

ORANGE COUNTY
BOARD OF EDUCATION

AGENDA ITEM ABSTRACT

Meeting Date: May 2, 2011

AGENDA ITEM No. 11-05-15

ACTION ITEM (Y/N) N

SUBJECT: Student Reassignment Discussion #4

INFO. CONTACT Dr. George McFarley, Jr. PHONE: 919-732-8126

ATTACHMENTS:

1. Schools Adequate Public Facilities Ordinance 2011 Annual Report.

PURPOSE: To allow the Board of Education an opportunity to discuss the student reassignment study being conducted by the Operations Research and Education Laboratory (ORED).

BACKGROUND: The last student reassignment was conducted in Orange County Schools (OCS) in 2005-2006. In April, 2010, OCS contracted with N.C. State's ORED to use their software and processes to conduct a reassignment study. On November 22, 2010 members of the ORED staff made a presentation to the Board to discuss likely criteria for the student reassignment study. The following major items were presented for discussion:

- Historical ADM and cohort survival ratio analysis
- System-level forecast models
- Land use study interview findings
- GIS subdivision analysis
- Out of capacity worksheets (present and future)
- Optimization preliminary findings

Reassignment was again discussed by the Board on December 6, 2010. In 2011, the Superintendent recommended delaying reassignment one year. Since that time, ORED has reviewed its findings and also compared Month 1 ADM with Month 6 ADM. Here are some of their observations and thoughts:

- New Hope gained 11 students since Month 1 and is now at 100% of its capacity of 586.
- Central has gained 12 students since Month 1.
- Grady Brown has gained 7 students since Month 1.
- Pathways has gained 3 students since Month 1.
- Efland-Cheeks has experienced no gain.
- Cameron Park has gained 10 students since Month 1; therefore, it has met ORED's projected growth for next year at 624 (while capacity is 565). The projection will be at 115% over capacity by 2014-2015.

The total growth experienced in OCS K-5 schools between August 2010 and February 2011 has exceeded ORED's forecast for 2011-2012.

Previous Board of Education discussions included year-round options, thematic programs, travel distance, the transfer policy, student achievement, short and long-term solutions, etc.

FINANCIAL IMPACT: ORED has spent 90% of the project fund to this date. The ORED contracted project cost was \$27,000.

RECOMMENDATION: The Superintendent recommends the Board of Education establish a subcommittee to study various options which may impact the reassignment process.

*Presented
to BOCC
April 5, 2011*

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
2011

(BASED ON NOVEMBER 2010 DATA)

CERTIFIED BY THE BOCC ON XXXXX

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2011 SAPFOTAC Executive Summary

I. Base Memorandum of Understanding

A. Level of Service.....(No Change).....Pg. 1

	<i>Chapel Hill/Carrboro School District</i>	<i>Orange County School District</i>
<i>Elementary</i>	105%	105%
<i>Middle</i>	107%	107%
<i>High</i>	110%	110%

B. Building Capacity and Membership.....(Change).....Pg. 2

	<i>Chapel Hill/Carrboro School District</i>			<i>Orange County School District</i>		
	Capacity	Membership	Increase from Prior Year	Capacity	Membership	Increase from Prior Year
<i>Elementary</i>	5244	5296	77	3694	3285	74
<i>Middle</i>	2840	2722	14	2166	1698	33
<i>High</i>	3875	3640	34	2558	2222	5

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

II. Annual Update to SAPFO System

A. Capital Investment Plan (CIP).....(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 2010-11 School Year – Chapel Hill Carrboro City Schools

(The number in brackets [n] is the number of students the projection was off compared to actual membership. A number in parenthesis within the brackets [(n)] indicates the projection was low compared to the actual whereas a number not in parenthesis indicates the projection was high compared to the actual.)

	Actual 2010 Membership	Year Projection Made for 2010-11Membership				
		2005-06	2006-07	2007-08	2008-09	2009-10
<i>Elementary</i>	5296	5518 [222]	5541 [245]	5603 [307]	5533 [237]	5381 [85]
<i>Middle</i>	2722	2921 [199]	2833 [111]	2853 [131]	2826 [104]	2742 [20]
<i>High</i>	3640	3789 [149]	3704 [64]	3777 [137]	3732 [92]	3662 [22]

Analysis of 5 Years of Projections for 2010-11 School Year – Orange County Schools						
(The number in brackets [n] is the number of students the projection was off compared to actual membership. A number in parenthesis within the brackets [(n)] indicates the projection was low compared to the actual whereas a number not in parenthesis indicates the projection was high compared to the actual.)						
		Year Projection Made for 2010-11 Membership				
	Actual 2010 Membership	2005-06	2006-07	2007-08	2008-09	2009-10
Elementary	3285	3269 [(16)]	3245 [(40)]	3385 [100]	3234 [(51)]	3254 [(31)]
Middle	1698	1682 [(16)]	1697 [(1)]	1689 [(9)]	1679 [(19)]	1711 [13]
High	2222	2138 [(84)]	2183 [(39)]	2237 [15]	2208 [(14)]	2236 [14]

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

Average Annual Growth Rate over 10 Years										
	Chapel Hill/Carrboro School District					Orange County School District				
	2006-07	2007-08	2008-09	2009-10	2010-11	2006-07	2007-08	2008-09	2009-10	2010-11
<i>Elementary</i>	2.03%	1.85%	1.5%	1.72%	1.44%	1.49%	1.84%	1.16%	1.34%	1.57%
<i>Middle</i>	2.35%	2.58%	2.03%	1.93%	1.67%	1.42%	1.78%	1.44%	1.53%	1.84%
<i>High</i>	2.04%	2.31%	2.21%	1.8%	1.57%	0.98%	1.49%	1.0%	1.38%	1.59%

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

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

CHAPEL HILL/CARRBORO SCHOOL DISTRICT

Elementary School District

- A. Does not exceed 105% LOS standard (current LOS is 101%).
- B. The projected growth rate at this level is expected to increase at a lesser rate over the next 10 years.
- C. Due partially to reduced class size capacities going into effect in 2008 with the opening of Morris Grove Elementary, the projections are showing a need for Elementary School #11 in 2013-14 by a projected overcapacity of 51 students.

Middle School District

- A. Does not currently exceed 107% LOS standards (current LOS is 95.8%).
- B. The projected growth rate at this level is expected to increase at a lesser rate over the next 10 years.
- C. Chapel Hill/Carrboro Middle School #5 is projected to be needed in 2018-19.

High School District

- A. Does not currently exceed the 110% LOS standard (current LOS is 93.9%).

- B. The projected growth rate at this level is expected to increase at a lesser rate over the next 10 years.
- C. Beginning this school year, Phoenix Academy High School became an official high school within the district with a capacity of 40 students.
- D. Expansion of Carrboro High School from the initial capacity of 800 students to the ultimate capacity of 1,200 students is no longer projected to be needed in the 10 year projection time frame.

ORANGE COUNTY SCHOOL DISTRICT

Elementary School District

- A. Does not currently exceed 105% LOS standard (current LOS is 88.9%).
- B. The projected growth rate at this level is expected to increase at a greater rate over the next 10 years.
- C. Does not affect or prompt CIP activity in 10-year timeframe. However, staff is monitoring new development activity in the Orange County portion of Mebane, which is not a party to the Schools APFO MOU at this time.

Middle School District

- A. Does not currently exceed 107% LOS standard (current LOS is 78.4%).
- B. The projected growth rate at this level is expected to increase at a greater rate over the next 10 years.
- C. Does not affect or prompt CIP activity in 10-year time frame. However, staff is monitoring new development activity in the Orange County portion of Mebane, which is not a party to the Schools APFO MOU at this time.

High School District

- A. Does not currently exceed 110% LOS (current LOS is 86.9%).
- B. The projected growth rate at this level is expected to increase at a greater rate over the next 10 years.
- C. Does not affect or prompt CIP activity in 10-year time frame. However, staff is monitoring new development activity in the Orange County portion of Mebane, which is not a party to the Schools APFO MOU at this time.

ORANGE COUNTY
BOARD OF COMMISSIONERS

ACTION AGENDA ITEM ABSTRACT

Meeting Date: April 5, 2011

Action Agenda
Item No. 5-h

SUBJECT: Schools Adequate Public Facilities Ordinance (SAPFO) – Receipt and Transmittal of 2011 Annual Technical Advisory Committee Report

DEPARTMENT: Planning & Inspections

PUBLIC HEARING: (Y/N)

No

ATTACHMENT(S):

1. SAPFO Partners Transmittal Letter
2. *Draft 2011 SAPFOTAC Annual Report (Under Separate Cover)*

INFORMATION CONTACT:

Shannon Berry, 245-2589
Craig Benedict, 245-2592

PURPOSE: To receive the 2011 Annual Report of the SAPFO Technical Advisory Committee (SAPFOTAC) and transmit it to the SAPFO partners for comments before certification in June 2011.

BACKGROUND:

1. Annual Report;

Each year the SAPFOTAC Report is updated to reflect actual changing conditions of student membership and school capacity. This information is analyzed and used to project future school construction needs based on adopted levels of service standards. There are two steps to the full report. The first part (Student Membership and Capacity) is certified in the fall and then this full report, in the spring of each year, is to keep the SAPFO system calibrated. At the December 6, 2010 Board of County Commissioners meeting, the Board approved the November 15, 2010 actual membership and capacity numbers (i.e. first part) for both Orange County Schools (OCS) and Chapel Hill-Carrboro City Schools (CHCCS). The BOCC approved revised OCS membership and capacity numbers at the February 1, 2011 meeting.

A draft of the full annual SAPFOTAC Report is complete and has been reviewed by the SAPFOTAC members.

2. SAPFOTAC:

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

3. Membership Data:

CHCCS total increase from the previous year: 125 students

77 Elementary School

14 Middle School

34 High School

OCS total increase from the previous year: 112 students

74 Elementary School

33 Middle School

5 High School

() denotes decrease

4. Capacity Data:

There were no changes to school capacities this year for Orange County Schools. There was an increase in capacity of 40 seats at the high school level within the Chapel Hill-Carrboro City Schools district as Phoenix Academy High School became an official high school beginning this school year.

5. Capacity Issues

SAPFO vs. DPI

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

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

OCS does not exceed the adopted levels of service and projections do not show a need for new schools in the 10-year planning period.

6. Student Projection Analysis

Student membership projections show an increase at all levels in both school systems, except for slight drops in 2012-13 and 2018-2019 at the high school level for OCS. The projections are shown on pages 36-37 of the report.

7. Orange County Schools Systems – CIP Needs Analysis

CHCCS

Projected needs:

New Elementary #11 2013-2014 (projected overage of 51 students; 106% LOS)

New Middle School #5 2018-2019 (projected overage of 100 students; 110.5% LOS)

High School projections show no needs in the next 10 years

OCS

Projected needs:

None for Elementary, Middle or High School in the next 10 years

The SAPFOTAC report notes that development approval activity within the portion of the City of Mebane that lies within Orange County has been significant in past years. Because the City of Mebane is not a party to the SAPFO at this time, CAPS are not required by the local government to be issued prior to development approvals. However, once students generated from Mebane development actually enter the school system, faster enrollment increases would affect projections and may identify CIP needs within 10 years, unless enrollment is balanced by slower growth in other areas of the district.

8. Student Generation Rates

On October 6, 2009, the Orange County Board of Commissioners approved the updated Student Generation Rates, as recommended by the SAPFOTAC. The updated Student Generation Rates became effective this school year with the November 15, 2010 CAPS system update. These new rates generally show higher student generation rates for various housing types (see page 42 of attached report for student generation rates).

9. Access to Full Report

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

It is anticipated the draft 2011 SAPFOTAC report will be brought back to the BOCC for certification at the June 7, 2011 regular meeting.

FINANCIAL IMPACT: Current 10-year student growth projections show future needs for additional schools in the CHCCS District. CHCCS Elementary School #11 is projected to be needed in 2013-14 and CHCCS Middle School #5 is projected to be needed in 2018-19.

Section 7 of the Schools Adequate Public Facilities Memorandum of Understanding (MOU) states, "Orange County will use its best efforts to provide the funding to carry out the Capital Improvement Plan referenced in Section 1 above."

RECOMMENDATION(S): The Manager recommends the Board:

1. Receive the 2011 SAPFOTAC Annual Report; and
2. Authorize the Chair to sign the transmittal letter to SAPFO partners provided at Attachment 1.