

Supporting the mission of Chapel Hill-Carrboro City Schools and Orange County Schools to build an inclusive school community that engages, empowers, and inspires students and provides an education that addresses the social, emotional, intellectual, and physical needs of every student.

2023

LONG-RANGE FACILITIES OPTIMIZATION PLAN



WOOLPERT

November 22, 2023





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Recommendations that strategically and responsibly invest in facilities to impact the greatest number of students. Investing in school facilities directly impacts student learning, student and staff health, and community vitality.



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EXECUTIVE SUMMARY

This Long-Range Facilities Optimization Plan supports the mission of Chapel Hill-Carrboro City Schools (CHCCS) and Orange County Schools (OCS) to build an inclusive school community that engages, empowers, and inspires students and provides an education that addresses the social, emotional, intellectual, and physical needs of every student.

This plan provides guidance to county and district leadership in making decisions to adequately fund facility improvements while working within fiscal realities. Investing in school facilities directly impacts student learning, student and staff health, and community vitality.

APPROACH AND FINDINGS

To understand existing conditions and create an actionable plan, Orange County engaged Woolpert to lead an assessment and master planning program for CHCCS and OCS school districts. Facility condition assessments provide the baseline for school district master planning to effectively prioritize capital improvement projects that maximize return on investment and the student environment.

The components of the portfolio analysis included the facility condition assessments, educational adequacy assessments, enrollment, and capacity of 39 school and administrative facilities in CHCCS and OCS. The data was compiled to understand the overall condition and needs of the individual facilities to develop options and a final recommendation. Assessment information can be found in the *2023 State of Facilities Report*.

RECOMMENDED OPTIONS

Recommended options were developed after analyzing components of each district's portfolio of schools, including grade configuration, geography, facility condition, educational program needs, proximity of schools to one another, enrollment, utilization, and other relevant elements.

This information was organized and analyzed in various options ranging from minimum viable repairs through potential renovations and replacement. The options were vetted through an iterative process with leadership from Orange County, CHCCS, and OCS. Based on the feedback received from the stakeholders, a final recommendation was compiled for consideration.

FINAL RECOMMENDATION

Woolpert recommends that Orange County pursue a long-term plan that prioritizes replacing the oldest, smallest, least educationally adequate facilities with newer facilities appropriately sized and arranged to support modern teaching and learning standards. The recommendation recognizes that many facilities will never catch up on their backlog of deferred maintenance, and even if that was feasible, it would not be advisable. Several of the oldest schools are not large enough to be financially self-sustaining given today's standards, nor are they designed with modern teaching and learning in mind. If a facility is inadequate to continue educating students over the coming decades and has significant condition needs, planning to replace the school when possible makes the best financial and educational sense.

COST. The recommendation calls for \$1 billion investment over 15 years. While a significant sum of money by any standard, the Facility Condition Assessment identified \$1 billion in total condition needs over the next ten years. Only addressing these facility condition needs would do nothing to increase operational efficiency or educational adequacy. This plan prioritizes replacements and renovations over merely addressing maintenance needs.

PHASING. The plan can be best achieved through three five-year construction phases prioritized by district leadership and designed to minimize student disruption and costs during construction.

FINAL RECOMMENDATION – COSTS PER PHASE

	CHCCS	OCS	Total
Phase 1	\$249.2M	\$179.2M	\$428.4M
Phase 2	\$167.0M	\$181.5M	\$348.5M
Phase 3	\$130.7M	\$103.2M	\$233.9M
Total	\$546.9M	\$463.9M	\$1,010.8M

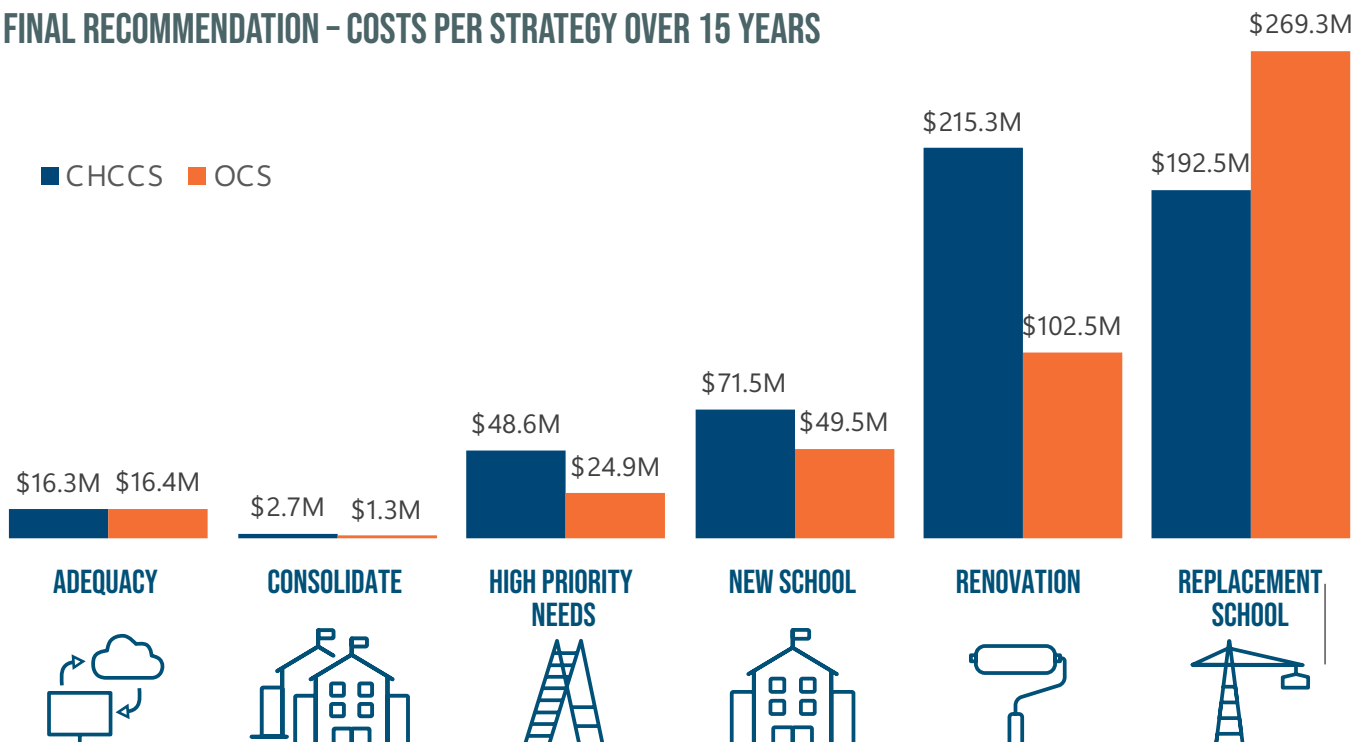
STRATEGIES. The plan is organized around six distinct strategies:

1. Adequacy – school facilities that lack key learning and support spaces relative to design standards.
2. Replacement School – schools that need to be rebuilt because of their condition, educational adequacy, or utilization.
3. Renovation – schools would receive renovations to provide interior spaces more closely aligned to current design standards.
4. New School – new schools are recommended when needed to alleviate over capacity and where growth is occurring and anticipated to continue.
5. High Priority Needs – addresses the highest priority needs for facilities that are not being renovated or replaced.
6. Consolidate – combines two schools into a single facility.

PRIMARY BENEFITS

- Enhanced teaching and learning environments advance educational outcomes and opportunities
- Improved school utilization provides students the flexible spaces necessary for multiple learning styles
- Updated classroom spaces and learning tools that meet today's education standards
- A right-sized portfolio creates operational efficiencies
- Investing in the community attracts and retains residents by providing competitive schools

FINAL RECOMMENDATION – COSTS PER STRATEGY OVER 15 YEARS



Public school facilities that are well planned, designed, built, operated, and maintained have an outsized positive impact on education, health, the natural environment, and our communities



01

INTRODUCTION



OVERVIEW

Orange County, Chapel Hill-Carrboro City Schools (CHCCS), and Orange County Schools (OCS) have embarked on a monumental task of evaluating the condition, adequacy, and locations of their 39 campuses to develop a comprehensive Long-Range Facilities Optimization Plan to improve the condition of school facilities for their students and community. Orange County is responsible for the 3.8 million square feet of facilities at 39 campuses that make up CHCCS and OCS.

School facilities have a direct impact on student learning, student and staff health, and community. The 2021 State of Our Schools Report¹ uses the best available school district fiscal data about U.S. elementary and secondary (pre-kindergarten through twelfth grade) to analyze the state of public school facilities. The report finds that the gap between expenditures and good stewardship of facilities continues to increase. The research performed estimates the nation is under-investing in school buildings and grounds by \$85 billion each year.

Public School facilities are the second largest infrastructure behind highways. However, unlike transportation, which has most of its capital costs paid from federal and state sources, local school districts bear most of the responsibility for school construction capital funding. Each school day, nearly one-sixth of the U.S. population spends their day in a public school building.

Public school facilities that are well planned, designed, built, operated, and maintained have an outsized positive impact on education, health, the natural environment, and our communities. Historically, research has concluded a relationship between the condition of school facilities and educational outcomes. Schools with proper indoor air quality, natural lighting, and temperatures have shown to improve the student and teacher experience and productivity.

All facilities deteriorate with time and use. Major building systems, components, furniture, fixtures, and equipment need upgrades and replacement. Older schools need modernization (and sometimes replacement) to meet current standards and support modern educational programs and services. School districts need periodic large capital investments for these critical capital projects.

PURPOSE

This Long-Range Facilities Optimization Plan provides a long and short-term strategic investment plan. This plan will lay out recommended investments in each school as well as a suggested timeline. The final recommendation is intended to be actionable and achievable given the current state of CHCCS and OCS facilities.

The Long-Range Facilities Optimization Plan supports the missions of CHCCS “to build an inclusive school community that engages, empowers, and inspires students,” and OCS “to provide an education that addresses the social, emotional, intellectual, and physical needs of every student.”

STRATEGIES

This Long Range Facilities Optimization Plan organizes its recommendations around six distinct strategies:

1. ADEQUACY



Adequacy refers to the degree to which school facilities lack key learning and support spaces relative to North Carolina Department of Public Instruction (NCDPI) design standards and the degree to which learning and support spaces are less than 90% the size called for in the NCDPI standards. This strategy does not include schools recommended for major renovation or replacement.

2. REPLACEMENT SCHOOL



The plan recommends schools for replacement based on their condition, educational adequacy, and utilization. These schools would be rebuilt on the same or adjacent sites.

3. RENOVATION



Facilities recommended for renovation would not be fully rebuilt, but rather receive renovations to provide interior spaces more closely aligned to current NCDPI standards.

4. NEW SCHOOL



New schools are recommended when needed to alleviate over capacity and where growth is occurring and anticipated to continue.

5. HIGH PRIORITY NEEDS



This strategy is used to address the highest priority needs for facilities that are not being renovated or replaced. The high priority needs strategy does not include all ongoing capital renewal needs identified in the Facility Condition Assessment.

6. CONSOLIDATE



This strategy combines two schools into a single facility.

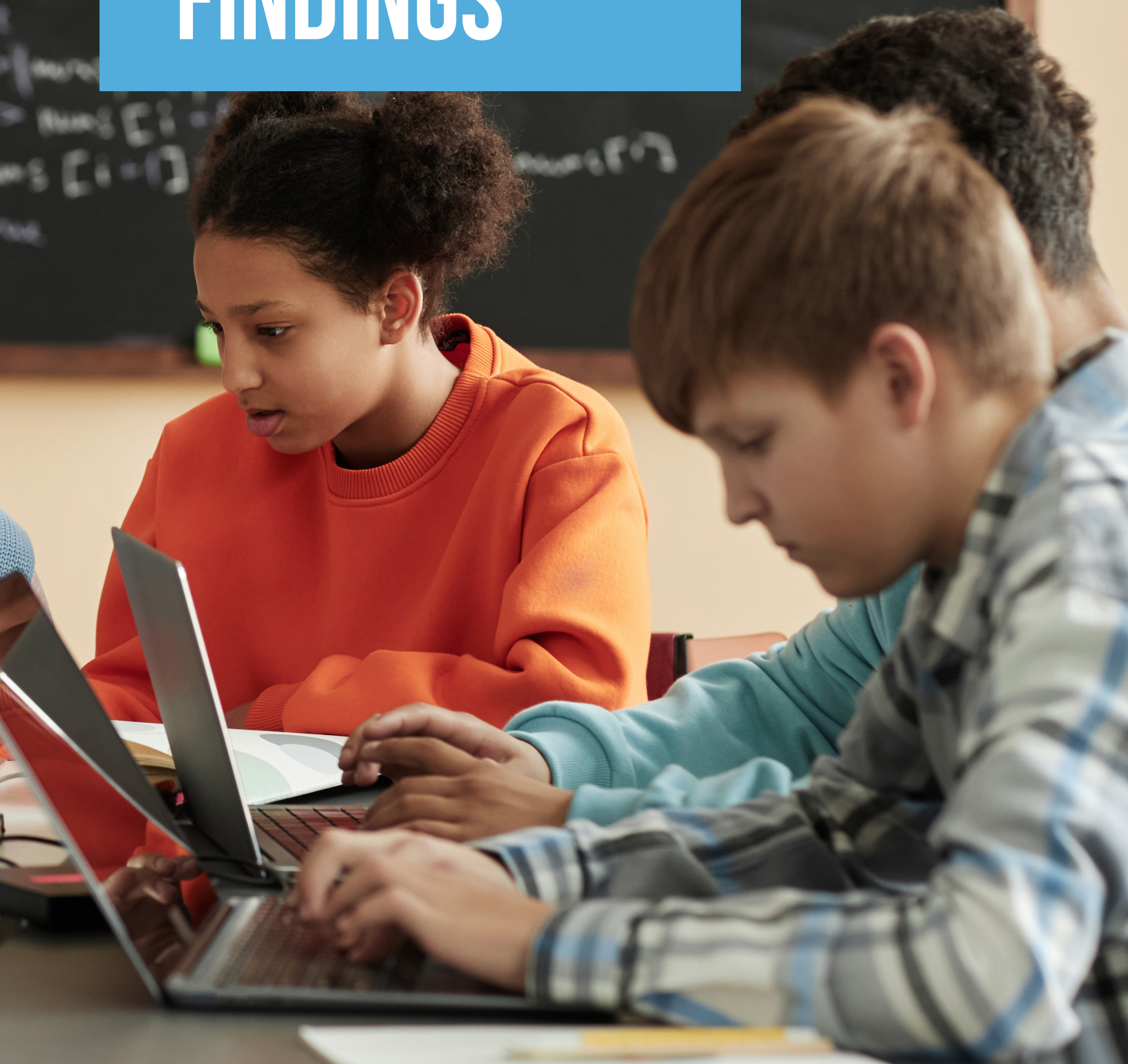
¹. Filardo, Mary. 2021 State of Our Schools: America's PK-12 Public School Facilities 2021. Washington, D.C.: 21st Century School Fund.

Considering condition, capacity, utilization, educational adequacy, and funding to create a comprehensive plan



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APPROACH AND FINDINGS



The Long-Range Facilities Optimization Plan provides guidance to county and district leadership in making decisions to adequately fund facility improvements while working within fiscal realities. Ultimately, the plan provides opportunities for learning to occur in warm, cool, safe, and dry facilities and provide strategic updates to learning spaces. To better understand existing conditions and create an actionable plan, a comprehensive assessment and planning process were undertaken. Assessment information can be found in the *2023 State of Facilities Report*.

The facility plan for CHCCS and OCS considers the condition, capacity, utilization, educational adequacy, and funding to create a comprehensive plan. To create a successful plan, condition, adequacy and demographic information was organized and analyzed in various options ranging from minimum viable repairs through potential renovations and replacement.

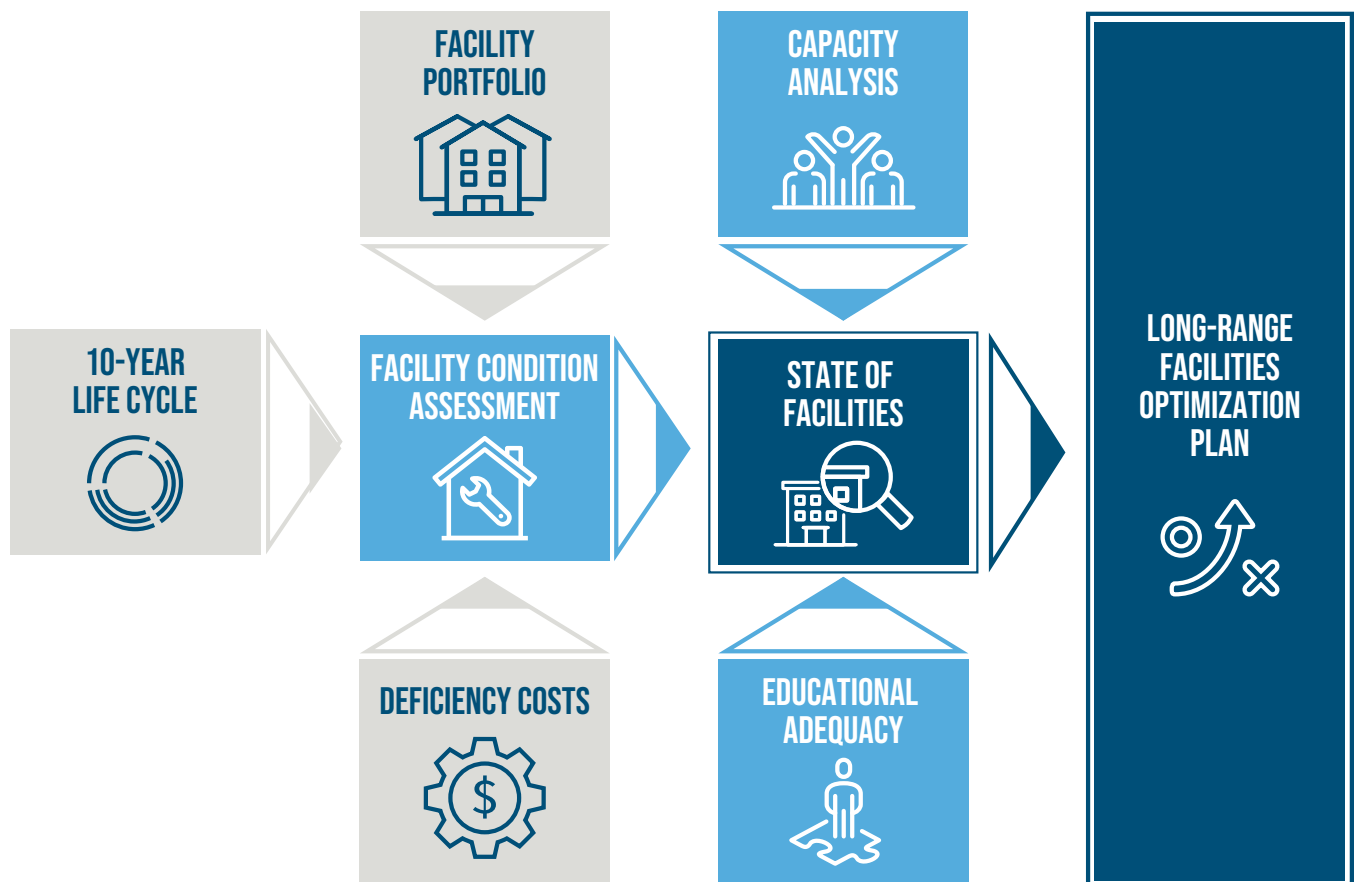
The options were vetted through an iterative process with leadership from Orange County, CHCCS, and OCS. Based on the feedback received from the stakeholders, a final recommendation was compiled for consideration. This report outlines the four options considered in each district.

The final recommendation considers the facility needs for students across both districts. It aims to promote good facility stewardship and educationally appropriate learning environments for all students.

As shown in Figure 2-1, the comprehensive data collection leads to a series of options and a final recommendation that considers the best return on investment for the residents and students of Orange County based on the following key planning questions:

- Given the condition needs of each building relative to its replacement cost, should it be maintained, renovated, or replaced?
- Given population trends relative to school capacity, does Orange County need the same, more, or fewer facilities?
- Given the size and adequacy of this building, would a renovated facility be a viable option that is able to educate students for decades to come?
- Overall, what is the best strategy to make certain every student in every community has access to safe and educationally adequate schools?

Figure 2-1: Long-Range Facility Optimization Plan Process



OPTION DEVELOPMENT

The development of a Long-Range Facility Optimization Plan analyzes components of a district’s portfolio of schools based on grade configuration and geography. Considerations include facility condition, educational program needs, proximity of schools to one another, enrollment, utilization, and other relevant components. The recommendation for each grade configuration took into consideration their collective enrollment, capacity, and program goals and were deemed as one planning unit.

SUMMARY OF FINDINGS

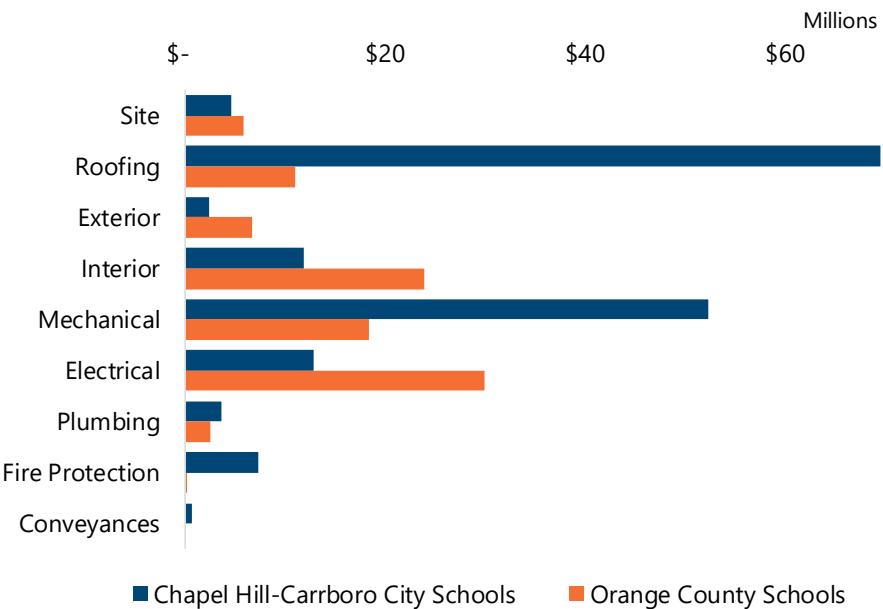
The components of the portfolio analysis included the facility condition assessments, educational adequacy assessments, enrollment, and capacity of 39 school and administrative facilities in CHCCS and OCS. The data was compiled to understand the overall condition and needs of the individual facilities to develop options and final recommendations.

The facility condition assessment findings contain detailed information associated with each building component, including the overall condition of school facilities, as well as life cycle forecasting information that attempts to identify future building and system needs. Information collected during the educational adequacy assessment included an inventory of facility features that support the learning environment and an inventory of space types and sizes.

FACILITY CONDITION ASSESSMENT

Over the next five years, identified deficiencies and life cycle renewal needs are expected to reach more than \$498 million. Facility condition assessments revealed \$262.8 million in current facility deficiency costs and the projected five-year life cycle renewal needs are estimated to be \$235.7 million. Considering CHCCS and OCS average campus age is 46 years, many of the building systems in the state are nearing or have exceeded the end of their useful lives. Figure 2-2 shows the current deficiencies for CHCCS and OCS by building system.

Figure 2-2: CHCCS and OCS Facility Deficiencies by Building System



DEFICIENCY PRIORITY LEVELS

Facility deficiencies have been categorized into different priority levels, ranging from Priority 1 to Priority 5, with Priority 1 being the most urgent and critical to address. Priorities are assigned based on the importance of building components and systems in keeping the facility operational.

PRIORITY 1 - CRITICAL. If these components are inoperable or expected to fail in the near term, it may directly affect the facility’s ability to remain open or deliver the mission. These deficiencies typically relate to building safety systems.

PRIORITY 2 - ESSENTIAL. Inoperability or failure of these components will cause damage to other building systems if not addressed in the near future. For example leaking or failing roofs.

PRIORITY 3 - NECESSARY. These deficiencies are necessary to the facility’s mission but may not require immediate attention. These items should be considered improvements required to maximize facility efficiency and usefulness.

PRIORITY 4 - SUGGESTED. Systems or components that may be considered improvements to the environment. The improvements may be aesthetic or provide improved functionality.

PRIORITY 5 - IMPROVEMENTS. Items are aesthetic in nature and include repainting, re-carpeting, or signage.

FACILITY CONDITION INDEX

The Facility Condition Index (FCI) is an industry recognized formula that provides a way to understand the condition of the facility rather than the total need of that facility. The FCI provides a metric to compare dissimilar facilities across a portfolio (Figure 2-3). A five-year FCI was calculated by combining the current deficiencies and five-year needs to anticipate the overall condition of facilities. The five-year FCI at both CHCCS and OCS (Figure 2-4) indicates that most of the schools are in good to average condition.

A ten-year FCI was calculated by combining the current deficiencies and ten-year needs to anticipate the overall condition of facilities in the long-term. The ten-year FCI (Figure 2-5) shows how the facilities will continue to degrade; while in the next five years schools are in generally good to average condition, but in ten years, facilities are anticipated to be in below average to poor condition with some replacement candidates.

Figure 2-3: FCI Rating Scale

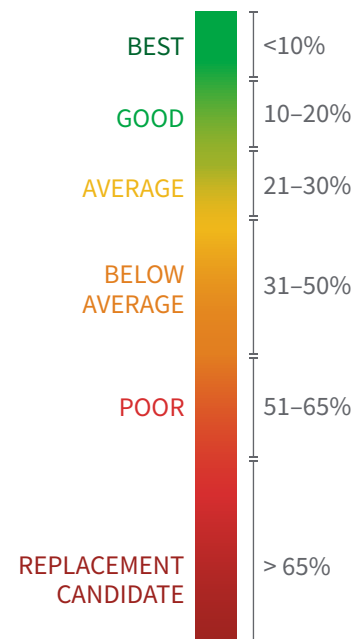


Figure 2-4: OCS and CHHCS Five-Year Facility Condition Index Ranges

5-YEAR FCI		CHCCS		OCS		Orange County	
		Campus	Area (SF)	Campus	Area (SF)	Campus	Area (SF)
Best	<10%	1	78,012	1	270,229	2	348,241
Good	11-20%	5	812,018	9	327,559	14	1,139,577
Average	21-30%	8	831,556	4	554,862	12	1,386,418
Below Average	31-50%	5	537,866	4	375,558	9	913,424
Poor	51-65%	0	-	0	-	0	-
Replace	>65%	0	-	1	12,704	1	12,704
Total		19	2,259,452	19	1,540,912	38	3,800,364

Figure 2-5: OCS and CHHCS Ten-Year Facility Condition Index Ranges

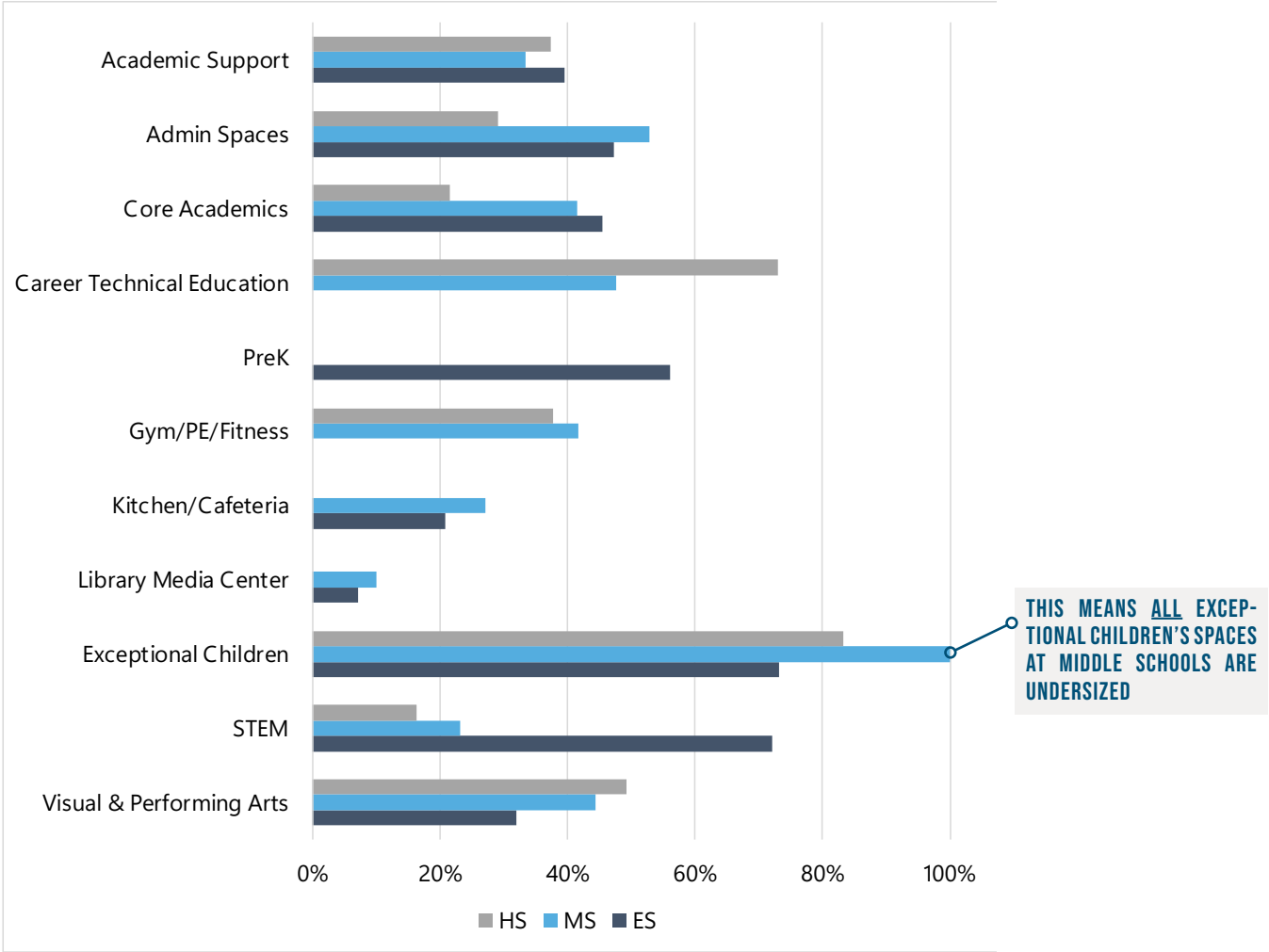
10-YEAR FCI		CHCCS		OCS		Orange County	
		Campus	Area (SF)	Campus	Area (SF)	Campus	Area (SF)
Best	<10%	0	-	0	-	0	-
Good	11-20%	1	320,328	1	270,229	2	590,557
Average	21-30%	1	109,100	3	34,879	4	143,979
Below Average	31-50%	7	914,638	6	413,898	13	1,328,536
Poor	51-65%	7	627,262	7	707,116	14	1,334,378
Replace	>65%	3	288,124	2	114,790	5	402,914
Total		19	2,259,452	19	1,540,912	38	3,800,364

IN 10 YEARS, MOST SCHOOLS WILL MOVE TO BELOW AVERAGE, POOR, AND REPLACE CONDITIONS

EDUCATIONAL ADEQUACY ASSESSMENT

The adequacy assessment indicates that in general most schools have the required types of spaces; however, many of the spaces are undersized. At CHCCS over 70 percent of the exceptional children’s classrooms and over 50 percent of core classrooms are undersized based on today’s standards. At OCS, approximately 70 percent of the exceptional children’s classrooms, over 20 percent of the core classrooms at the elementary and middle schools, and over 50 percent at the high schools are undersized. These findings are understandable, given the average age of the facilities.

Figure 2-6: CHCCS and OCS: **Present but Undersized** Spaces



UTILIZATION

The utilization of a school is determined by dividing the current enrollment by the calculated capacity of a facility. The utilization of individual schools varies across the districts and by school type. Industry best practices suggest an ideal school utilization between 80 and 100 percent. At CHCCS, the average utilization for elementary schools is 82 percent, middle schools are 96 percent utilized, and high schools are 103 percent utilized. At OCS, the average utilization for elementary schools is 80 percent, middle schools are 70 percent utilized, and high schools are 90 percent utilized. While the average utilization generally falls within the ideal range, individual school utilization falls outside that range.

Figure 2-7: Capacity vs. Enrollment at CHCCS

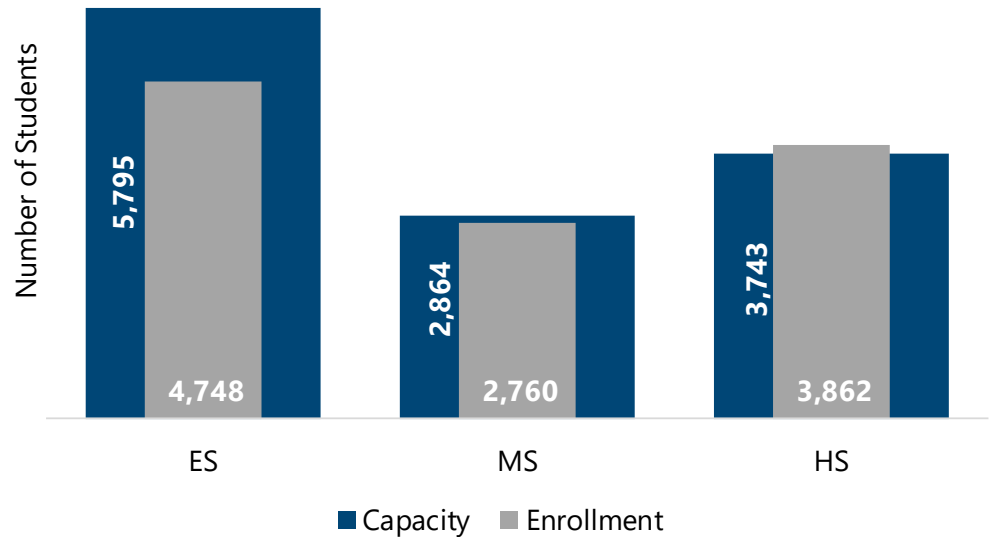
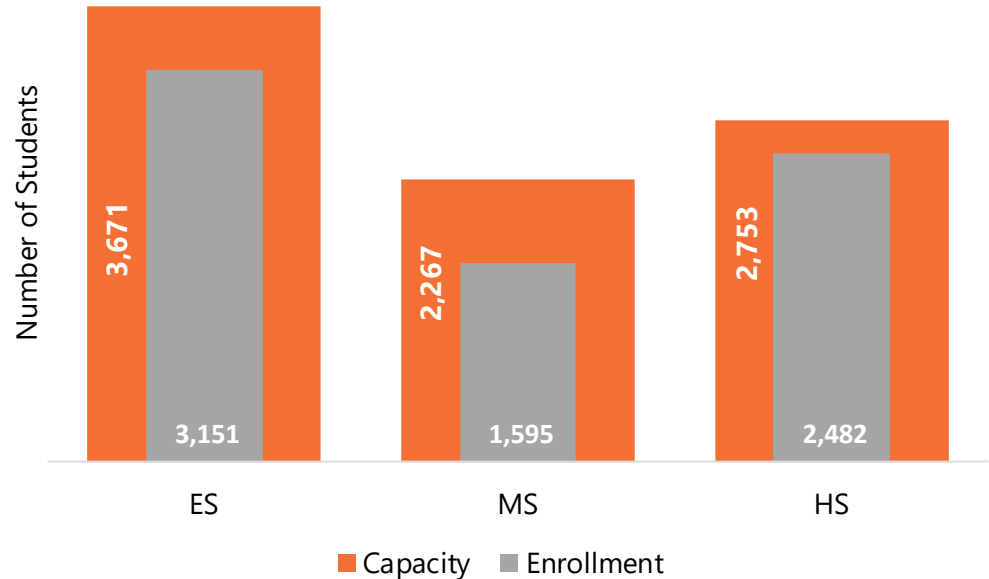


Figure 2-8: Capacity vs. Enrollment at OCS



Comparing options to determine the best path forward for CHCCS



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CHCCS OPTIONS

OPTION A – COMFORTABLE AND SAFE

5-YEAR INVESTMENT: \$139.7M @ \$27.9M/YEAR

OVERVIEW

Option A provides for high priority repairs and system replacements that address building systems that keep students and occupants warm, cool, safe, and dry.

TIMELINE

Option A addresses only near term facility requirements. This option should be executed over the next 5 years, which is approximately \$27.9 million per year.

PROS

- Smallest investment option
- Addresses 20 percent of facility needs

CONS

- No improvement to educational environment
- No improvement to capacity
- No new or renovated schools
- Many facility needs not addressed

OPTION B – COMFORTABLE AND SAFE, PLUS 10-YEAR FACILITY NEEDS

10-YEAR INVESTMENT: \$675.1M @ \$67.5M/YEAR

OVERVIEW

Option B addresses all building needs identified in the facility condition assessment. This option brings the facility conditions to a like new state. However; there is no change to the educational spaces or adequacy of the schools.

TIMELINE

Option B addresses anticipated facility needs of the next ten years. This option should be executed over the next 10 years, which is approximately \$67.5 million per year.

PROS

- Addresses all facility needs

CONS

- No improvement to educational environment
- No improvement to capacity
- No new or renovated schools
- Largest investment option

CHCCS OPTIONS SUMMARY

OPTION	INVESTMENT	TIMELINE	COST/YEAR
OPTION A	\$139.7 M	5 YEARS	\$27.9 M
OPTION B	\$675.1 M	10 YEARS	\$67.5 M
OPTION C	\$325.2 M	10 YEARS	\$32.5 M
OPTION D	\$546.9 M	15 YEARS	\$36.5 M

OPTION C – COMFORTABLE AND SAFE, PLUS UPGRADED LEARNING TOOLS

10-YEAR INVESTMENT: \$325.2M @ \$32.5M/YEAR

OVERVIEW	Option C addresses the high priority facility needs and improves the educational learning environment through school renovations, replacements, and educational adequacy improvements.
TIMELINE	Option C addresses high priority facility needs, adequacy improvements, and school renovations and replacements. This option should be executed over 10 years at approximately \$32.5 million investment annually.
PROS	<ul style="list-style-type: none">Improves the learning environment by providing students and teachers modern classrooms and tools at the schools in the most needSchool replacements address capacity needs by building facilities that meet the current and future enrollment projections, the district will improve operational efficiencies.Mid-range cost option only slightly higher than Option A that addresses only the basic facility needs.
CONS	<ul style="list-style-type: none">Only the schools with the greatest need will gain new modern learning spaces and tools. Some older schools may reach the end of their useful life before the construction program is complete.

OPTION D – COMFORTABLE AND SAFE, PLUS NEW CONSTRUCTION

15-YEAR INVESTMENT: \$546.9M @ \$36.5M/YEAR

OVERVIEW	Option D takes a strategic approach to addressing the district’s portfolio needs through repairs, renovations, and replacements. Option D provides for a long-term plan that moves CHCCS out of its current aged and educationally insufficient portfolio and into facilities that meet current and future educational and programmatic needs of the district.
TIMELINE	Option D is a significant investment in the future of CHCCS. In order to complete this option, it is recommended to implement over the next 15 years with an annual investment of approximately \$36.5 million.
PROS	<ul style="list-style-type: none">Improves the learning environment by providing students and teachers with modern classrooms and tools.School replacements address capacity needs and improve the learning environment for the students of CHCCS. Replacement schools were identified based on their condition, educational adequacy, and utilization.Consolidating schools reduces the overall size of the CHCCS portfolio, which improves operational efficiencies.
CONS	<ul style="list-style-type: none">Significant long-term investmentShort term disruptions from swing space necessary to complete construction.

PRO	CON
Smallest Investment	No improvement to educational environment or portfolio
Addresses all facility needs	No change to educational environment, Largest Investment
Improved learning environment, modern classrooms, addresses capacity issues, Similar investment as Option A which only addresses basic facility needs	Only schools with greatest need gain new modern learning spaces and tools
Improves learning environment with modern classrooms and tools, address capacity issues, reduces portfolio size which improves operational efficiencies	Significant long term investment; short term disruptions due to construction

CHCCS OPTIONS DETAILS

	OPTION A COMFORTABLE AND SAFE	OPTION B COMFORTABLE AND SAFE, PLUS 10-YEAR FACILITY NEEDS	OPTION C COMFORTABLE AND SAFE, PLUS 10-YEAR FACILITY NEEDS
SCHOOL NAME	BUDGET	BUDGET	STRATEGY
CARRBORO ES	\$0.0 M	\$22.0 M	Replacement School
EPHESUS ES	\$8.5 M	\$28.2 M	High Priority Needs
ESTES HILLS ES	\$3.4 M	\$29.5 M	Replacement School
FRANK PORTER GRAHAM ES	\$5.4 M	\$30.9 M	Consolidate
GLENWOOD ES	\$1.0 M	\$16.3 M	High Priority Needs
MORRIS GROVE ES	\$4.5 M	\$24.6 M	High Priority Needs
NORTHSIDE ES	\$0.0 M	\$13.3 M	High Priority Needs
RASHKIS ES	\$6.4 M	\$29.7 M	High Priority Needs
SCROGGS ES	\$4.4 M	\$29.9 M	High Priority Needs
SEAWELL ES	\$0.5 M	\$23.1 M	High Priority Needs
MCDOUGLE ES	\$15.3 M	\$60.8 M	High Priority Needs
CARRBORO HS	\$9.2 M	\$67.1 M	High Priority Needs
CHAPEL HILL HS	\$10.9 M	\$29.6 M	High Priority Needs
E. CHAPEL HILL HS	\$23.2 M	\$75.6 M	High Priority Needs
PHOENIX ACADEMY	\$1.5 M	\$2.8 M	Renovation
MCDOUGLE MS	\$15.3 M	\$60.8 M	High Priority Needs
CULBRETH MS	\$8.9 M	\$44.6 M	Replacement School
PHILLIPS MS	\$3.6 M	\$29.0 M	High Priority Needs
SMITH MS	\$12.5 M	\$42.2 M	Adequacy (Learning Tools)
LINCOLN CENTER	\$5.2 M	\$15.0 M	-
NEW MIDDLE SCHOOL	-	-	-
TOTAL	\$139.7 M	\$675.1 M	

OPTION C PLUS UPGRADED LEARNING TOOLS		OPTION D COMFORTABLE AND SAFE, PLUS NEW CONSTRUCTION	
BUDGET	STRATEGY	BUDGET	
\$49.5 M	Replacement School	\$49.5 M	
\$8.5 M	Renovation	\$28.9 M	
\$49.5 M	Consolidate	\$1.3 M	
\$1.4 M	Consolidate	\$1.4 M	
\$1.0 M	Renovation	\$26.3 M	
\$4.5 M	Renovation	\$11.8 M	
\$0.0 M	Renovation	\$14.2 M	
\$6.4 M	Renovation	\$15.1 M	
\$4.4 M	Renovation	\$12.2 M	
\$0.5 M	Renovation	\$25.9 M	
\$15.3 M	Renovation	\$34.3 M	
\$37.7 M	High Priority Needs	\$37.7 M	
\$10.9 M	High Priority Needs	\$10.9 M	
\$23.2 M	Renovation	\$23.2 M	
\$5.7 M	Renovation	\$5.7 M	
\$15.3 M	Adequacy (Learning Tools)	\$17.9 M	
\$71.5 M	Replacement School	\$71.5 M	
\$3.6 M	Replacement School	\$71.5 M	
\$16.3 M	Adequacy (Learning Tools)	\$16.3 M	
-	-	-	
-	New School (Replacing capacity from McDougle ES/MS)	\$71.5 M	
\$325.2 M		\$546.9 M	

Comparing options to determine the best path forward for OCS



04

OCS OPTIONS

OPTION A – COMFORTABLE AND SAFE

5-YEAR INVESTMENT: \$80.1M @ \$16.0M/YEAR

OVERVIEW

Option A provides for high priority repairs and system replacements that address building systems that keep students and occupants warm, cool, safe, and dry.

TIMELINE

Option A addresses only near term facility requirements. This option should be executed over the next 5 years, which is approximately \$16 million per year.

PROS

- Smallest investment option
- Addresses 20 percent of facility needs

CONS

- No change to educational environment
- No adjustments to capacity
- No new or renovated schools
- Many facility needs not addressed

OPTION B – COMFORTABLE AND SAFE, PLUS 10-YEAR FACILITY NEEDS

10-YEAR INVESTMENT: \$421.7M @ \$42.2M/YEAR

OVERVIEW

Option B addresses all building needs identified in the facility condition assessment. This option brings the facility conditions to a like new state. However; there is no change to the educational spaces or adequacy of the schools.

TIMELINE

Option B addresses anticipated facility needs of the next ten years. This option should be executed over the next 10 years, which is approximately \$42.2 million per year.

PROS

- Addresses all facility needs

CONS

- No change to educational environment
- No adjustments to capacity
- No new or renovated schools
- Largest investment option

OCS OPTIONS SUMMARY

OPTION	INVESTMENT	TIMELINE	COST/YEAR
OPTION A	\$80.1 M	5 YEARS	\$16.0 M
OPTION B	\$421.7 M	10 YEARS	\$42.2 M
OPTION C	\$216.0 M	10 YEARS	\$21.6 M
OPTION D	\$463.9 M	15 YEARS	\$30.9 M

OPTION C – COMFORTABLE AND SAFE,
PLUS UPGRADED LEARNING TOOLS

10-YEAR INVESTMENT: \$216.0M @ \$21.6M/YEAR

OVERVIEW	Option C addresses the high priority facility needs and improves the educational learning environment through school renovations, replacements, and educational adequacy improvements.
TIMELINE	Option C addresses high priority facility needs, adequacy improvements, and school renovations and replacements. This option should be executed over 10 years at approximately \$21.6 million invested annually.
PROS	<ul style="list-style-type: none">Improves the learning environment by providing students and teachers modern classrooms and tools at the schools in the most needSchool replacements address capacity needs, by building facilities that meet the current and future enrollment projections, the district will improve operational efficiencies.New school alleviates over capacity at the elementary grade level. Additionally, the location is planned in the northwestern area of the district where growth is occurring and anticipated to continue.Mid-range cost option only slightly higher than Option A that addresses only the basic facility needs.
CONS	<ul style="list-style-type: none">Only the schools with the greatest need will gain new modern learning spaces and tools. Some older schools may reach the end of their useful life before the construction program is complete.

OPTION D – COMFORTABLE AND SAFE,
PLUS NEW CONSTRUCTION

15-YEAR INVESTMENT: \$463.9M @ \$30.9M/YEAR

OVERVIEW	Option D takes a strategic approach to addressing the districts portfolio needs through repairs, renovations, and replacements. Option D provides for a long-term plan that moves OCS out of its current portfolio and into facilities that meet current and future educational and programmatic needs of the district.
TIMELINE	Option D is a significant investment in the future of OCS. In order to complete this option, it is recommended to occur over 15 years with an annual investment of approximately \$30.9 million.
PROS	<ul style="list-style-type: none">Improves the learning environment by providing students and teachers with modern classrooms and toolsSchool replacements and renovations address over capacity at the middle and high school grade levels and improve the learning environment for the students of OCS. Replacement schools were identified based on their condition, educational adequacy, and utilization.New school alleviates over capacity at the elementary grade level. Additionally, the location is planned in the northwestern area of the district where growth is occurring and anticipated to continue.
CONS	<ul style="list-style-type: none">Significant long-term investmentShort term disruptions from swing space necessary to complete construction.

PRO	CON
Smallest Investment	No improvement to educational environment or portfolio
Addresses all facility needs	No change to educational environment, Largest Investment
Improved learning environment, modern classrooms, addresses capacity issues, Similar investment as Option A which only addresses basic facility needs	Only schools with greatest need gain new modern learning spaces and tools
Improves learning environment with modern classrooms and tools, address capacity issues, reduces portfolio size which improves operational efficiencies	Significant long term investment; short term disruptions due to construction

OCS OPTIONS DETAILS

	OPTION A COMFORTABLE AND SAFE	OPTION B COMFORTABLE AND SAFE, PLUS 10-YEAR FACILITY NEEDS	COMFORTABLE AND SAFE,
SCHOOL NAME	BUDGET	BUDGET	STRATEGY
CENTRAL ES (Partial Rebuild)	\$6.1 M	\$18.1 M	Replacement School
EFLAND-CHEEKS ES	\$1.3 M	\$16.6 M	High Priority Needs
GRADY BROWN ES	\$4.8 M	\$15.8 M	High Priority Needs
HILLSBOROUGH ES	\$2.8 M	\$21.3 M	Consolidate with Central ES
NEW HOPE ES	\$3.0 M	\$46.6 M	Adequacy (Learning Tools)
PATHWAYS ES	\$4.7 M	\$15.6 M	High Priority Needs
RIVER PARK ES	\$3.0 M	\$28.1 M	High Priority Needs
NEW ELEMENTARY SCHOOL	-	-	New Elementary School
CEDAR RIDGE HS	\$6.3 M	\$24.2 M	High Priority Needs
ORANGE HS	\$5.8 M	\$75.8 M	High Priority Needs
PARTNERSHIP ACADEMY	\$0.1 M	\$0.8 M	High Priority Needs
A.L. STANBACK MS	\$18.5 M	\$52.9 M	High Priority Needs
GRAVELLY HILL MS	\$13.9 M	\$33.1 M	Renovation
ORANGE MS	\$6.9 M	\$48.9 M	High Priority Needs
ADMINISTRATIVE ANNEX	-	\$1.8 M	-
ADMINISTRATIVE ANNEX II (TRANSP DISPATCH)	-	\$0.5 M	-
CENTRAL OFFICE	\$0.0 M	\$1.2 M	High Priority Needs
MAINTENANCE DEPARTMENT	\$0.4 M	\$2.5 M	High Priority Needs
TRANSPORTATION DEPARTMENT	\$1.7 M	\$7.9 M	High Priority Needs
WELCOME CENTER	\$0.7 M	\$10.2 M	High Priority Needs
TOTAL	\$80.1 M	\$421.7 M	

OPTION C PLUS UPGRADED LEARNING TOOLS		OPTION D COMFORTABLE AND SAFE, PLUS NEW CONSTRUCTION	
BUDGET		STRATEGY	BUDGET
\$49.5 M		Replacement School	\$34.5 M
\$1.3 M		Adequacy (Learning Tools)	\$3.4 M
\$4.8 M		High Priority Needs	\$4.8 M
\$1.3 M		Consolidate with Central ES	\$1.3 M
\$13.0 M		Adequacy (Learning Tools)	\$13.0 M
\$4.7 M		High Priority Needs	\$4.7 M
\$3.0 M		High Priority Needs	\$6.7 M
\$49.5 M		New School	\$49.5 M
\$6.3 M		High Priority Needs	\$6.3 M
\$5.8 M		Replacement School	\$153.9 M
\$0.1 M		Replacement School	\$9.4 M
\$18.5 M		Renovation	\$54.0 M
\$48.5 M		Renovation	\$48.5 M
\$6.9 M		Replacement School	\$71.5 M
-		-	-
-		-	-
\$0.0 M		-	-
\$0.4 M		-	-
\$1.7 M		High Priority Needs	\$1.7 M
\$0.7 M		High Priority Needs	\$0.7 M
\$216.0 M			\$463.9 M

The best recommendation to strategically invest in facilities to improve the teaching and learning environment at CHCCS and OCS.



05

RECOMMENDATION

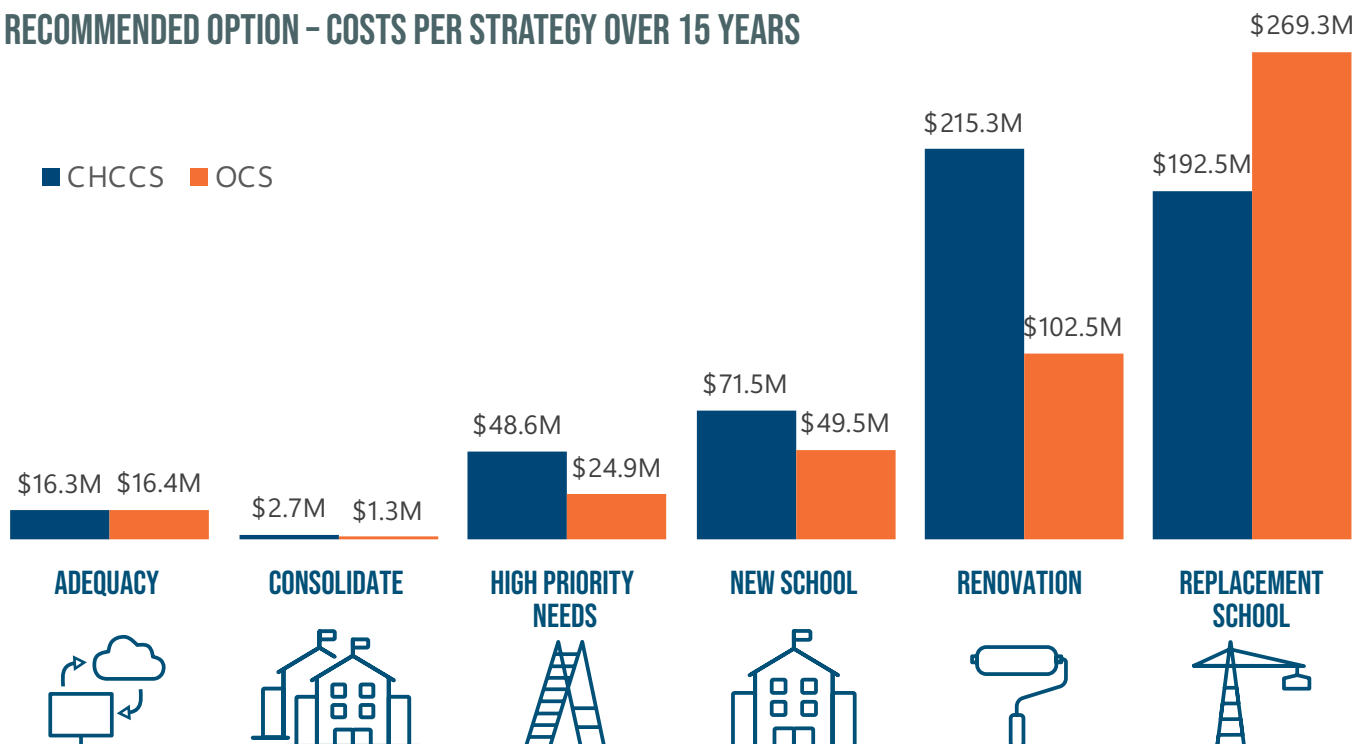
Woolpert recommends Orange County consider Option D as a path forward to strategically invest in school facilities and improve the learning environment. The recommendation considers the facility condition, educational adequacy, utilization, enrollment projections, industry best practices, and goals of each district. The recommendation provides CHCCS and OCS with a fiscally responsible plan that sustains the districts' facilities for the long-term and improves the teaching and learning environment.

The recommendation calls for \$1 billion investment over 15 years. The 15-year time frame is driven by the large investment and number of projects that need to be completed. It is suggested that the plan be achieved through three construction phases prioritized by District leadership and designed to minimize student disruption and costs during construction.

BENEFITS

- Enhanced teaching and learning environments advance educational outcomes and opportunities
- Improved school utilization provides students the flexible spaces necessary for multiple learning styles
- Updated classroom spaces and learning tools to meet today's education standards
- Right-sized portfolio creates operational efficiencies
- Investing in the community attracts and retains residents by providing competitive schools

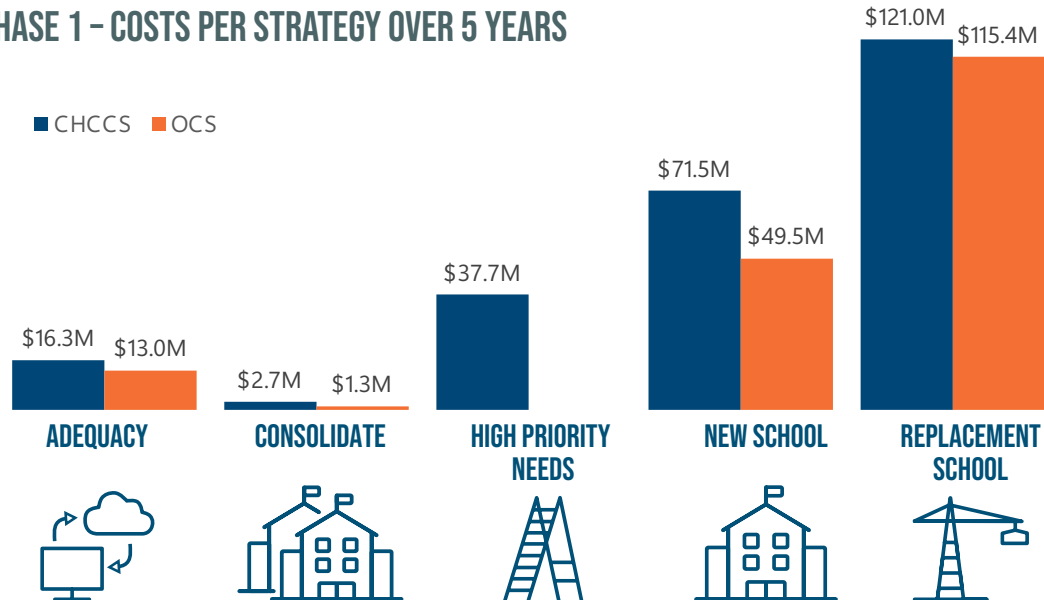
RECOMMENDED OPTION – COSTS PER STRATEGY OVER 15 YEARS



PHASE 1 (YEARS 1-5)

Phase 1 addresses the capacity needs of both districts and the facilities in the poorest condition. Phase 1 builds the only new capacity school recommended in the plan. Phase 1 plans for the construction of a new elementary school for OCS to accommodate West-side growth along with priority replacement schools for OCS. Phase 1 also includes replacement schools in the worst condition for CHCCS and closing Frank Porter Graham Elementary school which will be used as swing space during construction.

PHASE 1 – COSTS PER STRATEGY OVER 5 YEARS



CHAPEL HILL-CARRBORO CITY SCHOOLS

Facility	Strategy	Budget
Carrboro ES	Replacement School	\$49.5M
New MS	New School	\$71.5M
Estes Hills ES	Consolidate	\$1.3M
Frank Porter Graham ES	Consolidate	\$1.4M
Carrboro High	High Priority Needs	\$37.7M
Culbreth MS	Replacement School	\$71.5M
Smith MS	Adequacy	\$16.3M
Total		\$249.2M

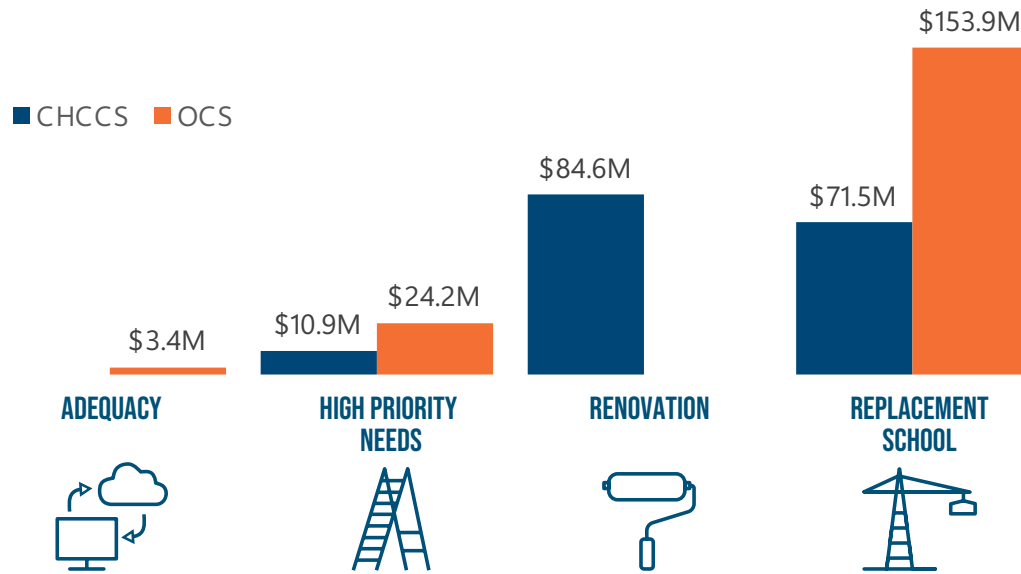
ORANGE COUNTY SCHOOLS

Facility	Strategy	Budget
Central ES (Partial Rebuild)	Replacement School	\$34.5M
New ES	New School	\$49.5M
Hillsborough ES	Consolidate	\$1.3M
Orange MS	Replacement School	\$71.5M
New Hope ES	Adequacy	\$13.0M
Partnership Academy	Replacement School	\$9.4M
Total		\$179.2M

PHASE 2 (YEARS 6-10)

Phase 2 focuses on improving educational adequacy and condition of schools in years five through ten of the plan. School renovations include updating space sizes to meet modern educational standards.

PHASE 2 – COSTS PER STRATEGY OVER 5 YEARS



CHAPEL HILL-CARRBORO CITY SCHOOLS

Facility	Strategy	Budget
Phoenix Academy	Renovation	\$5.7M
Chapel Hill High	High Priority Needs	\$10.9M
Ephesus ES	Renovation	\$28.9M
Morris Grove ES	Renovation	\$11.8M
Rashkis ES	Renovation	\$15.1M
E. Chapel Hill HS	Renovation	\$23.2M
Phillips MS	Replacement School	\$71.5M
Total		\$167.0M

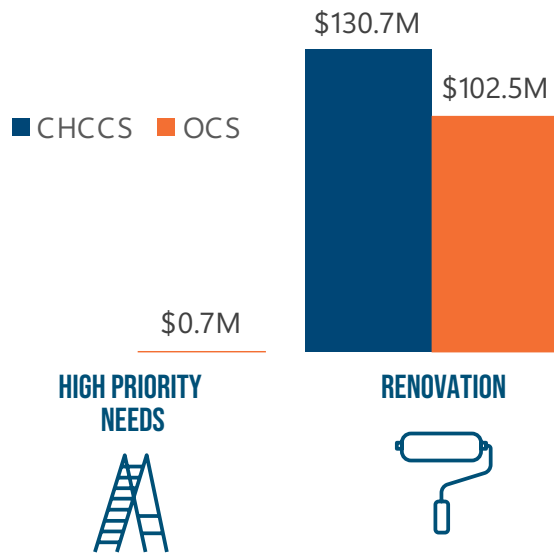
ORANGE COUNTY SCHOOLS

Facility	Strategy	Budget
Efland-Cheeks ES	Adequacy	\$3.4M
Grady Brown ES	High Priority Needs	\$4.8M
Pathways ES	High Priority Needs	\$4.7M
River Park ES	High Priority Needs	\$6.7M
Cedar Ridge HS	High Priority Needs	\$6.3M
Maintenance Department	High Priority Needs	\$0.0M
Orange HS	Replacement School	\$153.9M
Transportation Department	High Priority Needs	\$1.7M
Total		\$181.5M

PHASE 3 (YEARS 11-15)

Phase 3 focuses on completing the renovations and replacement schools in years 10 through 15, as well as some high priority facility needs at administrative facilities. The renovations and replacement schools will update classrooms to modern standards.

PHASE 3 – COSTS PER STRATEGY OVER 5 YEARS



CHAPEL HILL-CARRBORO CITY SCHOOLS

Facility	Strategy	Budget
McDougle ES-MS	Renovation	\$52.1M
Glenwood ES	Renovation	\$26.3M
Northside ES	Renovation	\$14.2M
Scroggs ES	Renovation	\$12.2M
Seawell ES	Renovation	\$25.9M
	Total	\$130.7M

ORANGE COUNTY SCHOOLS

Facility	Strategy	Budget
Welcome Center	High Priority Needs	\$0.7M
A.L. Stanback MS	Renovation	\$54.0M
Gravelly Hill MS	Renovation	\$48.5M
	Total	\$103.2M

RECOMMENDED PHASES

		FACILITY	STRATEGY	BUDGET	2025	2026	2027	2028
PHASE 1	CHCCS	Carrboro ES	Replacement School	\$49.5M	\$9.9M	\$19.8M	\$19.8M	
		New MS	New School	\$71.5M	\$14.3M	\$28.6M	\$28.6M	
		Estes Hills ES	Consolidate	\$1.3M			\$1.3M	
		Frank Porter Graham ES	Consolidate	\$1.4M			\$1.4M	
		Carrboro HS	High Priority Needs	\$37.7M			\$7.5M	\$15.1M
		Culbreth MS	Replacement School	\$71.5M			\$14.3M	\$28.6M
		Smith MS	Adequacy	\$16.3M				\$16.3M
	OCS	Central ES (Partial Rebuild)	Replacement School	\$34.5M	\$17.3M	\$17.3M		
		New ES	New School	\$49.5M	\$9.9M	\$19.8M	\$19.8M	
		Hillsborough ES	Consolidate	\$1.3M		\$1.3M		
		Orange MS	Replacement School	\$71.5M			\$7.2M	\$35.8M
		New Hope ES	Adequacy	\$13.0M				
		Partnership Academy	Replacement School	\$9.4M				
	TOTAL			\$428.4M	\$51.3M	\$86.8M	\$99.9M	\$95.7M
PHASE 2	CHCCS	Phoenix Academy	Renovation	\$5.7M				
		Chapel Hill HS	High Priority Needs	\$10.9M				
		Ephesus ES	Renovation	\$28.9M				
		Morris Grove ES	Renovation	\$11.8M				
		Rashkis ES	Renovation	\$15.1M				
		E. Chapel Hill HS	Renovation	\$23.2M				
		Phillips MS	Replacement School	\$71.5M				
	OCS	Efland-Cheeks ES	Adequacy	\$3.4M				
		Grady Brown ES	High Priority Needs	\$4.8M				
		Pathways ES	High Priority Needs	\$4.7M				
		River Park ES	High Priority Needs	\$6.7M				
		Cedar Ridge HS	High Priority Needs	\$6.3M				
		Maintenance Department	High Priority Needs	\$0.0M				
		Orange HS	Replacement School	\$153.9M			\$7.7M	
		Transportation Department	High Priority Needs	\$1.7M				
	TOTAL			\$348.5M			\$7.7M	
PHASE 3	CHCCS	McDougle ES-MS	Renovation	\$52.1M				
		Glenwood ES	Renovation	\$26.3M				
		Northside ES	Renovation	\$14.2M				
		Scroggs ES	Renovation	\$12.2M				
		Seawell ES	Renovation	\$25.9M				
	OCS	Welcome Center	High Priority Needs	\$0.7M				
		A.L. Stanback MS	Renovation	\$54.0M				
		Gravelly Hill MS	Renovation	\$48.5M				
	TOTAL			\$233.9M				
GRAND TOTAL			\$1,010.8M	\$51.3M	\$86.8M	\$107.6M	\$95.7M	

2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039
\$15.1M										
\$28.6M										
\$28.6M										
\$13.0M										
\$9.4M										
\$94.7M										

	\$5.7M									
		\$10.9M								
		\$14.4M	\$14.4M							
			\$11.8M							
				\$15.1M						
					\$23.2M					
			\$14.3M	\$28.6M	\$28.6M					
	\$3.4M									
	\$4.8M									
	\$4.7M									
	\$6.7M									
	\$6.3M									
	\$0.0M									
		\$23.1M	\$61.6M	\$61.6M						
					\$1.7M					
	\$31.6M	\$48.4M	\$102.1M	\$105.2M	\$53.5M					

						\$52.1M				
							\$26.3M			
								\$14.2M		
								\$12.2M		
									\$25.9M	
					\$0.7M					
					\$10.8M	\$21.6M	\$21.6M			
								\$9.7M	\$19.4M	\$19.4M
					\$11.5M	\$73.7M	\$47.9M	\$36.1M	\$45.3M	\$19.4M
\$94.7M	\$31.6M	\$48.4M	\$102.1M	\$105.2M	\$65.0M	\$73.7M	\$47.9M	\$36.1M	\$45.3M	\$19.4M

Orange County should focus investment in the building systems that keep students and teachers comfortable, safe and dry.



06

ONGOING CAPITAL RENEWALS

Ongoing capital renewals are building system or component renovations and replacements based on expected useful life estimated during the facility condition assessment. Planning for ongoing capital renewals is essential to properly operate school facilities to support the educational missions of CHCCS and OCS. Building professionals within the industry generally use current replacement value (CRV) of their portfolios as a basis for budgeting. It is generally accepted that two percent of CRV should be spent annually to support ongoing capital renewals.¹

Our experience and industry studies find that historically, spending on school facilities is well below the amount necessary to adequately maintain the portfolio.¹ Orange County is responsible for facilities with a CRV of approximately \$1.74 billion. Based on a two percent CRV, Orange County should be investing approximately \$34.9 million in the maintenance of CHHCS and OCS facilities.

For planning purposes, Orange County should focus investment in the building systems that keep students and teachers comfortable, safe and dry.

- For facilities planned for major renovations or replacement in the next five years, the recommendation discussed in the previous section includes only Priority 1, safety-related components.
- For facilities planned for major renovations or replacement in five-ten years, the recommendation includes Priority 1–3 components to make certain the facilities remained functional until that time. The analysis anticipates an average annual expenditure of \$27.5 million annually for ongoing capital renewals (Table 6-1).

Table 6-1: Summary of Ongoing Capital Renewal Needs

	TOTAL BUDGET	AVG ANNUAL EXPENDITURE	2025	2026	2027	2028	2029	2030
CHCCS	\$270.2M	\$18.0M	\$80.2M	\$0.6M	\$3.6M	\$21.1M	\$27.5M	\$14.0M
OCS	\$142.3M	\$9.5M	\$42.6M	\$0.0M	\$2.6M	\$25.2M	\$1.3M	\$3.0M
ORANGE COUNTY	\$412.4M	\$27.5M	\$122.8M	\$0.6M	\$6.3M	\$46.3M	\$28.8M	\$17.0M

1. Filardo, Mary. 2021 State of Our Schools: America's PK–12 Public School Facilities 2021. Washington, D.C.: 21st Century School Fund.

The Facility Condition Assessment data was loaded into Brightly’s Predictor software to analyze various funding scenarios. Brightly’s Predictor accurately predicts and compares how various funding scenarios could impact facilities in the future. The following scenarios were evaluated.

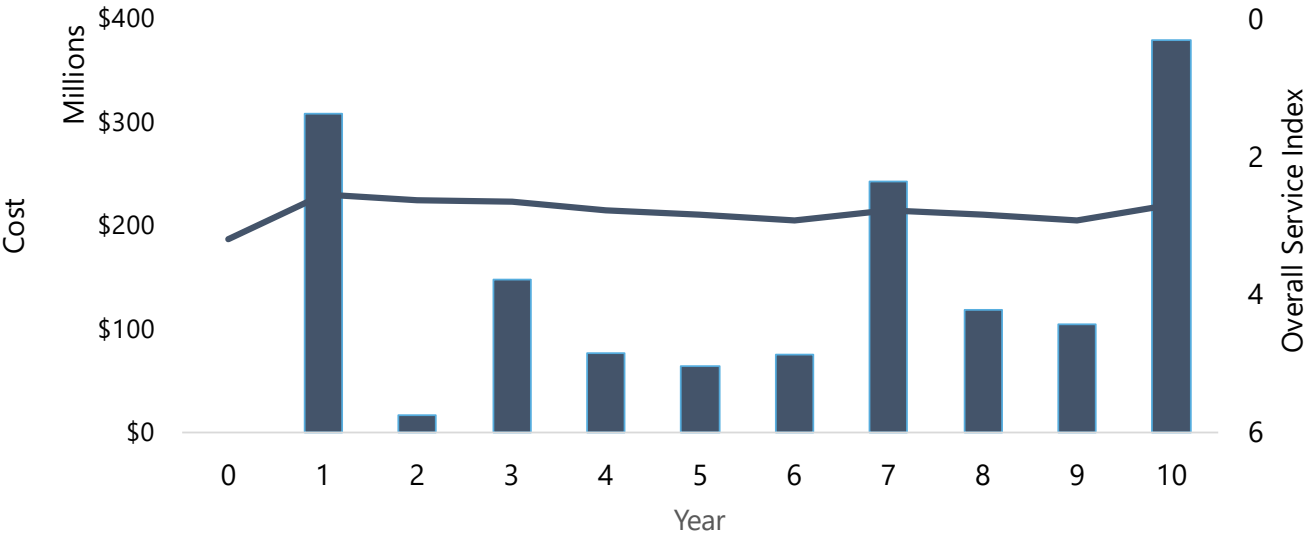
- Unconstrained budget
- \$34.9 million per year budget (2%CRV)
- \$27.5 million per year budget (prioritized ongoing capital renewals)

Brightly evaluates the condition of a portfolio using an Overall Service Index (OSI). The OSI rates the condition from 0 (like new) to 6 (end of life). The reports produced by Brightly’s Predictor software provide an estimate of how the condition (OSI) of the portfolio will change based the value of facility investment each year.

UNCONSTRAINED BUDGET

Figure 6-2 simulates if all facility improvements necessary were completed every year. Yearly spending averages approximately \$122 million per year for ten years and maintains an approximately 2.7 OSI, indicating that the overall condition of the facility portfolio would improve from its current state and on average the facility components would have more than 50% of their useful life remaining.

Figure 6-2: OSI Prediction if All Facility Improvements were Completed Every Year



2030	2031	2032	2033	2034	2035	2036	2037	2038	2039
\$0.0M	\$31.5M	\$19.7M	\$3.7M	\$6.5M	\$0.0M	\$32.0M	\$0.0M	\$0.1M	\$29.7M
\$0.7M	\$13.7M	\$9.9M	\$7.7M	\$3.5M	\$0.0M	\$31.7M	\$0.0M	\$0.0M	\$0.3M
\$0.7M	\$45.2M	\$29.5M	\$11.4M	\$10.0M	\$0.0M	\$63.8M	\$0.0M	\$0.1M	\$30.1M

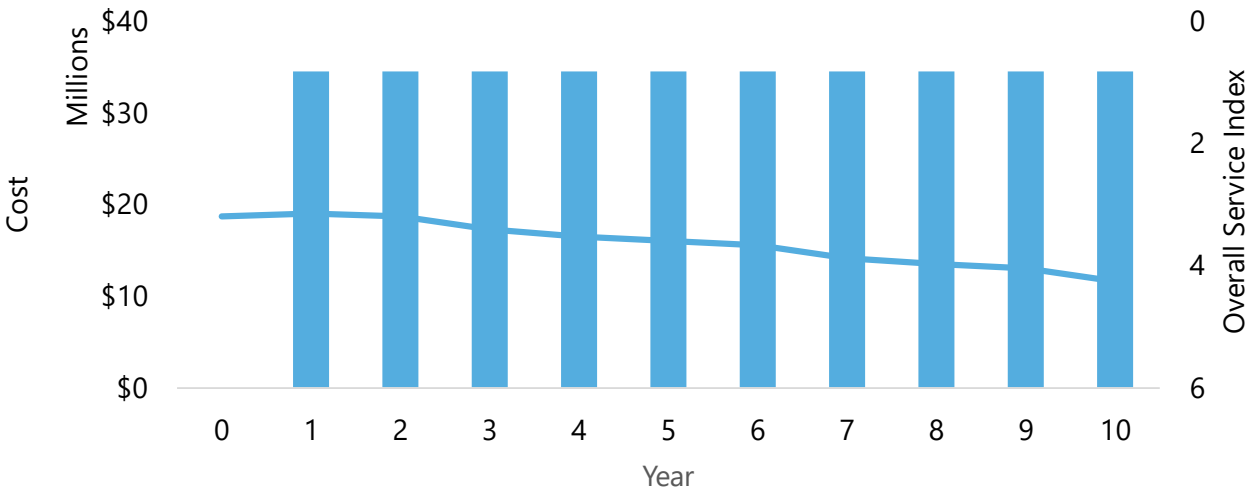
Figure 6-1: Overall Service Index Ratings

OSI		REMAINING LIFE
0	➡	100%
1	➡	83%
2	➡	67%
3	➡	50%
4	➡	33%
5	➡	17%
6	➡	0%

\$34.9 MILLION PER YEAR BUDGET (2% CRV)

Industry best practices suggest districts should spend 2 percent of the CRV on periodic renewals annually, for Orange County this means investing \$34.9 million annually on periodic renewals. Figure 6-3 shows the OSI degrading from a 3.21 to a 4.27 over the next ten years. This indicates that a funding level of \$34.9 million over ten years decreases the condition of the building systems, resulting in an average remaining useful life of building systems and components less than 30 percent

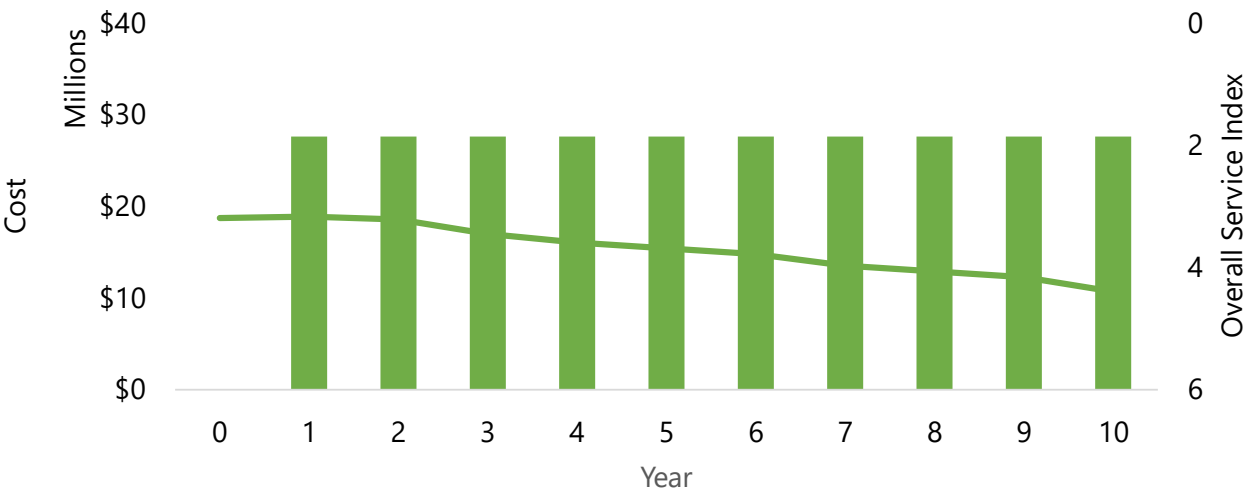
Figure 6-3: OSI Prediction Following Orange County’s Capital Improvement Plan



\$27.5 MILLION PER YEAR BUDGET (PRIORITIZED ONGOING CAPITAL RENEWALS)

Based on the facility condition assessment and recommended long-range facilities optimization plan, Orange County should anticipate an average annual expenditure of \$27.5 million annually for ongoing capital renewals. Figure 6-4 shows the OSI degrading from a 3.21 to a 4.41 over the next ten years at this investment level. This indicates that a funding level of \$27.5 million over ten years decreases the condition of the building systems, resulting in an average remaining useful life of building systems and components less than 30 percent.

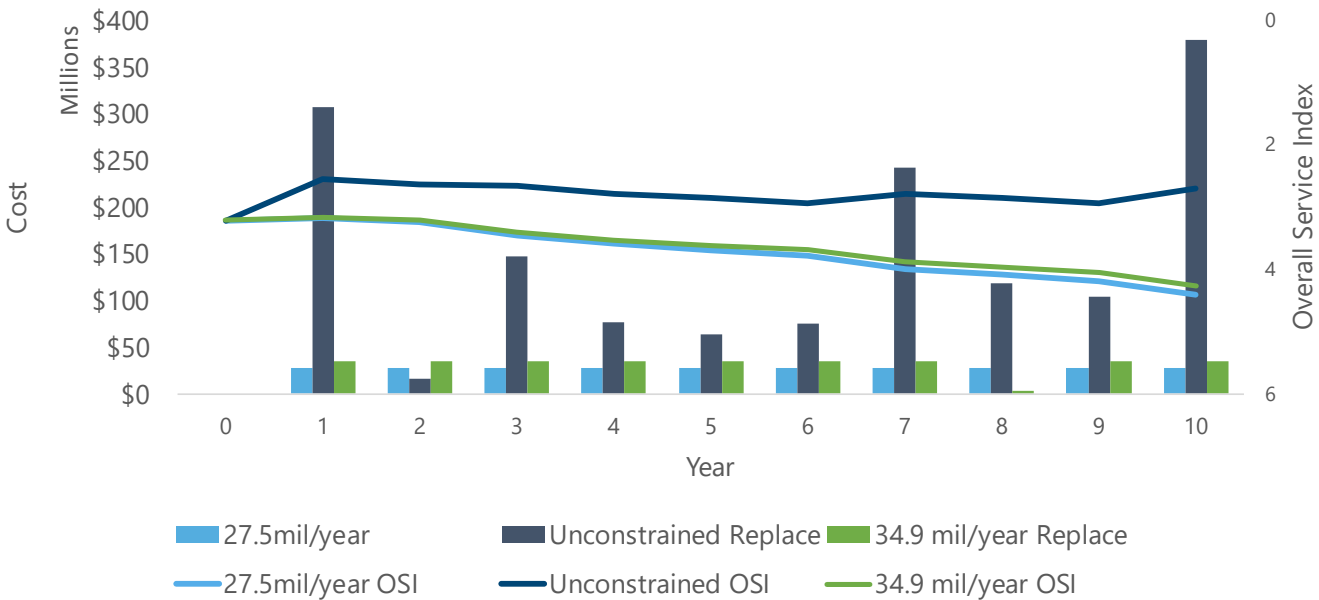
Figure 6-4: OSI Prediction if \$40M is Spent in on Facility Improvements Every Year



FUNDING SCENARIO SUMMARY

Figure 6-5 compares the three funding scenarios and the impact to the condition of the school facilities. The unconstrained budget is unrealistic; however, it maintains a service level of approximately 2.8, indicating on average building systems have more than 50 percent of their useful life remaining. A budget of \$27.5 million and \$34.9 million per year over the next ten years will degrade the overall condition of the facilities, resulting in an OSI of 4.41 and 4.27, respectively. At either funding levels, the County can expect building systems across the portfolio will have less than 30 percent of their remaining useful life, on average. In addition, with an annual investment of \$27.5 million or \$34.5 million, the trend in condition beyond 10 years will continue downwards and the overall condition of the portfolio will continue to degrade.

Figure 6-5: Comparison of the Three Funding Scenarios



Failing to address projected ongoing capital renewals will continue to increase the deferred maintenance backlog. Planning for some amount of ongoing deferred maintenance is common, as most institutions cannot afford all the capital renewals that would ideally be accommodated every year. However, as deferred maintenance backlogs grow, facilities reach the point where major facility renovation or replacement becomes a better long-term investment strategy than ongoing capital renewals and deferred maintenance. Orange County’s educational facilities will continue to require significant and strategic investments for the foreseeable future to support the education of students in CHCCS and OCS.

Table 6-2 on the following page provides details of the ongoing capital renewals needed per facility at CHCCS and OCS.

Table 6-2: Ongoing Capital Renewal Needs per Facility

	FACILITY	BUDGET	2025	2026	2027	2028	2029
CHCCS	Carrboro ES	\$0.0M					
	Carrboro HS	\$16.3M					
	Chapel Hill HS	\$53.7M					
	Culbreth MS (Priority 1 Needs)	\$0.0M					
	East Chapel Hill HS	\$51.6M					
	Ephesus ES	\$7.7M					
	Estes Hill ES (Priority 1 Needs)	\$0.4M					
	Frank Porter Graham ES (Priority 1 Needs)	\$0.9M					
	Glenwood ES	\$10.5M					
	Lincoln Center	\$8.7M					
	McDougle ES-MS	\$31.6M					
	Morris Grove ES	\$8.7M					
	Northside ES	\$6.5M					
	Phillips MS	\$6.2M					
	Phoenix Academy	\$2.0M					
	Rashkis ES	\$19.5M					
	Scroggs ES	\$24.6M					
	Seawell ES	\$11.3M					
	Smith MS	\$10.1M					
	CHCCS TOTAL	\$270.2M	\$80.2M	\$0.6M	\$3.6M	\$21.1M	\$27.5M
OCS	A.L. Stanback MS 304	\$31.1M					
	Administrative Annex	\$0.8M					
	Administrative Annex II (Transp Dispatch)	\$0.1M					
	Cedar Ridge HS 310	\$1.2M					
	Central ES 312	\$2.9M					
	Central Office	\$0.3M					
	Efland Cheeks ES 324	\$7.5M					
	Grady A. Brown ES 328	\$14.5M					
	Gravelly Hill MS 327	\$25.0M					
	Hillsborough ES 329 (Priority 1 Needs)	\$0.4M					
	Maintenance Department	\$0.9M					
	New Hope ES 330	\$5.2M					
	Orange HS 332	\$18.1M					
	Orange MS 316	\$0.0M					
	Partnership Academy (Priority 1 Needs)	\$0.2M					
	Pathways ES 336	\$12.2M					
	River Park ES 308	\$13.9M					
	Transportation Department	\$3.3M					
	Welcome Center	\$4.7M					
	OCS TOTAL	\$142.3M	\$42.6M	\$0.0M	\$2.6M	\$25.2M	\$1.3M
	ORANGE COUNTY TOTAL	\$412.4M	\$122.8M	\$0.6M	\$6.3M	\$46.3M	\$28.8M

[illegible]

Strategically investing available funds will improve the condition of school facilities in Orange County's 39 campuses



07

CONCLUSION



This Long-Range Facilities Optimization Plan provides Orange County, CHCCS, and OCS the information necessary to make informed decisions for future investment in school facilities. Because school facilities have a direct impact on student learning, student and staff health, and community vitality, it is crucial to properly invest in the learning environment.

The Woolpert recommendation calls for \$1 billion investment over the next 15 years in school facilities. This recommendation considers the facility condition, educational adequacy, utilization, and enrollment projections, industry best practices, and goals of the districts to determine a path forward for both CHCCS and OCS. The goal of the recommendation is to strategically invest in facilities to improve the teaching and learning environment, while being fiscally responsible.

The Facility Condition Assessment identified over a dozen facilities that have reached the point where major renovations or replacement is a better long-term investment than attempting to catch up with deferred maintenance. In addition, even if deferred maintenance was not a challenge for these schools, the Educational Adequacy Assessment identified that continuing to invest in inadequate facilities would keep students constrained in undersized facilities or

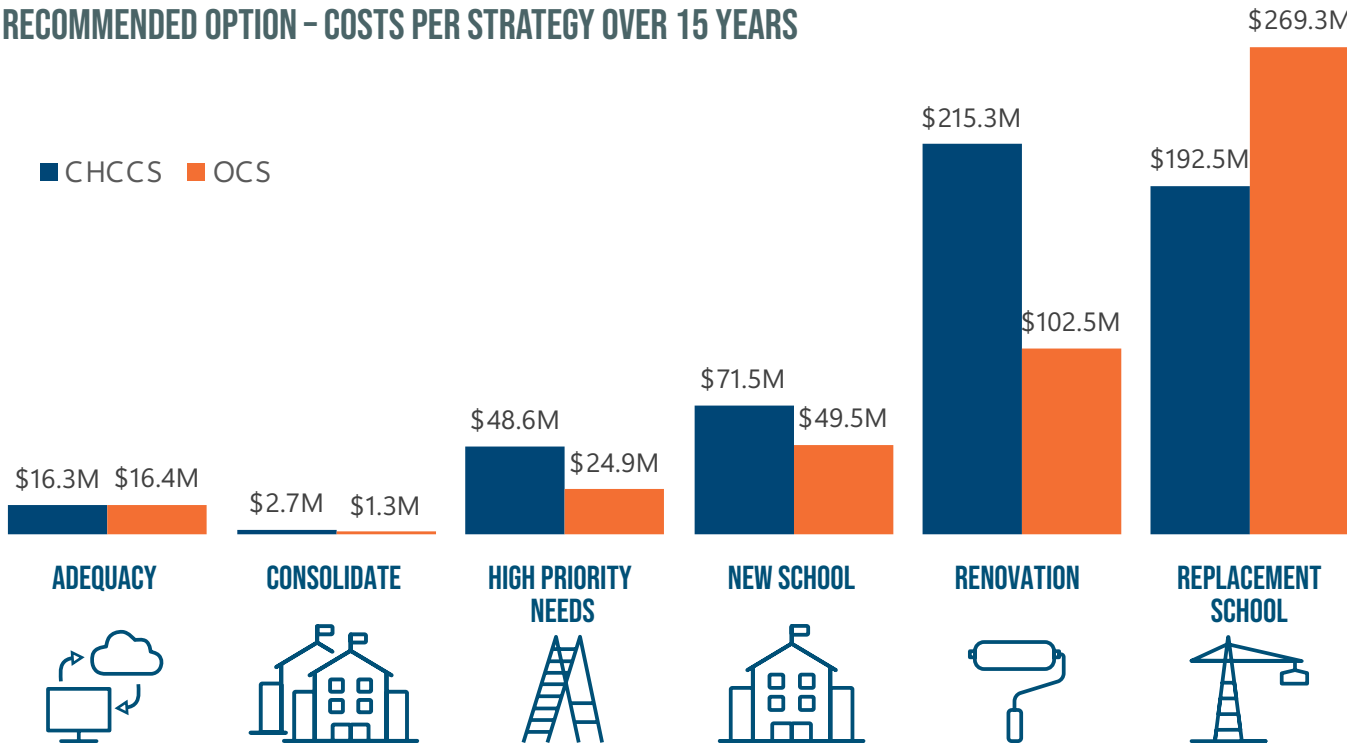
in learning environments that do not have the equipment to support a comprehensive education.

Industry standard modeling and the Woolpert Facility Condition Assessment both suggest the County should plan on investing significantly more in ongoing facility needs than they have historically. While funding the recommendation may not be immediately achievable, it should be considered as the guide for the future of CHCCS and OCS facilities. The Woolpert recommendation assumes that funding facility improvements will continue. It is recommended that the plan be revisited and updated every five years to make certain the planned projects are in line with enrollment projections, condition, and district mission.

Leveraging the recommendation, Orange County, CHCCS, and OCS have the opportunity to engage the community going forward to fund the renovation and new construction projects that will enhance the teaching and learning environments for all students of Orange County. Through commitment and collaboration between County and District leadership, the state of the current school facilities can be addressed to promote safe, supportive, and modern learning environments for all students.

School facilities have a direct impact on student learning, student and staff health, and community vitality.

RECOMMENDED OPTION – COSTS PER STRATEGY OVER 15 YEARS





WOOLPERT

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