

UNION COUNTY PUBLIC SCHOOLS

March 2, 2021

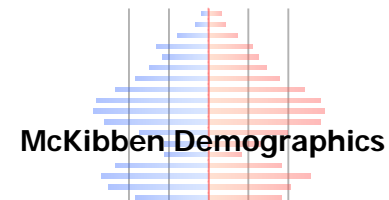
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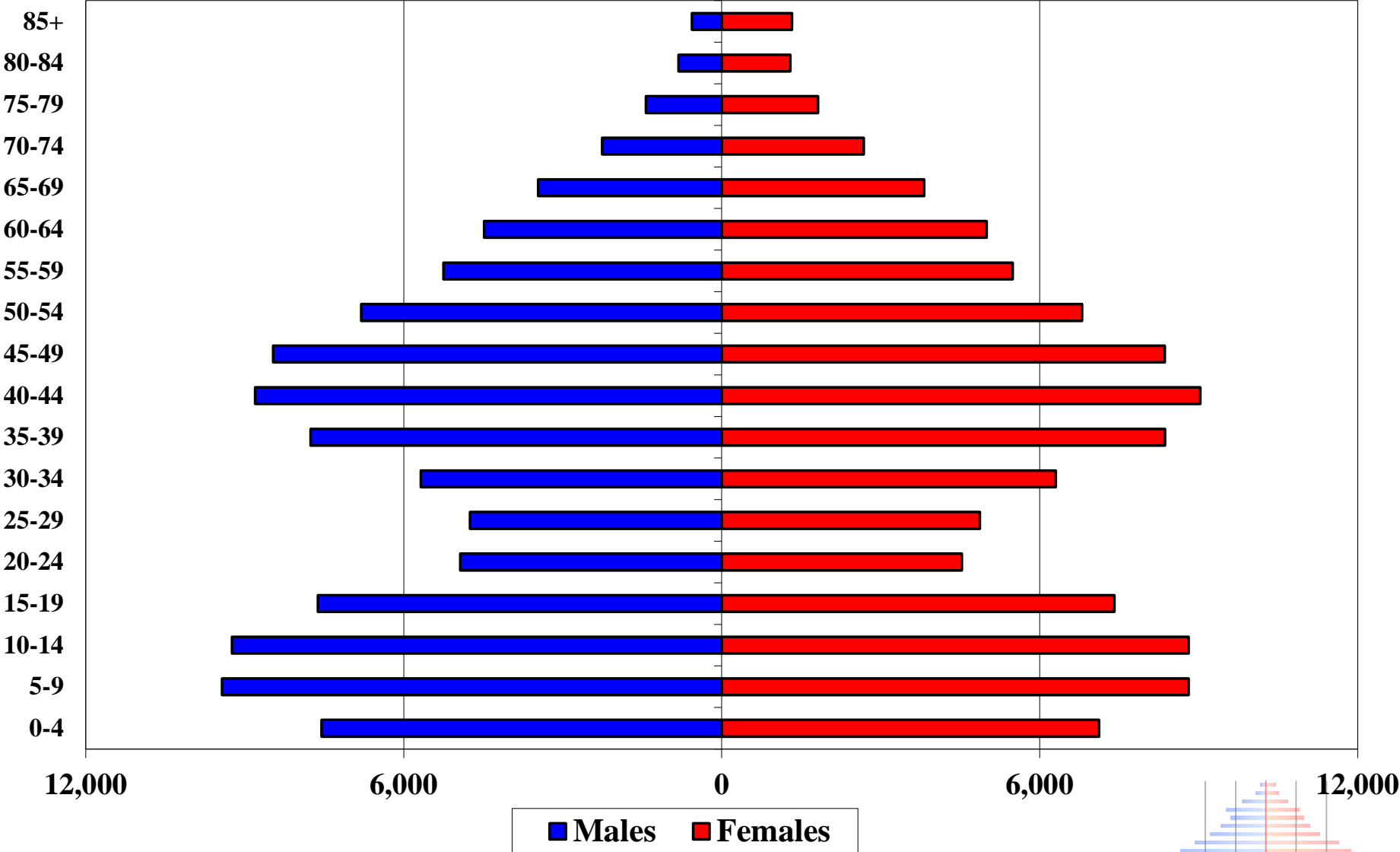
Union County Public Schools Forecast Assumptions

- a. The national, state or regional economy does not go into deep recession at anytime during the 10 years of the forecasts; (Deep recession is defined as four consecutive quarters where the GDP contracts greater than 1% per quarter)
- b. Interest rates have reached an historic low and will not fluctuate more than one percentage point in the short term; the interest rate for a 30 year fixed home mortgage stays below 4.5%;
- c. The rate of mortgage approval stays at 2015-2029 levels and lenders do not return to “sub-prime” mortgage practices;
- d. There are no additional restrictions placed on home mortgage lenders or additional bankruptcies of major credit providers;
- e. The rate of housing foreclosures does not exceed 125% of the 2015-2020 average of Union County for any year in the forecasts;
- f. All currently planned, platted, and approved housing developments are built out and completed by 2029. All housing units constructed are occupied by 2030;
- g. The average annual unemployment rates for the Charlotte Metropolitan Area will remain below 8.5% for the 10 years of the forecasts;
- h. There are no additional charter or private schools opened in the county over the next 10 years;
- i. The rate of students transferring into and out of the Union County Schools district will remain at the 2015-16 to 2019-20 average;

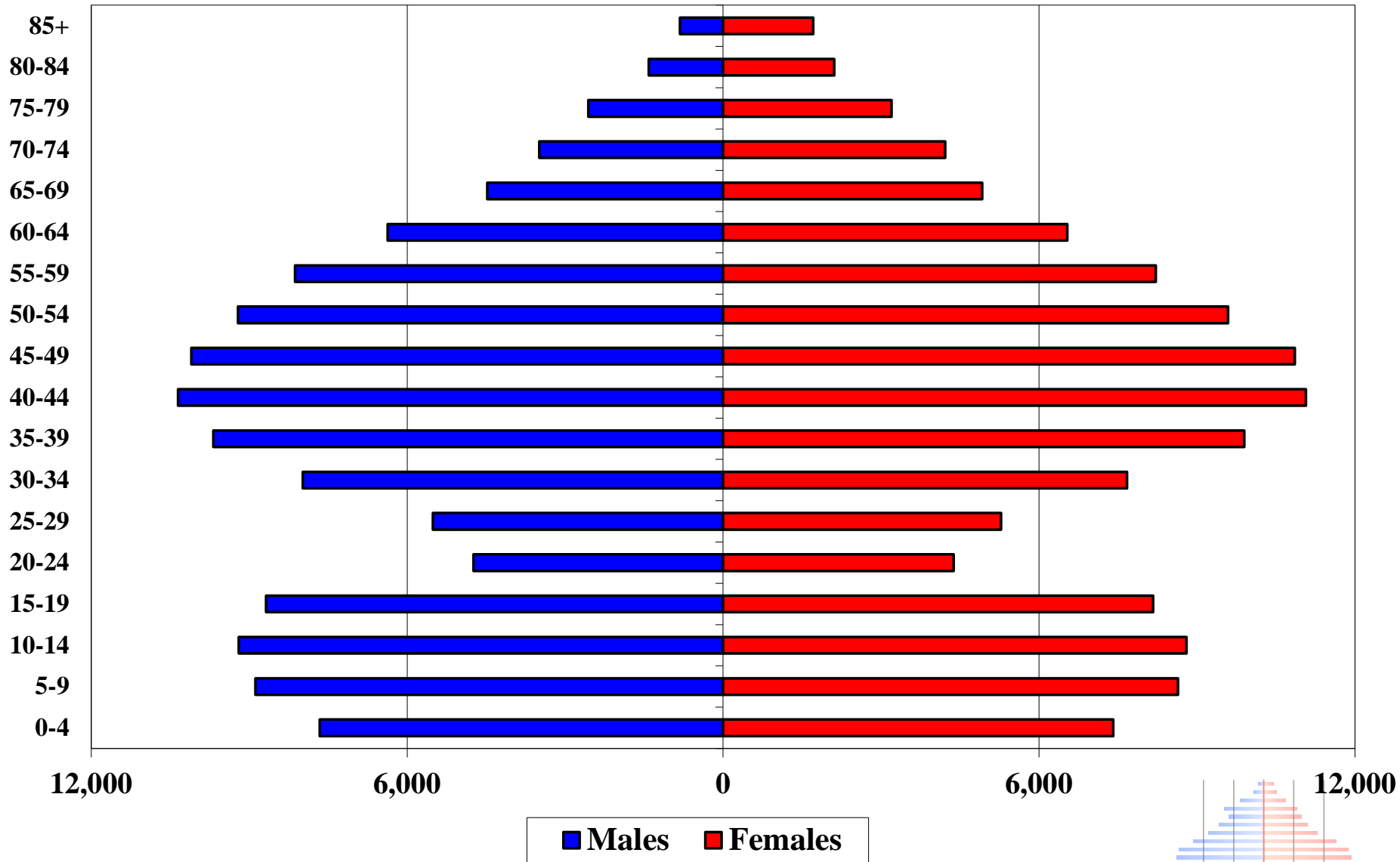
Union County Public Schools Forecast Assumptions

- j. An average of 80% of all students that chose to attend other educational options in the fall of 2020 return to the district by the fall of 2021;
- k. The inflation rate for gasoline will stay below 5% per year for the 10 years of the forecasts;
- l. There will be no residential or commercial building moratorium within the district;
- m. Businesses within the district and the Greater Charlotte Metropolitan Area will remain viable;
- n. The number of existing home sales in the district that are a result of “distress sales” (homes worth less than the current mortgage value) will not exceed 20% of total homes sales in the district for any given year;
- o. Housing turnover rates (sale of existing homes in the district) will remain at their current levels. The majority of existing home sales are made by homeowners over the age of 60;
- p. Existing private school and home school attendance rates will remain constant;
- q. The rate of foreclosures for commercial property remains at the 2015-2020 average for the Charlotte Metropolitan area;
- r. The district and all surrounding school districts return to full time, in-person instruction by the fall of 2021;

Union County, North Carolina Total Population – 2010 Census



Union County, North Carolina Total Population – 2020 Estimate



Union County Public Schools Live—Attend Matrix

Live Attend Matrix

The following tables give details on the schools that students attend and the school zones where they live.

The schools of attendance are listed on the left while the districts where students live are listed on the top line.

The numbers highlighted in green are counts of students who attend the assigned schools for the zones where they live.

These student data are from the October 2020, Union County Public Schools 2020-21 student database.

Union County Public Schools Live—Attend Matrix

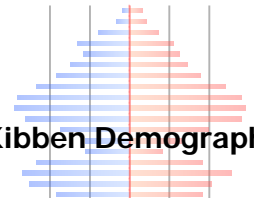
		Where 6-8th Students Live											
		Cuthbertson MS	East Union MS	Marvin Ridge MS	Monroe MS	Parkwood MS	Piedmont MS	Porter Ridge MS	Sun Valley MS	Weddington MS	Out of District	Unmatched	Live Out, Attend In (6-8)
Where 6-8th Students Attend		1,387	751	1,409	1,031	776	960	1,272	1,107	1,215	9	5	374
Cuthbertson MS	1,387	1,348	17	1	11			5	5				39
East Union MS	722	698		13	1	3	2	1		2	2		22
Marvin Ridge MS	1,402	17	1,362	4	9		1	5	2	1	1		39
Monroe MS	978	19	940	3	9			4		1	2		36
Parkwood MS	806	9	10	1	41	739	3	3					67
Piedmont MS	966		9	5	2	922	21	5		2			44
Porter Ridge MS	1,265		6	3		14	1,233	7	1	1			32
Sun Valley MS	1,072	2		5	3	2	6	1,052	2				20
Weddington MS	1,278	8	4	27	3	3	4	4	20	1,203	2		75
South Providence School	14		3		5	3	1		2				
Wolfe School	32	3	2	2	11	2	2	5	3	2			
Live In, Attend Out (6-8)	411	39	53	47	91	37	38	39	55	12			

Union County Public Schools Live—Attend Matrix

		Where 9-12th Students Live													
		Cuthbertson HS	Forest Hills HS	Marvin Ridge HS	Monroe HS	Parkwood HS	Piedmont HS	Porter Ridge HS	Sun Valley HS	Weddington HS	Out of District	Unmatched	Live Out, Attend In (9-12)		
		2,078	1,023	2,059	1,191	1,058	1,345	1,910	1,643	1,804	10	6	776		
Where 9-12th Students Attend	Cuthbertson HS	1,929	1,834	1	77	2	5		2	3	4		1	94	
	Forest Hills HS	895		855		25	2		5	2	3		1	2	38
	Marvin Ridge HS	1,918	41	4	1,808	5	7		11	18	24				110
	Monroe HS	1,003		21	1	941	1	22	1	11	3	1	1		61
	Parkwood HS	1,041	50	7		36	928	8		8	4				113
	Piedmont HS	1,273	1	13	1	6	1	1,176	63	10			2		97
	Porter Ridge HS	1,673				3	2	19	1,628	17	1			1	44
	Sun Valley HS	1,384	1			10	1	4	3	1,311	53	1			73
	Weddington HS	1,738	18	1	103		2	1	5	14	1,592	2			146
	CATA	839	103	60	60	76	84	67	115	166	105	2	1		
	Early College (UCEC)	306	18	36	3	52	16	33	69	68	11				
	South Providence School	57	4	10	1	18	6	5	5	7		1			
	Wolfe School	71	8	13	5	17	3	5	6	7	7				
	Live In, Attend Out (9-12)	2,038	244	168	251	250	130	169	282	332	212				

Union County Public Schools Total Population

	2010	2015	2020	2025	2030
0-4	14,671	14,990	15,070	15,100	14,060
5-9	18,239	17,420	17,520	17,060	17,690
10-14	18,053	18,880	18,000	18,000	17,520
15-19	15,030	16,180	16,850	16,030	16,290
20-24	9,465	9,360	9,120	9,420	9,040
25-29	9,621	11,010	10,790	10,460	10,710
30-34	11,978	13,930	15,650	15,290	14,810
35-39	16,120	17,190	19,580	20,540	19,920
40-44	17,833	19,890	21,420	23,360	23,930
45-49	16,824	18,940	20,960	22,390	24,170
50-54	13,603	16,720	18,800	20,770	22,160
55-59	10,738	13,320	16,350	18,360	20,370
60-64	9,484	10,330	12,910	15,810	17,740
65-69	7,287	8,690	9,400	11,620	14,180
70-74	4,936	6,490	7,710	8,490	10,430
75-79	3,246	4,310	5,760	6,770	7,480
80-84	2,105	2,580	3,520	4,590	5,530
85+	1,886	2,120	2,530	3,160	4,160
Total	201,120	222,350	241,940	257,220	270,190
Median Age	36.1	37.7	39.6	41.4	43.1
Births	12,220	12,340	11,640	11,370	
Deaths	5,490	6,660	8,090	9,730	
Natural Increase	6,730	5,680	3,550	1,640	
Net Migration	14,540	13,600	11,960	11,040	
Change	<i>21,270</i>	<i>19,280</i>	<i>15,510</i>	<i>12,680</i>	



Union County Public Schools Total Enrollment

	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31
K	2521	2505	2600	2166	2626	2665	2630	2662	2673	2690	2696	2709	2725	2663
1	2632	2649	2659	2548	2679	2644	2689	2720	2754	2764	2779	2786	2803	2812
2	2805	2731	2741	2592	2652	2738	2669	2716	2749	2780	2791	2807	2816	2833
3	3044	2917	2861	2711	2697	2729	2763	2696	2746	2775	2805	2817	2836	2846
4	3053	3095	3080	2860	2817	2784	2763	2795	2732	2778	2808	2839	2853	2872
5	3215	3080	3201	3016	2979	2907	2828	2800	2838	2773	2819	2852	2882	2895
Total: K-5	17270	16977	17142	15893	16450	16467	16342	16389	16492	16560	16698	16810	16915	16921
6	3213	3283	3259	3211	3232	3152	3074	2983	2962	3026	2959	3007	3043	3070
7	3343	3273	3367	3286	3332	3309	3229	3148	3052	3055	3120	3051	3101	3134
8	3326	3445	3372	3431	3391	3403	3373	3294	3202	3128	3131	3197	3126	3179
Total: 6-8	9882	10001	9998	9928	9955	9864	9676	9425	9216	9209	9210	9255	9270	9383
9	3813	3717	3789	3731	3866	3833	3828	3820	3722	3621	3595	3537	3610	3537
10	3625	3641	3530	3677	3640	3773	3740	3734	3718	3625	3524	3500	3441	3510
11	3525	3478	3484	3387	3547	3511	3643	3609	3603	3582	3494	3393	3369	3310
12	3199	3377	3382	3374	3344	3496	3461	3590	3560	3549	3526	3446	3344	3324
Total 9-12	14162	14213	14185	14169	14397	14613	14672	14753	14603	14377	14139	13876	13764	13681
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total: K-13	41314	41191	41325	39990	40802	40944	40690	40567	40311	40146	40047	39941	39949	39985
Total: K-13	41314	41191	41325	39990	40802	40944	40690	40567	40311	40146	40047	39941	39949	39985
Change		-123	134	-1335	812	142	-254	-123	-256	-165	-99	-106	8	36
%-Change		-0.3%	0.3%	-3.2%	2.0%	0.3%	-0.6%	-0.3%	-0.6%	-0.4%	-0.2%	-0.3%	0.0%	0.1%
Total: K-5	17270	16977	17142	15893	16450	16467	16342	16389	16492	16560	16698	16810	16915	16921
Change		-293	165	-1249	557	17	-125	47	103	68	138	112	105	6
%-Change		-1.7%	1.0%	-7.3%	3.5%	0.1%	-0.8%	0.3%	0.6%	0.4%	0.8%	0.7%	0.6%	0.0%
Total: 6-8	9882	10001	9998	9928	9955	9864	9676	9425	9216	9209	9210	9255	9270	9383
Change		119	-3	-70	27	-91	-188	-251	-209	-7	1	45	15	113
%-Change		1.2%	0.0%	-0.7%	0.3%	-0.9%	-1.9%	-2.6%	-2.2%	-0.1%	0.0%	0.5%	0.2%	1.2%
Total: 9-12	14162	14213	14185	14169	14397	14613	14672	14753	14603	14377	14139	13876	13764	13681
Change		51	-28	-16	228	216	59	81	-150	-226	-238	-263	-112	-83
%-Change		0.4%	-0.2%	-0.1%	1.6%	1.5%	0.4%	0.6%	-1.0%	-1.5%	-1.7%	-1.9%	-0.8%	-0.6%

Overview of Forecast Results by Cluster

- **Cuthbertson** - Peak of enrollment wave currently in High School. A slow decline in Middle school and elementary enrollment the next 10 years due to “empty nesting”.
- **Forest Hills** - Mostly stable with a small decline in high school enrollment to next five years.
- **Marvin Ridge** – The enrollment wave is currently in middle school and high school. Enrollment declines sharply after 2025 as smaller elementary cohorts age into the later grades. This area has the highest rate of “empty nesting” in the district.

Overview of Forecast Results by Cluster

- **Monroe** – The continued high rate of apartment occupancy helps keep enrollment steady throughout the decade.
- **Parkwood** – new home construction in the NC 75 corridor keeps enrollment steady until 2025. An increasing rate of home “turnover” leads to slight growth after that.
- **Piedmont** – New home construction and turnover leads to modest, but sustained enrollment growth this decade, but only in the elementary and middle school grades.

Overview of Forecast Results by Cluster

- **Porter Ridge** – Sustained and continuous enrollment growth throughout the decade due to new home construction and housing turnover.
- **Sun Valley** – Sustained and continuous enrollment growth throughout the decade due to new home construction and housing turnover. However the rate of increase is lower than in Porter Ridge.
- **Weddington** – A slow decline after 2024 at all levels due to empty nesting. However a modest level of home construction causes the decline to be smaller and slower than in Cuthbertson.