District joint action approved capacity prior to November 15, 2021. 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, 2021.

### 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 Family<sup>1</sup>
  - c. Other Housing<sup>1</sup>

### CAPS System<sup>2</sup>

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

$AC \geq 0$  - Issue CAPS

$AC < 0$  - Defer CAPS to later date

<sup>1</sup> 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.

<sup>2</sup> 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

## CHCCS Student Projections (1) (4)

| Elementary   |  | 2009-10 | 2010-11 | 2011-12 | 2012-13                                    | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23   | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 |
|--|--|---------|---------|---------|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| School Year  |  |         |         |         |  |         |         |         |         |         |         |         |         |         |   |         |         |         |         |         |         |         |         |         |
| Actual   |  | 5,219   | 5,296   | 5,464   | 5,543                                      | 5,554   | 5,541   | 5,501   | 5,567   | 5,522   | 5,471   | 5,363   | 4,893   | 4,738   |   |         |         |         |         |         |         |         |         |         |
| Tischler (2)   |  |         |         |         |  |         |         |         |         |         |         |         |         |         | 4,710   | 4,682   | 4,654   | 4,627   | 4,599   | 4,571   | 4,543   | 4,515   | 4,487   | 4,459   |
| OC Planning  |  |         |         |         |  |         |         |         |         |         |         |         |         |         | 4,619   | 4,550   | 4,473   | 4,396   | 4,321   | 4,275   | 4,231   | 4,193   | 4,179   | 4,136   |
| 10 Year Growth   |  |         |         |         |  |         |         |         |         |         |         |         |         |         | 4,557   | 4,486   | 4,385   | 4,285   | 4,244   | 4,286   | 4,329   | 4,373   | 4,416   | 4,460   |
| 5 Year Growth  |  |         |         |         |  |         |         |         |         |         |         |         |         |         | 4,526   | 4,432   | 4,310   | 4,195   | 4,144   | 4,186   | 4,228   | 4,270   | 4,313   | 4,356   |
| 3 Year Growth  |  |         |         |         |  |         |         |         |         |         |         |         |         |         | 4,496   | 4,377   | 4,232   | 4,102   | 4,049   | 4,089   | 4,130   | 4,171   | 4,213   | 4,255   |
| Average  |  |         |         |         |  |         |         |         |         |         |         |         |         |         | 4,582   | 4,505   | 4,411   | 4,321   | 4,271   | 4,281   | 4,292   | 4,304   | 4,322   | 4,333   |
| Annual Change - Increase (Decrease) in Actual & Projected Membership |  | (83)    | 77      | 168     | 79   | 11      | (13)    | (40)    | 66      | (45)    | (51)    | (108)   | (470)   | (155)   | (156)   | (76)    | (95)    | (90)    | (50)    | 10      | 11      | 12      | 17      | 12      |
| Capacity - 100% Level of Service (LOS)                               |  | 5,244   | 5,244   | 5,244   | 5,244                                      | 5,829   | 5,829   | 5,829   | 5,829   | 5,664   | 5,664   | 5,664   | 5,664   | 5,664   | 5,664   | 5,664   | 5,664   | 5,664   | 5,664   | 5,664   | 5,664   | 5,664   | 5,664   | 5,664   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      |  | (25)    | 52      | 220     | 299  | (273)   | (288)   | (328)   | (262)   | (142)   | (193)   | (301)   | (771)   | (926)   | (1,082)   | (1,159) | (1,253) | (1,343) | (1,393) | (1,383) | (1,372) | (1,360) | (1,342) | (1,331) |
| Capacity - 105% Level of Service (LOS)                               |  | 5,506   | 5,506   | 5,506   | 5,506                                      | 6,120   | 6,120   | 6,120   | 6,120   | 5,947   | 5,947   | 5,947   | 5,947   | 5,947   | 5,947   | 5,947   | 5,947   | 5,947   | 5,947   | 5,947   | 5,947   | 5,947   | 5,947   | 5,947   |
| Number of Students, Actual and Projected, Over (Under) 105% LOS      |  | (287)   | (210)   | (42)    | 37   | (566)   | (579)   | (619)   | (553)   | (425)   | (476)   | (584)   | (1,054) | (1,209) | (1,366)   | (1,442) | (1,536) | (1,626) | (1,676) | (1,666) | (1,655) | (1,643) | (1,626) | (1,614) |
| Actual - % Level of Service  |  | 99.5%   | 101.0%  | 104.2%  | 105.7%                                     | 95.3%   | 95.1%   | 94.4%   | 95.5%   | 97.5%   | 96.6%   | 94.7%   | 86.4%   | 83.7%   | 80.9%   | 79.5%   | 77.9%   | 76.3%   | 75.4%   | 75.6%   | 75.8%   | 76.0%   | 76.3%   | 76.5%   |
| Average - % Level of Service   |  |         |         |         |  |         |         |         |         |         |         |         |         |         | 80.9%   | 79.5%   | 77.9%   | 76.3%   | 75.4%   | 75.6%   | 75.8%   | 76.0%   | 76.3%   | 76.5%   |
| Annual Student Growth Rate (3)                                       |  | -1.57%  | 1.48%   | 3.17%   | 1.45%                                      | 0.20%   | -0.23%  | -0.72%  | 1.20%   | -0.81%  | -0.92%  | -1.97%  | -8.76%  | -3.17%  | -3.30%  | -1.66%  | -2.10%  | -2.03%  | -1.15%  | 0.24%   | 0.25%   | 0.29%   | 0.40%   | 0.27%   |
|  |  |         |         |         | Elementary School #11 opens with 585 seats |         |         |         |         |         |         |         |         |         | Capacity decrease due to change in class size ratios per House Bill 13 (K-3 average class size ratios are 1:20 as directed by State legislative action) |         |         |         |         |         |         |         |         |         |

(1) It is important to note that this reflects the November 15, 2020 date of membership as outlined in by the Schools Adequate Public Facilities Ordinance. It does not include CHCCS students attending the Hospital School.

(2) The Tischler Model provides for the "Linear Method" of projections for both CHCCS and OCS. Original projections used to prior years projection models included the "Linear Extrapolation Method" for CHCCS.

(3) Annual growth rate calculated using actual membership for years 2007-11 through 2020-21 and average membership for years 2021-22 through 2030-31.

(4) Class sizes for grades K-3 = 1:23 for school years 2000 through 2007-08. In accordance with 2005 School Collaboration Work Group direction, effective the 2008-2009 school year with the opening of CHCCS Elementary #10, K-3 class sizes are 1:21 as directed by past State legislative action.

## CHCCS Student Projections (1)

| Middle   |  | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23  | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 |
|--|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| School Year  |  |         |         |         |         |         |         |         |         |         |         |         |         |         |  |         |         |         |         |         |         |         |         |         |
| Actual   |  | 2,708   | 2,722   | 2,753   | 2,785   | 2,858   | 2,861   | 2,844   | 2,829   | 2,833   | 2,933   | 3,044   | 2,917   | 2,802   |  |         |         |         |         |         |         |         |         |         |
| Tischler (2)   |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 2,786  | 2,769   | 2,753   | 2,736   | 2,720   | 2,703   | 2,687   | 2,670   | 2,654   | 2,637   |
| OC Planning  |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 2,753  | 2,687   | 2,618   | 2,550   | 2,485   | 2,437   | 2,410   | 2,387   | 2,388   | 2,385   |
| 10 Year Growth   |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 2,736  | 2,628   | 2,544   | 2,478   | 2,468   | 2,444   | 2,222   | 2,159   | 2,181   | 2,202   |
| 5 Year Growth  |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 2,729  | 2,614   | 2,522   | 2,442   | 2,419   | 2,276   | 2,140   | 2,068   | 2,088   | 2,109   |
| 3 Year Growth  |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 2,709  | 2,573   | 2,465   | 2,375   | 2,330   | 2,167   | 2,021   | 1,948   | 1,968   | 1,987   |
| Average  |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 2,742  | 2,654   | 2,581   | 2,516   | 2,484   | 2,385   | 2,296   | 2,246   | 2,256   | 2,264   |
| Annual Change - Increase (Decrease) in Actual & Projected Membership |  | 11      | 14      | 31      | 32      | 73      | 76      | (17)    | (15)    | 4       | 100     | 111     | (127)   | (115)   | (60)   | (88)    | (74)    | (64)    | (32)    | (99)    | (89)    | (49)    | 9       | 8       |
| Capacity - 100% Level of Service                                     |  | 2,840   | 2,840   | 2,840   | 2,840   | 2,840   | 2,944   | 2,944   | 2,944   | 2,944   | 2,944   | 2,944   | 2,944   | 2,944   | 2,944  | 2,944   | 2,944   | 2,944   | 2,944   | 2,944   | 2,944   | 2,944   | 2,944   | 2,944   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      |  | (132)   | (118)   | (87)    | (55)    | 18      | (83)    | (100)   | (115)   | (111)   | (11)    | 100     | (27)    | (142)   | (202)  | (290)   | (363)   | (428)   | (460)   | (559)   | (648)   | (698)   | (688)   | (680)   |
| 107% Level of Service  |  | 3,039   | 3,039   | 3,039   | 3,039   | 3,039   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150  | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   | 3,150   |
| Number of Students, Actual and Projected, Over (Under) 107% LOS      |  | (331)   | (317)   | (286)   | (254)   | (181)   | (289)   | (306)   | (321)   | (317)   | (217)   | (106)   | (233)   | (348)   | (408)  | (496)   | (570)   | (634)   | (666)   | (765)   | (854)   | (904)   | (894)   | (886)   |
| Actual - % Level of Service  |  | 95.4%   | 95.8%   | 96.9%   | 98.1%   | 100.6%  | 97.2%   | 96.6%   | 96.1%   | 96.2%   | 99.6%   | 103.4%  | 99.1%   | 95.2%   |  |         |         |         |         |         |         |         |         |         |
| Average - % Level of Service   |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 93.2%  | 90.2%   | 87.7%   | 85.5%   | 84.4%   | 81.0%   | 78.0%   | 76.3%   | 76.6%   | 76.9%   |
| Annual Student Growth Rate (3)                                       |  | 0.41%   | 0.52%   | 1.14%   | 1.16%   | 2.62%   | 0.10%   | -0.59%  | -0.53%  | 0.14%   | 3.53%   | 3.78%   | -4.17%  | -3.94%  | -2.13%   | -3.22%  | -2.77%  | -2.48%  | -1.29%  | -3.98%  | -3.75%  | -2.15%  | 0.42%   | 0.38%   |
|  |  |         |         |         |         |         |         |         |         |         |         |         |         |         | Additional 104 new seats at Culbreth Middle School |         |         |         |         |         |         |         |         |         |

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(2) The Tischler Model provides for the "Linear Method" of projections for both CHCCS and OCS. Original projections used to prior years projection models included the "Linear Extrapolation Method" for CHCCS.

(3) Annual growth rate calculated using actual membership for years 2007-11 through 2020-21 and average membership for years 2021-22 through 2030-31.

## CHCCS Student Projections (1)

| High   |  | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23  | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 |
|--|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| School Year  |  |         |         |         |         |         |         |         |         |         |         |         |         |         |  |         |         |         |         |         |         |         |         |         |
| Actual   |  | 3,606   | 3,640   | 3,714   | 3,796   | 3,764   | 3,730   | 3,701   | 3,762   | 3,927   | 3,932   | 3,940   | 3,932   | 3,940   |  |         |         |         |         |         |         |         |         |         |
| Tischler (2)   |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 3,917  | 3,894   | 3,870   | 3,847   | 3,824   | 3,801   | 3,778   | 3,755   | 3,731   | 3,708   |
| OC Planning  |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 3,840  | 3,753   | 3,661   | 3,571   | 3,482   | 3,419   | 3,338   | 3,263   | 3,242   | 3,234   |
| 10 Year Growth   |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 3,918  | 3,877   | 3,824   | 3,753   | 3,577   | 3,501   | 3,426   | 3,311   | 3,212   | 3,093   |
| 5 Year Growth  |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 3,940  | 3,901   | 3,849   | 3,768   | 3,576   | 3,491   | 3,402   | 3,266   | 3,146   | 3,006   |
| 3 Year Growth  |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 3,924  | 3,876   | 3,801   | 3,678   | 3,470   | 3,364   | 3,252   | 3,097   | 2,959   | 2,803   |
| Average  |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 3,908  | 3,860   | 3,801   | 3,723   | 3,586   | 3,515   | 3,439   | 3,338   | 3,258   | 3,169   |
| Annual Change - Increase (Decrease) in Actual & Projected Membership |  | (24)    | 34      | 74      | 82      | (32)    | (66)    | (29)    | 61      | 165     | 5       | 8       | (8)     | 8       | (32)   | (48)    | (59)    | (78)    | (138)   | (70)    | (76)    | (101)   | (80)    | (89)    |
| Capacity - 100% Level of Service                                     |  | 3,835   | 3,875   | 3,875   | 3,875   | 3,875   | 3,875   | 3,875   | 3,875   | 3,875   | 3,875   | 3,875   | 3,875   | 3,975   | 3,975  | 3,975   | 3,975   | 3,975   | 3,975   | 3,975   | 3,975   | 3,975   | 3,975   | 3,975   |
| Number of Students, Actual and Projected, Over (Under) 100% LOS      |  | (229)   | (235)   | (161)   | (79)    | (111)   | (145)   | (174)   | (113)   | 52      | 57      | 65      | (43)    | (35)    | (67)   | (115)   | (174)   | (252)   | (389)   | (460)   | (536)   | (637)   | (717)   | (806)   |
| 110% Level of Service  |  | 4,219   | 4,263   | 4,263   | 4,263   | 4,263   | 4,263   | 4,263   | 4,263   | 4,263   | 4,263   | 4,263   | 4,373   | 4,373   | 4,373  | 4,373   | 4,373   | 4,373   | 4,373   | 4,373   | 4,373   | 4,373   | 4,373   | 4,373   |
| Number of Students, Actual and Projected, Over (Under) 110% LOS      |  | (613)   | (623)   | (549)   | (467)   | (499)   | (533)   | (562)   | (501)   | (336)   | (331)   | (323)   | (441)   | (433)   | (465)  | (512)   | (571)   | (649)   | (787)   | (857)   | (933)   | (1,034) | (1,114) | (1,204) |
| Actual - % Level of Service  |  | 94.0%   | 93.9%   | 95.8%   | 96.0%   | 97.1%   | 96.3%   | 95.5%   | 97.1%   | 101.3%  | 101.5%  | 101.7%  | 98.9%   | 99.1%   |  |         |         |         |         |         |         |         |         |         |
| Average - % Level of Service   |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 98.3%  | 97.1%   | 95.6%   | 93.7%   | 90.2%   | 88.4%   | 86.5%   | 84.0%   | 82.0%   | 79.7%   |
| Annual Student Growth Rate (3)                                       |  | -0.66%  | 0.94%   | 2.03%   | 2.21%   | -0.84%  | -0.90%  | -0.78%  | 1.65%   | 4.39%   | 0.13%   | 0.20%   | -0.20%  | 0.20%   | -0.82%   | -1.22%  | -1.53%  | -2.05%  | -3.69%  | -1.97%  | -2.17%  | -2.93%  | -2.40%  | -2.74%  |
|  |  |         |         |         |         |         |         |         |         |         |         |         |         |         | Phoenix Academy High School becomes official high school starting 2010-11 school year with 40 student capacity |         |         |         |         |         |         |         |         |         |
|  |  |         |         |         |         |         |         |         |         |         |         |         |         |         | 100 seats added to CHHS for the 2020-2021 school year  |         |         |         |         |         |         |         |         |         |

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(3) Annual growth rate calculated using actual membership for years 2011-12 through 2020-21 and average membership for years 2021-22 through 2030-31.



