



Montgomery Planning

Functional Planning and Policy Division

06/20/2019

Agenda item 08

FY2020 Annual School Test

Results Effective July 1, 2019



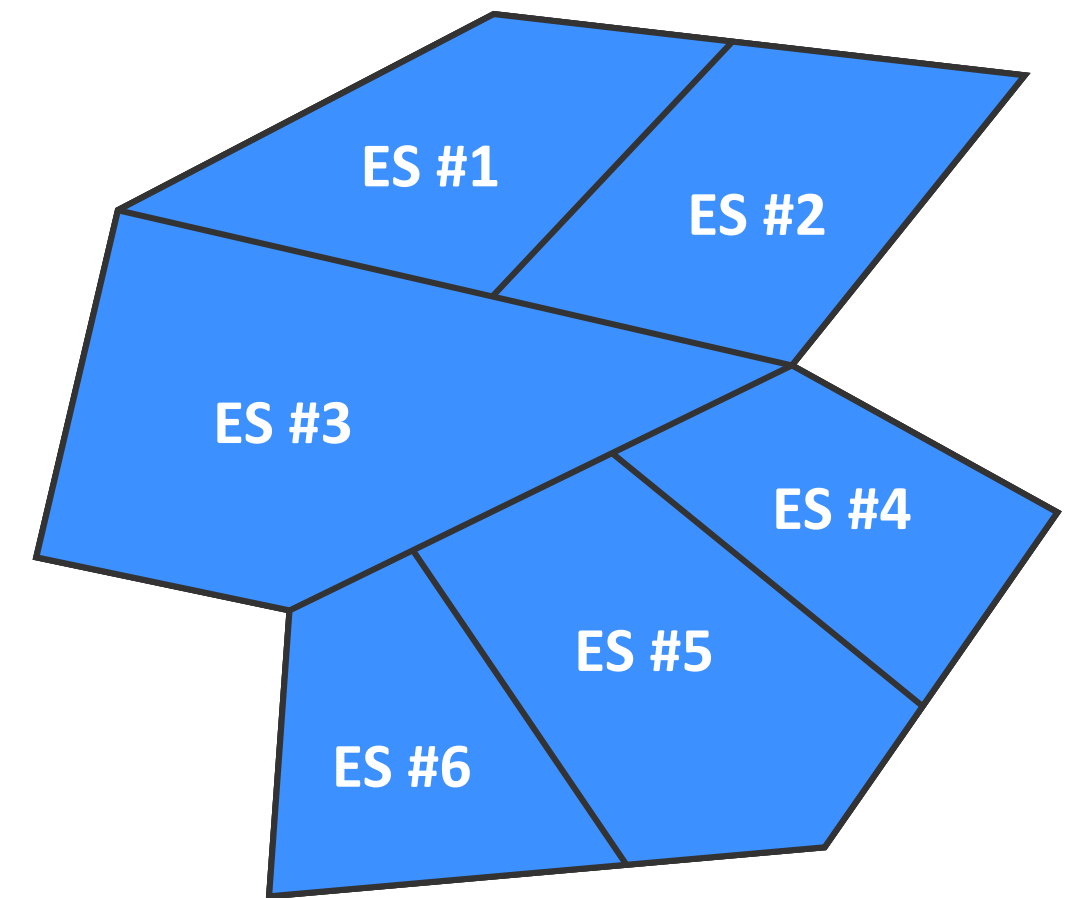
Annual School Test Overview

- Timeline:
 - May – Council adopts Capital Budget and CIP amendments
 - June – Planning Board certifies test results
 - July – new test results take effect
- Test basis:
 - Projected utilization five years in the future
 - The FY20 test based on projections for the **2024-25 school year** (FY25)

Annual School Test Overview

The annual school test is a two-tiered test. Adequacy is reviewed at

- the **cluster** level for elementary, middle and high school, and at
- the **school** level for individual elementary and middle schools



Cluster Test Results

Test Overview: Cluster Test

Cluster Moratorium Threshold:

Projected cumulative utilization greater than 120% at any school level (elementary, middle or high school) across the entire cluster is the threshold at which residential subdivision approvals are halted.

Subdivision Staging Policy FY 2020 School Test Results Summary
 Reflects Approved FY 2020 Capital Budget and Amendments to the FY 2019-2024 Capital Improvements Program (CIP)
 Effective July 1, 2019

School Test Description and Details	School Test Outcome	Elementary School Inadequate	Middle School Inadequate	High School Inadequate
CLUSTER TEST Inadequate if cluster is over 120% utilization, by level Test year 2024-25	<u>MORATORIUM</u> Moratorium required in cluster service areas that are inadequate.	James Hubert Blake (124.8%)		Montgomery Blair (124.3%) Albert Einstein (130.1%) Walter Johnson (129.3%)
	<u>OPEN CONDITIONALLY - Placeholder</u> Placeholder projects prevent these cluster service areas from entering moratoria. <i>See notes.</i>			
	<u>OPEN CONDITIONALLY - CIP</u> Planned projects in other clusters and/or future reassignments prevent these cluster service areas from entering moratoria. <i>See notes.</i>			Clarksburg (140.0%) ¹ Richard Montgomery (122.7%) ² Northwest (130.4%) ¹ Northwood (138.7%) ³ Quince Orchard (125.8%) ²

Moratoria:

- James H. Blake Cluster (124.8% ES utilization)
- Montgomery Blair Cluster (124.3% HS utilization)
- Albert Einstein Cluster (130.1% HS utilization)
- Walter Johnson Cluster (129.3% HS utilization)

How long will the moratoria last?

James H. Blake Cluster

- “Major Capital Projects” (P651913) – nearly \$120 million in the approved CIP to be allocated to projects in the **next CIP**.

Montgomery Blair and Albert Einstein Clusters

- Reassigning students to Northwood HS when its addition is completed in **September 2025** (P651907).

Walter Johnson Cluster

- Reassigning students to a reopened Woodward HS (P651908) when Northwood students return to their reopened school in **September 2025**.

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Open Conditionally due to Approved CIP Projects:

- Clarksburg Cluster (140.0% HS utilization)
- Richard Montgomery Cluster (122.7% HS utilization)
- Northwest Cluster (130.4% HS utilization)
- Northwood Cluster (138.7% HS utilization)
- Quince Orchard Cluster (125.8% HS utilization)

CIP Modifications

Seneca Valley HS rev/ex (P926575) opening in 2020		
Clarksburg Cluster (HS)	-527 students	119 student moratorium threshold
Northwest Cluster (HS)	-373 students	135 student moratorium threshold
Seneca Valley Cluster (HS)	+900 students	896 student moratorium threshold

Crown HS (P651909) reassignment in 2024		
Richard Montgomery Cluster (HS)	-120 students	59 student moratorium threshold
Quince Orchard Cluster (HS)	-150 students	43 student moratorium threshold

Woodward HS (P651908) temporary relocation in 2023		
Northwood Cluster (HS)	+1,192 seats	1,147 student moratorium threshold

Individual School Test Results

Test Overview: Individual School Test

Elementary School Moratorium Thresholds:

- Projected utilization greater than 120%
- Projected capacity deficit of 110 seats or more

Middle Schools Moratorium Thresholds:

- Projected utilization greater than 120%
- Projected capacity deficit of 180 seats or more

School Test Description and Details	School Test Outcome	Elementary School Inadequate	Middle School Inadequate	High School Inadequate
<p>INDIVIDUAL SCHOOL TEST</p> <p>Inadequate if school is over 120% utilization and at or above seat deficit thresholds</p> <p>Elementary: 110 seats Middle: 180 seats</p> <p>Test year 2024-25</p>	<p><u>MORATORIUM</u></p> <p>Moratorium required in school service areas that are inadequate.</p>	<p>Burning Tree ES (-127, 133.6%) Burnt Mills ES (-277, 170.7%) Clopper Mill ES (-148, 131.5%) Cloverly ES (-143, 131.0%) Farmland ES (-183, 125.6%) Highland View ES (-114, 139.6%) Lake Seneca ES (-173, 141.7%) Thurgood Marshall ES (-179, 132.1%) William T. Page ES (-289, 174.7%) Judith A. Resnik ES (-154, 130.9%) Sargent Shriver ES (-167, 124.8%) South Lake ES (-176, 125.1%) Stonegate ES (-161, 143.3%)</p>		
	<p><u>OPEN CONDITIONALLY - Placeholder</u></p> <p>Placeholder projects prevent these school service areas from entering moratoria. <i>See notes.</i></p>	<p>Bethesda ES (-171, 130.5%)^a Somerset ES (-141, 127.4%)^b</p>	<p>Francis Scott Key MS (-209, 121.8%)^c</p>	
	<p><u>OPEN CONDITIONALLY - CIP</u></p> <p>Planned projects in other schools and/or future reassignments prevent these school service areas from entering moratoria. <i>See notes.</i></p>	<p>Rachel Carson ES (-355, 151.4%)⁴ Clarksburg ES (-321, 203.2%)⁵ Forest Knolls ES (-246, 146.5%)⁶ JoAnn Leleck ES (-282, 139.4%)⁷ Strawberry Knoll ES (-247, 154.4%)⁸ Summit Hall ES (-276, 163.4%)⁸</p>		

Moratoria:

- 13 elementary school service areas will enter moratoria.
- Five of these are at least partially already in moratoria at the cluster level.

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Open Conditionally due to Placeholders:

- Bethesda ES (-171, 130.5%) – 6 classrooms
- Somerset ES (-141, 127.4%) – 4 classrooms
- Francis Scott Key MS (-209, 121.8%) – 4 classrooms

Placeholder Modifications

Bethesda ES Solution (P651916)

Bethesda ES	+138 seats (6 classrooms)	107 student moratorium threshold
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Somerset ES Solution (P651914)

Somerset ES	+92 seats (4 classrooms)	73 student moratorium threshold
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Francis Scott Key MS Solution (P652004)

Francis Scott Key MS	+85 seats (4 classrooms)	86 student moratorium threshold
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Open Conditionally due to Approved CIP Projects:

- Rachel Carson ES (-355, 151.4%)
 - Clarksburg ES (-321, 203.2%)
 - Forest Knolls ES (-246, 146.5%)
- JoAnn Leleck ES (-282, 139.4%)
 - Strawberry Knoll ES (-247, 154.4%)
 - Summit Hall ES (-276, 163.4%)

CIP Modifications

DuFief ES addition (P651905) opening in 2022

Rachel Carson ES	-389 students	173 student moratorium threshold
DuFief ES	+389 students	186 student moratorium threshold

Clarksburg ES #9 (P651901) opening in 2022

Clarksburg ES	-378 students	167 student moratorium threshold
Cedar Grove ES	-53 students	187 student moratorium threshold
Wilson Wims ES	-172 students	290 student moratorium threshold
Clarksburg ES #9	+603 students	N/A (no service area yet)

Roscoe R. Nix ES and Cresthaven ES additions (P651902/P651903) opening in 2022

JoAnn Leleck ES	-320 students	182 student moratorium threshold
Nix ES/Cresthaven ES	+320 students	377 student moratorium threshold

CIP Modifications

Montgomery Knolls ES and Pine Crest ES additions (P651708/P651709) opening in 2020

Forest Knolls ES	-277 students	141 student moratorium threshold
Montgomery Knolls ES/Pine Crest ES	+277 students	341 student moratorium threshold

Gaithersburg ES #8 (P651901) opening in 2022

Gaithersburg ES	-127 students	142 student moratorium threshold
Rosemont ES	-107 students	108 student moratorium threshold
Strawberry Knoll ES	-238 students	101 student moratorium threshold
Summit Hall ES	-267 students	101 student moratorium threshold
Washington Grove ES	-16 students	111 student moratorium threshold
Gaithersburg ES #8	+755 students	N/A (no service area yet)

School Queue Overview

The following cluster service areas are close to moratoria:

- Damascus Cluster (25 middle school students)
- Rockville Cluster (39 middle school students)

School Queue Overview

The following school service areas are close to moratoria:

- Bannockburn ES (1 student)
- Watkins Mill ES (9 students)
- Olney ES (14 students)
- Greencastle ES (24 students)
- Cashell ES (26 students)
- Capt. James E. Daly (27 students)
- John T. Baker MS (13 students)
- Argyle MS (23 students)
- Earle B. Woods MS (40 students)

FY2020 Annual School Test Results

FY2020 Annual School Test - Service Area Status

Cluster Boundary

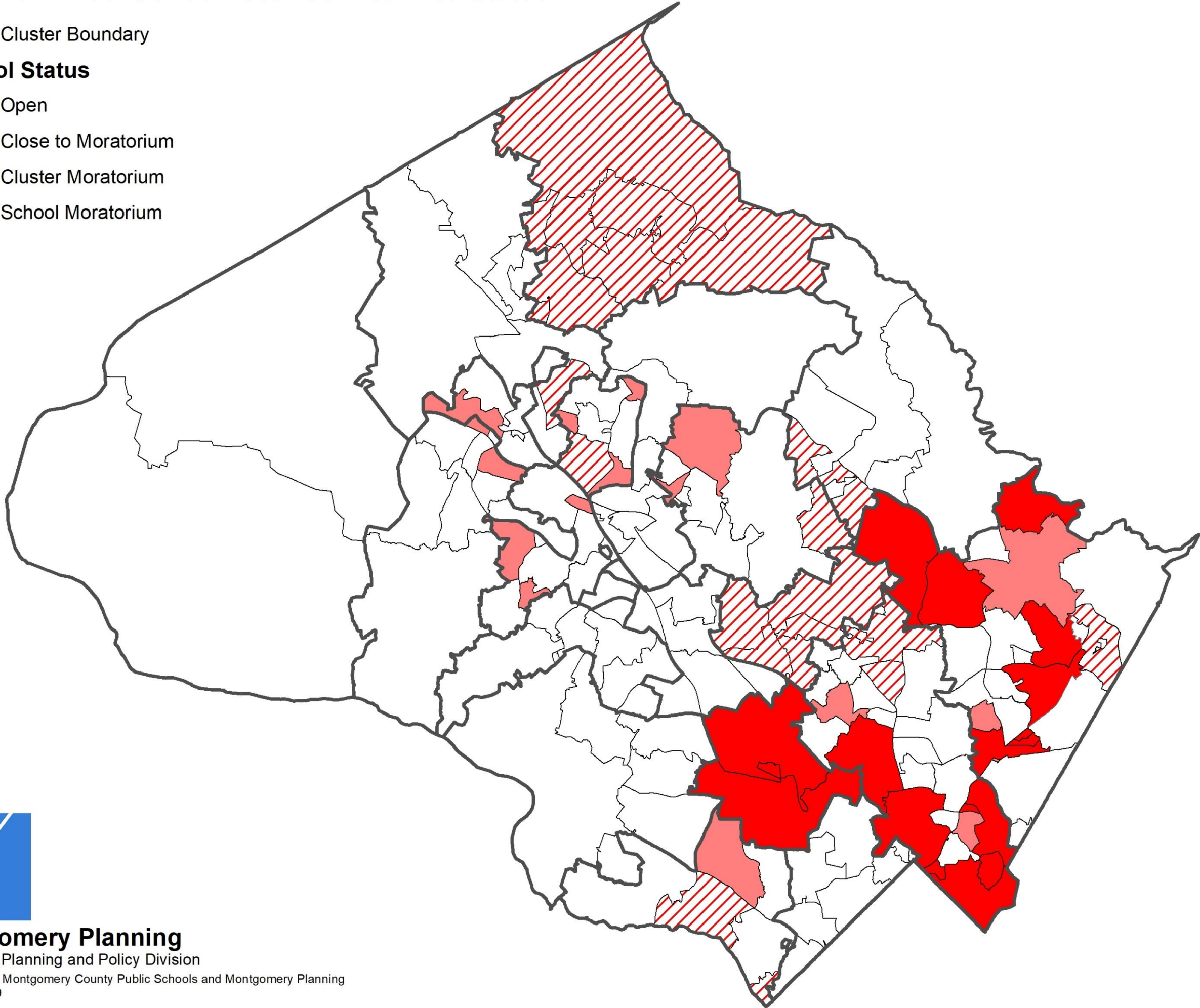
School Status

Open

Close to Moratorium

Cluster Moratorium

School Moratorium



Montgomery Planning

Functional Planning and Policy Division

Data Source: Montgomery County Public Schools and Montgomery Planning
June 20, 2019

Updated Student Generation Rates

About Student Generation Rates

A ratio that identifies the average number of MCPS students living in a single dwelling unit of a particular housing type within a particular geography.

Used to...

- calculate school impact taxes
- estimate a sector plan's potential enrollment impacts
- estimate the enrollment impacts of a development application
- help project future enrollment (MCPS)

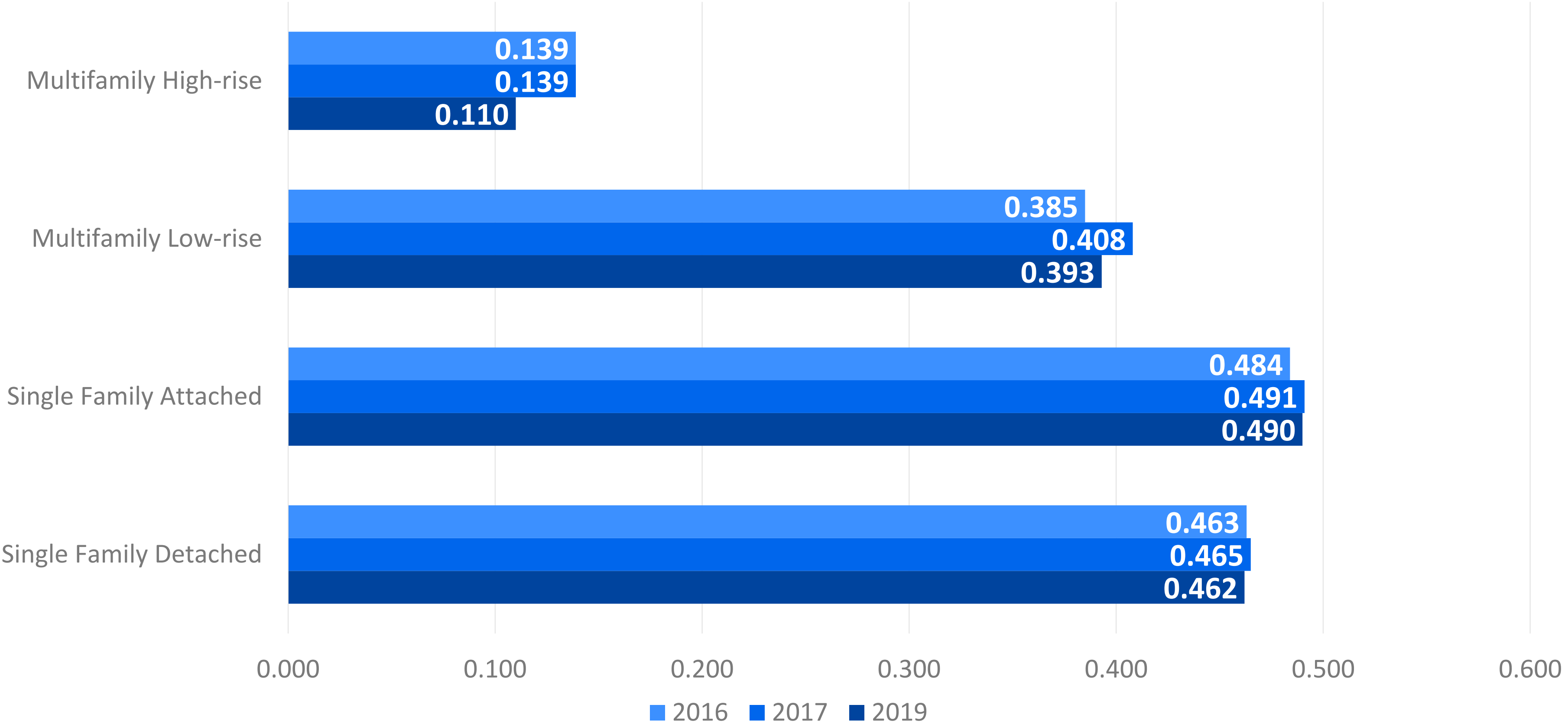
Updated every two years:

- **New rates using September 2018 enrollment and housing data; will started using these in July 2019.**

New Countywide Student Generation Rates

	Elementary	Middle	High	K-12
Single Family Detached	0.199	0.110	0.154	0.462
Single Family Attached	0.227	0.113	0.150	0.490
Multifamily Low-rise	0.197	0.086	0.109	0.393
Multifamily High-rise	0.055	0.023	0.031	0.110

Countywide K-12 Student Generation Rates by Dwelling Type and Year



Upcounty Region Clusters

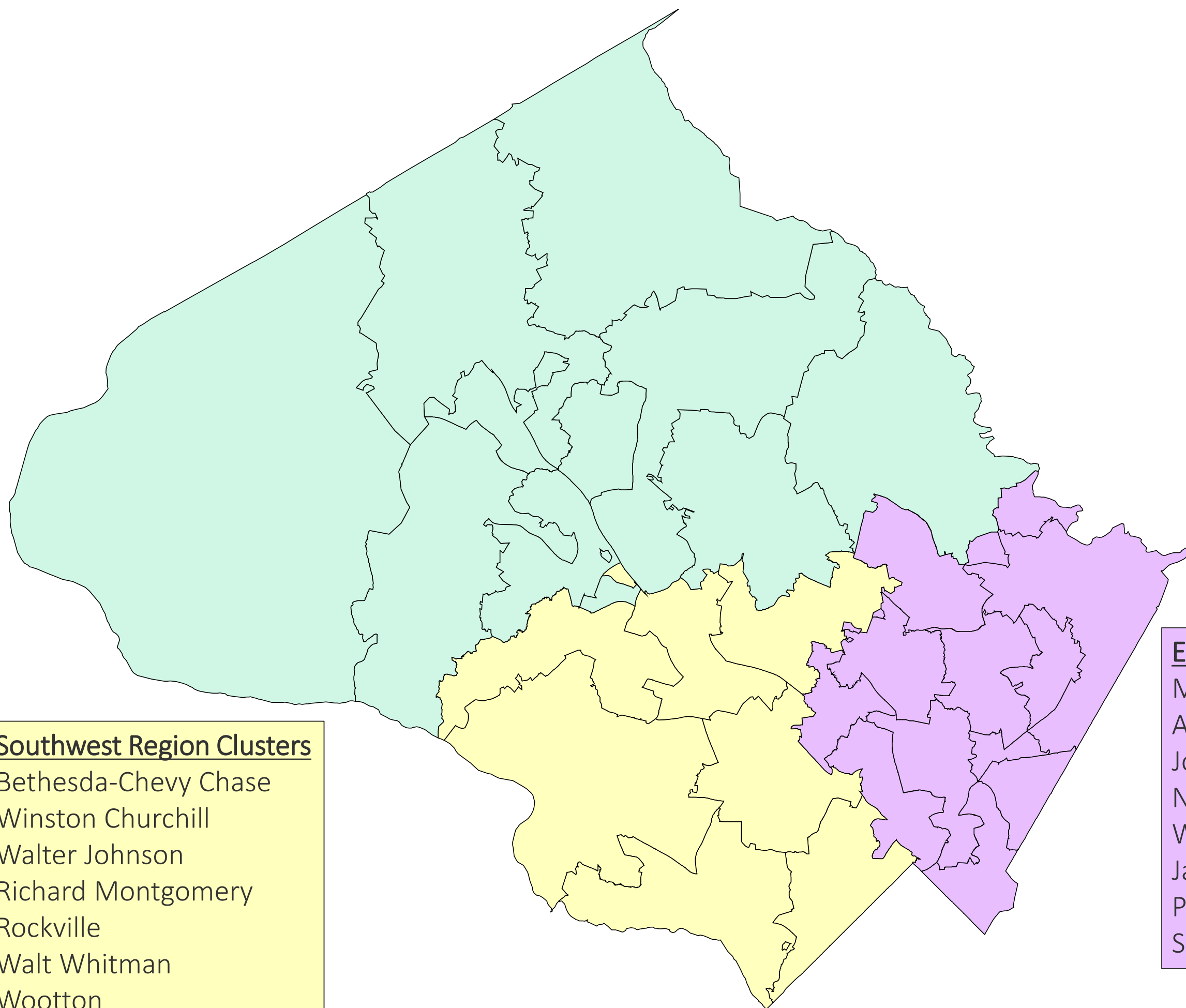
Clarksburg
Damascus
Gaithersburg
Col. Zadok Magruder
Northwest
Poolesville
Quince Orchard
Seneca Valley
Sherwood
Watkins Mill

Southwest Region Clusters

Bethesda-Chevy Chase
Winston Churchill
Walter Johnson
Richard Montgomery
Rockville
Walt Whitman
Wootton

East Region Clusters

Montgomery Blair
Albert Einstein
John F. Kennedy
Northwood
Wheaton
James H. Blake
Paint Branch
Springbrook



New Regional Student Generation Rates

		Elementary	Middle	High	K-12
Upcounty Region	Single Family Detached	0.210	0.120	0.169	0.499
	Single Family Attached	0.248	0.121	0.157	0.526
	Multifamily Low-rise	0.183	0.077	0.093	0.352
	Multifamily High-rise	0.020	0.008	0.010	0.038
Southwest Region	Single Family Detached	0.186	0.109	0.151	0.446
	Single Family Attached	0.167	0.085	0.111	0.363
	Multifamily Low-rise	0.150	0.068	0.085	0.303
	Multifamily High-rise	0.041	0.018	0.025	0.084
East Region	Single Family Detached	0.203	0.103	0.144	0.450
	Single Family Attached	0.219	0.115	0.160	0.494
	Multifamily Low-rise	0.253	0.112	0.148	0.512
	Multifamily High-rise	0.088	0.036	0.047	0.171

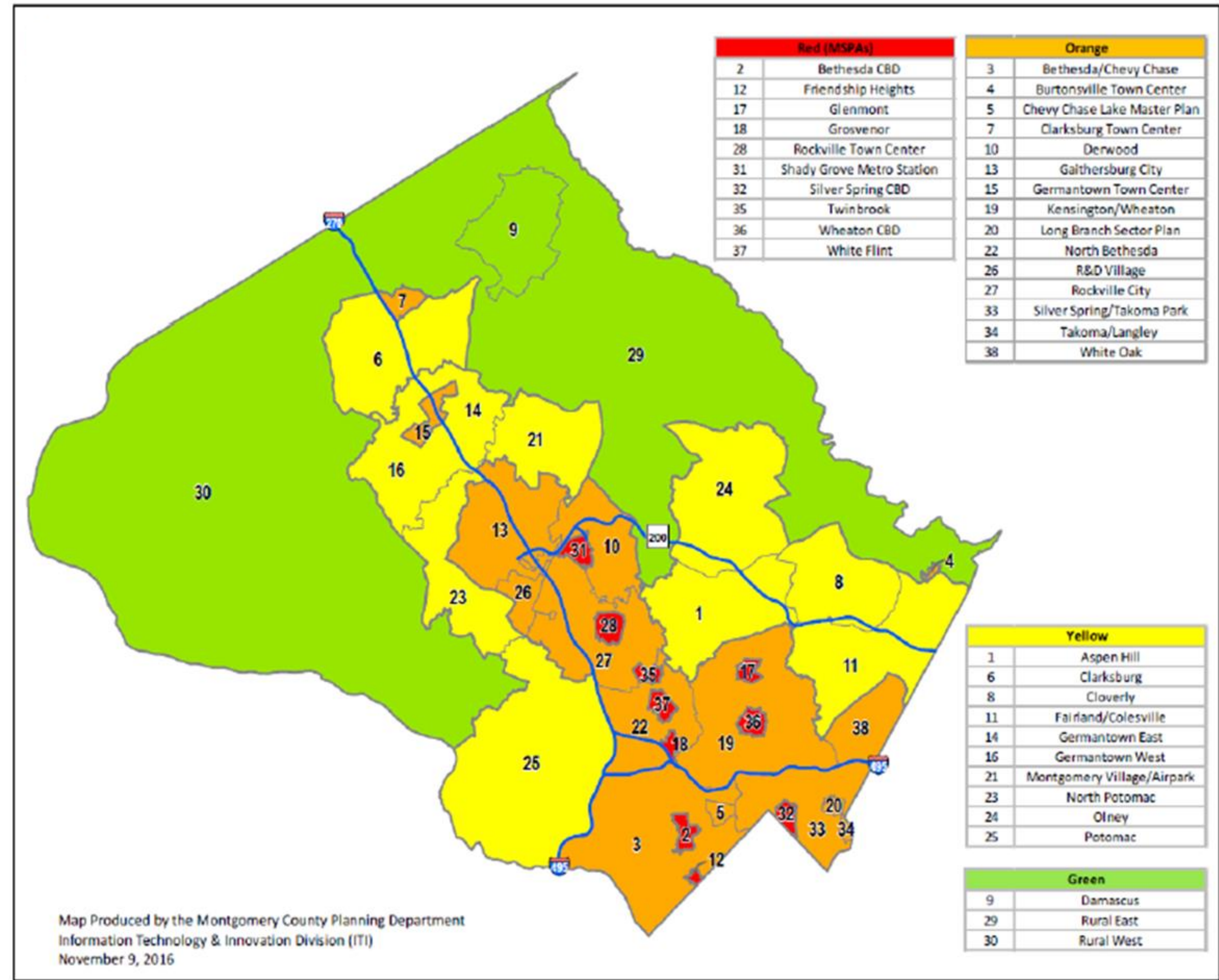
Updated Impact Taxes

Impact Tax Updates

- Updated every two years, effective July 1 of odd-numbered years
- Transportation Basis
 - construction cost index
- Schools Basis
 - updated student generation rates
 - updated school construction costs (actual)

Transportation Impact Taxes

- Different impact taxes based on transportation policy area and use.
- This year's increase was 10.83%



Transportation Impact Taxes

	Red Policy Areas	Orange Policy Areas	Yellow Policy Areas	Green Policy Areas
Residential (per unit)				
Single Family Detached	\$7,838	\$19,591	\$24,490	\$24,490
Single Family Attached	\$6,413	\$16,030	\$20,038	\$20,038
Multifamily Low-rise	\$4,986	\$12,465	\$15,582	\$15,582
Multifamily High-rise	\$3,561	\$8,904	\$11,130	\$11,130
Multifamily Senior	\$1,424	\$3,562	\$4,452	\$4,452
Non-Residential (per square foot GFA)				
Office	\$7.15	\$17.90	\$22.40	\$22.40
Industrial	\$3.60	\$8.90	\$11.20	\$11.20
Bioscience Facility	\$0.00	\$0.00	\$0.00	\$0.00
Retail	\$6.35	\$16.00	\$19.95	\$19.95
Place of Worship	\$0.00	\$0.00	\$0.00	\$0.00
Private Elementary and Secondary School	\$0.55	\$1.45	\$1.85	\$1.85
Hospital	\$0.00	\$0.00	\$0.00	\$0.00
Social Service Agency	\$0.00	\$0.00	\$0.00	\$0.00
Other Non-Residential	\$3.60	\$8.90	\$11.20	\$11.20

School Impact Taxes

- This year's increases varied by dwelling type:
 - Single Family Detached: 13.6% increase
 - Single Family Attached: 13.9% increase
 - Multifamily Low-rise: 10.2% increase
 - Multifamily High-rise: 10.0% decrease

School Impact Taxes

Residential (per unit)	Countywide
Single Family Detached	\$26,207
Single Family Attached	\$27,598
Multifamily Low-rise	\$21,961
Multifamily High-rise	\$6,113
Multifamily Senior	\$0