

# YORK COUNTY, SOUTH CAROLINA ADEQUATE SCHOOL FACILITIES ORDINANCE

## Assessment and Policy Recommendations

Committee Review Draft  
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## Overview

York County is in the process of evaluating the adoption of an adequate school facilities ordinance (ASFO) to address the adequacy of public school facilities throughout the County. In the process of establishing the ASFO, the County must establish clear standards for measuring adequacy and consider the addition of those standards to the Comprehensive Plan.

The requirement for adequate school facilities is a key element of effective growth management. An ASFO ensures that necessary public facilities and services to support new development are available and adequate, based on adopted level of service (LOS) standards, at the time that the impacts of new development occur. An ASFO generally is a local government exercise of regulatory authority, whether or not that unit of government is the facility or service provider. It is intended to:

- (1) Link the provision of key public facilities and services with the type, amount, location, density, rate and timing of new development.
- (2) Properly manage new growth and development so that it does not outpace the ability of service providers to accommodate the development at established level of service standards.
- (3) Coordinate public facility and service capacity with the demands created by new development.
- (4) Discourage sprawl and leapfrog development patterns and to promote more efficient development consistent with the Comprehensive Plan.
- (5) Ensure that the provision of public facilities and services to new development does not cause an unacceptable reduction in the levels of service provided to existing residents.
- (6) Guarantee that new residents receive all necessary public facilities and services.

This report summarizes the consultant's findings and recommendations based on a review of existing studies. The purposes of this Report are to:

- Establish the context in which the ASFO is being considered;
- Summarize the elements of an ASFO;
- Summarize recent growth trends and projections;
- Recommend public school facility impact areas;
- Recommend appropriate level of service standards;
- Assess the existing capital improvement program for school facilities to ensure that it is adequate to meet the requirements for inclusion in the ASFO;
- Identify comprehensive plan amendments needed to support the ASFO; and
- Recommend policy decisions that should be made prior to completion of the ASFO.

## Context for the ASFO

York County is located at the southern edge of the Charlotte metropolitan area. As metropolitan growth has radiated out from Charlotte, York County has experienced increased development, particularly along its northern edge and the I-77 corridor, which are located closest to employment in Charlotte and Mecklenburg County. This growth, which has been predominantly single family residential uses serving young families, has strained the County's ability to build and fund construction of new school facilities demanded by new residents. Recent tax law changes are likely to increase pressure on schools in York County as Charlotte area residents find that property tax savings in South Carolina allow them to buy more home.

## Historical Growth Trends

Between 1980 and 2005, the County's population increased by 72 percent, from 106,720 to 183,762 residents. The County's growth is mainly attributable to its proximity to Charlotte. As shown in the population map (see **Appendix A** for all maps), most of the County's growth has been concentrated in the northern portion of the County and along the I-77 corridor due these areas' proximity to Charlotte.

## Growth Projections

**Table 1** shows the State's population estimates and projections through the year 2030, with average annual population increases fluctuating above 3,000 new residents per year. **Table 2** compares State and County growth projections, showing that the County's Comprehensive Plan projects significantly more growth than State demographers anticipate. **Table 3**, which compares the rate of building permit issuance, certificate of occupancy issuance and enrollment trends, shows that the number of building permits issued throughout the County and enrollment have been steadily increasing for the last five years.

**Table 1: Projected County Population Growth**

Year	Population	Population Increase	Average Annual Increase
2000	164,614		
2010	198,730	34,116	3,412
2020	229,470	30,740	3,074
2030	261,330	31,860	3,186

Source: Office of Research & Statistics, South Carolina State Budget & Control Board

**Table 2: State and County Population Projections**

Year	Population	
	State Projections <sup>1</sup>	County Projections <sup>2</sup>
2015	214,100	232,021
2025	244,830	278,698

<sup>1</sup>Source: Office of Research & Statistics, South Carolina State Budget & Control Board

<sup>2</sup>Source: York County Comprehensive Plan

**Table 3: Building Permits, Certificates of Occupancy & Enrollment Growth**

Year	Building Permits	Certificates of Occupancy	Enrollment Growth	Enrollment Growth/CO
2002	2,733	2,425	782	0.322
2003	2,785	2,763	857	0.310
2004	2,798	3,392	945	0.279
2005	3,081	3,198	1,064	0.333
2006	3,328	3,582	1,446	0.404

Sources: Building permit data provided by HUD State of the Cities Data Base  
 Certificates of occupancy data provided by York County Planning Enrollment  
 growth consolidated from school district data

### Enrollment Trends

The term “membership,” or “average daily membership,” as used throughout this report for public schools refers to the average number of students per day on the public school rosters during the first 135 days of school.

Membership, as shown in **Table 4**, has been steady in each school district, with the exception of slight declines and then growth in the smallest district in the County, York #1. The rate of growth across the districts has increased over the past 5 years, with a 4.3% total gain experienced in the 2006/07 school year. While Rock Hill District #3 is the largest in the County, Clover District #2 and Fort Mill #4 are growing at the highest rate, with Fort Mill topping an incredible 10% growth in 2006/07.

Maps in **Appendix A** show the boundaries of each school district in the County. Boundaries of the districts are set and are not impacted by annexations or other changes in municipal boundaries. The attendance zones for individual elementary, middle/junior and high schools are shown in separate maps for each district.

**Table 4: York County K-12 Average Daily Membership (135-day ADM)**

	YORK #1		CLOVER #2		ROCK HILL #3		FORT MILL #4		COUNTY TOTAL		
	ADM	% CHG	ADM	%CHG	ADM	%CHG	ADM	%CHG	ADM	CHG	%CHG
2001/02	4,967		4,600		14,984		5,506		<b>30,057</b>		
2002/03	4,948	-0.4%	4,808	4.5%	15,221	1.6%	5,862	6.5%	<b>30,839</b>	<b>782</b>	<b>2.6%</b>
2003/04	4,928	-0.4%	5,009	4.2%	15,539	2.1%	6,220	6.1%	<b>31,696</b>	<b>857</b>	<b>2.8%</b>
2004/05	4,900	-0.6%	5,115	2.1%	15,954	2.7%	6,672	7.3%	<b>32,641</b>	<b>945</b>	<b>3.0%</b>
2005/06	4,974	1.5%	5,359	4.8%	16,253	1.9%	7,119	6.7%	<b>33,705</b>	<b>1,064</b>	<b>3.3%</b>
2006/07	4,977	0.1%	5,655	5.5%	16,658	2.5%	7,861	10.4%	<b>35,151</b>	<b>1,446</b>	<b>4.3%</b>

### Pipeline Development

When evaluating the availability of utility and school capacity, the County must consider demands from previously approved development projects that would not be subject to future ASFO tests, referred to as pipeline development. Depending on the rate of absorption, there currently is a four to six year supply of single family lots in the pipeline. **Table 5** summarizes existing parcel records supplied by the County and based on tax assessor data. The table shows the number of parcels that are zoned for residential uses (in areas with zoning), are between 4,000 sq. ft. and 2 acres in

size, are vacant with no improvements, and are not designated as common areas, open spaces or utilities. The maps in **Appendix A** show the aggregated pipeline lots for each elementary school attendance zone by district. While this information may include some unplatted parcels or exclude some larger platted lots, it provides a good estimate of the number of vacant single-family residential lots existing in each school district. It is envisioned that school adequacy would be tested at the site plan phase of development, therefore no multi-family development is shown as having committed capacity.

**Table 5: Vacant Parcels by School District**

School District	Pipeline Lots
York	2,381
Clover	3,040
Rock Hill	7,095
Fort Mill	3,509
<b>Total</b>	<b>16,025</b>

Source: York County GIS, August 24, 2007

**Policy Issue 1: How much of the pipeline development should be shown as committed capacity?**

**Recommendation: The amount of the pipeline shown as committed capacity should be consistent with the amount of time between approval of a project and creation of demands, as well as the amount of time for which the County assumes that facilities shown in the school facility capital improvement plans are available. In initial discussions, the Committee has been using two years.**

## Comprehensive Plan

York County's Comprehensive Plan anticipates significant growth throughout the County and seeks to direct that growth to locations where public facilities are adequate. To help accomplish this, the Plan establishes an Urban Service Boundary in which most development is anticipated to occur. Specific policies related to the need for the County to establish requirements ensuring the adequacy of school facilities include:

### Land Use Element

**LU-1.4 Develop and apply appropriate measures to ensure that new development does not overburden roads, schools and other public facilities and services.**

- Within one year from plan adoption, study the feasibility of establishing regulatory tools to address the **timing of development** to ensure that growth occurs concurrent with adequate capacity of public facilities and services, to include but not be limited to a **York County Adequate Public Facilities Ordinance**.

**LU-3.3 Prioritize the completion of infrastructure and other capital improvements within existing urban areas, designated urban boundaries and in areas targeted for redevelopment and infill.**

### Community Facilities Element

**CF-1.1 Establish an ongoing Countywide facility planning system to identify and prioritize needs and locations for community facilities and services.**

- Work with the municipalities in the County to define and adopt an Urban Services Area within one year of Plan adoption (refer to Land Use Element).

- Within one year of Plan adoption, study the feasibility of establishing appropriate measures to allocate the costs to expand public facilities and services to serve new development in a fair and equitable manner, including, but not limited to:
  - Adequate Public Facilities Ordinance
  - Impact Fees
  - Land dedication requirements for schools, parks and other public facilities, including provisions for "fee in lieu" payments.

#### **GOAL CF-11**

**Ensure that adequate land is reserved throughout the County to allow for school expansions or new schools, consistent with projected needs and the pattern of future land uses.**

##### **CF-11.1 Work cooperatively with the schools districts to identify appropriate sites for new schools.**

- Within one year of Plan adoption, develop criteria pertaining to school siting that might be implemented in addition to the State's requirements for educational facilities, to ensure consistency with the Comprehensive Plan. Work with the school districts to define the criteria for selecting and acquiring acceptable future schools sites. Such criteria may include but are not limited to: site size; location; adequacy of existing and projected infrastructure; access/circulation, land use/ zoning, compatibility with present and projected uses of adjacent property; and presence of environmental, historic, or archaeological constraints.
- Consider making school facilities subject to review as a special exception or to other appropriate County development approval process.
- Establish mechanisms to inform the school districts of the phasing of new development to more accurately anticipate the timing and locational needs of future facilities. This will be achieved by regularly providing information about new developments as they move through the rezoning or development review process.
- As the opportunity arises, and in coordination with the school districts, evaluate the ability to co-locate existing or planned school sites with other public facilities, including but no limited to: emergency shelters, bike and pedestrian pathways, libraries, parks, and community and recreational centers and facilities.

##### **CF-11.3 Explore the feasibility of adopting an Adequate Public Facilities Ordinance (APFO) for York County, linking residential growth and school capacities**

##### **CF-11.4 Consider adopting a program for the dedication of land from larger developments to the school district for development as possible future schools**

#### **Implementation Schedule**

- Consider adopting a program for the dedication of land from larger developments to the school district for development as possible future schools. (CF-1.1, CF1.2, & CF-11.4)
- Adopt an Adequate Public Facilities Ordinance [APFO] for York County, linking residential growth and school capacities (CF-1.1 & CF-11.3)
- Plan for community facilities such as libraries, schools, and parks by setting aside land within the Urban Services Area. (CF-10.1), (CF-11.1) & (CF-14.3)

## ***Elements of an Adequate School Facilities Ordinance***

An ASFO establishes requirements for the coordination of development decisions with the availability of adequate school facilities. The ordinance typically includes the following elements:

- Findings relating to the need for the ordinance;
- Identification of the types of development subject to the ASFO requirements;
- Listing of the facilities to be included within the ASFO;
- Designation of the area(s) subject to the ordinance requirements;
- Establishment of minimum levels of services for applicable facilities;
- Designation of the point or points in the development process at which ASFO tests are established;
- Identification of alternative responses to a finding that facilities are not adequate (e.g., denial of development applications, phasing of development, mitigation of deficiencies, etc); and
- Definition of ASFO administration requirements, including the monitoring of capacities and demands.

## ***Initial Determination of Suitability of Facilities***

Not all public facilities are appropriate for inclusion in the APFO. The following factors have been considered when evaluating the suitability of school facilities for inclusion in an APFO.

- **The necessity of maintaining facility adequacy to residents and businesses** – This factor considers whether the lack of capacity will pose a threat to the health, safety and welfare of the community. When considering this factor, the authors of this report have considered whether the lack of the adequate capacity in the facility should preclude new development. Clearly, school facilities are critical to the quality of life and welfare of the county's residents.
- **The existence of a capital improvements program (CIP) to provide needed capacity** – This factor considers whether there is a plan in place to provide some capacity for future development. Inherent in an ASFO is the assumption that there is a public commitment to provide some capacity to serve future growth and development. School district capital improvement programs (CIPs) are the primary evidence of this commitment. These CIPs include sufficient investment to resolve existing deficiencies and provide adequate capacity for new development within the next five years.
- **The ability to establish measurable minimum levels of service** – This factor is necessary to provide a means of measuring whether facilities are adequate or not. The minimum level of service must be measurable to enable the County to determine whether adequacy has been achieved. Classroom sizes provide a basis for determining the maximum level of service that may be accommodated by existing schools, this capacity may be adjusted based on operational practices (e.g., year-round classes or double sessions) and programs (e.g., special programs that may increase or decrease the number of students per classroom or the proportion of the day that classrooms are used).
- **The extent of control the County has over demands for the facility** – The County and its cities have direct authority over land use and development matters. While not controlling the number of students per household, local governments do manage the number of households that may generate demands for school facilities. For school capacity to be considered development regulations, the County and cities would need to develop a coordinated system for allocating school capacity in each affected district.

- **The extent of control the County has over facility capacity** – Schools are operated by the Clover, Fort Mill, Rock Hill and York school boards. Local governments do not need to have direct responsibility for providing capacity, but when that responsibility rests with another jurisdiction, local governments should establish agreements the applicable district to establish a schedule for provision of needed capacity.

## Adequate School Facility Ordinance Issues

### Overview

As discussed above, each of the school districts in York County may be included in a local ASFO. However, York County, its cities and the school districts must resolve several key decisions prior to implementing the ASFO, including:

- (1) The designation of facility impact areas within which the ASFO will apply;
- (2) The establishment of level of service (LOS) standards;
- (3) The timing and sequencing of public facilities and availability of service;
- (4) The types of development to which the ASFO will apply;
- (5) The point in the development approval process when adequacy will be determined;
- (6) The effect of failure to meet one or more adequacy standards; and
- (7) Procedures for allocating and monitoring facility capacity.

### Facility Impact Areas

Public facility impact areas are used to measure the availability of capacity for proposed development. As shown in **Table 6**, there are many ways to determine the areas of impact for school service.

**Table 6: Potential Public Facility Impact Areas**

Impact Area	Strengths	Weaknesses
District-wide	<ul style="list-style-type: none"> <li>• Easy to measure capacity</li> <li>• Provides flexibility to shift demands to locations where surplus capacity exists</li> </ul>	<ul style="list-style-type: none"> <li>• Does not always provide realistic assessment of capacity – elementary students are not likely to be bused across larger districts</li> </ul>
High School Attendance Zones and Feeder Schools	<ul style="list-style-type: none"> <li>• Easy to measure capacity</li> <li>• Provides flexibility to shift students between elementary and middle schools within a high school attendance zone</li> </ul>	<ul style="list-style-type: none"> <li>• Does not address capacity availability between high school zones</li> <li>• May result in significant transportation challenges within the high school attendance zone to reapportion elementary and middle school students.</li> <li>• Does not work if lower schools feed more than one high school</li> </ul>
Attendance Zones at Each Level	<ul style="list-style-type: none"> <li>• Provides most detailed assessment of capacity availability for each development application</li> </ul>	<ul style="list-style-type: none"> <li>• Greater complexity in mitigation determinations</li> <li>• May be perceived as less equitable for property owners, particularly those near attendance zone boundaries</li> </ul>

### **Policy Issue 2: What service areas should be used to assess school capacity?**

**Recommendation: Measure capacity for each school level based on the attendance zone in which the proposed development is located. To make this system more flexible, allow the use of excess within an abutting attendance zone that has available capacity. Methodology may vary slightly for each school district.**

**Level of Service (LOS) Standards**

Level of service standards are essential elements of ASFOs because they provide a measure of adequacy that can be used to evaluate each new development. School capacity is measured by a variety of factors listed in **Table 7**. Each of these measures serves a separate function. Collectively, these factors have been used to establish the capacity of each school facility for each school district in York County

**Table 7: Level of Service Standard Criteria, by School Facility**

Potential LOS Factors	Function
Rated capacity: students per permanent classroom ratios	Rated capacity is measured based on the maximum capacity that may be accommodated in permanent classrooms under normal usage. This measure may be adjusted somewhat to reflect operational changes, such as the number of periods per day that each classroom is used (e.g., utilization factor) or programmatic changes, such as the relatively smaller class sizes for special programs (e.g., remedial education and advanced classes)
Temporary maximum capacity: capacity of permanent classrooms plus capacity provided by portables and other converted spaces	Temporary maximum capacity is the capacity that a site may accommodate based on the use of temporary classrooms in portables, cafeterias and other spaces that are not permanent classrooms. This capacity typically is used only as a buffer during construction of new facilities.
Potential capacity: capacity of core facilities	Class size adjustments can reduce the capacity of existing classrooms. However, if core facilities (e.g., cafeterias and libraries) are designed for higher occupancy, they could provide additional capacity within a school if additional permanent classrooms are added.

**Policy Issue 3: Should portable buildings be considered as part of the rated capacity?**

**Recommendation: No. While portable buildings may provide temporary capacity to accommodate overflows of students that cannot be accommodated in permanent classrooms. By allowing the use of portable buildings as part of rated capacity, the County would allow new development to mitigate capacity deficiencies by providing portable classrooms.**

**Policy Issue 4: How should school facility capacity be determined?**

**Recommendation: Each school board should provide annual updates on the number of permanent classrooms and the capacity provided by those classrooms after considering operational and programmatic adjustments.**

**School Facility Capacity Analysis**

York County's four school districts provide primary and secondary education throughout the County. The districts are independent.

School capacity is measured in terms of the number of students that may be accommodated under normal operations, typically based on the number of students per classroom. Schools typically have the ability to accommodate more students than the rated capacity (through the use of temporary buildings or other building spaces). It generally is not cost effective to operate schools much below capacity. Consequently, due to high fixed operating costs (e.g., administrative staff, building heating and cooling, and other O&M costs), most jurisdictions open schools near capacity and allow capacities to exceed rated capacity by 5 to 20 percent on a temporary basis while new permanent facilities are being constructed.

**Table 8** shows the existing level of service standards for average classroom sizes, as well as the maximum classroom size. Average classroom sizes represent the adopted level of service, which is multiplied by the number of permanent classrooms in each school to calculate the rated capacities.

**Table 8: Maximum Classroom Sizes**

Grade Spans	Class-size Average			
	Clover	Fort Mill	Rock Hill	York
Pre-K	20	21	20	20
K	25	21	20	25
1-3	20	21	20	21
4-5	20	25	20	21
6	20	25	27	21
7-8	25	25	27	21
9-12	25	25	27	21

**Table 9** shows the total permanent classroom capacity of each school in each of the districts. This level of service does not include any capacity provided by temporary buildings within the rated capacity. Note that this table presents the 135-day ADM, but includes pre-K students in addition to the K-12 students as presented in **Table 4**, therefore the summation of all students in Table 9 will exceed total daily membership as shown in **Table 4**. Pre-K programs vary across the districts, with the Clover District providing the highest level of pre-K service, offering full-day pre-school to 240 children at its elementary schools in the 2006/07 school year.

Maximum capacities in **Table 9** show the number of portable classrooms that exist at each of the school facilities. All of the districts rely to some extent on portable classrooms, though the York and Rock Hill Districts do so most heavily. The Clover District has portable classrooms at Bethel Elementary and Clover High. At Bethel, the portable is used part-time as a science lab, and is not used for permanent classroom capacity. As of the first day of the 2007/08 school year, the two portables at Clover High were used for storage and contained no classroom functions. For each of the districts, it is envisioned that portable classrooms will be necessary to accommodate students

on a temporary basis, but these classrooms should not be included in the assessment of permanent facility capacity.

**Table 9: Existing Permanent School Capacities, Portables and 2006-2007 Demands**

School	Grade Levels	Permanent Classroom Capacity	Portable Classrooms	PK-12 Enrollment 2006-2007
<b>York School District</b>				
Cotton Belt	PK-5	695	6	733
Hickory Grove/Sharon	PK-6	580		425
Hunter Street	PK-5	920	4	823
Jefferson	PK-5	675	5	593
Harold C. Johnson Middle	6-7	755	2	731
York Junior	8-9	765	4	830
York Comprehensive High	10-12	1030	2	1,062
<b>Clover School District</b>				
Bethany Elementary	PK-4	440		291
Bethel Elementary	PK-4	470	1	475
Crowders Creek Elementary/Middle	PK-4/5-6	1267		1,110
Griggs Elementary	PK-4	682		489
Kinard Elementary	PK-4	544		430
Clover Middle	5-6	654		469
Clover Junior	7-8	1,042/1,451		896
Clover High	9-12	2,034/2,680	2	1,735
<b>Rock Hill School District</b>				
Belleview Elementary	K-5	572		590
Ebenezer Elementary	K-5	360	1	366
Ebinport Elementary	K-5	560		529
Finley Road Elementary	K-5	548		522
Independence Elementary	K-5	560		513
Lesslie Elementary	K-5	552	2	526
Mt. Gallant Elementary	K-5	572	3	621
Northside Elementary	K-5	444	5	499
Oakdale Elementary	K-5	572	3	636
Old Pointe Elementary	K-5	500	2	687
Richmond Dr. Elementary	K-5	552	2	604
Rosewood Elementary	K-5	624	2	726
Sunset Park Elementary	K-5	524		304
Sylvia Circle Elementary	K-5	420		282
York Rd. Elementary	K-5	552	1	536
Castle Heights Middle	6-8	900		908
Rawlinson Rd. Middle	6-8	900	4	1,075
Saluda Trail Middle	6-8	900	1	884
W.C. Sullivan Middle	6-8	900		1,069
South Pointe High	9-12	1800		1,036
Northwestern High	9-12	1900		1,824

School	Grade Levels	Permanent Classroom Capacity	Portable Classrooms	PK-12 Enrollment 2006-2007
Rock Hill High	9-12	1900		2,053
<b>Fort Mill School District</b>				
Fort Mill Elementary	K-5	900	2	761
Gold Hill Elementary	K-5	900		839
Orchard Park Elementary	K-5	900	2	840
Riverview Elementary	K-5	900	4	566
Springfield Elementary	K-5	900	4	718
Fort Mill Middle	6-8	900		609
Gold Hill Middle	6-8	900		617
Springfield Middle	6-8	900		643
Fort Mill High	9-12	1800		2,270

Sources: School Districts.

### Student Generation Rates

School standards are expressed in terms of students rather than dwelling units. Therefore, a conversion factor must again be applied so that proposed residential developments of varying dwelling unit types can be consistently and uniformly evaluated against the LOS standard. However, for schools, the critical determinant is not just the people per household, but the student generation rate (SGR) per dwelling, by type, based on localized County data. Further, the SGR must be calculated for elementary school students, middle school students and high school students. The County will need to establish and refine student generation rates over time to address different student generation rates by household type and location.

### Student Projection Methodology

A discussion of the projections methods used by the State Department of Education and the four York County School Districts follows. **Table 10** at the end of this section shows the projected annual enrollment for each of the four districts through 2011/12.

The South Carolina Department of Education creates membership projections for each school district, which are calculated using average daily membership in conjunction with the cohort-survival method, for all grades except for kindergarten, which is calculated separately based on live births. The cohort-survival method is based on projected first-grade membership and a matrix of grade-to-grade survival ratios. A survival ratio is the quotient obtained by dividing the membership of one grade for a school year into the membership of the next higher grade a year later. The survival ratios are different for each school district and for each grade level. According to the Department of Education's 2005 Membership Projections, the survival ratios for a given grade level and district tend to remain relatively constant from year to year, but can change dramatically due to population growth or decline in the overall community. A survival ratio less than 1.0 indicates the net effects of students moving out of the district, deaths, nonpromotions, dropouts, and transfers to private schools. A survival ratio greater than 1.0 indicates the net effects of students moving into the district, promotions, and transfers from private schools. The last year that the Department of Education published projections was 2005, using data from the 2004/04 school year. Since those projections are out-dated, they are not presented here, other than as a discussion of cohort-survival methodology.

It should be noted for all of the Districts' projections, that should a major shift in population trends occur, due to an event such as the opening or closing of a major employer, or the opening of land to development due to a major infrastructure investment, such as new sewer

lines or transportation routes, the population projections could change significantly. The County and Districts should monitor and adjust any projections and facilities plans accordingly.

### **York District #1**

The Long-Range School Facilities Study for York School District One, dated September 2006 serves as the basis for this discussion. A standard cohort-survival method was employed by the York School District to project student enrollment in grades 1 through 12, as described above. Kindergarten enrollment was computed using a percentage growth factor to the live birth figure for 2004, the last year for which data were available at the time of the study. A growth factor of 2.5% was chosen to compute the annual live birth figure as part of running the Cohort Survival Ratio calculations.

The study indicates that student enrollments will grow noticeably in the District during the coming ten years (2006-2015/16), with most of the growth will at the elementary level. At the elementary level (K-5) the population will grow by approximately 575 students, a 25% increase. At the middle school level (6-8), the student enrollment will increase by about 90 students, a 7.5% growth. However, at the high school level (9-12) roughly 60 fewer students will be served, representing a 4% decrease in enrollment. However, because the elementary grade level enrollments will be increasing, the District can expect significant increases at the middle and high school grades shortly beyond the ten year projection period (both the middle grades and high school enrollments are expected to grow from about 2010 through 2020 if trends hold).

The District used two other factors to project enrollment; one based on population trends, and the other on residential housing starts. While both also indicated positive growth, the projections based on housing starts suggested more conservative growth than the other two methods, which projected similar growth. For purposes of facilities planning, the report recommends using a projection of a PK-12 enrollment in 2015/2016 of 5,880 students (includes approximately 300 PK). Projections are not provided in the report for each year of the projection period, and this Analysis includes only K-12 enrollment. Therefore, for **Table 10**, annual growth is represented by subtracting the projected pre-K enrollment and dividing the remaining growth equally over the projection period.

### **Clover District #2**

The Clover District uses the cohort survival method modified by historical data to project enrollment. If growth in a particular grade is more than the cohort survival calculation, the future estimates are adjusted to account for that effect. Over the past few years, the District has noted that its actual growth rate has exceeded the projections, reflecting higher levels of in-migration and expanding the need for new facilities.

### **Rock Hill District #3**

The projections calculated by the OR/Ed. Laboratory, Institute for Transportation Research and Education at North Carolina State University serve as the basis for this discussion. Incorporating historical school enrollment figures and available newborn data for the school district, the Lab performs cohort survival calculations to forecast system level enrollment. The District uses the Integrated Planning for School and Community (IPSAC) system, supplemented by a comprehensive Land Use Study of the geographic area encompassing the school district. The objective of the Land Use Study is to quantify future growth by school attendances. The Land Use Study includes two components: community interviews and Geographic Information Systems (GIS) data analysis.

The Rock Hill District is expected to grow by up to 3% annually over the next five years, for total growth of over 2,000 students. With many of its facilities already nearing capacity, many more of its schools are projected to exceed capacity over the next 5 years.

#### Fort Mill District #4

The Fort Mill School District 4 Ten-Year Facility Needs Study, dated 2006, serves as the basis for this discussion. The report indicates that, as one of the fastest growing districts in the State, the population of the Fort Mill District will more than double during the 10-year horizon of the study, growing to almost 17,000 students by the 2016/17 school year. The total current capacity of the District, including the newly opened Nation Ford High, is 10,500. The report notes that without any further construction, the District will reach maximum capacity by the 2009/10 school year. Many of the schools in the District are very near to capacity, and the District has resorted to an enrollment freeze at Gold Hill and Orchard Park Elementary Schools for the 2007/08 school years to prevent overcrowding.

The methodology used by the Fort Mill District to project enrollment is as follows (based on enrollment starting at the beginning of the 2006/07 school year):

1. The starting enrollment figure for the future school year was the end of year enrollment number for the previous school year.
2. The predicted student increase for each of the five school years projected was calculated by:
  - a. New home sales were calculated by determining the annual average total of new residential building permits issued within the school district for the period January 1, 2003 to June 30, 2006. The annual average of new home sales for this period was 878 ( $3,073 \div 3.5$ ).

This annual average total of residential building permits was multiplied by the school district's average person per household figure (2.62) to get an estimated population increase. From this estimated total population, the number that was representative of school age children was calculated by using the percentage such children represented of the 2000 population. That was 13.2% (elementary school), 4.5% (middle school) and 5.6% (high school) respectively.
  - b. Existing home sales were calculated by taking the actual number of such sales (2,455) between January 1, 2003 and June 30, 2006 and multiplying it by 40%. This percentage was determined to be the number that represented new students entering the school district from the sale of existing homes. The percentage was ascertained by looking at the growth of school age children (5-18 years) between 1990 and 2000 and then subtracting the students who would have entered the district as the result of the sale of new homes from the overall total.

The annual average of existing home sales between January 1, 2003 and June 30, 2006 was 281 ( $2,455 \times 40\% \div 3.5$ ). The number of new students these sales represented was calculated using the method described in paragraph a.
  - c. The estimated number of new students for both new and existing home sales is then added to the Starting Enrollment figure to get a Final Projected Enrollment for the 2006/07 school year of 7,995 or a 9.7% increase.
  - d. The Final Projected Enrollment number becomes the Starting Enrollment figure for each subsequent school year and is then multiplied by 9.7% to get the Final Projected Enrollment number for that school year. The Final

Projected Enrollment number represents the end of year enrollment for each school year.

**Table 10: Projected Enrollment (2007-2012)**

	York	Clover	Rock Hill	Fort Mill	Total	%Increase
2007-08	4,977	5,995	17,583	8,622	37,177	
2008-09	5,044	6,278	18,047	9,280	38,649	4.0%
2009-10	5,111	6,535	18,523	10,060	40,229	4.1%
2010-11	5,178	6,746	19,042	10,797	41,763	3.8%
2011-12	5,245	6,938	19,604	11,593	43,380	3.9%

### The Timing and Sequencing of School Facilities

The School Districts' Capital Improvements Programs (CIPs) project future facility needs based on anticipated growth. The CIPs identify facility improvements needed to accommodate projected growth and resolve existing deficiencies (see **Table 11**). Due to differences among the Districts regarding the status and timing of funding, all identified future facilities are included here, regardless of funding status. It is recognized that schools are funded through a variety of mechanisms, including voter-approved bond issues that cannot be guaranteed. Existing and planned facilities for each district are shown in **Appendix A**.

#### York School District #1

The York School District has identified Option #3 from their Long-Range School Facilities Study as their preferred model for accommodating growth. The District would utilize a PK-4, 5-6, 7-8, 9-12 grade structure, with the exception of Hickory Grove-Sharon Elementary, which would serve grades PK-6. The focus for the District is on preventing schools from becoming overly large. The 10-year plan includes converting HC Johnson Middle School to a PK-4 elementary school to help relieve overcrowding at the elementary level, and to limit size to a maximum of about 600 elementary students at any given school. The junior high would become a grades 5-6 center, while the high school would become a middle school for grades 7-8. Ninth grade would be housed at a new 9-12 high school in the District. The District proposed a bond issue in Spring 2007 for \$85 million to build the new high school and technology center and make renovations to its existing schools. Changes to capacity and capital costs of this plan are identified in **Table 13**. Total new capacity is 1,555, plus 200 core capacity at the new high school and technology center.

#### Clover School District #2

Clover School District plans to open two new schools at the beginning of the 2009 school year at a combined cost of \$54 to \$56 million. Total new capacity will be 1,650.

#### Rock Hill School District #3

Rock Hill School District identifies six new schools to be built, one which has just become operational for the 2007/08 school year, but is identified as a planned improvement since comparable 2007/08 135-day average daily membership figures are not yet available. Two schools are planned for the 2008/09 school year, with the remaining schools planned through 2014. At the end of that planning period, total new capacity is planned to be 5,400.

#### Fort Mill School District #4

As the fastest growing district in the County, the Fort Mill District opened Nation Ford High School for the 2007/08 school year, increasing their capacity by 1,500, and has eight additional new schools planned within the next ten years, increasing their capacity by 8,100 at an estimated cost of \$279 million.

**Table 11: Planned Improvements Summary**

School	Grade Levels	Year	Permanent Classroom Capacity	Capital Costs (\$ Million)
<b>York School District</b>				
HC Johnson Middle (New Elementary) Renovations	PK-4	2010	-145	\$8.6
Hunter Street Elementary, Hickory Grove-Sharon Elementary & York Junior High Renovations	5-6	2010	30	\$ .9
York 1 Academy Renovations (Alternative Center)		2010	-	\$1
York Comp. High & Technology Ctr. Renovations	7-8	2010	-130	\$8.3
New Floyd D Johnson Technology Center	9-12	2010	-	\$14.6
New High School	9-12	2010	1,800 (core areas 2,000)	\$63
<b>Clover School District</b>				
New Elementary	PK-4	2009	1,050	\$36
New Middle	5-6	2009	600	\$18-20
<b>Fort Mill School District</b>				
Nation Ford High	9-12	2007	1,500	
New Elementary #6	PK-5	2009	900	\$25
New Elementary #7	PK-5	2009	900	\$27
New Elementary #8	PK-5	2011	900	\$28
New Elementary #9	PK-5	2013	900	\$30
New Elementary #10	PK-5	2016	900	\$33
New Middle School #4	6-8	2010	900	\$31
New Middle School #5	6-8	2014	900	\$34
New High School #3	9-12	2011	1,800	\$71
<b>Rock Hill School District</b>				
India Hook Elementary		2007	600	\$12
Mt. Holly Elementary		2008	600	\$12
Dutchman Creek Middle		2008	900	\$28
New Middle School		2010	900	
New High School		2012	1800	
New Elementary School		2014	600	

***Policy Issue 5: What facilities should be considered when assessing the adequacy of public school facilities?***

***Recommendation: Consider all existing facilities at their rated capacities plus all facilities that are scheduled to be opened within two years of the approval of the sketch plan application.***

### ***Types of Development to Which the ASFO Will Apply***

An ASFO for public school facilities should be limited to residential development because non-residential development does not generate the demand for additional school capacity. The question that the County and municipalities must face is whether to exclude any certain types of residential development from the ASFO assessment? For instance, are there developments that will have such a minimal impact (de minimis) that they should not be subject to the test?

***Policy Issue 6: Should local governments establish a de minimis threshold that would not be subject to the school ASFO?***

***Recommendation: Family subdivisions should be exempt from the ASFO, but monitored.***

## Determining Adequacy

Local governments use a variety of points in the development review process to determine the adequacy of public facilities to serve proposed development. These approaches are summarized in Table 12.

**Table 12: Alternatives for ASFO Determination**

Development Application	Value in ASFO Determination	Limitations
Plan Amendment	Most discretionary stage of development process	Gives poor estimate of the number of units and no clear indication of the timeframe for the demand.
Zoning Map Amendment	Highly discretionary stage of development. Planned development process offers early opportunity to assess demands	Gives poor estimate of the number of units and no clear indication of the timeframe for the demand.
Sketch plan	Good indicator of number of single family and duplex units anticipated and more proximate to the time of demand	Typically leaves 2 years between approval and generation of demand
Site Development Plan	Good indicator of number of multi-family units anticipated and more proximate to the time of demand	Typically leaves only a year between approval and the generation of demand

### **Policy Issue 7: When should adequacy be determined?**

**Recommendation: Adequacy should be determined at the following points in the development process:**

- **Initial action on applications for all Planned Developments.**
- **Sketch plan action for single family and duplex lots.**
- **Site plan approval for multi-family projects.**

**Early assessment of capacity without a commitment of capacity is appropriate. Early commitment of capacity would give competitive advantage to one developer over another. Early commitment of capacity should only occur when a developer commits to mitigate school capacity deficiencies through a development agreement.**

### **Policy Issue 8: When should mitigation take place?**

**Recommendation: Mitigation should take place in accordance with a development agreement at the following points in the development process:**

- **In accordance with the terms of a development agreement addressing a multi-phase development project, but not later than either of the following provisions for conventional development.**

- **Final plat action for single family and duplex lots.**
- **Site plan approval for multi-family projects.**

### **The Effect of Failure to Meet One or More Adequacy Standards.**

The ASFO should establish alternatives for development that does not pass the adequacy test for public school capacity. These alternatives may include any combination of the following:

- Withdrawal of the application;
- Agreement to phase development in conjunction with the availability of adequate capacity;
- Limitations on school age residents (e.g., senior projects);
- Contribution of land;
- Contribution of facilities;
- Contribution of money; and/or
- Other proposals to reduce demand or increase capacity to satisfy adequacy tests.

An ASFO does not abrogate the basic legal tenet that all residents of York County are entitled to attend public schools in the County. The ASFO, however, is imposed *before* persons become residents of the County. The County, pursuant to its subdivision, planning and zoning authorities, has a responsibility to ensure that development does not take place prematurely (*i.e.*, before public facilities are available to accommodate facility and service demands generated by a proposed development) or in a way that would cause existing public facilities to become inadequate based on adopted LOS standards. If either occurs, the effective result is that the current LOS will decline and all *existing* residents will suffer.

### **Policy Issue 9: Who should determine whether mitigation is adequate**

**Recommendation: The School Districts are in the best position to determine whether the mitigation measure will resolve capacity deficiencies, but the agreement should include appeals provisions to protect applicant's and the County from arbitrary action by a District.**

### **Procedures for Allocating and Monitoring Facility Capacity**

The ASFO must establish procedures for allocating and monitoring facility capacity. In general, these procedures will require the County and the School Board to share information on development activities, school capacity and enrollment. This may be done on a quarterly, semi-annual or annual basis. In addition, the ASFO should establish a technical review entity comprised of representatives from the County and School Board to review and recommend responses to individual development applications. The determination of capacity should follow the following procedures:

1. Determine available capacity based on the rated capacity of the schools, considering the capacity available within the existing and adjacent attendance zones for elementary, middle and high schools
2. Subtract existing enrollment in applicable attendance zones from the capacity calculated in #1 to calculate existing capacity,
3. Subtract projected demand from approved, yet undeveloped lots from the existing capacity calculated in #2 to determine available capacity
4. Subtract demand projected to be generated by the proposed development from the available capacity calculated in #3 to determine whether projected demands exceed rated or maximum capacity

The County should allow mitigation if the demand exceeds rated capacity, but does not exceed maximum capacity of the schools based on existing and committed demands.

Rated capacity = the number of students that may be accommodated in permanent classrooms in accordance with adopted level of service standards for the number of students per classroom

Maximum capacity = the maximum capacity that may be provided through the use of temporary structures without exceeding core facility capacities

### ***Summary and Recommendations***

The requirement for adequate school facilities is a key element of effective growth management. An ASFO ensures that necessary public facilities and services to support new development are available and adequate, based on adopted level of service (LOS) standards, at the time that the impacts of new development occur.

It is clear from this analysis that York County School Districts experienced increasing rates of growth over the past five years. From the discussion of pipeline development, as well as student generation rates, it is apparent that the school districts will continue to experience rapid growth over the next ten years, and plan to continue to expand their facilities to meet demand. Schools are being pushed to capacity and in some cases are reliant on portable classrooms and enrollment freezes to prevent overcrowding.

[Insert a summary of recommendations.]